

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 <u>Human Resources Systems</u> 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 <u>TECHweb</u>.
- 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 <u>Human Resources Systems</u> 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.

lome					Shortcuts 🝷
Inbox Special Handling Lists	Postings S Hiring Proposals 2	Position Requests 1	Onboarding Tasks	My Links Applicant Portal User Guides	
SEARCH			Filters	Quick References Onboarding Candidate Experience	
			Filters	Candidate Experience	

It presents a dashboard that provides access to:

Summary views of your Inbox and Watch List.

e Inbox shows where items are in the orkflow.	Inbox Postings 🖪	Hiring Proposals 1	Position Requests	Onboarding Tasks	Special Handling Lists
	SEARCH				Filters
	TITLE		CURRENT STATE	DAYS IN CURR	ENT STATE
	Instructor Humanities and Social Sciences		Provost	39	
	Administrative Program Assis Dental Hygiene	tant	Provost	40	
	Dental Assistant 2 Dental Hygiene		Provost	40	
	Instructor Natural Science		Provost	34	
 Navigate between the three main Inbox tabs by clicking on the tab names. 	Inbox Postings	Hiring Proposals 1	Position Requests	Onboarding Tasks	Special Handling Lists
	тітіе		CURRENT STATE	DAYS IN CUR	RENT STATE

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

Posting s 🟮	Hiring Proposa s 2	Position Reques s 1	Onboarding Tasks
			Filters
	Posting <mark>s 5</mark>	Postint S Hiring Proposa s 2	Posting s Hiring Proposa s 2 Position Reques s 1

• 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.

Watch L	ist	Postings	Hiring Proposals	1 Position Requests 1
SEARCH				Unwatch Postings
	JOB TITLE	TYPE	CURRENT STATE	STATE OWNER
	Instructor Humanities and Social Sciences	Faculty	Provost	Provost

Alerts and Other Announcements

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

Home P	ostings ▼
Alerts (1 aler	rt from the administrator)
TYPE	MESSAGE
0	This is a test of the HEROES announcement system.
Inbox	Postings D Users 30 Hiring Proposals 18 Position Requests 32 Onboarding Tasks Special Handling Lists

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.

Positions Orego	n <mark>TECH</mark>			Welcome, Hootie Owl <u>N</u>	User Group: Dean/VP	u <u>t (hootie.owl)</u>
Home	Position Descriptions -	Classifications -			Shortcut	s -
Inbox	Postings 4 Hiring Proposals	1 Position Requests	Onboarding Tasks Special Hand	lling Lists Applicant		
SEARCH				User Guid Quick Ref	les	

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.

Orego	n <mark>TECH</mark>			U	ser Group:	•
Home	Postings 🔻	Hiring Proposals 🕶			Sł	nortcuts 👻
Inbox	Postings 4	Hiring Proposals 1 Position Requests C	Onboarding Tasks Special Handling Lists	My Links Applicant Po	ortal	
SEARCH			Filters	User Guides Quick Refere		

- **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.

regon TECH	MY TASKS	FILES
STAFF LIST	MY TASKS	
SUPER HOOTIE	Needs Attention Completed	
HOOTIE OWL	You have 5 tasks.	
	Type to start searching	
	Type to start searching ALL TASKS Bulk Actions: Bulk Action Selection	GO
		GO

Switching Between Modules

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

Oregon	TECH	Hire	-
Home	Postings -	PositionsOnboard	
		OTHER TOOLS	

<u>Roles</u>

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.

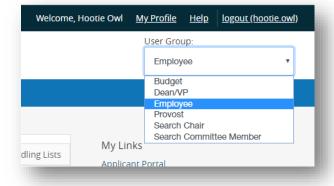
Role Definitions

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.

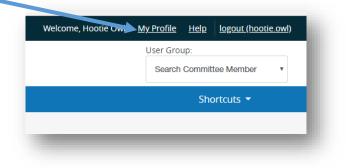
Your role list may be different than Hootie's in the screen shot above based on role(s) assigned to your position and your department(s).



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.



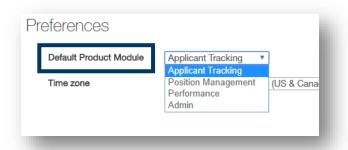
• Navigate to the Take Action On User button near the upper right corner and select Edit Profile OR click on Edit next to User Details in the tabbed section below the user information.

Take Action On User	Employee	<mark>Groups</mark> Budget
Manage System Emails	Supervisor: N/A Email: OregonTechHR@gmail.com Phone:	Dean/VF More
	Summary Manage Emails	
	OUser Details Edit	

- 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.

Employee Org Unit	Oregon Institute of Technology
Employee ID	
Employment Anniversary Date	Applicant Budget
Position Type	Dean/VP Department User
Reporting Org Unit	Dept. Head/Director Employee
Location	HR Admin Human Resources President
Default Module	Provost Search Chair
Preferred Group On Log In	Search Committee Member Department User

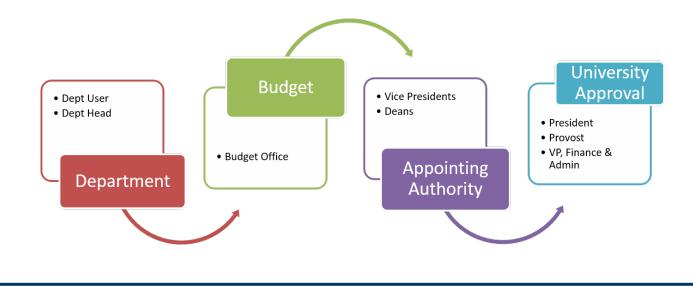
• Under Preferences, find **Default Product Module** and click on the dropdown to select the module you want to be automatically logged in to upon signing in.



• 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**.

Hire Orego	on <mark>TECH</mark>	••• Hire Thire	н
		Positions	
Home	Postings 👻	🕣 Onboard	
_	_	OTHER TOOLS	_

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

Click on **Position Descriptions** in the header

Orego	n TECH	
Home	Position Descriptions •	Classifications
	Staff	
	Staff Position Requests	
Inbox	Faculty Faculty Position Requests	Hiring Proposa
Special Ha	ndling Lists	

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.

			puons				
To ac	dd a new olumn to the searc	h results, select	the column fror	n the drop dow	vn list.		
s	aved Searci əs 🗸					Search	Q More Search Options 🗸
		_					
Staff I	Positions						
"Sta	ff Positions" 1 elected re	cords 🕕 💥 C	lear selection?				Actions 🗸
"Sta	ff Positions" 🚺 velected re	cords 🕕 🗶 C	Clear selection?				Actions ~ (Actions)
"Sta	ff Positions" ① Lelected re Working Title	cords 0 🗶 C Position Number	Clear selection? Employee Last Name	Employee	Department	Superv	(Actions)

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

Sta	aff Position	Descri	ptions	6			
To ac	id a new column to the sea	rch results, select	the column from	m the drop do	wn list.		
s	aved Searches 🗸					earch Q More Se	arch Options 🗸
Staff	Positions	×					
Staff	Positions	×					
			Clear selection?				Actions 🗸
			Clear seler aon?				Actions ~ (Actions)
			Clear selection? Employee Last Name	Employee First Name	Department	Supervisor	

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

Position Descriptions / Staff / Operating System/Network Analyst	Employee . agar
	Print Preview (Employee View) ➡ Print Preview
Position Description: Operating System	/Network Analyst (Staff)

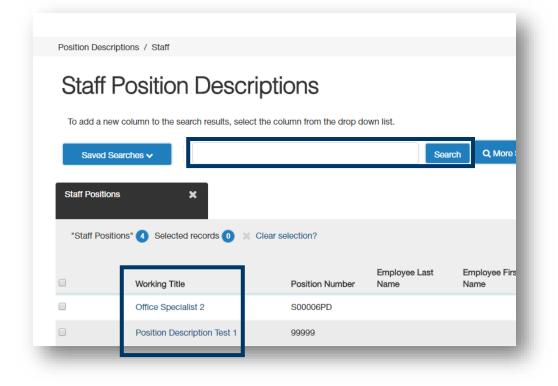
Modifying a Position Description

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

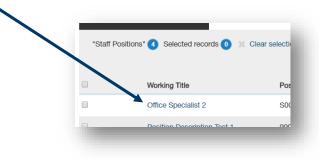
Click on **Position Descriptions** and select **Staff** or **Faculty**, whichever is the position type for the position you need to modify.

Home	Position Descriptions -	Classifications •
	Staff	
	Staff Position Requests	
	Faculty	Living Dropogals
Inbox	Faculty Position Requests	Hiring Proposals 21

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



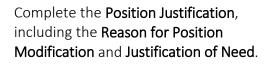
Click on the **Working Title** link to open the position description.



In the upper right corner, click on the \star Modify Position Description button.

Then click on the Start button in the next screen.	Position Descriptions / Staff / Modify Position Description
	Start Modify Position Description Position Request on Office Specialist 2? Once it has been started, this position request will lock the position description from other updates until the position request has completed.

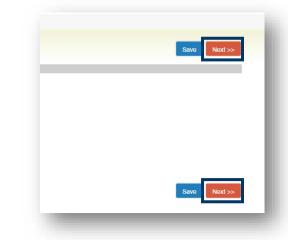
The position title in the next screen will depend on the position description being modified.



* Required Information Position Justifica	tion
Reason for Position Modification	Fill Vacancy
	Employee has resigned as of September 15, 2018.
 Justification of Need 	
	This field is required.

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.



Print Preview (Employee View)

Modify Position Description

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.

diting Position Request	Classification Selection
Position Justification	
Classification Selection	
Position Details	Classifications - Filter these results
Budget Summary	
Physical Requirements	
Employee	
Supervisory Position	"Staff Classifications" 3 Selected records 0 💥 Clear selection?
Position Documents	
Position Request Summary	Classification Title
	ADMINISTRATIVE PROGRAM SPECIALIST
	O INFORMATION TECHNOLOGY CONSULTANT
	Office Specialist 2

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

on Request	Classification Selection	
stification		
on Selection		
tails	Classifications Filter these results	
nmary		
quirements		

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.

st	Position Details	
	Check spelling	
	Classification Info	mation
	Classification Title	Office Specialist 2
	Class Code	C0104
	Job Family	
ary	Position Type	Classified
	Pay Range	
	Min Salary	\$2,383
	Mid Salary	\$2,921
	Max Salary	\$3,458
		The Office Specialist 2 performs a wide range of office support, technical, and/or minor adminis
	Classification Summary	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
		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 <u>https://jobs.oit.edu/</u>.

Position Information	on
* Working Title	TEST Administrative Assistant
Position Number	
College/Division	Finance and Administration
Department	Finance and Administration
Hiring Unit	Please select *
* Work Location	Please select T 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.

Additional * Requirements	This field is required.	
Preferred Qualifications		

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

- This section is NOT required for faculty positions.
- For staff position:
 - o At least three sections are required.
 - o Should have 5-7 sections as a best practice.
 - Must have an Other Duties as Assigned section at 5-10% that is noted as nonessential.
- 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. Job Function (Optional): The job function is an optional field and can be used to describe "Administrative Support".

Job Function	Reception
Description of Job Function	Welcomes visitors by greeting them, in person or on the telephone; answering or referring inquiries. Directs visitors by maintaining employee and department directories; giving instructions. Maintains security by following procedures; monitoring logbook; issuing visitor passes.
Essential	Yes *
Percentage Of Time	55 Enter a number with a maximum of 3 digits.
Remove Entry?	
Add Job Duties Entry	

Description of Job Function	
Essential	No *
Percentage Of Time	15 Enter a number with a maximum of 3 digits.
Remove Entry?	
Add Job Duties Entry	

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.

	Budget Summary
	Add Budget Summary Entry
	Budget Information
ary	Budget Information Maximum Amount Currently Budgeted for Position

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.

Budget Summary

Index	OIT123
Fund	000000
Org	111111
Account	10102
Amount	50,000
Prog	333333
Remove Entry?	

Prog	333333	
Remove Entry?		
Add Dudget Cummers Fe		

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.

^{A®} ⊂ <u>Check spelling</u>					
Working Environme		Physical Requir	ement(s)		
		Indicate the rate in which t	this position will be rei	Other Physical Rec	quirement(s)
	Athletic Enviro Classroom En	Stoop/Bend	Sp Occasionally (1	ecify the <u>amount of pounds</u>	the position will be required to perform frequently (34%-66% of the day)
Check the appropriate box(es) that best	Clinical Enviro	Crouch	N/A	Lift/Carry Frequently	Please select *
describes the environment in which the primary function of the	 Frequent Trav Maintenance/ Mechanical Er 	Crawl	N/A	Push/Pull Frequently	Please select *
position is performed.	Office Environ Outdoor Envir	Kneel	Occasionally (1	Jnique Working C	ondition(s)
	Other Environ	Twist	Occasionally (1Ind	licate the LEVEL of unique w	vorking conditions this position will encounter, if applicable.
		Climb	Occasionally (1	Extreme Temperatures	N/A *
If other working		Balance	Occasionally (1	Fumes/Odors/Mists/Dusts	N/A Y
environment(s), list here		Reach	Occasionally (1	Confined Areas/Spaces	N/A •
		Grasp	Occasionally (1	Extreme Sounds/Noises/Vibrations	N/A *
		Push/Pull	Occasionally (1	Potential Hazards Exposure (i.e. radiation, hazardous material, bio-	N/A T
		Finger Dexterity	Continuous (67	hazardous materiai, bio- hazards, etc.)	
		Sit	Continuous (67	If other working	
		Drive	N/A	conditions, list here and rate in which required	

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.

Employee
 This position description is vacant.
 Users - Filter these results

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.

Supervisory Position	l
Position Descriptions - Filter these results	l
	J

Owl, Hooti	el	Se	earch J
Position Type:	Staff 🔻		
Add Column:	Add Column		
Department:	Academic Agreements Academic Assessment Admissions Athletics	•	
Status:	Draft Active Locked Inactive Y		
			÷.
		Search	Cancel

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

Position Documents Page

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

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

DF conversion must be completed for the doc	ument to be valid whe	n applicable.	
Document Type	Name	Status	(Actions)
Organizational Chart (REQUIRED)			Actions 🗸
Salary Increase Request			Upload New

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

Admin / Manage Documents	PDF	Admin / Manage Documents
Upload a Organizational Chart (RE	1 🔊 🔊 🕹 📩	Upload a Organizational Chart (REQUIRED)
To upload your document, provide a name and description of the	PeopleAdmin HR Shared Drive Organizational Training	To upload your document, provide a name and description of the document. To ch
Name Organizational Chart (Rt		Name Organizational Chart (RE
Description		
File to upload Choose File Organizational Chart.pdf		Description
rile to upload Choose rile Organizational Chart.put		File to upload Choose File No file chosen
Submit	vame: Organizational Chart ~ All Files	
	Open 🔻	Submit

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

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

Summary Page

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

	on Type: Staff rtment: President's Office	Created by: Hootie Owl Owner: Hootie Owl			
Summ	Summary History Settings				
	Position Justification	Edit			
	Position Justification				
Justification of Need		The President's Office is in need of office support			
Justification of Need Currently: blank					

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	<u>Ready to Submit</u>
Editing Position Request	Editing Position Request
Position Justification	Position Justification
Classification Selection	Classification Selection
losition Details	Position Details
ludget Summary	Budget Summary
Physical Requirements	Physical Requirements
Employee	Employee
Supervisory Position	Supervisory Position
Position Documents	Position Documents
Position Request Summary	Position Request Summary

There are a couple options for reviewing:

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

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

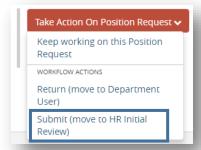
New Position Description: Office Specialist 2 (Staff) Edit Current Status: Draft
Desition Turpe: Staff Created by: Heatin Oud

Position Detail Edit	
Classification Information	
Classification Title	Office Specialist 2
Class Code	C0104

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 (<u>oithr@oit.edu</u> 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.

Oregon TECH					
Home	Position Descriptions -	Classifications -			
	Staff Staff Position Requests				
Inbox	Faculty Faculty Position Requests	Hiring Proposals 21			
Special Ha	ndling Lists)			

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

Position Requests / Staff				
Staff Position	Requests			
To add a new column to the search results, select the column from the drop down list.				
Saved Searches V Search Q More Search Options V				
Staff Position Requests				
"Staff Position Requests" 25	Delete this search? Selected record	is 🧿 💥 Clear selectio	on?	
	Delete this search? Selected record Position Number	s 💿 💥 Clear selectio Position Request Number	Position Request Name	Position Request Workflov State
orking Title	1	Position Request		
orking Title ffice Specialist 2	1	Position Request	Position Request Name	State
orking Title ffice Specialist 2 dmin	1	Position Request Number	Position Request Name New Position Description: Office Specialist 2	State
forking Title ffice Specialist 2 dmin	1	Position Request Number	Position Request Name New Position Description: Office Specialist 2 New Position Description: Admin	State Draft Budget
"Staff Position Requests" (2) Working Title drinin est Working Title est Ever	Position Number	Position Request Number	Position Request Name New Position Description: Office Specialist 2 New Position Description: Admin New Position Description: Test	State Draft Budget Draft

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.

New Position Description: Office Specialist 2 (Staff)	Position Details Edi	<u>t</u>
Current Status: Draft	Classification Information	
Position Type: Staff Created by: Hootie Owl		
Department: President's Office Owner: Hootie Owl	Classification Title	Office Specialist 2
Summary History Settings		
	Class Code	C0104

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

End of Section

Appendix II: Contact & Support Information

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