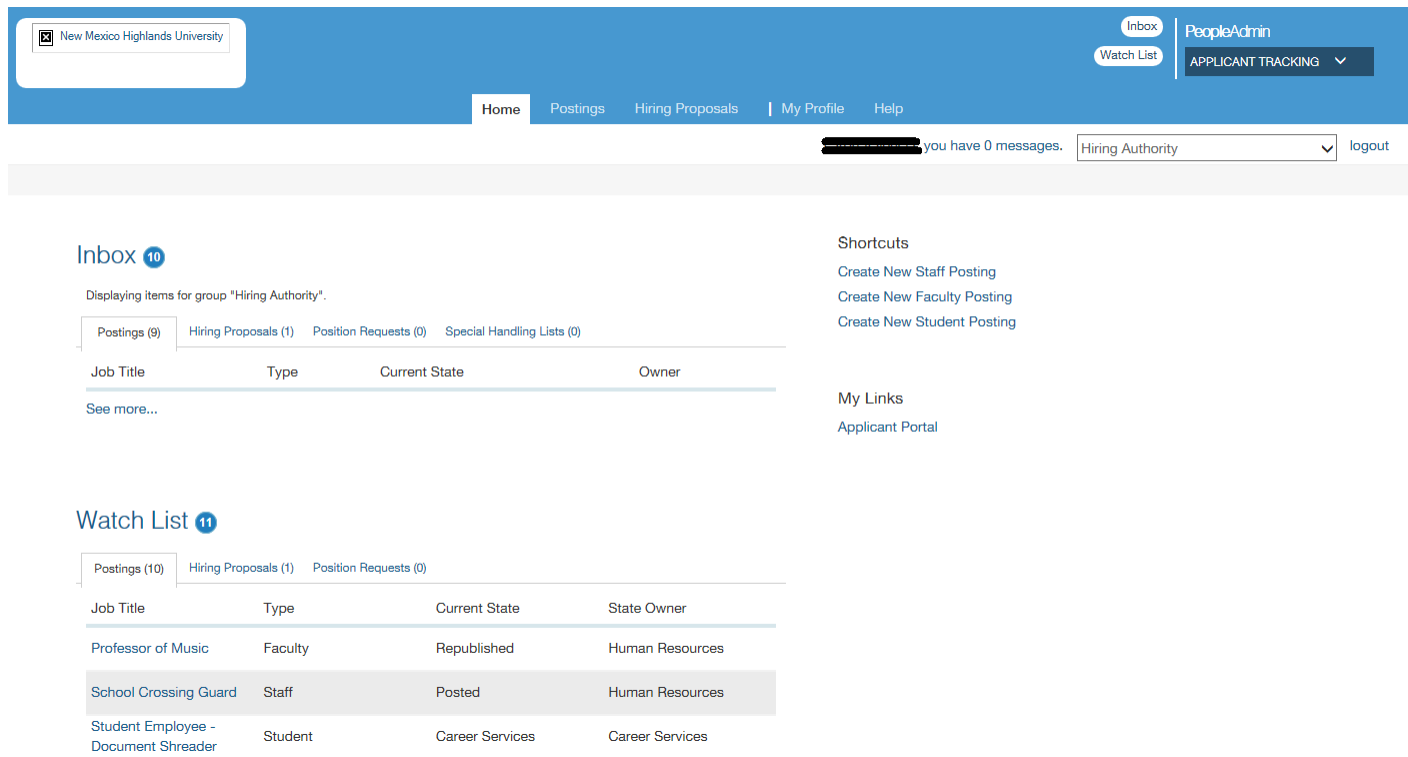# Online Recruiting System – PeopleAdmin 7
Faculty Employment Initiator Guide – Creating Faculty Postings and Hiring Proposals

General Login Process

► Click link: https://nmhu-sb.peopleadmin.com/hr/
► Select the "Online Recruiting System Login – Click Here" link and enter your credentials
► Default page upon log in is the Home page.

Ensure you are in the Hiring Authority role. If your role is not Hiring Authority, select the correct role from the drop down in the upper right corner of the screen.

CAUTION Clicking the Logout button by accident will log you out. The system will not give you a warning.

To begin a New Posting:

1. From the Main Menu, choose Posting, select Faculty – and select **Create New Posting**

OR make your selection from the "Shortcuts" menu on the right side of the screen and select "Create New Faculty Posting".

2. Next, select the type of faculty posting you wish to create. (See descriptions below).

Create New ✕

What would you like to use to create this new posting?

Create from Position Type
Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.

Create from Posting
Uses an existing posting as a template and automatically copies in most information.

Create from Posting Template
Copies in information from a Posting Template

You may create a Job Posting from one of three options ONLY:

Create from Position Type (Option 1): Allows you to create a position from scratch.

Create from Posting (Option 2): Copies in base classification information. Use this option when creating a unique **FACULTY** posting.

Create from Posting Template (Option 3): Allows you to clone (copy) an existing posting and make edits as needed. Use this option when creating a **FACULTY** posting for which you have already created a similar posting and need to make only minor edits. Good option when you recruit for similar positions frequently.

Create from Position Type – Option 1

1. You will be directed to the "New Posting" screen.

2. In the "New Posting" screen enter a descriptive and concise "Position Title" for the applicant posting. Drop down fields will allow you to select the Organizational Unit (Main Campus or Centers), Division and Department.

New Posting   **Create New Posting** **Cancel**

* Required Information

Position *   Lecturer - Chemistry

Organizational Unit

Branch *   Main Campus (Main Campus)

Division *   Dean Office -Arts and Sciences (11010)

Department *   Chemistry (11710)

3. "Applicant Workflow" will default to "Initiator/Search Chair Review."

4. Drop-down lists in the "references" section will allow you to customize when references requests will be sent out. In addition, once references have all been provided, you can select at which stage to move along the workflow state.

5. "Online Applications" will have a checkmark in the block as the system default. Applicants will be able to access the online jobs portal to search and apply to the posting.

6. Any special instructions regarding the job posting can be entered in the editable field; for example, in the student module, Career Services makes available their services to assist student job seekers with cover letters and/or resumes:

7. Click on "Create New Posting":

Online Applications

☑ Accept online applications?

Special offline application instructions

> For assistance in writing a cover letter and/or resume, please consult with the NMHU Career Services Center in the Felix Martinez Building, Room 230, (505) 454-3048

Supporting Documents

☐ Allow supporting documents to be uploaded to applications?

Create New Posting   Cancel

Create from Posting – Option 2

1. The system will default a list of approved Faculty postings.

Faculty Postings

To add a new column to the search results, select the column from the drop down list.

Saved Searches ⌄ | | Search | Q More Search Options ⌄

Faculty Postings ✕

"Faculty Postings" **14** Selected records **0** ✕ Clear selection?

Position	Posting Number	Department	Active Applications	Workflow State	Created Date	(Actions)
Faculty Test	F11P	Cross Country (61060)	1	Posted	August 30, 2017 at 11:15 AM	Actions ⌄
Tenured Faculty	F12P	Cross Country (61060)	0	Posted	September 05, 2017 at 01:19 PM	Actions ⌄
Assistant/Associate Professor of Human Resources	F20P	Human Resources/Payroll (51300)	1	Closed	September 05, 2017 at 01:24 PM	Actions ⌄
Assistant Biology Faculty	F14P	Office of the Provost Dept. (10100-1)	2	Closed	September 05, 2017 at 01:26 PM	Actions ⌄

2. To **view** the posting, open it by clicking on the Position Title or by clicking on the Actions link at the right of the Position and selecting View.

3. To Create Posting from the Position Title, choose "Create From" from the Actions link **or,** "Create Posting from this Position" after selecting View from the Actions link.

Postings / Faculty / Professor of Entomology (Posted) / Summary   Search Results: Pre

📄 Posting: **Professor of Entomology (Faculty)**
Current Status: Posted

Position Type: **Faculty**   Created by: **Faron Valencia**
Department: **Biology (11610)**   Owner: **Human Resources**

Summary

➕ Create Posting from this Posting ⬅

4. A New Posting page will appear for general settings information. Enter an "x" in the Job Title field as you copy the Position Title to this field on the next page. Complete each field as appropriate except for the "References" section as it does not apply to Student positions. Ensure the "Accept online applications?" checkbox is checked.

* Required Information

Job Title *   x

Organizational Unit

Business Center *

Department *

Applicant Workflow

Workflow State   Under Review by Unit/Committee

When an application is submitted for this job, it should move to which state in the Candidate Process workflow?

References

Reference Notification

Request References to submit Recommendations when candidate reaches selected workflow state?

Recommendation Workflow

When all Recommendations have been provided, move to selected workflow state?

Recommendation Document Type   No Document

Allow a document upload when a reference provider submits a Recommendation?

Online Applications

☑ Accept online applications?

Special offline application instructions

Create New Posting   Cancel

5. When done, click on   Create New Posting   to continue the posting and move to the next section.

Create from Posting – Option 3

1. Search for previous posting using information given on the Faculty Posting from Templates.

Faculty Posting Templates

To add a new column to the search results, select the column from the drop down list.

Saved Searches ⌄   [   ]   Search   🔍 More Search Options ⌄

Faculty Posting Templates   ✖

2. Select the posting you wish to clone (copy). You can then view the posting to ensure this is the correct posting to clone.
3. Once you select the template, click on "Create Posting from this Posting"

4. A New Posting page will appear for general settings information. The text fields will be pre-populated with the information from the cloned posting.

5. When done, click on Create New Posting to continue the posting and move to the next section.

Create/Update/Complete Posting Details

1. The menu at the top left directs the information you will supply to complete the Posting. You may navigate to each section by selecting the category of information or clicking on the Next button:

Editing Posting Position Details ✔ Budget Information ✔ Reference Collection ✔ Supplemental Questions ✔ Documents Needed to Apply ✔ Search Committee ✔ Evaluative Criteria Summary	***Position Details**** – You will need to complete all applicable fields in the position details section, including the General Position Information, Position Summary, Position Duties, Qualifications, etc. ***Budget Information*** – New budget summary page is where FOAP record is created. ***Reference Collection*** – Special instructions regarding references. ***Supplemental Questions*** – Add questions that refine the list of qualified applicants. Questions will be reviewed and approved by your HR team. ***Documents Needed to Apply*** – Choose required or optional documents for applicants to attach during the application process. ***Search Committee*** – Search Committee members can be assigned and given accounts to access management of the hiring action. ***Evaluative Criteria*** – Assign criterion and weight to metric in candidate evaluation. ***Summary*** – Posting details summarized on one screen.

POSTING POSITION
Replacement or New Position? [required field – name of replacement required if applicable]
POSITION INFORMATION
Position: Auto-Populates to appropriate faculty position title based on classification selected
Full Time/Part Time: Select full time or part time
Rank: Select the appropriate title from list of values
Tenure Track: Select the appropriate choice from list of values
FTE: Select the appropriate choice from list of values
Target Starting Salary: Select the appropriate choice from list of values
Position Summary: General description of the position and anything else deemed appropriate for the posting.

Duties and Responsibilities: Duties and responsibilities unique to the specific posting.	
Minimum Qualifications: Specific requirements for the position (education, experience).	
Preferred Qualifications: Add preferred qualifications as appropriate for the position.	
Knowledge, Skills, and Abilities: KSA's that are desired with this job posting.	
Work Location/Campus Center: Drop-down menu provides the option to select location of position.	

POSTING DETAIL INFORMATION

Posting Number: Assigned and will auto-populate when forwarded to the Faculty Employment Approver.
Number of Vacancies: Enter the number of positions being recruited for – if a pool you may enter a range.
Desired Start Date: enter date as appropriate
Position End Date (if temporary): enter date as appropriate
Applicant Reviewer/Search Chair/Supervisors: Define which applicant reviewer(s) need access to this posting.
Open Date: Date the posting will become active
Review Start Date: Date the search committee will begin review of applicants
Close Date: Date the posting will end
Open Until Filled: If selected, position will remain open until filled
Special Instructions to Applicant: Available field to communicate any specific instructions to prospective applicants
Quick Link for Internal Postings: Auto-populated link to enable faculty posting to be advertised internally (not available for public on main applicant website portal).

ADVERTISING

Advertising Sources: Select the desired advertisement medium to broadcast the posting
Advertising Text: Enter test desired to run through advertisement sources
Send to HERC: Select Yes or No
HERC Category: Select desired outlets to advertise through HERC medium

ORGANIZATION INFORMATION

Organizational Unit: Default setting from posting creation

NEW BUDGET SUMMARY

Position Number(s): If this is a new position request please type "Request New Position". If the Position number is unknown please type "Unknown" into the field.
Fund: Select the appropriate choice from list of values
Org: Select the appropriate choice from list of values
Account: Select the appropriate choice from list of values
Program: Select the appropriate choice from list of values
Percentage Funded: Enter the appropriate value – new budget summary entry can be created in the event of multiple FOAP's.
Restricted/Unrestricted? Select the appropriate choice from the list of values

REFERENCE COLLECTION

Minimum Requests: Minimum number of references that will be solicited for this posting
Maximum requests: Maximum number of references that will be solicited for this posting
Provider Special Instructions: Any special instructions for the position reference to the respondent
Confirmation Message to Provider: Message that will be sent via email as confirmation of receipt for the position reference

SUPPLEMENTAL QUESTIONS (As Applicable)
This section is where you will create the Supplemental Questions (SQs) that applicants will respond to when applying to the posting. A question data-bank is provided with an assortment of commonly asked questions. However, you have an option to create your own questions for the posting. These questions can refine the list of qualified applicants and be exported to sort, filter and create reports. Step by step instructions are included within the system. Questions will be reviewed and approved by your HR/PR team.
DOCUMENTS NEEDED TO APPLY (As Applicable)
Choose required or optional documents for applicants to attach during the application process.
SEARCH COMMITTEE
Assign search committee members and assign new members to search. By clicking on "Create New User Account" the system will automatically generate a Search Committee Username; you may update the password if needed. An email will be sent to the search committee member with username/password for the posting.
EVALUATIVE CRITERIA
Assign criterion and weight to metric in candidate evaluation
SUMMARY
Displays details about the posting
HISTORY
Displays all transactions associated with the Posting, when it was created, any actions, notes or distributed emails time in status, who prepared the action, time and date stamp. As the number of transactions grows, History may be filtered by clicking on the boxes for Workflow, Notes and Emails. The "Add a new note" option is where you would add any comments you would like noted in the history of the posting or as communication to the Faculty Search Committee. Your name, role, date and time are automatically added to each note.
SETTINGS
Display the organizational structure for the job posting and online application information.
HIRING PROPOSALS
Displays as job offers are made and prospective new hire information is created.

Other Actions: There are additional actions which may be taken by the user. These include:

Edit your posting to include additional or modified information. You may also navigate to each section of the posting where an Edit link is available by topic

Delete your posting if created in error. This option is only given prior to moving the posting in the workflow

Take Action on Posting (discussed below) to move the posting through the workflow and approval process

See How Posting looks to Applicant to see a preview for how the posting will look in the Applicant Portal

Print Preview (Applicant View) allows you to print the Preview for how the posting will look in the Applicant Portal

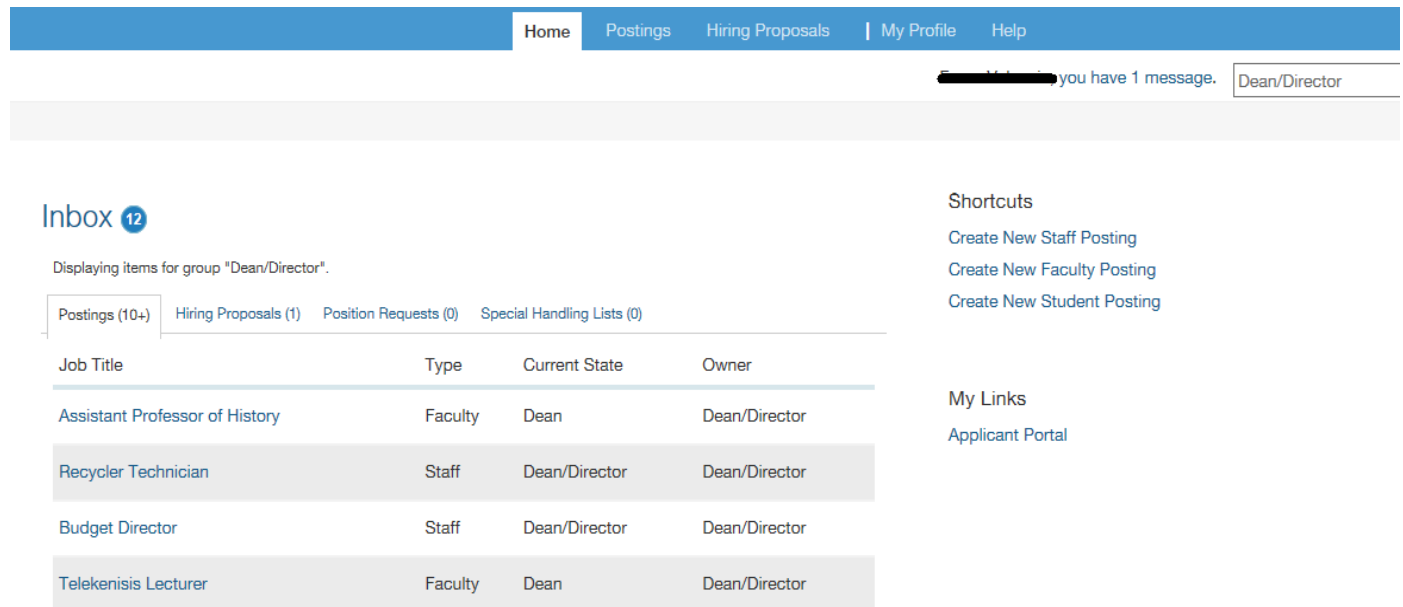*Print Preview* allows you to print the Preview for how the posting appears on screen

After creating the job posting record (*Telekinesis Lecturer*), the Hiring Authority will go the "Take Action on Posting" tab and submit the posting for review to the **Dean/Director**.

Take Action on Posting

- <u>Keep Working on this Posting</u>
  WORKFLOW ACTIONS
- Cancel (Move to Cancelled)
- Submit (Move to Hiring Authority)
- Submit for Review (Move to Dean)

The Dean/Director will then log into PeopleAdmin and will have a notification in his/her Inbox from the Home Page.

| Home | Postings | Hiring Proposals | | My Profile | Help |

you have 1 message.   Dean/Director

Inbox 12

Displaying items for group "Dean/Director".

| Postings (10+) | Hiring Proposals (1) | Position Requests (0) | Special Handling Lists (0) |

Job Title	Type	Current State	Owner
Assistant Professor of History	Faculty	Dean	Dean/Director
Recycler Technician	Staff	Dean/Director	Dean/Director
Budget Director	Staff	Dean/Director	Dean/Director
Telekenisis Lecturer	Faculty	Dean	Dean/Director

Shortcuts

Create New Staff Posting
Create New Faculty Posting
Create New Student Posting

My Links

Applicant Portal

The Dean/Director then has the option to review the posting and either return it back to the Hiring Authority for review or approve the posting and move it forward to the appropriate office or department (depending on position and also funding source). A list of options for the Dean/Director is presented below:

Take Action on Posting

- Keep Working on this Posting
  WORKFLOW ACTIONS
- Return for Review (Move to Hiring Authority)
- Approve (Move to Vice President)
- Submit to President (Move to President)
- Submit Directly to Budget (Move to Budget)
- Submit (GRANTS ONLY) (Move to Office of Research and Sponsored Projects)

In the example below, the Dean selects to approve the posting and move to **Vice President**. The Vice President will then log into PeopleAdmin and will have a notification in his/her Inbox from the Home Page.

		Home	Postings	Hiring Proposals		My Profile	Help

you have 1 message. Vice President

Shortcuts

Inbox 12

Displaying items for group "Vice President".

Postings (10+)	Hiring Proposals (1)	Position Requests (0)	Special Handling Lists (0)

Job Title	Type	Current State	Owner
Telekenisis Lecturer	Faculty	Vice President	Vice President

My Links
Applicant Portal

The Vice President selects the posting to review and can either edit the record or take action on posting. The Vice President selects from the following list in the "Take Action on Posting" tab:

Take Action on Posting

- Keep Working on this Posting
  WORKFLOW ACTIONS
- Approve (Move to President)
- Return for Review (Move to Dean)
- Submit Directly to Budget (Move to Budget)

If the posting is good the Vice President would then select to move the posting to either the Budget Office or the President. In this example, the Vice President elects to send this posting to the **President**.

The President will now be able to access and review the job posting for the faculty position. The President will take action on the posting with the following options:

Take Action on Posting

- Keep Working on this Posting
  WORKFLOW ACTIONS
- Return for Review (Move to Vice President)
- Approve/Submit (Move to Budget)
- Return to Dean (Move to Dean)

In this scenario, the President elects to approve the faculty posting and moves it to the **Budget Office**. When the Budget Office logs into People Admin they will be able to access the record for the position and enter any edits that may be required.

The Budget Office will verify funding source for posting and will enter a note in the history tab to indicate either review of the posting or any special notes concerning funding sources (if applicable). An example of the note and history tab entry will reflect as follows:

The Budget Office would then take action on the posting:

Take Action on Posting

- Keep Working on this Posting
  WORKFLOW ACTIONS
- Approve/Submit (Move to HR Final Review)
- Return for Revision (Move to President)
- Return to Vice President (Move to Vice President)
- Return to Dean (Move to Dean)

The Budget Office approves the faculty posting and submits to **HR** for final review. When HR/PR receives the faculty posting HR will create a posting template from the posting if one does not already exist. This feature will provide the means to duplicate the posting if it is needed in the future without having to re-invent the process for the position. Once HR/PR determines that the posting has been finalized and that all required endorsements are recorded for the posting HR will take action on the posting. Many options are presented for HR/PR in the next steps:

Take Action on Posting

- Keep Working on this Hiring Proposal
  WORKFLOW ACTIONS
- Approve for Later Posting (Move to Approved-Pending)
- Post (Move to Posted)
- Cancel (Move to Canceled)
- Post Internally (Move to Approved - Internally)
  MOVE DIRECTLY TO
- Draft
- Hiring Authority
- Dean
- Vice President
- Budget
- Office of Research and Sponsored Projects
- Approved-Pending
- Posted
- Approved – Internal
- Closed
- Filled
- Republished
- Extended Posting
- Canceled

If the posting is to be advertised internally, HR/PR will move to Post Internally. HR/PR can also approve for a later date, post the position, cancel or move the posting directly to a previous office or administrative file. For our scenario, HR/PR decides to approve for Later Posting to coincide with the desired posting date in the future.

Once the position is posted, the applicant will then be able to access the online applicant website to search for and apply for job postings. The search committee will then be able to log in to PeopleAdmin and screen applicants. The search committee will then carry out the search charge and follow through with the applicant selection process.

If the position was posted internally, a web link will be provided to send to an interested applicant. When they enter the link it will take them directly to the job posting on the applicant portal for them to apply to the posting. If the posting is public, anyone that access the applicant portal will be able to view and apply for the posting.

After the applicant applies for the job posting the application is automatically entered on the job posting. In the example below, "John Doe" has applied for the faculty position of "Telekinesis Lecturer" through the applicant portal. The Search Committee will then access PeopleAdmin, bring up the posting and open the "Applicants" tab.

The Search Chair/Committee will then pick up the faculty application and review the record to determine if the applicant meets the basic qualifications for the posting. If the applicant does not meet the basic criteria for consideration, the Search Committee has the option of selecting "Select (Move to Not Interviewed, Not Hired)" on the Take Action on Job Application tab.

While under review, the Search Committee can also enter notes that become part of the application that appear in the History tab. The Search Chair/Committee will then carry out the search charge for the faculty posting.

When the Search Chair/Committee determines to take action on the Job Application the menu will allow the following transactions:

Take Action on Job Application

- Keep Working on this Job Application
  WORKFLOW ACTIONS
- Select (Move to Not Interviewed, Not Hired)
- Select (Move to Qualify/Rank/Evaluative Criteria)
- Select (Move to (Semi Finalists) Phone Interview)
- Select (Move to Request for Campus Interview)
- Select (Move to Interviewed, Not Hired)

Depending on the criteria of the search charge, the Search Chair/Committee can move the applicant through the candidate screening process to include evaluative criteria, semi-finalist (phone interview), on-campus interview or interview, not hired.

If a candidate is selected for an interview an email will be sent to the candidate informing them that they have been selected as a finalist for the position of _____ and they will also receive a link to download and fill out the Criminal Conviction Form.

The application then moves to the **Vice President**. The Vice President will then review the candidate file and then take action on the Job Application.

Take Action on Job Application

- Keep Working on this Job Application
  WORKFLOW ACTIONS
- Send to Repost (Tenure Info Change (Move to Repost Tenure Info Changed)
- Approved for Interview (Move to Interview Approved/Finalist)
- Not approved for Interview (Move to Not Interviewed, Not Hired)

In the training scenario provided, the Vice President approves the Job Application and selects "Approve for Interview (Move to Interview Approved/Finalist). The Job Application would then go back to the **Search Chair/Committee** for follow-up with the candidate interview.

Upon conclusion of the on-campus interview, the Search Chair/Committee will then select appropriate action for the Job Application:

Take Action on Job Application

- Keep Working on this Job Application
  WORKFLOW ACTIONS
- Recommend for Hire (Move to Recommend for Hire)
- Tenure Information Changed (email now) (Move to Repost Tenure Info Changed)
- Not Selected (Move to Interviewed, Not Hired)

Provided that the candidate interview went well, the Search Committee will deliberate on the interviews and decide to make a recommendation for hire.

Take Action on Job Application

⭐ View Posting Applied To
⭐ Preview Application
➕ Start ATS Hiring Proposal

To Begin a New Hiring Proposal:

Postings / ... / Applicant Review / John Doe (Recommend for Hire) / New Hiring Proposal

Starting Hiring Proposal

Applicant: John Doe

Posting: Telekenisis Lecturer

Start Hiring Proposal   or Cancel

The Hiring Proposal through PeopleAdmin replaces the PA-1 (paper) method of hiring new employees. All Offices and Departments involved in the hiring process will need to have access to PeopleAdmin and permissions assigned to execute their duties and roles in moving hiring proposals through the system. Once finalized, HR/PR will process the hiring proposal and verify all endorsements have been recorded and any applicable notes or data edits are complete before completing the record and beginning the employee onboard module.

When a new Hiring Proposal is created, many of the fields are pre-filled from the job posting. The **Search Chair/Committee** will then ensure completion of the following sections:

- Hiring Proposal Information:
    - Candidate will be Hired into the Following Position Number (if unknown type "unknown")
    - Reason for Selection of Candidate
    - Recommended Starting Salary
    - Proposed Start Date
    - Is Background Check Required? (Yes or No)
    - Please Provide any Background Check Detail (as applicable)

The Hiring Authority or Search Chair/Committee may enter the Budget Authorization Information if available. However, the Budget Office and HR/PR will have a chance to enter and edit this record if needed.

Once the Hiring Proposal is generated the Search Chair/Committee can take action on the proposal and move it to the **Hiring Authority**.

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal
  WORKFLOW ACTIONS
- Submit (Move to Hiring Authority)

The Hiring Authority can then forward the proposal to the **Dean/Director** for endorsement. The Dean/Director will then be able to take action on the Hiring Proposal:

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal
  WORKFLOW ACTIONS
- Return for Review (Move to Hiring Authority)
- Approve (Move to Vice President)
- Submit to President (Move to President)
- Submit Directly to Budget (Move to Budget)
- Submit (GRANTS ONLY) (Move to Office of Research and Sponsored Projects)

In this example the Dean/Director reviews the Hiring Proposal and approves. The Dean/Director takes action on the Hiring Proposal and moves it to **Vice President**.

The Vice President would then review the Hiring Proposal and take action by moving it to the **Budget Office.**

Take Action on Hiring Proposal
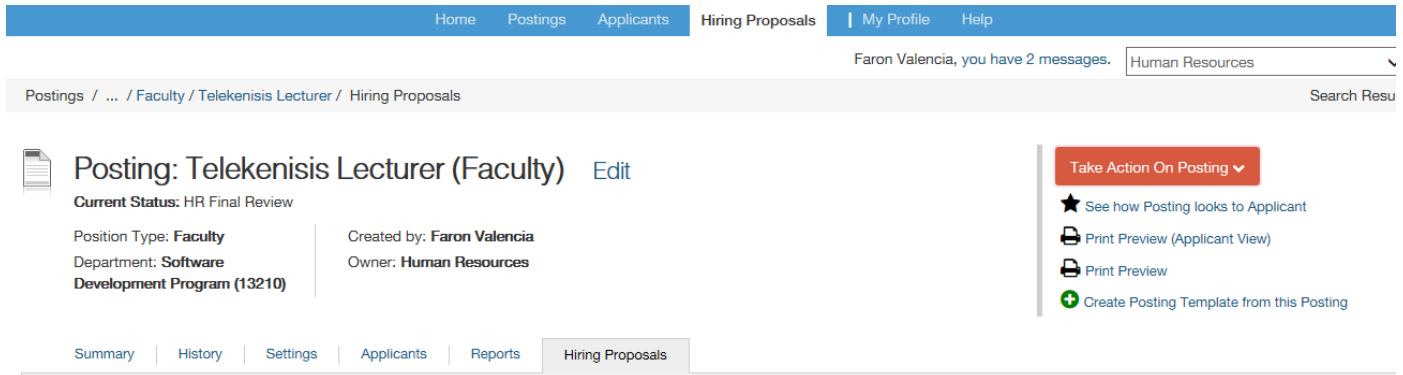
- Keep Working on this Hiring Proposal
  WORKFLOW ACTIONS
- Approve (Move to President)
- Return (Move to Dean)
- Submit Directly to Budget (Move to Budget)

The Budget Office would review the hiring proposal and verify the FOAP data. When approved the Budget Office has several options to take action with, depending on what is required. In this example, the Budget Office forwards the Hiring Proposal to **Human Resources/Payroll** for final review.

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal
  WORKFLOW ACTIONS
- Approve/Submit (Move to HR Final Review)
- Return for Revision (Move to President)
- Return to Vice President (Move to Vice President)
- Return to Dean (Move to Dean)

In the example below, the proposal was approved and forwarded to **Human Resources/Payroll**. HR/PR will then verify that all data entry fields are complete and valid before taking action on the proposal.

| | Home | Postings | Applicants | **Hiring Proposals** | | My Profile | Help |

Faron Valencia, you have 2 messages.   Human Resources

Postings / ... / Faculty / Telekenisis Lecturer / Hiring Proposals   Search Resu

📄 Posting: Telekenisis Lecturer (Faculty) Edit

Current Status: HR Final Review

Position Type: **Faculty**   Created by: **Faron Valencia**
Department: **Software**   Owner: **Human Resources**
Development Program (13210)

Take Action On Posting ⌄
⭐ See how Posting looks to Applicant
🖶 Print Preview (Applicant View)
🖶 Print Preview
➕ Create Posting Template from this Posting

Summary | History | Settings | Applicants | Reports | **Hiring Proposals**

From here, HR/PR can take a wide variety of action to either send back for more edits, cancel the record, or approve and finalize the hire.

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal
  WORKFLOW ACTIONS
- Cancel (Move to Canceled)
- Approve and Finalize Hire (Move to Hire Approved)
- Return (Move to President)
  MOVE DIRECTLY TO
- Draft
- Search Chair
- Hiring Authority
- Dean
- Vice President
- President
- Hire Approved
- Canceled

Once the proposal is approved and moved to Hire Approved, the "Take Action on Hiring Proposal" tab disappears and the Onboarding event tab appears.

🖨 Print Preview

➕ Create Onboarding Event

HR/PR will now create an onboarding event for the new faculty employee that will contain a list of tasks and forms for the employee and supervisor to complete. All forms will be electronically signed and loaded in the onboard module as part of the permanent employee file.

IF you should have any questions on creating and processing student postings and hiring proposals please contact HR/PR – we are happy to assist.