

Oregon **TECH** Human Resources

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

Recruitments

Search Chair Guide

[Quicklink: Accessing Applicant Materials](#)

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Introduction

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

Tasks Available in HEROES*:

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

*dependent upon assigned role and department

Best Web Browsers to Use

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

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

Security of Information / Applicant Data

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

System Questions

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

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

541.885.1120
oithr@oit.edu

User Expectations

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

Users shall not provide or release this information to any individual or organization except for the sole purpose of conducting university business within the requirements of their position. Users understand that they will use this system in accordance with university policies and understand that any misuse or inappropriate disclosure of such information could result in 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 view of Watch List
- Alerts and Other Announcements
- My Links

Summary view of your Watch List.

- The **Watch List** allows you to follow the progress of items. 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.

JOB TITLE	TYPE	CURRENT STATE	STATE OWNER
Associate Provost for Research and Academic Affairs Office of the Provost	Staff	Posted	Human Resources
Accountant 1 (Grant & Fixed Asset Accountant) Business Affairs	Staff	Closed/Removed from Web	Human Resources
Academic Specialist Student Success Center	Staff	Dept Head/Director	Dept Head/Director

- The number next to each tab title indicates how many active items for your department are within a particular stage (position request, posting, hiring proposal).

To add an item to your watch list, open the posting by clicking on the **Title** and then clicking on **Add to Watch List**.

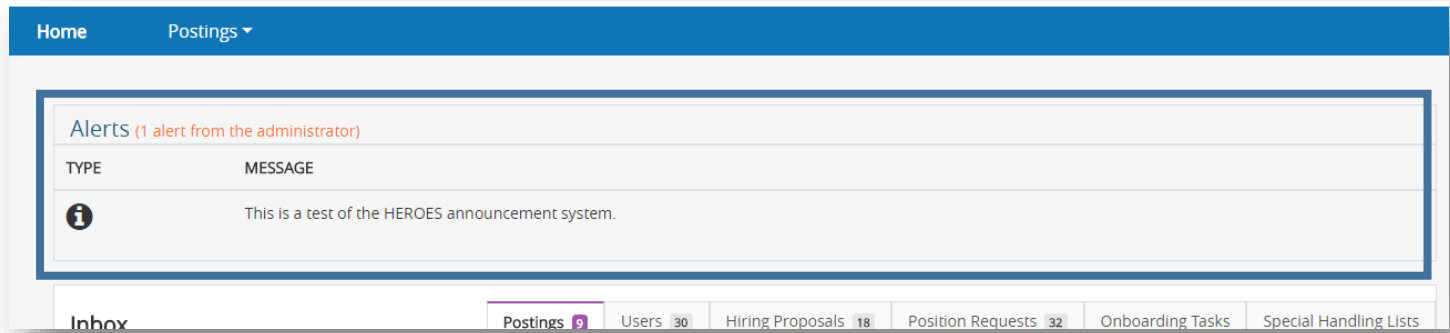
TITLE	CURR
Director of IT Security and Compliance Information Technology Services	Poste
Human Resources Consultant Human Resources	Clo
Assistant to University Legal Counsel President's Office	Fille

- ★ See how Posting looks to Applicant
- 🖨️ Print Preview (Applicant View)
- 🖨️ Print Preview
- 🔖 Add to Watch List

f t in

Alerts

If there are any active **alerts** from Oregon Tech HR, they will appear above the Inbox.



My Links

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

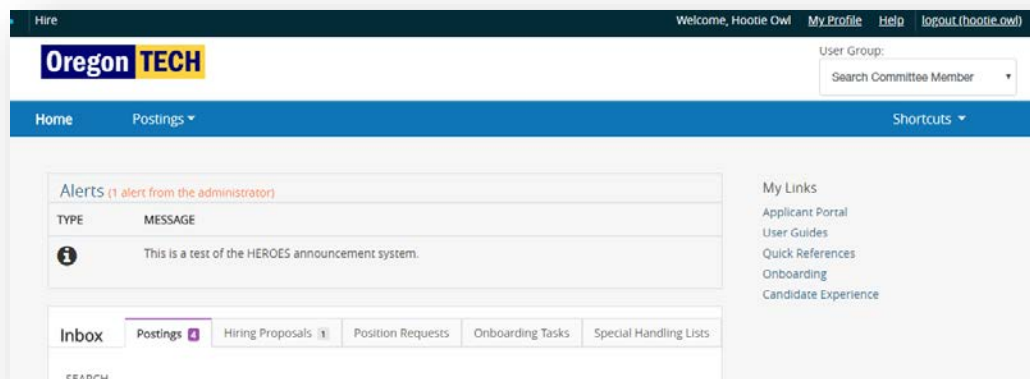
Modules

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

- Positions (not covered-not part of search committee access)
- Hire (this is where recruitments are housed)
- Onboard (this is for new employee paperwork, resources, etc.)

Hire Module (Blue banner)

The **Hire module** provides users with access to view applications to recruitments for which they are serving on a search committee.

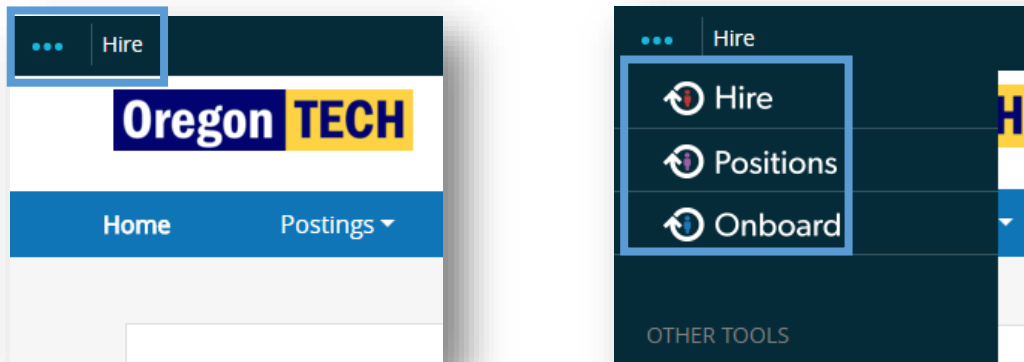


- **Postings** are announcements of job vacancies / job openings. Applicants apply to postings and HEROES gathers applications into one central location in the Applicant Tracking module.

- Postings are typically created from a position description once the position description has been finalized and approved.

Switching Between Modules

If you accidentally navigate away from the Hire module (blue banner), *click on the ellipses (...)* and then click on *Hire*.



Roles

Roles are collections of permissions, not groups of people. The HEROES roles are described in the table below under the heading *Role Definitions*.

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

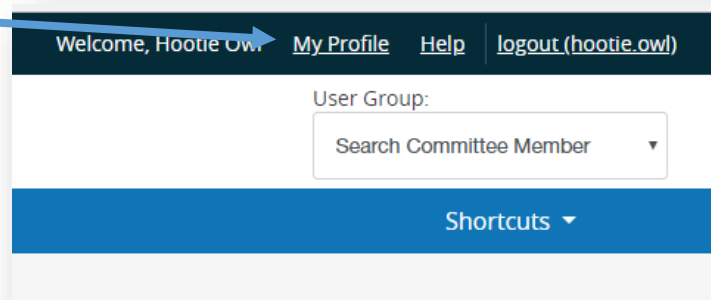
Department User	The Department User role has access to items within their assigned department(s). The role can initiate new position descriptions, view or modify existing position descriptions, and view pending position requests for their department. Department users are able to initiate new and view 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.

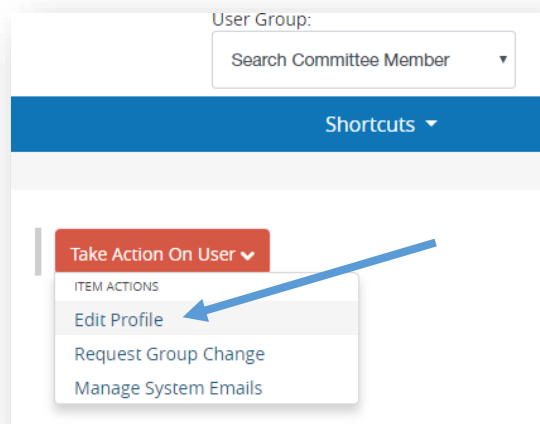
Setting Your Preferred Role and Module at Login

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

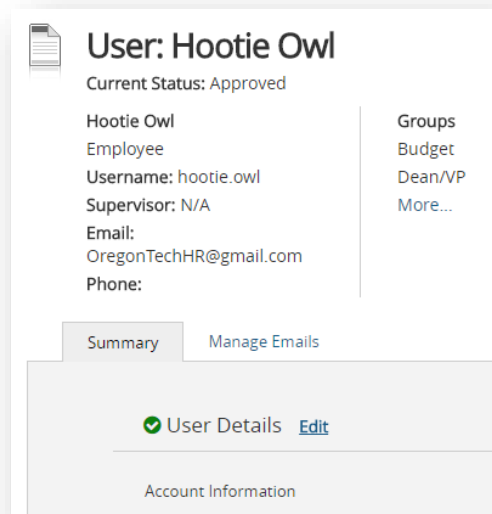
- Click on **My Profile** from the menu bar at the top of the screen.



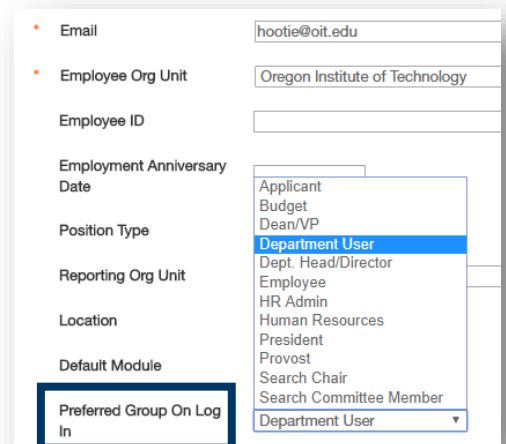
- Navigate to the **Take Action On User** button near the upper right corner and select **Edit Profile...**



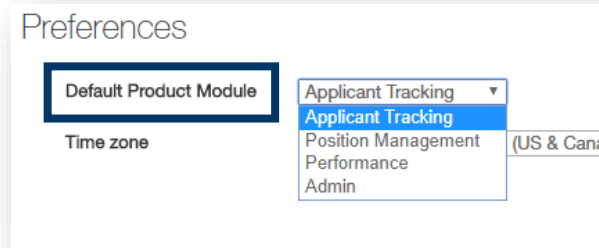
... OR click on **Edit** next to **User Details** in the tabbed section below the user information.



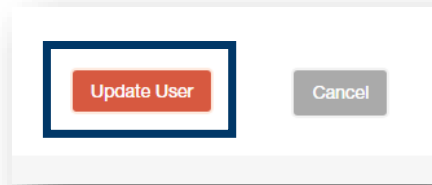
- Under Account Information, find **Preferred Group On Log In** and click on the dropdown to select the role you want to be logged into upon signing in.
 - Depending on your assigned role(s), your list may be different than Hootie's is in the screen shot below.



- 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.



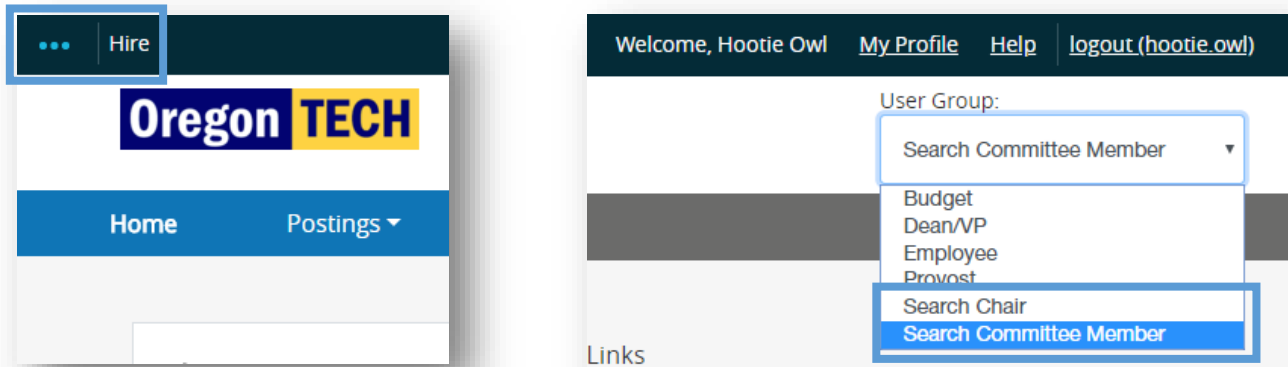
- Click on **Update User** button on the right side of the screen (top and bottom of the page) to save the changes.



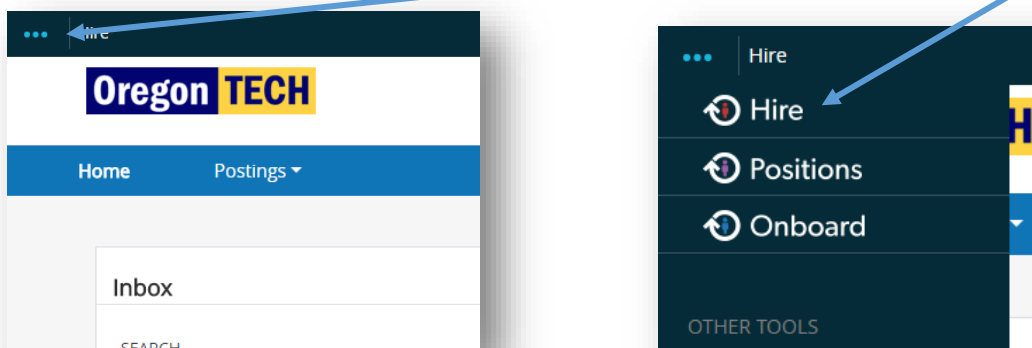
End of Section

Accessing Applicant Materials

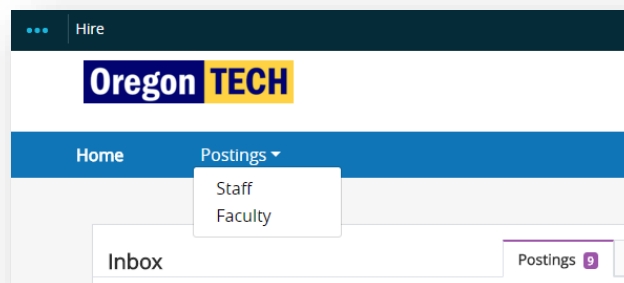
Make sure you are in the **Hire** module (blue banner) and are logged into the Search Chair or Search Committee Member role (whichever is applicable for the recruitment).



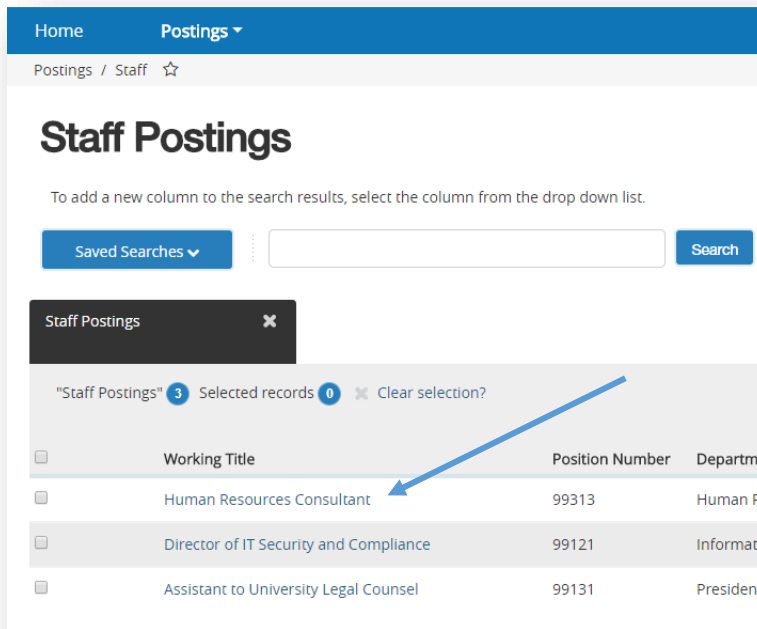
If HEROES does not automatically log you into Hire, click on the ellipses (...) and then click on **Hire**.



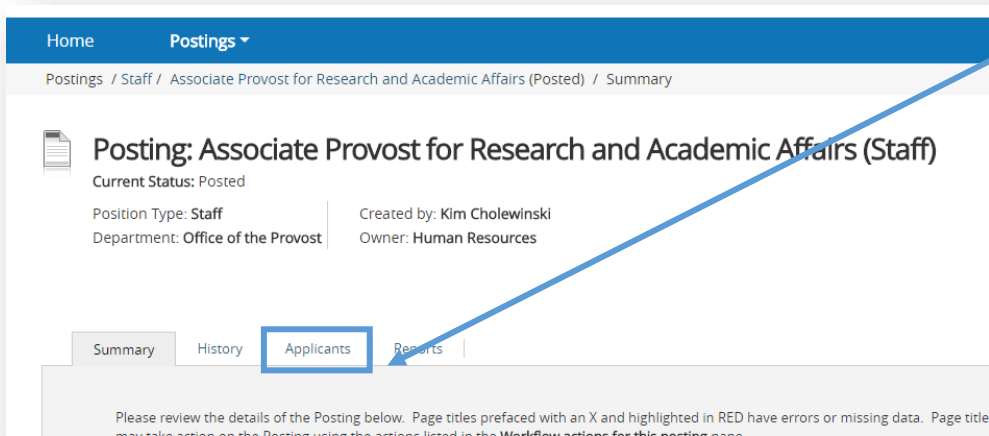
Click on **Postings** and select **Staff** or **Faculty**.



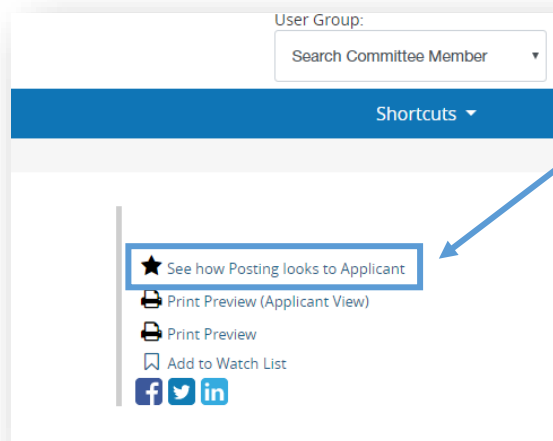
Click on the Working Title link to open the posting.



Clicking on the link will open the summary page of the posting. To access the applicants, click the **Applicants** tab.



If you are interested in seeing how the posting looks to the applicant, click on this link.



Clicking on the Applicants tab brings up a list of the applicants and their application documents.

Summary | History | Applicants | Reports

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

Saved Searches Search More Search Options

All Applicants

"All Applicants" 4 Selected records 0 Clear selection? Actions

	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	(Actions)
<input type="checkbox"/>	Beaver	Benny	Resume, Letter of Recommendation, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:20 PM	Actions
<input type="checkbox"/>	Owl	Hootie	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:22 PM	Actions
<input type="checkbox"/>	Cougar	Butch	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:24 PM	Actions
<input type="checkbox"/>	Duck	Donald	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:26 PM	Actions

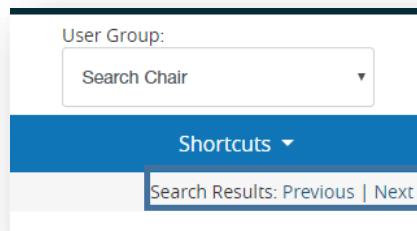
To view an individual applicant's application, click on the **Applicant Last Name** link.

Applicant Last Name	Applicant First Name	Documents	Post Num
Beaver	Benny	Resume, Letter of Recommendation, Cover Letter	S000
Owl	Hootie	Resume, Cover Letter	S000
Cougar	Butch	Resume, Cover Letter	S000
Duck	Donald	Resume, Cover Letter	S000

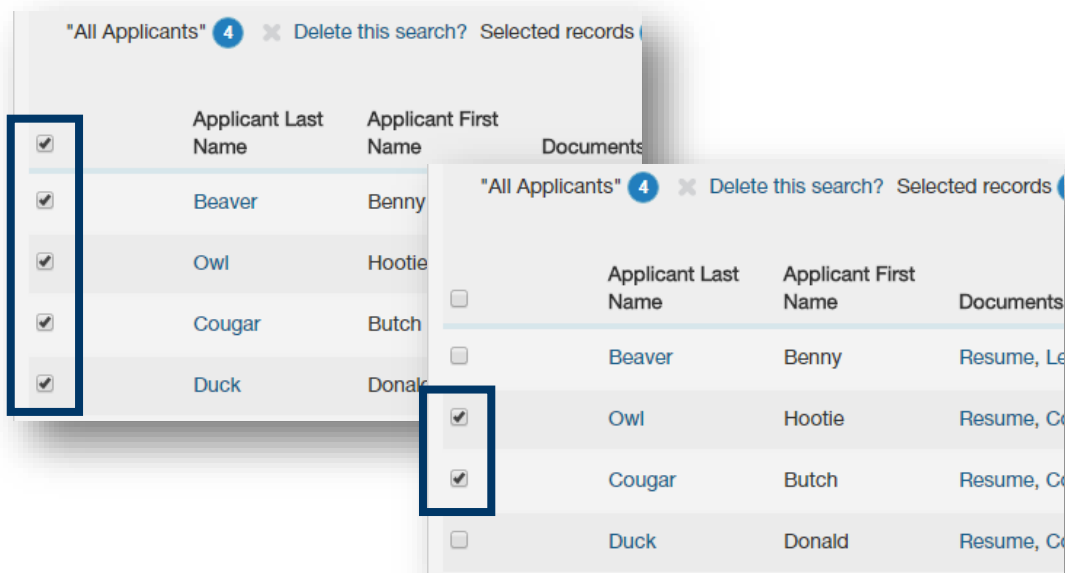
To view materials that were uploaded with the individual application, click on the **Document** name link (e.g. Resume).

**Please note that not all recruitments require additional documentation to be uploaded with an application.*

Quickly toggle between applications by using the **Previous** and **Next** buttons near the header.



To download and view multiple applications and their associated additional documentation, select all candidates at one time by clicking on the checkbox in the header OR click on the check box next to the applicants for which you want to review their applications.



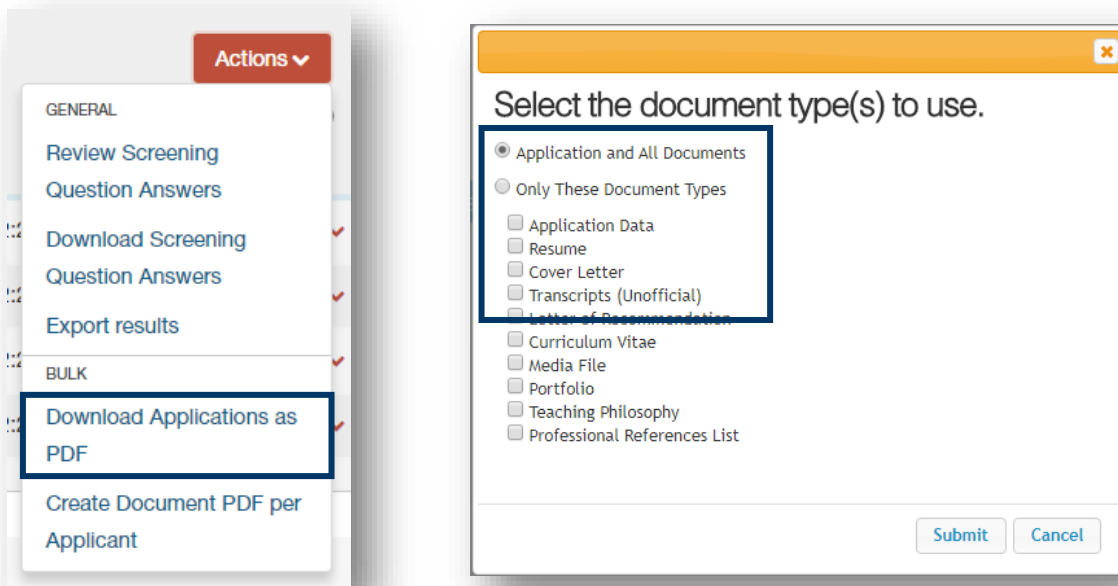
Hover over the **Actions** button and select **Download Applications as PDF**. This will combine all of the selected applications into one PDF document.



The screenshot shows a table with 7 columns: Applicant Last Name, Applicant First Name, Documents, Posting Number, Workflow State (Internal), and Application Date. There are 4 rows of data. An 'Actions' button is highlighted in the top right corner of the table area.

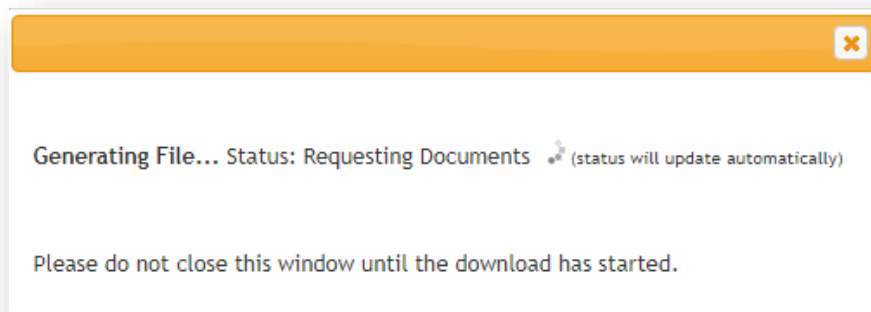
	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	
<input type="checkbox"/>	Beaver	Benny	Resume, Letter of Recommendation, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:20 PM	Actions ▾
<input type="checkbox"/>	Owl	Hootie	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:22 PM	Actions ▾
<input type="checkbox"/>	Cougar	Butch	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:24 PM	Actions ▾
<input type="checkbox"/>	Duck	Donald	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:26 PM	Actions ▾

And then select the documents to download. **All Documents** is selected by default.



The first screenshot shows the 'Actions' dropdown menu with 'Download Applications as PDF' highlighted. The second screenshot shows the 'Select the document type(s) to use' dialog box with 'Application and All Documents' selected.

The download may take a few moments. During the time the system is downloading, the following screen will appear.



The screenshot shows a dialog box with the text: 'Generating File... Status: Requesting Documents (status will update automatically)'. Below this, it says 'Please do not close this window until the download has started.'

Once the download is complete, the application materials will appear.

Page 8 of 25 | Created 10-04-2017 16:19:23 | Office Specialist 2

Application: Hootie Owl

Posting number: S00019P
Posting: Office Specialist 2 (Staff)
Form: Classified Application
Submitted: September 18, 2017 at 02:22 PM (confirmation number: CN000000069)

Personal Information

Contact Information

First Name	Hootie
Middle Name	T.

If the applications opened in the same tab/browser window as the posting, click the back button on your browser to return to the applicant list.

At the completion of the search, remember to delete any application materials from HEROES that saves to your computer or network.

If you take notes on electronic copies of application material, please forward them to oithr@oit.edu before deleting.

End of Section

Changing Candidates' Statuses

The search chair has a unique role in HEROES. In addition to standard chair duties, the search chair also is responsible for changing applicant statuses in the system to:

- Advance applicants to an interview stage
- Eliminate an un- or under-qualified candidate from a recruitment.
- Document reasons for non-selection.

To change an applicant's status, click on the **Applicant Last Name** link.

The screenshot shows the 'Applicants' tab in the HEROES system. At the top, there are tabs for 'Summary', 'History', 'Applicants', and 'Reports'. Below the tabs, there is a search bar with a 'Saved Searches' dropdown, a search input field, and buttons for 'Search' and 'More Search Options'. A table titled 'All Applicants' is displayed, showing 4 records. The table has columns for 'Applicant Last Name', 'Applicant First Name', 'Documents', 'Posting Number', 'Workflow State (Internal)', and 'Application Date'. The 'Applicant Last Name' column is highlighted, and a blue arrow points from the text above to this column header. The table contains the following data:

Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date
Beaver	Benny	Resume, Letter of Recommendation, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:20 PM
Owl	Hootie	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:22 PM
Cougar	Butch	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:24 PM
Duck	Donald	Resume, Cover Letter	S00019P	Under Review by Search Committee	September 18, 2017 at 02:26 PM

Identifying Candidates for Phone and Campus Interviews

To *advance a candidate to the next stage* of the recruitment, hover over the **Take Action On Job Application** button then click on the applicable next stage of the recruitment (Phone Interview or Campus Interview).

The first screenshot shows the 'Take Action On Job Application' dropdown menu with the following options:

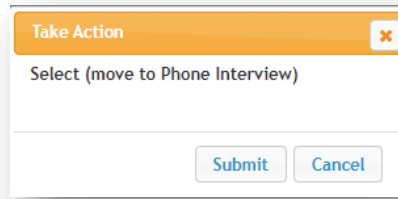
- ★ View Posting Applied To
- ★ Preview Application

The second screenshot shows the 'Take Action On Job Application' dropdown menu with the following options:

- Keep working on this Job application
- WORKFLOW ACTIONS
- Select (move to Phone Interview)
- Select (move to Campus Interview)
- Select (move to Not Interviewed, Not Selected - Email at Filled)

A blue arrow points to the 'Select (move to Phone Interview)' option.

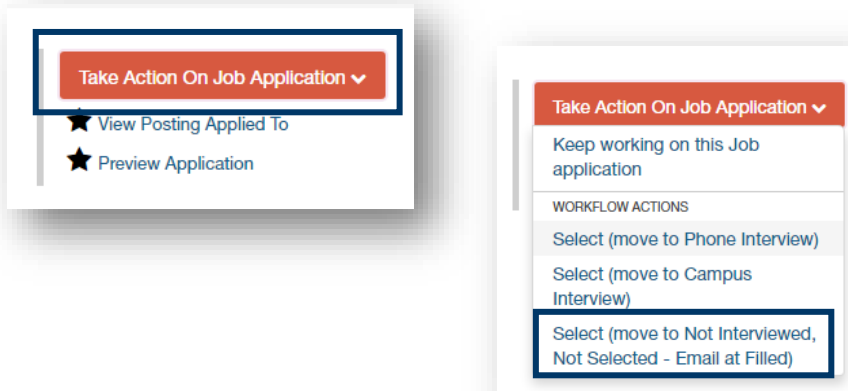
And then confirm your selection.



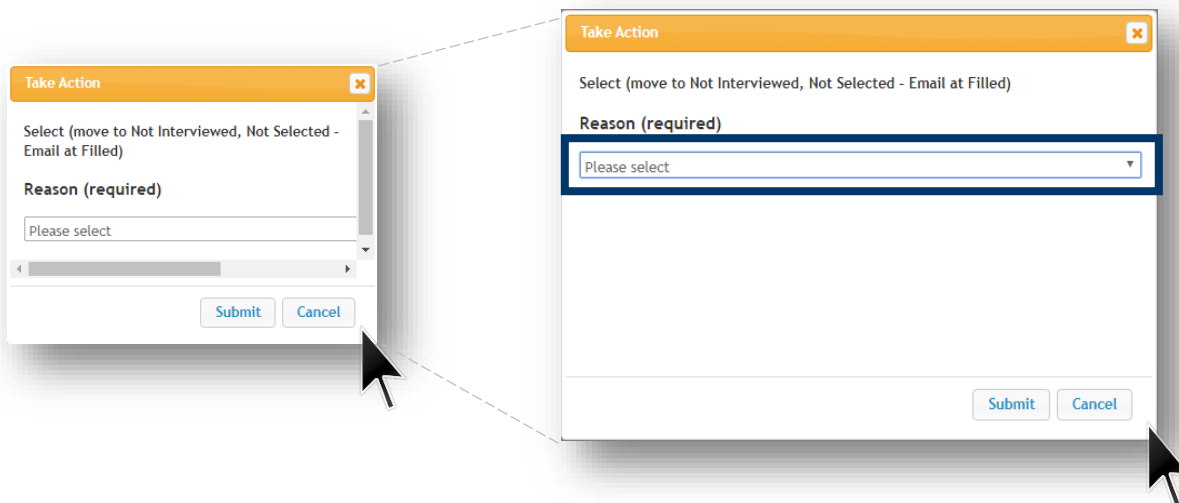
Repeat these steps for each candidate that is being advanced to the next stage of the recruitment.

Documenting Reasons for Non-Selection

To *remove a candidate from consideration* at the *application stage*, hover over the **Take Action On Job Application** button and then click on **Select (move to Not Interviewed, Not Selected – Email at Filled)**.



You may need to resize the next window to see all the information. To resize, click and hold on a corner of the window and drag until all of the information is visible.

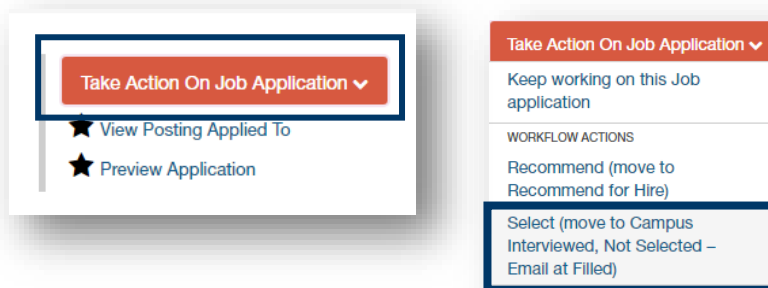


Select the most appropriate general reason for non-selection from the dropdown AND enter a specific explanation related to the selected general reason for non-selection. **Completion of both sections is required.**

And then click **Submit**.

Repeat these steps for each candidate that is being advanced beyond the application stage of the recruitment.

To remove a candidate from consideration after either the *phone interview* or *campus interview* stage, hover over the **Take Action On Job Application** button and then click on **Select (move to Campus Interviewed, Not Selected – Email at Filled)** OR **Select (move to Phone Interviewed, Not Selected – Email at Filled)**, whichever is applicable.



Select the most appropriate general reason for non-selection from the dropdown AND enter a specific explanation related to the selected general reason for non-selection. **Completion of both sections is required.**

Click **Submit**.

Repeat these steps for each candidate that is not being advanced beyond an interview stage of the recruitment.

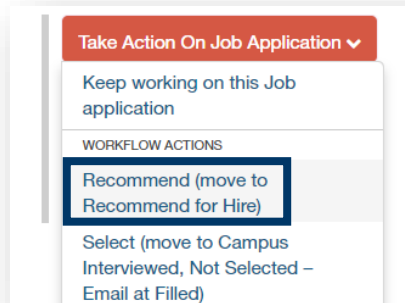
End of Section

Recommending a Candidate for Hire

After the campus/on-site interview, the search chair will need to initiate the Recommendation for Hire process.

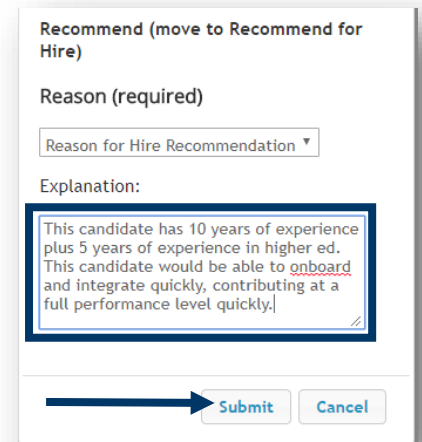
The candidate must be at the status of Campus Interview in order to recommend for hire.

Change the identified candidate's status to Recommended for Hire.



Enter the reason for recommendation into the text box provided (**required**) and then click **Submit**.

This will send an email to the hiring authority (e.g. Department Chair/Director), prompting them to start the hiring proposal process.

A screenshot of a form titled "Recommend (move to Recommend for Hire)". The form contains a "Reason (required)" section with a dropdown menu currently set to "Reason for Hire Recommendation". Below this is an "Explanation:" section with a text area containing the text: "This candidate has 10 years of experience plus 5 years of experience in higher ed. This candidate would be able to onboard and integrate quickly, contributing at a full performance level quickly." The text area is highlighted with a blue rectangular box. At the bottom of the form, there are two buttons: "Submit" and "Cancel". A blue arrow points to the "Submit" button.

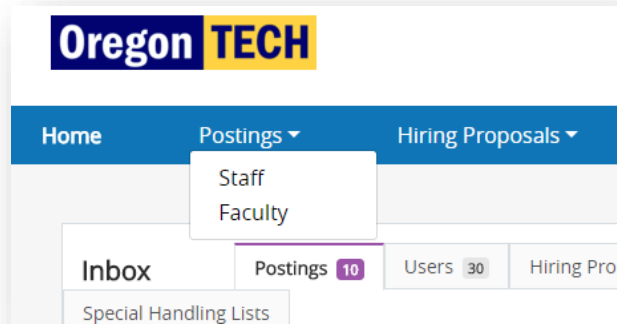
End of Section

Appendix I: How to Find a 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.



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



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

End of Section

Appendix II: 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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