



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

Position Descriptions, Postings, and Hiring Proposals

Department Head/Director User Guide

Table of Contents

Click on an item to jump to that section.

Introduction	4
Tasks Available in HEROES*	4
Best Web Browsers to Use	4
Security of Information / Applicant Data	4
System Questions	4
User Expectations	5
Logging Into HEROES	5
HEROES Navigation Essentials & System Terminology	6
The Home Page	6
Modules	8
<i>Positions Module (Orange banner)</i>	8
<i>Hire Module (Blue banner)</i>	8
<i>Onboard Module</i>	9
Roles	9
<i>Role Definitions</i>	9
<i>Switching Between Roles</i>	10
<i>Setting Your Preferred Role and Module at Login</i>	10
<i>HEROES Workflow – for Position Descriptions, Postings, and Hiring Proposals</i>	12
Creating New Position Descriptions	13
Initial Steps	14
Position Justification Page	15
Classification Selection Page	16
Budget Summary Page	19
Physical Requirements & Work Environment Page	21
Employee Page	21
Supervisor Page	22
Position Documents Page	22
Reviewing Position Requests	26
Creating Postings	30
Initial Steps	31
Posting Details Page	34
Budget Summary Page	38
*Supplemental Questions Page	38
*Applicant Documents Page	39
Guest User Page	39
Posting Documents Page	40
Search Committee Members Page	41
Summary Page	43
Reviewing Postings	45
Creating Hiring Proposals	49
Initial Steps	50
Hiring Proposal Page	52
Hiring Proposal Documents Page	53
Summary Page	55
Reviewing Hiring Proposals	58
Appendix I: Modifying a Current Position Description	62
Appendix II: Finding a Lost or Paused Position Request	64

Appendix III: How to Find a Lost or Paused Posting.....	66
Appendix IV: How to Find a Lost or Paused Hiring Proposal	68
Appendix V: Contact & Support Information.....	70

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 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.

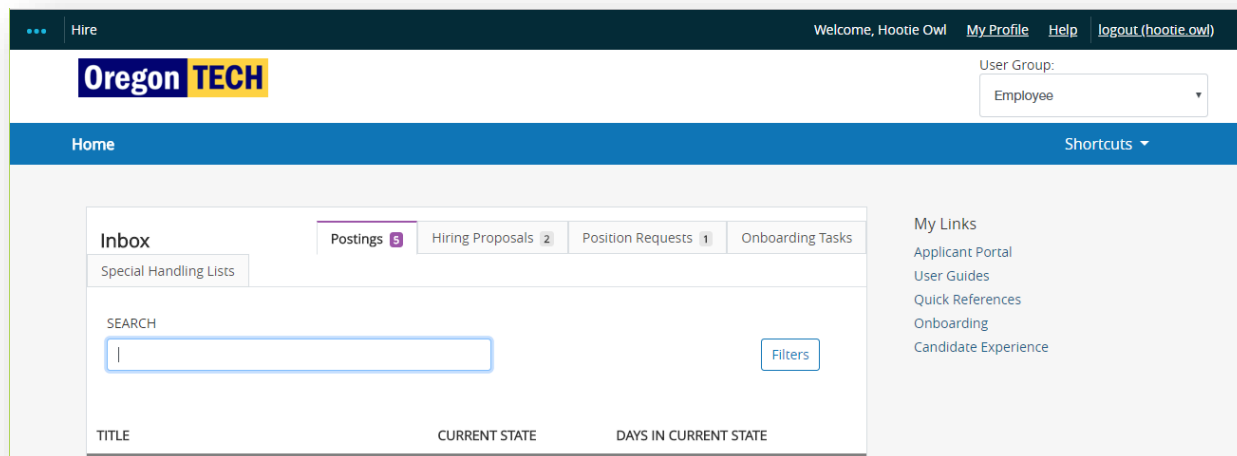
If you experience any issues with the login, please call 541.885.1120.

HEROES Navigation Essentials & System Terminology

Key system terms are **bolded**.

The Home Page

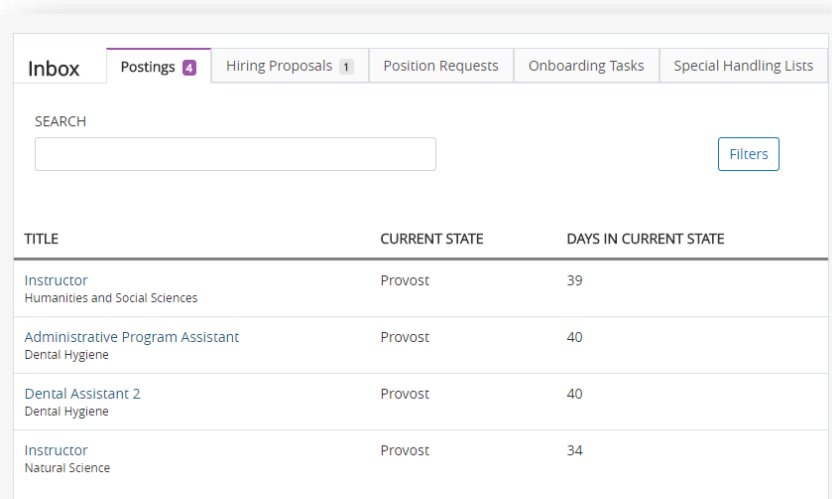
This is the page you see when you log in.



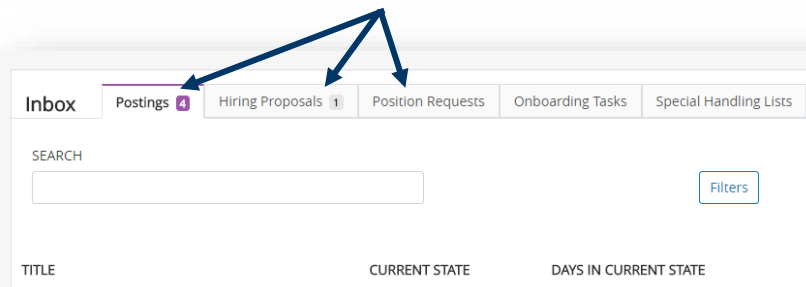
It presents a dashboard that provides access to:

Summary views of your Inbox and Watch List.

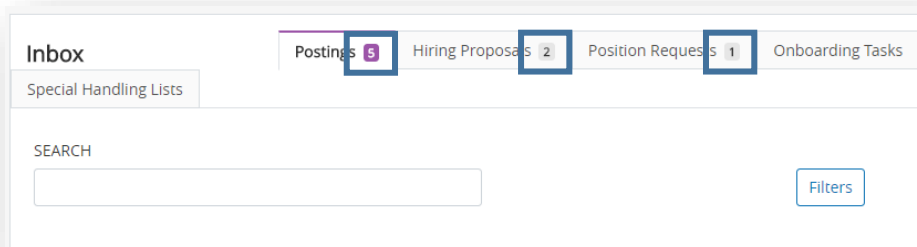
The **Inbox** presents within the system that are in your queue. These tasks include all items that you are authorized to act on.



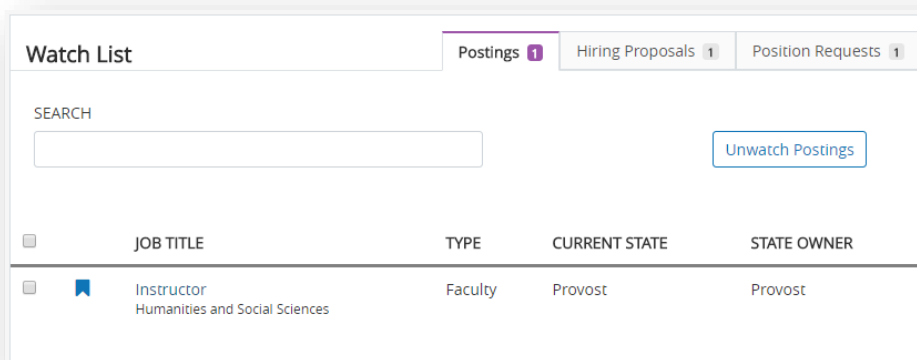
- Navigate between the three main Inbox tabs by clicking on the tab names.



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

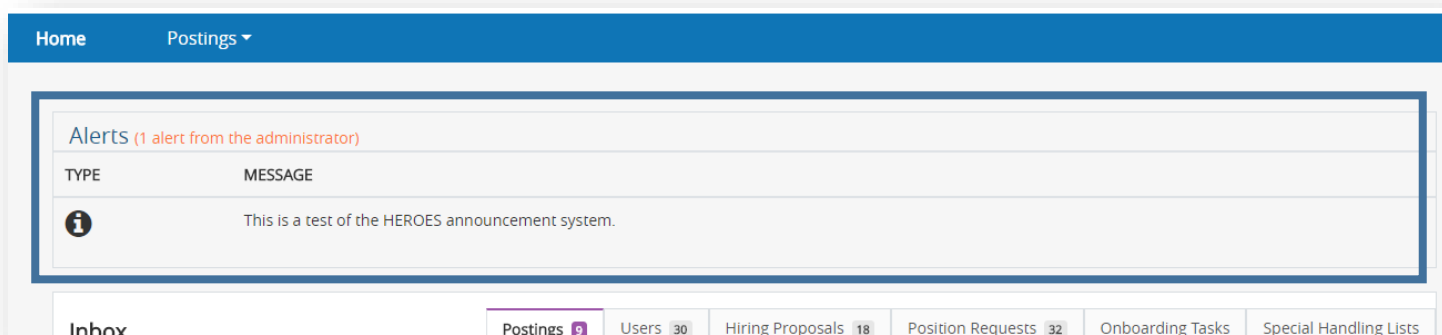


- The **Watch List** allows you to follow the progress of items for your department. The Watch List shows you where items are in the workflow. Items are automatically removed from your Watch List when they are completed or canceled



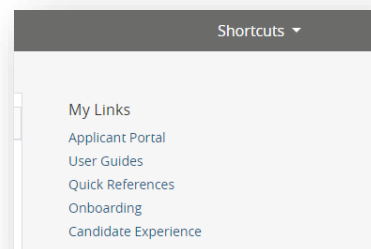
Alerts and Other Announcements

If there are any active **alerts** or **announcements** about HE, 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.



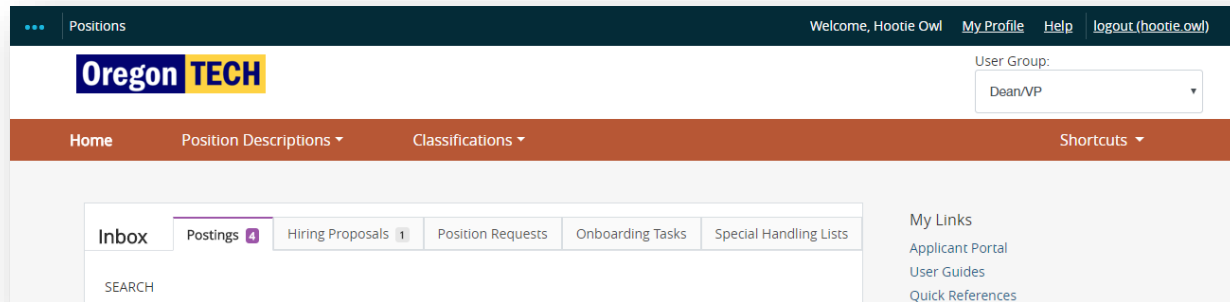
Modules

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)

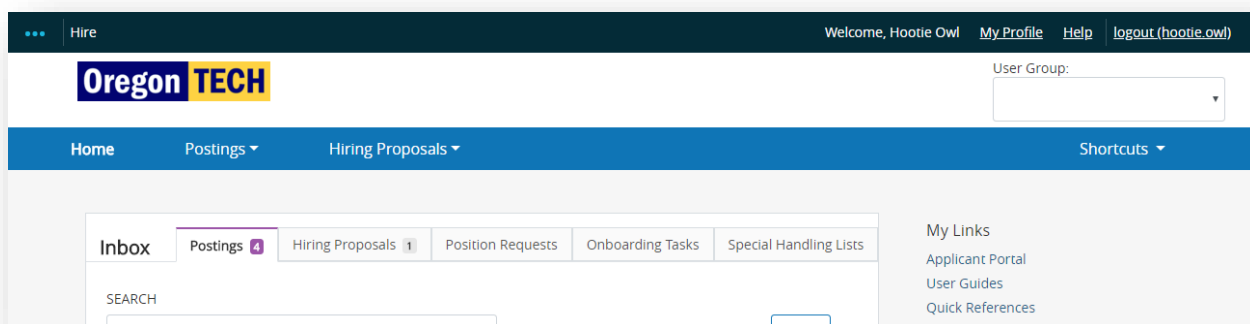
The **Positions module** gives the Department User or Department Head/Director role access to create new position descriptions and to view and/or modify existing position descriptions.



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.

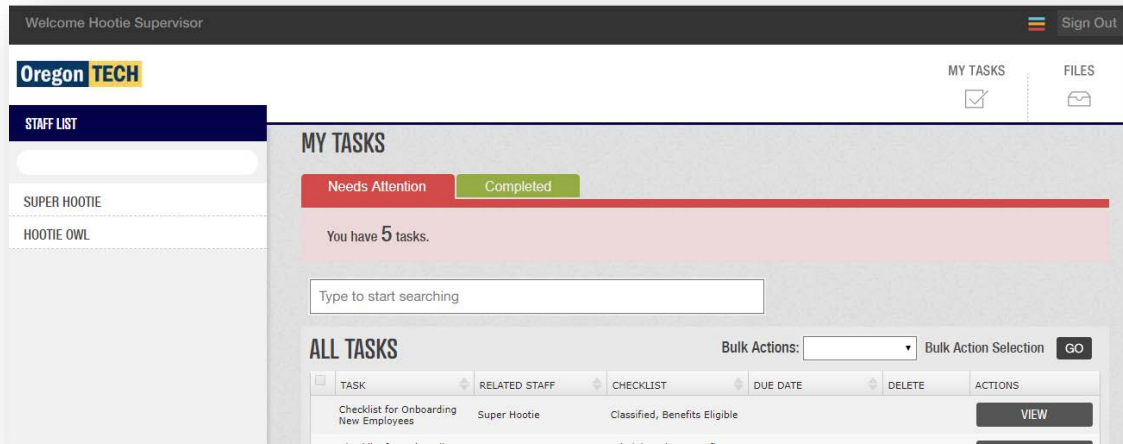


- **Postings** are announcements of job vacancies / job openings. Applicants apply to postings and HEROES gathers applications into one central location in the Hire module.
 - Postings are typically created from a position description once the position description has been finalized and approved.

- 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.

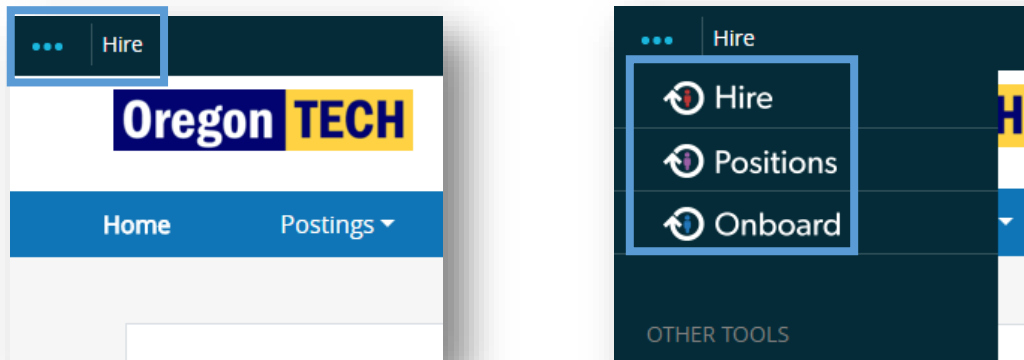
Onboard Module

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.

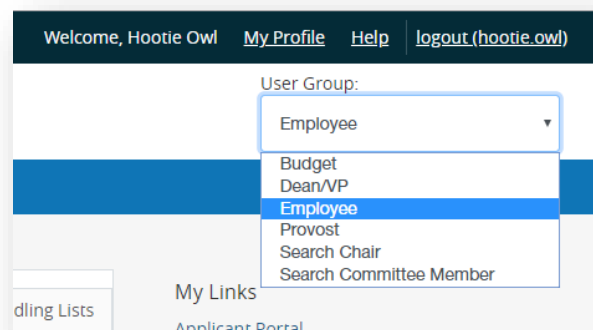
Role Definitions

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.

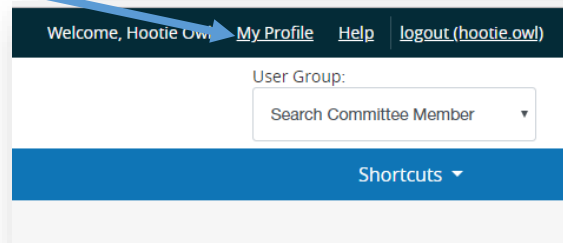
Your role list may be different than Hootie's in the screen shot above based on role(s) assigned to your position and your department(s).



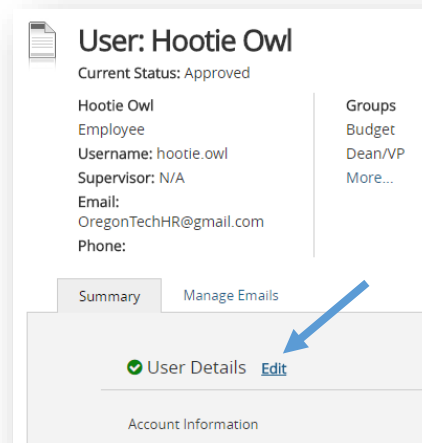
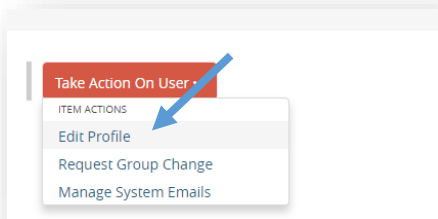
Setting Your Preferred Role and Module at Login

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

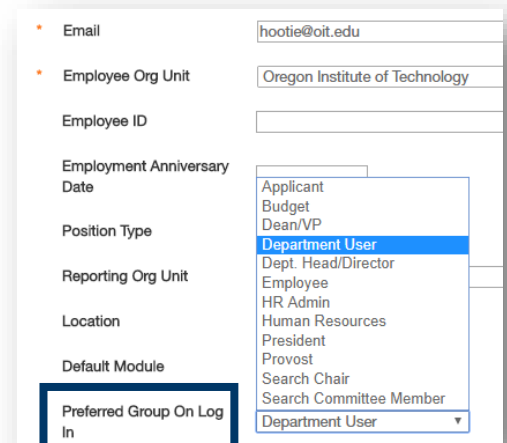
- Click on **My Profile** from the menu bar at the top of the screen.



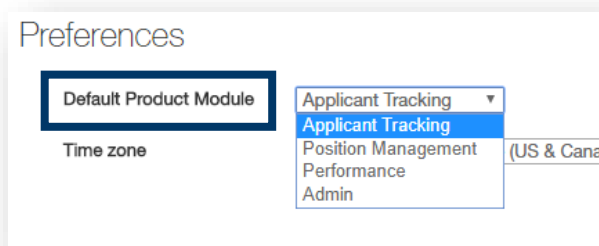
- Navigate to the **Take Action On User** button near the upper right corner and select **Edit Profile** OR click on **Edit** next to **User Details** in the tabbed section below the user information.



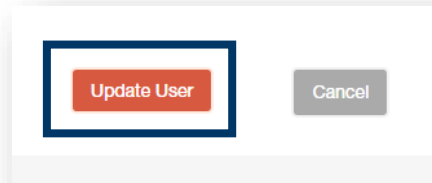
- Under Account Information, find **Preferred Group On Log In** and click on the dropdown to select the role you want to be logged into upon signing in.
- Depending on your assigned role(s), your list may be different than Hootie's is in the screen shot below.



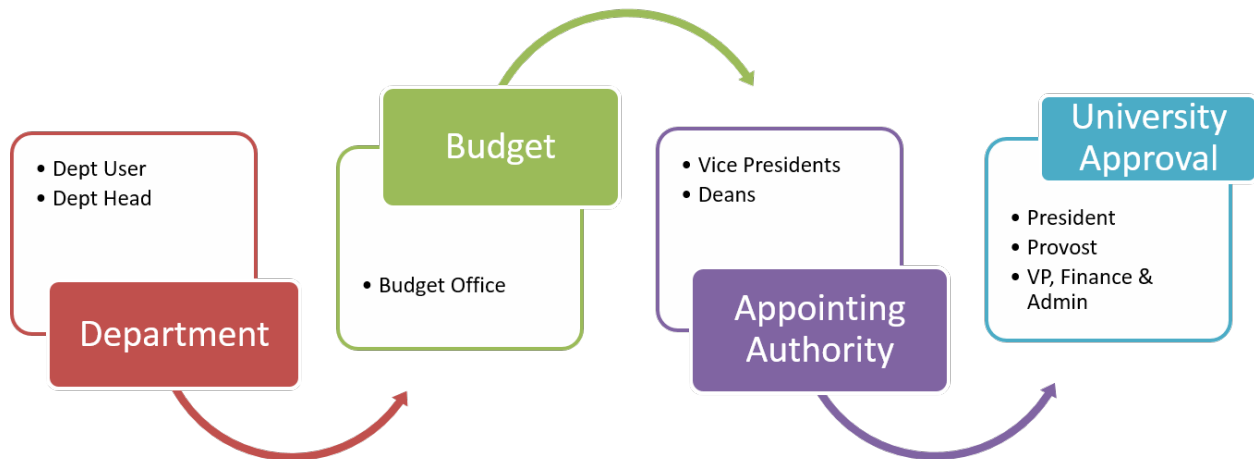
- Under Preferences, find **Default Product Module** and click on the dropdown to select the module you want to be automatically logged in to upon signing in.



- 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

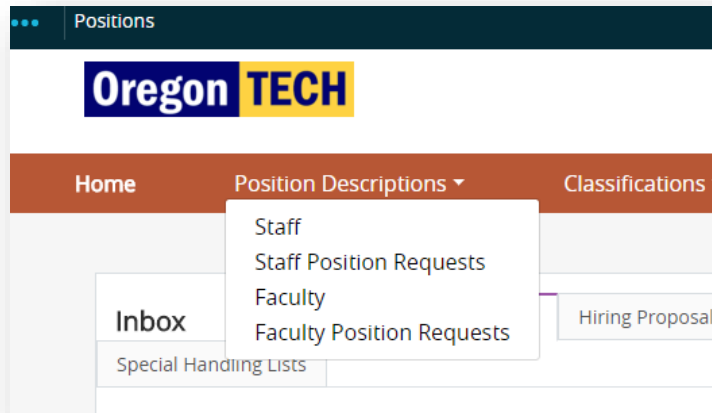
Creating New Position Descriptions

Items with an * indicate that they will be visible to applicants once the position is posted at <https://jobs.oit.edu/>.

Initial Steps

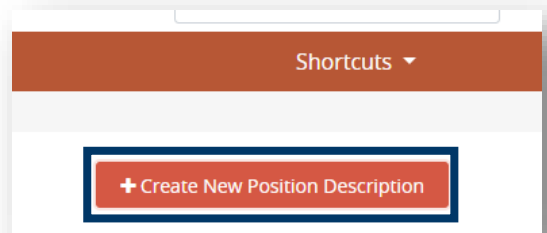
Make sure you are in the **Positions** module (orange).

Click on **Position Descriptions** and select **Staff** or **Faculty**, whichever position for which you need to start a position description.




**The "Position Requests" items are position description actions that have been completed OR are in progress.*

Click on the **+Create New Position Description** button in the upper right corner of the next screen.



On the next screen, enter the **Working Title**.

Position Descriptions / Staff / New Position Description

 New Position Description

To create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.

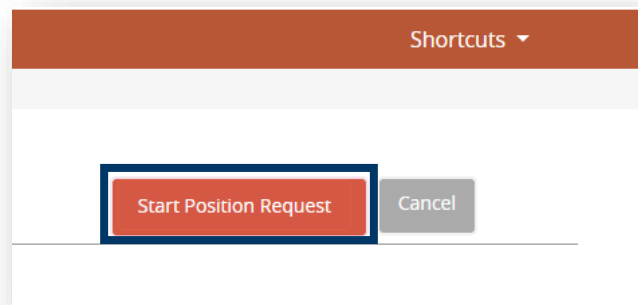
Working Title *

Organizational Unit

Division *

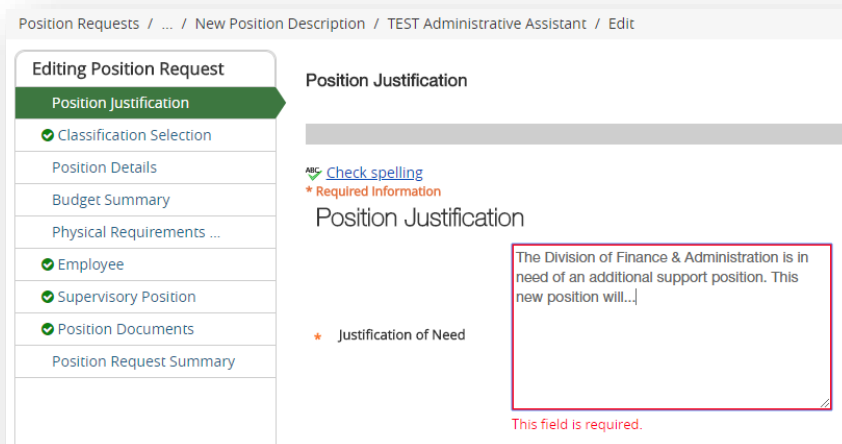
Department *

Then click on the **Start Position Request** button in the upper right corner.

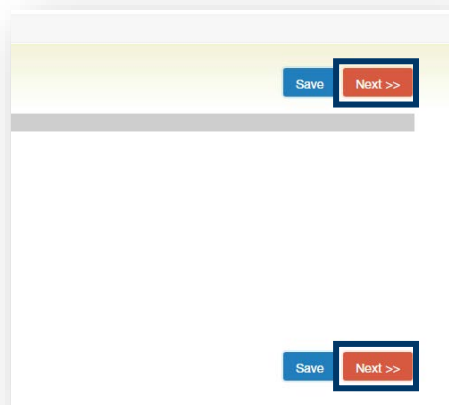


Position Justification Page

Enter the **Position Justification**.



Click **Next** on the right side of your screen (buttons located on the right side of the screen at the top and bottom). This will save your work and advance you to the next section of the position request.



If you need to continue working on the current page but want to save your work, click the **Save** button (located adjacent to the Next button). When you are done working on the page, click **Next** to advance to the next section of the position request.

Classification Selection Page

Select the **Classification** for the position by clicking the radio button next to the Classification.

*If you do not know which Classification to select, click **Next** to advance to the next page without selecting a Classification Title. The Office of Human Resources will select the appropriate classification after reviewing.*

The screenshot shows the 'Classification Selection' page. On the left is a sidebar titled 'Editing Position Request' with a list of steps: Position Justification, Classification Selection (highlighted with a green arrow), Position Details, Budget Summary, Physical Requirements..., Employee, Supervisory Position, Position Documents, and Position Request Summary. The main area is titled 'Classification Selection' and contains a section 'Classifications - Filter these results'. Below this, there is a summary bar: '"Staff Classifications" 3 Selected records 0 Clear selection?'. A table lists three classifications: 'ADMINISTRATIVE PROGRAM SPECIALIST', 'INFORMATION TECHNOLOGY CONSULTANT', and 'Office Specialist 2'. Each row has a radio button to its left. The radio button for 'Office Specialist 2' is selected and is highlighted with a blue square.

If the Classification is not readily available in the list on the screen, click on **Filter these results** to open the query function.

This screenshot is a closer view of the 'Classification Selection' page. It shows the sidebar on the left and the main content area. The 'Filter these results' button is highlighted with a blue square.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

Position Details Page

The first block of information, Classification Information, feeds over from the Classification you selected earlier.

Editing Position Request

Position Justification

Classification Selection

Position Details

Budget Summary

Physical Requirements ...

Employee

Supervisory Position

Position Documents

Position Request Summary

Position Details

Check spelling

Classification Information

Classification Title	Office Specialist 2
Class Code	C0104
Job Family	
Position Type	Classified
Pay Range	
Min Salary	\$2,383
Mid Salary	\$2,921
Max Salary	\$3,458

The Office Specialist 2 performs a wide range of office support, technical, and/or minor administrative functions.

This is the third level in a three-level series. The Office Specialist 2 is distinguished from the Office Specialist 1 by the complexity of the work and the degree of independence.

Duties at this level are performed independently and often involve the completion of varied and unusual assignments.

Assignments or technical functions may involve the use of numerous guides, instructions, regulations, and procedures.

Fields that require completion are indicated with * and are highlighted with a red box. All fields in the screenshot below will be visible to applicants once the position is posted at <https://jobs.oit.edu/>.

Position Information

Working Title

TEST Administrative Assistant

Position Number

College/Division

Finance and Administration

Department

Finance and Administration

Hiring Unit

Please select

Work Location

Please select

This field is required.

Position Terms/Mo

This field is required.

Full/Part time

Please select

This field is required.

Appointment FTE (%)

This field is required.

Exempt/Non-Exempt

Position Summary

This field is required.

***Classification Requirements** default in based on the classification selected. These are hard coded and cannot be changed.

Classification Requirements	<ul style="list-style-type: none">• Two years of general clerical experience, one year of which included typing, word processing, or other experience generating documents; OR• An Associate's degree in Office Occupations or Office Technology; OR• Graduation from a private school of business with a Certificate in Office Occupations or Office Technology and one year of general clerical experience. <p>College courses in Office Occupations or Office Technology will substitute for the required experience on a year-for-year basis.</p> <p><i>Note: A job function may be considered MARGINAL if: the function is considered to be an incidental or small part of the job; or the function can be easily transferred to another employee.</i></p>
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*Complete the **Additional Requirements** and **Preferred Qualifications** fields.

* Additional Requirements	
	This field is required.
Preferred Qualifications	

In the **Job Duties** section, click on the **Add Job Duties Entry** button to begin adding duties.

- This section is NOT required for faculty positions.
- For staff position:
 - At least three sections are required.
 - Should have 5-7 sections as a best practice.
 - Must have an Other Duties as Assigned section at 5-10% that is noted as non-essential.
- Duties must total 100%.
- Percentages of time must be in increments of 5% and no less than 5%.

Job Duties

Job Duties: List the current job duties assigned to the position, in order of importance.

Please note: Percentages must add up to 100% (regardless of part-time status).

Job Function (Optional): The job function is an optional field and can be used to categorize duties. For example, "Administrative Support".

Add Job Duties Entry

Complete the blank fields in the new section.

Job Function (Optional): The job function is an optional field and can be used to describe "Administrative Support".

Job Function

Description of Job Function

Welcomes visitors by greeting them, in person or on the telephone; answering or referring inquiries. Directs visitors by maintaining employee and department directories; giving instructions. Maintains security by following procedures; monitoring logbook; issuing visitor passes.

Essential

Percentage Of Time
Enter a number with a maximum of 3 digits.

☐ Remove Entry?

Add Job Duties Entry

To add another duty section, click on the **Add Job Duties Entry** button. Complete the step above for the next job function (job duty).

Repeat the **Add Job Duties Entry** steps until all of the functions of the position are added and fully described.

Need to remove a job function? Select the **Remove Entry?** button below the job function to be removed and then click the **Save** button.

Description of Job Function

Essential

Percentage Of Time
Enter a number with a maximum of 3 digits.

☒ Remove Entry?

Add Job Duties Entry

Save

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

Budget Summary Page

This section will be reviewed by the Budget Office and other approvers in the approval queue. Questions about information for these fields should be forwarded to the Budget Office.

Complete the **Maximum Amount Currently Budgeted for Position** field with the appropriate information.

The screenshot shows a web form titled "Budget Summary". At the top, there is a "Check spelling" link. Below it is a blue button labeled "Add Budget Summary Entry". Under the heading "Budget Information", there is a text input field labeled "Maximum Amount Currently Budgeted for Position" which is highlighted with a blue border. Below this field is another empty text input field.

Complete the **Department Comments** field with any information that may be helpful for the Dean/VP approver and/or Budget approver roles.

The screenshot shows a section titled "Position" with a large text area labeled "Department Comments" outlined in blue.

Click on the **Add Budget Summary Entry** button to add an index and its related information. Complete the blank fields.

The screenshot shows the "Budget Summary" form with the following fields filled out: Index (OIT123), Fund (000000), Org (111111), Account (10102), Amount (50,000), and Prog (333333). The "Remove Entry?" checkbox is unchecked.

If there is more than one index for the position, click on the **Add Budget Summary Entry** button again to create a new record and complete the blank fields. Continue these steps until all indexes for the position have been added.

The Amount fields in each Budget Summary item should total to the amount indicated in the **Maximum Amount Currently Budgeted for Position** field under the Budget Information heading.

Need to remove a Budget Summary? Select the **Remove Entry?** button below the budget summary item to be removed and then click the **Save** button.

The screenshot shows a close-up of the "Prog" field with the value "333333" and a blue-bordered button labeled "Remove Entry?" with a checkmark icon.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

Physical Requirements & Work Environment Page

Complete all applicable fields so the position’s working environment is accurately described.

The screenshot displays three overlapping form panels. The top-left panel, titled 'Working Environment(s)', includes a 'Check spelling' link, a list of environment types (Athletic, Classroom, Clinical, Lab, Frequent Travel, Maintenance, Mechanical, Office, Outdoor, Other) with checkboxes, and a text area for additional environments. The middle panel, 'Physical Requirement(s)', lists physical tasks (Stoop/Bend, Crouch, Crawl, Kneel, Twist, Climb, Balance, Reach, Grasp, Push/Pull, Finger Dexterity, Sit, Drive) with dropdown menus for frequency. The right panel, 'Other Physical Requirement(s)', includes dropdowns for 'Lift/Carry Frequently' and 'Push/Pull Frequently', and a section for 'Unique Working Condition(s)' with dropdowns for Extreme Temperatures, Fumes/Odors/Mists/Dusts, Confined Areas/Spaces, Extreme Sounds/Noises/Vibrations, and Potential Hazards Exposure. It also has a text area for other unique conditions.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

Employee Page

When creating a new position description, this section should have a statement that says “Position description is vacant.”.

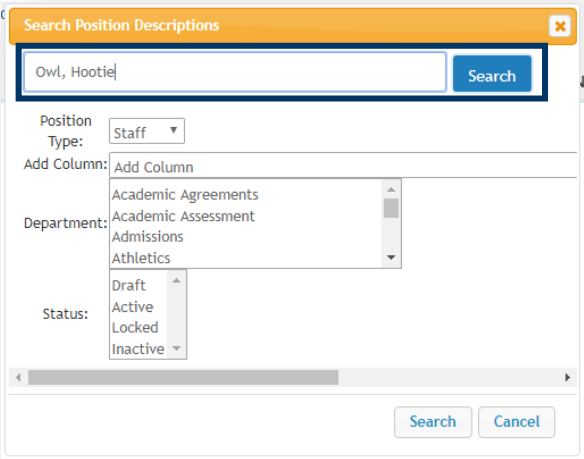
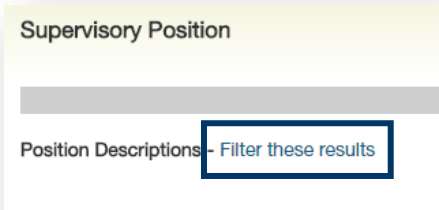
This section allows a user to select an employee name to connect to the position description. Even though this is an option, **please do not select an employee to connect to the position**. If an employee needs to be directly placed into

The screenshot shows a web interface for selecting an employee. It features a sidebar with a list of employees, a main content area with the heading 'Employee', and a message stating 'This position description is vacant.' in red text. Below the message is a link that says 'Users - Filter these results'.

the position, Human Resources will complete the task of connecting the employee to the position.

Supervisor Page

The next section is the **Supervisor** information. To assign a supervisor to the position, click **Filter these results** and search for the supervisor.

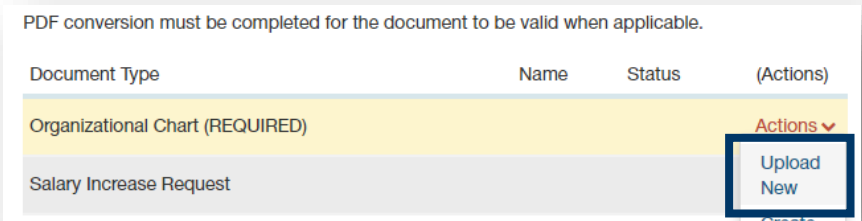


After you select the supervisor, click the **Next** button to advance to the next section of the position request.

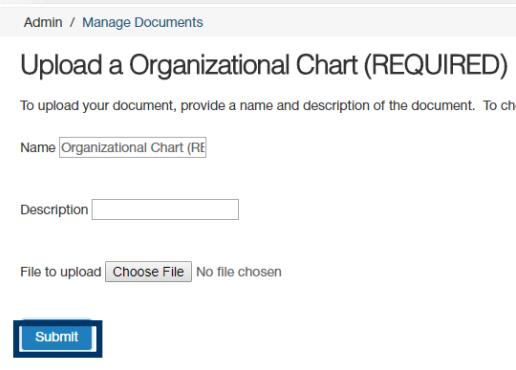
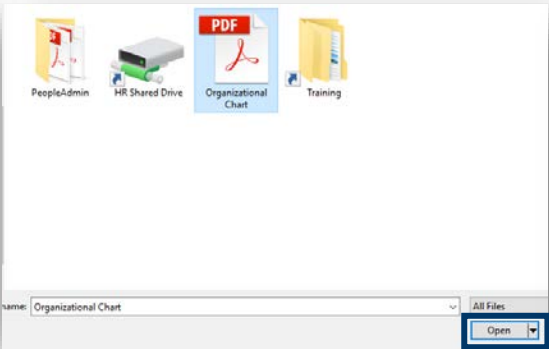
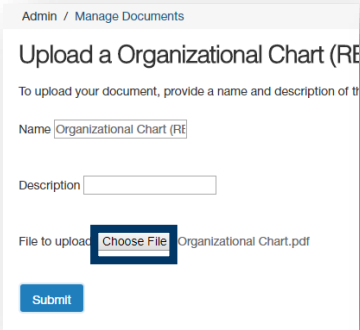
Position Documents Page

All staff position requests must have an **organizational chart** attached.

To attach an organizational chart, hover your cursor over the **Actions** button. In the short list that appears, click on **Upload New**.



Click on **Choose File**, navigate to the organizational chart, select the document, click **Open**, and click **Submit**.



If you need to add additional documentation to the page for the position, hover your cursor over the applicable **Actions** button(s) and complete the steps above.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

Summary Page

This is a summary of all the information you have input up to this point. Look over the summary to make sure the information looks the way you want it to.

New Position Description: Office Specialist 2 (Staff) Edit

Current Status: Draft

Position Type: Staff

Department: President's Office

Created by: Hootie Owl

Owner: Hootie Owl

Summary

History

Settings

✔ Position Justification Edit

Position Justification

Justification of Need

The President's Office is in need of office support...
Currently: blank

✔ Classification Selection Edit

A position request is ready to submit when all of the pages in the page list on the left side of your screen have a check mark next to them.

Not Ready to Submit

Editing Position Request

✔ Position Justification

✔ Classification Selection

✖ Position Details

✖ Budget Summary

✔ Physical Requirements ...

✔ Employee

✔ Supervisory Position

✔ Position Documents

Position Request Summary

Ready to Submit

Editing Position Request

✔ Position Justification

✔ Classification Selection

✔ Position Details

✔ Budget Summary

✔ Physical Requirements ...

✔ Employee

✔ Supervisory Position

✔ Position Documents

Position Request Summary

There are a couple options for reviewing:

- Review the entire summary from the current page.
- Enter the edit mode and review section by section.

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

Position Requests / ... / New Position Description / New Position definition / Summary

New Position Description: Office Specialist 2 (Staff) Edit

Current Status: Draft

Position Type: Staff

Created by: Hootie Owl

✔ Position Details Edit

Classification Information

Classification Title

Office Specialist 2

Class Code

C0104

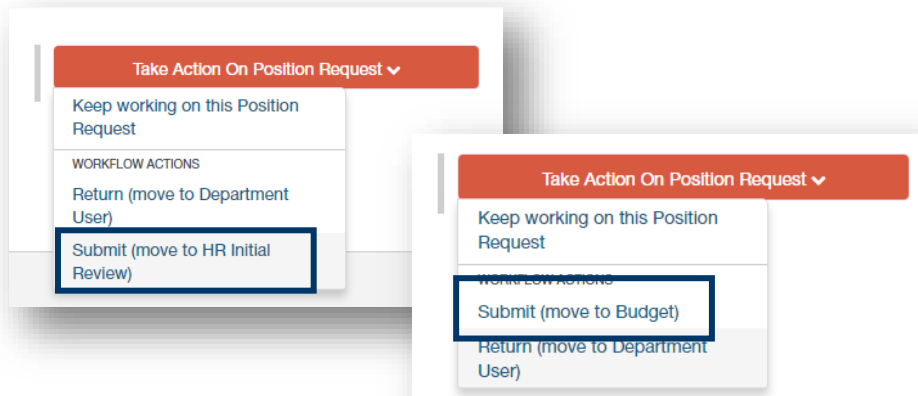
September 2018

[Return to Beginning of Document](#)

23

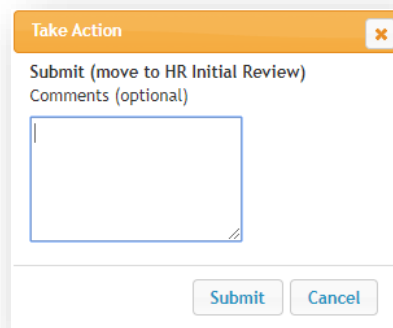
Once the position request is complete, navigate to the **Take Action On Position Request** button in the upper right corner of the screen and select:

- **Staff:** Submit (move to HR Initial Review).
- **Faculty:** submit (move to Budget).
- As needed, you can also return the posting to the Department User by selecting **Return (move to Department User)**. Follow up with the Department 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 opt to add the item to your watch list, it will show up on your Home page under your Watch List.

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.

End of Section

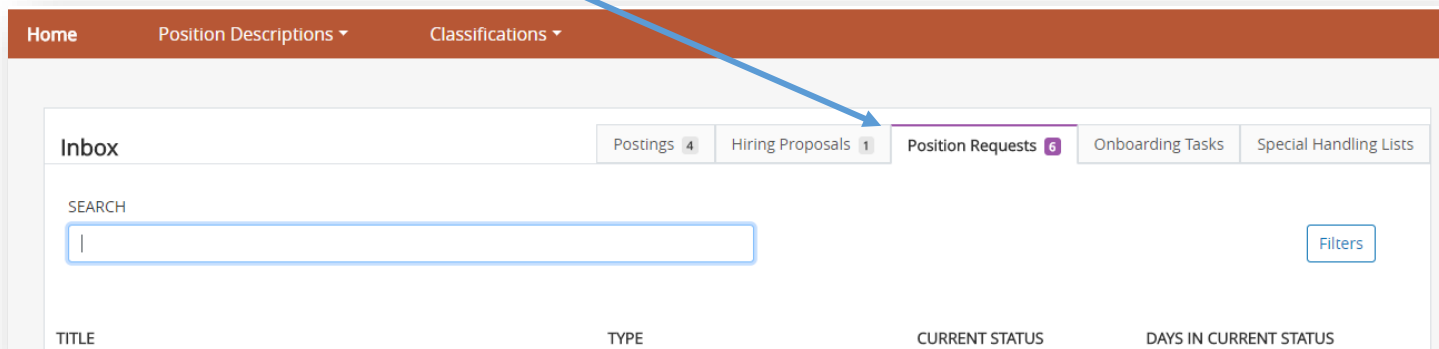
Reviewing Position Requests

Use this section of the guide when a departmental user has created the position request.

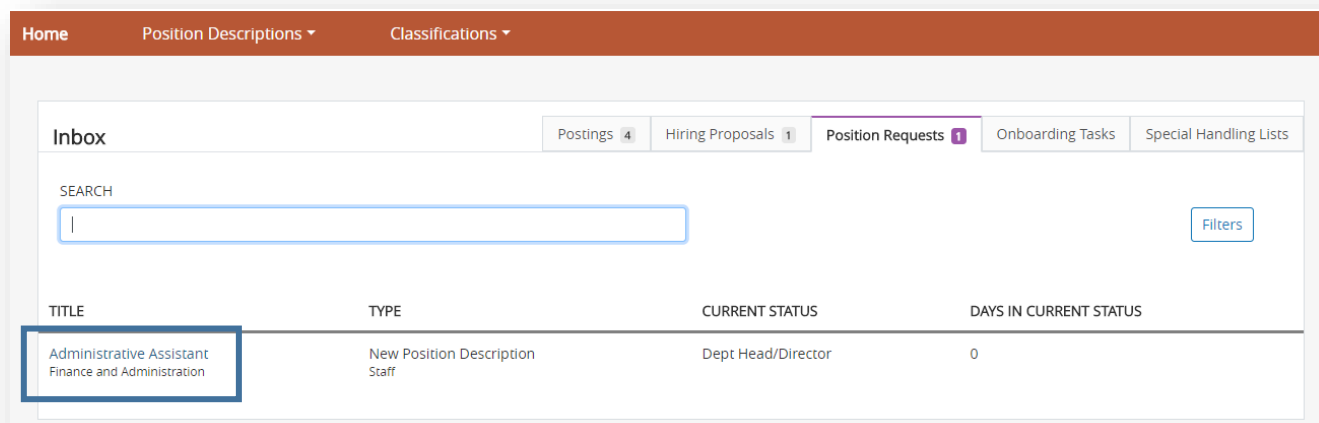
If the position request was created by the department chair/director role, this section can be skipped.

Position requests that have been forwarded to the Department Head/Director queue can be quickly accessed from the home page.

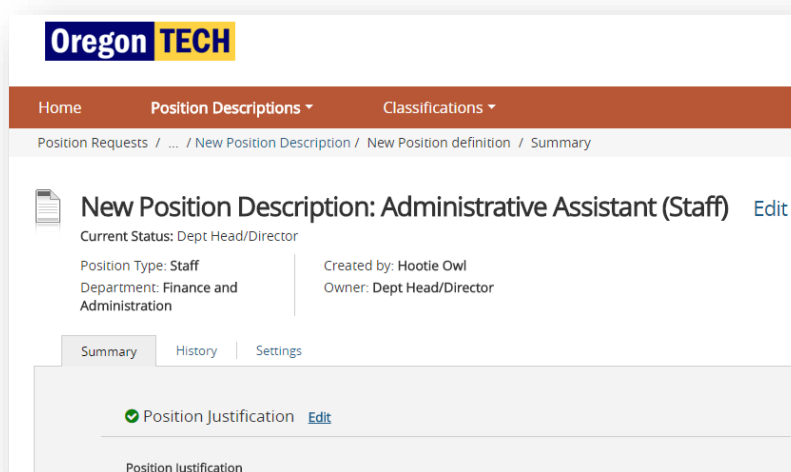
In your inbox, click on the **Position Requests** tab.



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 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.

Position Requests / ... / New Position Description / New Position definition / Summary

New Position Description: Office Specialist 2 (Staff) **Edit**

Current Status: Draft

Position Type: Staff
Department: President's Office

Created by: Hootie Owl
Owner: Hootie Owl

Summary History Settings

✓ Position Details **Edit**

Classification Information

Classification Title	Office Specialist 2
Class Code	C0104

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 to the **Department Comments** field with any information that may be helpful for the Dean/VP approver and/or Budget approver roles as needed.

Position

Department Comments

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**: Submit (move to HR Initial Review).
- **Faculty**: submit (move to Budget).
- As needed, you can also return the posting to the Department User by selecting **Return (move to Department User)**. Follow up with the Department User as to why you are returning it (e.g. changes, additions, removals).

Take Action On Position Request ▼

Keep working on this Position Request

WORKFLOW ACTIONS

Return (move to Department User)

Submit (move to HR Initial Review)

Take Action On Position Request ▼

Keep working on this Position Request

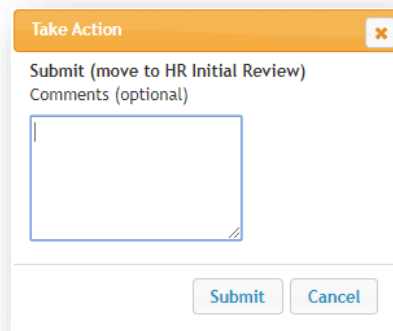
WORKFLOW ACTIONS

Submit (move to Budget)

Return (move to Department User)

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.

A screenshot of a 'Take Action' dialog box. The title bar is orange with the text 'Take Action' and a close button. The main content area is white and contains the text 'Submit (move to HR Initial Review)' and 'Comments (optional)' above a large text input field. At the bottom, there are two buttons: 'Submit' and 'Cancel'.

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

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.

End of Section

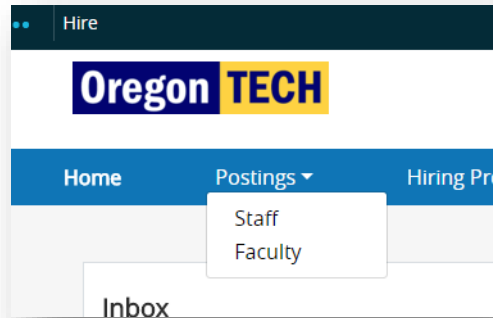
Creating Postings

Items with an * indicate that they will be visible to applicants once the position is posted at <https://jobs.oit.edu/>.

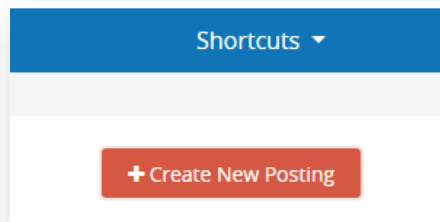
Initial Steps

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

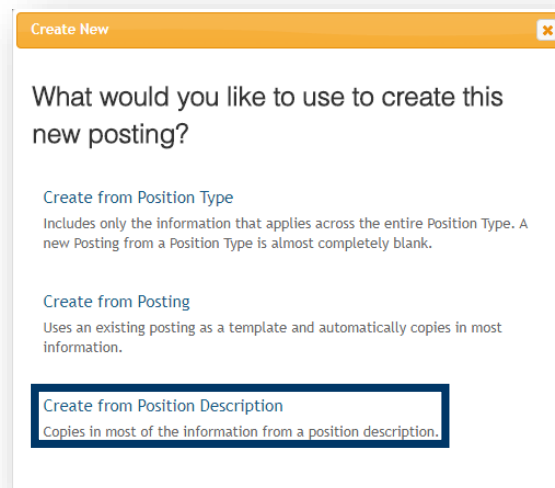
Click on **Postings** and select **Staff** or **Faculty**, whichever position for which you need to start a posting.



Click on the **+Create New Posting** button in the upper right corner of the next screen.



Click **Create from Position Description** in the pop up screen.



Find the position description in the list on the screen OR use the search function to find the position description.

Once you find the position description, click on the Working Title.

Staff Position Descriptions

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

Saved Searches ▾

Search

More Search Options ▾

Staff Positions ✕

"Staff Positions" 4 Selected records 0 ✕ Clear selection?

Working Title	Position Number	Employee Last Name	Employee First Name	Department	Supervisor
Office Specialist 2	S00006PD			President's Office	

This pulls up the position description. In the upper right corner, click on **+Create Posting from this Position Description** to start the posting.

+ Create Posting from this Position Description

Print Preview (Employee View)

Print Preview

View Supervisor

Modify Position Description

Most of the information on the next page pulls from the information in the position description.

Postings / Staff / New Posting

New Posting

* Required Information

Working Title

Office Specialist 2

Organizational Unit

Division

President's Office ▾

Department

President's Office ▾

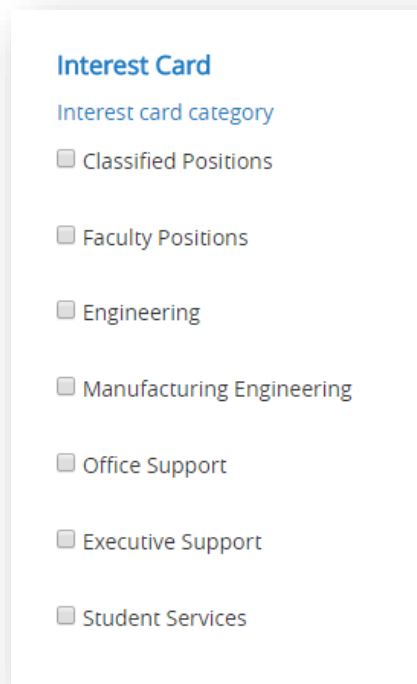
Applicant Workflow

Workflow State

Review by HR ▾

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

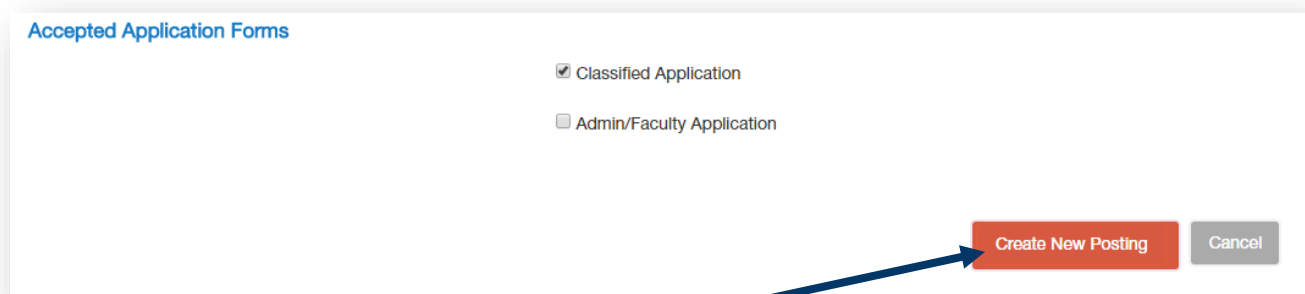
Select all applicable Interest Card categories. At the time the posting is approved to go live at <https://jobs.oit.edu>, HEROES will automatically email candidates that have signed up to receive notifications when selected categories of Oregon Tech jobs are posted.



A white rectangular form with a blue header "Interest Card". Below the header is the label "Interest card category" in blue. There are seven checkboxes, each followed by a category name: "Classified Positions", "Faculty Positions", "Engineering", "Manufacturing Engineering", "Office Support", "Executive Support", and "Student Services". All checkboxes are currently unchecked.

Near the bottom of the page is the **Accepted Application Forms** section.

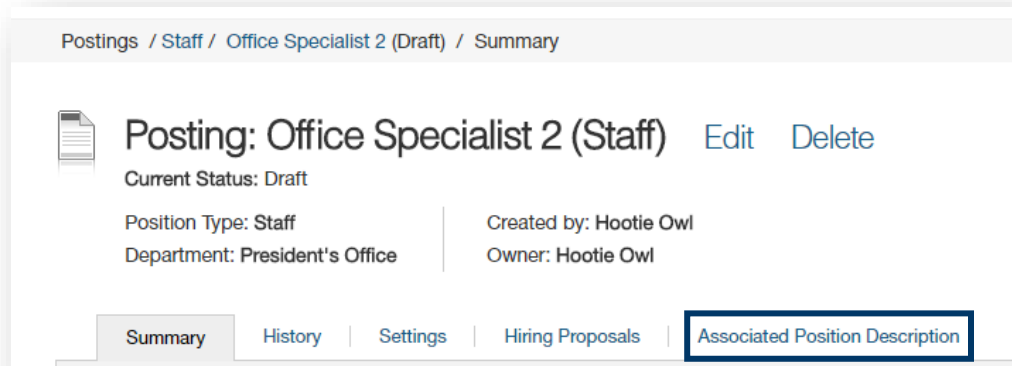
- Select the **Classified Application** checkbox for **classified** recruitments.
- Select the **Admin/Faculty Application** for **unclassified staff** recruitments.



A white rectangular form with a blue header "Accepted Application Forms". Below the header are two checkboxes: "Classified Application" (checked) and "Admin/Faculty Application" (unchecked). At the bottom right of the form are two buttons: a red "Create New Posting" button and a grey "Cancel" button. A blue arrow points from the text below to the "Create New Posting" button.

Then click on the **Create New Posting** button (buttons located on the top and bottom of the screen).

If you need to access the position description while you are in the Hire module, the system provides a shortcut. From the summary page, navigate to and click on **Associated Position Description**.



Posting Details Page

Many of the fields in this section either default from the system set up or feed over from the position description.

*For FACULTY recruitments, select the **Position Type** from the drop down.

A screenshot of a 'Position Information' form. The form is titled 'Position Information' and has a red asterisk indicating required information. The 'Position Type' field is a dropdown menu with options: 'Please select', 'Please select', 'Tenure Track', 'Non Tenure' (selected), and 'Adjunct'. Other fields include 'Working Title', 'Classification Title', 'Instructor', 'College/Division', and 'College of Health, Arts & Sci'. The form is part of a larger page with a sidebar on the left containing the word 'members'.

*The first block of information, **Position Information**, feeds over from the position description.

Postings / Staff / Office Specialist 2 (Draft) / Edit: Posting Details

Editing Posting

Posting Details

✔ Budget Summary

✔ Supplemental Questions

✔ Applicant Documents

✔ Guest User

✔ Posting Documents

✔ Search Committee Members

Summary

Posting Details

ABC [Check spelling](#)

To create a Posting, first complete the information on the Posting to the office of Human Resources, you must go to the summary page appears, hover your mouse over the orange asterisk.

*** Required Information**

Position Information

Position Type	Classified
Working Title	Office Specialist 2
Classification Title	Office Specialist 2
College/Division	Office of the Provost
Department	General Instruction
Hiring Unit	
Work Location	Klamath Falls
Position Terms/Mo	12
Full/Part time	Full Time
Appointment FTE (%)	1.00
Exempt/Non-Exempt	Non-Exempt

*Enter a description about the department in the **Department Information** field. Draft descriptions for each department are located at the “Department Descriptions” link under the Department Information field.

★ Department Information

This field is required.

[Department Descriptions](#)

*As needed, adjust information about the position in the **Position Summary** field. This will provide applicants with some helpful descriptive information about the department in which the position works.

*The rest of the information in the **Position Information** section is either hard-coded or a system default.

*Select the appropriate recruitment type from the **Recruitment Type** dropdown.

Written approval for internal recruitments must be obtained from the Provost for Faculty and the Associate Vice President, Human Resources for Staff.

Posting Detail Information

Position Number 99780

★ Recruitment Type Please select ▼
This field is required.

*Enter the anticipated starting annual salary or the anticipated starting annual salary range. Guidance for completing this field is located at the [Salary Posting Guide](#) link under the Annual Salary field.

★ Annual Salary This field is required.
[Salary Posting Guide](#)

*Click on the blank **Posting Open Date** field; a calendar will open. Select the date you would like the posting to open (no later than the day you create the posting) from the calendar.

★ Posting Open Date

★ Application Screening Begins

★ Posting Close Date

Open Until Filled

Calendar: Sep 2017

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

*Click on the blank **Application Screening Begins** field; a calendar will open. Select the date it is anticipated that application review will begin from the calendar.

Application Screening Begins

Posting Close Date

Open Until Filled

Special Instructions to Applicant

Calendar: Sep 2017

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

*Click on the blank **Posting Close Date** field; a calendar will open. Select the date posting will close from the calendar. *If the posting will be open until filled, leave this field blank.*

Posting Close Date

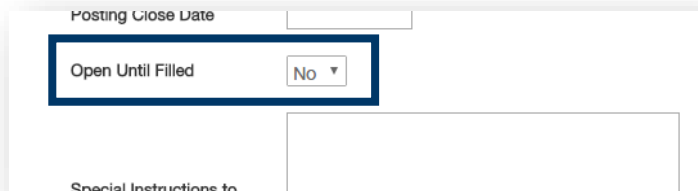
Open Until Filled

Special Instructions to Applicant

Calendar: Sep 2017

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Indicated whether the recruitment will be open until filled from the **Open Until Filled** field. *If the posting will be open until filled, you must select yes.*

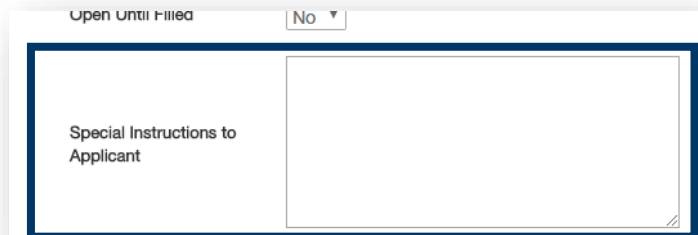


Posting Close Date

Open Until Filled No ▾

Special Instructions to

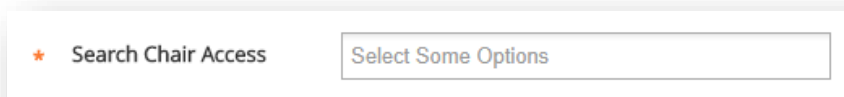
*Enter any required information into the **Special Instructions to Applicant** box.



Open Until Filled No ▾

Special Instructions to Applicant

Type the Search Chair's name into the Search Chair Access box. If the Search Chair's name does not show up in the list, enter Sandi Hanan or Kim Cholewinski. After the Search Chair has complete the requisite trainings, the Office of Human Resources will enter their name into this field.



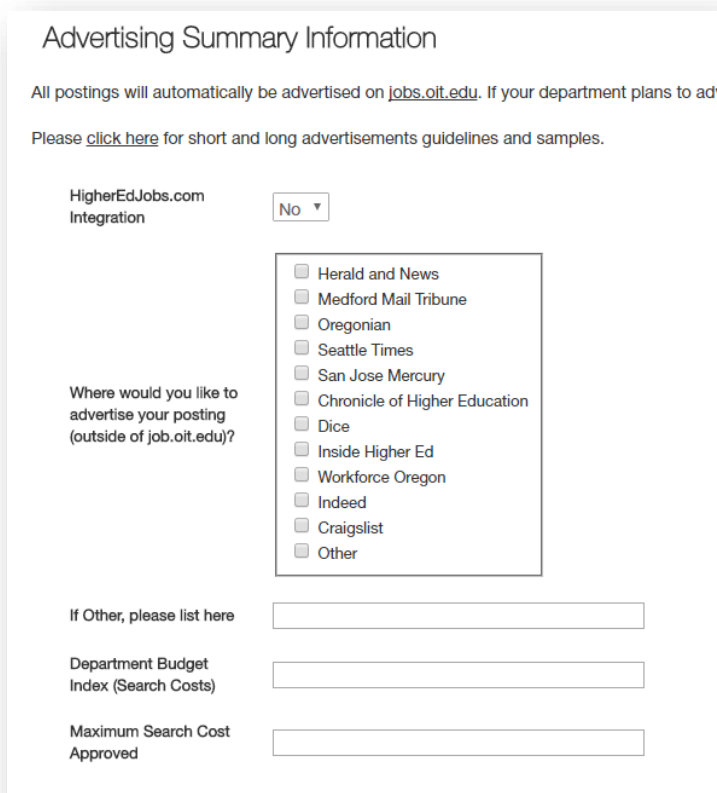
★ Search Chair Access

Select Some Options

The rest of the information in the **Posting Information** section is either hard-coded or a system default.

Complete the **Advertising Summary Information** section.

After posted to <https://jobs.oit.edu>, all jobs will be posted to facebook, LinkedIn, and Twitter accounts managed by the Office of Human Resources. Links to these social media pages are available at <https://www.oit.edu/faculty-staff/human-resources/hr-social-media>.



Advertising Summary Information

All postings will automatically be advertised on jobs.oit.edu. If your department plans to ad

Please [click here](#) for short and long advertisements guidelines and samples.

HigherEdJobs.com Integration No ▾

Where would you like to advertise your posting (outside of job.oit.edu)?

- ☐ Herald and News
- ☐ Medford Mail Tribune
- ☐ Oregonian
- ☐ Seattle Times
- ☐ San Jose Mercury
- ☐ Chronicle of Higher Education
- ☐ Dice
- ☐ Inside Higher Ed
- ☐ Workforce Oregon
- ☐ Indeed
- ☐ Craigslist
- ☐ Other

If Other, please list here

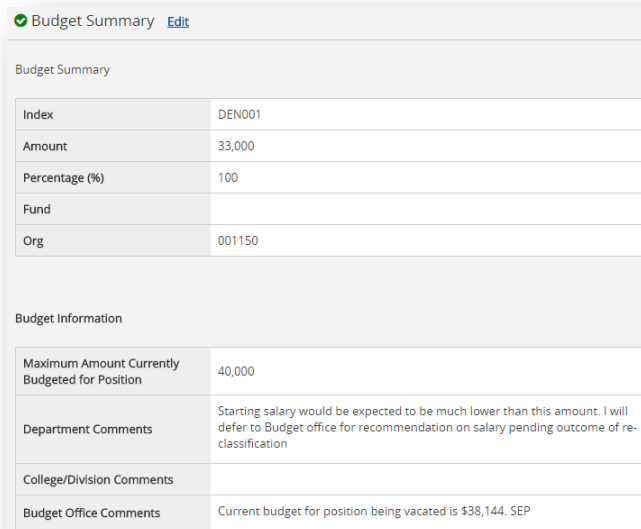
Department Budget Index (Search Costs)

Maximum Search Cost Approved

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the posting.

Budget Summary Page

This section defaults in from the position request. No changes or additions are needed in this section.



✓ Budget Summary [Edit](#)

Budget Summary

Index	DEN001
Amount	33,000
Percentage (%)	100
Fund	
Org	001150

Budget Information

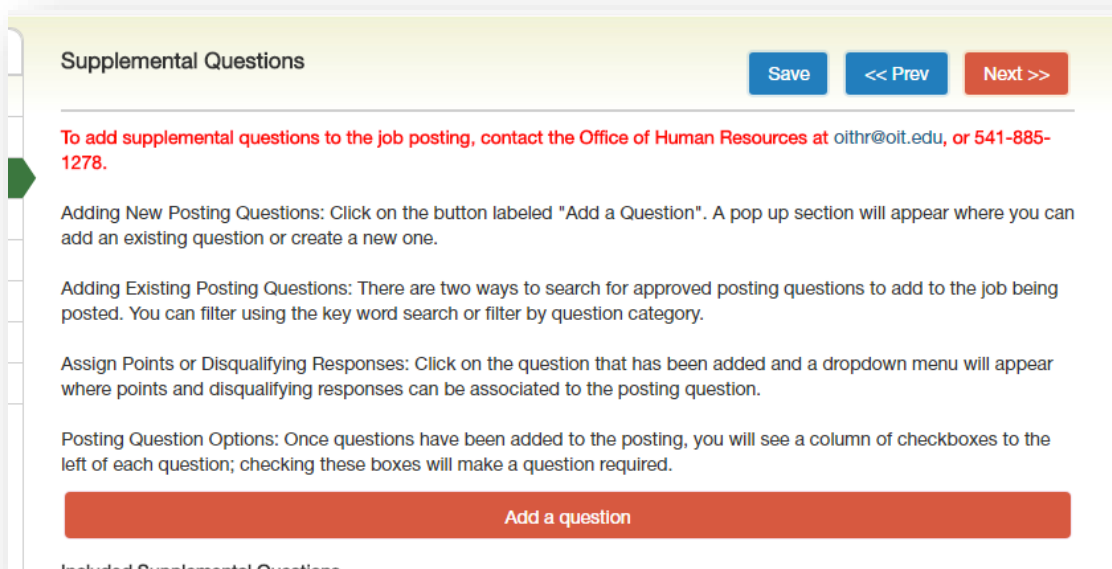
Maximum Amount Currently Budgeted for Position	40,000
Department Comments	Starting salary would be expected to be much lower than this amount. I will defer to Budget office for recommendation on salary pending outcome of re-classification
College/Division Comments	
Budget Office Comments	Current budget for position being vacated is \$38,144. SEP

Click the **Next** button to advance to the next section of the posting.

*Supplemental Questions Page

This section will be completed by Oregon Tech HR based on the qualifications of the position. No changes or additions are needed in this section.

If the search committee or department would like to add additional questions, please contact the Office of Human Resources.



Supplemental Questions [Save](#) [<< Prev](#) [Next >>](#)

To add supplemental questions to the job posting, contact the Office of Human Resources at oithr@oit.edu, or 541-885-1278.

Adding New Posting Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

[Add a question](#)

Included Supplemental Questions

Click the **Next** button to advance to the next section of the posting.

*Applicant Documents Page

Select the optional and required documents for the recruitment by selecting the appropriate radio button. Leave the Not Used radio button selected for documents that do not apply to the position and recruitment.

Order	Name	Not Used	Optional	Required
1	Resume	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2	Cover Letter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3	Transcripts (Unofficial)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Letter of Recommendation	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5	Curriculum Vitae	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Multi-Factor Authentication	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Required: The system will not allow applicants to submit their application until a document is uploaded.

Classified postings cannot require additional documentation.

Optional: The system gives applicants the opportunity to upload a document but applicants can submit their application without attaching a document.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the posting.

Guest User Page

Oregon Tech HR will create guest user accounts for search committee members that are not Oregon Tech employees (e.g. students, community leaders, other professionals outside the University).

For Guest User accounts, contact the Office of Human Resources at oithr@oit.edu or 541.885.1278.

Guest User

Save << Prev Next >>

Guest Users are individuals who are not employed by Oregon Tech (e.g. students, community leaders, other professionals outside the University, etc.) For Guest User accounts, contact the Office of Human Resources at oithr@oit.edu, or 541-885-1278.

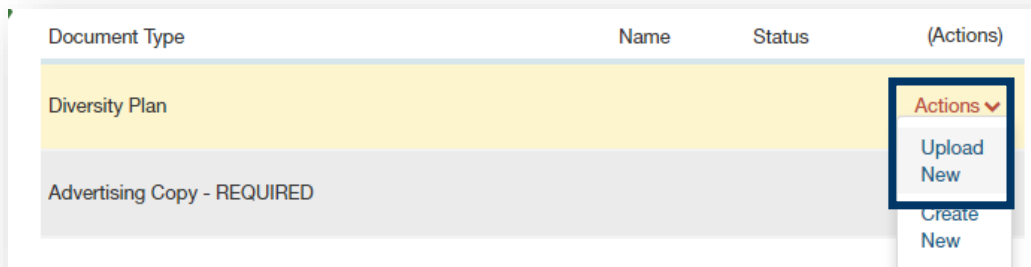
Click on the Create Guest User Account button. The system will automatically generate a Guest Username. You may update the password if needed.

Click the **Next** button to advance to the next section of the posting.

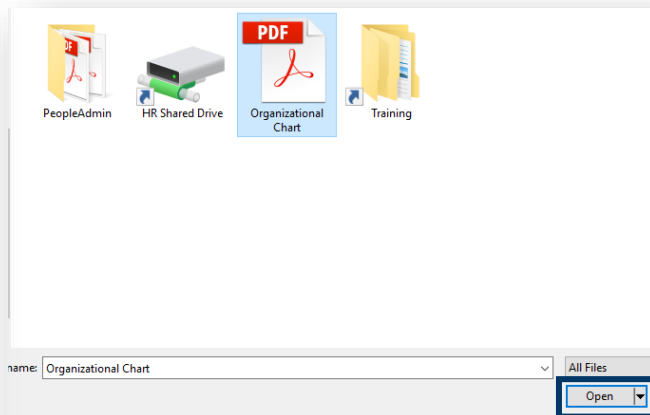
Posting Documents Page

All postings must have a copy of the **advertisement** attached. Sample advertisements, advertising sources, and other advertising resources are located at <https://www.oit.edu/hr/recruitment>.

To attach a copy of the advertisement, hover your cursor over the **Actions** button. In the short list that appears, click on **Upload New**.



Click on **Choose File** and navigate to where the organizational chart is saved. Select the document and click **Open**.

A screenshot of a web form titled 'Upload a Advertising Copy - REQUIRED'. Below the title is the instruction 'To upload your document, provide a name and description of the document.' There are two input fields: 'Name' with the text 'Advertising Copy - REQ' and 'Description' which is empty. Below these is a 'File to upload' section with a 'Choose File' button (highlighted with a blue box) and the text 'No file chosen'. At the bottom is a blue 'Submit' button.

Click the **Submit** button.

A screenshot of the same 'Upload a Advertising Copy - REQUIRED' form. The 'File to upload' section now shows 'Choose File' followed by the text 'PeopleAdmin... Guide.pdf'. The 'Submit' button is highlighted with a blue box.

If you need to add additional documentation to the page for the position, hover your cursor over the applicable **Actions** button(s) and complete the steps above.

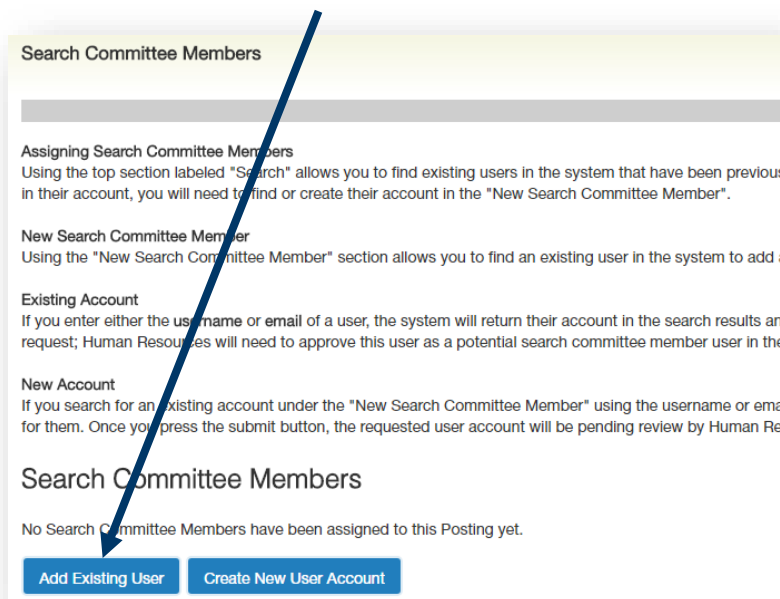
After you finish adding documents, click the **Next** button to save your work and advance to the next section of the posting.

Search Committee Members Page

Use this page to assign members to the search committee. This grants them access to the recruitment.

Search committee members assigned to the recruitment will be sent an email with login and posting information when the position is posted.

To add search committee members, click on **Add Existing User**.



The screenshot shows the 'Search Committee Members' page. It has a yellow header with the title. Below the header, there are instructions for assigning members and creating new accounts. At the bottom, there are two buttons: 'Add Existing User' and 'Create New User Account'. A blue arrow points from the top of the page down to the 'Add Existing User' button.

Search Committee Members

Assigning Search Committee Members
Using the top section labeled "Search" allows you to find existing users in the system that have been previous...
In their account, you will need to find or create their account in the "New Search Committee Member".

New Search Committee Member
Using the "New Search Committee Member" section allows you to find an existing user in the system to add a...

Existing Account
If you enter either the **username** or **email** of a user, the system will return their account in the search results and...
request; Human Resources will need to approve this user as a potential search committee member user in the...

New Account
If you search for an existing account under the "New Search Committee Member" using the username or email...
for them. Once you press the submit button, the requested user account will be pending review by Human Re...

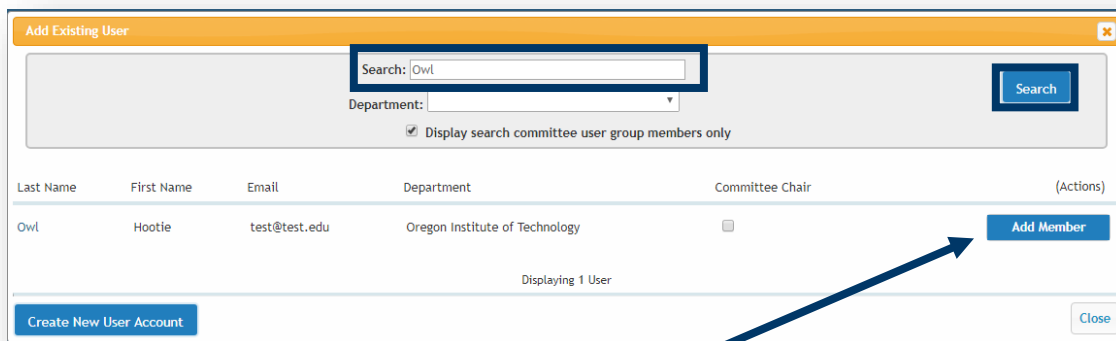
Search Committee Members

No Search Committee Members have been assigned to this Posting yet.

[Add Existing User](#) [Create New User Account](#)

Enter search criteria (first name, last name and/or email address) into the search area and then click on the **Search** button.

If no match appears, retry your search, or move on to the next committee member name.



The screenshot shows the 'Add Existing User' dialog box. It has a search bar with 'Owl' entered, a department dropdown, and a 'Search' button. Below the search bar, there is a table with columns: Last Name, First Name, Email, Department, Committee Chair, and (Actions). The table shows one user: Owl, Hootie, test@test.edu, Oregon Institute of Technology, and a checkbox. At the bottom, there is a 'Create New User Account' button and a 'Close' button. A blue arrow points from the 'Add Member' button in the table to the 'Add Member' button at the bottom right of the dialog box.

Add Existing User

Search: [Search](#)

Department:

☒ Display search committee user group members only

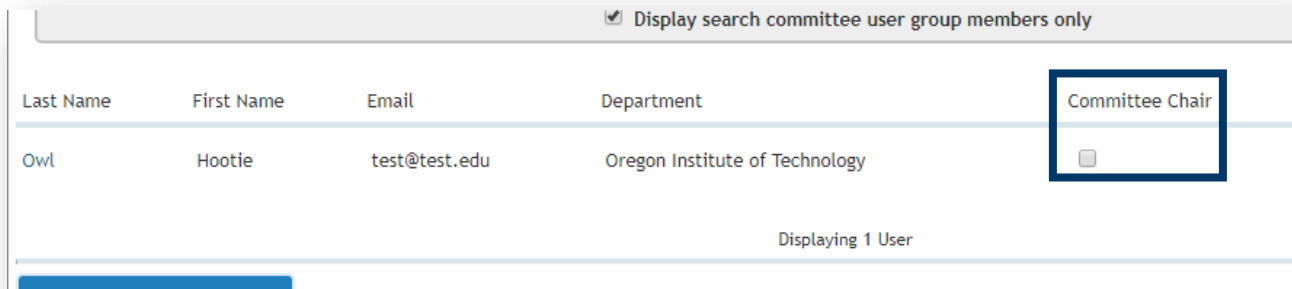
Last Name	First Name	Email	Department	Committee Chair	(Actions)
Owl	Hootie	test@test.edu	Oregon Institute of Technology	<input type="checkbox"/>	Add Member

Displaying 1 User

[Create New User Account](#) [Close](#)

If the correct match appears, click on **Add Member**.

To assign a committee member as the search committee chair, check the **Committee Chair** box before you click on **Add Member**.



The screenshot shows a table with the following columns: Last Name, First Name, Email, Department, and Committee Chair. A single user is listed: Owl, Hootie, test@test.edu, Oregon Institute of Technology. The 'Committee Chair' column has a checkbox that is currently unchecked. A blue box highlights this checkbox. Above the table is a toggle switch labeled 'Display search committee user group members only'. Below the table, it says 'Displaying 1 User'.

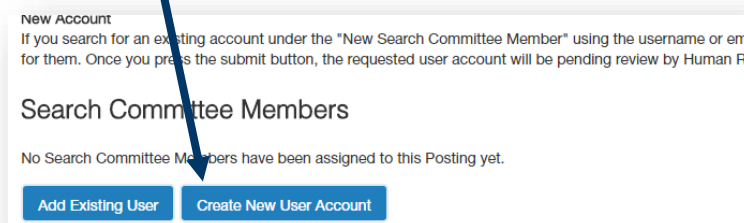
Last Name	First Name	Email	Department	Committee Chair
Owl	Hootie	test@test.edu	Oregon Institute of Technology	<input type="checkbox"/>

Displaying 1 User

The **Create New User Account** function is used to request access to a recruitment for the purpose of serving as a Search Committee Member. ONLY regular status faculty, classified staff, unclassified staff, and administrators with will be approved for the search committee member role.

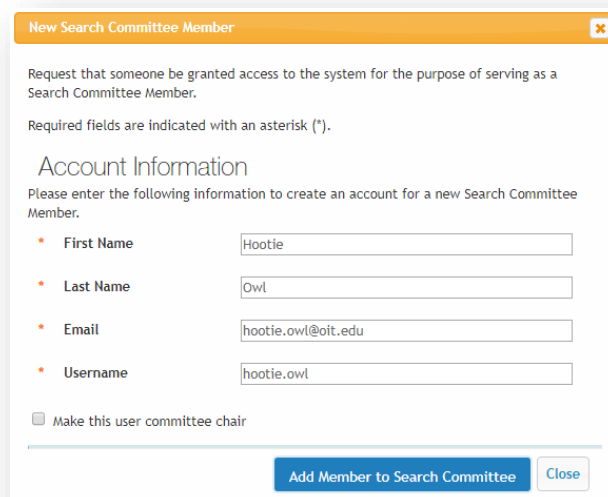
Please DO NOT submit requests for students, temporary staff, other appointment types, or any non-Oregon Tech stakeholders. Contact the Office of Human Resources with a request to give these committee members guest user access.

To request access, click on the **Create New User Account** button.



The screenshot shows a dialog box titled 'New Account'. It contains the text: 'If you search for an existing account under the "New Search Committee Member" using the username or email for them. Once you press the submit button, the requested user account will be pending review by Human Resources.' Below this is the section 'Search Committee Members' with the text 'No Search Committee Members have been assigned to this Posting yet.' At the bottom are two buttons: 'Add Existing User' and 'Create New User Account'. A blue arrow points from the 'Create New User Account' button in the previous screenshot to this button.

Enter the new user's **first name**, **last name**, **email**, and **Oregon Tech username**. Then click the **Add Member to Search Committee** button.



The screenshot shows a form titled 'New Search Committee Member'. It contains the following text: 'Request that someone be granted access to the system for the purpose of serving as a Search Committee Member. Required fields are indicated with an asterisk (*).' Below this is the section 'Account Information' with the text 'Please enter the following information to create an account for a new Search Committee Member.' The form has four required fields: First Name (Hootie), Last Name (Owl), Email (hootie.owl@oit.edu), and Username (hootie.owl). There is a checkbox labeled 'Make this user committee chair' which is currently unchecked. At the bottom are two buttons: 'Add Member to Search Committee' and 'Close'.

A request will be sent to the HR Admin role for approval. Search committee members will receive a system notification when approved and their status will move from pending to approved in this section.

Click the **Next** button to advance to the next section of the posting.

Summary Page

This is a summary of all the information that has been input up to this point. Look over the summary to make sure the information looks the way you want it to.



Postings / Staff / Office Specialist 2 (Draft) / Summary

Posting: Office Specialist 2 (Staff) [Edit](#)

Current Status: Draft

Position Type: Staff
Department: President's Office

Created by: Hootie Owl
Owner: Hootie Owl

[Summary](#) | [History](#) | [Settings](#) | [Hiring Proposals](#) | [Associated Position Description](#)

Please review the details of the Posting below. Page titles prefaced with an X and highlighted in RED have errors action on the Posting using the actions listed in the Workflow actions for this posting pane.

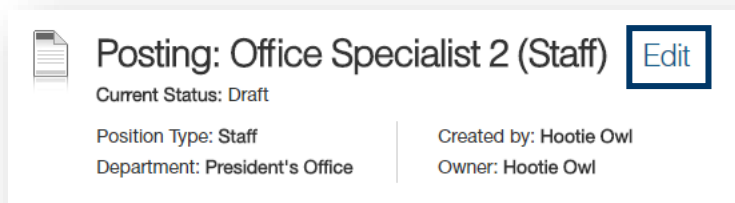
✓ Posting Details [Edit](#)

Position Information

There are a couple options for reviewing:

- Review the entire summary from the current page.
- Enter the edit mode and review section by section.

If you discover that edits need to be made, click the **Edit** button next to the position 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.

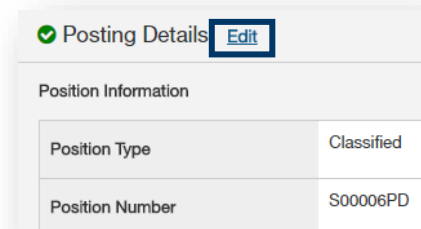


Posting: Office Specialist 2 (Staff) [Edit](#)

Current Status: Draft

Position Type: Staff
Department: President's Office

Created by: Hootie Owl
Owner: Hootie Owl



✓ Posting Details [Edit](#)

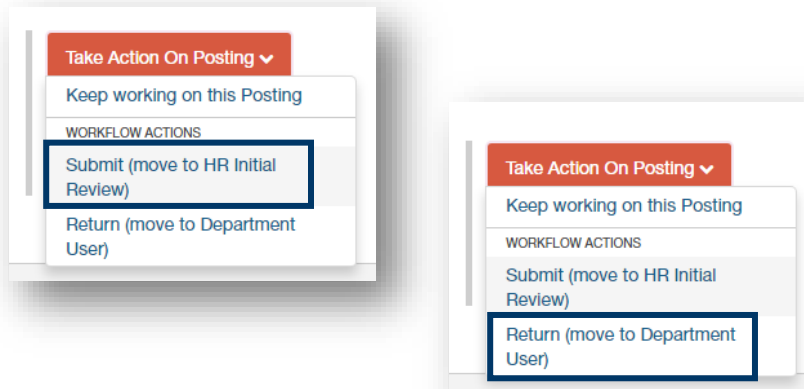
Position Information

Position Type	Classified
Position Number	S00006PD

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.

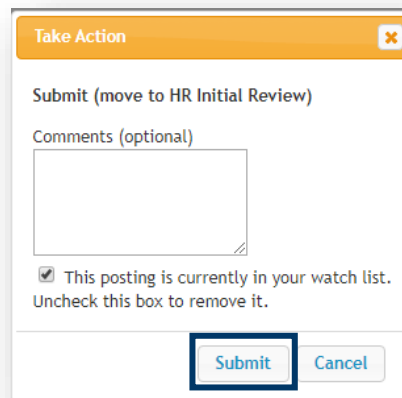
Once the posting is complete, navigate to the **Take Action On Posting** button in the upper right corner of the screen and select **Submit (move to HR Initial Review)**.

As needed, you can also return the posting to the Department User by selecting **Return (move to Department User)**. Follow up with the Department 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 opt to add the item to your watch list, it will show up on your Home page under your Watch List.

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.

End of Section

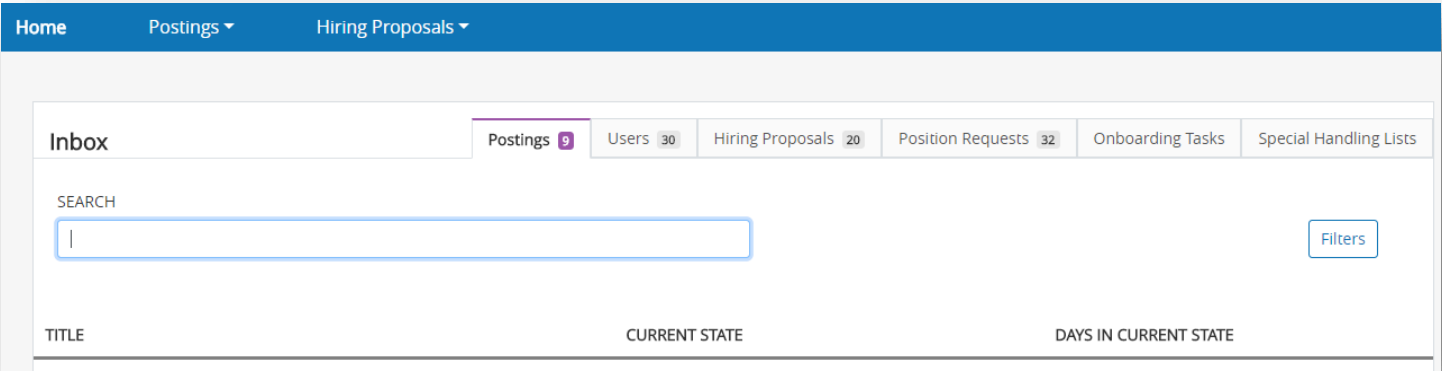
Reviewing Postings

Use this section of the guide when a departmental user has created the posting.

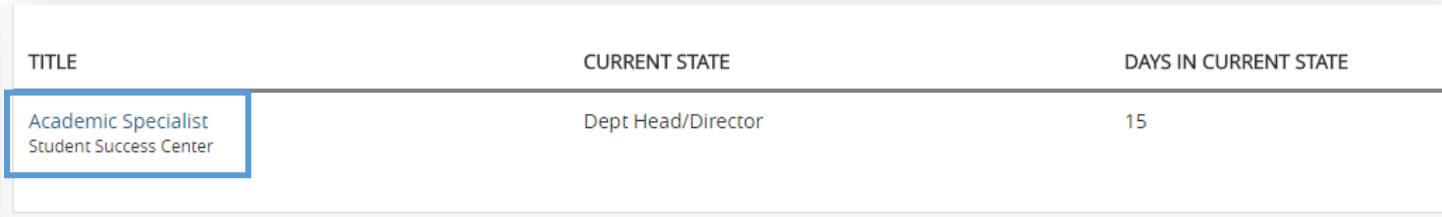
If the posting was created by the department chair/director role, this section can be skipped.

Postings that have been forwarded to the Department Head/Director queue can be quickly accessed from the home page.

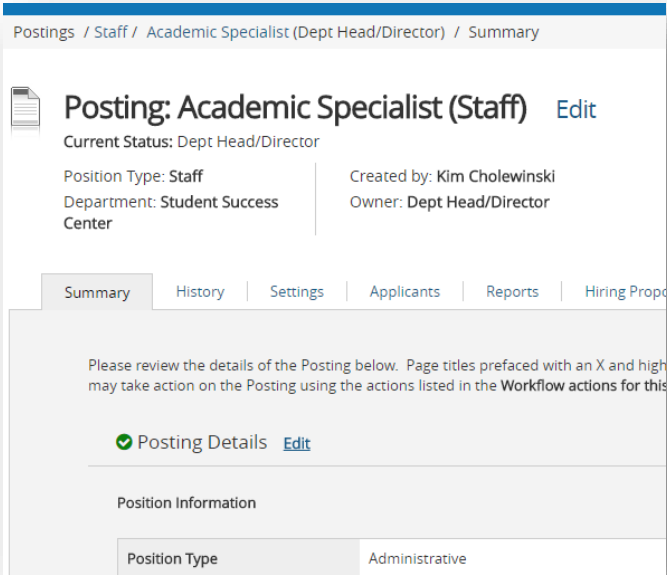
In your inbox, the **Posting** tab opens by default. If it doesn't, click on the **Posting** tab (and then click on Staff or Faculty, whichever is applicable) to access postings that are in your queue.



And then click on the **Title**.



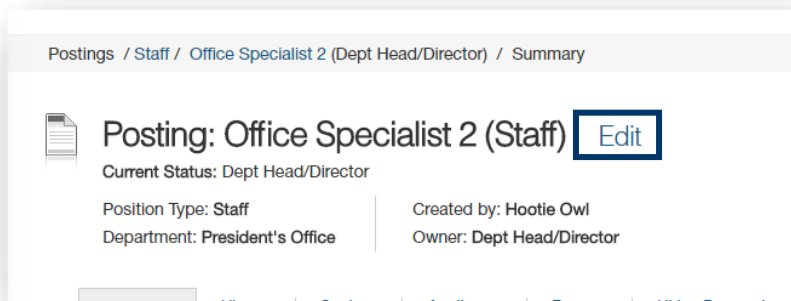
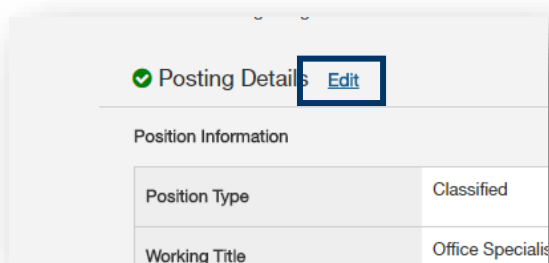
Clicking on the link will open the summary page of the posting.



There are a couple options for reviewing:

- Review the entire summary from the current page.
- Enter the edit mode and review section by section.

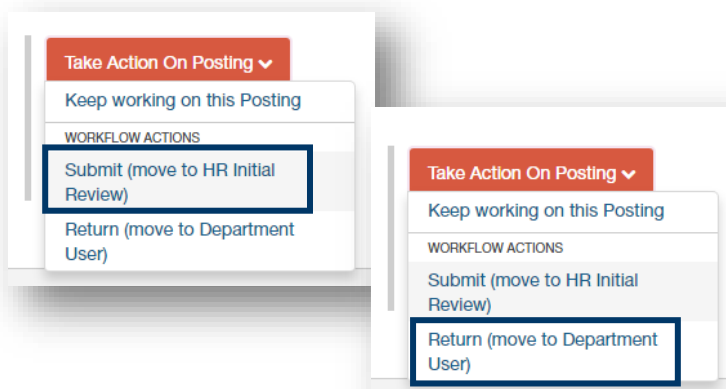
If you would like to review section by section, click the **Edit** button next to the position title at the top of the screen OR you can open the specific section by clicking the **Edit** button next to the section title.



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

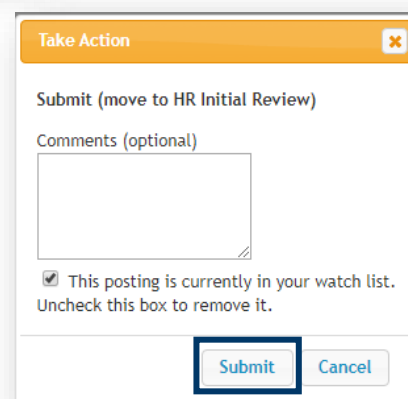
Once the posting is complete, navigate to the **Take Action On Posting** button in the upper right corner of the screen and select **Submit (move to HR Initial Review)**.

As needed, you can also return the posting to the Department User by selecting **Return (move to Department User)**. Follow up with the Department 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 opt to add the item to your watch list, it will show up on your Home page under your Watch List.

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.

[End of Section](#)

Creating Hiring Proposals

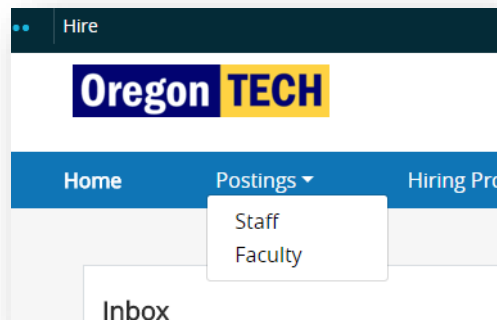
Initial Steps

When the search committee submits the official recommendation for hire, HEROES will send an email to the Department User and Department Head/Director for that unit. The email is a prompt to begin the hiring proposal.

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

The first step is to find the specific posting that needs a hiring proposal started.

Click on **Postings** and select **Staff** or **Faculty**, whichever classification for which you need to start a hiring proposal.



Once you find the correct posting, click on the **Working Title**.

<input type="checkbox"/>	Working Title	Po
<input type="checkbox"/>	Administrative Program Specialist	99
<input type="checkbox"/>	Accountant 1 (Grant & Fixed Asset Accountant)	99

Click on **Applicants**.

Postings / Staff / Administrative Program Specialist (Filled) / Summary

Posting: Administrative Program Specialist (Staff)

Current Status: Filled

Position Type: Staff | Created by: Adam Oppegaard
Department: Business Affairs | Owner: Human Resources

Summary | History | **Applicants** | Reports | Hiring Proposals | Associated P

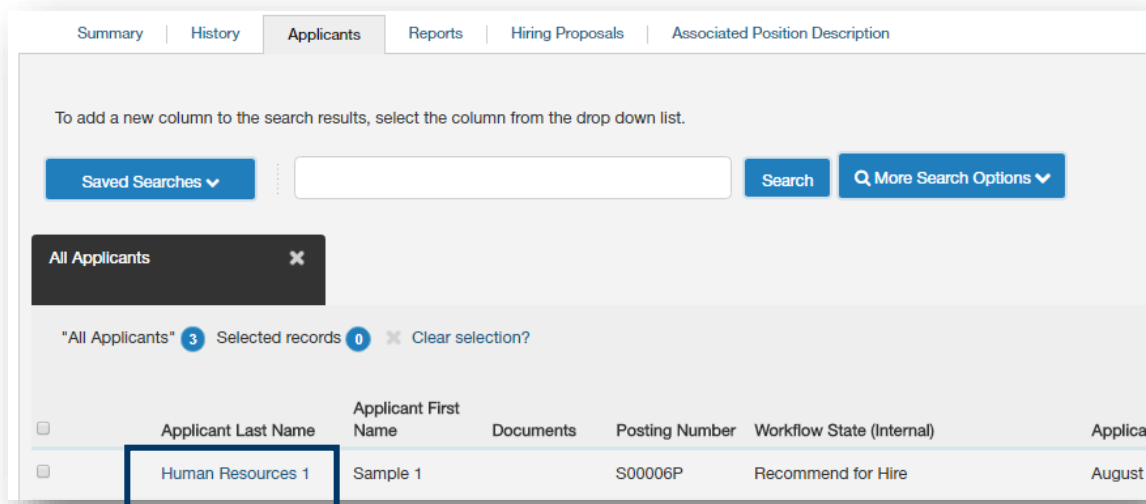
Please review the details of the Posting below. Page titles prefaced with an X and highlighted in blue may take action on the Posting using the actions listed in the **Workflow actions for this posting**

✔ Posting Details

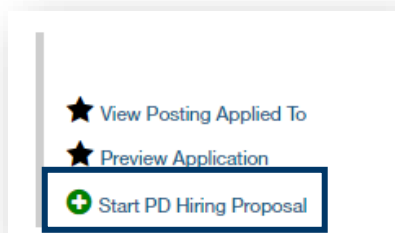
Position Information

Position Type	Classified
Working Title	Administrative Program Specialist

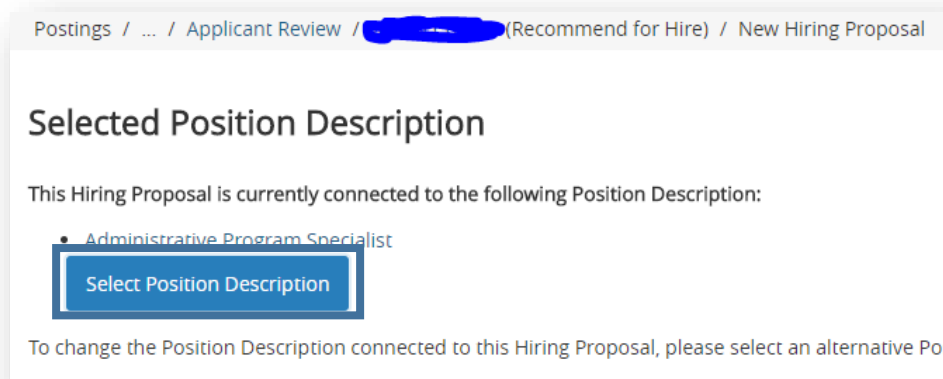
Find the applicant that was Recommended for Hire and click on the **Applicant Last Name** link.



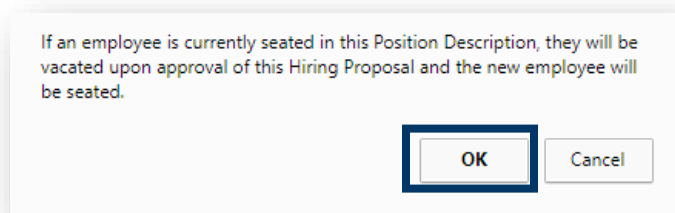
Click on the **+Start PD Hiring Proposal** button in the upper right corner of the next screen.



The next screen is how the system connects an applicant to a position description. Scroll to the bottom of the screen and click on **Select Position Description**. By getting to this screen through the applicant list in the posting, the position description is already selected. Clicking on other links in this screen will not select the position description to which and applicant will be tied.



Click on **OK** on the pop up screen.



Hiring Proposal Page

Much of the information in the hiring proposal feeds from the application and the position description. The **Applicant Information** field will be pre-populated.

iring Proposal / Office Specialist 2 / Edit

Hiring Proposal

[Check spelling](#)

* Required Information

Applicant Information

First Name	Hootie
Middle Name	T.
Last Name	Owl
Address1	123 Hustlin' Owls Drive
Address2	
City	Klamath Falls
State	OR
Zip Code	45615291
Primary Phone	5415555555
Secondary Phone	5415555555
Email	hootie@oit.edu

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the hiring proposal.

In the **Hiring Proposal Information** section, enter the starting salary and if there is approval to offer university paid moving expenses.

Hiring Proposal Information

Hiring Proposal Number

Proposed Starting Salary Requested This field is required.

Approved Starting Salary (HR)

Actual Start Date

Approved University Paid Moving Expenses? This field is required.

If yes, how much

Other Hiring Proposal Information

If there are approved university paid moving expenses, complete the **If yes, how much** field.

Enter information into the Other Hiring Proposal Information field as necessary.

The information in the **Position Information**, **Position Budget Information**, and **Additional Budget Information** section is either hard-coded or a system default.

[Hiring Proposal Documents Page](#)

Attach any necessary documentation to this page.

Hiring Proposal Documents

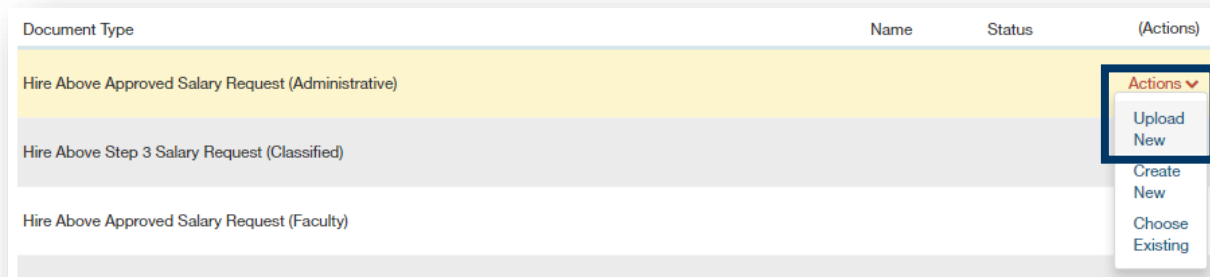
Save << Prev Next >>

PDF conversion must be completed for the document to be valid when applicable.

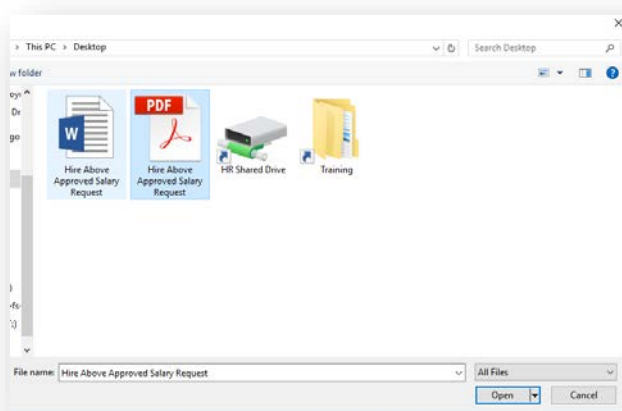
Document Type	Name	Status	(Actions)
Hire Above Approved Salary Request (Administrative)			Actions ▼
Hire Above Step 3 Salary Request (Classified)			Actions ▼
Hire Above Approved Salary Request (Faculty)			Actions ▼
Direct Appointment			Actions ▼

Save << Prev Next >>

To attach a copy of the advertisement, hover your cursor over the **Actions** button. In the short list that appears, click on **Upload New**.



Click on **Choose File** and navigate to where the document is saved. Select the document and click **Open**.

A screenshot of a web form titled 'Upload a Hire Above Approved Salary Request (Administrative)'. The form has a breadcrumb trail: 'Postings / ... / Applicant Review / Hootie Owl (Recommend for Hire) / Edit Hiring Proposal'. Below the title, it says 'To upload your document, provide a name and description of the document. To choose a file to upload, click the Choose File button.' There are two input fields: 'Name' (containing 'Hire Above Approved Salary Request') and 'Description' (empty). Below these is a 'File to upload' section with a 'Choose File' button. At the bottom is a blue 'Submit' button.

Click the **Submit** button.

A screenshot of the same web form as before, but now the 'File to upload' section shows the selected file 'Hire Above ...Request.pdf' next to the 'Choose File' button. The 'Submit' button is highlighted with a blue box.

If you need to add additional documentation to the page for the position, hover your cursor over the applicable **Actions** button(s) and complete the steps above.

After you finish adding documents, click the **Next** button to save your work and advance to the next section of the hiring proposal.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the hiring proposal.

Summary Page

This is a summary of all the information you have input up to this point. Look over the summary to make sure the information looks the way you want it to.

Staff / ... / Hootie Owl (Recommend for Hire) / PD Hiring Proposal / Summary

PD Hiring Proposal: Hootie Owl (Staff) [Edit](#)

Current Status: Draft

Position Type: Staff
Department: College of Health, Arts & Sciences (HAS)
Applicant: Hootie Owl
Posting: Office Specialist 2

Created by: Hootie Owl
Owner: Hootie Owl

[Summary](#) | [History](#) | [Settings](#) | [Reports](#)

Hiring Proposal [Edit](#)

Applicant Information

First Name	Hootie
Middle Name	T.
Last Name	Owl
Address1	123 Hustlin' Owls Drive
Address2	
City	Klamath Falls
State	OR
Zip Code	45615291
Primary Phone	5415550005
Secondary Phone	5415550005

There are a couple options for reviewing:

- Review the entire summary from the current page.
- Enter the edit mode and review section by section.

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.

Staff / ... / Hootie Owl (Recommend for Hire) / PD Hiring Proposal / Summary

PD Hiring Proposal: Hootie Owl (Staff) [Edit](#)

Current Status: Draft

Position Type: Staff
Department: College of Health, Arts & Sciences (HAS)
Applicant: Hootie Owl
Posting: Office Specialist 2

Created by: Hootie Owl
Owner: Hootie Owl

Posting: Office Specialist 2

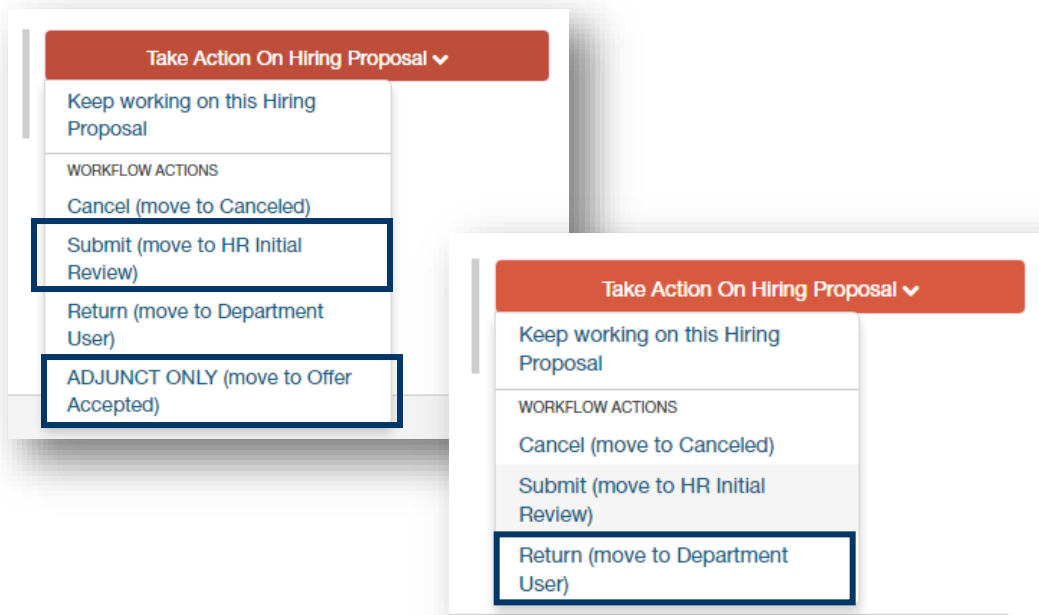
[Summary](#) | [History](#) | [Settings](#) | [Reports](#)

Hiring Proposal [Edit](#)

Applicant Information

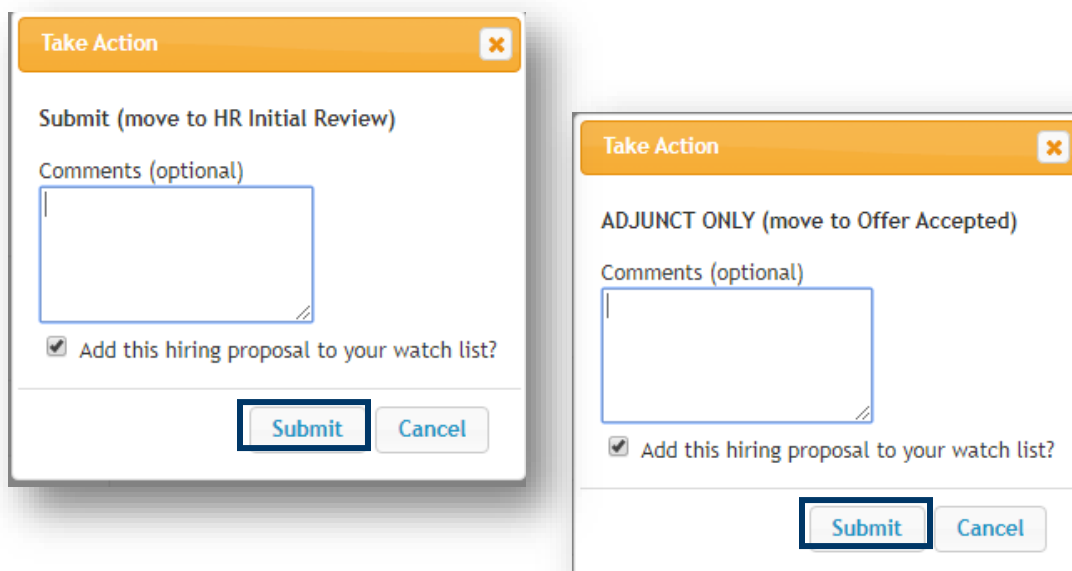
Once the hiring proposal is complete, navigate to the **Take Action On Position Request** button in the upper right corner of the screen and select:

- **Faculty & Staff: Submit (move to HR Initial Review)**. This moves the position request to the HR for review.
- **Adjunct: ADJUNCT ONLY (move to Offer Accepted)**.



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

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.

End of Section

Reviewing Hiring Proposals

Use this section of the guide when a departmental user has created the hiring proposal.

If the hiring proposal was created by the department chair/director role, this section can be skipped.

Hiring proposals that have been forwarded to the Department Head/Director 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.

Inbox

Postings 9

Users 30

Hiring Proposals 20

Position Requests 32

Onboarding Tasks

Special Handling Lists

SEARCH

Filters

TITLE	APPLICANT NAME	CURRENT STATUS	DAYS IN CURRENT STATUS
-------	----------------	----------------	------------------------

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

TITLE	APPLICANT NAME	CURRENT STATUS	DAYS IN CURRENT STATUS
Administrative Program Specialist Registrar's Office		Dept Head/Director	21

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

Staff / ... / Hootie Owl (Recommend for Hire) / PD Hiring Proposal / Summary

PD Hiring Proposal: Hootie Owl (Staff)

Edit

Current Status: Dept Head/Director

Position Type: Staff

Department: College of Health,
Arts & Sciences (HAS)

Applicant: Hootie Owl

Posting: Office Specialist 2

Created by: Hootie Owl

Owner: Dept Head/Director

Summary

History

Settings

Reports

✓ Hiring Proposal

Edit

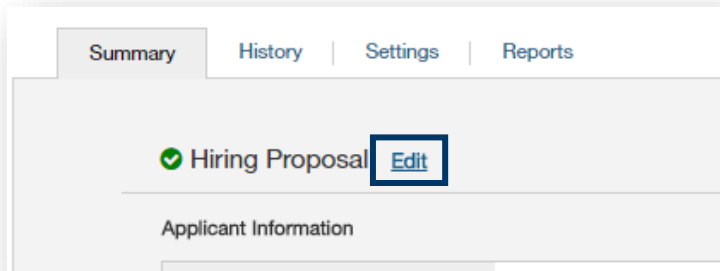
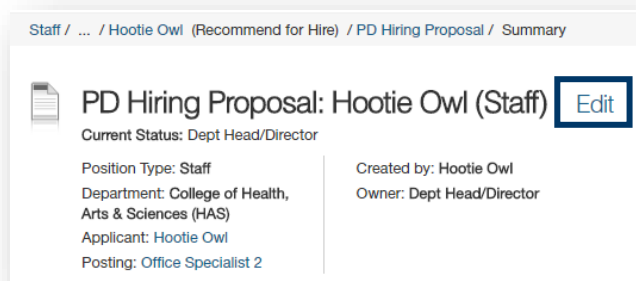
Applicant Information

First Name	Hootie
Middle Name	T.
Last Name	Owl
Address1	123 Hustlin' Owls Drive

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.

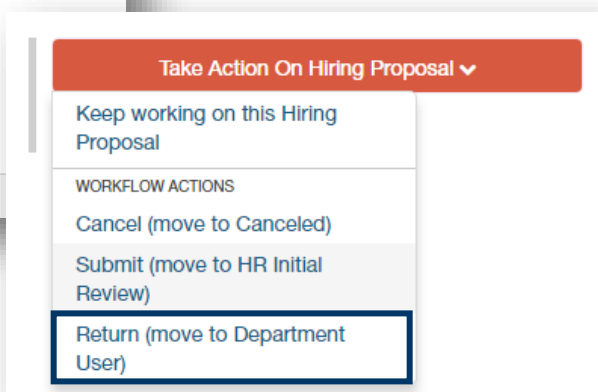
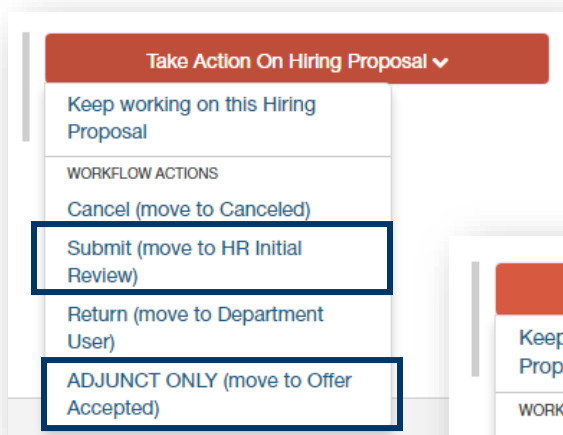
If you would like to review section by section, click the **Edit** button next to the position title at the top of the screen OR you can open a specific section by clicking the **Edit** button next to the section title.



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.

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

- **Faculty & Staff:** Submit (move to HR Initial Review). This moves the position request to the HR for review.
- **Adjunct:** ADJUNCT ONLY (move to Offer Accepted).



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.

A screenshot of a 'Take Action' dialog box. The title bar is orange with a close button. The main content area is white. It has a title 'Submit (move to HR Initial Review)' in bold. Below it is a label 'Comments (optional)' followed by a text input field. At the bottom, there is a checkbox labeled 'Add this hiring proposal to your watch list?' which is checked. Below the checkbox are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a blue border.

A screenshot of a 'Take Action' dialog box. The title bar is orange with a close button. The main content area is white. It has a title 'ADJUNCT ONLY (move to Offer Accepted)' in bold. Below it is a label 'Comments (optional)' followed by a text input field. At the bottom, there is a checkbox labeled 'Add this hiring proposal to your watch list?' which is checked. Below the checkbox are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a blue border.

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 (oitthr@oit.edu or 541.885.1120).

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

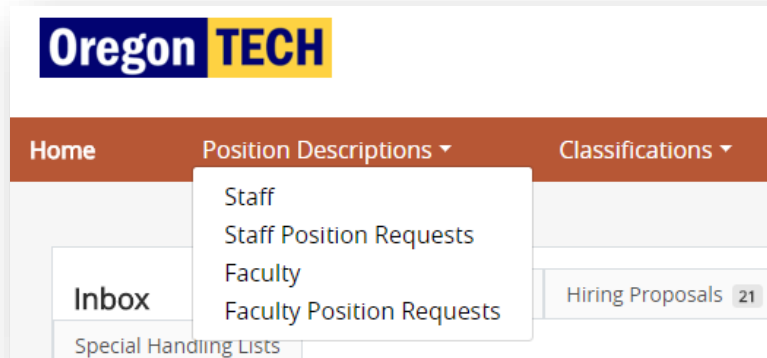
If you returned the item to a user earlier in the queue for changes, they will return the item to your queue once complete. HEROES will send you a notification once the item is submitted. Return to the top of this section for guidance on accessing the returned item.

End of Section

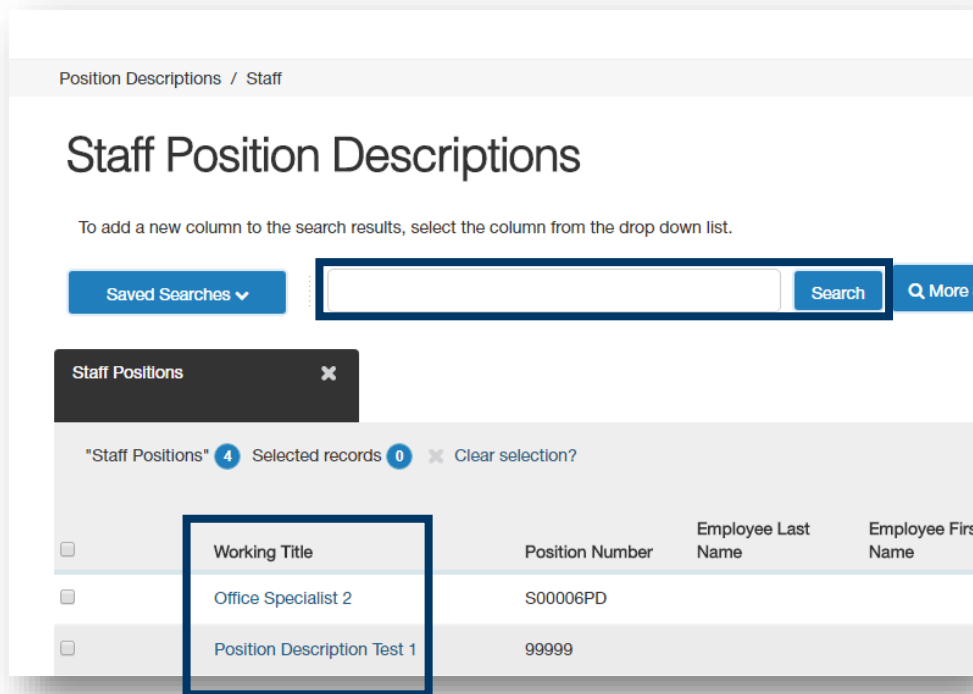
Appendix I: Modifying a Current Position Description

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

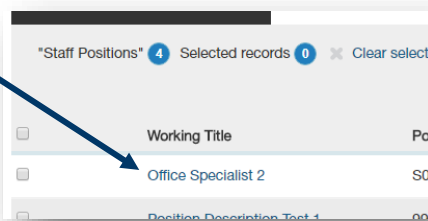
Click on **Position Descriptions** and select **Staff** or **Faculty**, whichever is the position type for the position you need to modify.



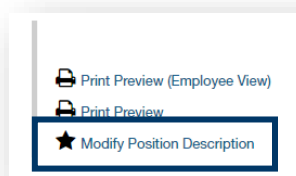
Find the position request by using the **Search** function or by scrolling through the list.



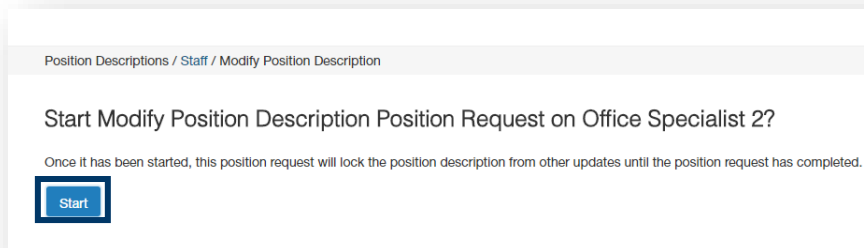
Click on the **Working Title** link to open the position description.



In the upper right corner, click on the ★ **Modify Position Description** button.



Then click on the **Start** button in the next screen.



The position title in the next screen will depend on the position description being modified.

Complete the **Position Justification**, including the **Reason for Position Modification** and **Justification of Need**.

If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

Return to the [Creating a New Position Description](#) section for guidance on completing the rest of the modification. The primary difference between the Create and the Modify is addressed above.

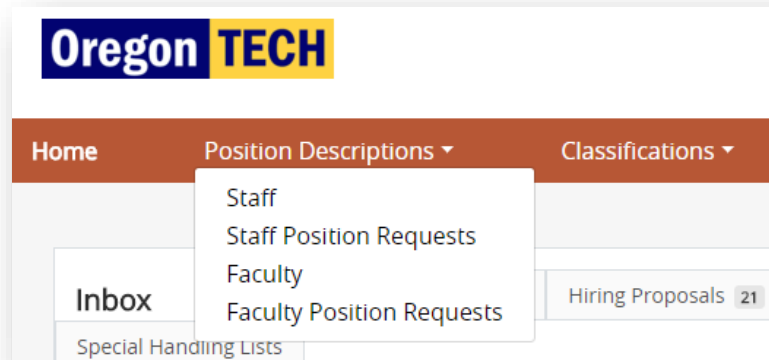
End of Section

Appendix II: Finding a Lost or Paused Position Request

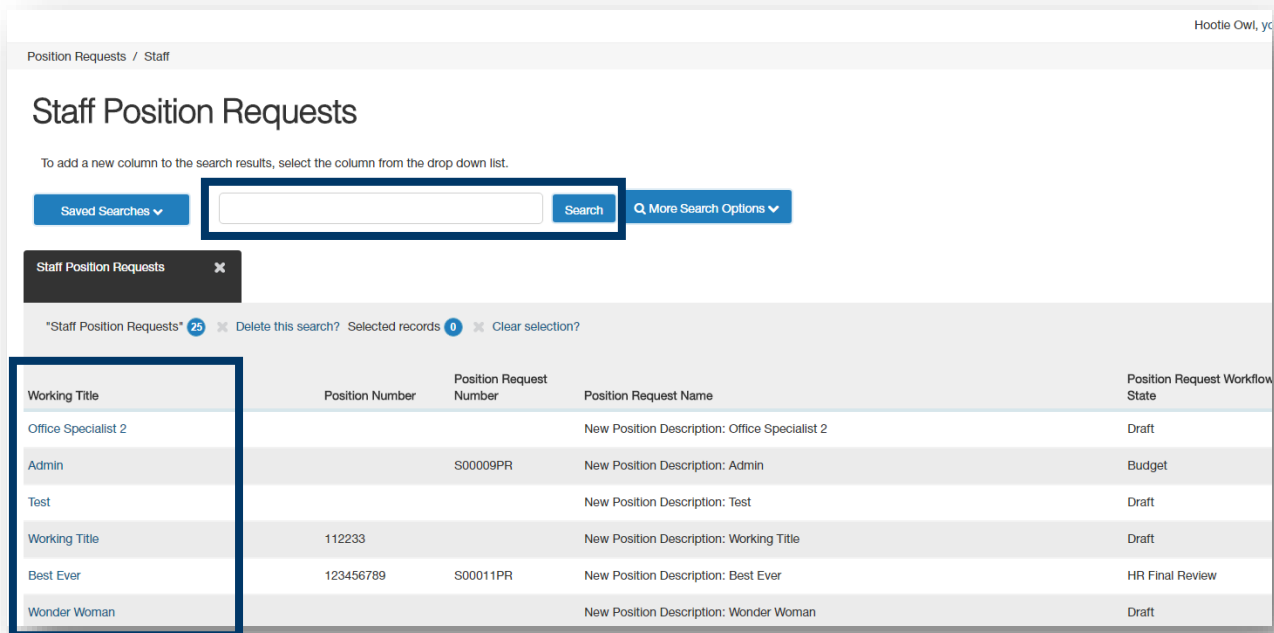
This section is to help you find a position request that you have accidentally navigated away from or to find a position request you needed to stop working on for a time.

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

Click on **Position Descriptions** and select **Staff Position Request** or **Faculty Position Request**, whichever position type for which you started a position description.

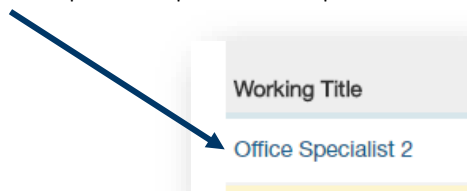


Find the position request by using the **Search** function or by scrolling through the list.

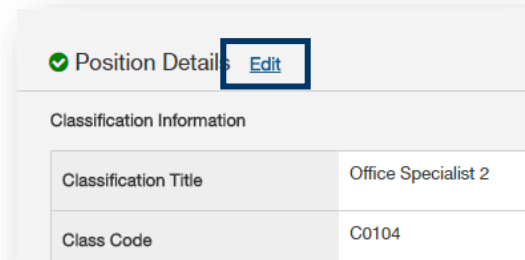
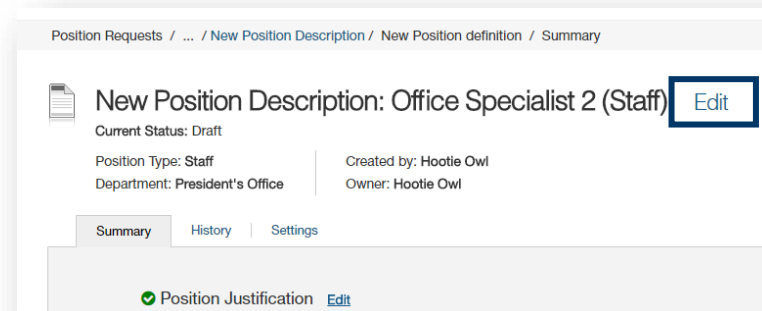


Before selecting the position, make sure to check the position request's **status** in the **Position Request Workflow State**. If the status is anything other than Draft or your queue, you may not be able to take action on the position request.

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



Clicking on the link will open the summary page of the position request. To continue editing, click the **Edit** button next to the position 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.



If the position request is ready to be submitted, follow the instructions in the [position request Summary section](#).

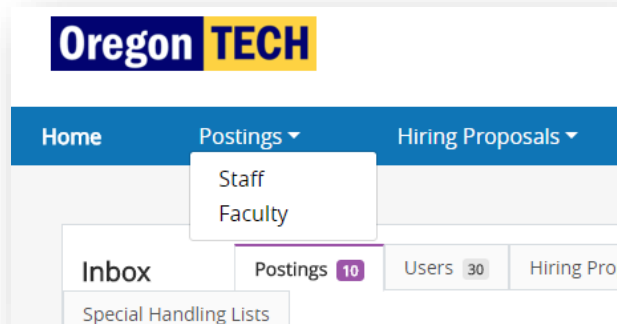
End of Section

Appendix III: How to Find a Lost or Paused Posting

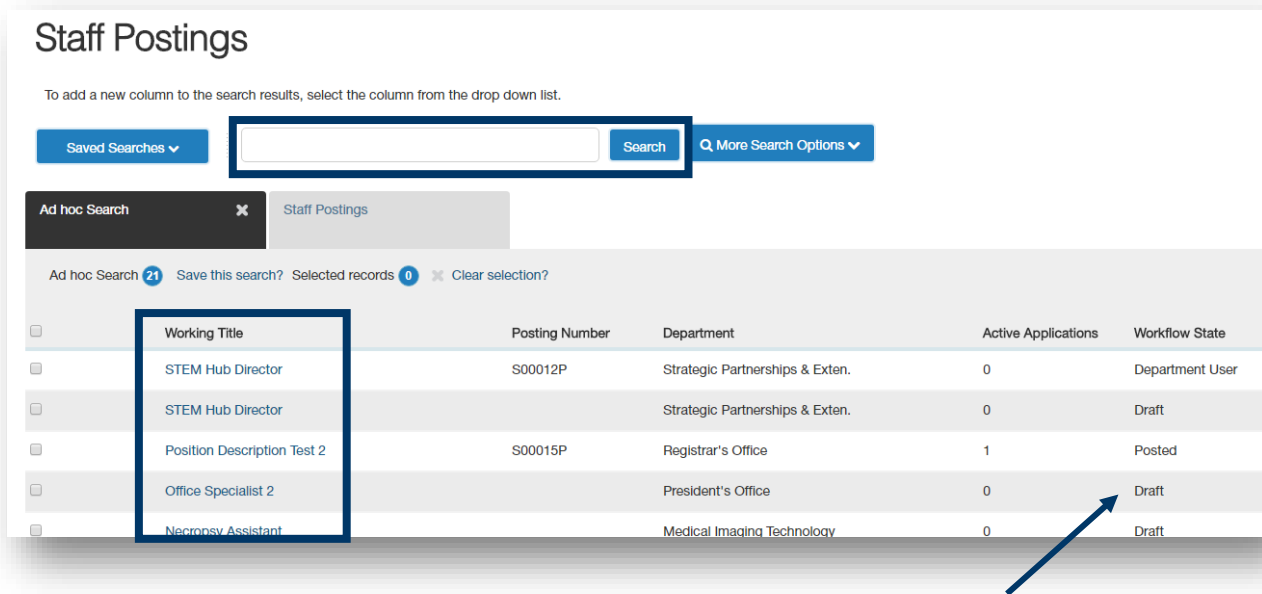
This section is to help you find a posting that you have accidentally navigated away from or to find a posting you needed to stop working on for a time.

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

Click on **Postings** and select **Staff** or **Faculty**, whichever position type for which you started a posting.

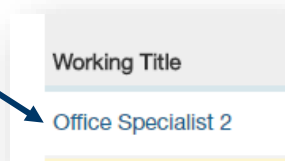


You can find the posting by using the **Search** function or by scrolling through the list.

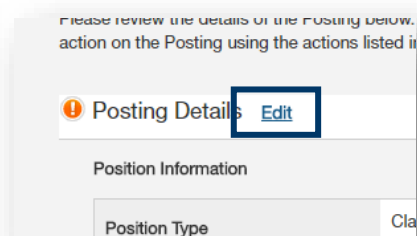
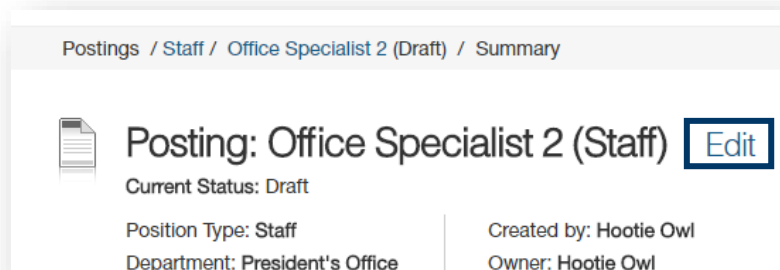


Before selecting the item, make sure to check the posting's **status** in the **Workflow State** column. If the status is anything other than Draft or your queue, you may not be able to take action on the posting.

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



Clicking on the link will open the summary page of the posting. To continue editing, click the **Edit** button next to the position 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.



If the posting is ready to be submitted, follow the instructions in the [posting Summary section](#).

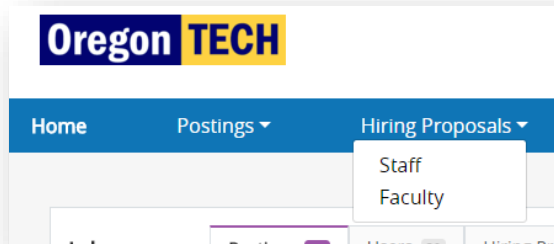
End of Section

Appendix IV: 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**, whichever position type for which you started a hiring proposal.



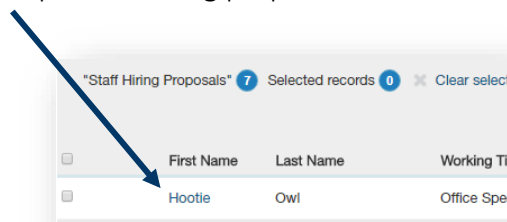
You can find the hiring proposal by using the **Search** function or by scrolling through the list.

A screenshot of the 'Staff Hiring Proposals' search results page. The page has a header with the title 'Staff Hiring Proposals' and a sub-header 'To add a new column to the search results, select the column from the drop down list.' Below this is a search bar with a 'Search' button and a 'More Search Options' dropdown. The main content area shows a table of hiring proposals. The table has columns for 'First Name', 'Last Name', 'Working Title', 'Hiring Proposal Number', 'Department', 'Hiring Proposal Workflow State', and 'Last S'. The first three rows of the table are highlighted in light blue. The first row shows 'Hootie Owl' with 'Office Specialist 2' as the working title. The second row shows 'Hootie Owl' with 'Position Description Test 2' as the working title. The third row shows 'Hootie Owl' with 'Administrative Program Specialist' as the working title. The fourth row shows 'Sample 1' with 'Human Resources 1' as the working title. The 'Hiring Proposal Workflow State' column shows 'Provost', 'Canceled', 'Draft', and 'Department User' respectively. The 'Last S' column shows 'September' for all rows.

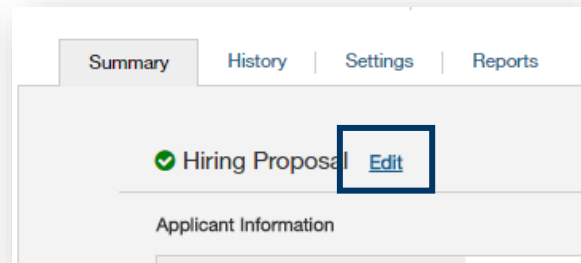
	First Name	Last Name	Working Title	Hiring Proposal Number	Department	Hiring Proposal Workflow State	Last S
<input type="checkbox"/>	Hootie	Owl	Office Specialist 2	S00012HP	College of Health, Arts & Sciences (HAS)	Provost	September
<input type="checkbox"/>	Hootie	Owl	Position Description Test 2	S00010HP	Registrar's Office	Canceled	September
<input type="checkbox"/>	Hootie	Owl	Administrative Program Specialist		Business Affairs	Draft	September
<input type="checkbox"/>	Sample 1	Human Resources 1	Office Specialist 2	S00011HP	General Instruction	Department User	September

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. To continue editing, click the **Edit** button next to the position 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.



If the hiring proposal is ready to be submitted, follow the instructions in the [position request Summary section](#).

End of Section

Appendix V: 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
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