USER GUIDE

PEOPLEADMIN APPLICANT TRACKING SYSTEM

NON-FACULTY & TES POSITIONS

Please note: This User Guide is subject to change, and will be updated as new PeopleAdmin modules are added and as changes are made to the system or processes. The most current version can be found here: aub.ie/pa7

- Intro to PeopleAdmin7 ATS
- Getting Started/Logging into System
- User Accounts
- Welcome Page
- Creating a Non-Faculty Posting
- Reviewing Applications
- Changing Applicant Status
- Requesting References
- Creating a Hiring Non-Faculty Hiring Proposal
- Routing a Non-Faculty Hiring Proposal
- Generating and Submitting an Offer Letter
- Adding New Hire Documents to Non-Faculty Hiring Proposal
- Creating a TES Posting
- Creating a TES Hiring Proposal
- Email Notifications
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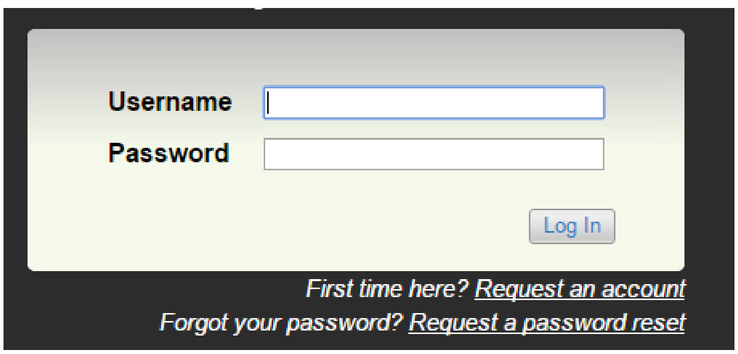
INTRODUCTION TO APPLICANT TRACKING

The Applicant Tracking Module will serve to:

- Post positions
- Accept applications
- Facilitate the pre-employment process
- Hire applicants into positions
- Collect new hire paperwork

GETTING STARTED

To log in to the PA7 Applicant Tracking Module for Non-Faculty & TES positions, navigate to www.auemployment.com/hr using your web browser.



- If an user account was created for you, please use your username and password to login. If this is your first time logging in, please use the username and password provided to you.

- If you need to request a user account, please select the **Request an Account** link and complete the form. A member of the Employment Services team will review your account, and you will be contacted upon approval with information on how to access your account.

USER GROUPS

User Groups are determined by each division's Human Resources Liaison and the Central Human Resources Department. When accounts are requested, the requester may select the appropriate user group. The Employment Services team will review the user group requested to confirm the accuracy of the request.

Access to functions in the system is determined by the user group's scope:

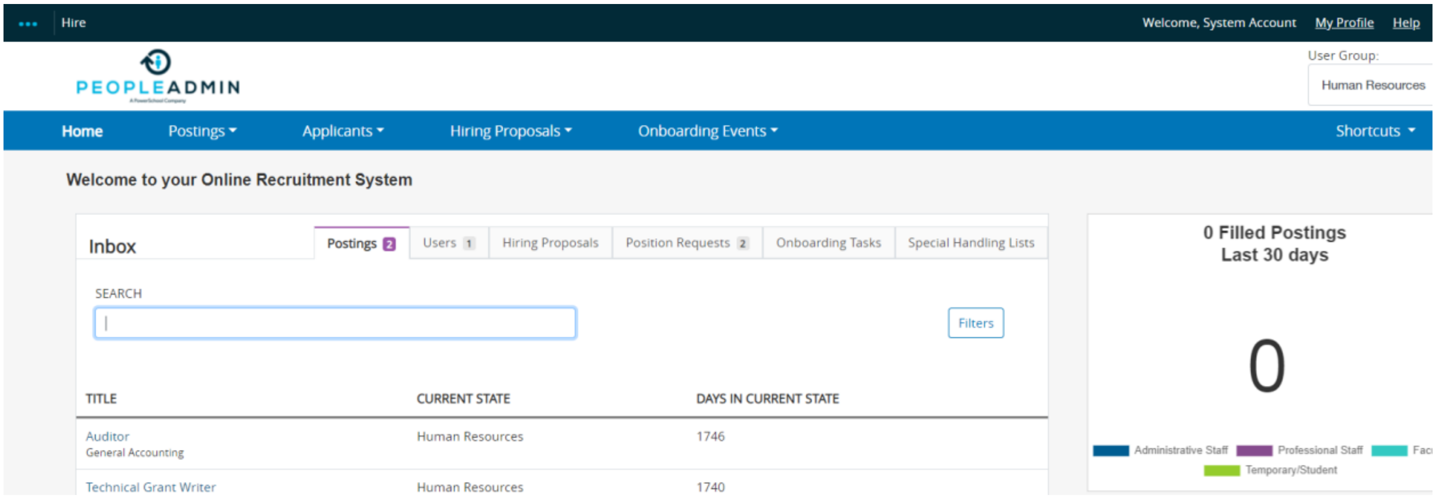
Department Scope - access to individual department(s)
Division Scope - access to all departments in a division
Organization Scope - access to all divisions and departments
Individual Scope - individual access or notification determined by "tagging" user on a form

Below is a list of all User Groups and their scope:

- **Initiator** - Department Scope
- **Human Resources Liaison** (HRL) - Division Scope
- **Approving Supervisor** (receives notification email only) - Individual Scope
- **OIT -** Individual Scope
- **AA/EEO** - Organization Scope
- **Compensation** - Organization Scope
- **OIP -** Organization Scope
- **Research Security** - Organization Scope
- **Employment -** Organization Scope
- **Executive Director of Compensation** - Organization Scope
- **Temporary Employment Services (TES) -** Organization Scope

WELCOME PAGE

After logging in, users will be directed to the Welcome Page.



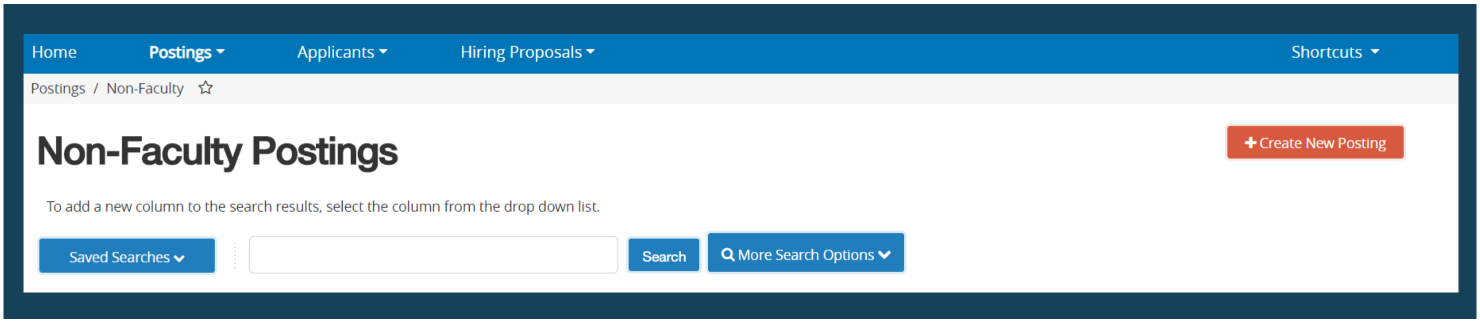
Features of the Welcome Page:

- **Inbox**: Pending postings and hiring proposals for review
- **Watchlist**: Postings and hiring proposals reviewed by users can be added to the user's Watchlist.
- **Shortcuts**: Shortcuts to custom searches for postings and hiring proposals can be created.

CREATING A NON-FACULTY POSTING

Hover over the Postings link at the top of the Welcome Page and select **Non-Faculty.**

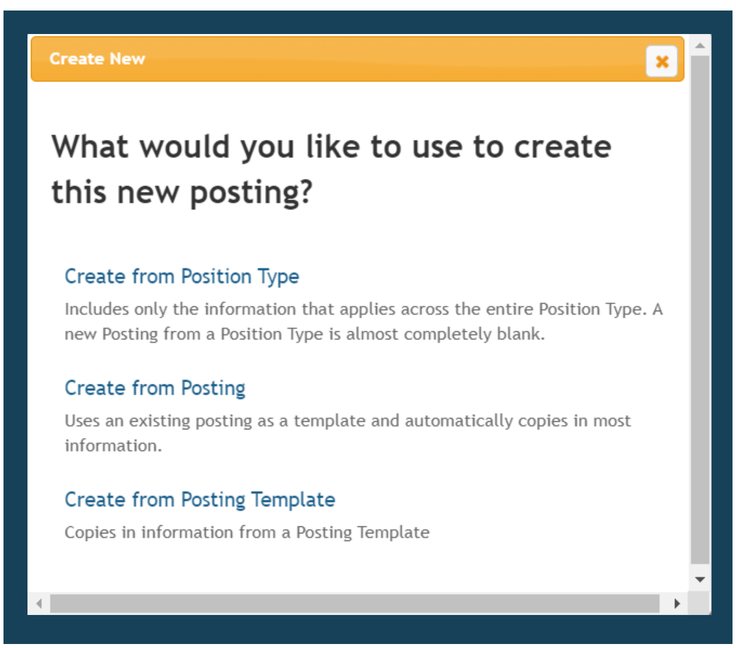
Select **Create New Posting**. There are a few options for creating postings.



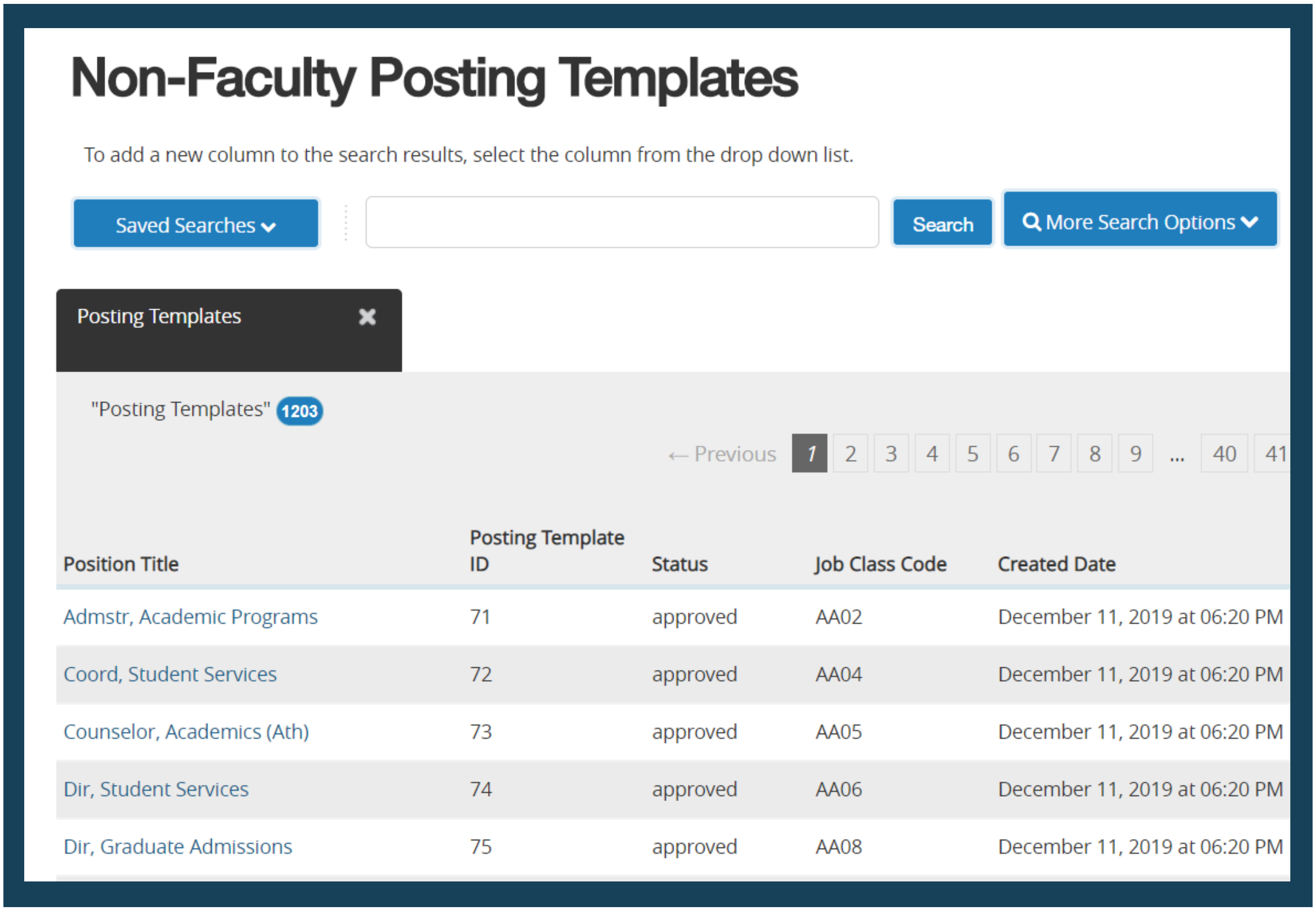
Create from Position Type: This option will provide a completely blank form to create a posting. This is not recommended.

Create from Posting: This option will allow users to duplicate an existing posting.

Create from Posting Template: (Recommended) This will allow users to select the position by job code and will populate most position information.

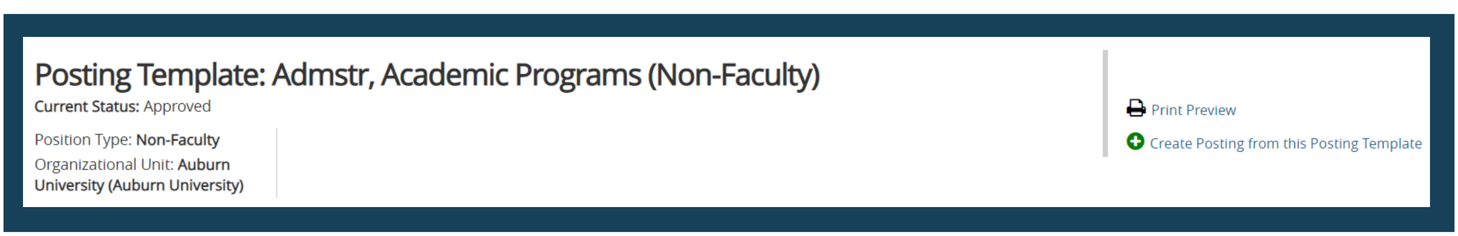


Select the position title of the position to be posted.

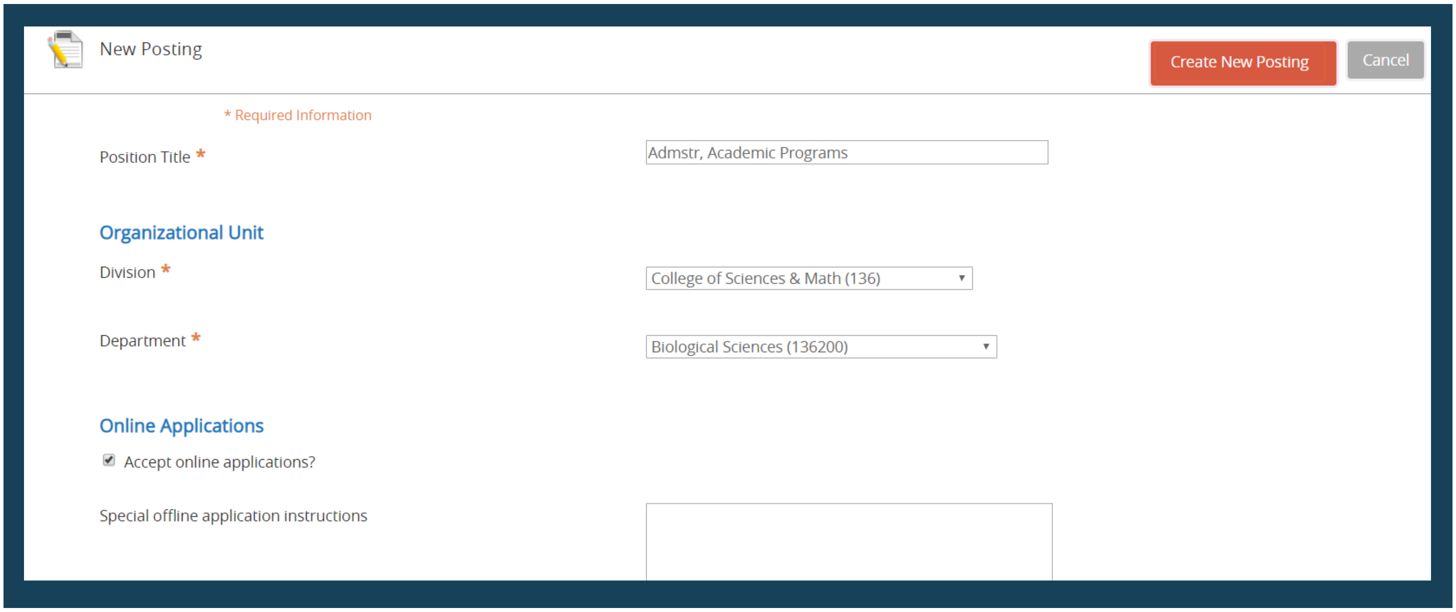


Position Title	Posting Template ID	Status	Job Class Code	Created Date
Admstr, Academic Programs	71	approved	AA02	December 11, 2019 at 06:20 PM
Coord, Student Services	72	approved	AA04	December 11, 2019 at 06:20 PM
Counselor, Academics (Ath)	73	approved	AA05	December 11, 2019 at 06:20 PM
Dir, Student Services	74	approved	AA06	December 11, 2019 at 06:20 PM
Dir, Graduate Admissions	75	approved	AA08	December 11, 2019 at 06:20 PM

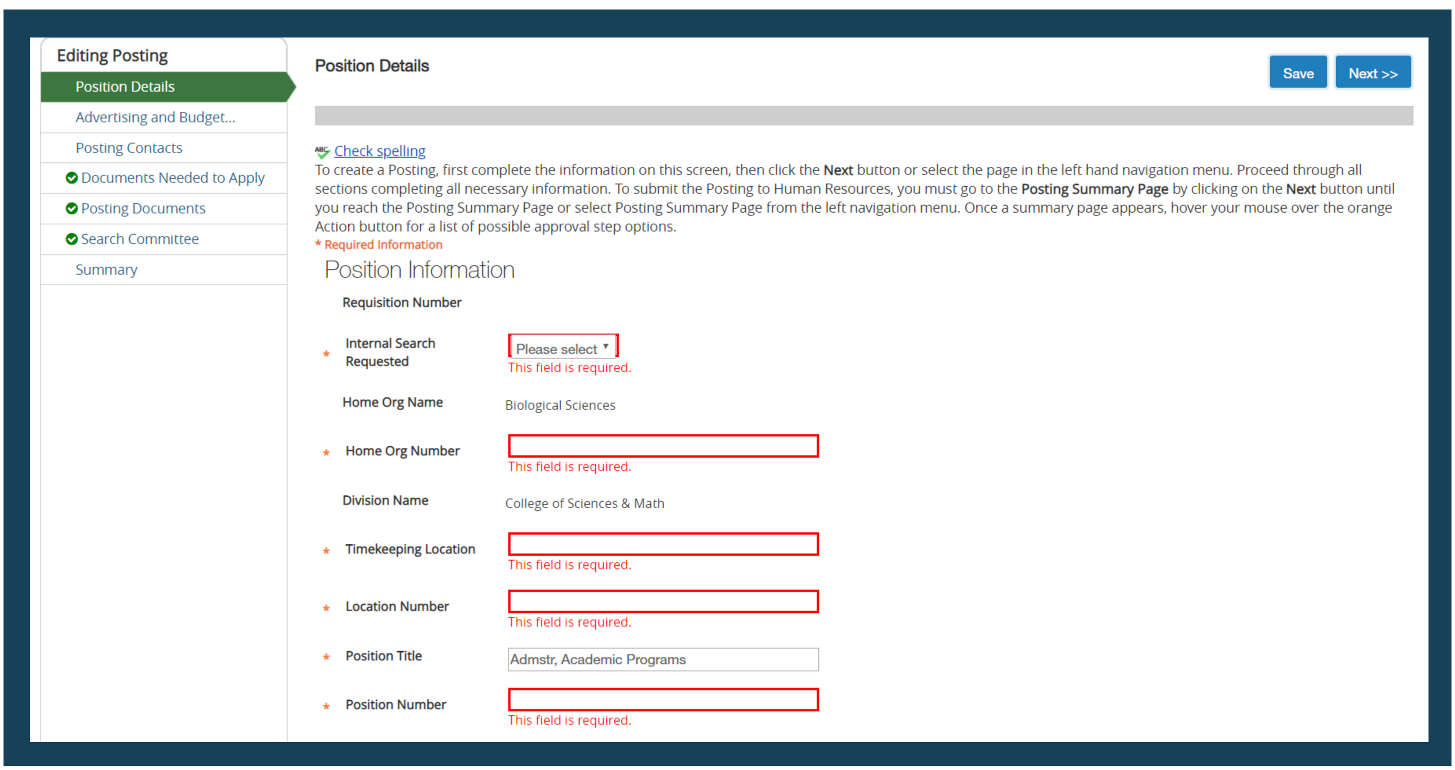
Select **Create Posting from this Posting Template.**



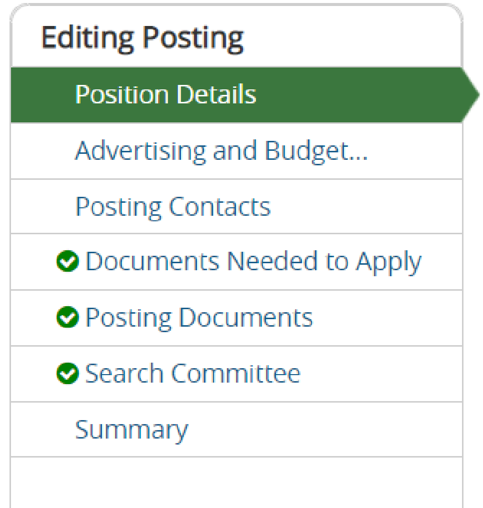
Select the appropriate Division and Department and select **Create New Posting**.



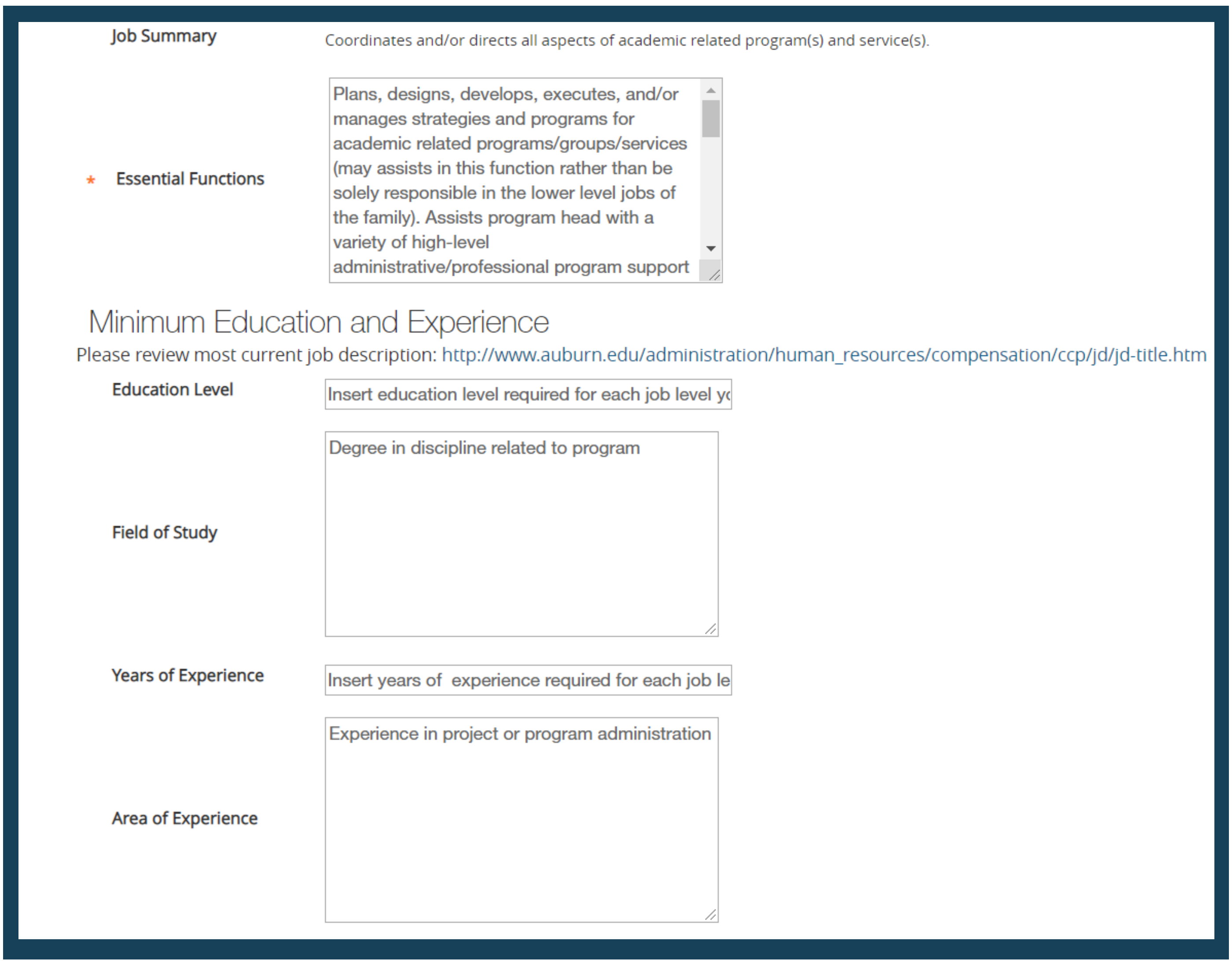
There will be a number of required fields to complete. These fields will be notated by an asterisk and red outline. The form may not be submitted until these fields are completed.



You can navigate through the pages of the posting form using the sidebar menu or the Next button. You can save your changes by selecting the Save or the Next button on each page of the form.



The Job Summary, Essential Functions and Minimum Education/Experience will populate from the posting template. Users may customize Job Summary and Essential Functions in order to fully describe the specific role. For Job Family postings, please enter the Minimum Education/Experience for the lowest level to be posted.



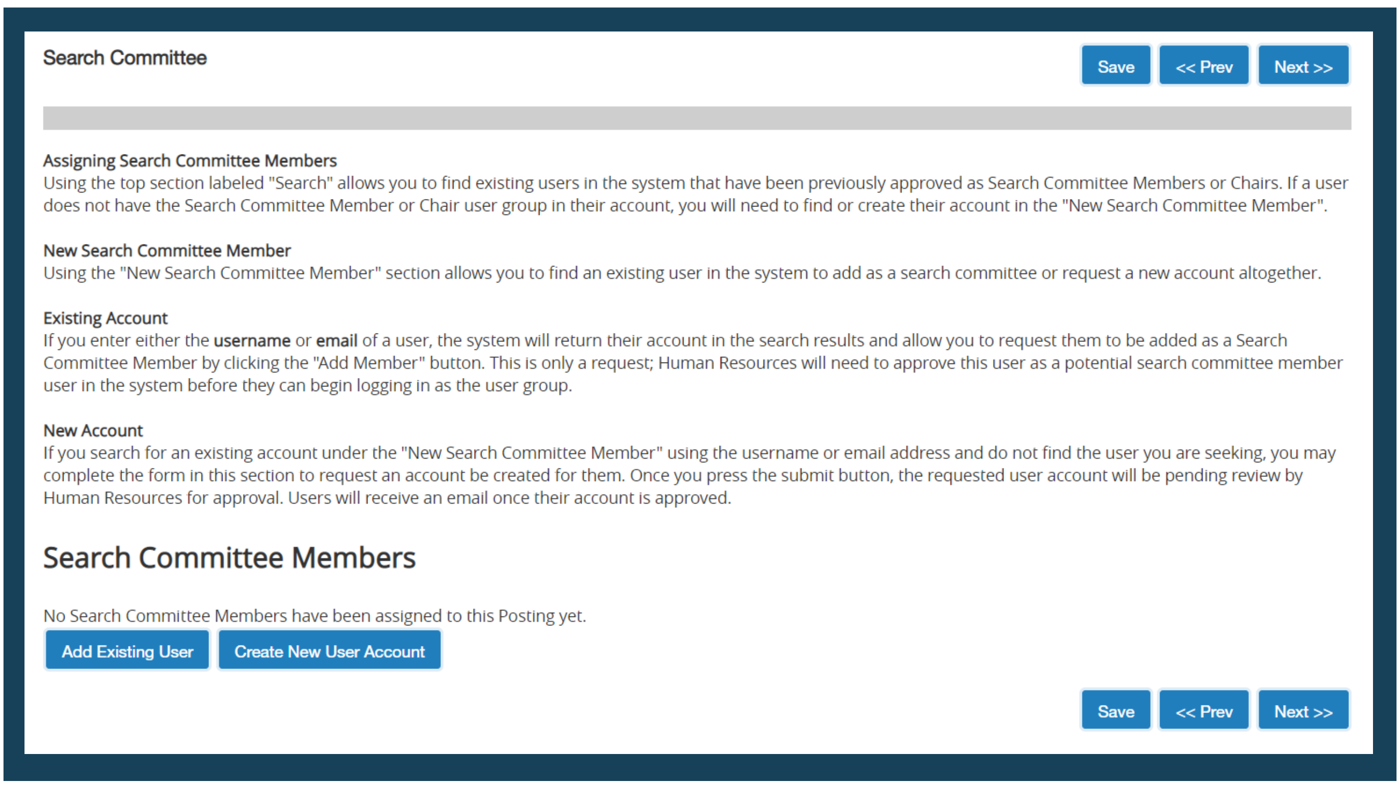
- Complete all required fields on the Posting Details, Advertising & Budget Details and Posting Contacts pages. To progress to each page, use the Next button, or navigate using the sidebar menu.

- On the page labeled Documents Needed to Apply, users will identify the documents they will require applicants to attach to their applications.

- On the page labeled Posting Documents, users may add any documents related to the posting or position - this is not required.

ASSIGNING SEARCH COMMITTEE ROLES

On the Search Committee page of the posting form, users have the ability to create a search committee and assign a Search Chair.



Search Committee

Save | << Prev | Next >>

Assigning Search Committee Members
Using the top section labeled "Search" allows you to find existing users in the system that have been previously approved as Search Committee Members or Chairs. If a user does not have the Search Committee Member or Chair user group in their account, you will need to find or create their account in the "New Search Committee Member".

New Search Committee Member
Using the "New Search Committee Member" section allows you to find an existing user in the system to add as a search committee or request a new account altogether.

Existing Account
If you enter either the **username** or **email** of a user, the system will return their account in the search results and allow you to request them to be added as a Search Committee Member by clicking the "Add Member" button. This is only a request; Human Resources will need to approve this user as a potential search committee member user in the system before they can begin logging in as the user group.

New Account
If you search for an existing account under the "New Search Committee Member" using the username or email address and do not find the user you are seeking, you may complete the form in this section to request an account be created for them. Once you press the submit button, the requested user account will be pending review by Human Resources for approval. Users will receive an email once their account is approved.

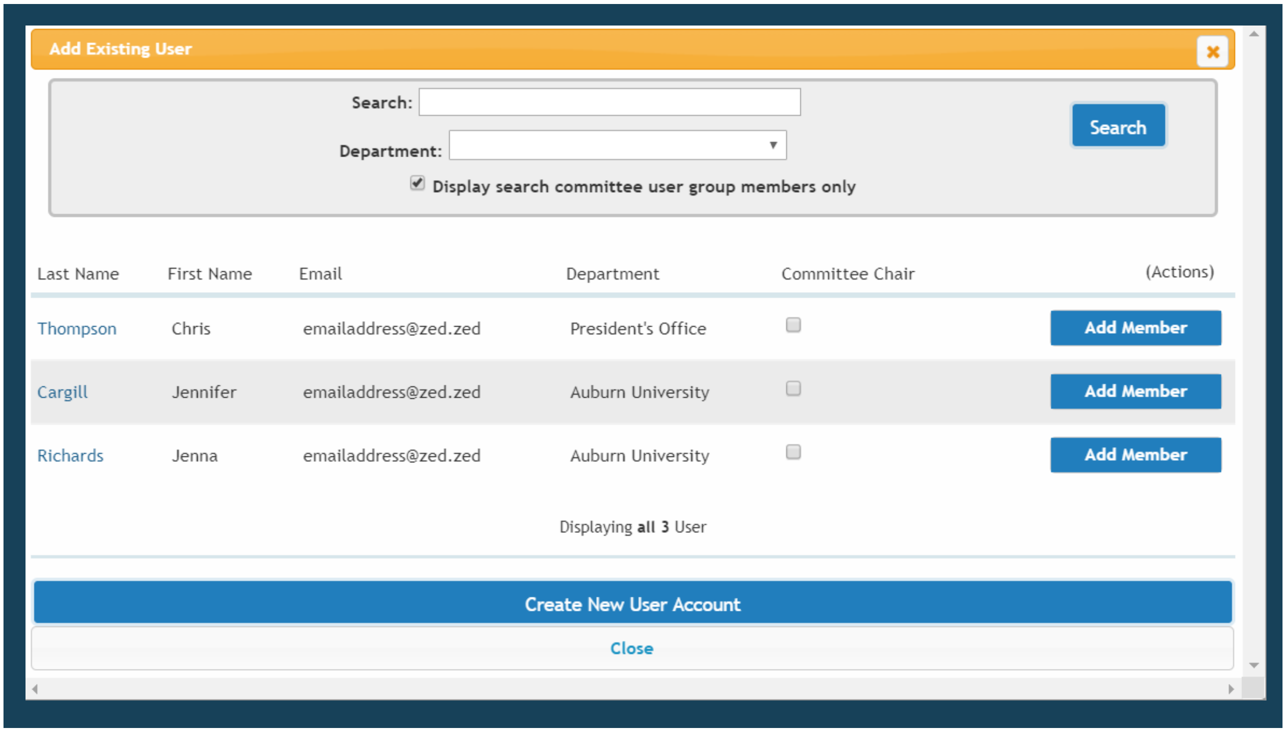
Search Committee Members

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

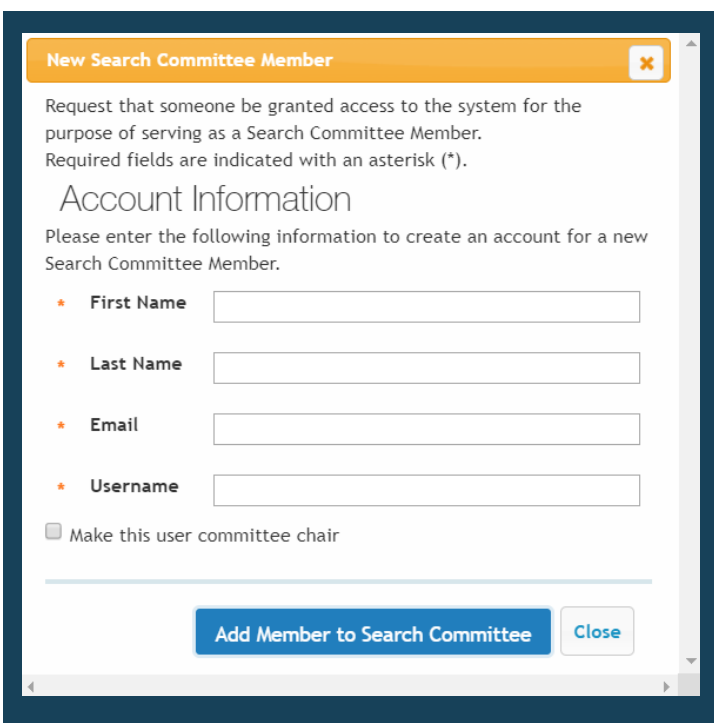
Add Existing User | Create New User Account

Save | << Prev | Next >>

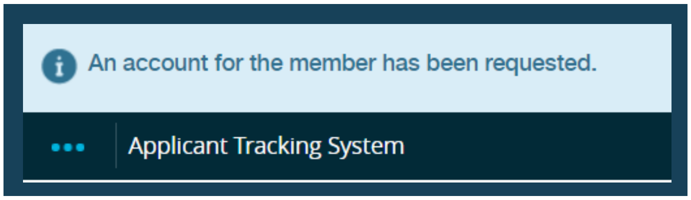
To add individuals to the search committee, select **Add Existing User**.



Search for the employee by name. Select **Add Member** to add them to the search committee. Check the box for **Committee Chair** if appropriate. If they don't already have an account in PA7, select **Create New User Account**.



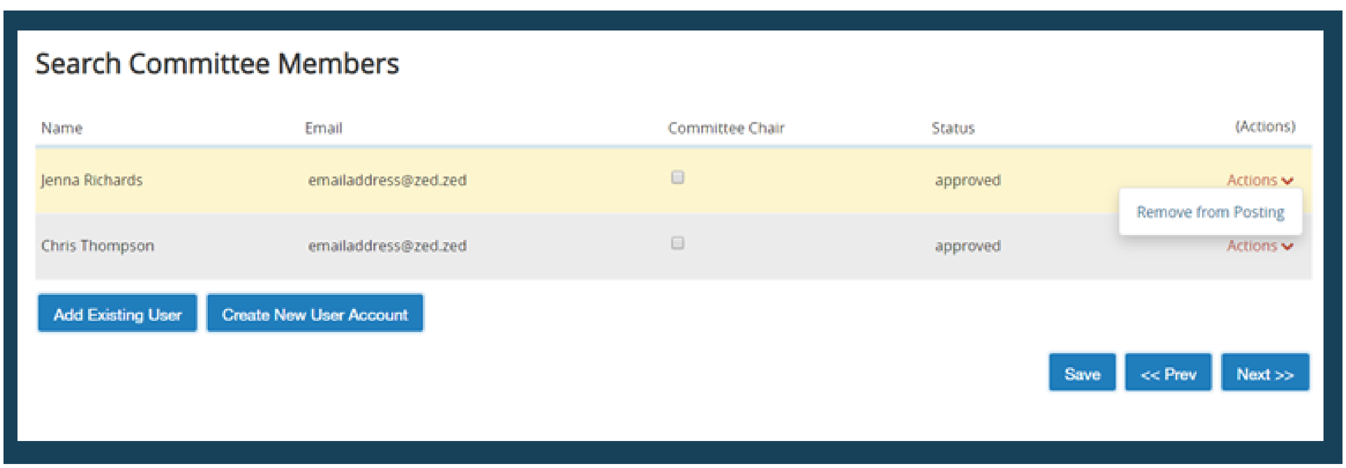
Complete all the required fields and select **Add Member to Search Committee**. It is recommend to use the employee's AU email address and username (email prefix) for those corresponding fields.



Users will receive a banner at the top of the screen confirming the new account has been requested. A member of the Employment Services team will approve the account.

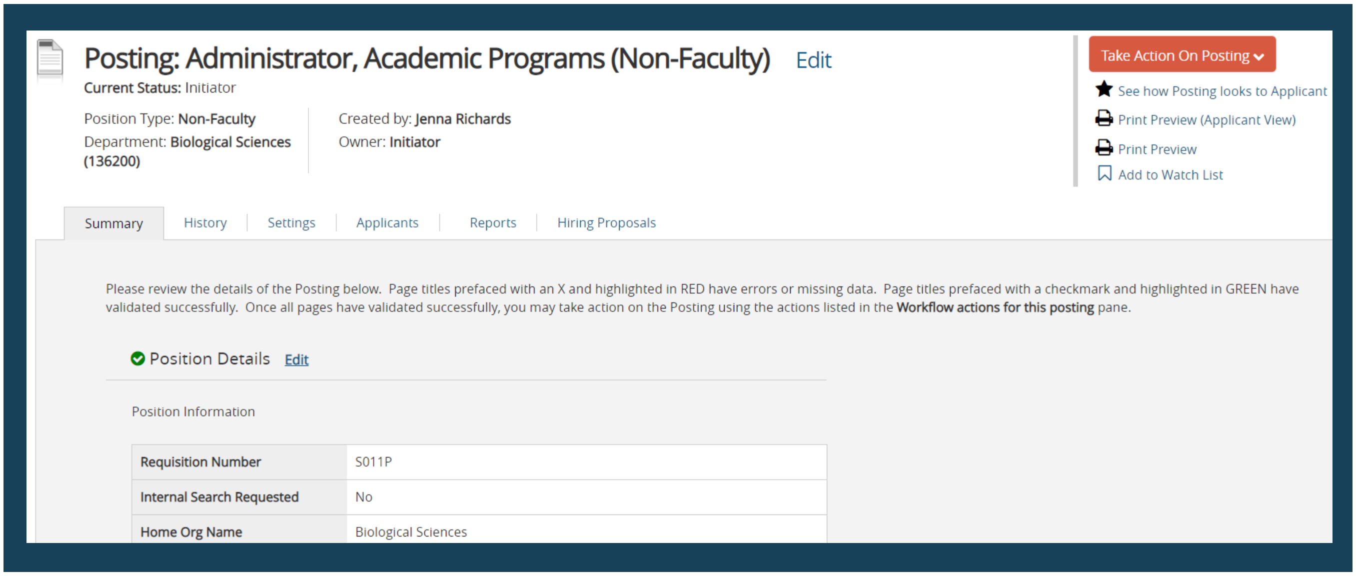
Search committee members and committee chairs will receive email notifications.

To remove committee members, hover over the **Actions** link and select **Remove from posting**.



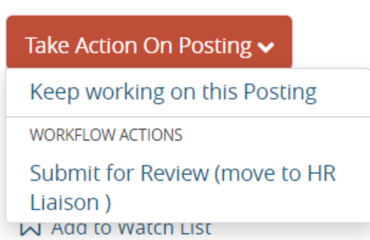
SUMMARY PAGE AND SUBMITTING POSTING FOR REVIEW

The last page of the posting form is the Summary page. This will provide users with a one page view of all pages of the posting form. Ensure each section has a green check mark - this means the section is complete. Orange check marks indicate that the page has required fields that must be completed.



When users are ready to submit the posting for review, hover over the orange button that says **Take Action on Posting**.

Initiator View:

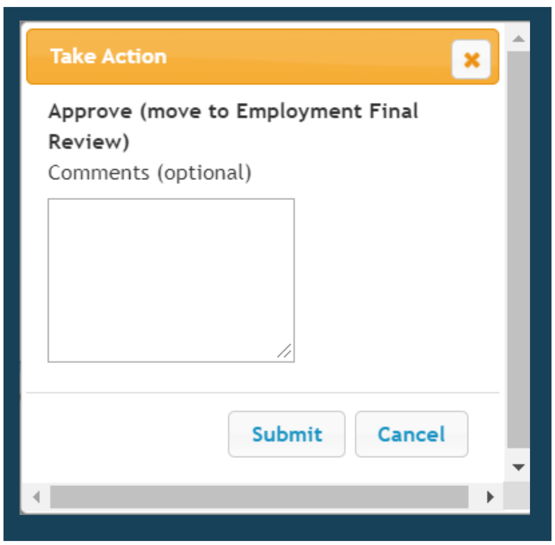


HR Liaison View:

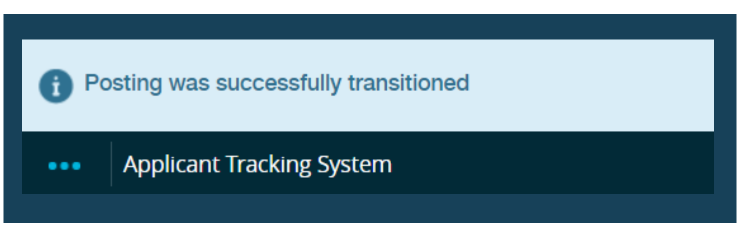
Users who have created postings as an Initiator must send the posting to an HR Liaison user role in order to send the posting to other user roles for review.

HR Liaison user roles have the ability to send the posting to the Employment team for review and posting. If the posting is for an IT position, the HR Liaison should send the posting to OIT for review. OIT will return the posting to the HR Liaison to send to the Employment team for review and posting.

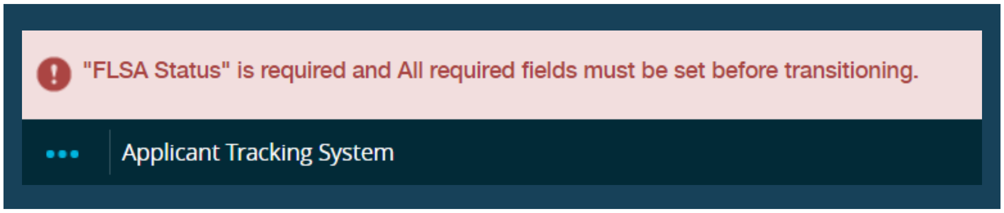
To transition the posting form to the next reviewer, the HR Liaison will select the appropriate user role from the dropdown list. When the confirmation box appears, select **Submit**.



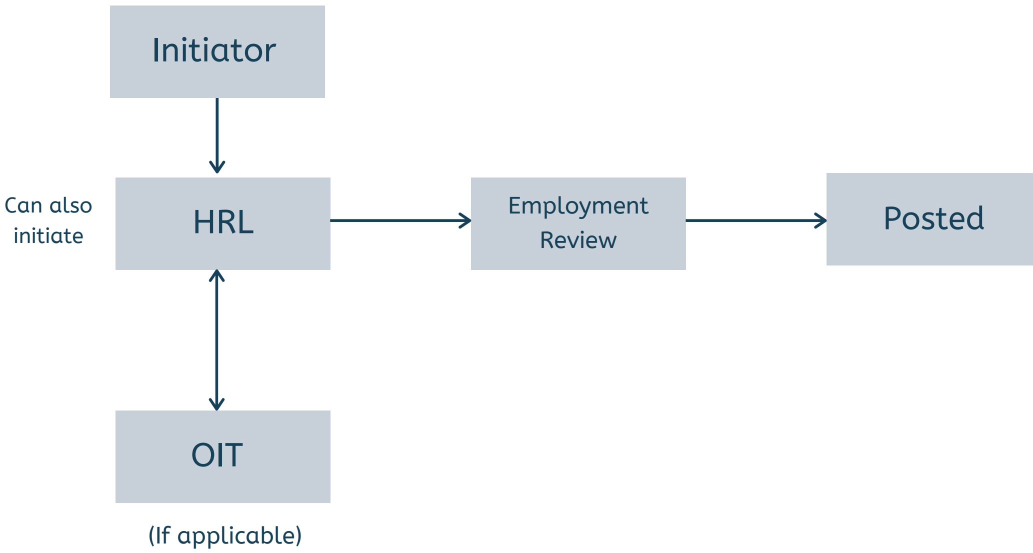
If the posting was successfully transitioned, the following banner will appear at the top of the screen.



If the posting was NOT successfully transitioned, the following banner will appear at the top of the screen. The items that need attention will be listed in the banner message.



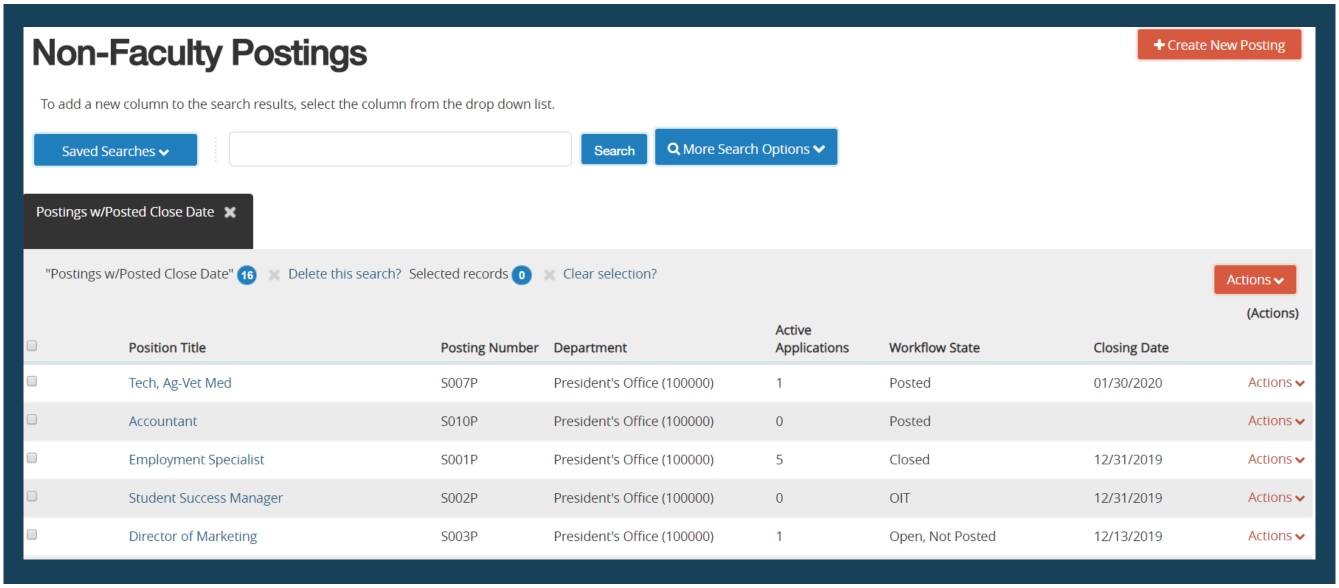
NON-FACULTY POSTING WORKFLOW



REVIEWING APPLICATIONS

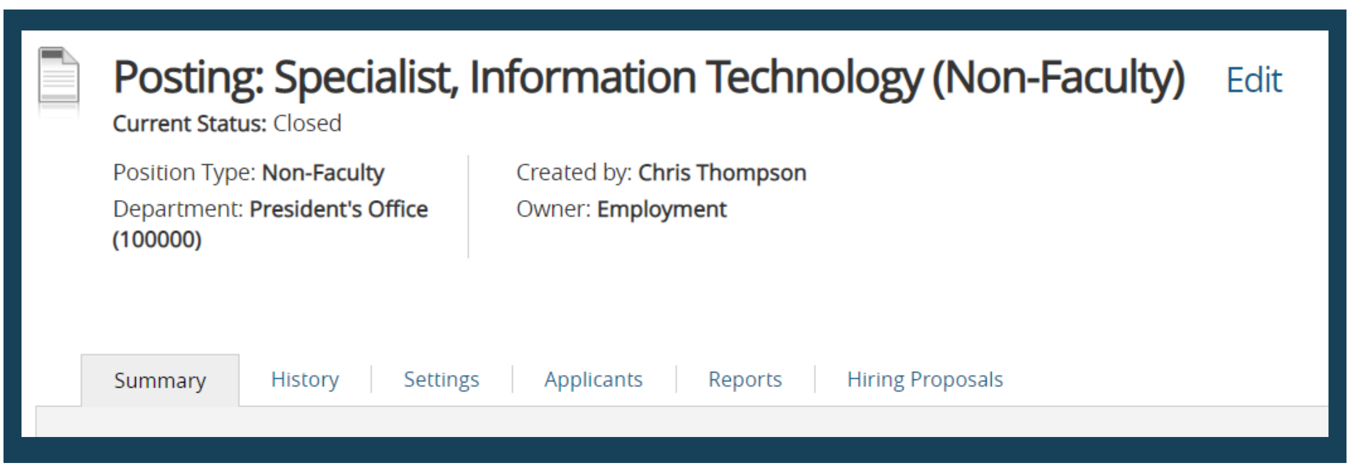
Applications may be accessed by viewing the posting. From the Welcome Page, hover over the Postings heading and select either **Non-Faculty** or **TES**.

From your list of postings, click on the title of the posting you want to view.

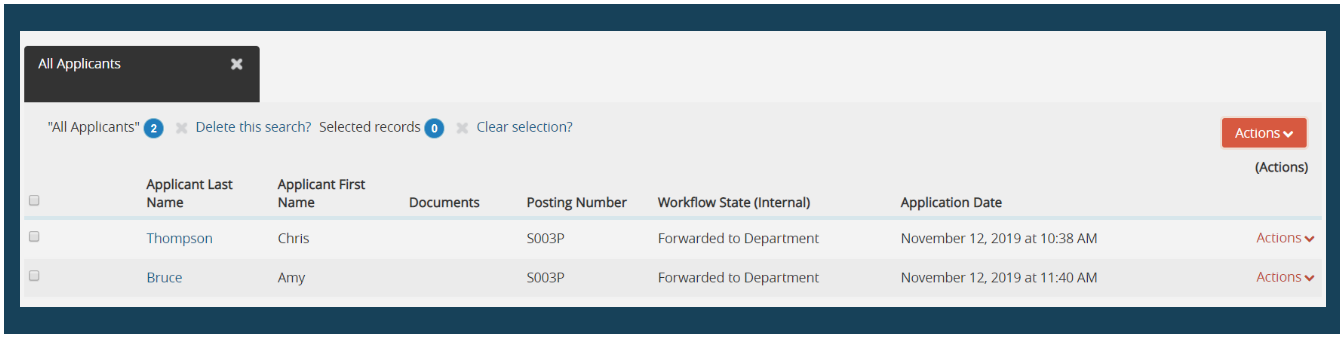


Position Title	Posting Number	Department	Active Applications	Workflow State	Closing Date	(Actions)
Tech, Ag-Vet Med	S007P	President's Office (100000)	1	Posted	01/30/2020	Actions
Accountant	S010P	President's Office (100000)	0	Posted		Actions
Employment Specialist	S001P	President's Office (100000)	5	Closed	12/31/2019	Actions
Student Success Manager	S002P	President's Office (100000)	0	OIT	12/31/2019	Actions
Director of Marketing	S003P	President's Office (100000)	1	Open, Not Posted	12/13/2019	Actions

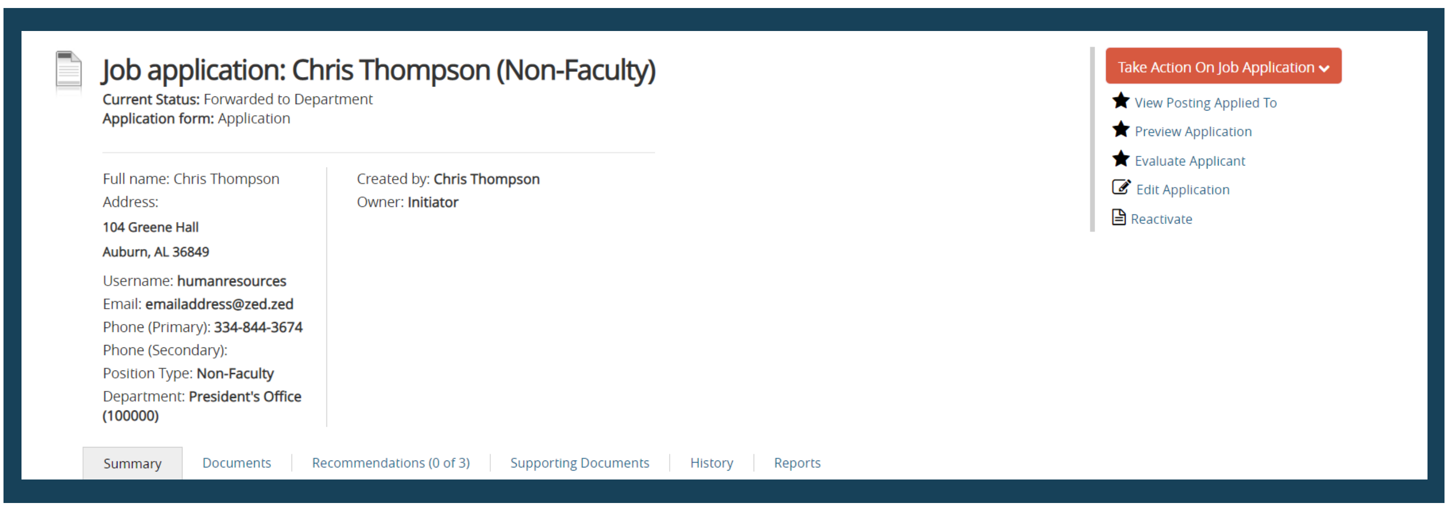
Select the **Applicants** tab.



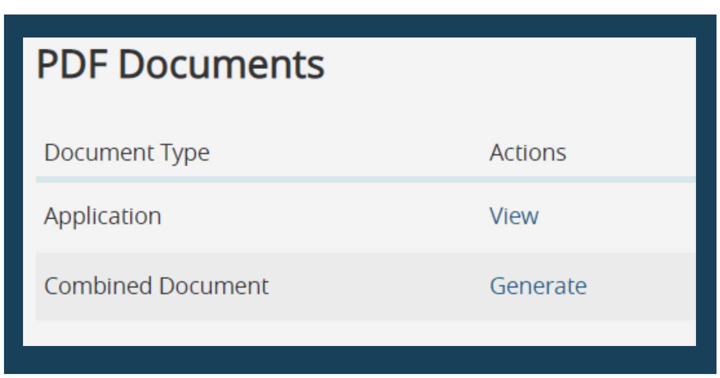
Select the name of the applicant you want to view.



The application will contain the applicant's employment history, education, reference contact information and any attachments such as resume, cover letter, etc.



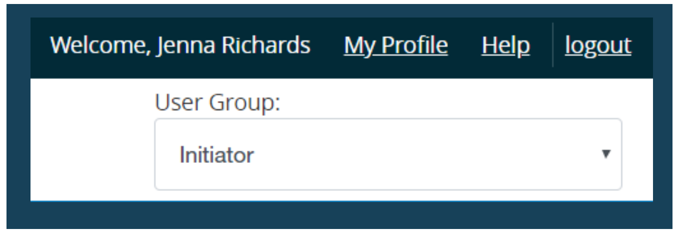
At the bottom of the application, there is a feature that will combine the application and attached documents into one PDF document. To view, select Combined Document.



CHANGING APPLICANT STATUS

It is important to know that the system is only able to give one user group the ability to change application statuses. This user group is Initiator. If an HR Liaison user needs to change application statuses, they must change their user group to Initiator.

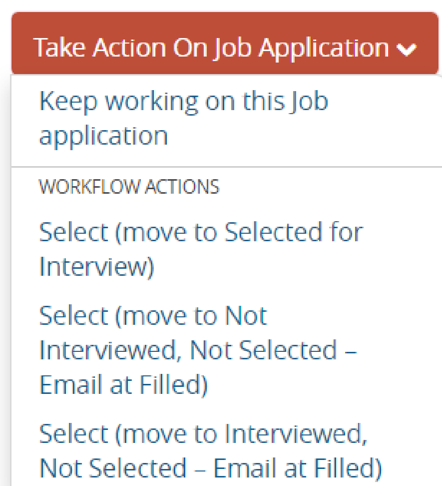
To change user roles, navigate the the top of the screen and use the dropdown menu to change the user group to Initiator.



Users who's primary user group is Initiator will not need to take any action in order to have the ability to change application statuses.

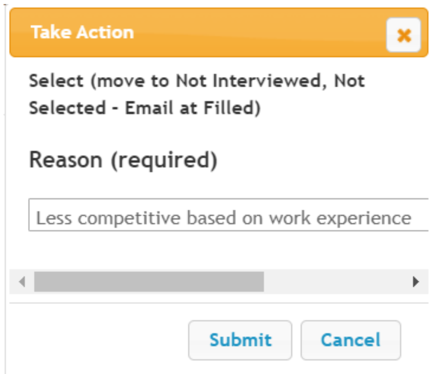
CHANGING THE STATUS OF A SINGLE APPLICATION

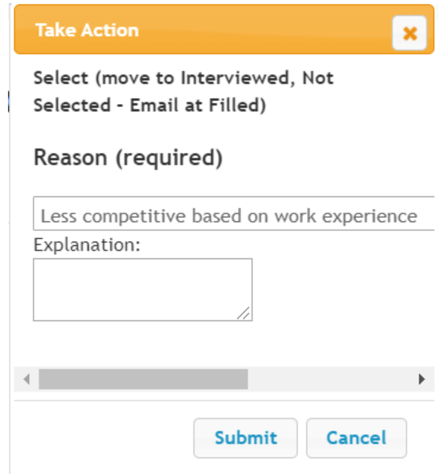
On the selected application, hover over the **Take Action On Job Application** button and choose the appropriate application status.



Some applicant status will require you to select a reason. Use the dropdown box to select the most appropriate reason that supports the status you selected.

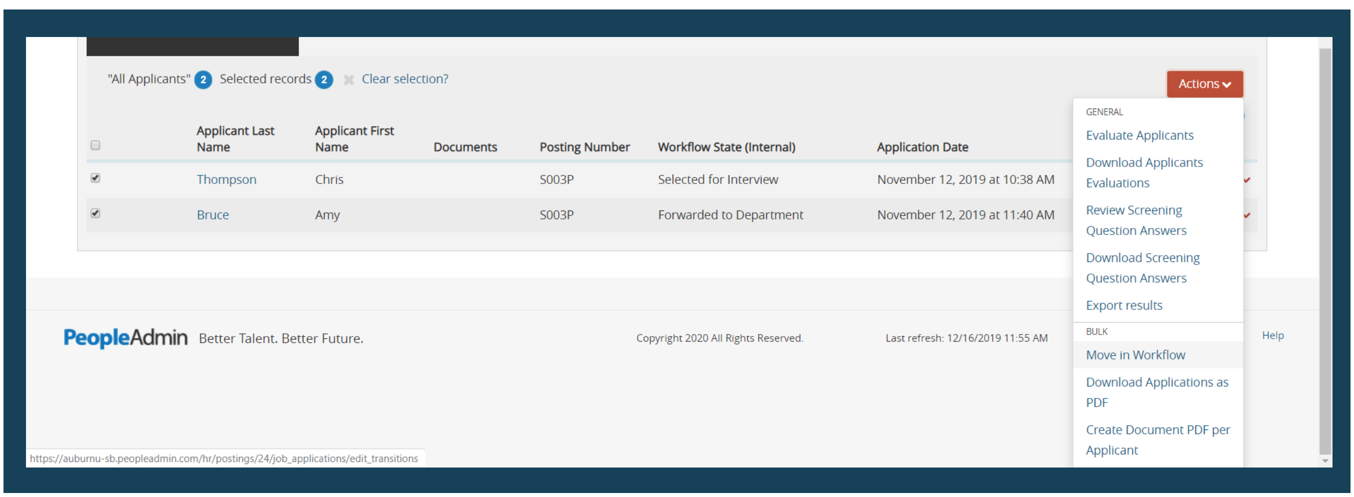
<u>For Non-Faculty positions:</u> the application statuses "Interviewed/Not Selected" and "Not Interviewed/Not Selected", you will need to provide specific rationale in the Explanation field.



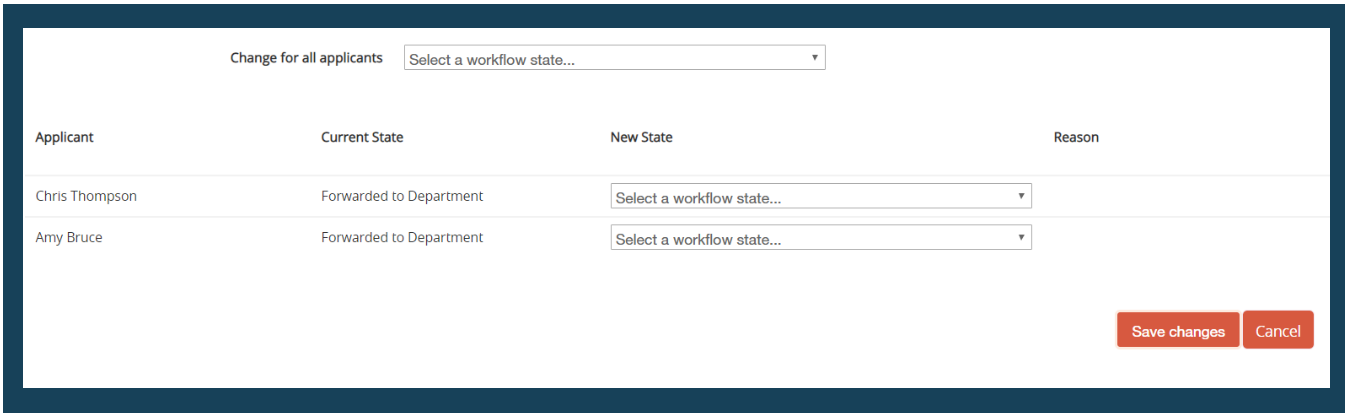


CHANGING THE STATUS OF MULTIPLE APPLICATIONS

To change multiple application statuses at once, select the check boxes next to each applicant's name.



Hover over the Actions button and select **Move in Workflow**.



Select the appropriate application status and select **Save Changes**. It can take a few minutes for this change to update the applicant list.

REQUESTING NON-FACULTY REFERENCES THROUGH PA7

- A minimum of 3 references will be required for all Non-Faculty (Not TES) positions. These will be completed using a standardized form that is sent to the reference providers. Supervisors or search chairs are encouraged to also reach out directly to reference providers or former supervisors for feedback.

- To request references, the Initiator or Human Resources Liaison will change the applicant's status to References Requested. This will trigger the autmated email to the reference provider with the form.

- Once the forms have been returned, they will appear in the Recommendations tab of the application. Once all forms have been returned by the providers, the applicant's status will automatically change to References Requested.

- Should a reference provider change or a reference is given in another manner, the Human Resources Liaison user group has the ability to override the applicant status in order to change it to References Received.

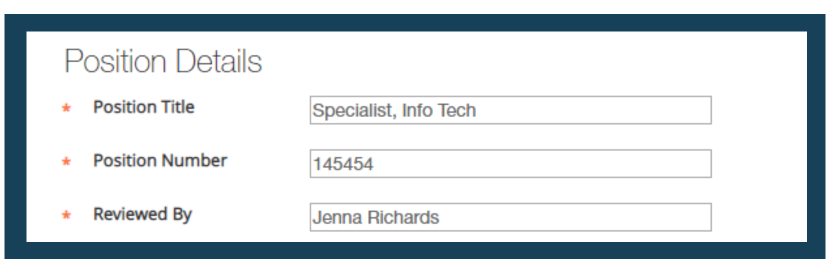
CREATING A NON-FACULTY HIRING PROPOSAL

A hiring proposal form will serve as the mechanism that hires an candidate into a position. It's a form that will be updated as pre-employment steps are completed. A hiring proposal may be created by an Initiator or HR Liaison and will follow a pre-determined workflow.

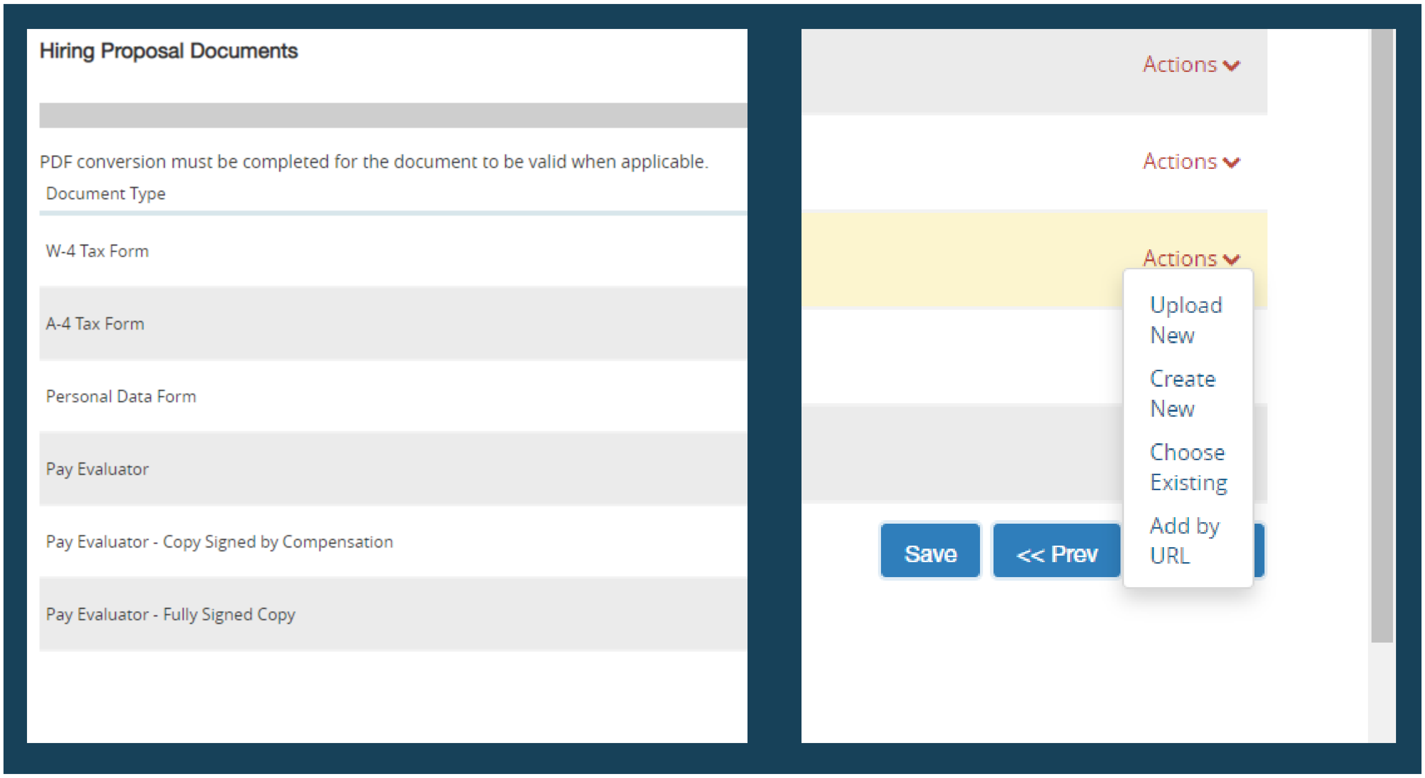
- To create a hiring proposal, the applicant status must be changed to **Recommend for Hire** from the posting. In order to change the applicant status to Recommend for Hire, all reference forms must be received, and the applicant status should be References Received.

Select **Start ATS Hiring Proposal.**

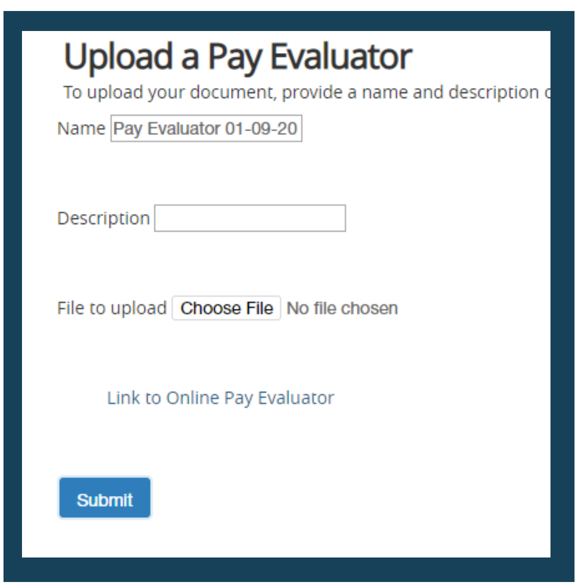
- Complete all required with a red asterisk outlined in red. Most information will populate from the application and the posting information.



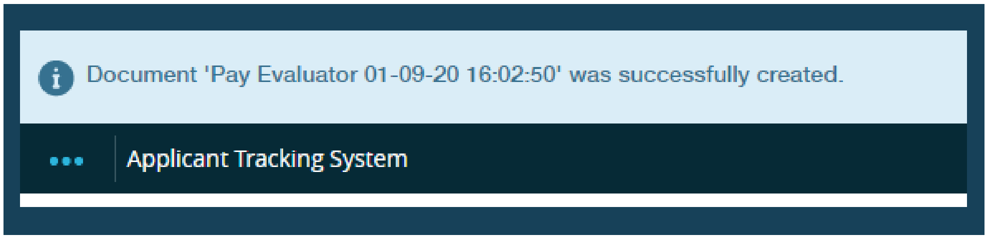
On the Hiring Documents tab, the Initiator or the Human Resources Liaison user groups should attach the pay evaluator in the correct document location. To attach a document, hover over the **Actions** text and select **Upload New**.



Select **Choose File** to locate the file on your computer. Select **Submit** to attach the file.



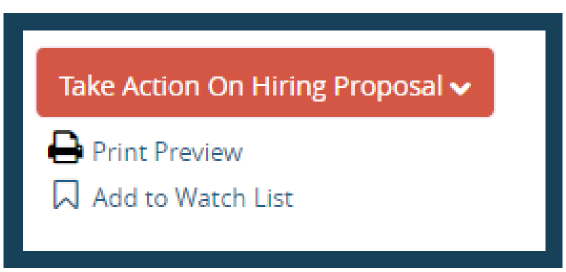
A message at the top of the screen will confirm that the file was attached.



- You will notice locations for the new hire documents to be submitted on the Hiring Proposal Documents page. These will be utilized in the last step of the process, once the candidate has signed an offer letter. We will outline the workflow for hiring proposals further in this guide.

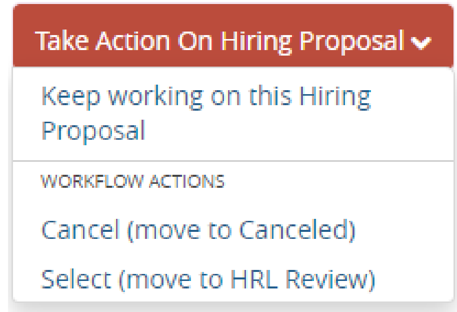
- The next page, the Hiring Proposal Summary, will show you a snapshot of all the information on the form. If you see green checks beside each section, the form is ready to be submitted. If you see an orange exclamation mark, your attention is needed to required fields.

To submit the hiring proposal to the next user, you will use the **Take Action on Hiring Proposal button**.

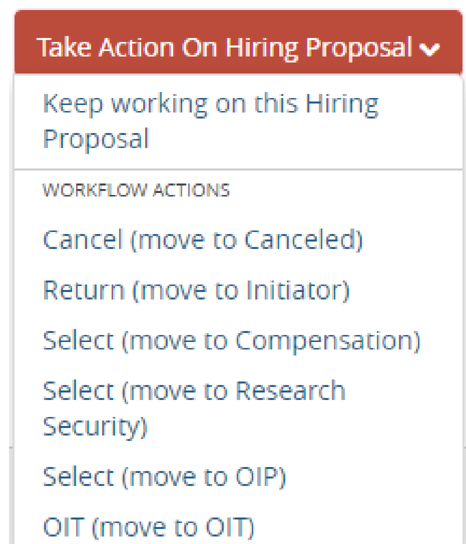


NON-FACULTY HIRING PROPOSAL WORKFLOW

If you are an Initiator, you will submit the hiring proposal to the Human Resources Liaison for review. There is also an option to Cancel.

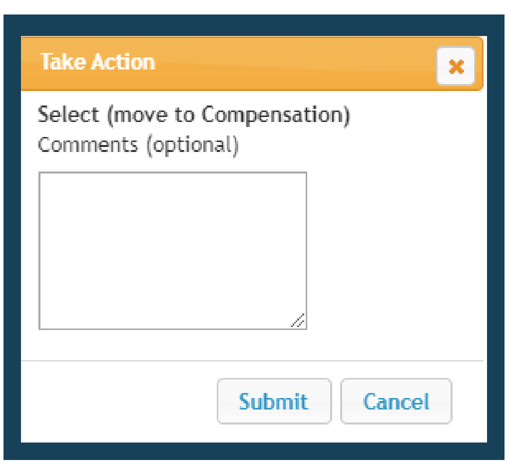


If you are a Human Resources Liaison, you will have the option to send the hiring proposal to a number of user groups.



OIT: For technical positions
OIP: If the candidate is a foreign national
Research Security: If the candidate needs a foreign background check
Compensation: If the hiring proposal is ready for the Compensation team's review
Initiator: If the hiring proposal needs to be edited or held by the Initiator

Select **Submit**

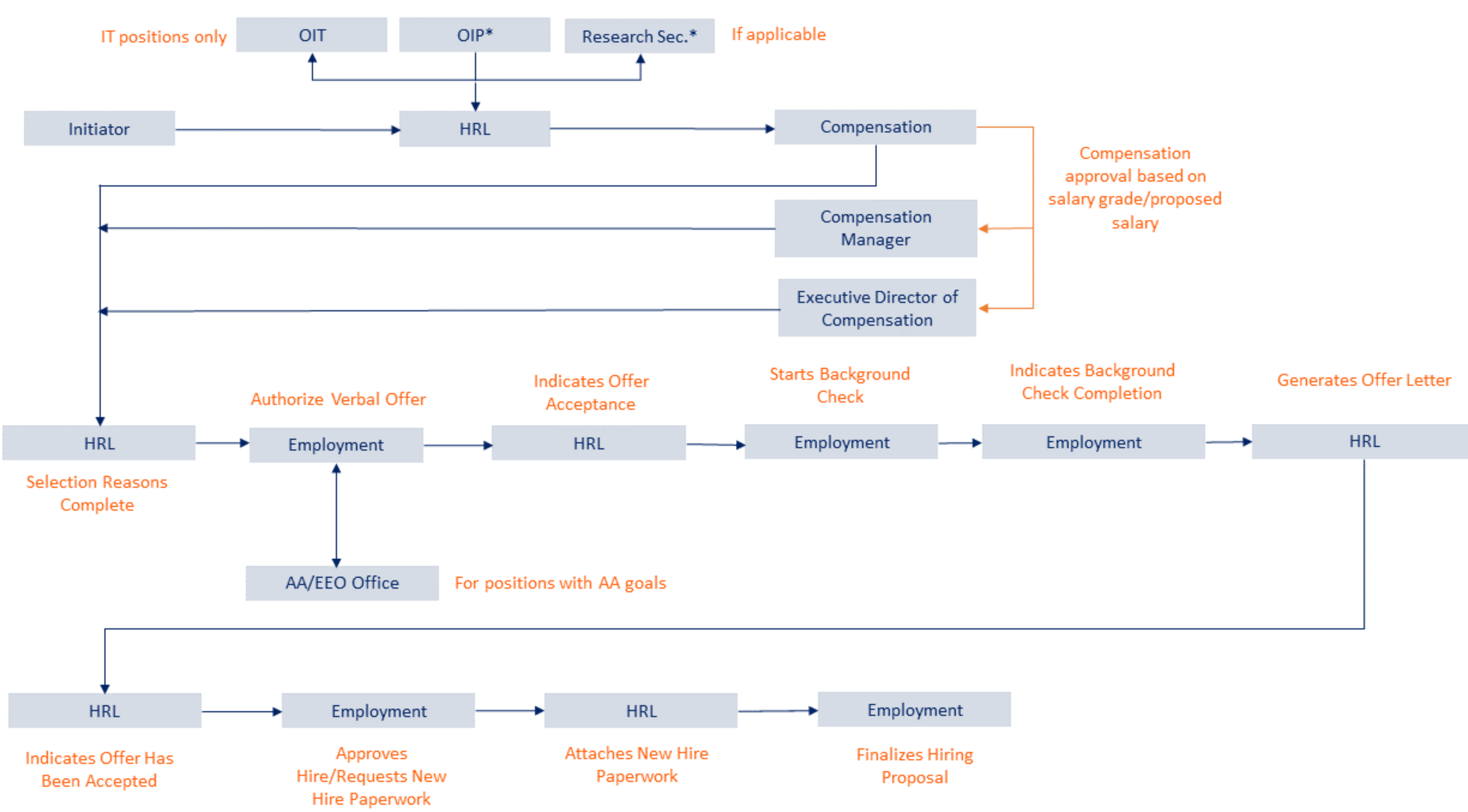


ROUTING A NON-FACULTY HIRING PROPOSAL FOR REVIEW

In order to complete the hiring proposal process, the hiring proposal form must route through a number of user groups for review, approval, or to take some form of action. When a hiring proposal is submitted to another user group, we call this a **workflow**. Once a hiring proposal is pending review from a user group, we call this a **workflow state**. Think of it as the status of the hiring proposal. Every workflow state has an owner. The owner is responsible for changing the workflow state of a hiring proposal once they have reviewed it or take a necessary action outside of the system (i.e. obtaining verbal offer acceptance)

- When users are the owner of a hiring proposal, the workflow state will indicate what action is needed from the user.
- When you are ready to send the hiring proposal to the next user, you will only have the option to send it to the correct user group or back to the previous user. This should remove the guess work in determining who should review the hiring proposal next.

NON-FACULTY HIRING PROPOSAL WORKFLOW



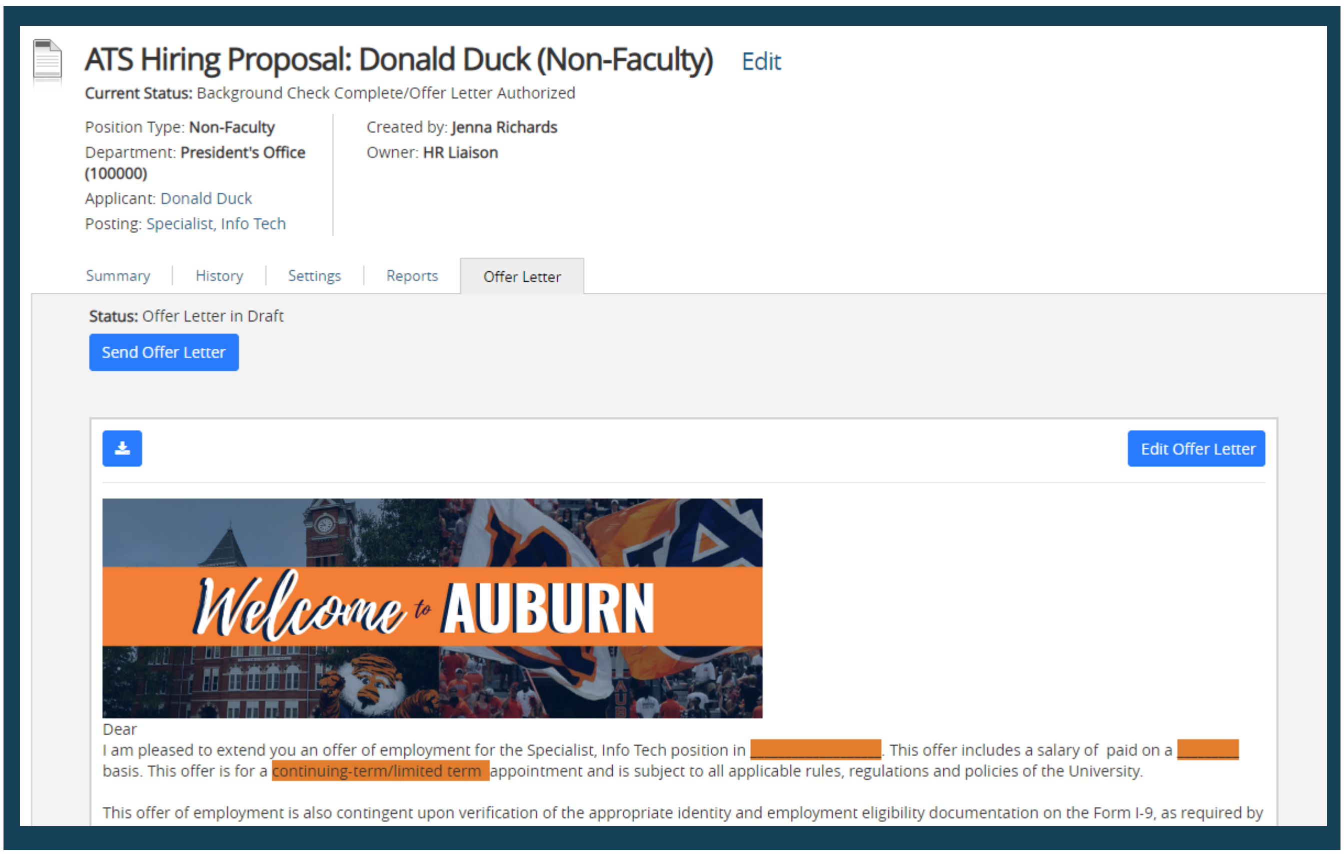
ROUTING PROCESS FOR NON-FACULTY HIRING PROPOSALS

1. **Initiator** or **HRL** creates a hiring proposal
2. If created by an **Initiator**, the Initiator will send to the **HRL** for approval
3. **HRL** will route to **Compensation** with the pay evaluator attached
4. For IT positions, **HRL** will route to **OIT**
5. For all other positions, **Compensation** reviews the pay evaluator, attaches a signed copy of the pay evaluator, and routes the hiring proposal to the **HRL**
6. **HRL** attaches pay evaluator with all signatures to the hiring proposal and routes to **Employment** once all applicant selection reasons have been completed
7. For positions with Affirmative Action goals – **Employment** routes to **AA/EEO**
8. **AA/EEO** route returns hiring proposal to **Employment**
9. **Employment** authorizes verbal offer by sending the hiring proposal to the **HRL**
10. For positions without Affirmative Action goals – **Employment** authorizes verbal offer by sending the hiring proposal to the **HRL**
11. **HRL** returns the hiring proposal, indicating verbal offer acceptance - Employment orders background check
12. **Employment** changes workflow state to indicate the background check is processing
13. **Employment** returns hiring proposal to **HRL** indicating background check clearance
14. **HRL** generates offer letter (function is within the hiring proposal form) and submits to the Finalist. Finalist will digitally sign and return the offer letter.
15. Once the Finalist signs the offer letter, **HRL** routes the hiring proposal to **Employment**
16. **Employment** routes to the **HRL** to hold for new hire documents
17. Once new hire paperwork is attached, **HRL** routes to **Employment**, who finalizes hiring proposal

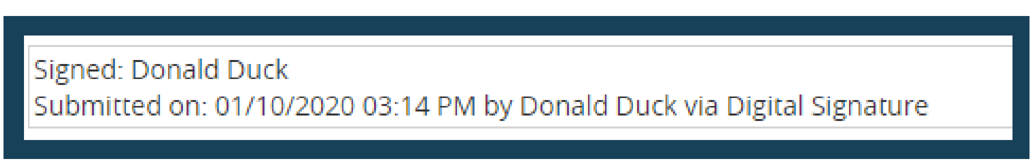
GENERATING AND SENDING OFFER LETTERS

Offer Letters are generated from the hiring proposal form. Once Employment or TES changes the workflow state to Background Check Complete/Request for Offer Letter, the Human Resources Liaison user type will be able to create the offer letter from a template.

From the hiring proposal, locate the Offer Letter tab. Select the **Edit Offer Letter** button to make changes to the offer letter. Complete the highlighted fields, remove the highlights, and select **Save**. Then, select **Send Offer Letter**.



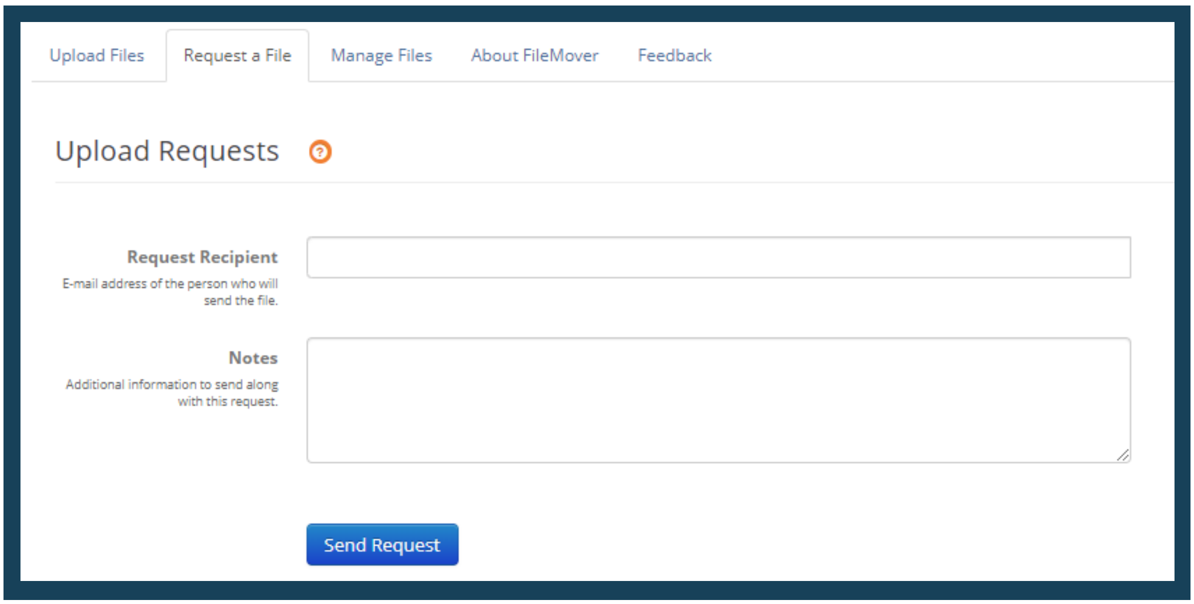
Once the offer letter has been signed, the digital signature will appear below the offer letter. Once signed, the Human Resources Liaison will route the hiring proposal to Employment or TES, indicating that the offer letter has been signed. The workflow state will be Offer Letter Signed/Offer Accepted. The hiring proposal will then route from Employment to the Human Resources Liaison so that the new hire documents may be attached.



ATTACHING NEW HIRE DOCUMENTS TO NON-FACULTY HIRING PROPOSALS

To complete the hiring proposal process, Employment will route the hiring proposal to the Human Resources Liaison in order for new hire documents to be attached to the hiring proposal.

It is recommended that the Human Resources Liaison use Auburn University's File Mover (https://filemover.auburn.edu/fm_login.php) to send the new hire document links to the new employee. This can be done by requesting a file, and entering the links in the Notes field.



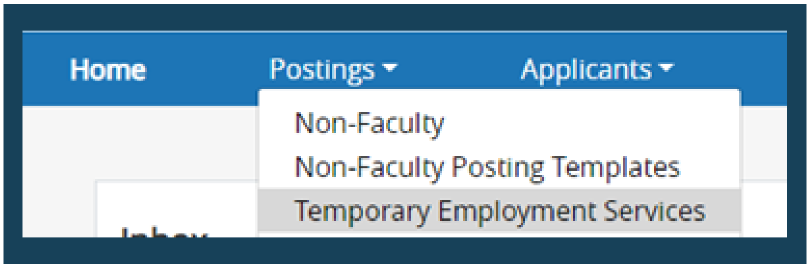
Link to W-4:
https://www.irs.gov/pub/irs-pdf/fw4.pdf
Link to A-4:
https://revenue.alabama.gov/wp-content/uploads/2017/05/A4_201403.pdf#A-4
Link to PDF:
https://www.auburn.edu/administration/human_resources/forms/pdf_2015.pdf#Personal%20Data%20Form

Once new hire documents are attached to the hiring proposal, the hiring proposal may be routed to Employment to be finalized.

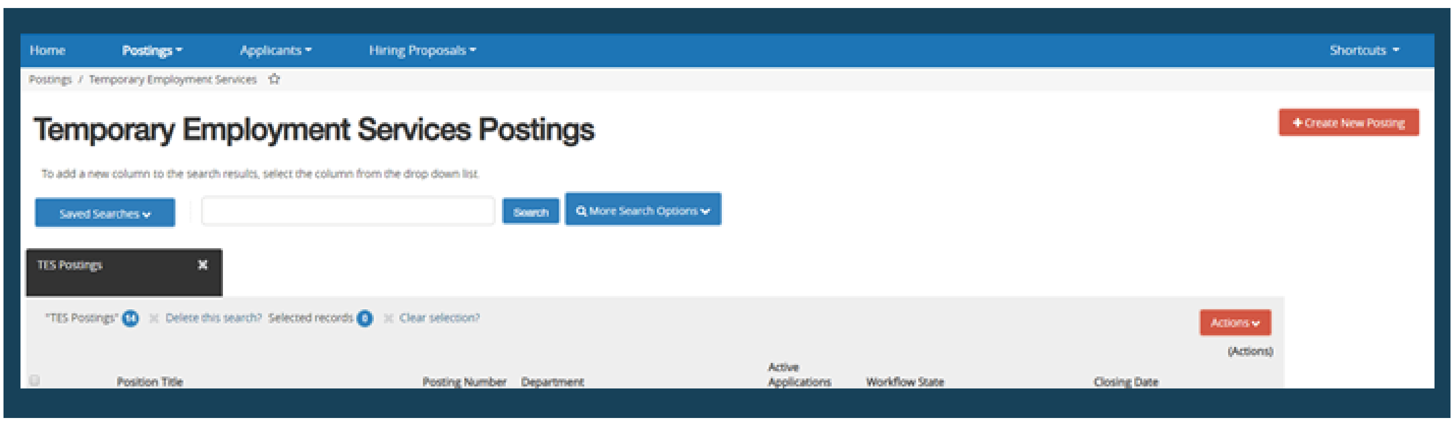
The Employment team will create the Banner ID and Username in JumpStart before finalizing the hiring proposal, so that accesses may be granted early in the process.

CREATING A TES POSTING

Hover over the Postings link at the top of the Welcome Page and select **Temporary Employment Services**



Select **Create New Posting**.

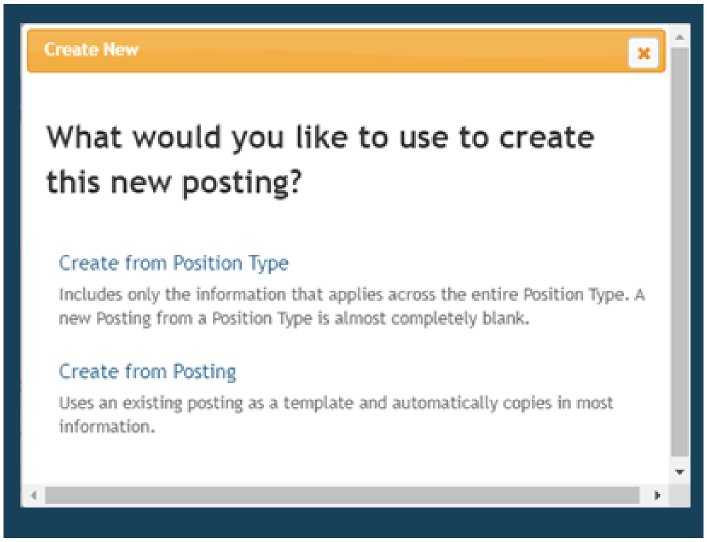


There are a few options for creating postings.

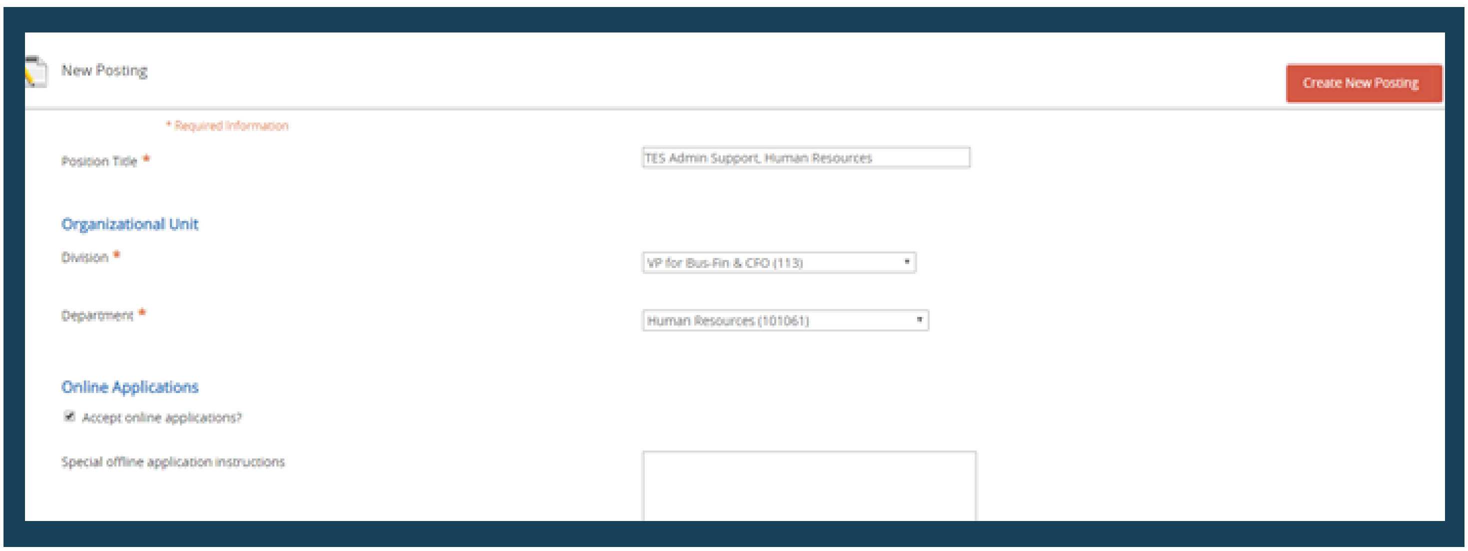
Create from Position Type: This option will provide a completely blank form to create a posting.

Create from Posting: This option will allow users to duplicate an existing posting. Keep in mind there will be no existing entries if the position has not been in the system previously.

Select **Create from Position Type**.



Complete Position Title then select the appropriate Division and Department and select **Create New Posting**.



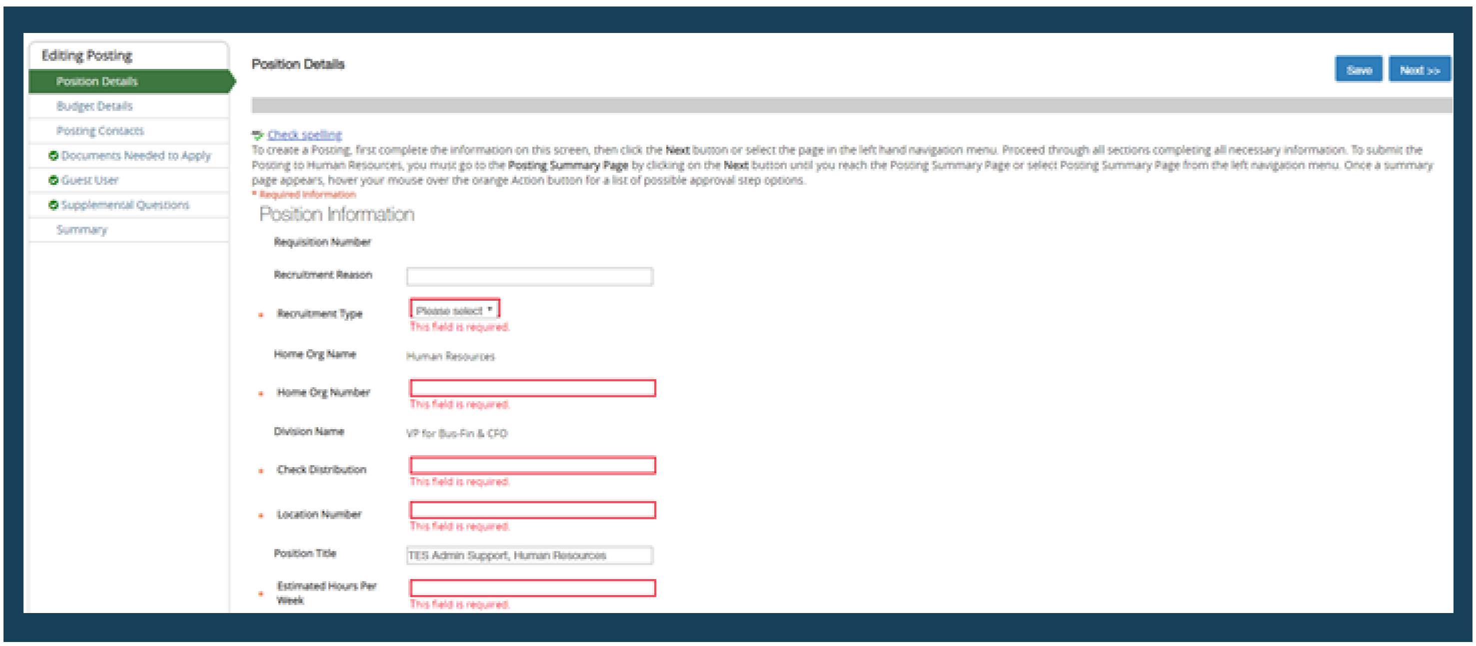
Complete all required fields on the Posting Details, Advertising & Budget Details and Posting Contacts pages. To progress to each page, use the Next button, or navigate using the sidebar menu.

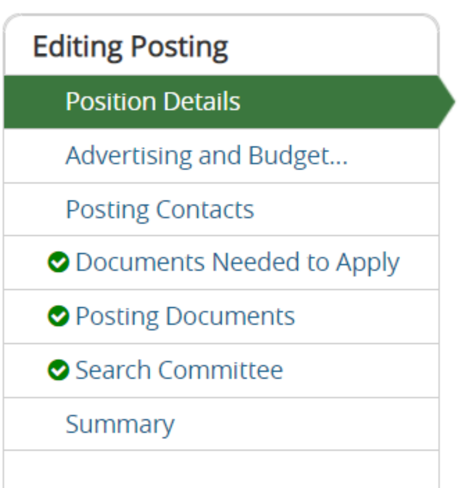
There will be a number of required fields to complete. These fields will be notated by an asterisk and red outline. The form may not be submitted until these fields are completed.

IMPORTANT: Recruitment Type determines the path of your workflow.

- **Direct Hire** – This process is used when a department has already identified the candidate they are wanting to hire. Direct Hire postings will be privately posted so only the selected candidate can apply.

- **Recruitment** – used when a department needs applications to review. Recruitment postings will either be advertised on the website for applicants to apply or HR will add applications from a pooled posting.

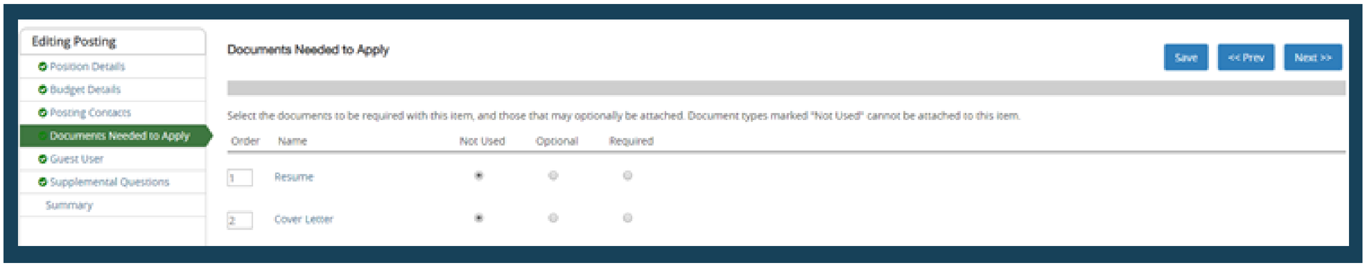




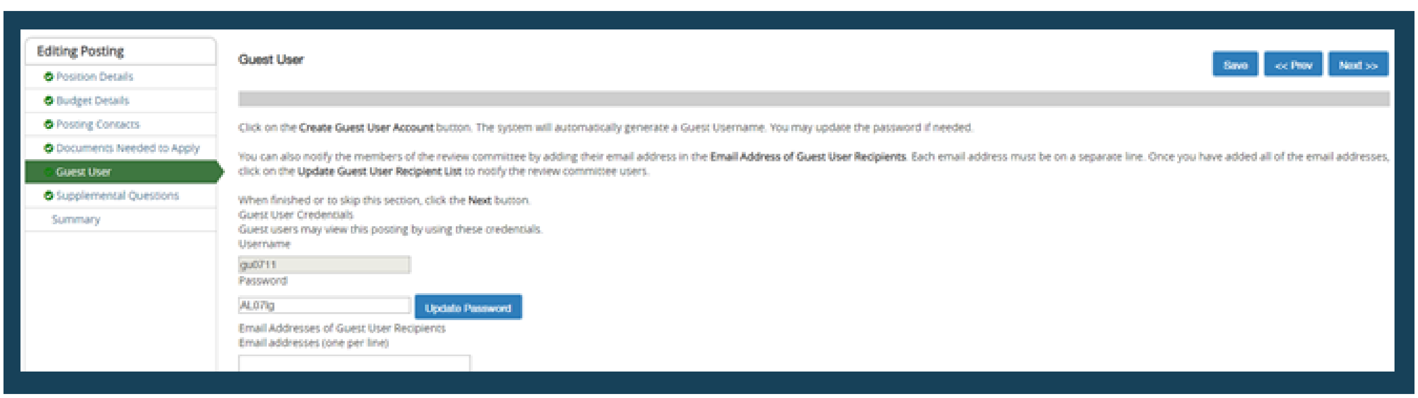
You can navigate through the pages of the posting form using the sidebar menu or the Next button. You can save your changes by selecting the Save or the Next button on each page of the form.

On the page labeled Documents Needed to Apply, users will identify the documents they will require applicants to attach to their applications.

- **Not Used** – no document will be able to be uploaded
- **Optional** – document type is optional but not required to submit application
- **Required** – document type to submit application



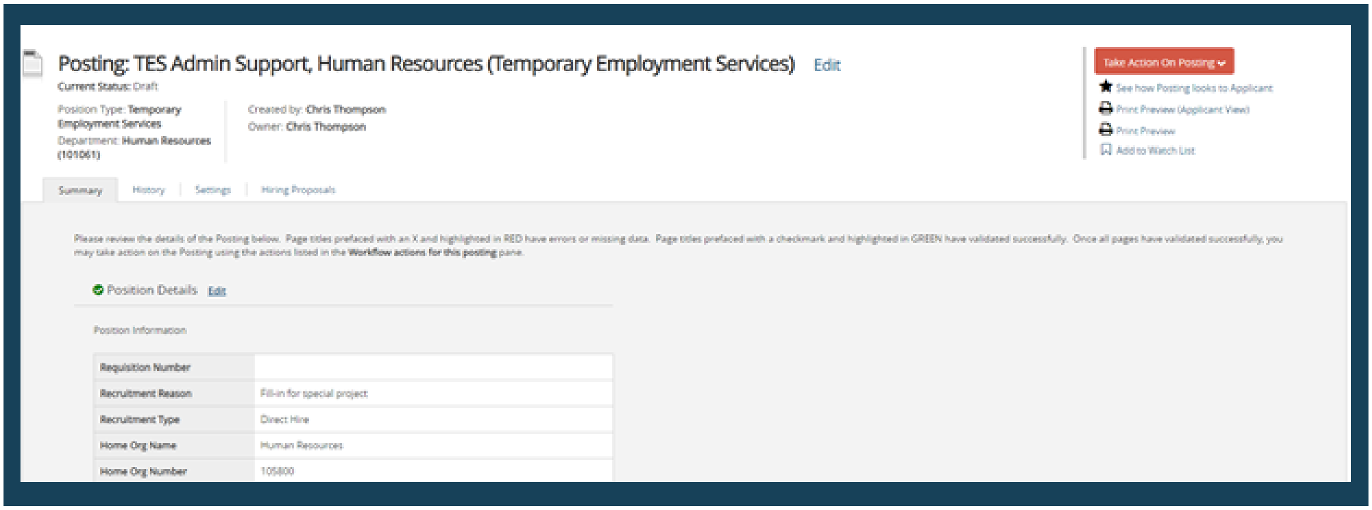
Guest Users are only for non-users whom will need to be able to review applications (i.e. Supervisors who are not an initiator or HRL). To create a Guest User, simply click on **Create Guest User Account**. A username and password will be automatically generated for you. Add email address(es) of recipients needing to review applications to posting.



Supplemental Questions should be used to initially screen applications. You may set these up or HR can set them up based on what is provided in the posting

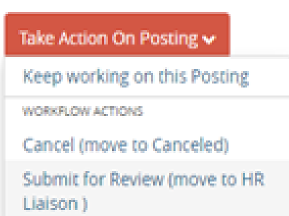
SUMMARY PAGE AND SUBMITTING POSTING FOR REVIEW

The last page of the posting form is the Summary page. This will provide users with a one page view of all pages of the posting form. Ensure each section has a green check mark - this means the section is complete. Orange check marks signifies that the page has required fields that must be completed.

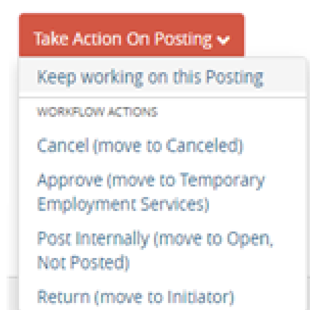


When users are ready to submit the posting for review, hover over the orange button that says **Take Action on Posting**.

Initiator View:

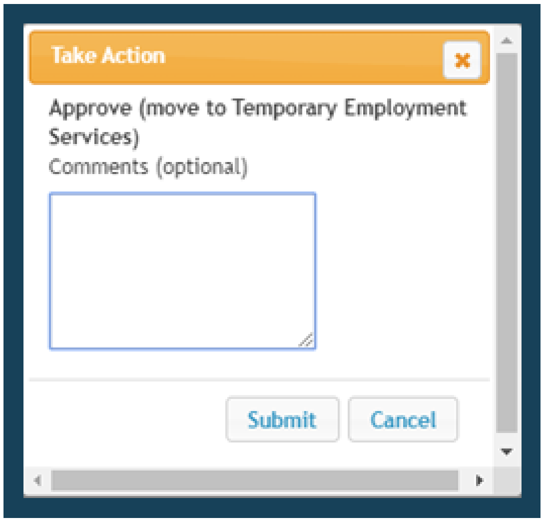


HR Liaison View:

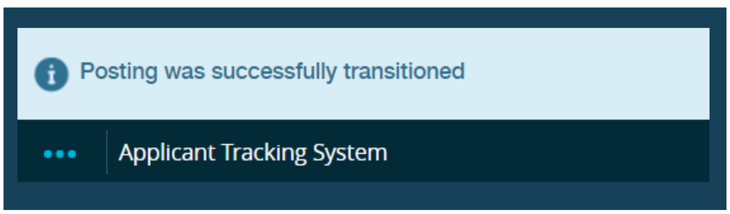


Users who have created postings as an Initiator must send the posting to an HR Liaison user role in order to send the posting to other user roles for review.

To transition the posting form to the next reviewer, the HR Liaison will select the appropriate user role from the dropdown list. When the confirmation box appears, select **Submit**.



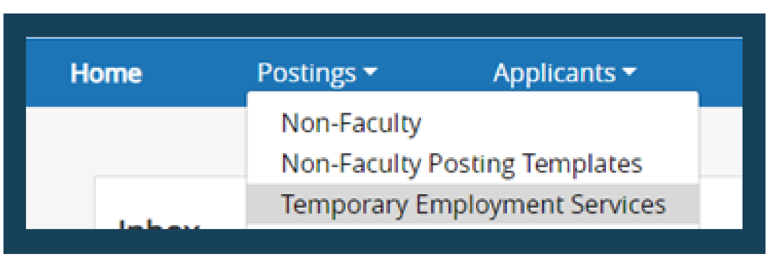
If the posting was successfully transitioned, the following banner will appear at the top of the screen.



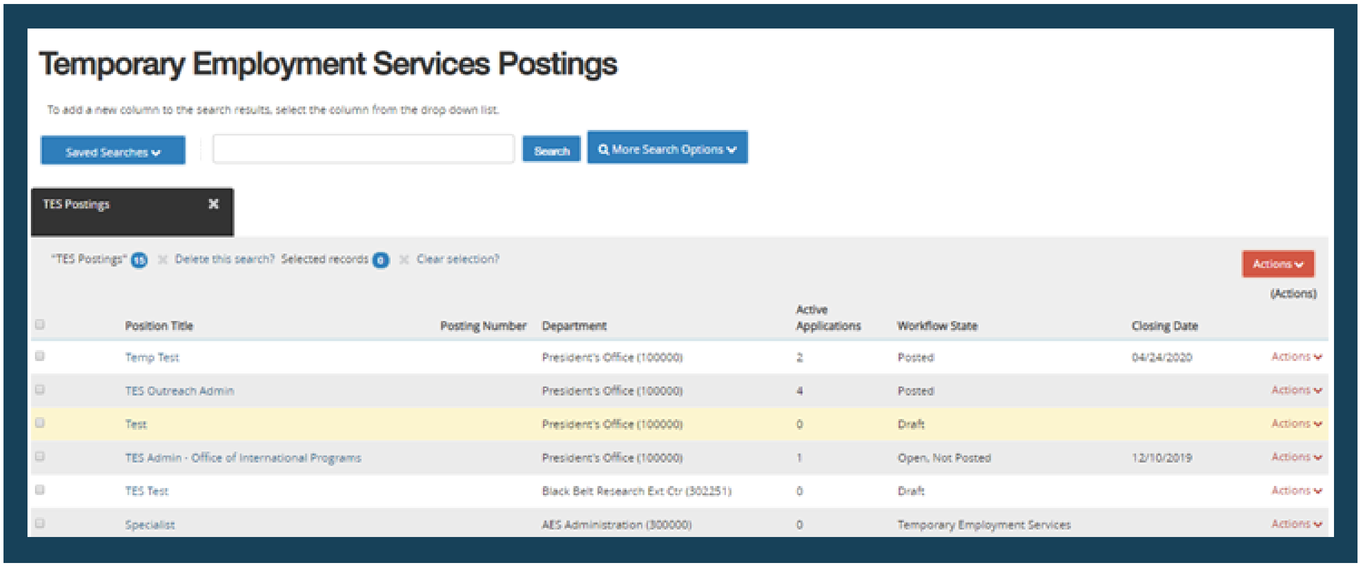
CREATING A TES HIRING PROPOSAL

A hiring proposal serves as the mechanism that hires a candidate into a position. A hiring proposal may be created by an Initiator or HR Liaison.

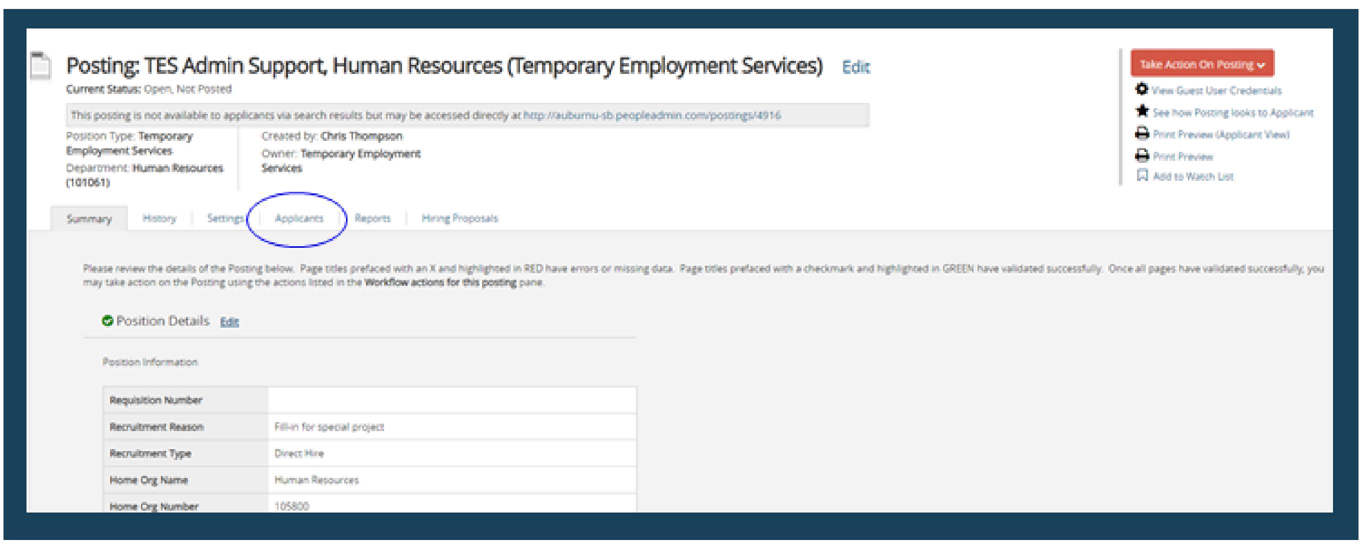
Hover over the Postings link at the top of the Welcome Page and select **Temporary Employment Services.**



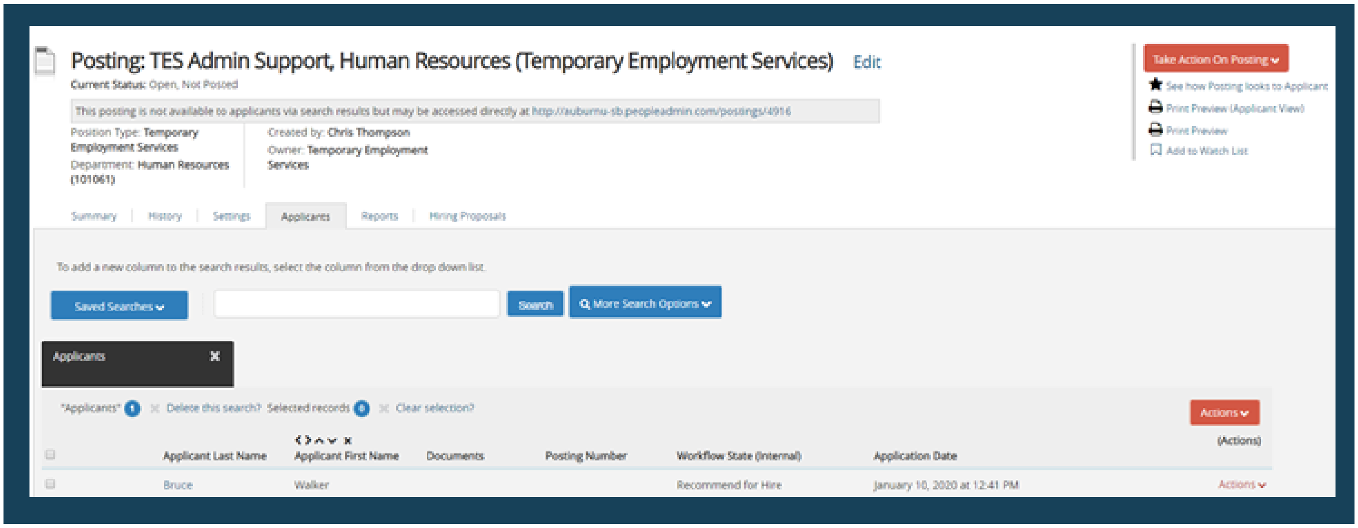
Select the position you would like to create a hiring proposal on.



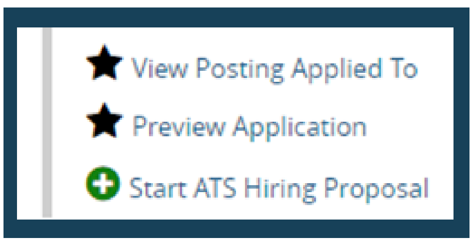
Locate and click on the Applicants tab.



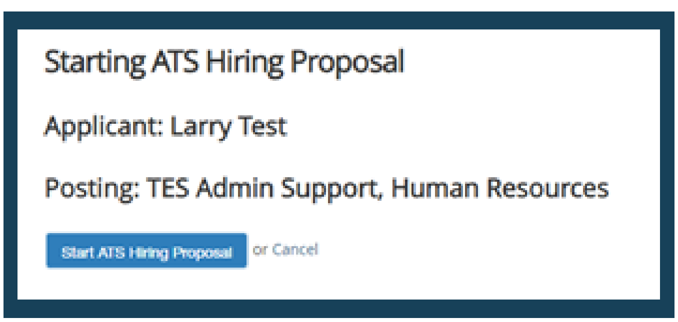
Click on the Applicant that is being recommended for hire in the hiring proposal.



Click on Start ATS Hiring Proposal located on the right hand of the screen



The next screen will verify what candidate and position you are starting a hiring proposal on. **Click the Start ATS Hiring Proposal** button to proceed or Cancel to go back to the previous slide



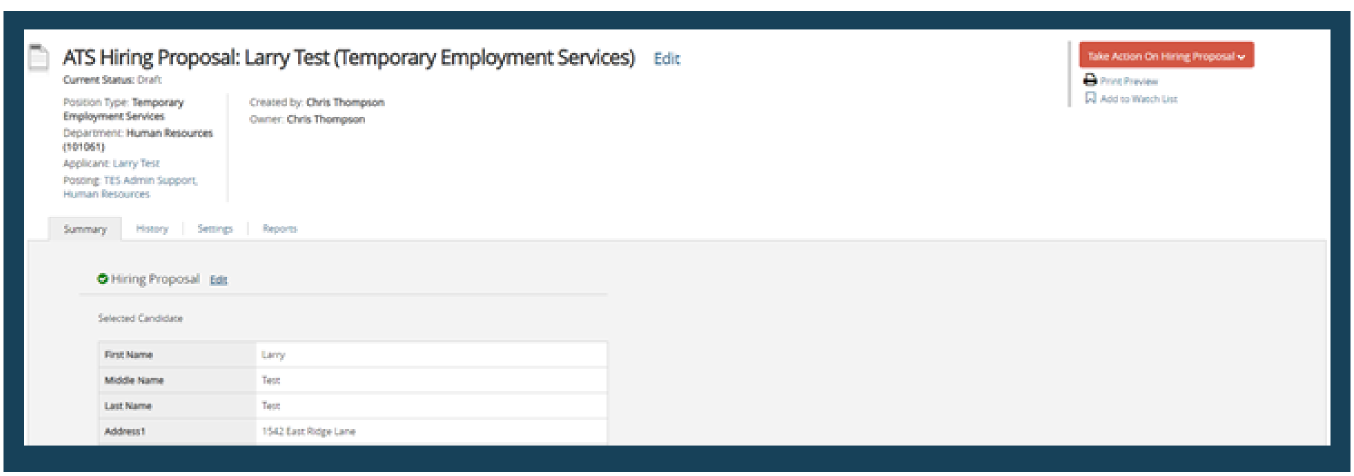
Most information will copy over from the posting, scroll to the bottom to view and complete Hiring Proposal Information.

To progress to each page, use the Next button, or navigate using the sidebar menu

There will be a few required fields to complete (Finalized Pay Rate Per Hour, Hire Date, End Date, Position Type and Will this position be responsible for driving a University vehicle?). These fields will be notated by an asterisk and red outline. The form may not be submitted until these fields are completed.

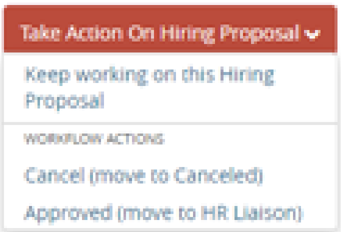
SUMMARY PAGE AND SUBMITTING TES HIRING PROPOSAL FOR REVIEW

The last page of the hiring proposal is the Summary page. This will provide users with a one page view of all pages of the hiring proposal form. Ensure each section has a green check mark - this means the section is complete. Orange check marks signifies that the page has required fields that must be completed

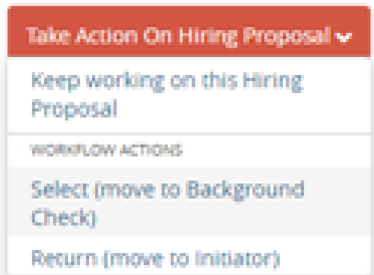


When users are ready to submit the hiring proposal for review, hover over the orange button that says **Take Action on Hiring Proposal**.

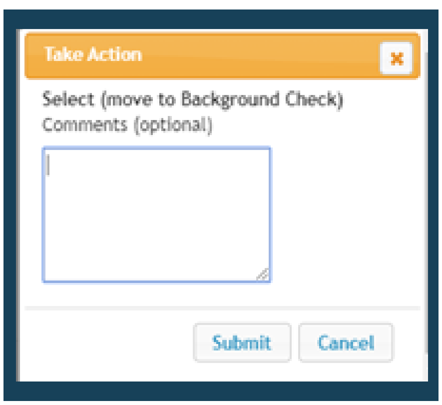
Initiator View:



HR Liaison View:



To transition the posting form to the next reviewer, the Human Resources Liaison will select the appropriate user role from the dropdown list. When the confirmation box appears, select **Submit.** This step will initiate TES to run a background check and an email with instructions will be generated to the applicant.



After the background check is complete, TES will send the hiring proposal back to the Human Resources Liaison to initiate an offer letter, current status will appear as Background Check Complete/Request for Offer Letter. See Offer Letter section for further instruction.

EMAIL NOTIFICATIONS

A number of email notifications are automated by the applicant tracking system. If a posting or hiring proposal is pending review from your user group, you will receive an email notification. Human Resources Liaisons will receive email notifications anytime a posting or hiring proposal is submitted to a new user group.

Additionally, the system will send the following:

- Email to applicant when application is disqualified for not meeting minimum qualifications
- Email to applicants who were not selected for positions. This is triggered when the position is marked as Filled by Employment, once the hiring proposal is finalized.
- Email to finalist candidate with background check information once verbal offer is accepted.
- Email to finalist candidate containing the offer letter, once action is triggered by Human Resources Liaison.

APPLICANT TRACKING SYSTEM ASSISTANCE

For questions or help using the system, please contact the Employment Services team for Non-Faculty positions, and Temporary Employment Services for TES positions using the contact information below. Please visit our Project PeopleAdmin website for additional resources and to access the PeopleAdmin Helpdesk to report system issues to our team.

Employment Services

Jenna Richards
(334) 844-1613
Jbr0040@auburn.edu

Chris Thompson
(334) 844-1614
Cot0001@auburn.edu

Temporary Employment Services (TES)

Amy Bruce
(334) 844-1671
robera2@auburn.edu