

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
- Technical Assistance

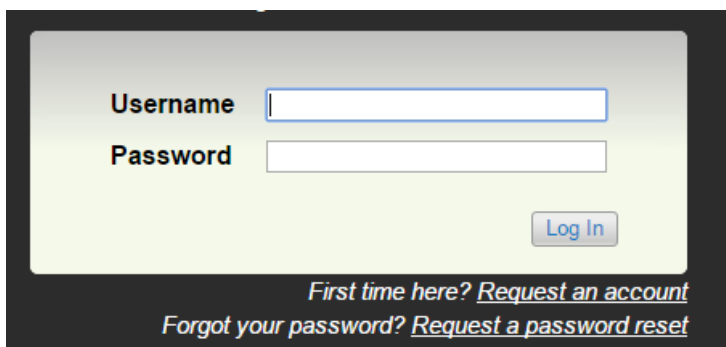
INTRODUCTION TO APPLICANT TRACKING

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.

The image shows a login interface for the PA7 Applicant Tracking Module. It features a light green rectangular box with a thin border. Inside the box, the word "Username" is followed by a text input field. Below that, the word "Password" is followed by another text input field. To the right of the password field is a "Log In" button. Below the input fields, there are two lines of text: "First time here? [Request an account](#)" and "Forgot your password? [Request a password reset](#)". The entire login box is set against a dark background.

- 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.

...

Hire

Welcome, System Account

My Profile

Help

PEOPLEADMIN

At Your Service

User Group:

Human Resources

Home

Postings

Applicants

Hiring Proposals

Onboarding Events

Shortcuts

Welcome to your Online Recruitment System

Inbox

Postings 2

Users 1

Hiring Proposals

Position Requests 2

Onboarding Tasks

Special Handling Lists

SEARCH

Filters

| TITLE | CURRENT STATE | DAYS IN CURRENT STATE |
|-------------------------------|-----------------|-----------------------|
| Auditor General Accounting | Human Resources | 1746 |
| Technical Grant Writer | Human Resources | 1740 |

0 Filled Postings
Last 30 days

0

Administrative Staff

Professional Staff

Faculty

Temporary/Student

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**.

...

Applicant Tracking System

AUBURN UNIVERSITY

HUMAN RESOURCES

Home

Postings

Hiring Proposals

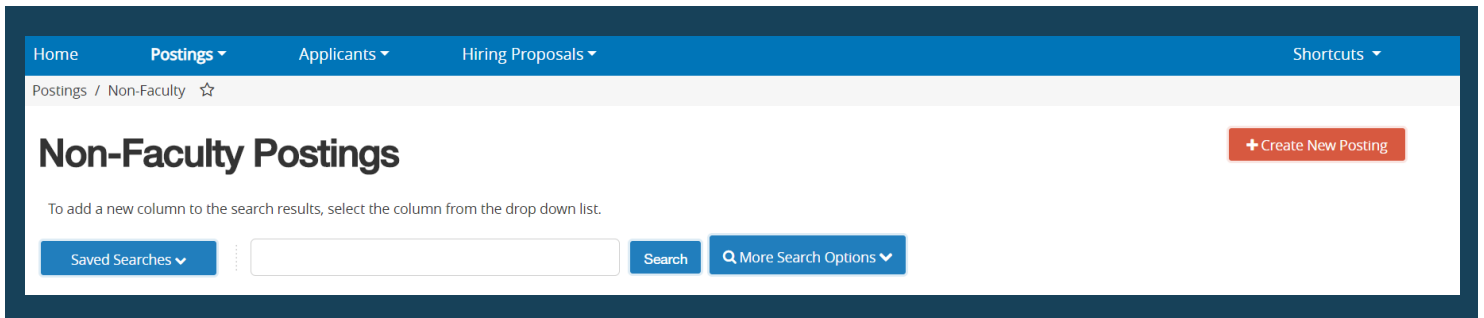
Inbox

Non-Faculty

Non-Faculty Posting Templates

Temporary Employment Services

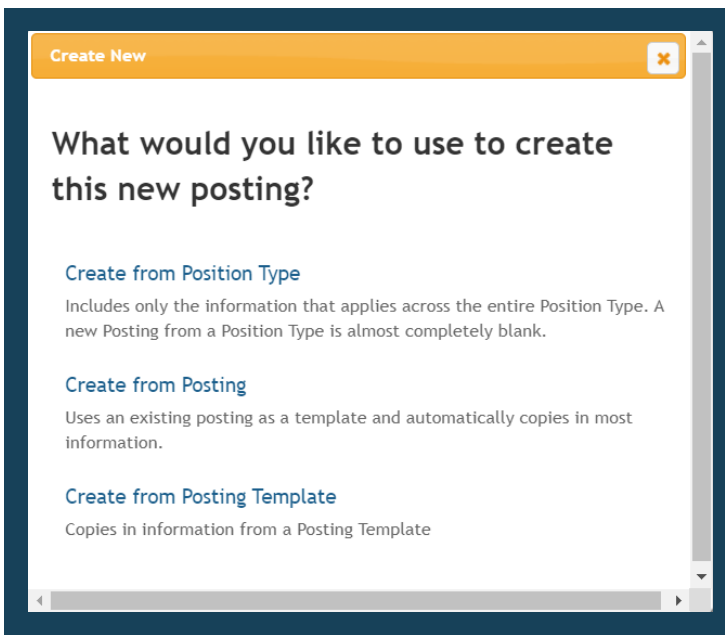
Select **Create New Posting**. There are a few options for creating postings.



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

Non-Faculty Posting Templates

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

Saved Searches ▾

Search

🔍 More Search Options ▾

Posting Templates



"Posting Templates" 1203

← Previous

1

2

3

4

5

6

7

8

9

...

40

41

| 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.

Posting Template: Admstr, Academic Programs (Non-Faculty)


Current Status: Approved

Position Type: **Non-Faculty**
Organizational Unit: **Auburn University (Auburn University)**

🖨️ Print Preview

➕ Create Posting from this Posting Template

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

 New Posting Create New Posting Cancel

*** Required Information**

Position Title *

Organizational Unit

Division *

Department *

Online Applications

☒ Accept online applications?

Special offline application instructions

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.

Editing Posting

Position Details

Advertising and Budget...

Posting Contacts

☒ Documents Needed to Apply


☒ Posting Documents

☒ Search Committee

Summary

Position Details

Save Next >>

 [Check spelling](#)

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

*** Required Information**

Position Information

Requisition Number

* Internal Search Requested
This field is required.

Home Org Name

* Home Org Number
This field is required.

Division Name

* Timekeeping Location
This field is required.

* Location Number
This field is required.

* Position Title

* Position Number
This field is required.

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.

Editing Posting

Position Details

Advertising and Budget...

Posting Contacts

✓ Documents Needed to Apply

✓ Posting Documents

✓ Search Committee

Summary

Job Summary

Coordinates and/or directs all aspects of academic related program(s) and service(s).

* Essential Functions

Plans, designs, develops, executes, and/or manages strategies and programs for academic related programs/groups/services (may assists in this function rather than be solely responsible in the lower level jobs of the family). Assists program head with a variety of high-level administrative/professional program support

Minimum Education and Experience

Please review most current job description: http://www.auburn.edu/administration/human_resources/compensation/ccp/jd/jd-title.htm

Education Level

Insert education level required for each job level y

Degree in discipline related to program

Field of Study

Years of Experience

Insert years of experience required for each job le

Experience in project or program administration

Area of Experience

- 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**.

Add Existing User

Search:

Department:

☒ Display search committee user group members only

Search

| Last Name | First Name | Email | Department | Committee Chair | (Actions) |
|-----------|------------|----------------------|--------------------|--------------------------|-----------------------|
| Thompson | Chris | emailaddress@zed.zed | President's Office | <input type="checkbox"/> | <div>Add Member</div> |
| Cargill | Jennifer | emailaddress@zed.zed | Auburn University | <input type="checkbox"/> | <div>Add Member</div> |
| Richards | Jenna | emailaddress@zed.zed | Auburn University | <input type="checkbox"/> | <div>Add Member</div> |

Displaying all 3 User

Create New User Account

Close

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**.

New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.
Required fields are indicated with an asterisk (*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

* First Name

* Last Name

* Email

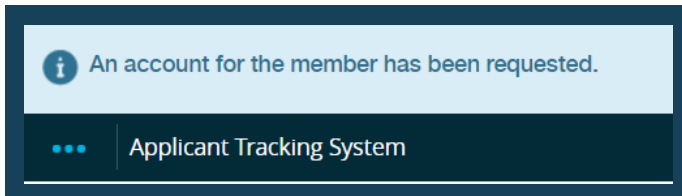
* Username

☐ Make this user committee chair

Add Member to Search Committee

Close

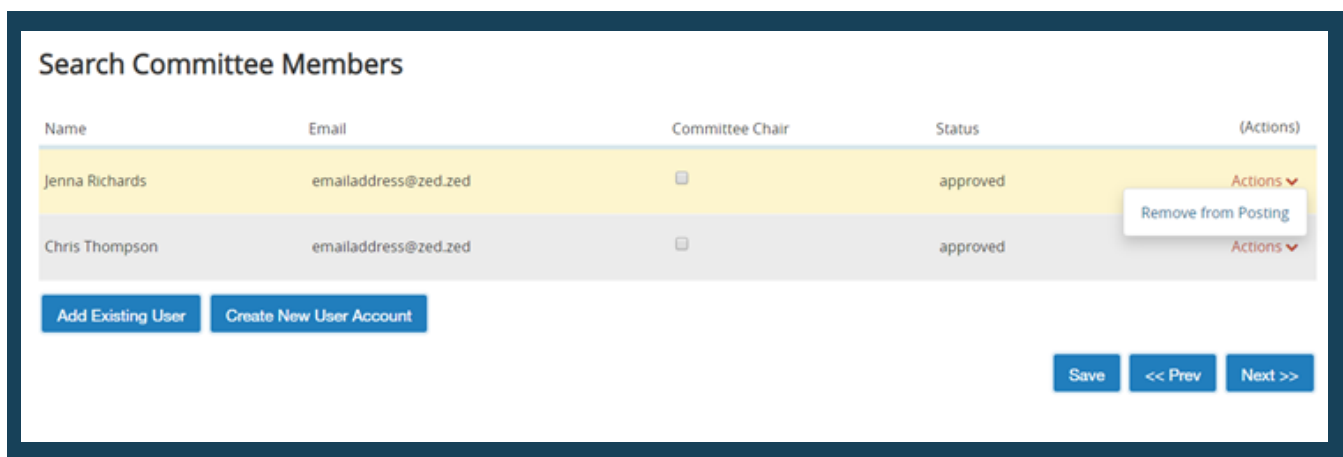
Complete all the required fields and select **Add Member to Search Committee**. It is recommend to use the employee's AU email address and username (email prefix) for those corresponding fields.



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.

Posting: Administrator, Academic Programs (Non-Faculty)

Edit

Current Status: Initiator

Position Type: **Non-Faculty**

Department: **Biological Sciences**
(136200)

Created by: Jenna Richards

Owner: Initiator

Take Action On Posting

★ See how Posting looks to Applicant

Print Preview (Applicant View)

Print Preview

Add to Watch List

Summary

History

Settings

Applicants

Reports

Hiring Proposals

Please review the details of the Posting below. Page titles prefaced with an X and highlighted in RED have errors or missing data. Page titles prefaced with a checkmark and highlighted in GREEN have validated successfully. Once all pages have validated successfully, you may take action on the Posting using the actions listed in the **Workflow actions for this posting** pane.

✔ Position Details

Edit

Position Information

| | |
|---------------------------|---------------------|
| Requisition Number | S011P |
| Internal Search Requested | No |
| Home Org Name | Biological Sciences |

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

Initiator View:

Take Action On Posting

Keep working on this Posting

WORKFLOW ACTIONS

Submit for Review (move to HR Liaison)

Add to Watch List

HR Liaison View:

Take Action On Hiring Proposal

Keep working on this Hiring Proposal

WORKFLOW ACTIONS

Return (move to Initiator)

Select (move to Compensation)

Select (move to Research Security)

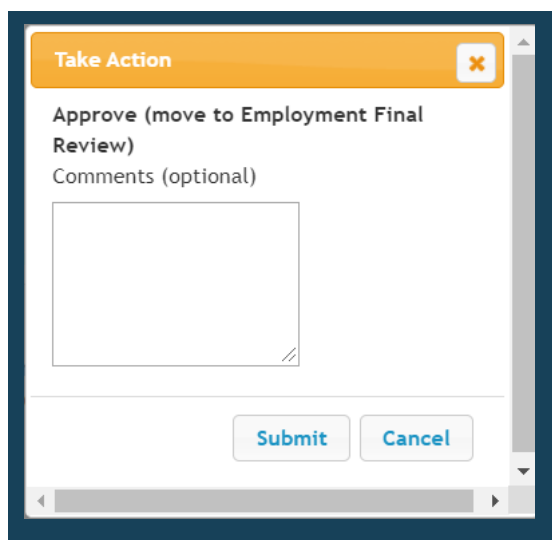
Select (move to OIP)

OIT (move to OIT)

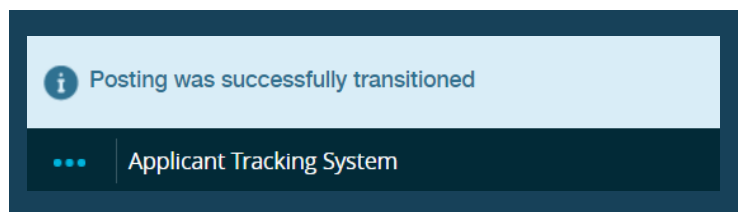
Users who have created postings as an Initiator must send the posting to an HR Liaison user role in order to send the posting to other user roles for review.

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**.

A screenshot of a 'Take Action' dialog box. The title bar is orange with the text 'Take Action' and a close button (X). The main content area has a white background. It contains the text 'Approve (move to Employment Final Review)' and 'Comments (optional)' above a large, empty text input field. At the bottom, there are two buttons: 'Submit' and 'Cancel'.

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

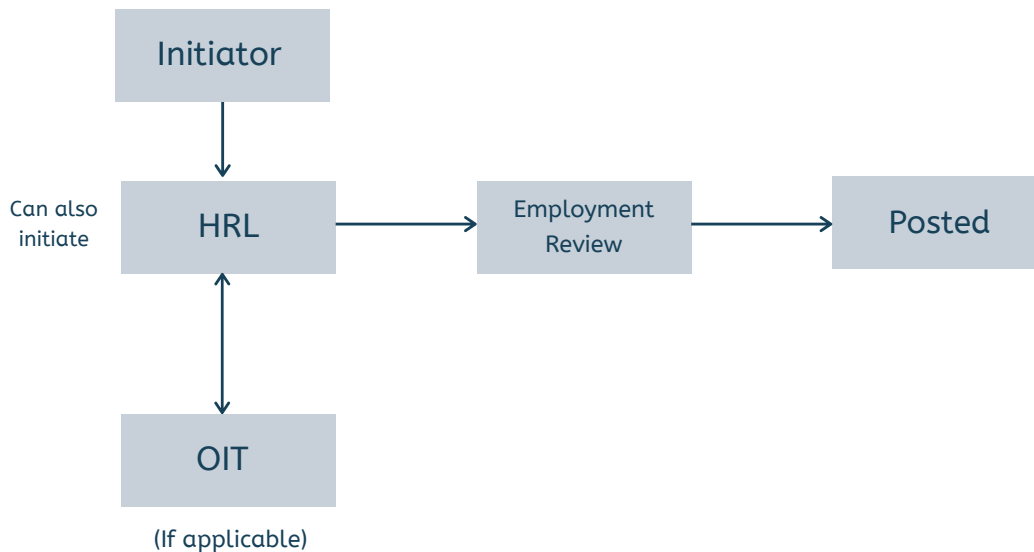


If the posting was NOT successfully transitioned, the following banner will appear at the top of the screen. The items that need attention will be listed in the banner message.

! "FLSA Status" is required and All required fields must be set before transitioning.

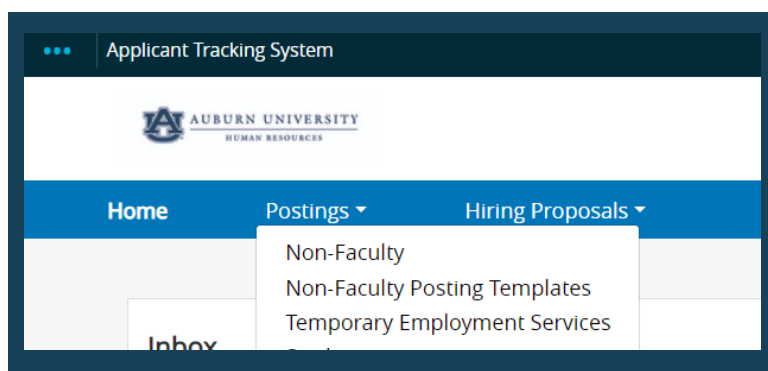
Applicant Tracking System

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.

Non-Faculty Postings

Create New Posting

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

Saved Searches

Search

More Search Options


Postings w/Posted Close Date

"Postings w/Posted Close Date" 16 Delete this search? Selected records 0 Clear selection?

Actions

| | 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.



Posting: Specialist, Information Technology (Non-Faculty)

Edit

Current Status: Closed

Position Type: Non-Faculty
Department: President's Office
(100000)

Created by: Chris Thompson
Owner: Employment

Summary

History

Settings

Applicants

Reports

Hiring Proposals

Select the name of the applicant you want to view.

| All Applicants | | | | | | |
|---|---------------------|----------------------|-----------|----------------|---------------------------|-------------------------------|
| "All Applicants" 2 Delete this search? Selected records 0 Clear selection? Actions | | | | | | |
| | Applicant Last Name | Applicant First Name | Documents | Posting Number | Workflow State (Internal) | Application Date |
| <input type="checkbox"/> | Thompson | Chris | | S003P | Forwarded to Department | November 12, 2019 at 10:38 AM |
| <input type="checkbox"/> | Bruce | Amy | | S003P | Forwarded to Department | November 12, 2019 at 11:40 AM |

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

Job application: Chris Thompson (Non-Faculty)

Current Status: Forwarded to Department
Application form: Application

Full name: Chris Thompson
Address:
104 Greene Hall
Auburn, AL 36849
Username: humanresources
Email: emailaddress@zed.zed
Phone (Primary): 334-844-3674
Phone (Secondary):
Position Type: Non-Faculty
Department: President's Office (100000)

Created by: Chris Thompson
Owner: Initiator

Take Action On Job Application

- ★ View Posting Applied To
- ★ Preview Application
- ★ Evaluate Applicant
- ✎ Edit Application
- 🔄 Reactivate

Summary Documents Recommendations (0 of 3) Supporting Documents History Reports

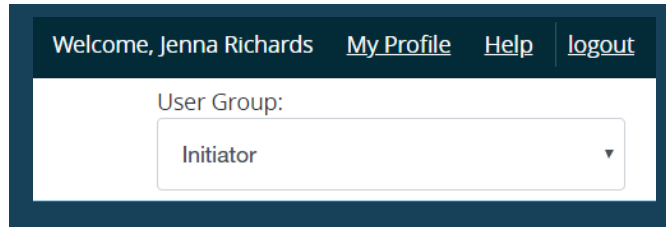
At the bottom of the application, there is a feature that will combine the application and attached documents into one PDF document. To view, select Combined Document.

| PDF Documents | |
|-------------------|----------|
| Document Type | Actions |
| Application | View |
| Combined Document | Generate |

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.



A screenshot of a user interface showing a dark blue header bar. On the left, it says 'Welcome, Jenna Richards'. On the right, there are links for 'My Profile', 'Help', and 'logout'. Below the header, there is a white box with the text 'User Group:' followed by a dropdown menu. The dropdown menu is open, showing 'Initiator' as the selected option.

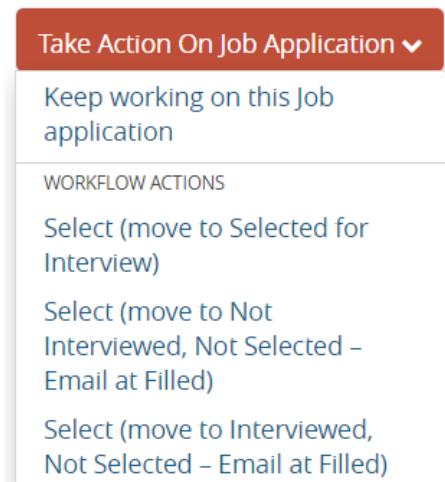
Users who's primary user group is Initiator will not need to take any action in order to have the ability to change application statuses.

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.

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



A screenshot of a dropdown menu titled 'Take Action On Job Application' with a downward arrow. The menu is open, showing several options. The first option is 'Keep working on this Job application'. Below this, there is a section header 'WORKFLOW ACTIONS'. Under this section, there are three options: 'Select (move to Selected for Interview)', 'Select (move to Not Interviewed, Not Selected – Email at Filled)', and 'Select (move to Interviewed, Not Selected – Email at Filled)'.

Take Action

Select (move to Not Interviewed, Not Selected - Email at Filled)

Reason (required)

Less competitive based on work experience

Submit Cancel

Take Action

Select (move to Interviewed, Not Selected - Email at Filled)

Reason (required)

Less competitive based on work experience

Explanation:

Submit Cancel

CHANGING THE STATUS OF MULTIPLE APPLICATIONS

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

All Applicants2

Selected records2

Clear selection?

| | Applicant Last Name | Applicant First Name | Documents | Posting Number | Workflow State (Internal) | Application Date |
|-------------------------------------|---------------------|----------------------|-----------|----------------|---------------------------|-------------------------------|
| <input checked="" type="checkbox"/> | Thompson | Chris | | S003P | Selected for Interview | November 12, 2019 at 10:38 AM |
| <input checked="" type="checkbox"/> | Bruce | Amy | | S003P | Forwarded to Department | November 12, 2019 at 11:40 AM |

Actions

GENERAL

Evaluate Applicants

Download Applicants Evaluations

Review Screening Question Answers

Download Screening Question Answers

Export results

BULK

Move in Workflow

Download Applications as PDF

Create Document PDF per Applicant

PeopleAdmin

Better Talent. Better Future.

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Last refresh: 12/16/2019 11:55 AM

Help

https://auburnu-sb.peopleadmin.com/hr/postings/24/job_applications/edit_transitions

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

Change for all applicants
Select a workflow state...

| Applicant | Current State | New State | Reason |
|----------------|-------------------------|----------------------------|--------|
| Chris Thompson | Forwarded to Department | Select a workflow state... | |
| Amy Bruce | Forwarded to Department | Select a workflow state... | |

Save changes
Cancel

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 automated 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**.

- ★ View Posting Applied To
- ★ Preview Application
- 📄 View Completed Hiring Proposal
- ➕ Start ATS Hiring Proposal

Starting ATS Hiring Proposal

Applicant: Donald Duck

Posting: Specialist, Info Tech

[Start ATS Hiring Proposal](#) or [Cancel](#)

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

| Position Details | |
|-------------------|--|
| * Position Title | <input type="text" value="Specialist, Info Tech"/> |
| * Position Number | <input type="text" value="145454"/> |
| * Reviewed By | <input type="text" value="Jenna Richards"/> |

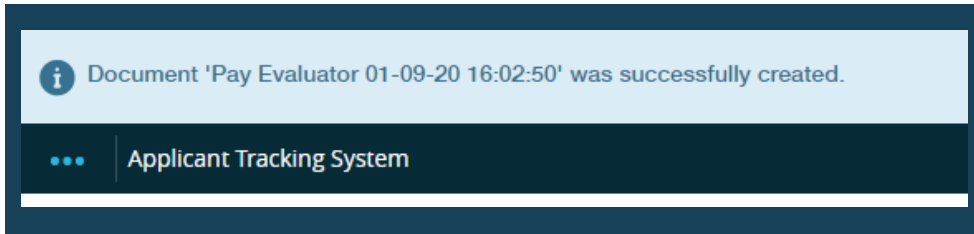
On the Hiring Documents tab, the Initiator or the Human Resources Liaison user groups should attach the pay evaluator in the correct document location. To attach a document, hover over the **Actions** text and select **Upload New**.

The screenshot shows the 'Hiring Proposal Documents' interface. On the left, a list of document types is displayed: 'W-4 Tax Form', 'A-4 Tax Form', 'Personal Data Form', 'Pay Evaluator', 'Pay Evaluator - Copy Signed by Compensation', and 'Pay Evaluator - Fully Signed Copy'. On the right, a detailed view of the 'Pay Evaluator' document is shown. It includes a header with 'Actions' and a dropdown menu. The dropdown menu is open, showing options: 'Upload New', 'Create New', 'Choose Existing', and 'Add by URL'. Below the dropdown, there are 'Save' and '<< Prev' buttons.

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

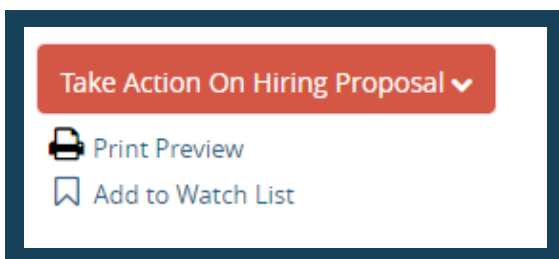
The screenshot shows the 'Upload a Pay Evaluator' form. It has a title 'Upload a Pay Evaluator' and a subtitle 'To upload your document, provide a name and description of the document'. The form includes a 'Name' field with the value 'Pay Evaluator 01-09-20', a 'Description' field, and a 'File to upload' section with a 'Choose File' button and the text 'No file chosen'. There is also a 'Link to Online Pay Evaluator' field and a 'Submit' button at the bottom.

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.

Take Action On Hiring Proposal ▾

Keep working on this Hiring Proposal

WORKFLOW ACTIONS

Cancel (move to Canceled)

Select (move to HRL Review)

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

Take Action On Hiring Proposal ▾

Keep working on this Hiring Proposal

WORKFLOW ACTIONS

Cancel (move to Canceled)

Return (move to Initiator)

Select (move to Compensation)

Select (move to Research Security)

Select (move to OIP)

OIT (move to OIT)

Select **Submit**

Take Action ✕

Select (move to Compensation)

Comments (optional)

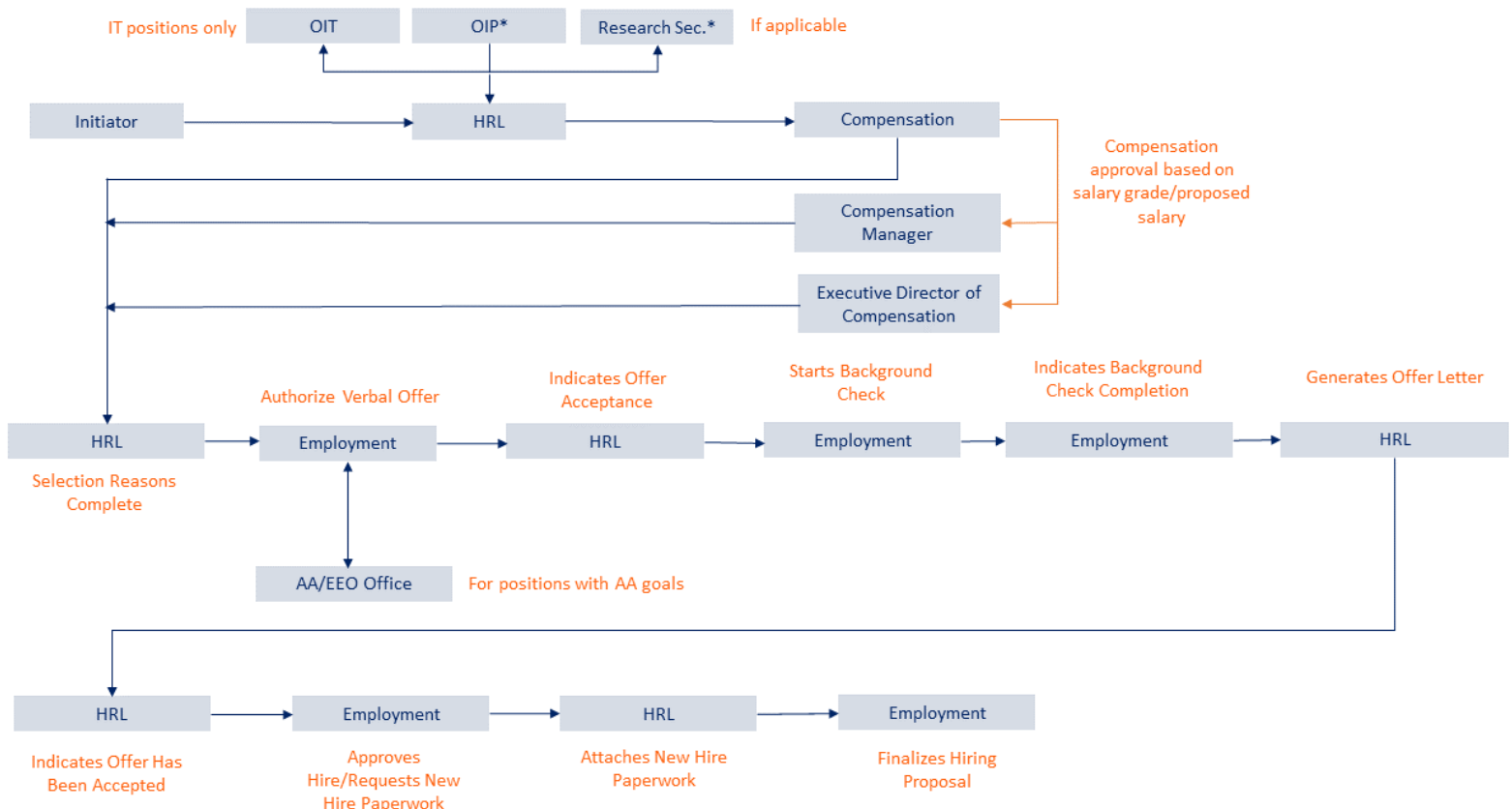
Submit Cancel

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**.



ATS Hiring Proposal: Donald Duck (Non-Faculty) [Edit](#)

Current Status: Background Check Complete/Offer Letter Authorized

Position Type: **Non-Faculty**
Department: **President's Office**
(100000)
Applicant: Donald Duck
Posting: Specialist, Info Tech

Created by: Jenna Richards
Owner: HR Liaison

Summary

History


Settings

Reports


Offer Letter

Status: Offer Letter in Draft

[Send Offer Letter](#)



[Edit Offer Letter](#)



Dear [redacted],

I am pleased to extend you an offer of employment for the Specialist, Info Tech position in [redacted]. This offer includes a salary of [redacted] paid on a [redacted] basis. This offer is for a **continuing-term/limited term** appointment and is subject to all applicable rules, regulations and policies of the University.

This offer of employment is also contingent upon verification of the appropriate identity and employment eligibility documentation on the Form I-9, as required by [redacted]

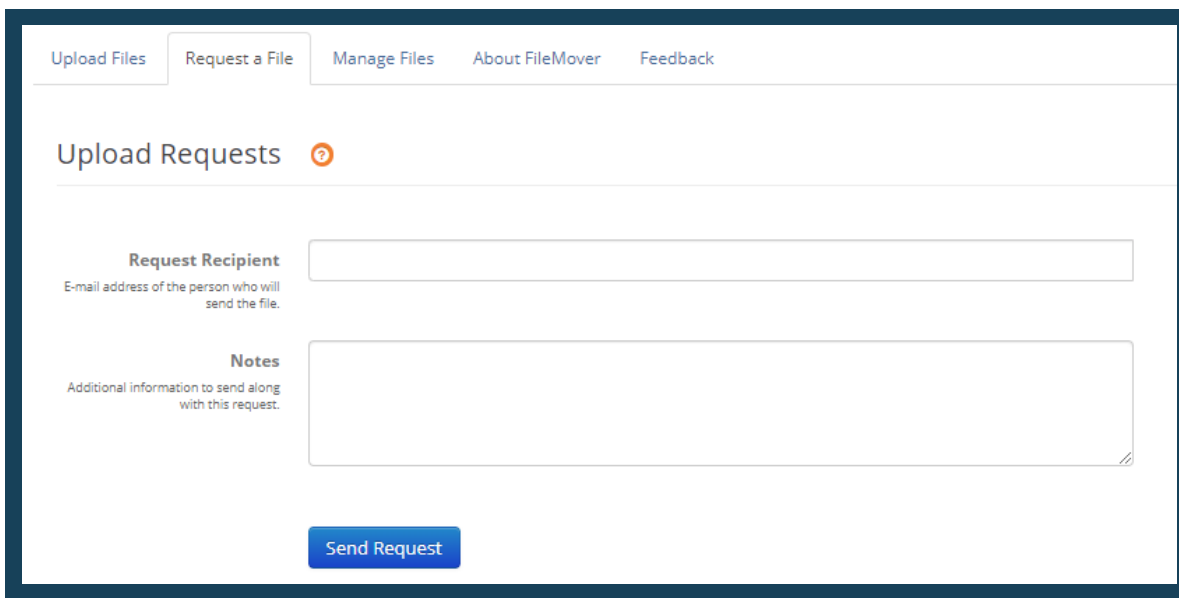
Once the offer letter has been signed, the digital signature will appear below the offer letter. Once signed, the Human Resources Liaison will route the hiring proposal to Employment or TES, indicating that the offer letter has been signed. The workflow state will be Offer Letter Signed/Offer Accepted.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

Signed: Donald Duck
Submitted on: 01/10/2020 03:14 PM by Donald Duck via Digital Signature

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.



The screenshot shows the 'Request a File' tab of the Auburn University File Mover interface. At the top, there are navigation links: 'Upload Files', 'Request a File' (active), 'Manage Files', 'About FileMover', and 'Feedback'. Below these is a section titled 'Upload Requests' with a help icon. The form contains two main input fields: 'Request Recipient' with a subtext 'E-mail address of the person who will send the file.' and 'Notes' with a subtext 'Additional information to send along with this request.' A blue 'Send Request' button is located at the bottom of the form.

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:

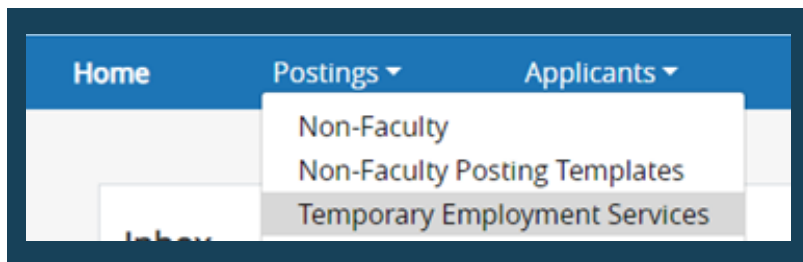
https://www.auburn.edu/administration/human_resources/forms/pdf_2015.pdf#Personal%20Data%20Form

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

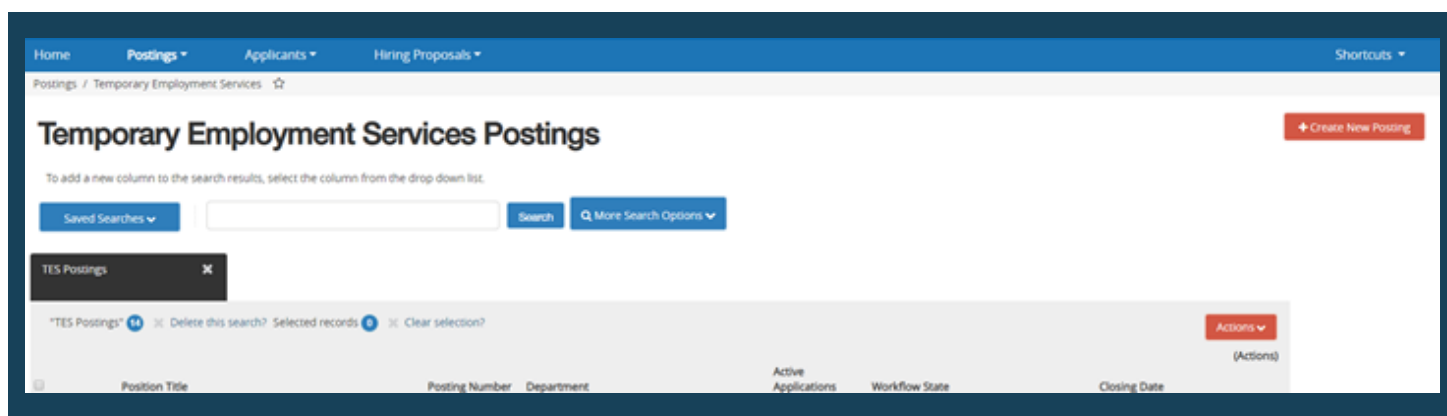
The Employment team will create the Banner ID and Username in JumpStart before finalizing the hiring proposal, so that accesses may be granted early in the process.

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**.

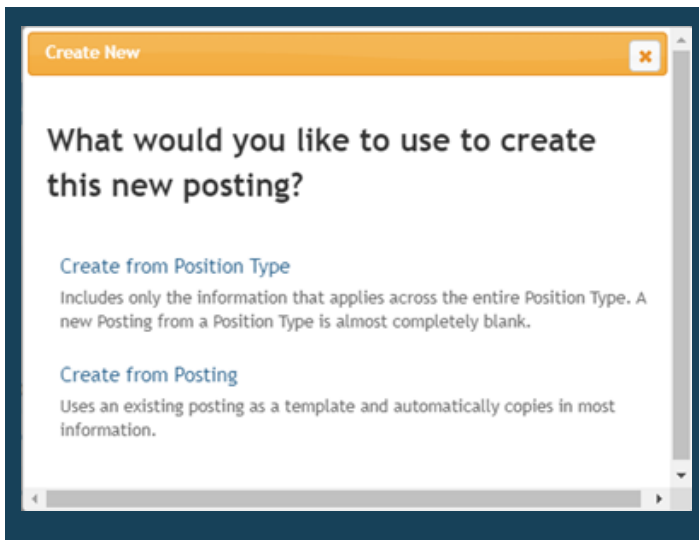


There are a few options for creating postings.

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**.

A screenshot of the 'New Posting' form. The title bar says 'New Posting' and there is a 'Create New Posting' button. The form has a section for 'Required Information' with fields for 'Position Title' (filled with 'TES Admin Support, Human Resources'), 'Division' (filled with 'VP for Bus-Fin & CFO (113)'), and 'Department' (filled with 'Human Resources (101061)'). There is also a section for 'Online Applications' with a checkbox for 'Accept online applications?' (checked) and a text area for 'Special offline application instructions'.

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.

Editing Posting

Position Details

[Check spelling](#)

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

Position Information

Requisition Number

Recruitment Reason

Recruitment Type Please select *
This field is required.

Home Org Name Human Resources

Home Org Number This field is required.

Division Name VP for Bus-Fin & CFO

Check Distribution This field is required.

Location Number This field is required.

Position Title TES Admin Support, Human Resources

Estimated Hours Per Week This field is required.

Save **Next >>**

Editing Posting

Position Details

Advertising and Budget...

Posting Contacts

✓ Documents Needed to Apply

✓ Posting Documents

✓ Search Committee

Summary

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

The screenshot shows the 'Editing Posting' interface with a sidebar on the left containing links: Position Details, Budget Details, Posting Contacts, Documents Needed to Apply (highlighted), Guest User, Supplemental Questions, and Summary. The main content area is titled 'Documents Needed to Apply' and includes 'Save', '<< Prev', and 'Next >>' buttons. Below the title is a table with columns: Order, Name, Not Used, Optional, and Required. The table contains two rows: 1 Resume and 2 Cover Letter. Both rows have an asterisk in the 'Not Used' column and empty circles in the 'Optional' and 'Required' columns.

| Order | Name | Not Used | Optional | Required |
|-------|--------------|----------|----------|----------|
| 1 | Resume | * | ○ | ○ |
| 2 | Cover Letter | * | ○ | ○ |

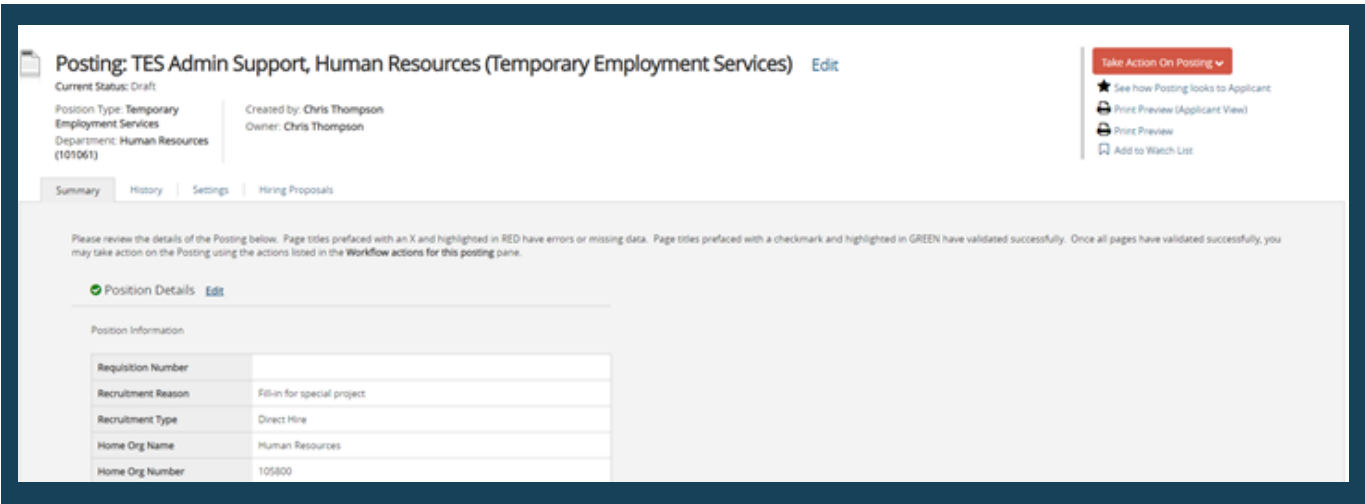
Guest Users are only for non-users whom will need to be able to review applications (i.e. Supervisors who are not an initiator or HRL). To create a Guest User, simply click on **Create Guest User Account**. A username and password will be automatically generated for you. Add email address(es) of recipients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

The screenshot shows the 'Editing Posting' interface with the 'Guest User' section selected in the sidebar. The main content area is titled 'Guest User' and includes 'Save', '<< Prev', and 'Next >>' buttons. Below the title is a text area with instructions: 'Click on the Create Guest User Account button. The system will automatically generate a Guest Username. You may update the password if needed.' and 'You can also notify the members of the review committee by adding their email address in the Email Address of Guest User Recipients. Each email address must be on a separate line. Once you have added all of the email addresses, click on the Update Guest User Recipient List to notify the review committee users.' Below this is a section for 'Guest User Credentials' with fields for 'Username' (containing 'gu0711') and 'Password' (containing 'AL07ig'), and an 'Update Password' button. At the bottom is a field for 'Email Addresses of Guest User Recipients' with the instruction 'Email addresses (one per line)'.

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

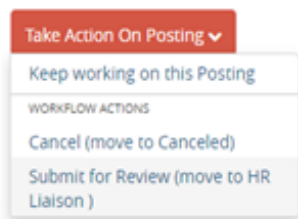
SUMMARY PAGE AND SUBMITTING POSTING FOR REVIEW

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.

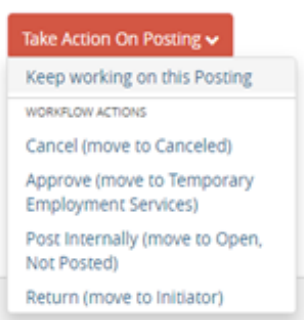


When users are ready to submit the posting for review, hover over the orange button that says **Take Action on Posting**.

Initiator View:

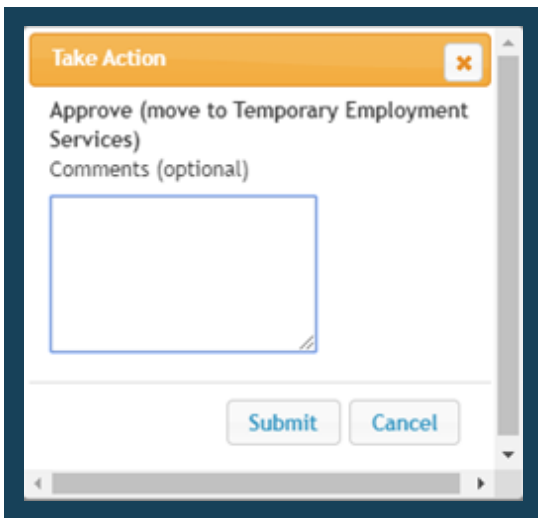


HR Liaison View:

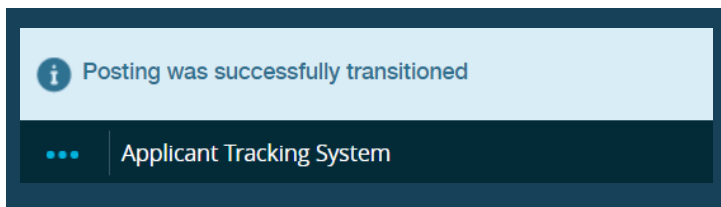


Users who have created postings as an Initiator must send the posting to an HR Liaison user role in order to send the posting to other user roles for review.

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**.

A screenshot of a 'Take Action' dialog box. The title bar is orange with a close button. The main area is white and contains the text 'Approve (move to Temporary Employment Services)' and 'Comments (optional)' above a large empty text box. At the bottom are 'Submit' and 'Cancel' buttons.

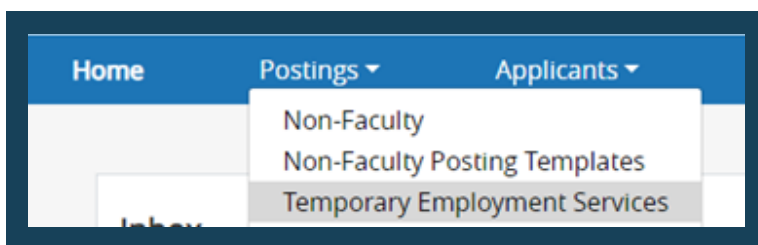
If the posting was successfully transitioned, the following banner will appear at the top of the screen.



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.

Temporary Employment Services Postings

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

Saved Searches ▼

Search

More Search Options ▼

TES Postings

"TES Postings" 15 Delete this search? Selected records 0 Clear selection?

Actions ▼

(Actions)

| | Position Title | Posting Number | Department | Active Applications | Workflow State | Closing Date | |
|--------------------------|--|----------------|--------------------------------------|---------------------|-------------------------------|--------------|-----------|
| <input type="checkbox"/> | Temp Test | | President's Office (100000) | 2 | Posted | 04/24/2020 | Actions ▼ |
| <input type="checkbox"/> | TES Outreach Admin | | President's Office (100000) | 4 | Posted | | Actions ▼ |
| <input type="checkbox"/> | Test | | President's Office (100000) | 0 | Draft | | Actions ▼ |
| <input type="checkbox"/> | TES Admin - Office of International Programs | | President's Office (100000) | 1 | Open, Not Posted | 12/10/2019 | Actions ▼ |
| <input type="checkbox"/> | TES Test | | Black Belt Research Ext Ctr (302251) | 0 | Draft | | Actions ▼ |
| <input type="checkbox"/> | Specialist | | AES Administration (300000) | 0 | Temporary Employment Services | | Actions ▼ |

Locate and click on the Applicants tab.

Posting: TES Admin Support, Human Resources (Temporary Employment Services) Edit

Current Status: Open, Not Posted

This posting is not available to applicants via search results but may be accessed directly at <http://auburnu-sb.peopleadmin.com/postings/4916>

Position Type: Temporary Employment Services
Department: Human Resources (101061)

Created by: Chris Thompson
Owner: Temporary Employment Services

Take Action On Posting ▼

- View Guest User Credentials
- See how Posting looks to Applicant
- Print Preview (Applicant View)
- Print Preview
- Add to Watch List

Summary History Settings Applicants Reports Hiring Proposals

Please review the details of the Posting below. Page titles prefaced with an X and highlighted in RED have errors or missing data. Page titles prefaced with a checkmark and highlighted in GREEN have validated successfully. Once all pages have validated successfully, you may take action on the Posting using the actions listed in the Workflow actions for this posting pane.

Position Details Edit

Position Information

| | |
|--------------------|-----------------------------|
| Requisition Number | |
| Recruitment Reason | Fill-in for special project |
| Recruitment Type | Direct Hire |
| Home Org Name | Human Resources |
| Home Org Number | 105800 |

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

Posting: TES Admin Support, Human Resources (Temporary Employment Services) Edit

Current Status: Open, Not Posted

This posting is not available to applicants via search results but may be accessed directly at <http://auburnu-sb.peopleadmin.com/postings/4916>

Position Type: Temporary Employment Services
Department: Human Resources (101061)

Created by: Chris Thompson
Owner: Temporary Employment Services

Take Action On Posting ▼

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

Summary | History | Settings | Applicants | Reports | Hiring Proposals

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

Saved Searches ▼ Search More Search Options ▼

Applicants ✕

"Applicants" ⓘ Delete this search? Selected records ⓘ Clear selection?

| Applicant Last Name | Applicant First Name | Documents | Posting Number | Workflow State (Internal) | Application Date | Actions |
|---------------------|----------------------|-----------|----------------|---------------------------|------------------------------|-----------|
| Bruce | Walker | | | Recommend for Hire | January 10, 2020 at 12:41 PM | Actions ▼ |

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

- ★ View Posting Applied To
- ★ Preview Application
- + Start ATS Hiring Proposal

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

Starting ATS Hiring Proposal

Applicant: Larry Test

Posting: TES Admin Support, Human Resources

Start ATS Hiring Proposal or Cancel

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

Hiring Proposal Information

Hiring Proposal Number

- * Finalized Pay Rate Per Hour This field is required.
- * Hire Date This field is required.
- * End Date This field is required.
- * Position Type This field is required.

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

ATS Hiring Proposal: Larry Test (Temporary Employment Services) [Edit](#)

Current Status: Draft

Position Type: Temporary
Employment Services
Department: Human Resources (101061)
Applicant: Larry Test
Posting: TES Admin Support, Human Resources

Created by: Chris Thompson
Owner: Chris Thompson

[Take Action On Hiring Proposal](#)
[Print Preview](#)
[Add to Watch List](#)

[Summary](#) [History](#) [Settings](#) [Reports](#)

✔ Hiring Proposal [Edit](#)

Selected Candidate

| | |
|-------------|----------------------|
| First Name | Larry |
| Middle Name | Test |
| Last Name | Test |
| Address1 | 1542 East Ridge Lane |

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

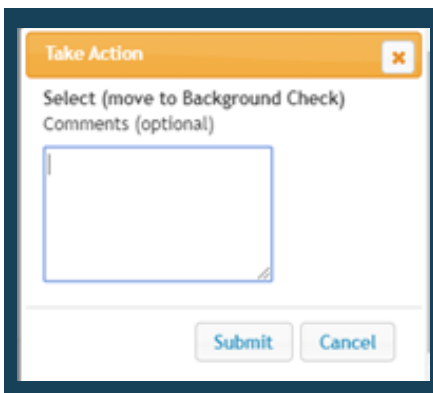
Initiator View:



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.

A screenshot of a "Take Action" confirmation dialog box. The title bar is orange with the text "Take Action" and a close button (X). The main content area has a light gray background and contains the text "Select (move to Background Check)" and "Comments (optional)" above a large, empty text input field. At the bottom, there are two buttons: "Submit" and "Cancel".

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