Office of Human Resources
PeopleAdmin 7 User Guide
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To access PeopleAdmin, you will need your University ODIN username and password. You should see the secure login screen below. Click on the “SSO Authentication” link below the login box and use your ODIN username and password.

You may also locate the PeopleAdmin login link from the “Manager’s Corner” Easy Access table on the Human Resources web site (http://www.pdx.edu/hr/managers-corner).

If you have any questions, please contact your HR Partner in the Office of Human Resources.
Once you are logged into PeopleAdmin the “Home” page will display an “Inbox,” “Watch List,” and other links where you can easily navigate to the requests that need your attention. Below is a detailed list of the home page functions available:

**Inbox**
Displays all items requiring your attention (approval/review).

**Watch List**
Displays any request you have added to your watch list (Postings, Hiring Proposals, Requests) for easy access.

**My Profile & Help**
Used to update your user account details and online help for using the system.

**APPLICANT TRACKING\nPOSITION MANAGEMENT**
Used to toggle between the Applicant Tracking and Position Management modules.

**User Group**
Displays the user group choices available to you.
Use the refresh icon to change your user group.

The system notification at the top of the screen will indicate your current user group view and other important messages.
Module Type Definitions
Position Management (orange banner) used to:
- View position descriptions
- Print position descriptions
- Create new position descriptions
- Request changes/refill position descriptions
- View pending position requests

Applicant Tracking (blue banner) used to:
- Create new postings
- View postings
- View application materials
- Export/Print application materials
- Change status of applicants
- Create hiring proposals
- View pending hiring proposals

User Group Definitions
Your user group is assigned based on your role and authority level within the University’s approval process.

Initiator:
- View position descriptions
- Create new position descriptions
- Request that positions be filled or refilled
- Request changes to position descriptions
- View pending position requests
- Create new postings
- View postings
- View application materials
- Print application materials
- Change status of applicants
- Create hiring proposals
- View pending hiring proposals
User Group Definitions (continued)
Position Description Viewer:
• View position descriptions
• Print position descriptions

Search Committee Member:
• View application materials
• Print application materials

Approver (e.g., Department Head/Chair, Director/Dean/AVP, Provost/VP):
• Approve position description requests
• Approve hiring proposal requests

Employee Group Definitions
Classified:
• Support staff
• Represented by SEIU

Admin:
• Academic Professionals
• Excluded Faculty (e.g., Department Chair)
• Executive Committee Members
• Deans
• Associate/Assistant Deans
• Managerial
• Unclassified Excluded/Unrepresented

Faculty:
• Teaching and Research Faculty
• Represented by AAUP
This section will cover step-by-step instructions to complete the following requests in the Position Management Module:

- View position descriptions
- Print position descriptions
- Create new position descriptions
- Request changes to/refill existing position descriptions
View a Position Description

1. Verify that you are in the “Position Management” module and the “Initiator” or “Position Description Viewer” user group.
2. Hover over Position Descriptions and select the appropriate employee group.
3. Select the desired position description by clicking on the “Working Title.”
4. You may view the position description by clicking on . If you are in the “Initiator” user group, you will see the full position description, with all the data that was entered at the time the position was created. This is not the version that should be printed and reviewed with your employee [see “Print Position Description” below].

Print a Position Description

1. Verify that you are in the “Position Management” module and the “Position Description Viewer” user group.
2. Hover over Position Descriptions and select the appropriate employee group.
3. Select the desired position description by clicking on the “Working Title.”
4. You may view the position description by clicking on . You can print this position description by using your browser tools (“File,” “Print”).

Create a New Position Description (With Option to Fill)

1. Verify that you are in the “Position Management” module and the “Initiator” user group.
2. Hover over “Position Descriptions” and select the appropriate employee group from the drop-down menu (for this example, “Classified” will be used).
3. Click **Create New Position Description** on the right-hand side, about ¼ of the way down the page.

4. Select the “Establish New Classified Position Description” link.

5. Enter the (proposed) “Working Title.”

6. Verify the “VP/EXCOM,” “School/Admin Unit,” and “Department” (if you have responsibility for more than one department, enter the appropriate department for this position).

7. If you have an existing position description and you wish to copy for this request (clone request), choose that position description from the list at the bottom of the page. This will populate pertinent information from the copied position description into this request and allow for edits.

8. Click **Start Request** to your right.

9. Provide all required data and click “Next” at the bottom of the page to move to the next page. You can track your progress on the left of the screen; completed pages will have a blue check mark. The blue check marks indicate that mandatory fields are complete. However, there may be additional fields to fill in to adequately provide approvers with the information needed to approve and forward the request.
10. Incomplete pages will have an orange exclamation point.

11. After completing all mandatory and optional/recommended fields you will be on the “Request Summary” page. You can review the information you entered into the request for accuracy prior to taking action. Click on “Edit” to return to any incomplete page. Once completed, click on “Save.” You can then return to the “Request Summary.”

12. To take action on the request, hover over near the top right of the page and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”

13. A green bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.

14. To save this request and submit later, select “Keep Working on This Request” under the “Take Action on Request” menu.

**Request Changes to/Refill an Existing Position Description**

1. Verify that you are in the “Position Management” module and the “Initiator” user group.

2. Hover over “Position Descriptions” and select the appropriate employee group from the drop-down menu (for this example, “Classified” will be used).

3. Search for and select the position description you wish to update by highlighting and clicking on either the “Position Number” or the “Working Title.”

4. Click the link to your right.

5. Click to begin updating the position description.
6. The initial page asks for information to determine whether this update will have a corresponding recruitment to refill the position; this helps to route the request appropriately.

7. Provide all required data and click “Next” at the bottom of the page to move to the next page. You can track your progress on the left of the screen.

8. Completed pages will have a blue check mark.

9. Incomplete pages will have an orange exclamation point.

10. After completing all mandatory and optional/recommended fields you will be on the “Request Summary” page. You can review the information you entered into the request for accuracy prior to taking action. Click on “Edit” to return to any incomplete page. Once Completed, click on “Save.” You can then return to the “Request Summary.”

11. To take action on the request, hover over and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”

12. A green bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.

13. To save this request and submit later, select “Keep Working on This Request.”
Applicant Tracking Module (blue)

Where all postings and applicants reside and where hiring proposals are created.

This section will cover step-by-step instructions to complete the following requests in the Applicant Tracking Module:

- Create new postings
- View postings
- View application materials
- Export/Print application materials
- Change status of applicants
- Create hiring proposals
Create a New Posting

1. Verify that you are in the “Applicant Tracking” module and the “Initiator” user group.
2. Hover over “Postings” and select the appropriate employee group from the drop-down menu (for this example, “Admin” will be used).
3. Click on the right-hand side, about ¼ of the way down the page.
4. Click the “Create from Position Description” link.
5. Search for and select the position description you wish to post by clicking on either the “Position Number” or the “Working Title.”
6. Click the link on the right.
7. Check the appropriate profile at the bottom of the page (e.g., Admin Profile), then click.
8. Provide all required data and click “Next” at the bottom of the page to move to the next page. Most of the information in the posting will populate automatically if the associated position description was filled out completely. You can track your progress on the left of the screen; completed pages will have a blue check mark. The blue check marks indicate that mandatory fields are complete.
9. Incomplete pages will have an orange exclamation point.
Applicant Tracking Module

10. After completing all mandatory and optional/recommended fields you will be on the “Summary” page. You can review the information you entered into the posting for accuracy prior to taking action. Click on “Edit” to return to any incomplete page. Once completed, click on “Save.” You can then return to the “Summary.”

11. To take action on the request, hover over near the top right of the page and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”

12. A green bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.

13. To save this request and submit later, select “Keep Working on This Request” under the “Take Action on Request” menu.

View Postings and Review Applicants

1. Verify that you are in the “Applicant Tracking” module and the “Initiator” (or “Search Committee Member”) user group.

2. Hover over “Postings” and select the appropriate employee group from the drop-down menu (for this example, “Admin” will be used).

3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.” This will provide a summary of the posting.
4. To review applicants, click on the “Applicants” tab.

5. Click on an applicant’s name to review all submitted application materials.

6. To export the applicant’s application and/or attached documents, click the “Document Type” or “Recreate PDF” at the bottom of the page. You can print these documents by using your PDF reader (“File,” “Print”).

**Change an Applicant Status**

1. Verify that you are in the “Applicant Tracking” module and the “Initiator” user group.
2. Hover over “Postings” and select the appropriate employee group from the drop-down menu.
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.”
4. Click on the “Applicants” tab.
5. Click the applicant’s name.
6. Click on “Take Action On Job Application” to the right of the screen and select the desired action. Confirm the status change when prompted.
7. Once an applicant has been moved to “Rank 2 (Meets Quals – Secondary Pool),” you may move again, if needed. However, once an applicant has been moved to either “Rank 3 (Meets Quals, No Longer Under Consideration)” or “Rank 4 (Dept Determined Does Not Meet Min Quals)” the status can be only be changed with assistance from your HR Partner. Setting an applicant to either “Rank 3” or “Rank 4” will also send out an automatic email to the applicant indicating that they are no longer under consideration.

**Change Status of Multiple Applicants**

1. Verify that you are in the “Applicant Tracking” module and the “Initiator” user group.
2. Hover over “Postings” and select the appropriate employee group from the drop-down menu.
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.”
4. Click on the “Applicants” tab.
5. Check the boxes to the left of the applicant names for whom you want to change the status.
6. Hover over the “Actions” button (the one at the top of the column).
7. Select “Move in Workflow” under the “Bulk” section of the drop-down menu.
8. In the “Change for all applicants” field, select the status change from the drop-down menu. Once the workflow status and reason is selected for all applicants, click “Save changes.”

9. You may also review information more in depth from the “Actions” drop-down menu by selecting one of the other options.
Create a Hiring Proposal

1. Verify that you are in the “Applicant Tracking” module and the “Initiator” user group.
2. Hover over “Postings” and select the appropriate employee group from the drop-down menu.
3. Search for and select the desired posting by clicking on either the “Position Number” or the “Working Title.”
4. Click on the “Applicants” tab.
5. Click on the applicant’s name.
6. Change status of applicant to “Choose Candidate for Hire (move to Candidate of Choice)” and click on “Submit.”
7. Click the “Start Hiring Proposal” link.

8. The Position Description should automatically populate in the top left corner under “Selected Position Description.” Scroll to the bottom of the page and click.

9. Complete the required fields and click “Next” to move to the next page.
10. Once you complete all information you will be at the “Summary” page.

11. Once on the “Summary” page hover over and select an option from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”

12. A green bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.

13. To save this request and submit later, select “Keep working on this Hiring Proposal.”
Approve a (Position Description) Request

1. Verify that you are on the “Home” tab in either module and the appropriate approver user group.
2. Click the Requests link from the “Inbox.”
3. Locate and select the title of the position.
4. Selecting the title will take you to the “Summary Page” where you can make edits if necessary.
5. To take action on the request hover over Take Action On Request and make a selection from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
6. A green bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
7. To save this request and submit later, select “Keep Working on This Request.”

Typical Workflow (Routing) for Position Request
Approve a Hiring Proposal

1. Verify that you are on the “Home” tab in either module and the appropriate approver user group.
2. Click the **Hiring Proposals (0)** link from the “Inbox.”
3. Locate and select the title of the position.
4. Selecting the title will take you to the “Summary Page” where you can make edits if necessary.
5. To take action on the request hover over **Take Action On Hiring Proposal** and make a selection from the drop-down menu. You will have the opportunity to add comments to the request and to add the request to your “Watch List.”
6. A green bar at the top of the page indicates the action was submitted successfully; a red bar indicates that further action is needed.
7. To save this request and submit later, select “Keep Working on This Request.”
**Miscellaneous**

### Locate a Position Description Request

1. Verify that you are in the “Position Management” module (orange).
2. Check to see if the PD request is in your “Watch List” on the “Home” screen.
3. If it is not on your “Watch List,” hover over “Position Descriptions” and select the appropriate employee group requests from the drop-down menu.
4. Click on **More search options** next to the blank search box at the top of the screen.
5. Ensure that all options in the “Status” field are selected (hold down the “Shift” key and highlight all options).
6. Enter the Position Number or Working Title in the “Search” field and click on the blue **Search** button.
7. To identify who currently “owns” the request (who has to take action on the request) click on the “Position Number” and the current owner will be listed at the top of the summary page.
8. To view the full historical details of the request click on the “History” tab.

### Locate a Pending Hiring Proposals

1. Verify that you are in the “Applicant Tracking” module (blue).
2. Check to see if the hiring proposal is in your “Watch List” on the “Home” screen.
3. If it is not on your “Watch List,” hover over “Hiring Proposals” and select the appropriate employee group from the drop-down menu.
   - Click on **More search options** next to the blank search box at the top of the screen.
   - Ensure that all options in the “Status” field are selected (hold down the “Shift” key and highlight all options).
   - Enter the “Position Number” or the “Candidate Last Name” into the “Search” field and click on the blue **Search** button.
4. To identify who currently “owns” the hiring proposal (who has to take action on the hiring proposal) click on the “Position Number” and the current owner will be listed at the top of the summary page.
5. To view the full historical details of the hiring proposal click on the “History” tab.
Navigation

1. In addition to using the << Prev button, you may use your browser back arrow as needed.
2. Remember to hit the refresh button ⏪ to change your “User Group.”

Logout

1. The system will log you out after 60 minutes of inactivity. Pages are automatically saved as you progress from page to page. You may also click on Save if there is a risk that interruptions will cause you to lose the work you have done.
2. To logout of PeopleAdmin, click on “logout” in the upper right corner of the screen.

Reports

If you or your department needs a report created from the data in PeopleAdmin, please contact your HR Partner in the Office of Human Resources.

Training

1. For PeopleAdmin training opportunities, please refer to the Human Resources training website at https://sites.google.com/a/pdx.edu/training-development-hr/home
2. You may also contact your HR Partner in the Office of Human Resources to arrange for one-on-one and/or small group training sessions.