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

Position Descriptions

Supervisor Guide

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Introduction

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

Tasks Available in HEROES*:

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

*dependent upon assigned role and department

Best Web Browsers to Use

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

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

Security of Information / Applicant Data

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

System Questions

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

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

541.885.1120
oithr@oit.edu

User Expectations

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

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

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

Logging Into HEROES

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

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

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

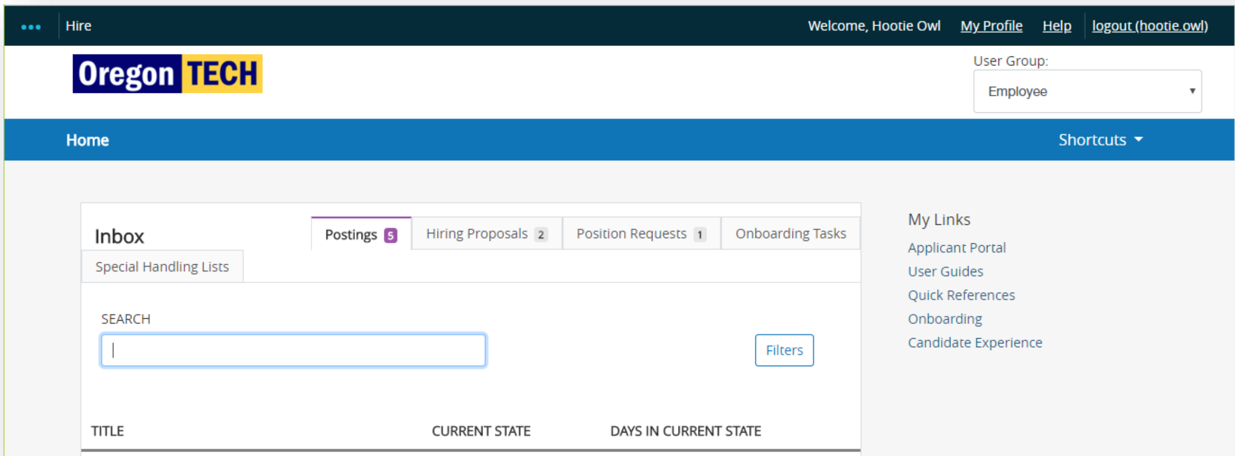
If you experience any issues with the login, please call 541.885.1120.

HEROES Navigation Essentials & System Terminology

Key system terms are bolded.

The Home Page

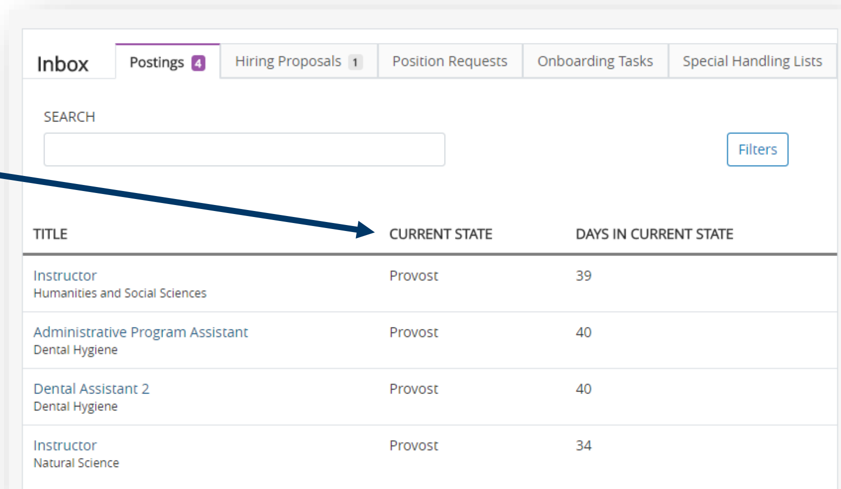
This is the page you see when you log in.



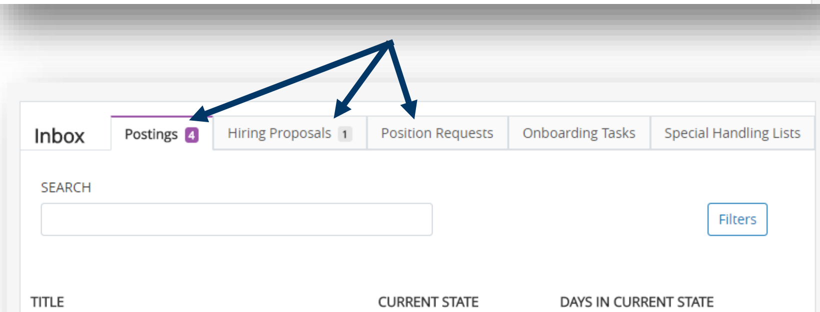
It presents a dashboard that provides access to:

Summary views of your Inbox and Watch List.

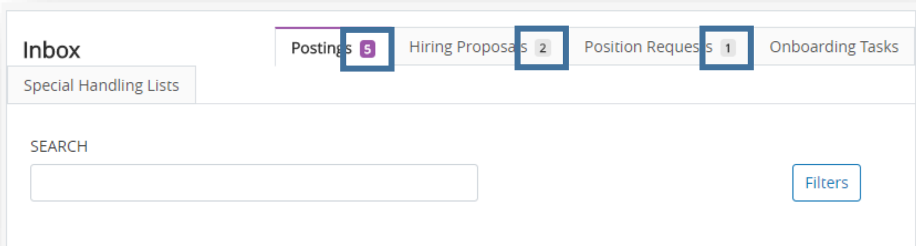
The **Inbox** shows where items are in the workflow.



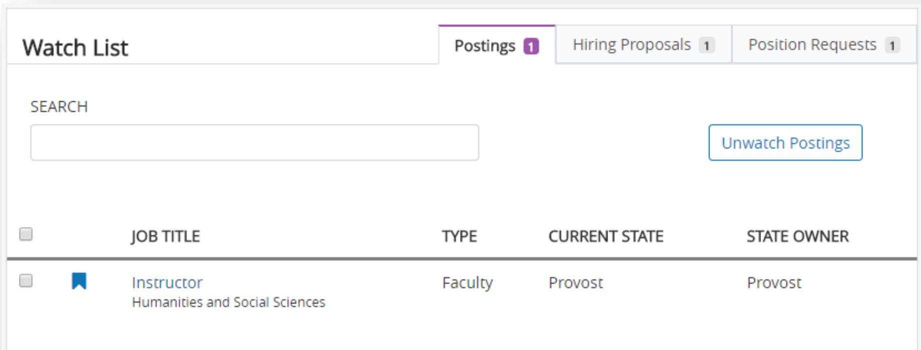
- Navigate between the three main Inbox tabs by clicking on the tab names.



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

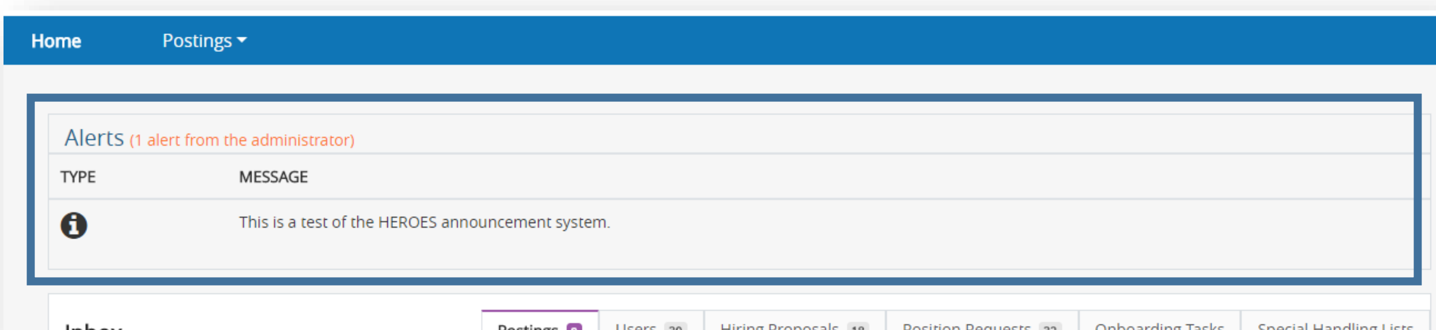


- The **Watch List** allows you to follow the progress of specific items. The Watch List shows you where items are in the workflow. Items are automatically removed from your Watch List when they are completed or canceled.



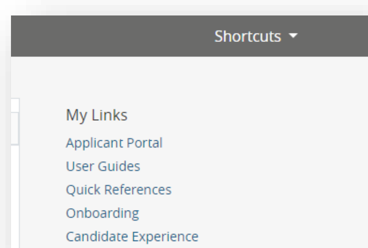
Alerts and Other Announcements

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.



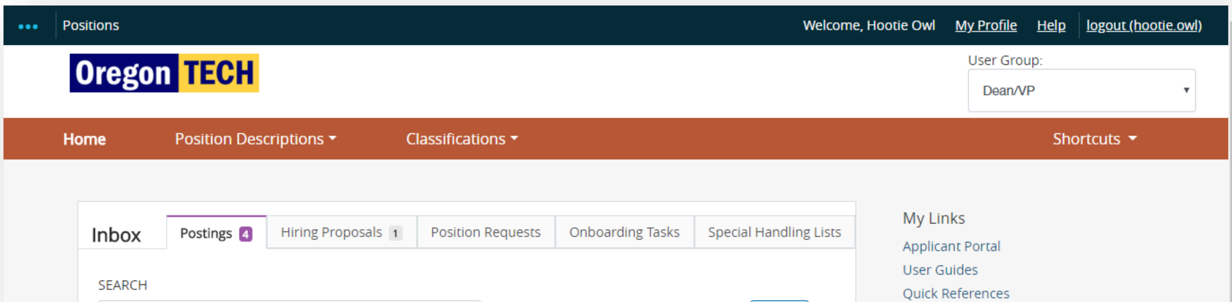
Modules

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)

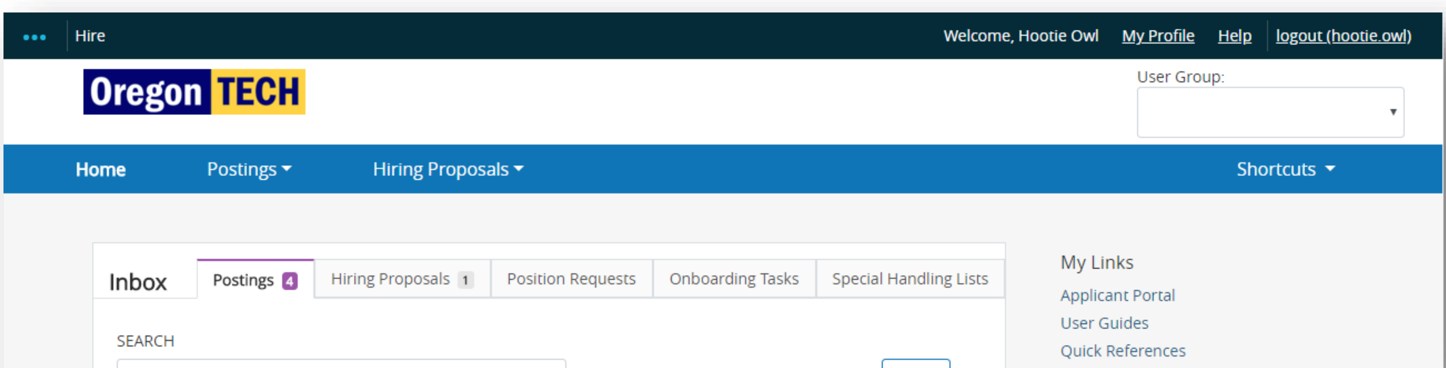
The **Positions module** gives the Supervisor, Department User, and Department Head/Director role access to create new position descriptions and to view and/or modify existing position descriptions.



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/Director user access to create and view postings, to create and view hiring proposals, and to view applicants.

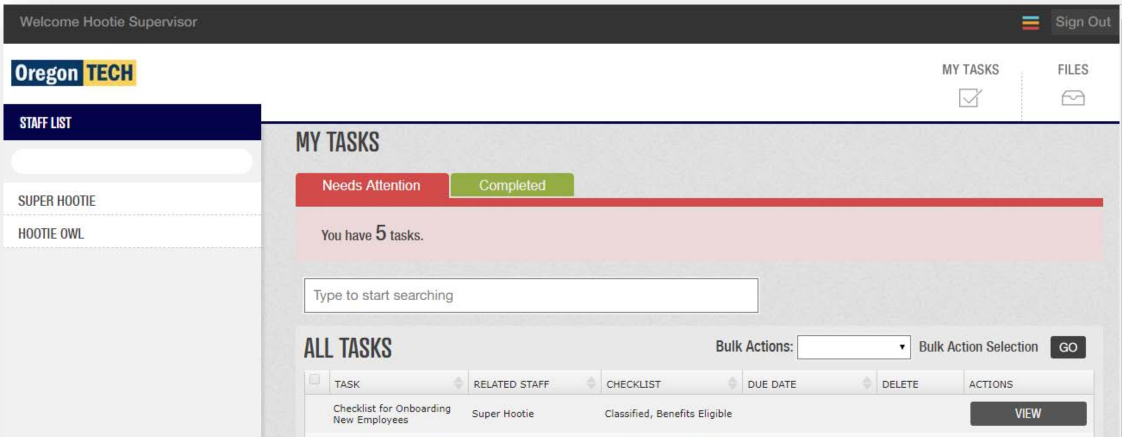


- **Postings** are announcements of job vacancies / job openings. Applicants apply to postings and HEROES gathers applications into one central location in the Hire module.
    - Postings are typically created from a position description once the position description has been finalized and approved.

- 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.

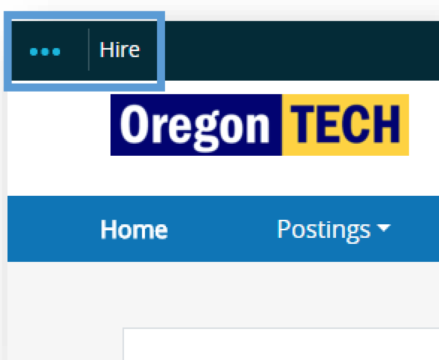
Onboard Module

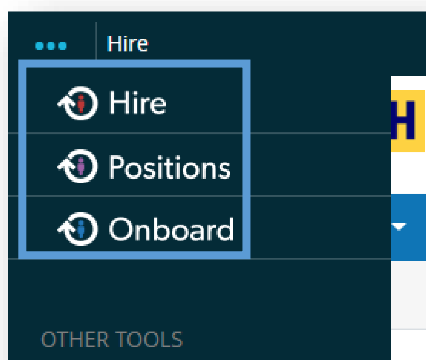
The **Onboard module** is used to onboard new employees and provide hiring managers with resources to assist with onboarding new employees.



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.

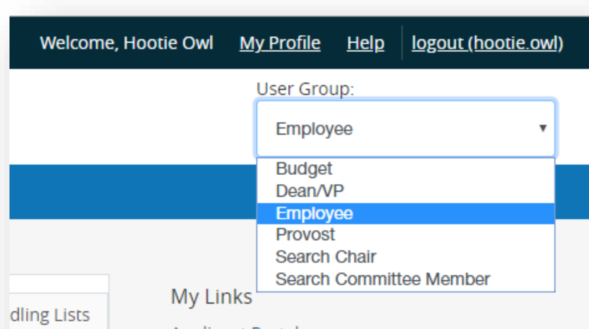
Depending on your position at Oregon Tech, you may have access to multiple roles. If you cannot access the area where you need to work, check your current role and change if necessary.

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



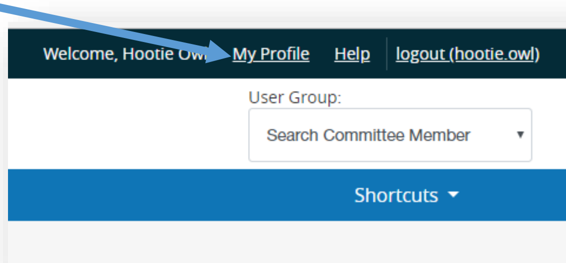
To switch between roles, click on the role drop down list at the top right of your screen click on the role you need to use.

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).

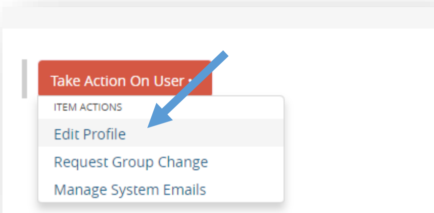
Setting Your Preferred Role and Module at Login

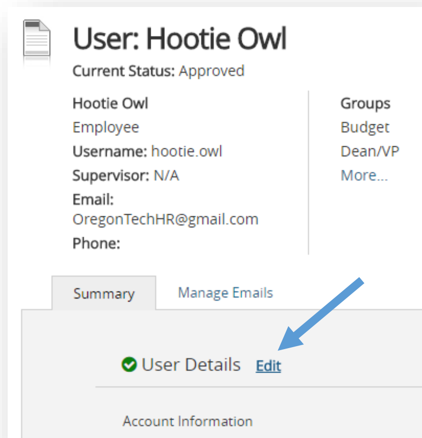
To set the system to default on log in to a particular role and/or module, follow these steps:

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

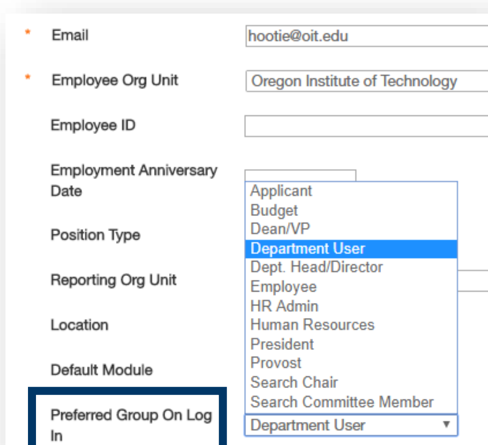


- Navigate to the **Take Action On User** button near the upper right corner and select **Edit Profile** OR click on **Edit** next to **User Details** in the tabbed section below the user information.

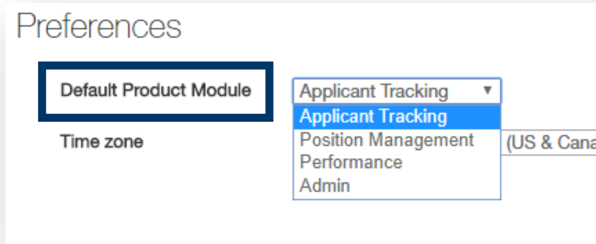




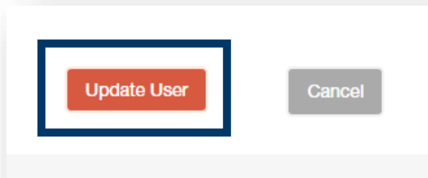
- Under Account Information, find **Preferred Group On Log In** and click on the dropdown to select the role you want to be logged into upon signing in.
    - Depending on your assigned role(s), your list may be different than Hootie's is in the screen shot below.



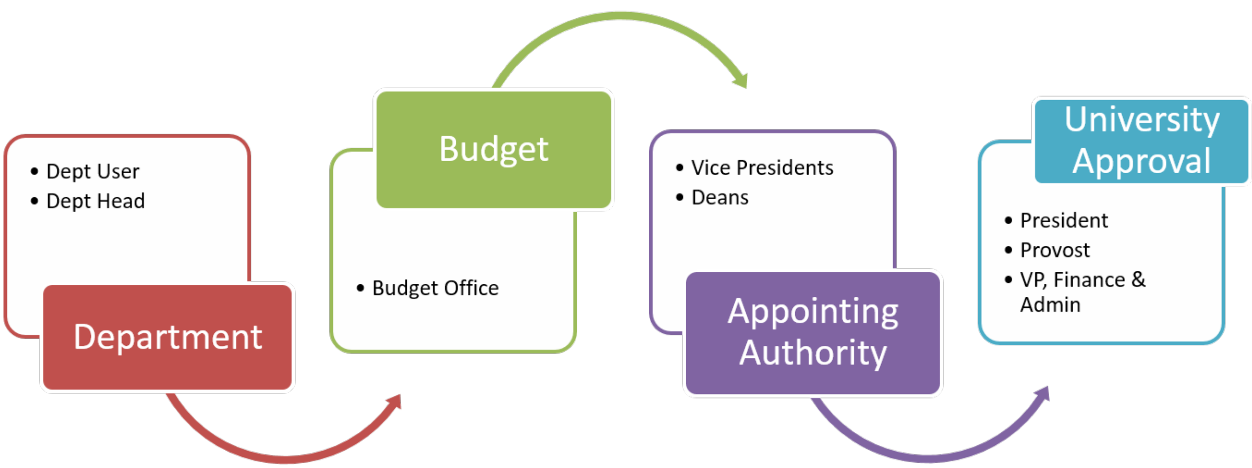
- Under Preferences, find **Default Product Module** and click on the dropdown to select the module you want to be automatically logged in to upon signing in.



- 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

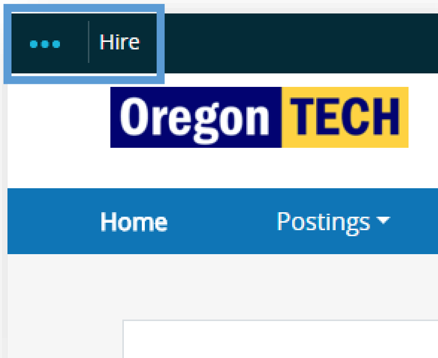


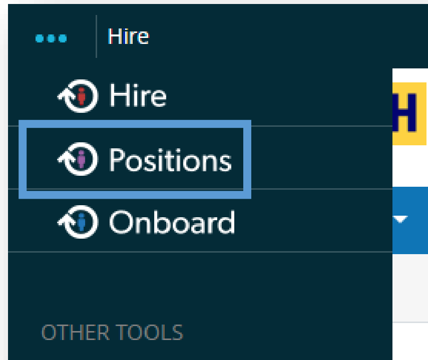
End of Section

Viewing Employees' Position Descriptions

Switch to the **Position** module (orange banner).

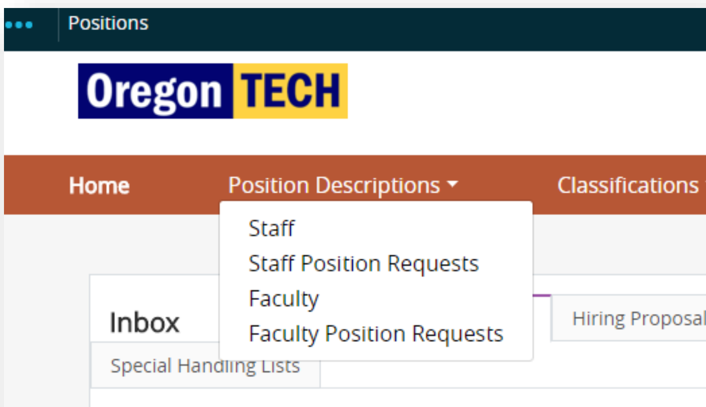
If you are not in a screen with an orange banner, click on the **...** in the upper left corner (will likely say Hire) and choose **Positions**.





This will open the Position Management module. The Position Management module is where position descriptions are stored.

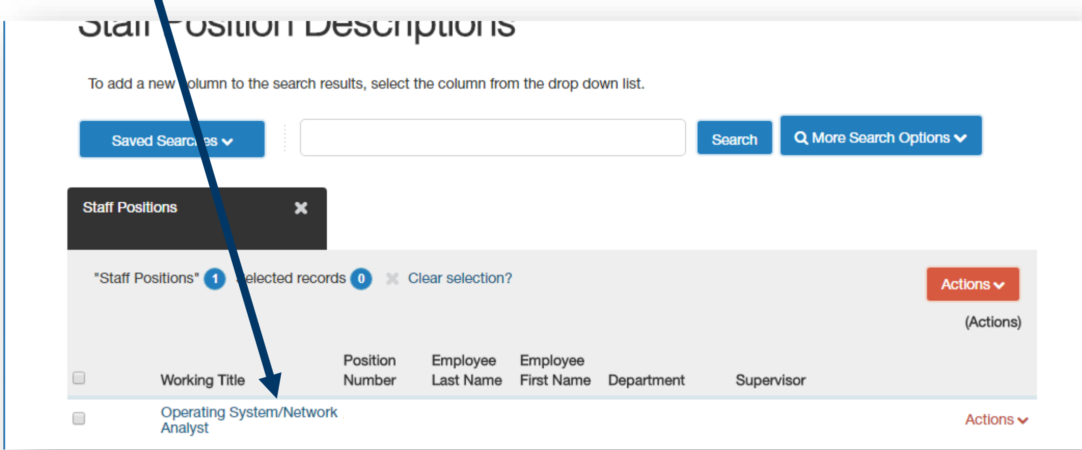
Click on **Position Descriptions** in the header



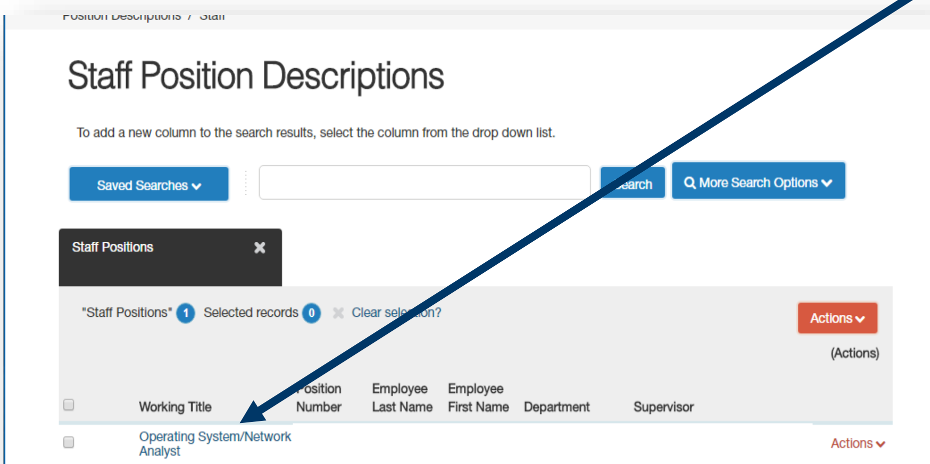
Click on **Staff** or **Faculty**.

After you click on Staff or Faculty, a Position Descriptions screen will open. This will list the position descriptions for the employees you supervise. (You may be able to see your own position description as well.)

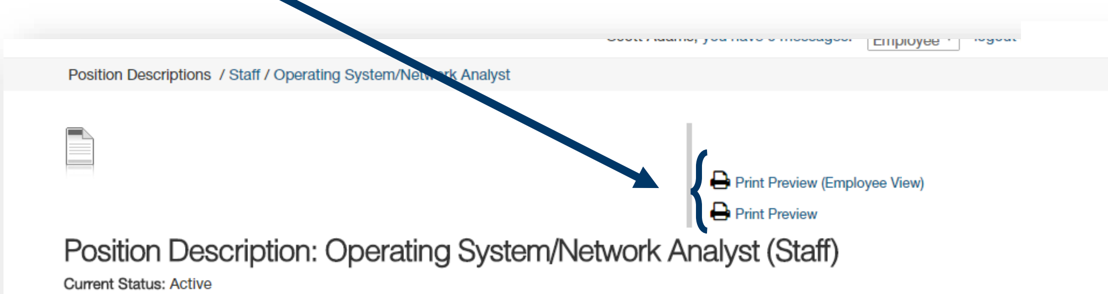
Click on the **Working Title** link (the job title) to open the position description.



After you click on Staff or Faculty, a Staff Position Descriptions screen will open. Click on the **Working Title** link (your job title).



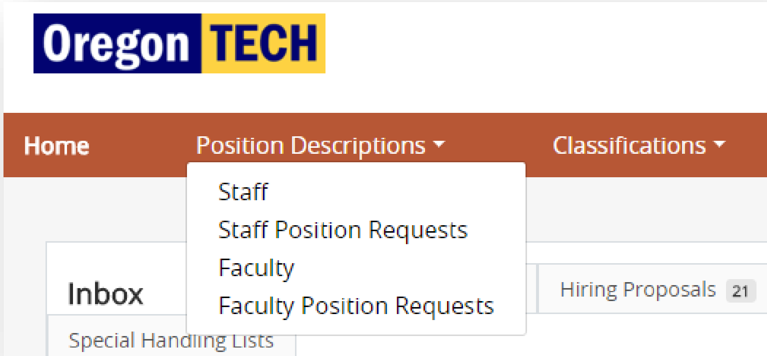
Clicking on the link will open the position description. You can view it in this screen OR open it through two different **print previews**.



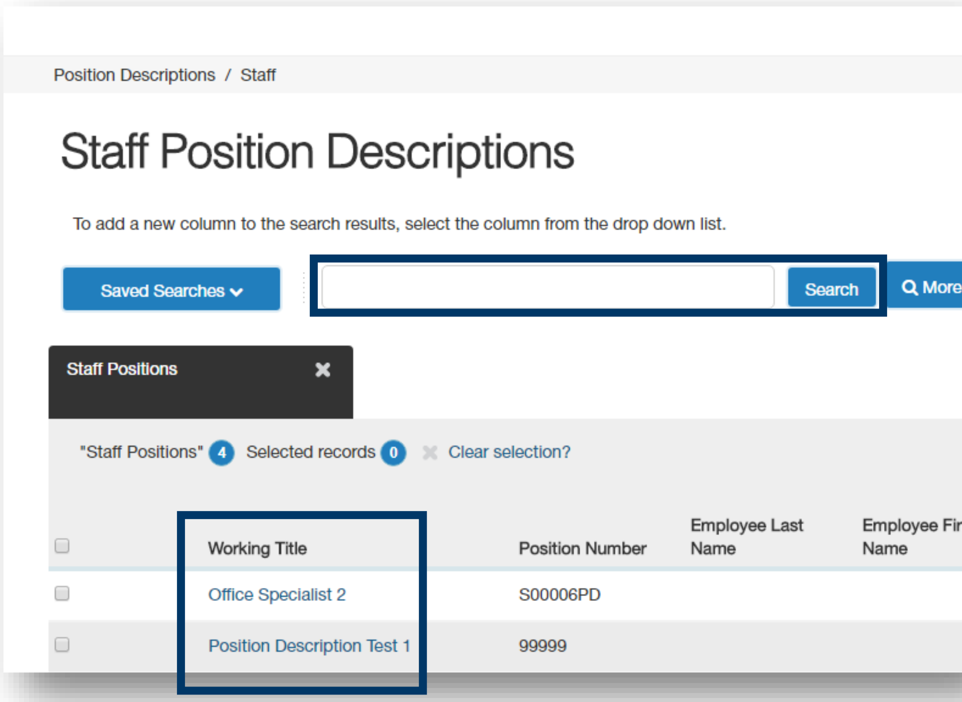
Modifying a Position Description

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

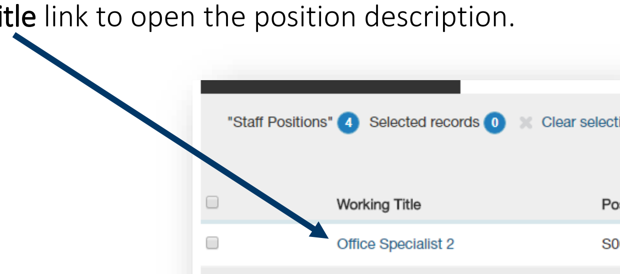
Click on **Position Descriptions** and select **Staff** or **Faculty**, whichever is the position type for the position you need to modify.



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

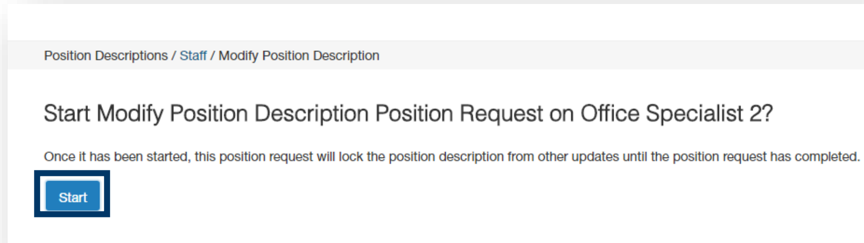


Click on the **Working Title** link to open the position description.



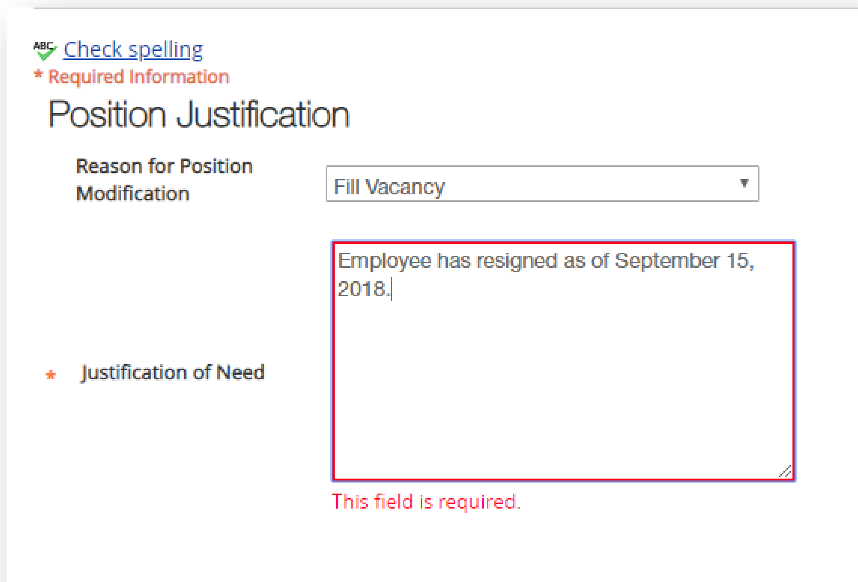
In the upper right corner, click on the ★**Modify Position Description** button.

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



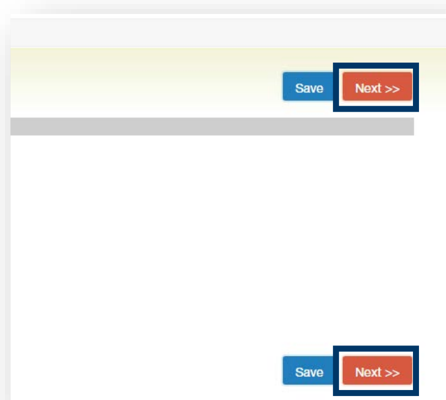
The position title in the next screen will depend on the position description being modified.

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.

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.

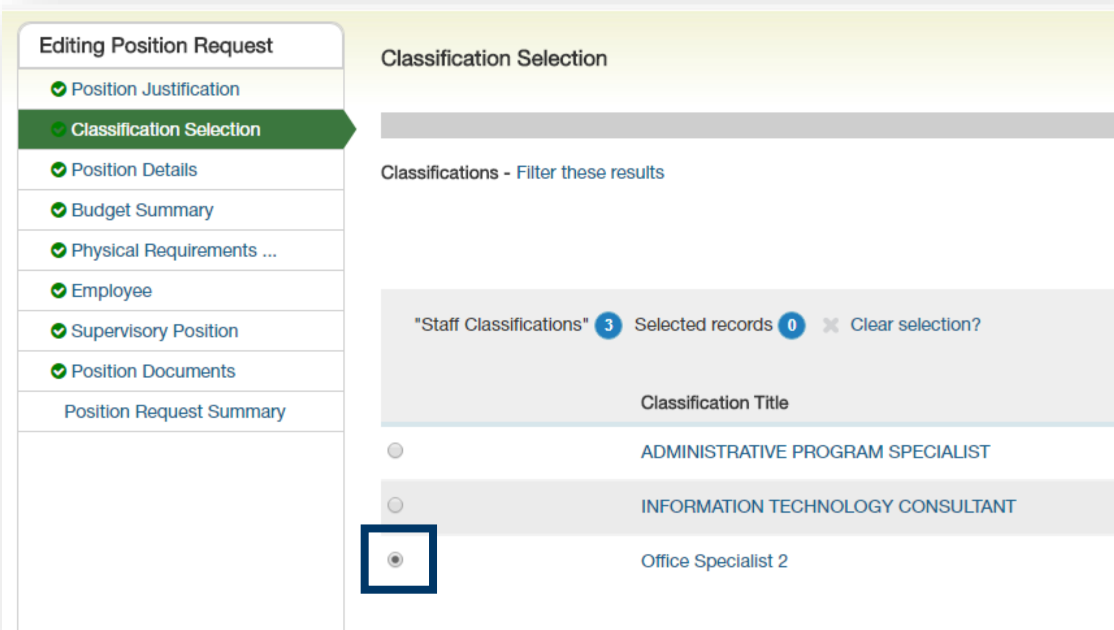


If you need to continue working on the current page but want to save your work, click the **Save** button (located adjacent to the Next button). When you are done working on the page, click **Next** to advance to the next section of the position request.

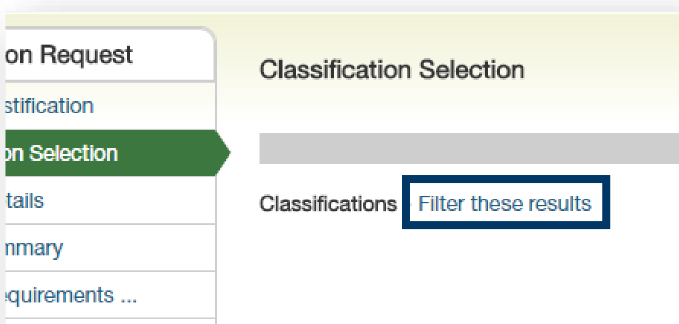
Classification Selection Page

As needed, update 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.*



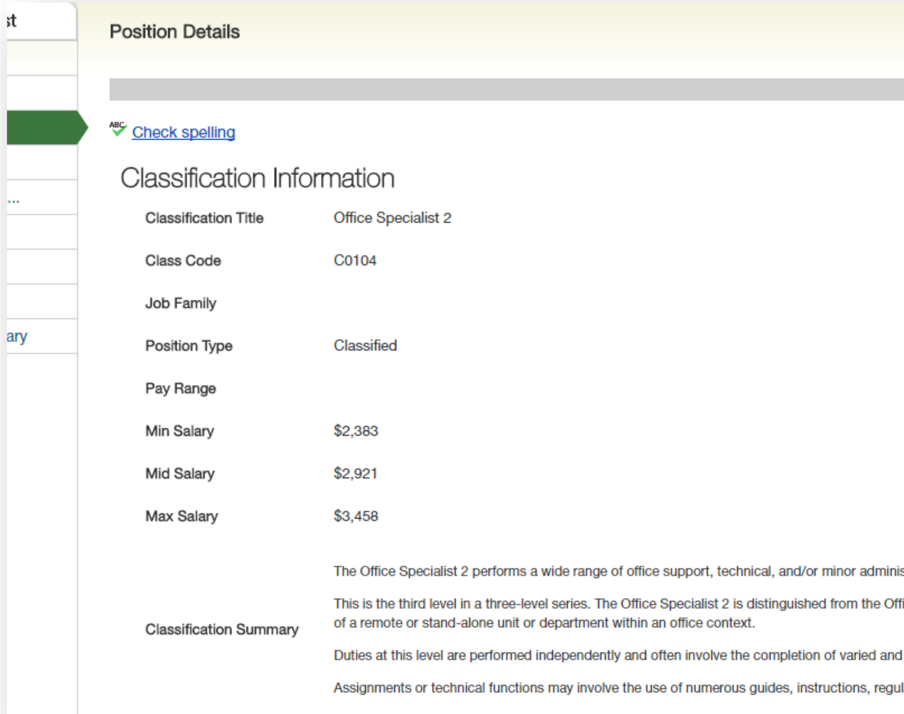
If the Classification is not readily available in the list on the screen, click on **Filter these results** to open the query function.



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.


Position Details

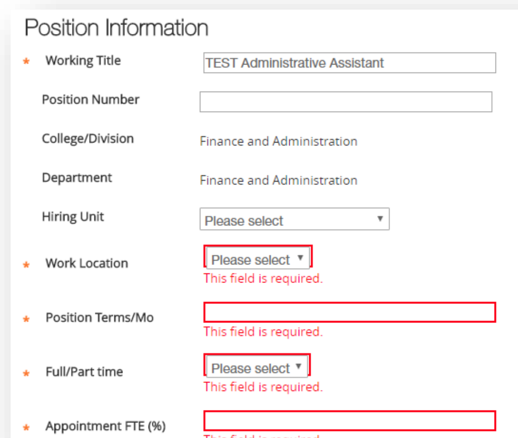
Check spelling

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
Classification Summary	The Office Specialist 2 performs a wide range of office support, technical, and/or minor administ This is the third level in a three-level series. The Office Specialist 2 is distinguished from the Offic of a remote or stand-alone unit or department within an office context. Duties at this level are performed independently and often involve the completion of varied and u Assignments or technical functions may involve the use of numerous guides, instructions, regula

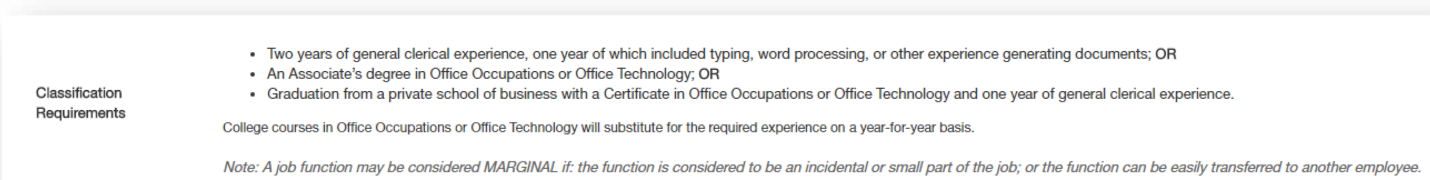
Fields that require completion are indicated with * and are highlighted with a red box.

All fields in the screenshot to the left will be 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.

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

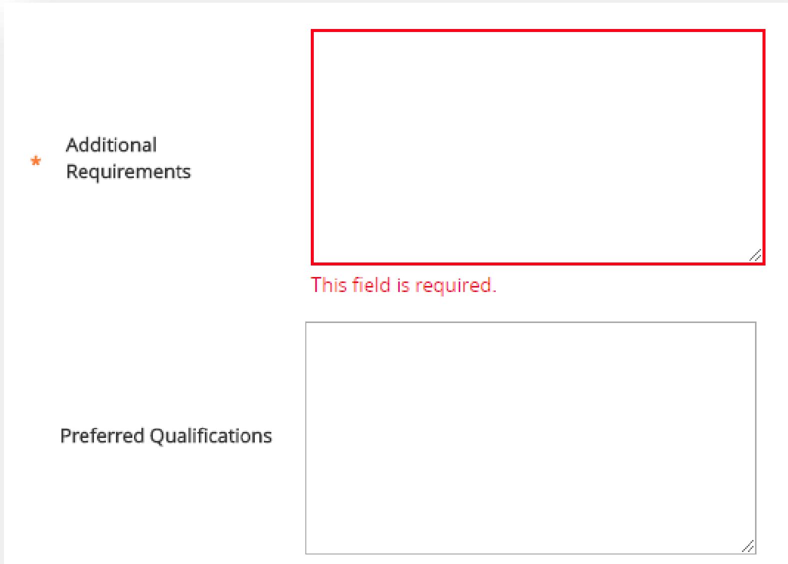

Classification Requirements

- 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.

College courses in Office Occupations or Office Technology will substitute for the required experience on a year-for-year basis.

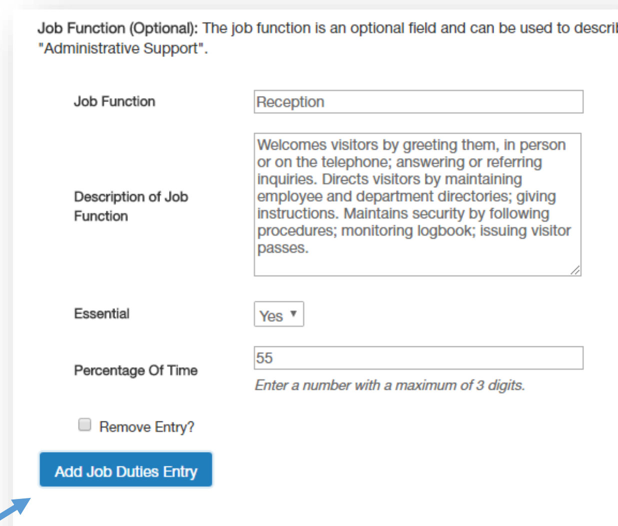
Note: A job function may be considered MARGINAL if: the function is considered to be an incidental or small part of the job; or the function can be easily transferred to another employee.

*Update the **Additional Requirements** and **Preferred Qualifications** fields.



In the **Job Duties** section, make changes to existing duties.

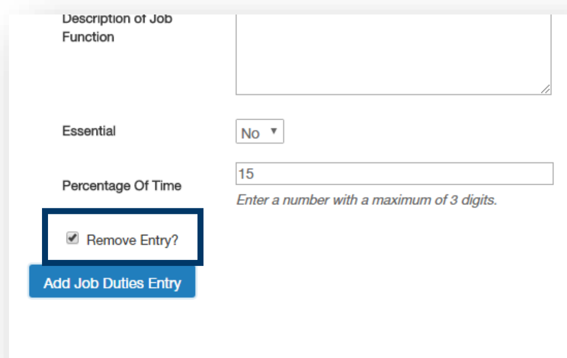
- This section is NOT required for faculty positions.
- For staff position:
    - At least three sections are required.
    - Should have 5-7 sections as a best practice.
    - Must have an Other Duties as Assigned section at 5-10% that is noted as non-essential.
- Duties must total 100%.
- Percentages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



To add new duties, click on the **Add Job Duties Entry** button to add new duties section. Complete the blank fields in the new section.

Repeat the **Add Job Duties Entry** steps until all of the new 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.

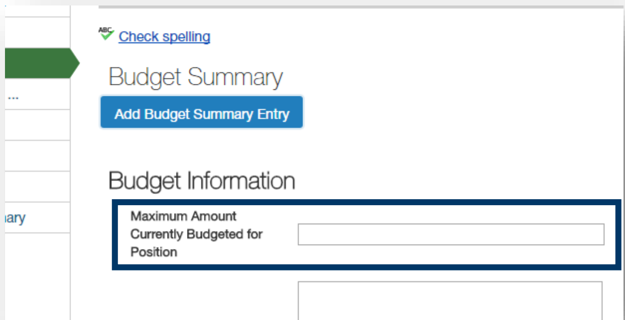


If you need to continue working on the current page but want to save your work, click the **Save** button. When you are done working on the page, click **Next** to advance to the next section of the position request.

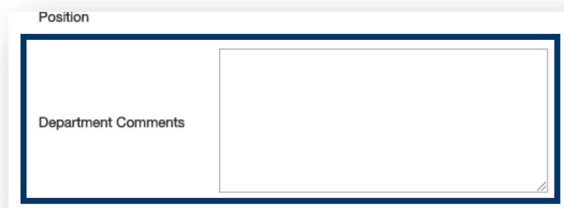
Budget Summary Page

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.

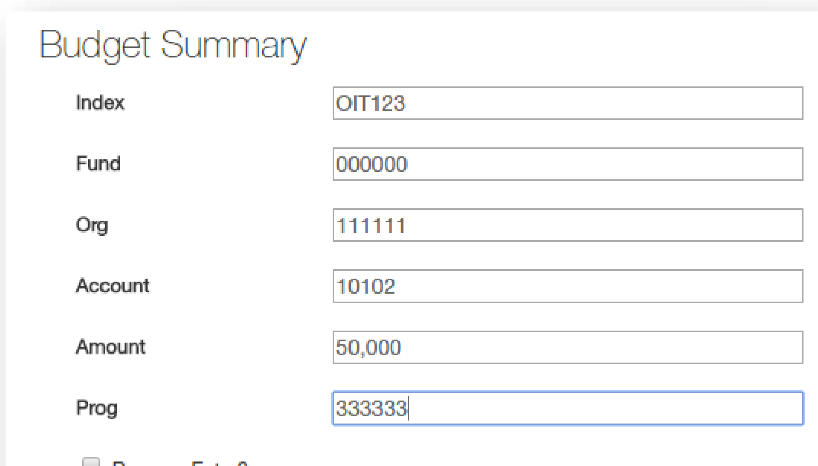


Complete the **Department Comments** field with any information that may be helpful for the Dean/VP approver and/or Budget approver roles.

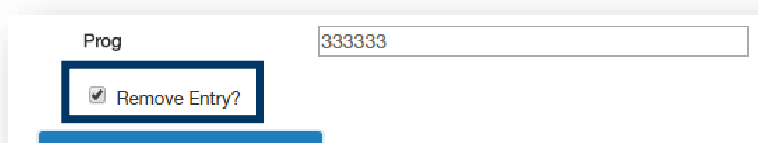


Click on the **Add Budget Summary Entry** button to add new indexes and their related information. Complete the blank fields. Continue these steps until all indexes for the position have been added.

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.



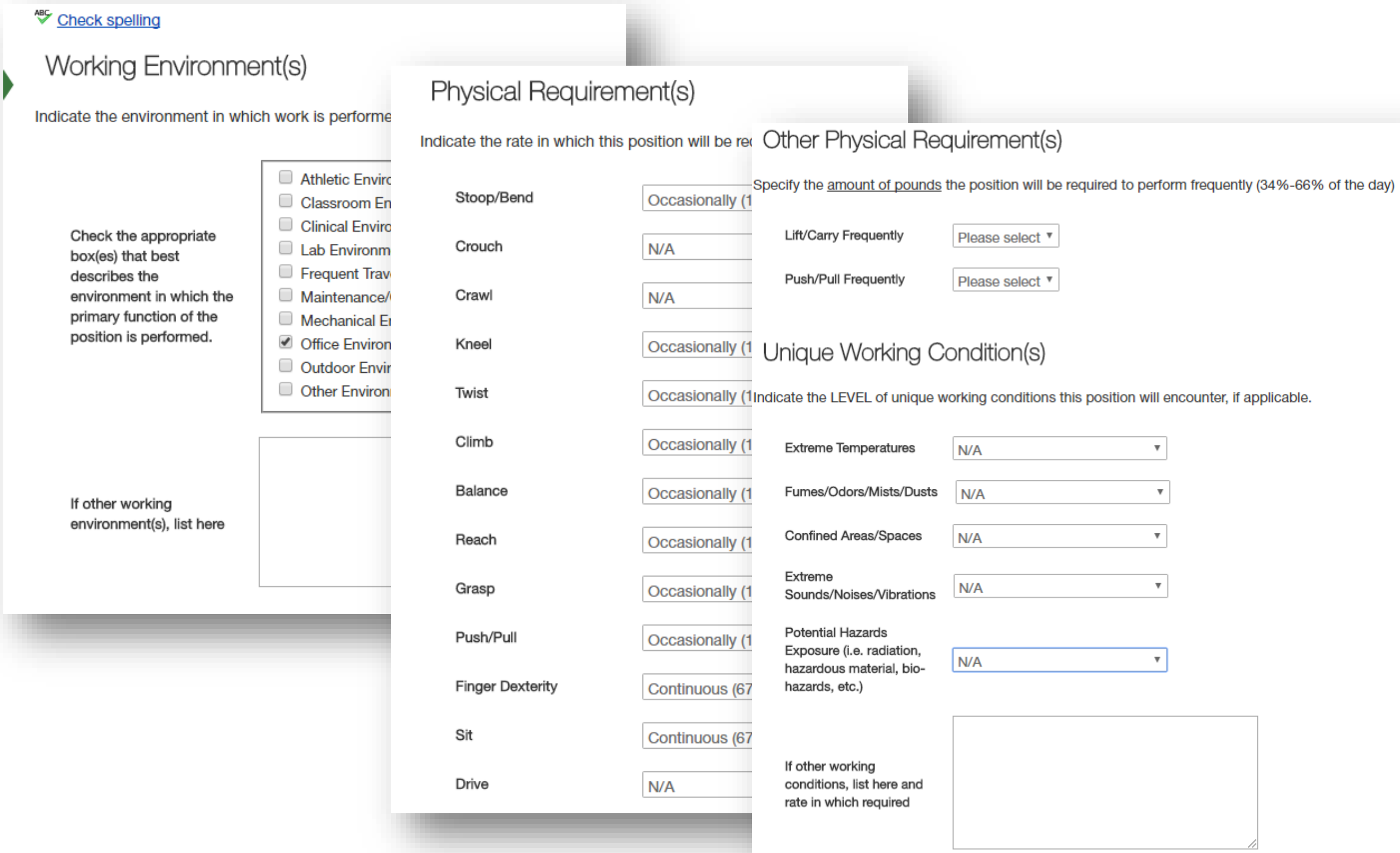
Need to remove a Budget Summary? Select the **Remove Entry?** button below the budget summary item to be removed and then click the **Save** button.



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

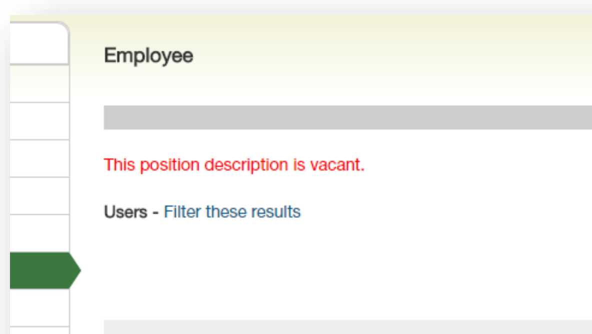
As needed, update fields so the position's working environment is accurately described.



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

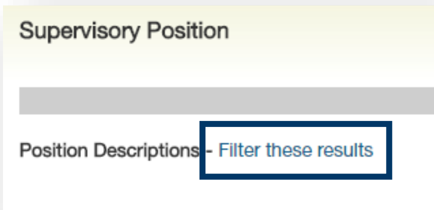
This section allows a user to select an employee name to connect to the position description. Even though this is an option, please **do not change** the employee that is connected to the position. If an employee needs to be directly placed into the position, Human Resources will complete the task of connecting the employee to the position.

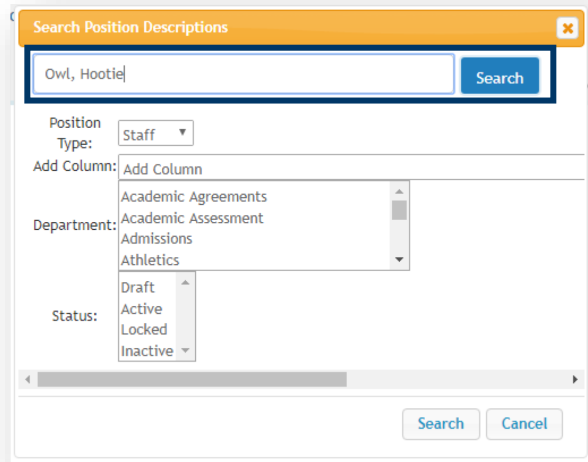


Supervisor Page

The next section is the **Supervisor** information.

To change the supervisor of the position, click **Filter these results** and search for the supervisor.



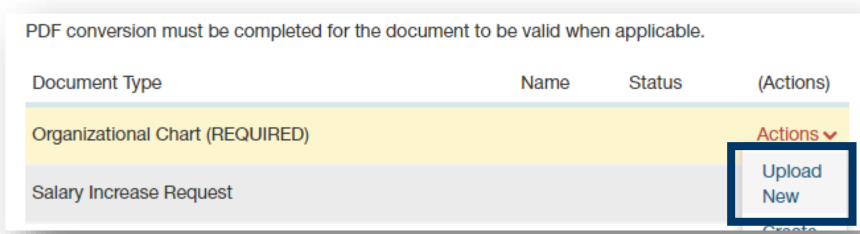


After you select the supervisor, click the **Next** button to advance to the next section of the position request.

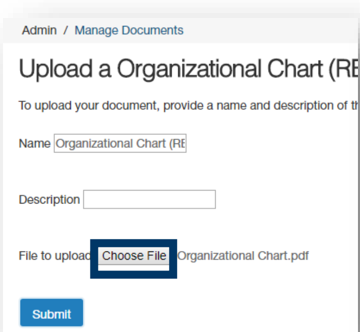
Position Documents Page

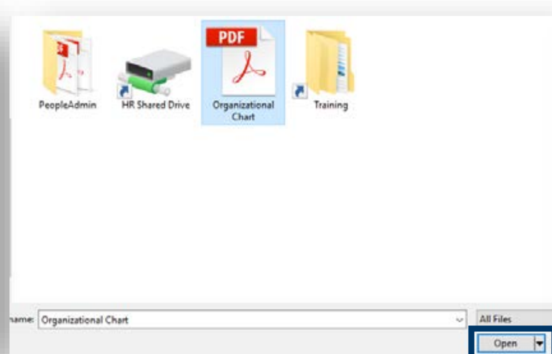
All staff position requests must have an **organizational chart** attached.

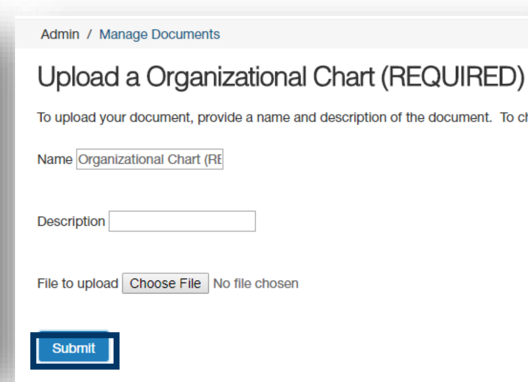
To attach an organizational chart, hover your cursor over the **Actions**ᵛ button. In the short list that appears, click on **Upload New**.



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





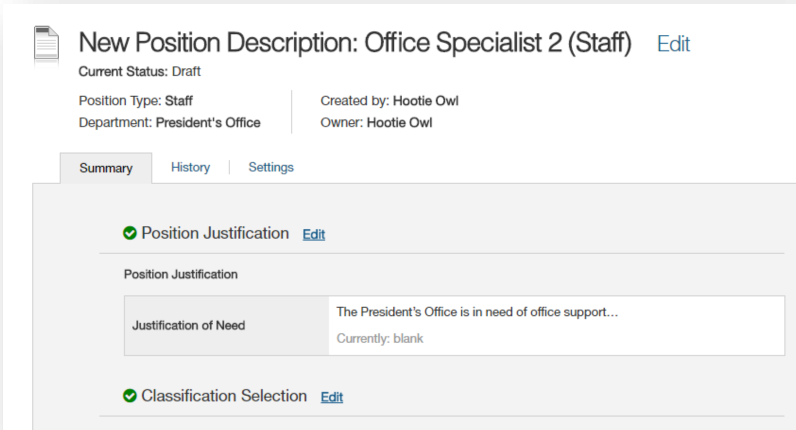


If you need to add additional documentation to the page for the position, hover your cursor over the applicable **Actions**ᵛ button(s) and complete the steps above.

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.

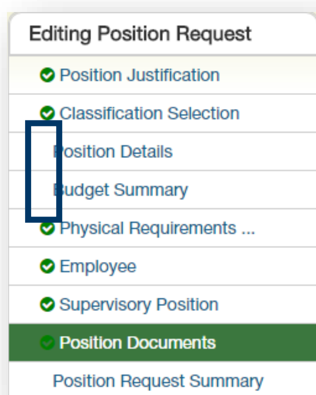
Summary Page

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.

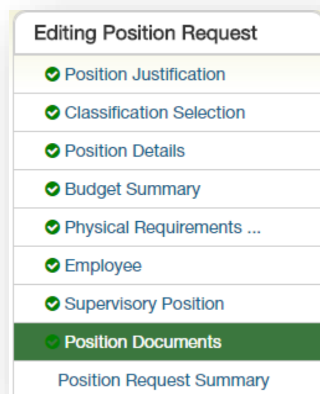


A position request is ready to submit when all of the pages in the page list on the left side of your screen have a check mark next to them.

Not Ready to Submit



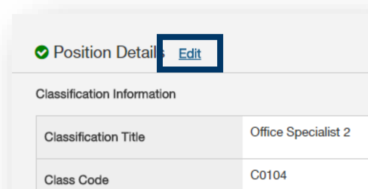
Ready to Submit



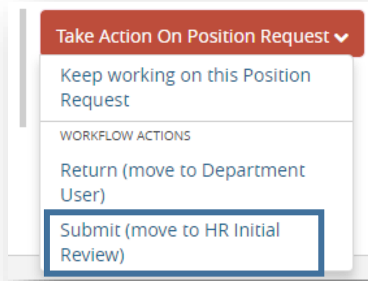
There are a couple options for reviewing:

- 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.

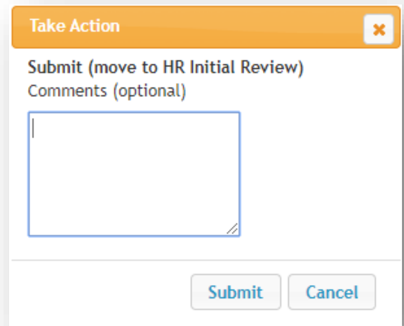


Once the position request is complete, navigate to the **Take Action On Position Request** button in the upper right corner of the screen and select **Submit (move to Dept. Head/Director)**.



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 or 541.885.1120).

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

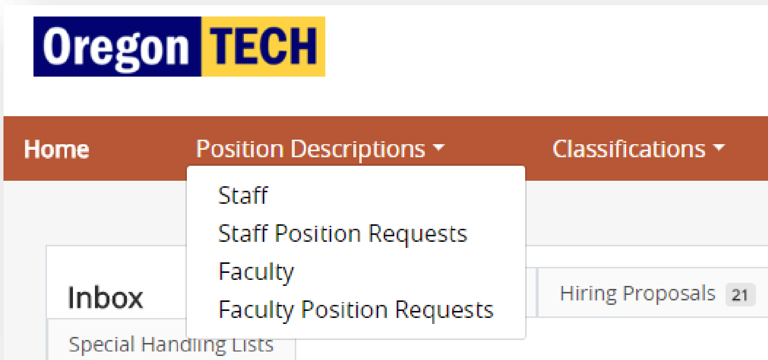
End of Section

Appendix I: Finding a Lost or Paused Position Request

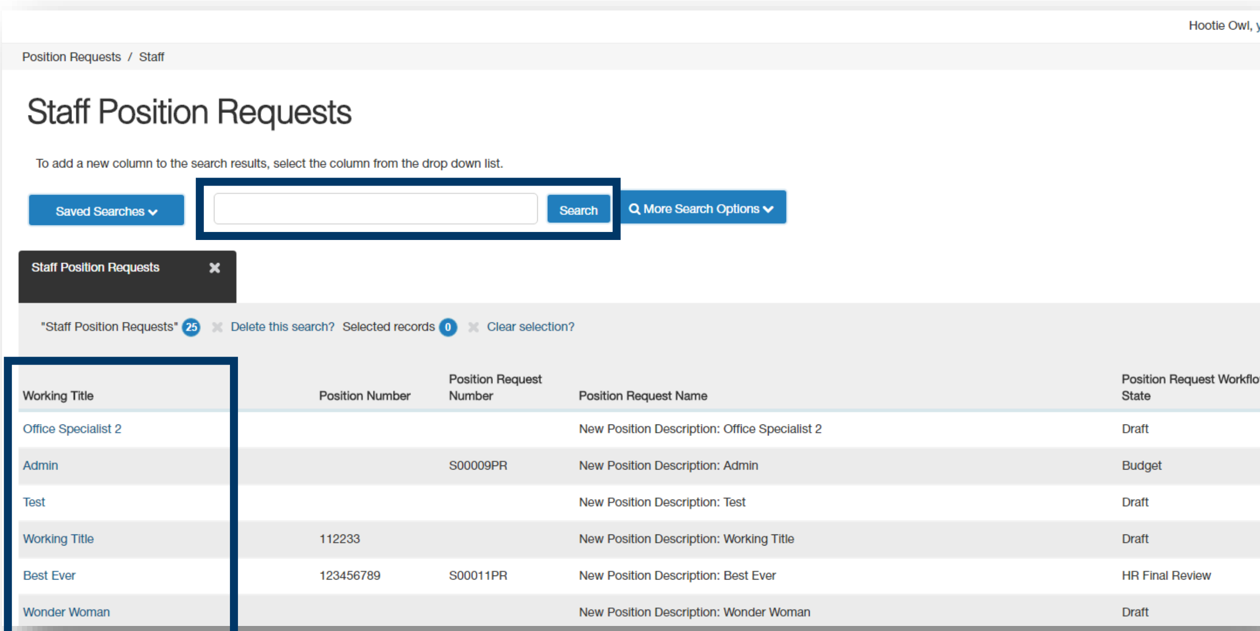
This section is to help you find a position request that you have accidentally navigated away from or to find a position request you needed to stop working on for a time.

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

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

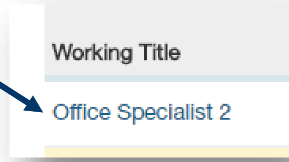


Find the position request by using the **Search** function or by scrolling through the list.

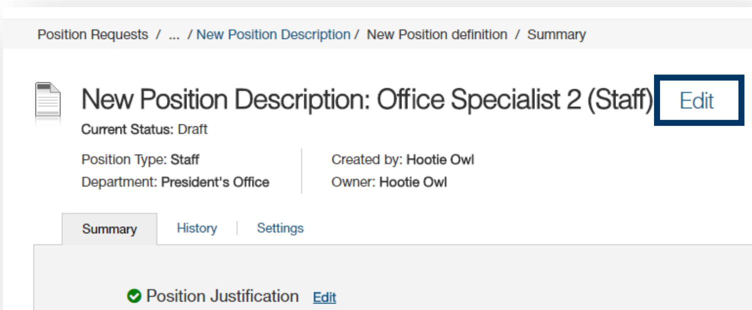


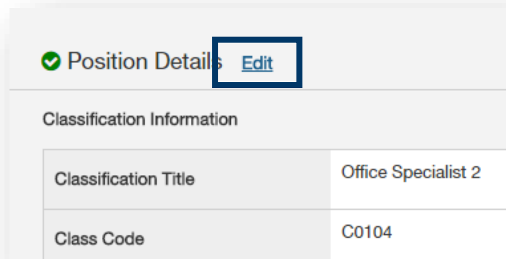
Before selecting the position, make sure to check the position request's **status** in the **Position Request Workflow State**. If the status is anything other than Draft or your queue, you may not be able to take action on the position request.

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 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