



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

*Position Descriptions, Postings, and Hiring Proposals*

## Provost User Guide

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## Introduction

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

### Tasks Available in HEROES\*:

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

\*dependent upon assigned role and department

### Best Web Browsers to Use

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

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

### Security of Information / Applicant Data

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

### System Questions

User guides and quick reference documents related to HEREOS are located on the [Human Resources Systems](#) page.

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

541.885.1120  
[oithr@oit.edu](mailto: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 HEROES menu item.

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

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

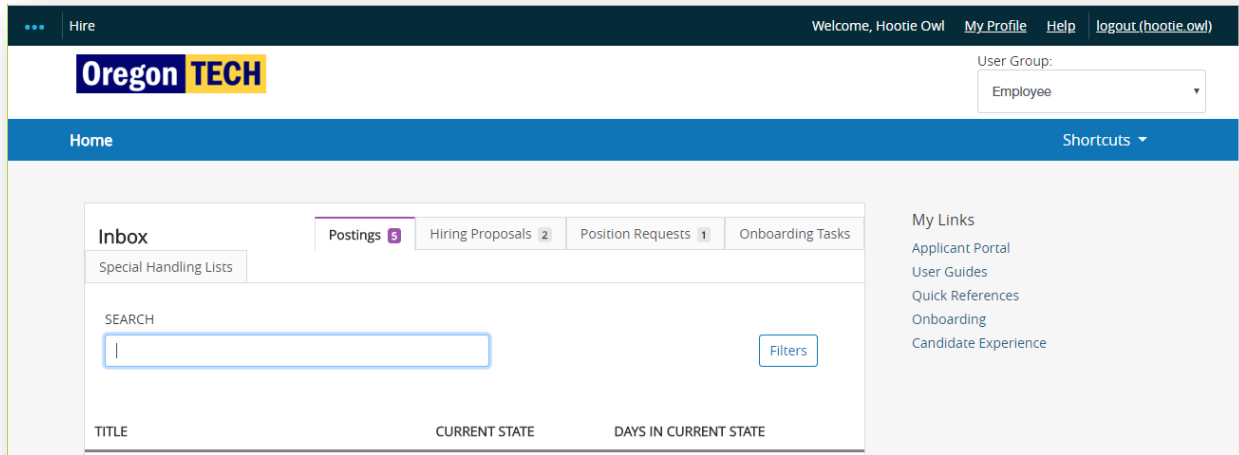
If you experience any issues with the login, please call 541.885.1120.

# HEROES Navigation Essentials & System Terminology

*Key system terms are bolded.*

## The Home Page

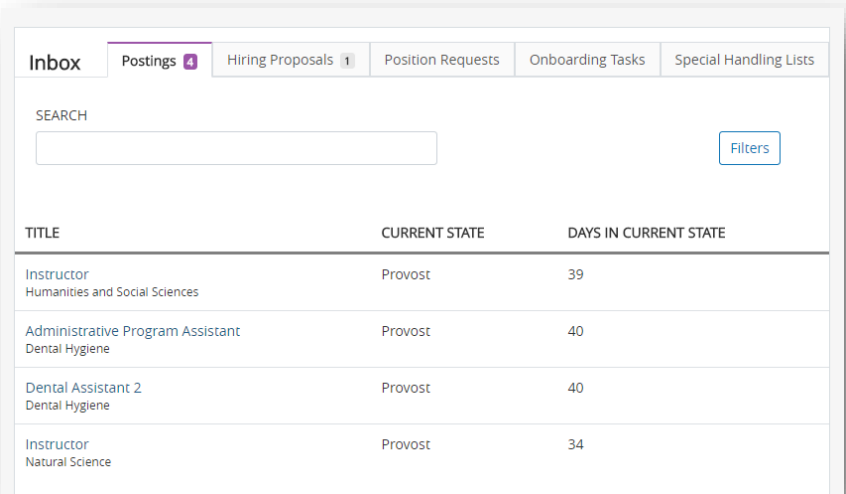
This is the page you see when you log in.



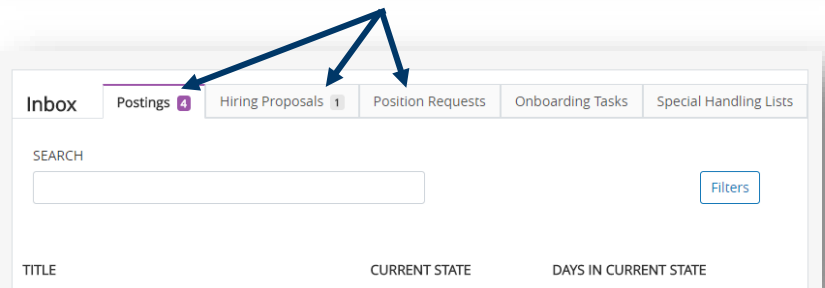
It presents a dashboard that provides access to:

## Summary views of your Inbox and Watch List.

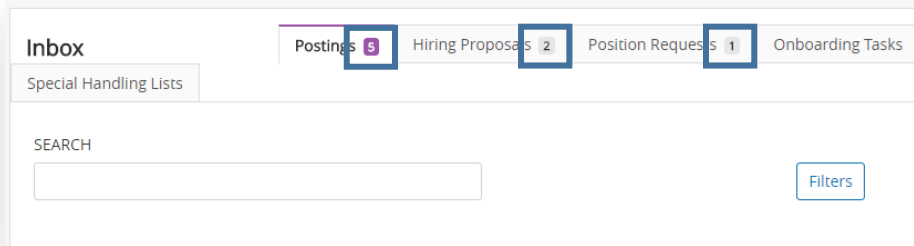
The **Inbox** presents within the system that are in your queue. These tasks include all items that you are authorized to act on.



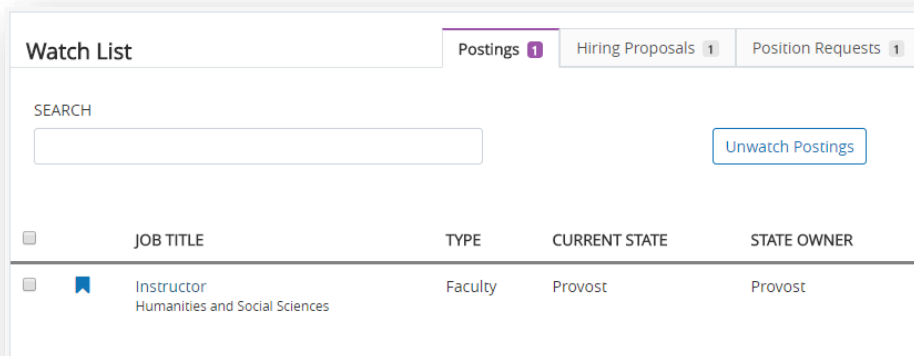
- Navigate between the three main Inbox tabs by clicking on the tab names.



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

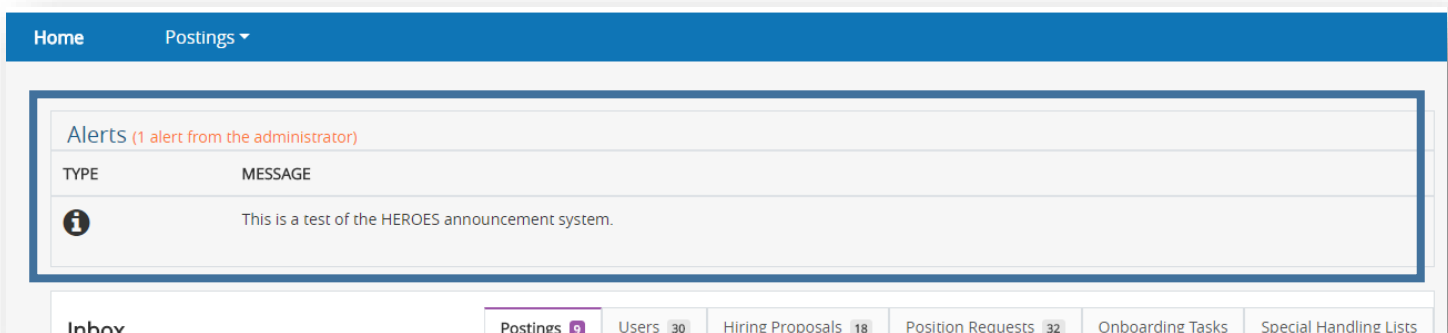


- The **Watch List** allows you to follow the progress of items for your department. The Watch List shows you where items are in the workflow. Items are automatically removed from your Watch List when they are completed or canceled



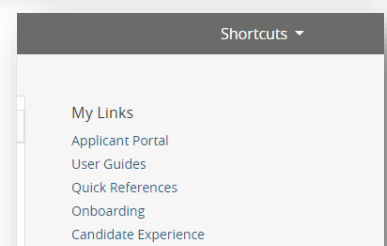
## Alerts and Other Announcements

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



## My Links

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



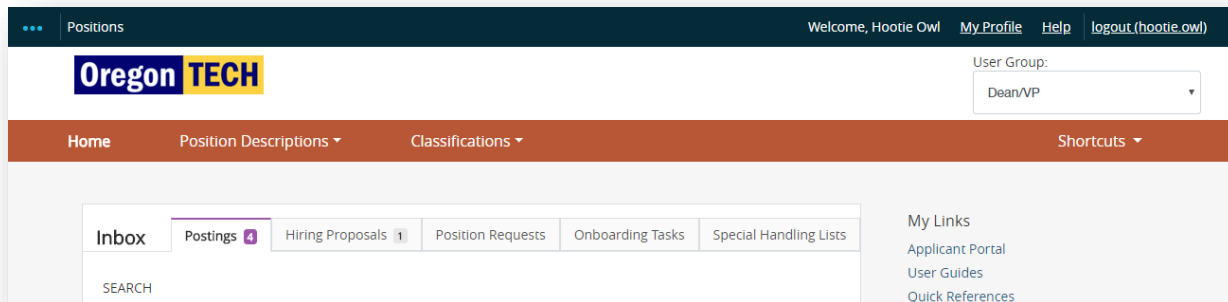
## Modules

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

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

### *Positions Module (Orange banner)*

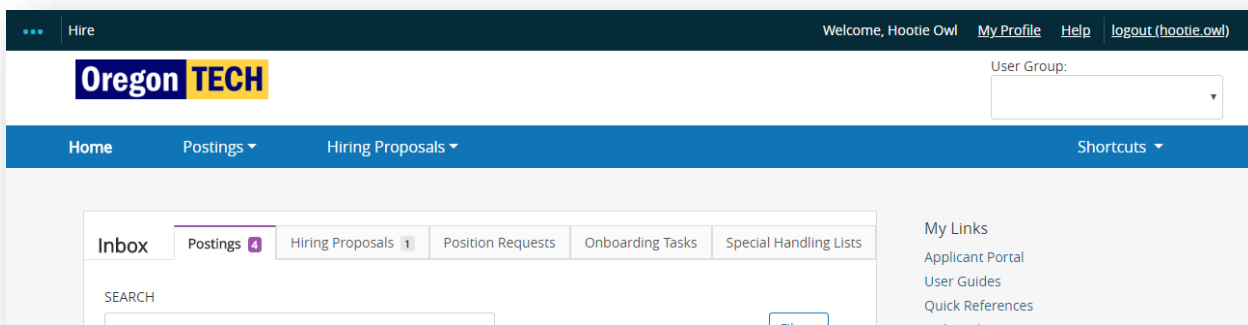
The **Positions module** gives the Department User or Department Head/Director role access to create new position descriptions and to view and/or modify existing position descriptions.



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

### *Hire Module (Blue banner)*

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

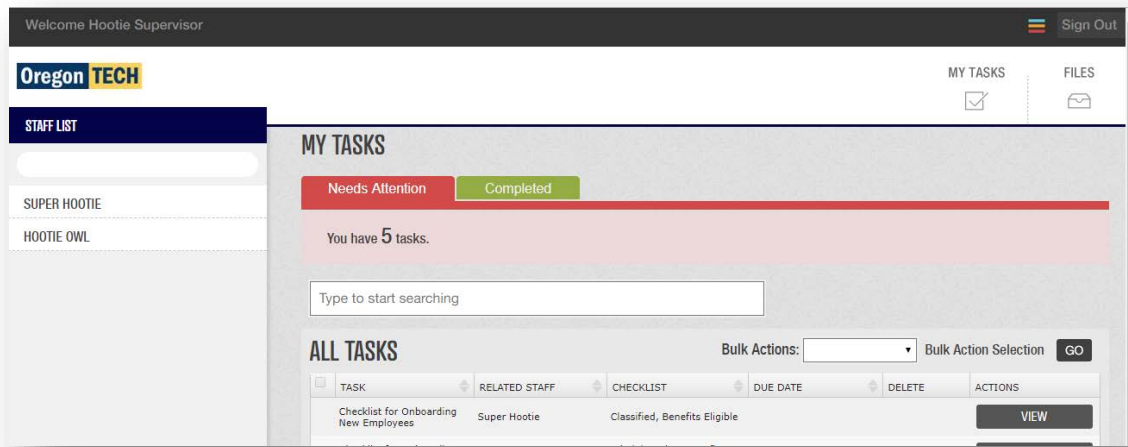


- **Postings** are announcements of job vacancies / job openings. Applicants apply to postings and HEROES gathers applications into one central location in the Hire module.
  - Postings are typically created from a position description once the position description has been finalized and approved.

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

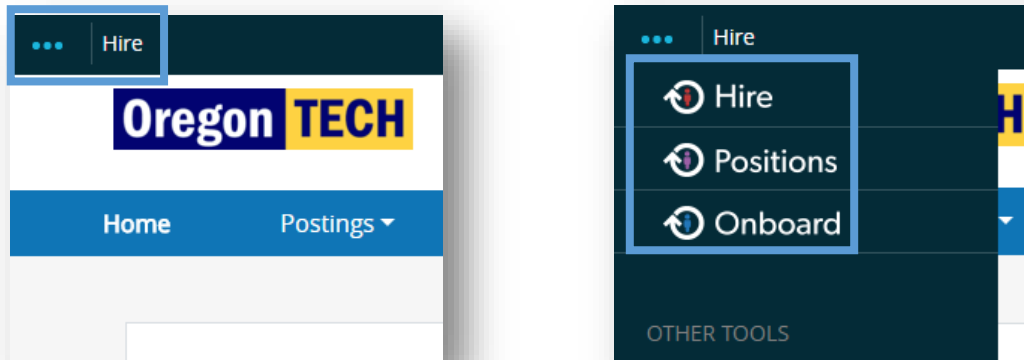
## Onboard Module

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



## Switching Between Modules

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



## Roles

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

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

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



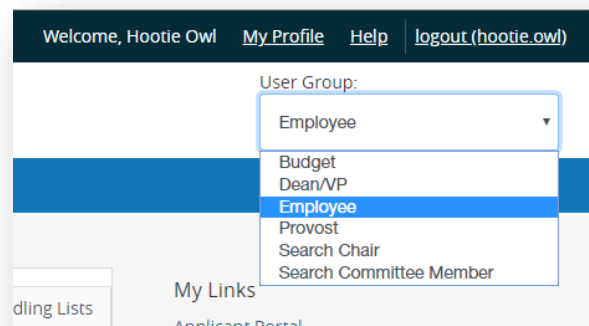
## Role Definitions

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

## Switching Between Roles

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

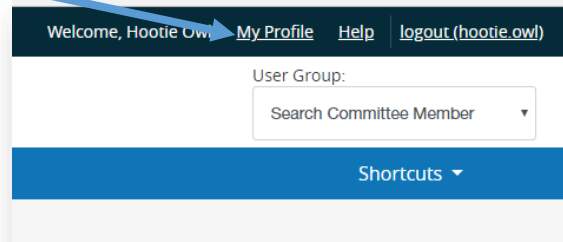
Your role list may be different than Hootie's in the screen shot above based on role(s) assigned to your position and your department(s).



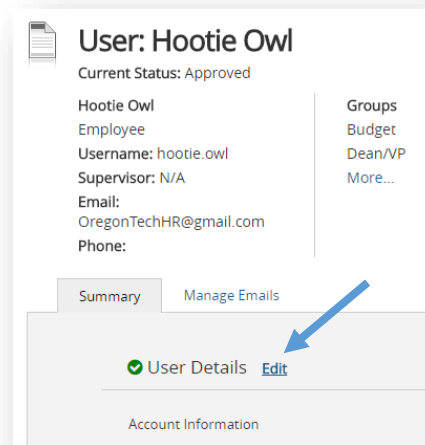
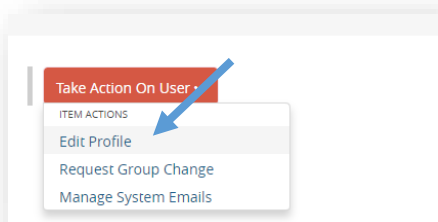
## Setting Your Preferred Role and Module at Login

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

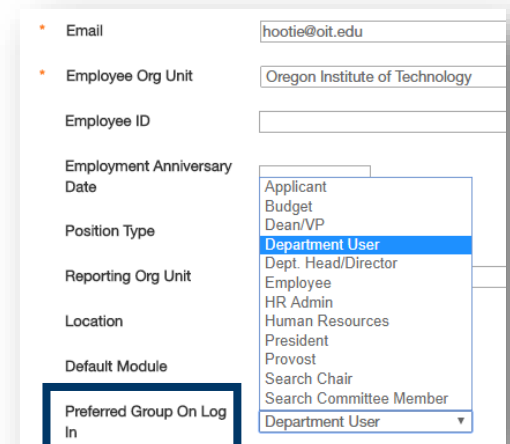
- Click on **My Profile** from the menu bar at the top of the screen.



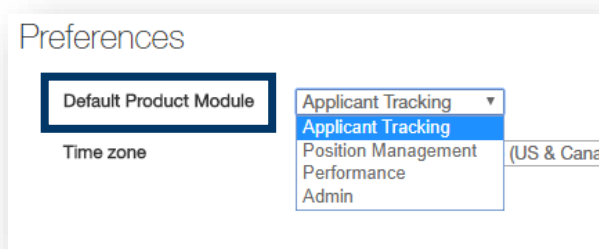
- Navigate to the **Take Action On User** button near the upper right corner and select **Edit Profile** OR click on **Edit** next to **User Details** in the tabbed section below the user information.



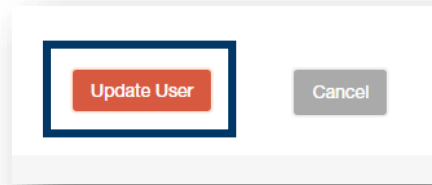
- Under Account Information, find **Preferred Group On Log In** and click on the dropdown to select the role you want to be logged into upon signing in.
- Depending on your assigned role(s), your list may be different than Hootie's is in the screen shot below.



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

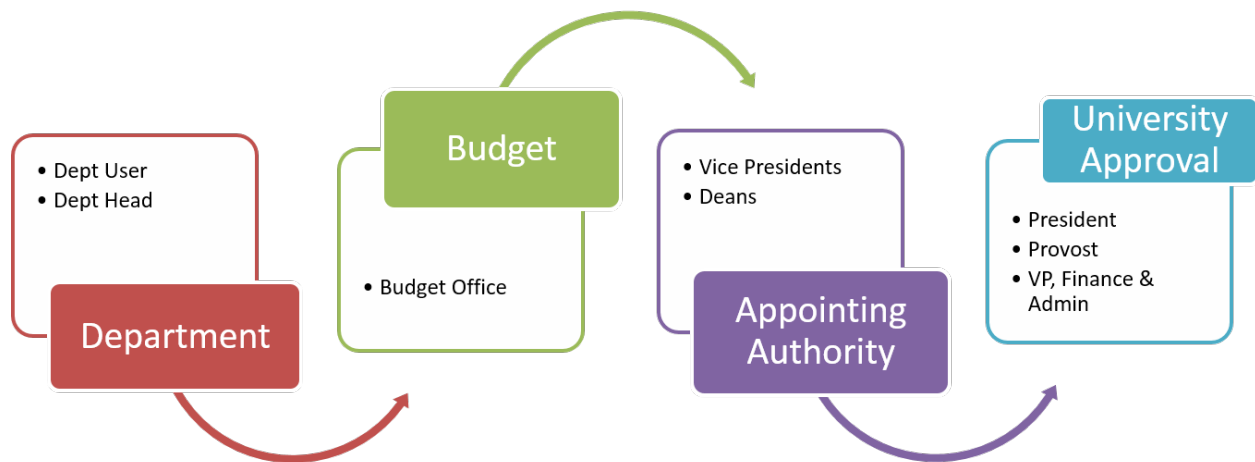


- Click on **Update User** button on the right side of the screen (top and bottom of the page) to save the changes.



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



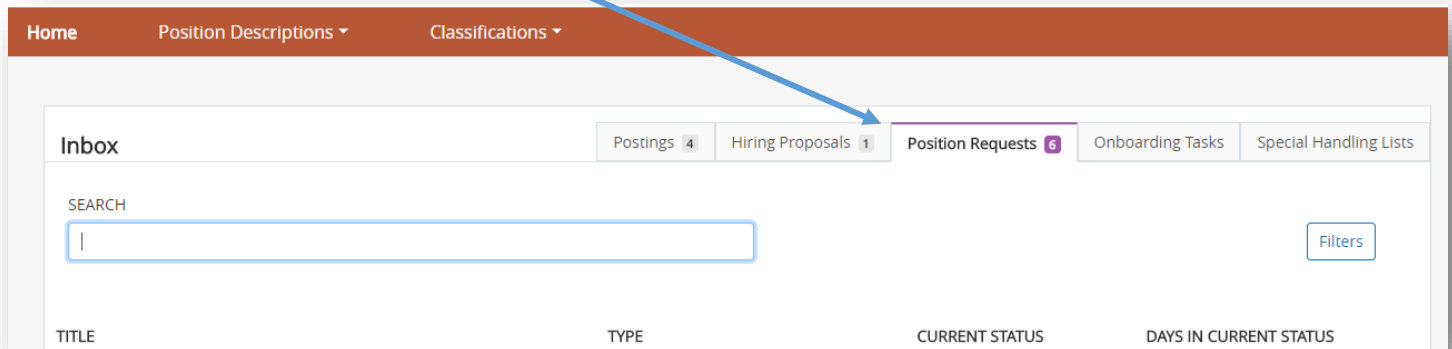
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End of Section

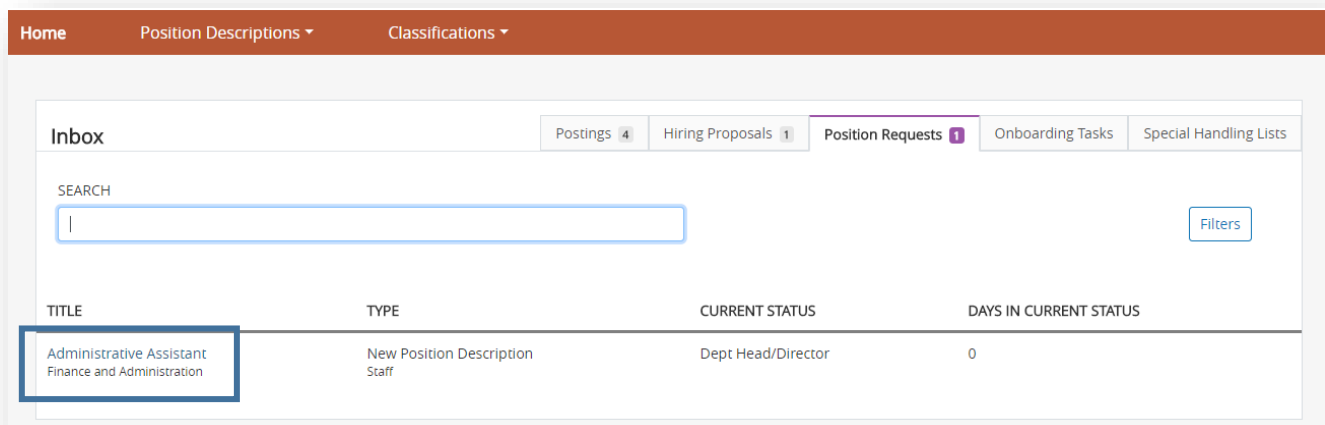
# Reviewing Position Requests

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

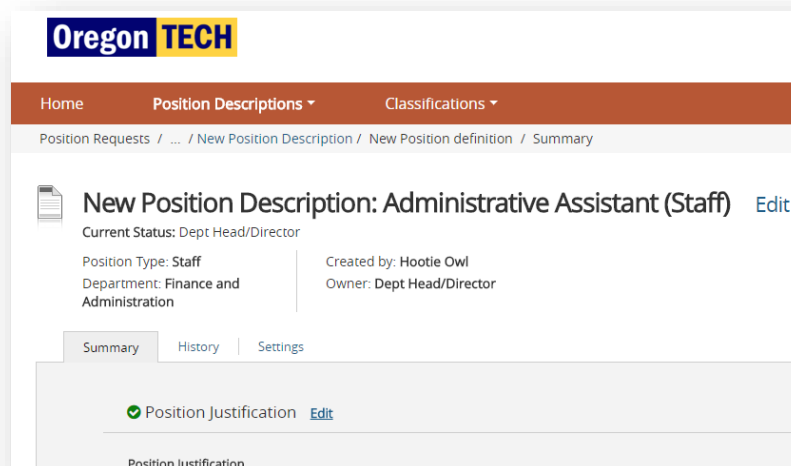
In your inbox, click on the **Position Requests** tab.



And then click on the **Title**.



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



There are a couple options for reviewing.

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

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

The left screenshot shows the 'New Position Description: Office Specialist 2 (Staff)' page. It includes a document icon, the title, and an 'Edit' button. Below the title, it shows 'Current Status: Draft', 'Position Type: Staff', 'Department: President's Office', 'Created by: Hootie Owl', and 'Owner: Hootie Owl'. At the bottom are tabs for 'Summary', 'History', and 'Settings'.

The right screenshot shows the 'Position Details' section with a green checkmark and an 'Edit' button. Below it is a table for 'Classification Information':

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 the **College/Divisions Comments** field with any information that may be helpful for the department roles, as needed.

The screenshot shows a text input field labeled 'College/Division Comments' with a blue border and a small icon in the bottom right corner.

Once the review is complete, navigate to the **Take Action On Position Request** button in the upper right corner of the screen and select **Submit (move to HR Final Review)**.

As needed, you can also return the posting to the Dean/VP by selecting **Return (move to Dean/VP)**. Follow up with the Dean/VP as to why you are returning it to them (e.g. changes, additions, removals).

The left screenshot shows the 'Take Action On Position Request' dropdown menu with the following options: 'Keep working on this Position Request', 'WORKFLOW ACTIONS', 'Approve (move to HR Final Review)', and 'Return (move to Dean/VP)'. The 'Approve' option is highlighted with a blue box.

The right screenshot shows the same dropdown menu, but the 'Return (move to Dean/VP)' option is highlighted with a blue box.

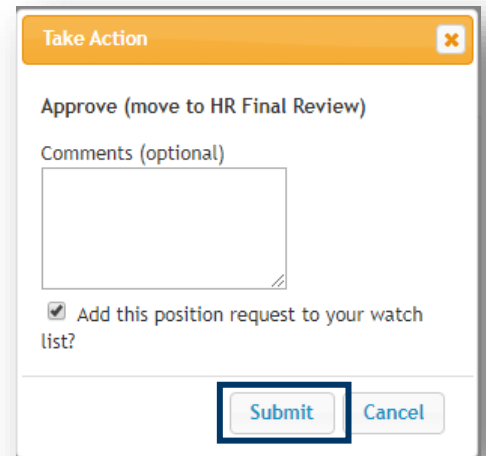
Once you select the Submit button, a window will pop up that is titled Take Action. This window gives you the option to enter comments and add the position request to your watch list. If you do not want to add it to your watch list, make sure to uncheck the check box.

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

Once 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](mailto: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.



Take Action

Approve (move to HR Final Review)

Comments (optional)

☒ Add this position request to your watch list?

Submit Cancel

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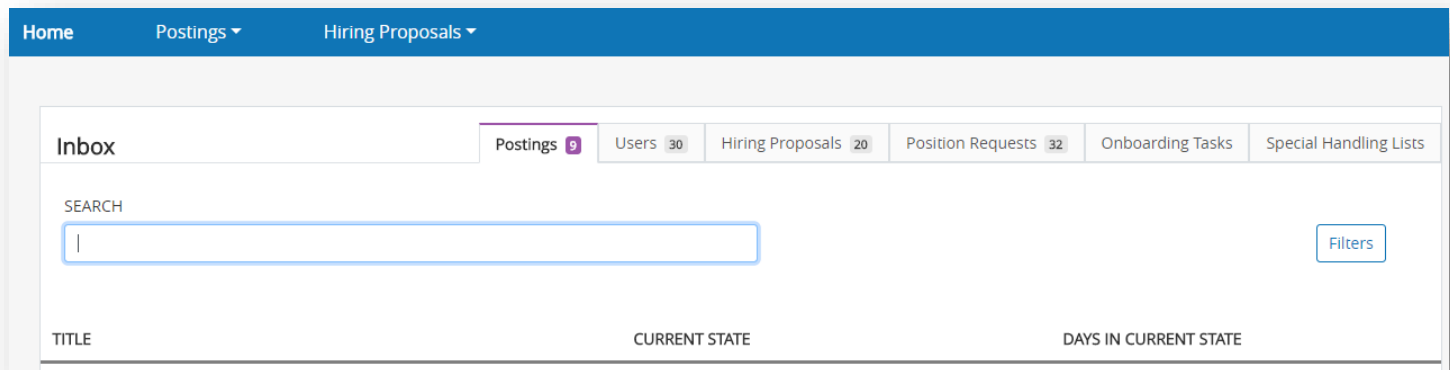
End of Section

# Reviewing Postings

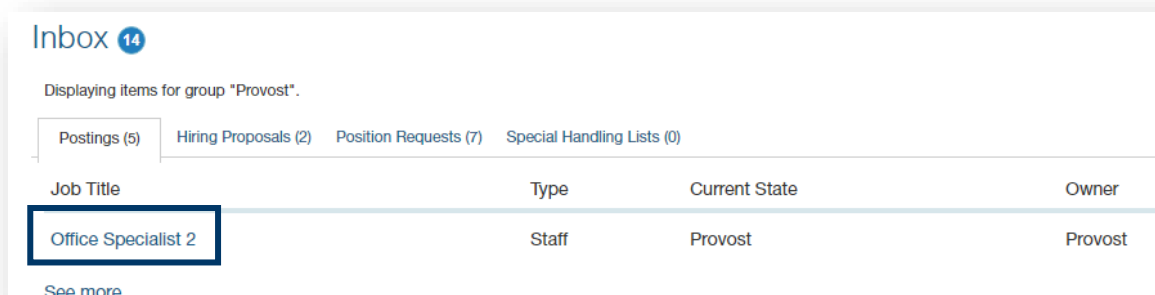


Postings that have been forwarded to the Provost queue can be quickly accessed from the home page.

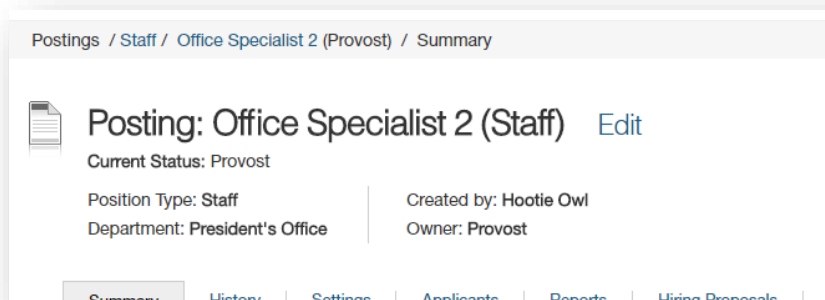
In your inbox, the **Posting** tab opens by default. If it doesn't, click on the **Posting** tab to access postings that are in your queue.



And then click on the **Title**.



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



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

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.

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

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

Current Status: Provost

Position Type: Staff	Created by: Hootie Owl
Department: President's Office	Owner: Provost

✓ Posting Details
[Edit](#)

Position Information

Position Type	Classified
Working Title	Office Specialist 2

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

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

As needed, you can also return the item to the Dean/VP by selecting **Return (move to Dean/VP)**. Follow up with the Dean/VP user as to why you are returning it (e.g. changes, additions, removals).

Take Action On Posting ▼
Keep working on this Posting

WORKFLOW ACTIONS

Approve (move to HR Final Review)
Return (move to Dean/VP)

Take Action On Posting ▼
Keep working on this Posting

WORKFLOW ACTIONS

Approve (move to HR Final Review)
Return (move to Dean/VP)

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.

Once 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 ([oit@oit.edu](mailto:oit@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.

Take Action

Approve (move to HR Final Review)

Comments (optional)

☒ This posting is currently in your watch list. Uncheck this box to remove it.

Submit

Cancel

End of Section

# Reviewing Hiring Proposals

Hiring proposals that have been forwarded to the Provost 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
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Click on the **Job Title** to open the hiring proposal.

TITLE	APPLICANT NAME	CURRENT STATUS	DAYS IN CURRENT STATUS
<a href="#">Administrative Program Specialist Registrar's Office</a>		Dept Head/Director	21

Clicking on the job title 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: Provost

Position Type: Staff

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

Applicant: Hootie Owl

Posting: Office Specialist 2

Created by: Hootie Owl

Owner: Provost

Summary

History

Settings

Reports

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.

PD Hiring Proposal: Hootie Owl (Staff)

Edit

Current Status: Provost

Position Type: Staff

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

Applicant: Hootie Owl

Posting: Office Specialist 2

Created by: Hootie Owl

Owner: Provost

Summary

History

Settings

Reports

✓ Hiring Proposal

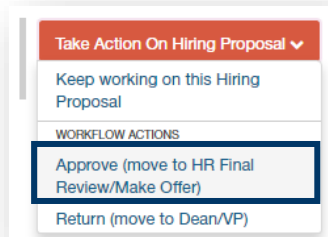
Edit

Applicant Information

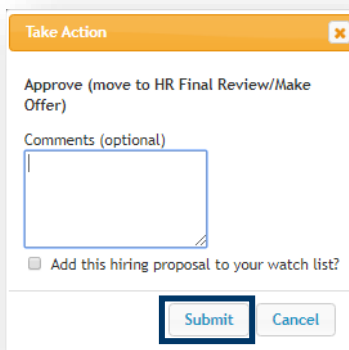
If you opt to review the position request via the Summary and you find that a section needs to be edited, follow the steps above to edit the section.

Once the review is complete, navigate to the **Take Action On Hiring Proposal** button in the upper right corner of the screen and select **Approve (move to HR Final Review/Make Offer)**. This moves the hiring proposal to or HR for a final review.

As needed, you can also return the hiring proposal to the Department User by selecting **Return (move to Dean/VP)**.



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](mailto:oithr@oit.edu) or 541.885.1120).

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

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

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End of Section

## Appendix I: Finding a Lost or Paused Position Request

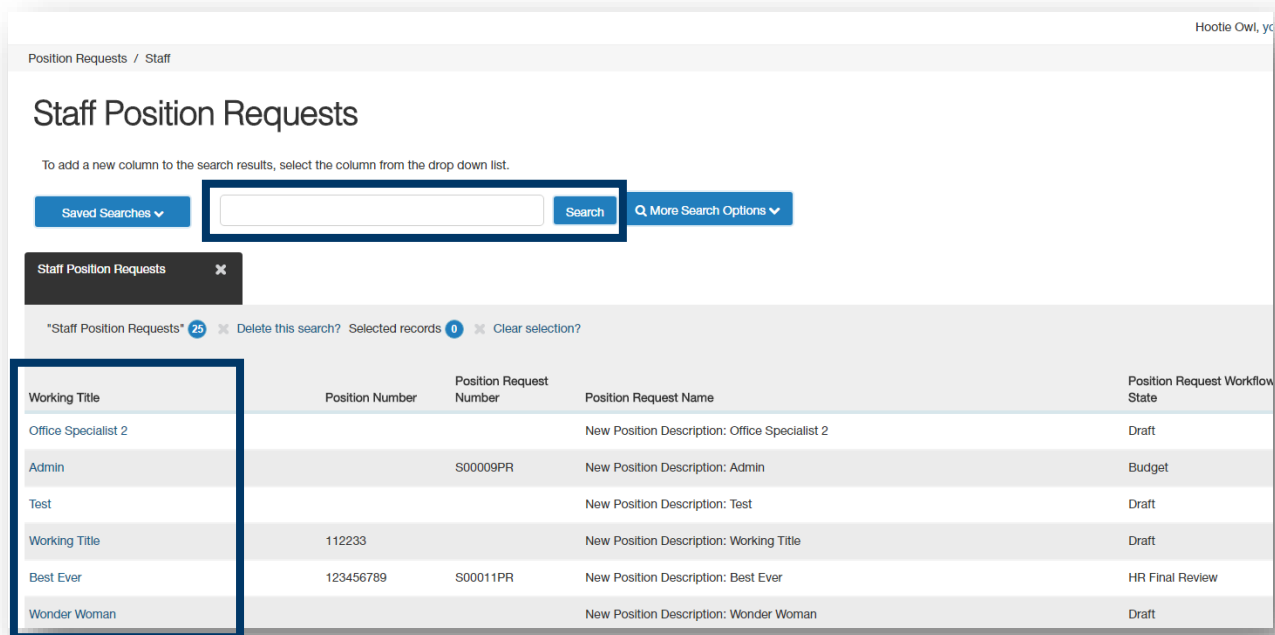
This section is to help you find a position request that you have accidentally navigated away from or to find a position request you needed to stop working on for a time.

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

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

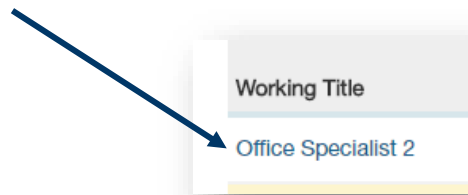


Find the position request by using the **Search** function or by scrolling through the list.

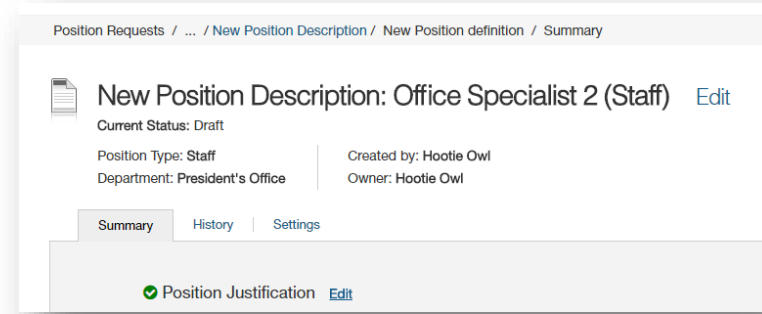


Before selecting the position, make sure to check the position request's **status** in the **Position Request Workflow State**. If the status is anything other than your queue, you may not be able to take action on the position request.

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



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



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

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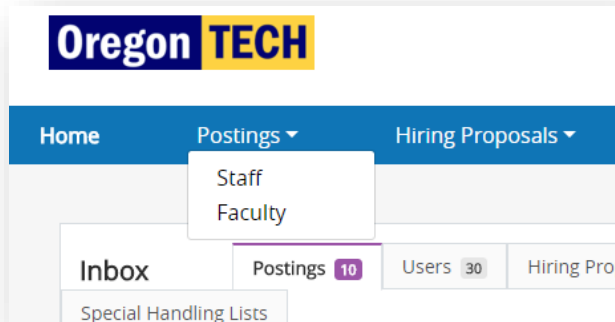
End of Section

## Appendix II: How to Find a Lost or Paused Posting

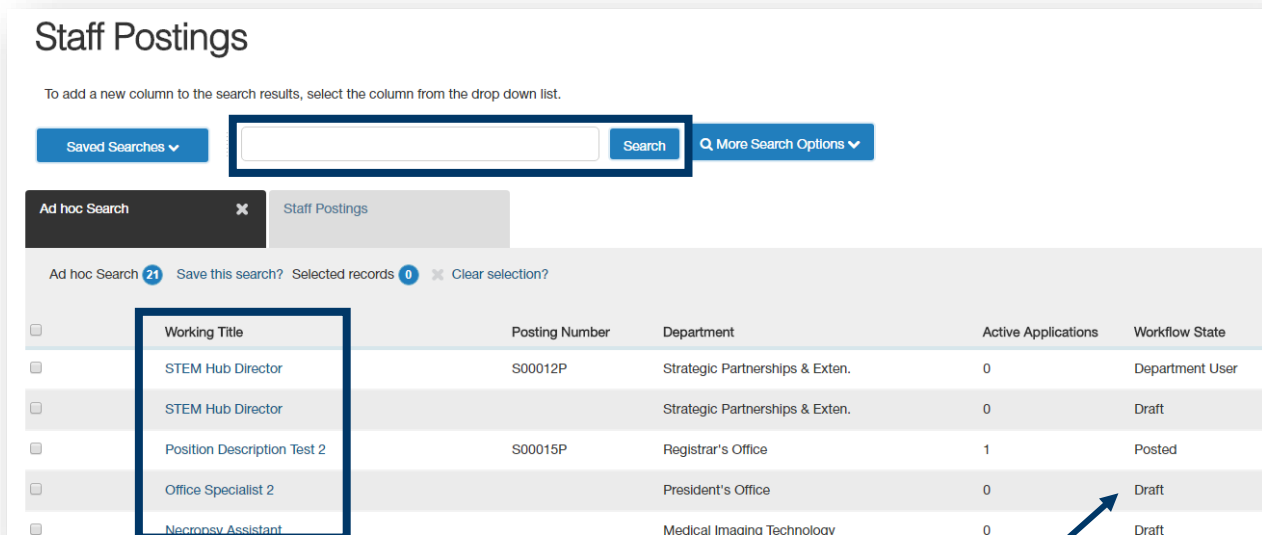
This section is to help you find a posting that you have accidentally navigated away from or to find a posting you needed to stop working on for a time.

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

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

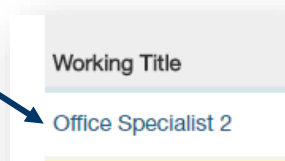


You can find the posting by using the **Search** function or by scrolling through the list.



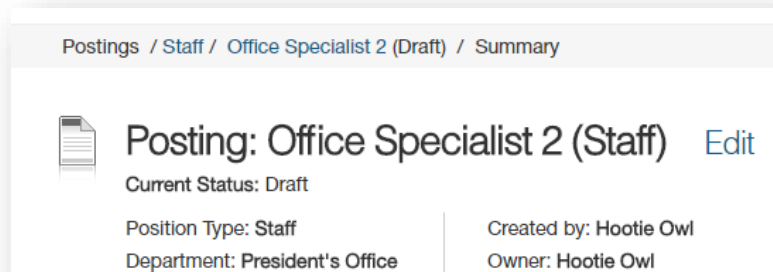
Before selecting the item, make sure to check the posting's **status** in the **Workflow State** column. If the status is anything other than your queue, you may not be able to take action on the posting.

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





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



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

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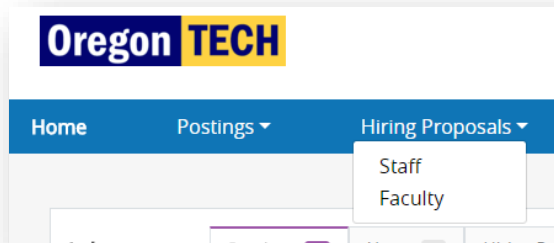
End of Section

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

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

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

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



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

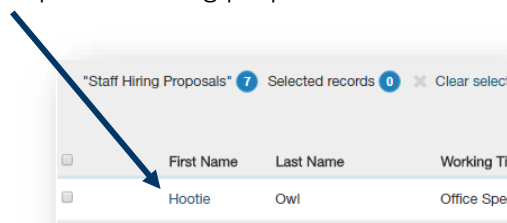
### Staff Hiring Proposals

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

Staff Hiring Proposals							
"Staff Hiring Proposals" 7 Selected records 0 Clear selection?							
<input type="checkbox"/>	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	Septer
<input type="checkbox"/>	Hootie	Owl	Position Description Test 2	S00010HP	Registrar's Office	Canceled	Septer
<input type="checkbox"/>	Hootie	Owl	Administrative Program Specialist		Business Affairs	Draft	Septer
<input type="checkbox"/>	Sample 1	Human Resources 1	Office Specialist 2	S00011HP	General Instruction	Department User	Septer

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.



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

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

Current Status: Draft

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

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

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End of Section

## Appendix IV: Contact & Support Information

Harmony Stobaugh HR Consultant Snell Hall 110 541.885.1278 <a href="mailto:harmony.stobaugh@oit.edu">harmony.stobaugh@oit.edu</a>	Sandi Hanan Senior HR Consultant Snell 111 541.885.1074 <a href="mailto:sandi.hanan@oit.edu">sandi.hanan@oit.edu</a>
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