Oregon TECH
Human Resources

Hootie's Employee Recruitment, Onboarding, & Exiting System (HEROES)

Position Descriptions, Postings, and Hiring Proposals

Dean/VP User Guide

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Introduction

Welcome to Oregon Tech's HEROES software. The system has been implemented in order to improve and digitize tasks involved in the position management, recruitment, employment applications, hiring, onboarding, and exiting processes.

Tasks Available in HEROES*:

- Create new position descriptions
- View and modify existing position descriptions
- View pending position requests
- Initiate and view postings
- View and print application materials
- Approve position, recruitment, and hiring actions
- Obtain budgetary approval on position, recruitment, and hiring actions

*dependent upon assigned role and department

Best Web Browsers to Use

HEROES, hosted by PeopleAdmin, is designed to run in a web browser over the Internet. The system works best in Chrome but supports browser versions of Firefox current (auto update), Internet Explorer 8, 9, 10 and Safari 6.0.

The site also requires users to have Adobe Acrobat Reader installed. Please contact Information Technology Services (ITS) at 541.885.1470 for assistance if you do not already have this software.

Security of Information / Applicant Data

To ensure the security of the data provided by applicants, the system will automatically log users out after 3 hours of no activity. However, anytime a user leaves their computer it is strongly recommend that they save any work in progress and log out of the system by clicking on the Logout link located in the top right hand corner of the screen.

System Questions

User guides and quick reference documents related to HEREOS are located on the Human Resources Systems page.

Users are also welcome to contact the Office of Human Resources for assistance:

541.885.1120
oithr@oit.edu

User Expectations

Users of Oregon Tech's HEROES may have access to information related to applicants, current employees, and current employee position information. Users are responsible for respecting the confidentiality of information accessed via computer information systems and understand that this information is to be used only for official university purposes.

Users shall not provide or release this information to any individual or organization except for the sole purpose of conducting university business within the requirements of their position. Users understand that they will use this system in accordance with university policies and understand that any misuse or inappropriate disclosure of such information could result in in termination of employment or other disciplinary actions.

Users are responsible for safeguarding HEROES login credentials. Users will not share credentials with others and are expected to store credentials in a secure location. Information Technology Services should be contacted immediately if there is any suspicion that credentials have been compromised.

Logging Into HEROES

1. Log in to TECHweb.
2. Click on the Faculty/Staff link.
3. Click on the Human Resources menu item.
4. Click on the HEREOS menu item.

You may be prompted to enter your Oregon Tech username and password again. If you are, please do so.

If you are directed to a screen with a black background, click on the link titled SSO Authentication located under the Log In button. This will redirect you to an Oregon Tech login portal. A quick reference for troubleshooting this is located on the Human Resources Systems page.

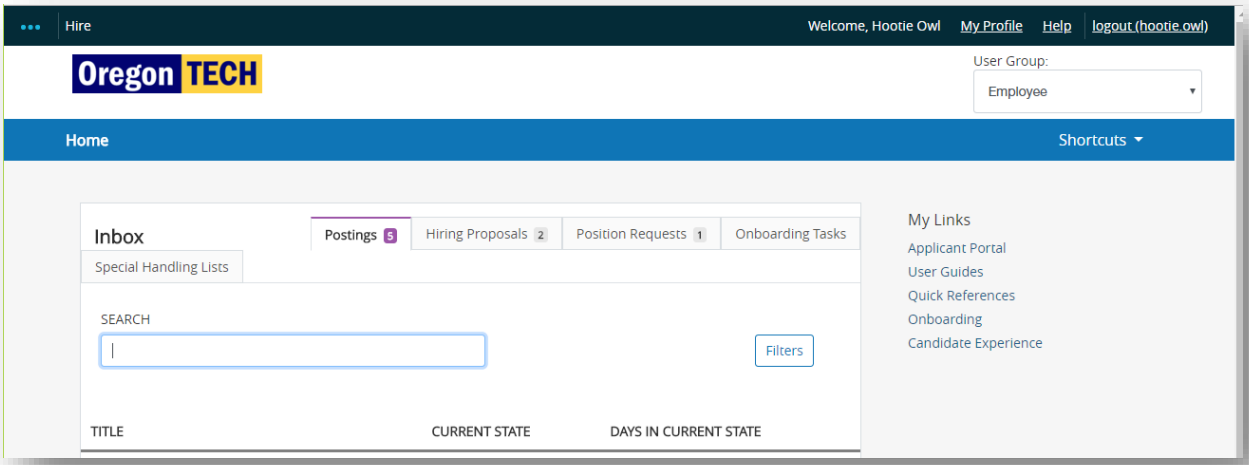
If you experience any issues with the login, please call 541.885.1120.

HEROES Navigation Essentials & System Terminology

Key system terms are bolded.

The Home Page

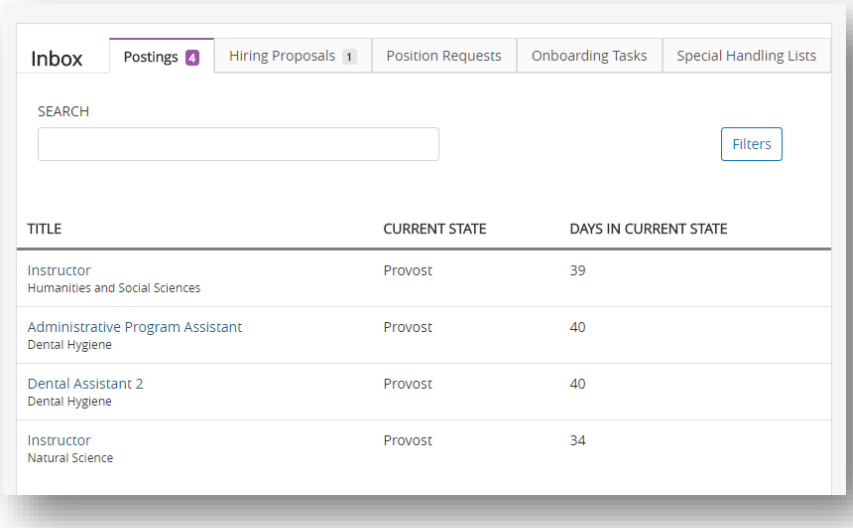
This is the page you see when you log in.



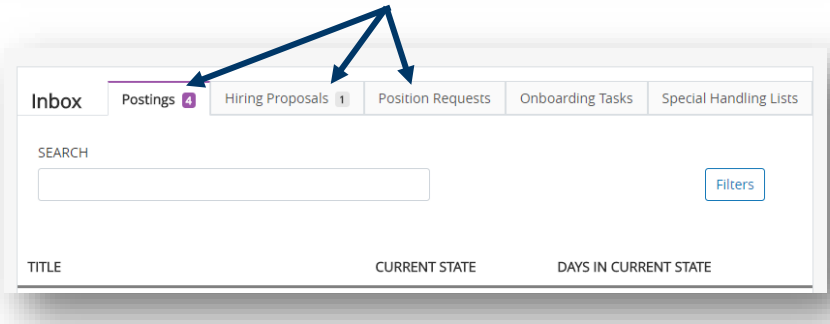
It presents a dashboard that provides access to:

Summary views of your Inbox and Watch List.

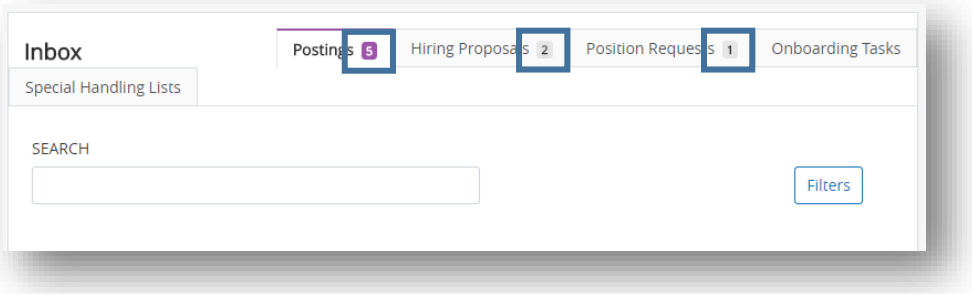
The **Inbox** presents within the system that are in your queue. These tasks include all items that you are authorized to act on.



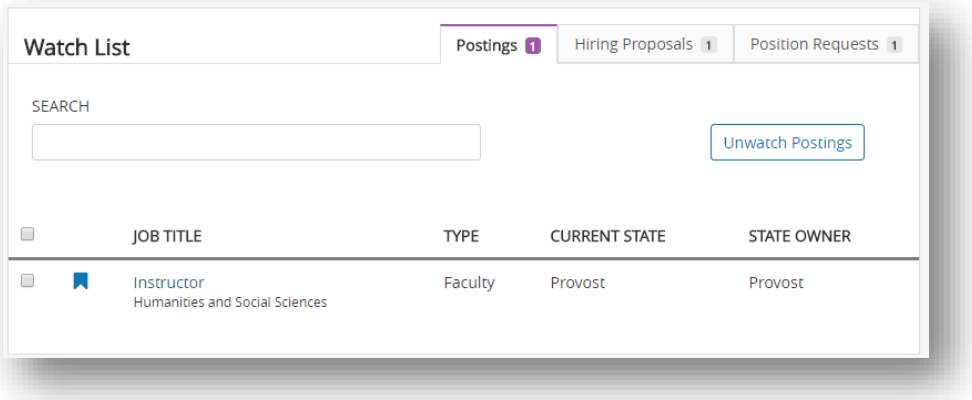
- Navigate between the three main Inbox tabs by clicking on the tab names.



- The number next to each tab title indicates how many items are active within the specific workflow for your department.

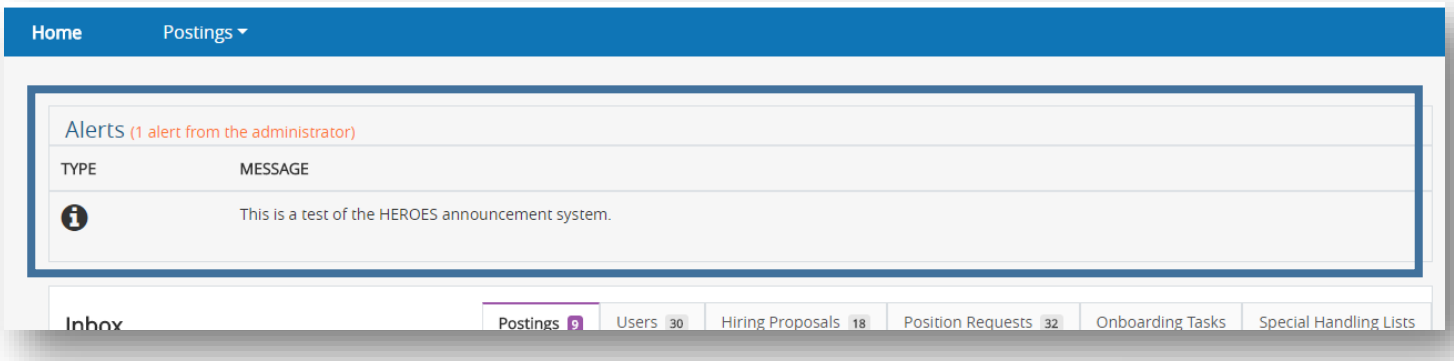


- The **Watch List** allows you to follow the progress of items for your department. The Watch List shows you where items are in the workflow. Items are automatically removed from your Watch List when they are completed or canceled



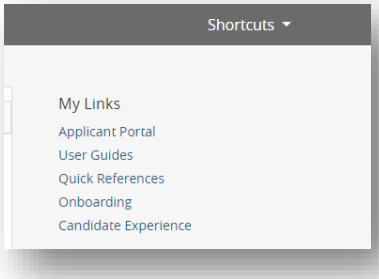
Alerts and Other Announcements

If there are any active **alerts** or **announcements** about HEROES, they will appear above the Inbox.



My Links

- **My Links** are set up by Oregon Tech HR and take you to Oregon Tech web pages that you may need to reference.



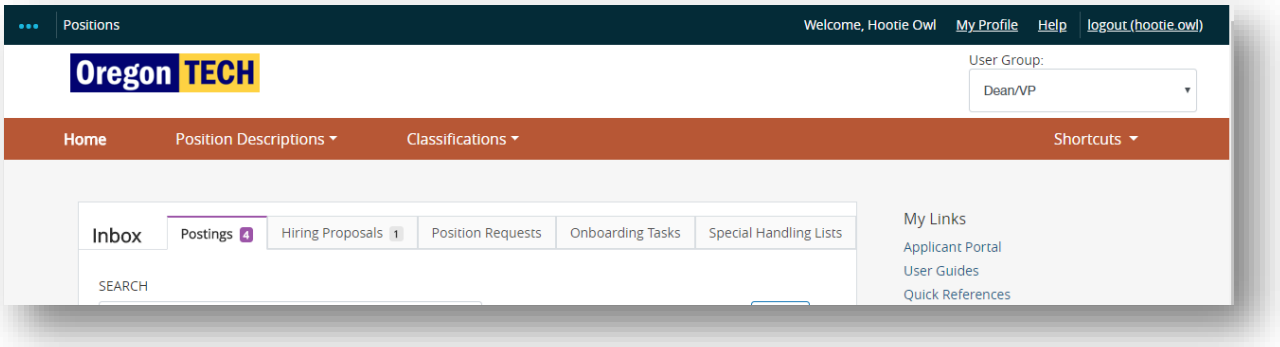
Modules

Modules are functional areas. HEROES is broken up into three modules:

- Positions (this is where position descriptions are housed)
- Hire (this is where recruitments are housed)
- Onboard (this is for new employee paperwork, resources, etc.)

Positions Module (Orange banner)

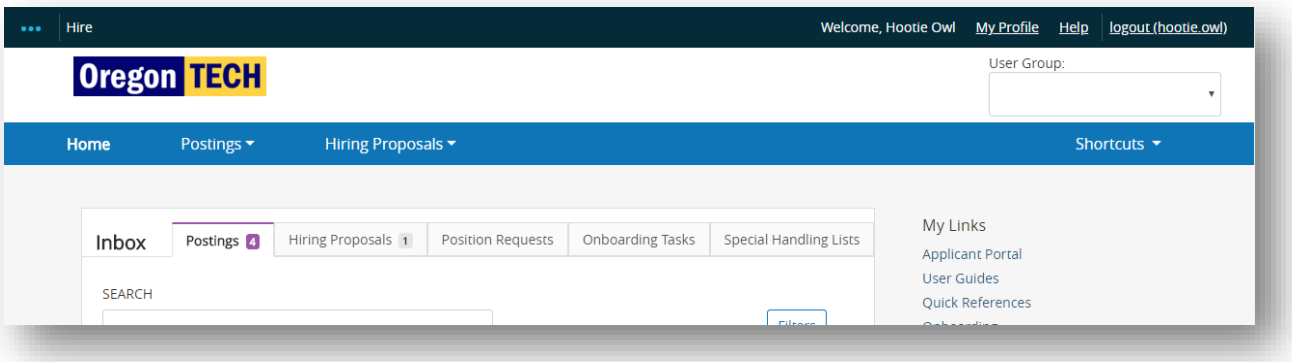
The **Positions module** gives the Department User or Department Head/Director role access to create new position descriptions and to view and/or modify existing position descriptions.



The initiation of a new position or modifying a current position creates a position request. A **position request** is the mechanism that accomplishes these tasks. Position requests carry a new or modified position description through the approval queue.

Hire Module (Blue banner)

The **Hire module** gives a department user or department head/chair role access to create and view postings, to create and view hiring proposals, and to view applicants.

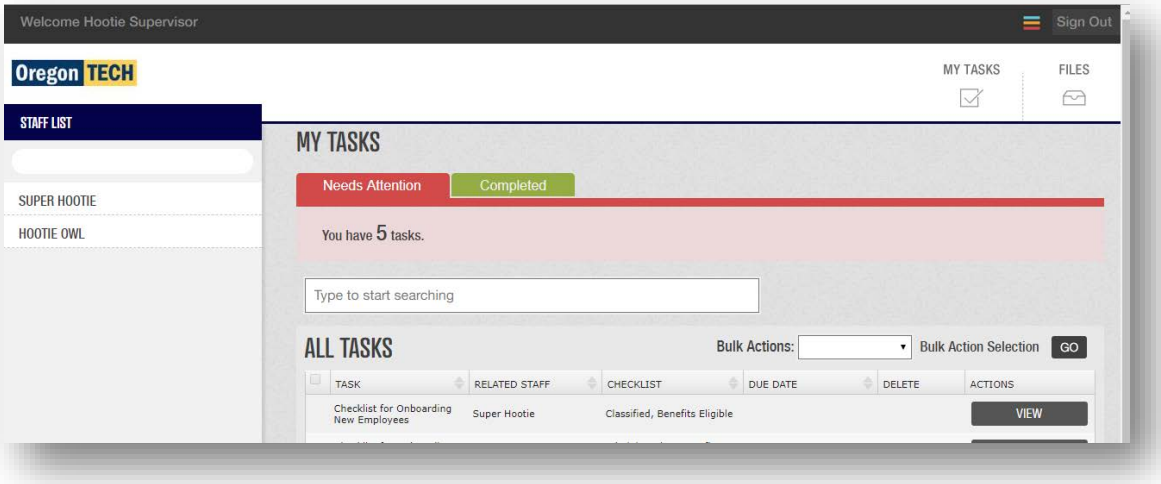


- **Postings** are announcements of job vacancies / job openings. Applicants apply to postings and HEROES gathers applications into one central location in the Hire module.
    - Postings are typically created from a position description once the position description has been finalized and approved.

- A **Hiring Proposal** carries an applicant and position information through the approval queue, connects a selected applicant to a position description, and connect a selected applicant the onboarding module.

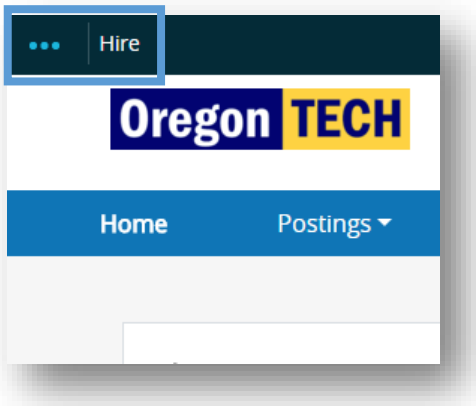
Onboard Module

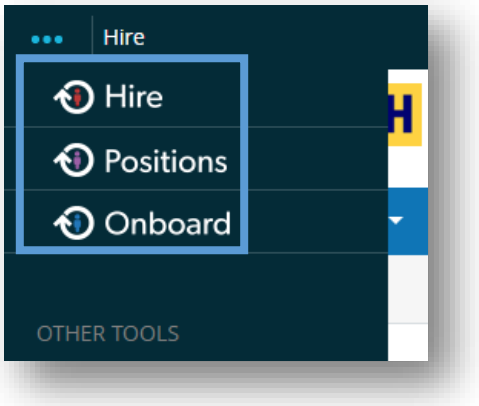
The **Onboard module** is used to onboard new employees and provide hiring managers with resources to assist with onboarding new employees.



Switching Between Modules

If you accidentally navigate away from a module, *click on the ellipses (…) and then click on* ***a module option****.*





Roles

Roles are collections of permissions, not groups of people. The HEROES roles are described in the table below.

Depending on your position at Oregon Tech, you may have access to multiple roles. If you cannot access the area where you need to work, check your current role and change if necessary.

Access limits have been established for each role. Each role's access is dependent upon the role's general access AND based on the department to which a user is assigned.

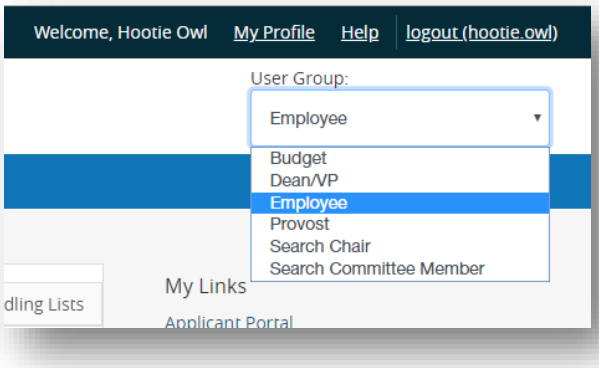
Role Definitions

Department User	The Department User role has access to items within their assigned department(s). The role can initiate new position descriptions, view or modify existing position descriptions, and view pending position requests for their department. Department users are able to initiate new and view current postings and hiring proposals for their department.
Department Chair/Director	The Department Chair/Director role provides departmental approval on position, recruitment, and hiring actions for all positions within their department. The role can initiate new position descriptions, view or modify existing position descriptions, and view pending position requests for their department. Department Chair/Director users are able to initiate new and view current postings and hiring proposals for their department.
Dean/VP	The Dean/VP role provides college/division approval on position, recruitment, and hiring actions for all positions within their college/division. Dean/VP users are able to view existing college/division position descriptions and pending position requests, postings, and hiring proposals.
Budget	The Budget role provides budgetary approval on position, recruitment, and hiring actions for all positions within their college/division. Budget users are able to view and approve pending position requests, postings, and hiring proposals.
Provost	The Provost role provides approvals on position, recruitment, and hiring actions for any position across the university as needed. The Provost role is able to view and approve pending position requests, postings, and hiring proposals.
Search Chair	Within an assigned search, the Search Chair role is able to view the recruitment's associated position description, view and print application materials, and change applicants' statuses and advance them to certain stages of the recruitment.
Search Members	Within an assigned search, the Search Committee Member role is able to view the recruitment's associated position description and view and print application materials.
President	The President role provides approval on position, recruitment, and hiring actions for all positions as needed. The President role is able to view and approve pending position requests, postings, and hiring proposals.
Human Resources	Has omnipotent access to all items across the university.
HR Admin	Has omnipotent access to all items across the university. Also has access to make changes to the HEROES system.

Switching Between Roles

To switch between roles, click on the role drop down list at the top right of your screen click on the role you need to use.

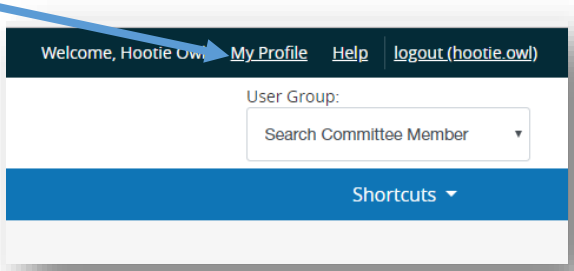
Your role list may be different than Hootie's in the screen shot above based on role(s) assigned to your position and your department(s).



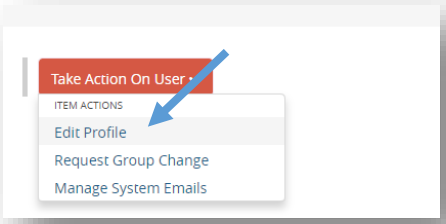
Setting Your Preferred Role and Module at Login

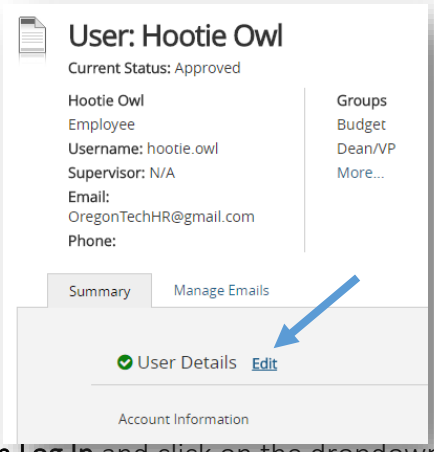
To set the system to default on log in to a particular role and/or module, follow these steps:

- Click on **My Profile** from the menu bar at the top of the screen.



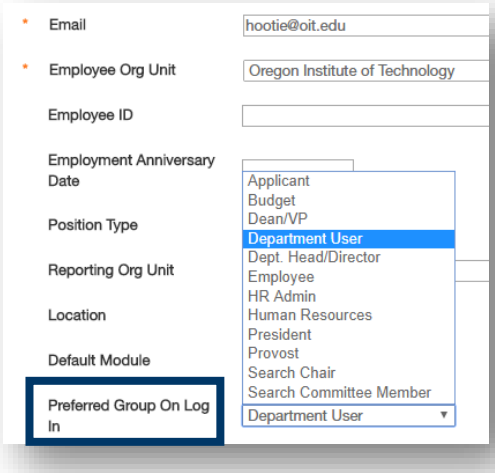
- Navigate to the **Take Action On User** button near the upper right corner and select **Edit Profile** OR click on **Edit** next to **User Details** in the tabbed section below the user information.



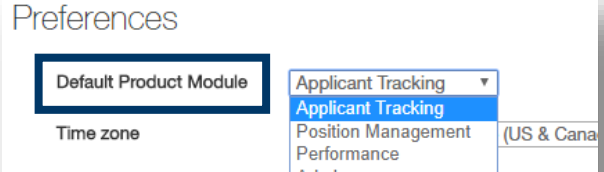


- Under Account Information, find **Preferred Group On Log In** and click on the dropdown to select the role you want to be logged into upon signing in.

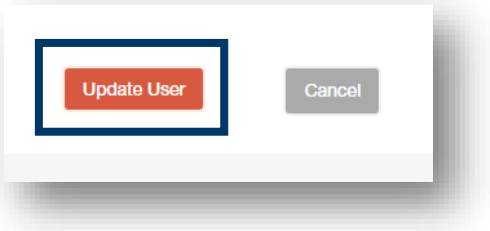
- Depending on your assigned role(s), your list may be different than Hootie's is in the screen shot below.



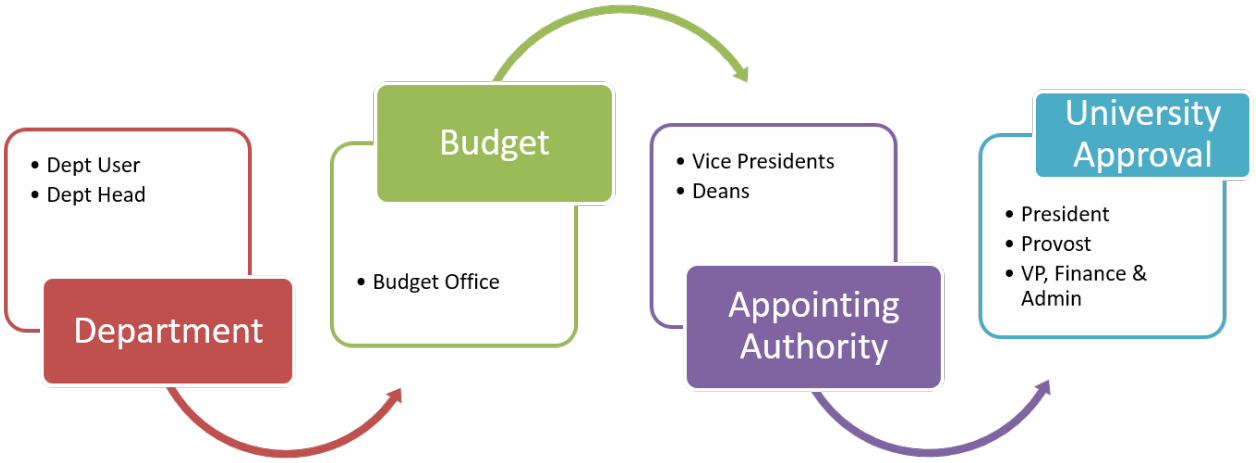
- Under Preferences, find **Default Product Module** and click on the dropdown to select the module you want to be automatically logged in to upon signing in.



- Click on **Update User** button on the right side of the screen (top and bottom of the page) to save the changes.



HEROES Workflow – for Position Descriptions, Postings, and Hiring Proposals

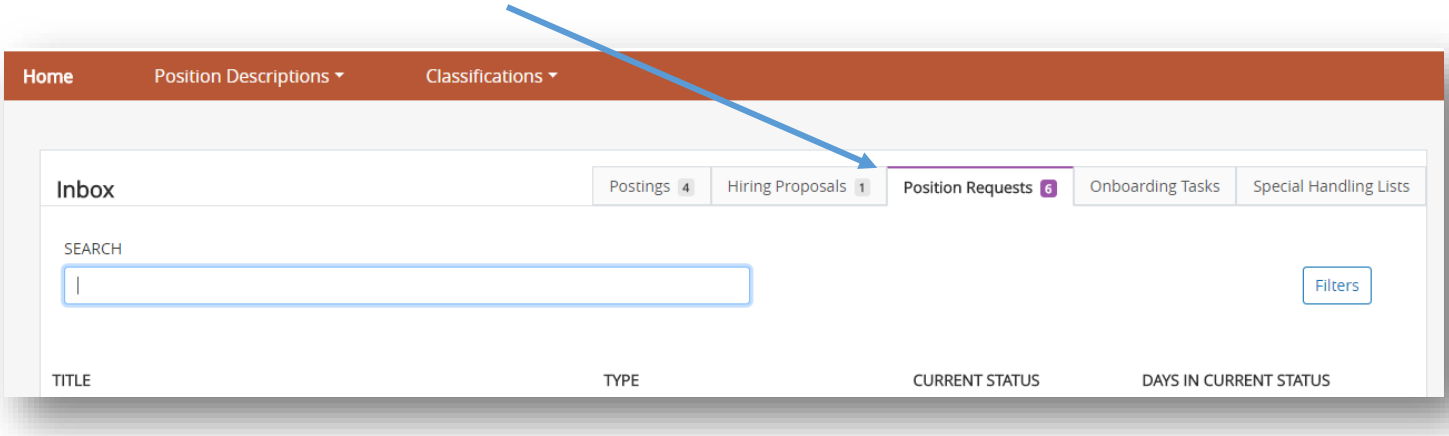


End of Section

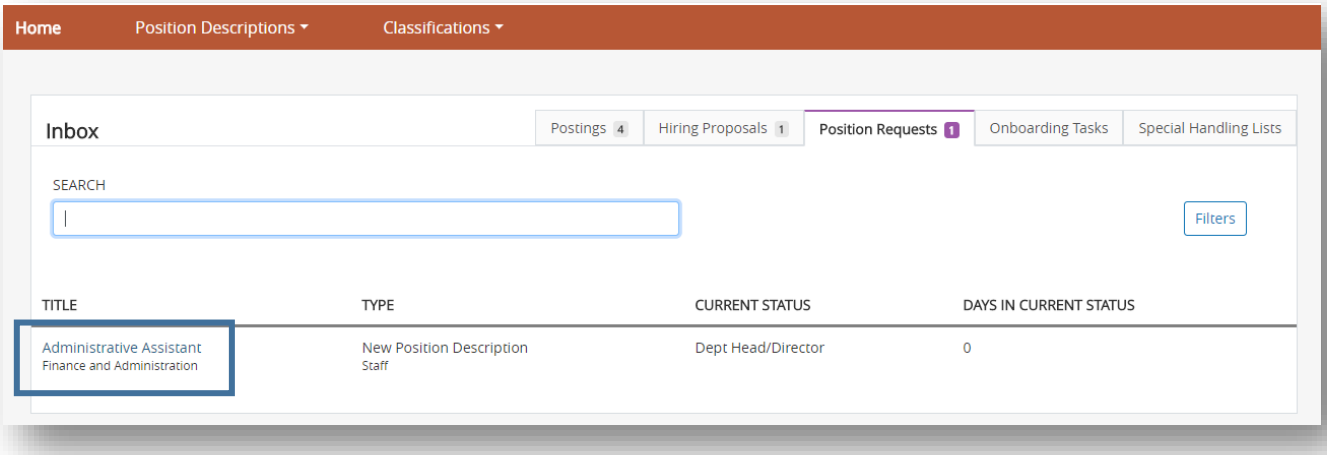
Reviewing Position Requests

Position requests that have been forwarded to the Dean/VP queue can be quickly accessed from the home page.

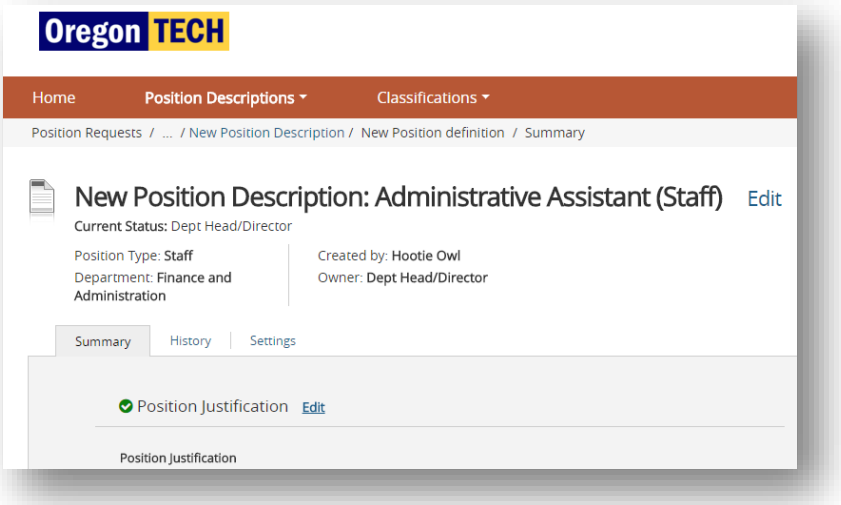
In your inbox, click on the **Position Requests** tab.



And then click on the **Title**.



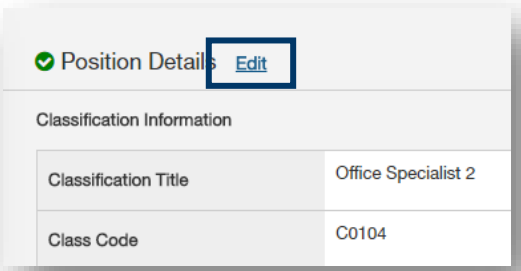
Clicking on the link will open the summary page of the position request.



There are a couple options for reviewing.

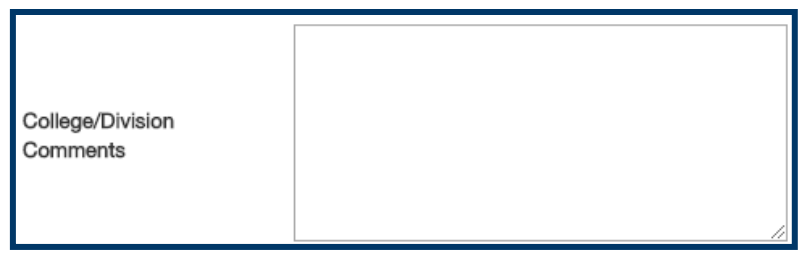
- Review the entire summary from the current page
- Enter the edit mode of the position request and review section by section

If you would like to review section by section, click the **Edit** button next to the position title at the top of the screen OR you can open the specific section by clicking the **Edit** button next to the section title.



If you opt to review the position request via the Summary and you find that a section needs to be edited, follow the steps above to edit the section.

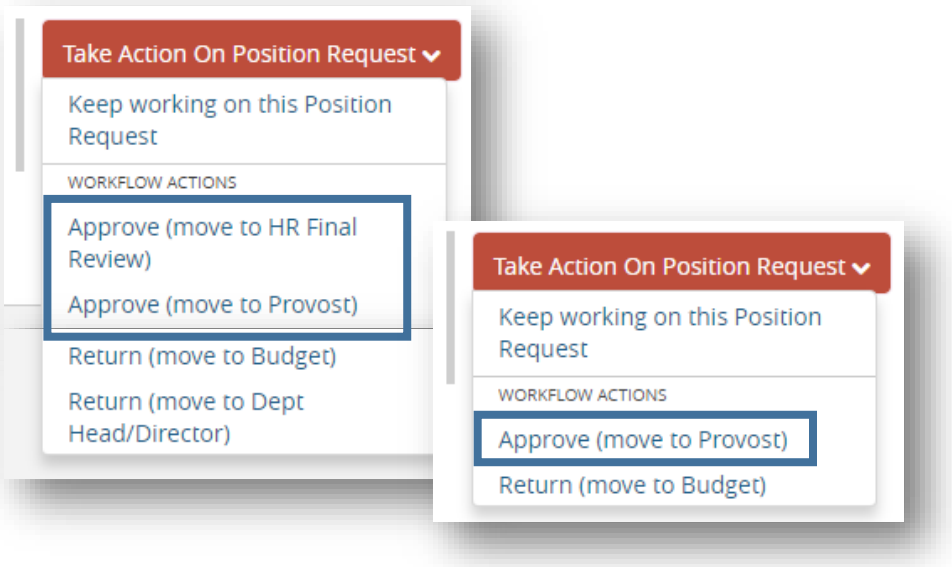
When you are reviewing the Budget section, add comments the **College/Divisions Comments** field with any information that may be helpful for the department roles, as needed.



Once the review is complete, navigate to the **Take Action On Position Request** button in the upper right corner of the screen and select **Approve (move to HR Initial Review)**. This moves the position request to HR for review.

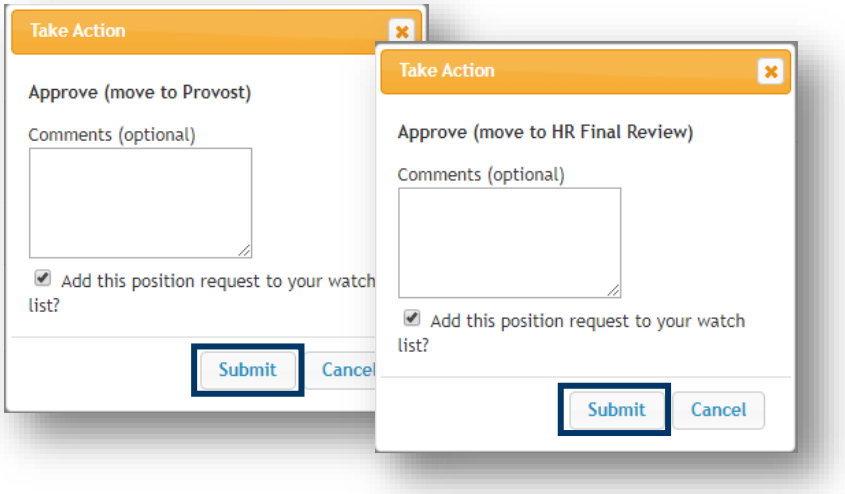
Once the position request is complete, navigate to the **Take Action On Position Request** button in the upper right corner of the screen and select:

- Staff: **Approve (move to HR Final Review)** OR **Approve (move to Provost)**, whichever is applicable
- Faculty: **Approve (move to Provost)**
- As needed, you can also return the posting to the Department User by selecting **Return (move to Budget)** or **Return (move to Dept Head/Director).** Follow up with the user as to why you are returning it (e.g. changes, additions, removals).



Once you select the Submit button, a window will pop up that is titled Take Action. This window gives you the option to enter comments and add the position request to your watch list. If you do not want to add it to your watch list, make sure to uncheck the check box.

Click the **Submit** button whenever you are ready.



After you submit, you will no longer be able to make changes. If you need to make changes after you submitting to the next queue, contact HR and ask for the item to be returned to your queue (oithr@oit.edu or 541.885.1120).

If you returned the item to a user earlier in the queue for changes, they will return the item to your queue once complete. HEROES will send you a notification once the item is submitted. Return to the top of this section for guidance on accessing the returned item.

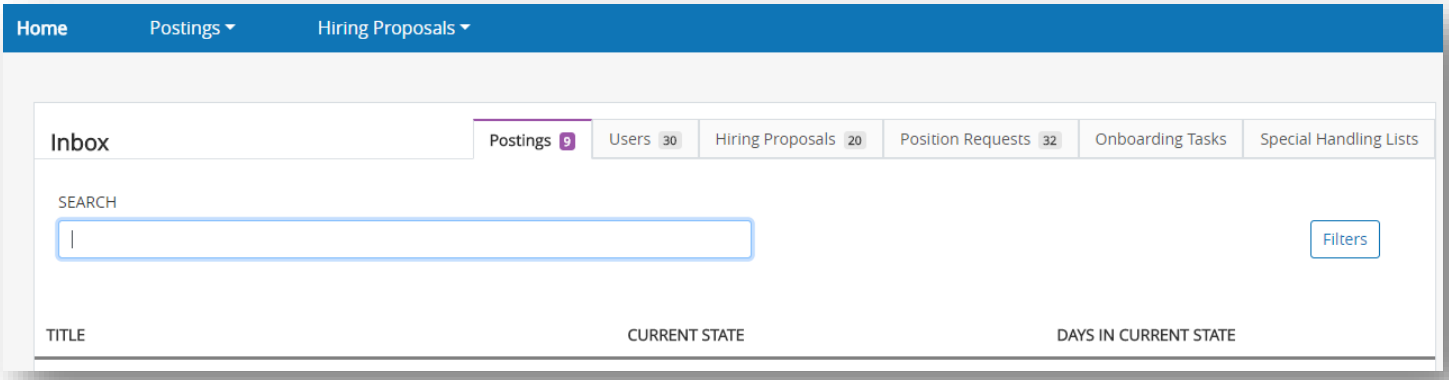
If you opt to add the posting to your watch list, it will show up on your Home page under your Watch List.

End of Section

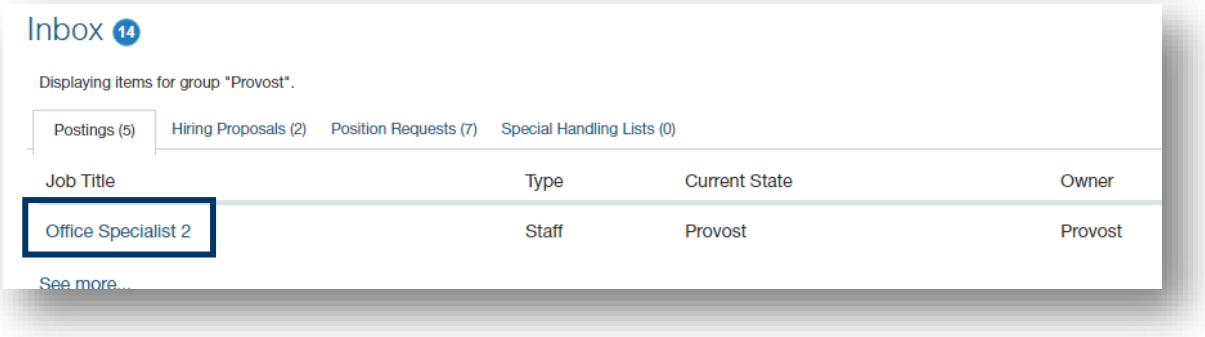
Reviewing Postings

Position requests that have been forwarded to the Dean/VP queue can be quickly accessed from the home page.

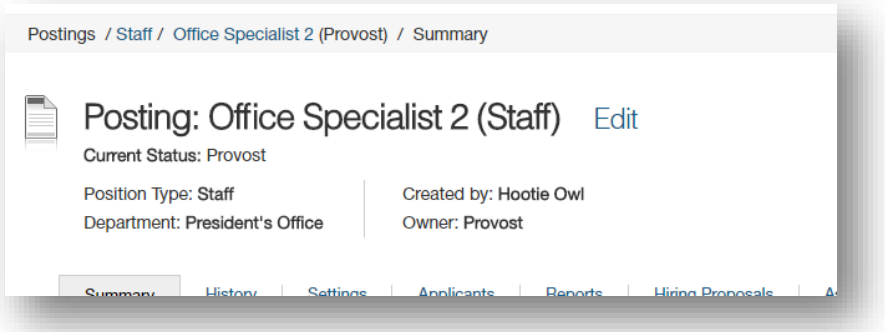
In your inbox, the **Posting** tab opens by default. If it doesn't, click on the **Posting** tab to access postings that are in your queue.



And then click on the **Title**.



Clicking on the link will open the summary page of the posting.



There are a couple options for reviewing. You can review the entire summary from the current page OR you can enter the edit mode of the posting and review section by section.

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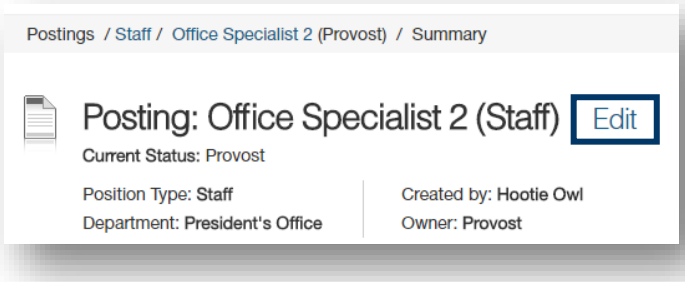
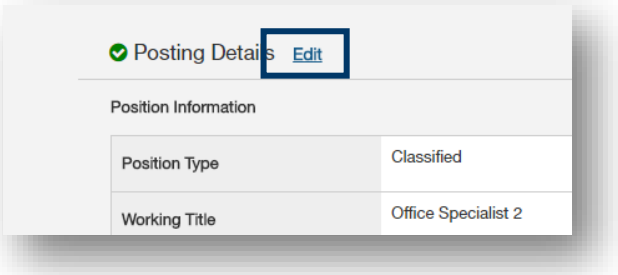
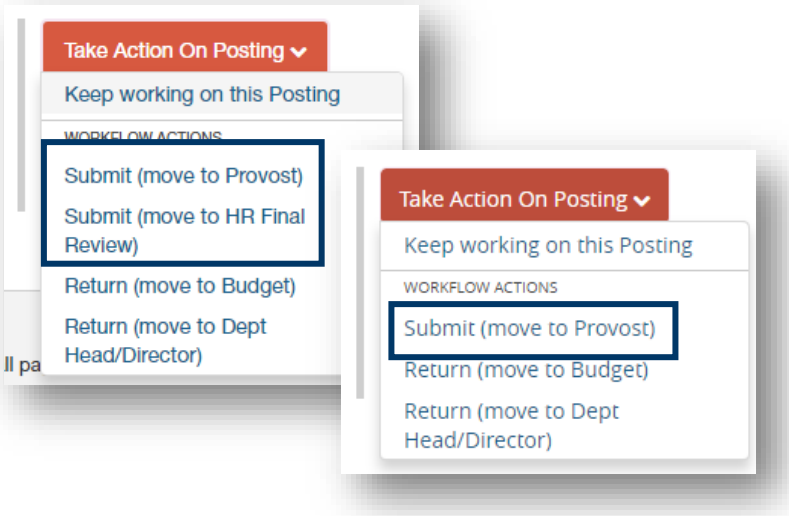




If you opt to review via the Summary and you find that a section needs to be edited, follow the steps above to edit the section.

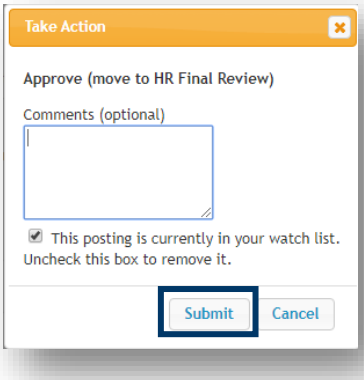
Once the review is complete, navigate to the **Take Action On Posting** button in the upper right corner of the screen and select:

- Staff: **Submit (move to HR Final Review)** OR **Submit (move to Provost)**, whichever is applicable
- Faculty: **Submit (move to Provost)**
- As needed, you can also return the posting to Budget or the Department Head/Director by selecting **Return (move to Budget)** or **Return (move to Dept Head/Director).** Follow up with the user as to why you are returning it (e.g. changes, additions, removals).



Once you select the Submit button, a window will pop up that is titled Take Action. This window gives you the option to enter comments and add the position request to your watch list. If you do not want to add it to your watch list, make sure to uncheck the check box.

Click the **Submit** button whenever you are ready.



After you submit, you will no longer be able to make changes. If you need to make changes after you submitting to the next queue, contact HR and ask for the item to be returned to your queue (oithr@oit.edu or 541.885.1120).

If you returned the item to a user earlier in the queue for changes, they will return the item to your queue once complete. HEROES will send you a notification once the item is submitted. Return to the top of this section for guidance on accessing the returned item.

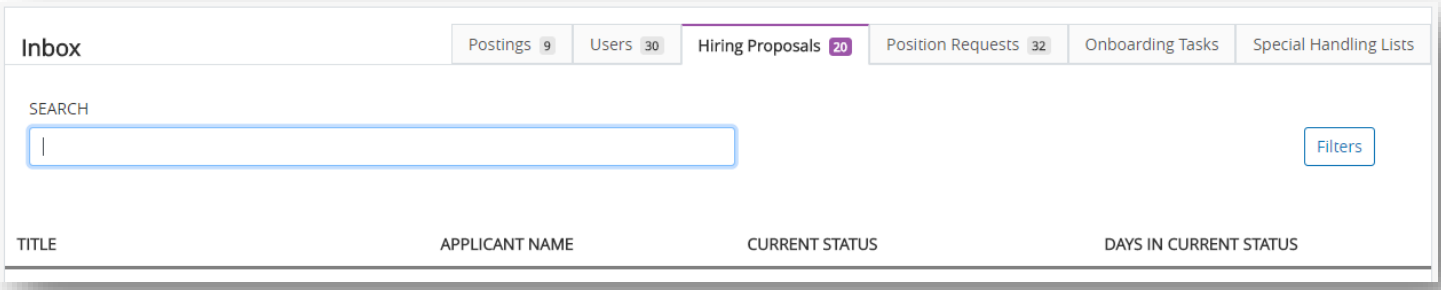
If you opt to add the posting to your watch list, it will show up on your Home page under your Watch List.

End of Section

Reviewing Hiring Proposals

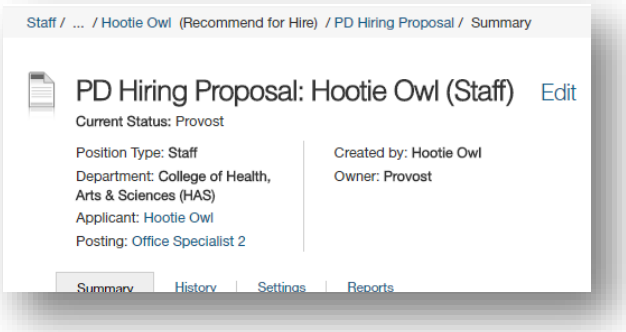
Hiring proposals that have been forwarded to the Dean/VP queue can be quickly accessed from the home page.

Hiring proposals will be in the Hiring Proposal section of your Inbox. Click on the **Hiring Proposal** tab to access items in your queue.



Click on the **Job Title** to open the hiring proposal.

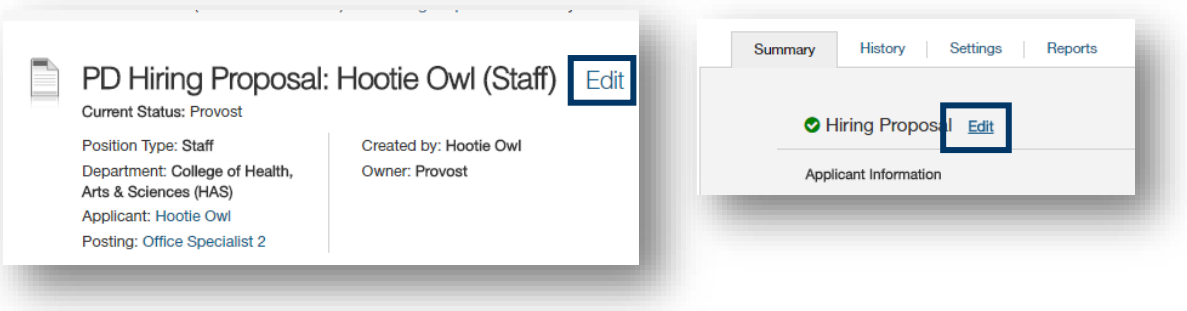
Clicking on the link will open the summary page of the hiring proposal.



There are a couple options for reviewing:

- Review the entire hiring proposal from the summary page, OR
- Enter the edit mode and review specific sections.

If you would like to review section by section, click the **Edit** button next to the position title at the top of the screen OR you can open a specific section by clicking the **Edit** button next to the section title.

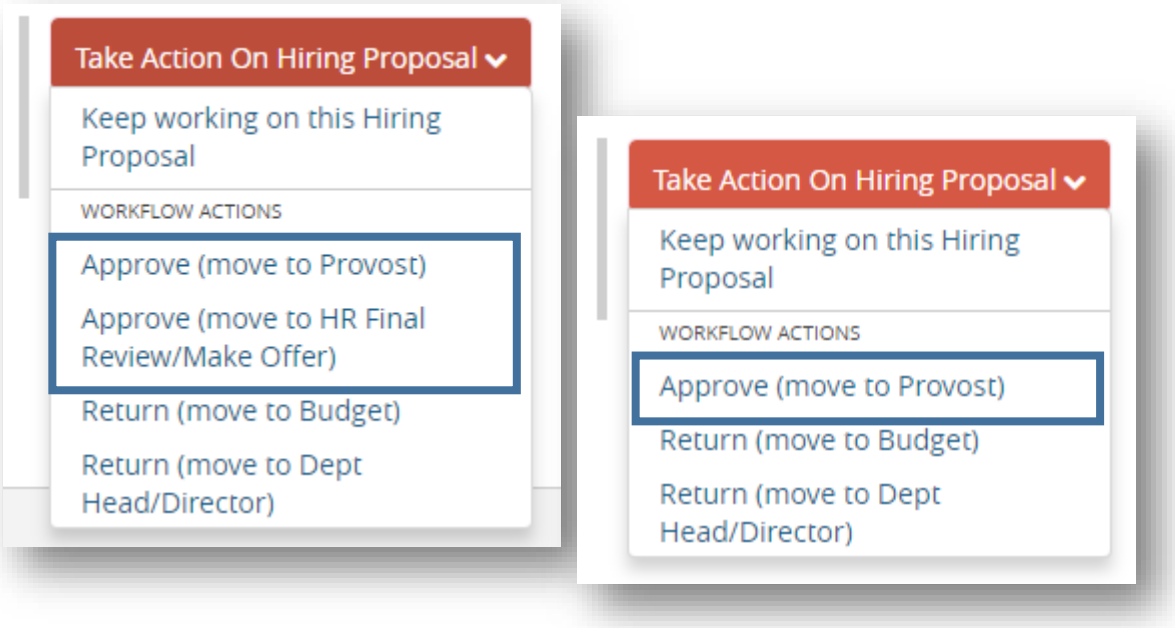


If you opt to review the position request via the Summary and you find that a section needs to be edited, follow the steps above to edit the section.

If you discover that edits need to be made, click the **Edit** button next to the hiring proposal title at the top of the screen OR you can open the specific section that needs to be edited by clicking the **Edit** button next to the section title.

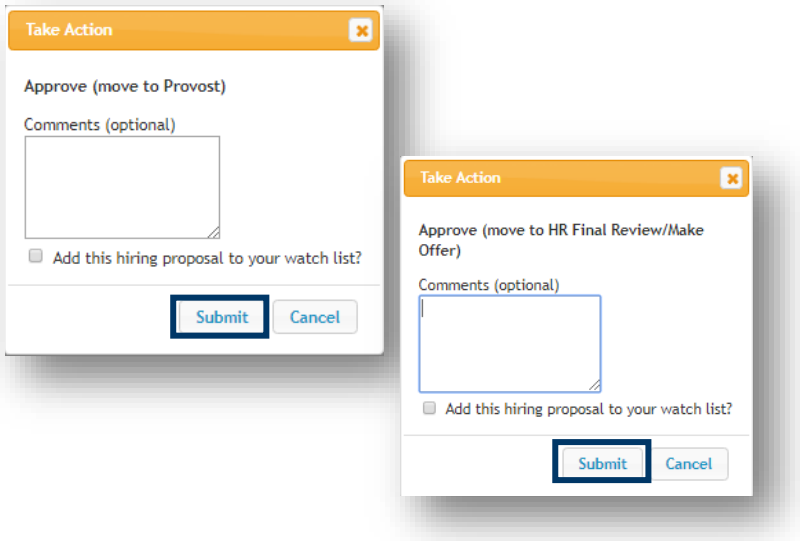
Once the review is complete, navigate to the **Take Action On Hiring Proposal** button in the upper right corner of the screen and select:

- Staff: **Approve (move to Provost)** or **Approve (move to HR Final Review/Make Offer)**, whichever is most appropriate.
- Faculty: **Approve (move to Provost)**
- As needed, you can also return the posting to the Department User by selecting **Return (move to Budget)** or **Return (move to Dept Head/Director).** Follow up with the user as to why you are returning it (e.g. changes, additions, removals).



Once you select the Submit button, a window will pop up that is titled Take Action. This window gives you the option to enter comments and add the position request to your watch list. If you do not want to add it to your watch list, make sure to uncheck the check box.

Click the **Submit** button whenever you are ready.



After you submit, you will no longer be able to make changes. If you need to make changes after you submitting to the next queue, contact HR and ask for the item to be returned to your queue (oithr@oit.edu or 541.885.1120).

If you returned the item to a user earlier in the queue for changes, they will return the item to your queue once complete. HEROES will send you a notification once the item is submitted. Return to the top of this section for guidance on accessing the returned item.

If you opt to add the posting to your watch list, it will show up on your Home page under your Watch List.

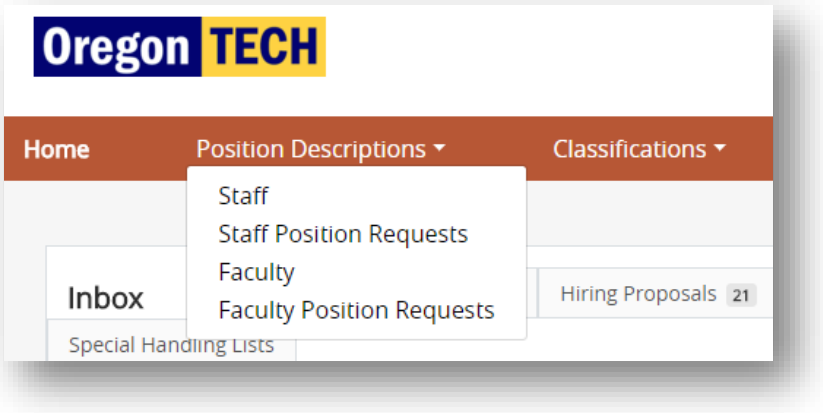
End of Section

Appendix I: Finding a Lost or Paused Position Request

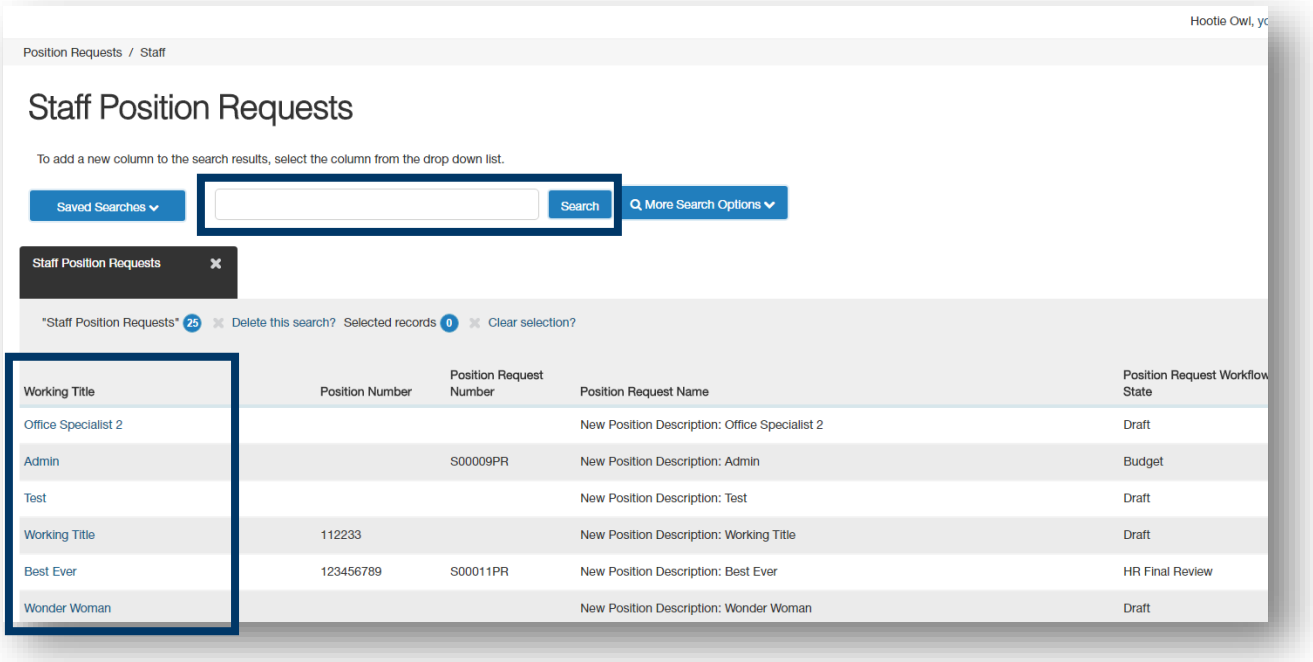
This section is to help you find a position request that you have accidentally navigated away from or to find a position request you needed to stop working on for a time.

Make sure you are in the **Position** module (orange).

Click on **Position Descriptions** and select **Staff Position Request** or **Faculty Position Request**.

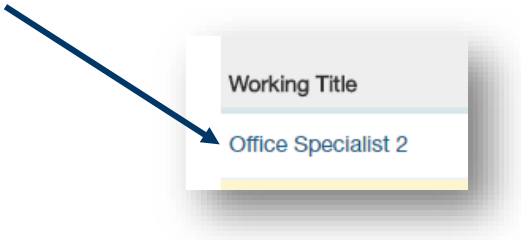


Find the position request by using the **Search** function or by scrolling through the list.

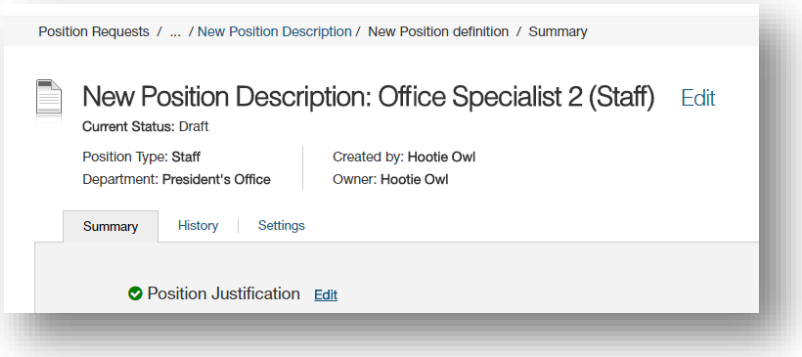


Before selecting the position, make sure to check the position request's **status** in the **Position Request Workflow State**. If the status is anything other than your queue, you may not be able to take action on the position request.

Click on the **Working Title link** to open the position request.



Clicking on the link will open the summary page of the position request.



If the position request is ready to be submitted, follow the instructions in the position request Summary section.

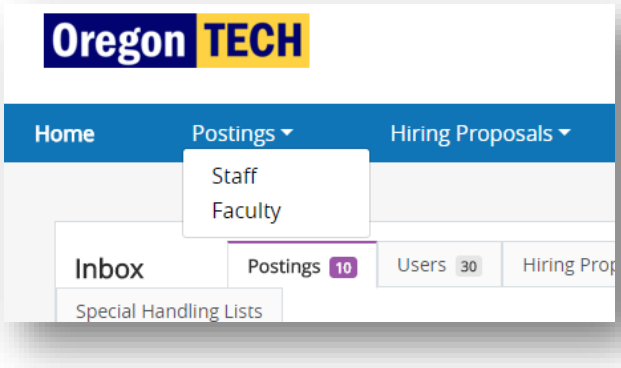
End of Section

Appendix II: How to Find a Lost or Paused Posting

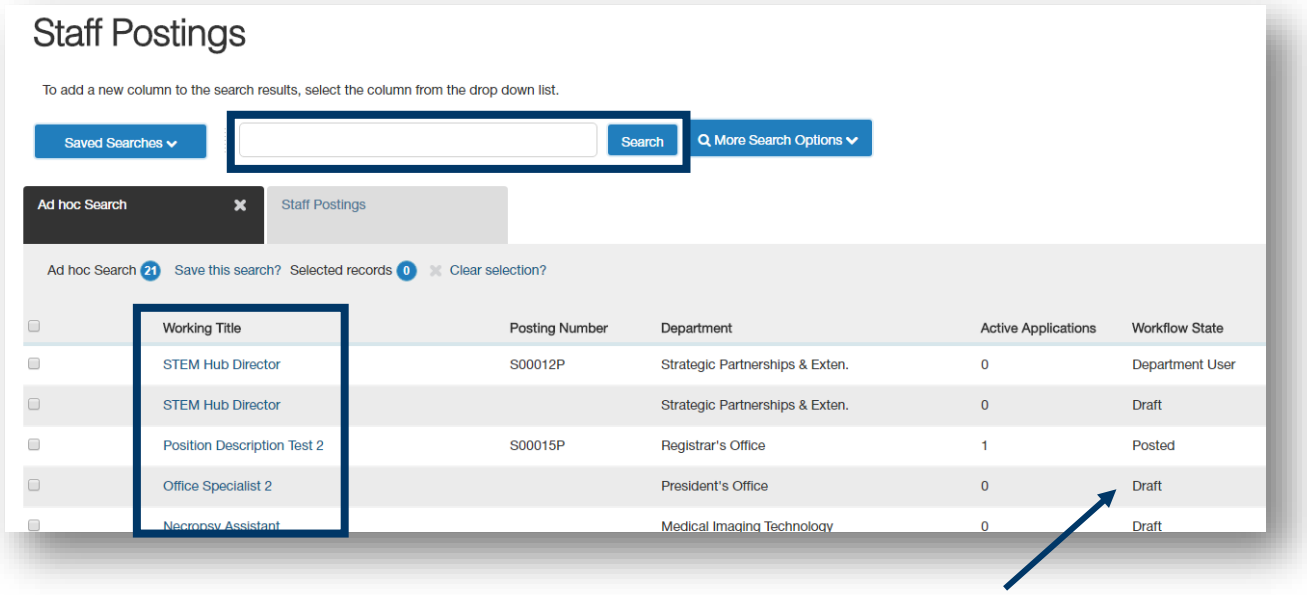
This section is to help you find a posting that you have accidentally navigated away from or to find a posting you needed to stop working on for a time.

Make sure you are in the **Hire** module (blue banner).

Click on **Postings** and select **Staff** or **Faculty**.

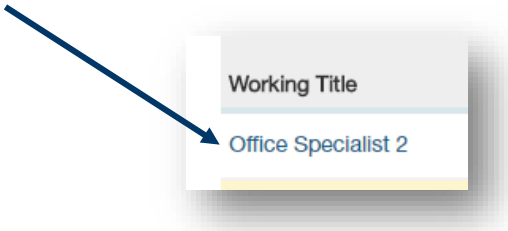


You can find the posting by using the **Search** function or by scrolling through the list.

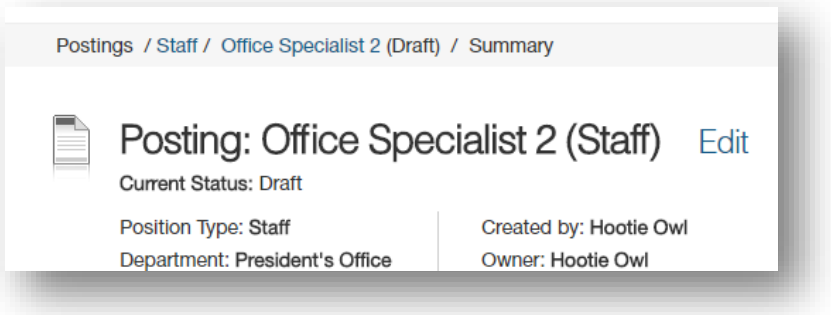


Before selecting the item, make sure to check the posting's **status** in the **Workflow State** column. If the status is anything other than your queue, you may not be able to take action on the posting.

Click on the **Working Title link** to open the posting.



Clicking on the link will open the summary page of the posting.



If the posting is ready to be submitted, follow the instructions in the posting Summary section.

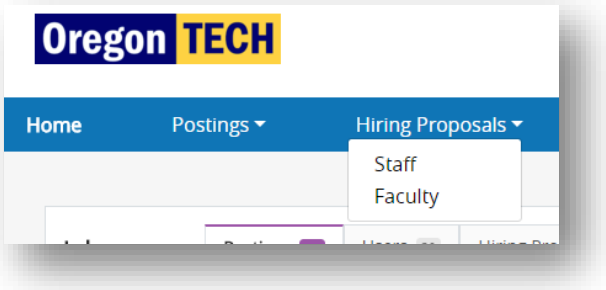
End of Section

Appendix III: How to Find a Lost or Paused Hiring Proposal

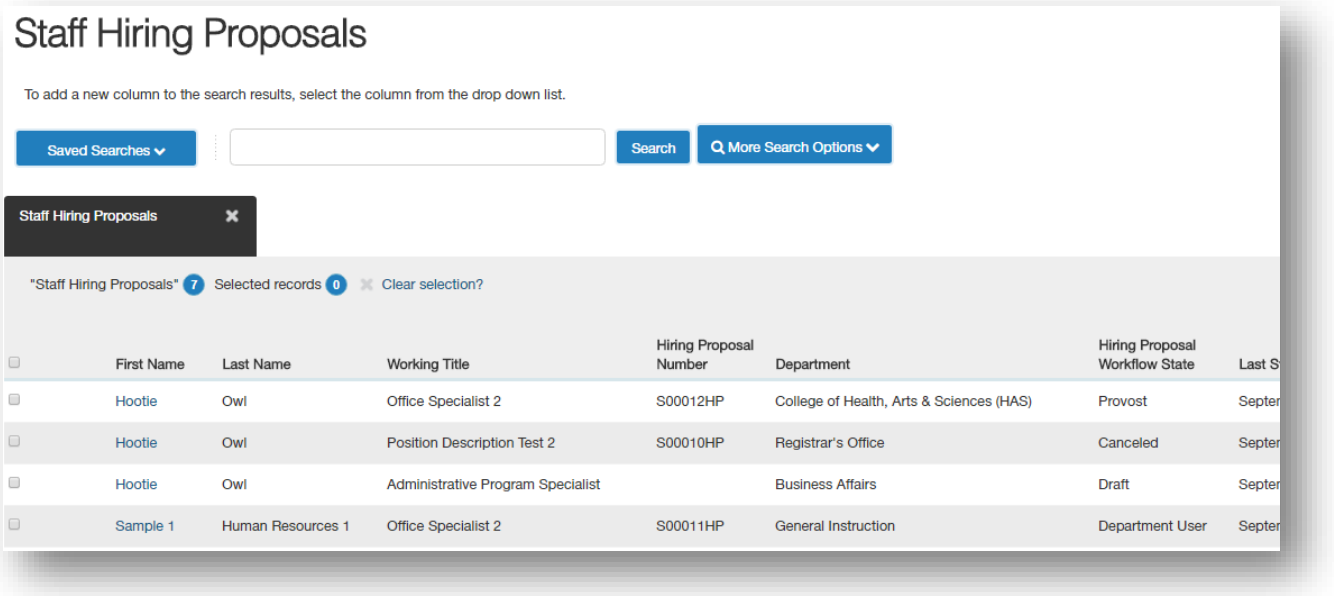
This section is to help you find a hiring proposal that you have accidentally navigated away from or to find a hiring proposal you needed to stop working on for a time.

Make sure you are in the **Hire** module (blue banner).

Click on **Hiring Proposals** and select **Staff** or **Faculty**.

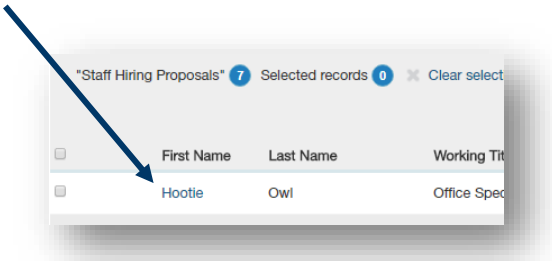


You can find the hiring proposal by using the **Search** function or by scrolling through the list.

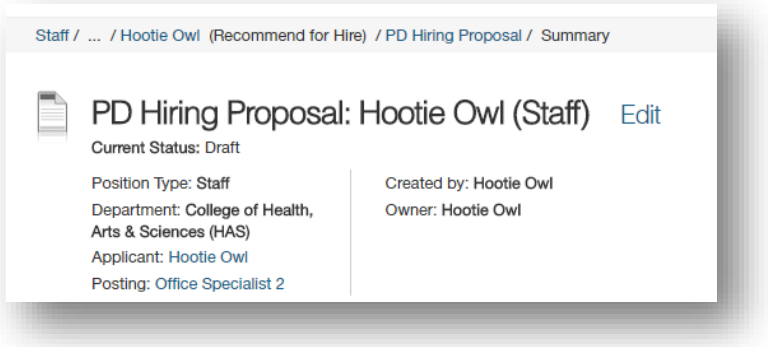


Before selecting the position, make sure to check the hiring proposal's **status** in the **Workflow State** column. If the status is anything other than Draft or your role's queue, you may not be able to take action on the hiring proposal.

Click on the **First Name link** to open the hiring proposal.



Clicking on the link will open the summary page of the hiring proposal.



If the hiring proposal is ready to be submitted, follow the instructions in the position request Summary section.

End of Section

Appendix IV: Contact & Support Information

Harmony Stobaugh HR Consultant Snell Hall 110 541.885.1278 harmony.stobaugh@oit.edu	Sandi Hanan Senior HR Consultant Snell 111 541.885.1074 sandi.hanan@oit.edu