BUFFALO STATE
The State University of New York

PeopleAdmin 7 User Manual

Posting Guide

Faculty / Professionals and Graduate Assistants

Human Resource Management

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1 OVERVIEW

Buffalo State University uses an applicant tracking system for recruitment. The web-based system allows job seekers to apply for jobs online and allows hiring departments to manage applicants and the search process (includes the job posting, recruitment reports, and appointment form).

Human Resource Management (HRM) created this guide to assist you with navigating the applicant tracking system. If you have any search procedure questions or require technical assistance, please contact us at 878-4822.

Additional applicant tracking system resources are available at https://jobs.buffalostate.edu/hr.

Position Release Form

Before creating a posting for any ***personal service funded*** position, you must have authorization to fill a position via an approved Position Release Form (available from the Financial Management Office). Once the Position Release Form is approved, HRM will contact the department head/hiring manager to schedule training on the applicant tracking system. If the department head/hiring manager has previously used the applicant tracking system, he/she may proceed with creating a posting.

Note, graduate assistant and part-time faculty positions are temporary service funded and do not require a Position Release Form. Classified postings are created by HRM.

1.1 WHAT'S NEW WITH PEOPLEADMIN 7

- Action links appear at the top navigation bar instead of the side page.
- Action bars (orange) to take action on postings, applicants, and Hiring Proposals.
- Error and user messages appear at the very top of the screen.
- Spell check.
- Mobile friendly design for applicants and internal users.
- Applicants may apply via resume parsing, LinkedIn or Chronicle Vitae.
- Unique posting forms and workflows for each position type.
- Online Help resources.
- Multiple Hiring Proposals (aka Appointment Forms) may be initiated from one posting.
- Background check requirement included in workflows.
- Internet browser back button is fully functional.
- Applicants receive e-mail confirmation of application submission in addition to screen notice.
- Applicant Interest Cards - applicants may subscribe to receive emails from the system when a job is posted in the category they selected.
- Able to search and narrow applicants according to answers to any supplemental questions.
- Reference letter requests – Able to configure automated reference letter requests on a posting-by-posting basis when applicants reach a specified status.
- Evaluative criteria assessments by search committee chair and members.

2 LOG IN AND INTERFACE

2.1 LOG IN

Open a web browser (Chrome or Firefox preferred) and enter https://jobs.buffalostate.edu/hr, log in using your Buffalo State NT username and password. The system will timeout after 60 minutes of inactivity.

2.2 HOME PAGE

The **applicant tracking system** home page includes: your user type/group, main menu (tabs for Postings and Hiring Proposals), shortcuts (to specific actions), links (to guides and resources), inbox, and watch list. The inbox and watch list can be accessed on your home page. *Note, we cannot change the columns in the inbox or watch list.*

User Types (Groups)

The applicant tracking system is a role-based system and your user type determines what you are able to view and process as a contributor to the recruitment process. Some employees may have multiple user types within the system, e.g., Department Head/Chair and Search Chair. Be sure you are in the appropriate user type for the action needed.

To change your user type, select the appropriate user from the dropdown menu on the upper right hand corner of the screen. The screen will automatically refresh and note a message at the very top that your user type changed.

Inbox

The inbox is a notification area that displays any items that you or those in your user group need to take action on. A document will not continue in the workflow until you take an action (approve or return). There are two tabs: Postings and Hiring Proposals (aka Appointment Forms). **Items will disappear from the list when there are no more actions to complete.**

Watch List

The watch list is an optional tool that can be used to monitor the current state and owner of the requests that you have flagged after completing an action. To remove an item from your watch list:

1. Check the box next to the item.
2. Select **Unwatch Postings**.

2.3 YOUR PROFILE

Human Resource Management configures a profile for each user of the system. To customize your profile, follow the instructions as noted.

Access Your Profile

1. Open a web browser (Chrome or Firefox preferred) and enter https://jobs.buffalostate.edu/hr, log in using your Buffalo State NT username and password.
2. Click **My Profile**. This page shows your name, e-mail, department, and group(s).

Update E-mail Preferences

1. Click **My Profile**.
2. Click **Manage E-mails**.
3. Check **Opt Out** for any item you no longer wish to receive e-mail notifications.
4. Click **Update System E-mail Options**.

Request a New Group Assignment

1. Click **My Profile**.
2. Hover over **Take Action on User** and click **Request Group Change**.
3. Find the new group and click **Request New Group**.
4. Select the department or unit for the request.
5. Click **Request Group Assignment**. Human Resource Management will review the request and follow up with you.

2.4 SEARCH TOOL

Every page in the system that presents a list of items may be searched. The search tool allows users to develop real-time reporting targeted to their needs and then to export the results to Excel.

- **Keyword Search** – type the keyword in the search field and Search. Text is not case sensitive. Searches can be customized to your needs or you may use searches that have been saved by HRM for the use of specified user groups.
- **Add Column** – offers a dropdown list of all fields relevant to your search – e.g., fields in an application, fields in a posting. You may also remove a column(s).
- Remainder of search criteria – these are filters and will vary with the kind of search – e.g., applicants, posting. **Ctrl** allows you to select more than one for filter.
- Appearance of data – sort data or move the columns by hovering over the column heading. If you change a column, a new search has been created and you must save it if you wish to view it again.
- Saved Search – searches you create or modify are created for your personal use. You will be prompted with **Save this search?** and to name it. All saved searches, whether created as a personal search or created by HRM, that are related to the list will appear in **Open Saved Search**.
- To remove or delete a saved search, select the 'X".
- Exporting Results to Excel – Hover over **Action** button and select **Export Results**.
- Additional Help – for additional assistance in creating, modifying, and saving searches, go to **Home** and select **Help**. Select **General Information** from the menu and choose **Search and Saving Searches**.

3 Create a Posting

1. Open a web browser (Chrome or Firefox preferred) and enter https://jobs.buffalostate.edu/hr, log in using your Buffalo State NT username and password.

   In the upper right-hand corner, be sure it displays your **user type** (e.g., Department Head/Chair, Search Chair, etc. and not employee). If not, toggle the dropdown menu and update as necessary. The system will automatically refresh. The upper left-hand corner will display **Hire**.

2. On the Home page, hover over **Postings** and select the position type. Or, select a Shortcut. Note, HRM creates Classified postings.
3. Select **Create New Posting** button.
4. A pop up window will appear, select **Create from Posting Template**.
5. Search or scroll to find your budget title (reference Position Release Form if applicable).
6. To the right of the budget title, hover over Actions and select **Create From**. If you will be using the **reference collection** tool, please populate the references fields (see Reference Collection) **or** return to this section before forwarding the posting to the next approver.
7. Check the appropriate **Interest Card** category.
8. Select **Create New Posting**.

3.1 Position Details

Notes

- ✓ Fields with an asterisk (*) are required.
- ✓ Utilize spell check tool.
- ✓ Select **Save & Continue** on every page to ensure your work is saved.
- ✓ Select **Save & Continue** to navigate through the pages.
- ✓ Error messages are located at the top of the screen.

Position Information

- Posting date
- Department
- Line number
- Local title
- FTE
- Advertised salary (optional, field is viewable to applicants)
- Department website

Department Information

- Department Head/Chair

Recruitment Plan

- Search committee chair
- Search committee members
- Type of search to be conducted
- Brief job description

- Required qualifications
- Preferred qualifications
- Anticipated date of hire
- Application deadline date OR open until filled
- Special instructions to applicants (optional)
- Contact person, e-mail, and fax (optional and is viewable to applicants)
- Print and electronic advertising plan
- Quick link (you may use this in your advertising)
- Select **Save**

Spell Check

To use the spell check tool, click check spelling. Unrecognized text will appear in red and underlined. Select the text and edit as desired or select the checkmark with ok. When finished, select resume editing.

3.2 Reference Collection (Optional)

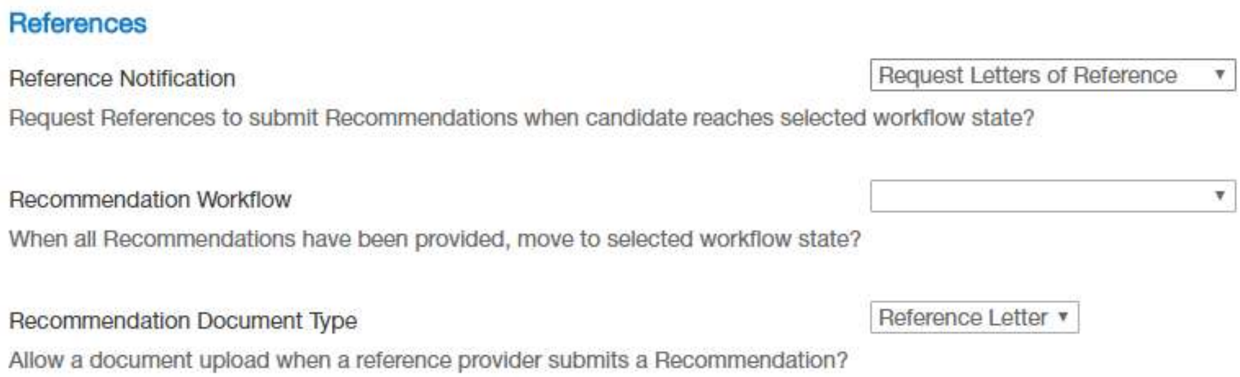
The reference collection tool allows for the request and collection of **letters of recommendation** directly through the secure portal, at a predetermined applicant status. Reference providers electronically complete a form that becomes part of the applicant's file for a specific posting. E-mails will be automatically sent to the reference provider when an applicant's status changes to a specified status. If this option is selected, applicants will be required to submit an e-mail address for each reference provider and they will not be allowed to complete their application until the MINIMUM number of reference provider e-mails is entered.

Note, if you wish to use this tool, it must be configured at this time (before the job is posted). This tool may be used in addition to requesting the applicant to provide the names and contact information for 3 professional references or instead of that request.

Configuration and Process

1. Under Posting Details, check **Accept References** box when creating a new posting. Once the Accept References box is checked, you will see reference options:
    - Reference Notification – This option will determine the status at which the applicant reference(s) will be contacted to provide recommendations on the applicant. It may also be left blank if you wish to send out reference request e-mails manually. To send out the system e-mails manually, the Search Chair must navigate to the posting and click the appropriate applicant and select the **Send** button next to each reference listed. Once the e-mails have been sent, the Send button will display as Resend. The Search Chair may select **Resend** if a reference provider requests that the e-mail be sent out again. The **Notified** column indicates when e-mails were sent to the reference provider.
    - Recommendation Workflow – **Always leave blank**. No change in workflow is necessary.
    - Recommendation Document Type – This option will determine whether or not the reference provider uploads a document or responds to any questions on a form.

If you opt to use the reference collection tool, this is a view of the recommended set up:



2. Under Reference Collection, you will see the following options:
   - Will this position accept reference letters? Select **Yes**.
   - Minimum/Maximum Requests – This will determine how many reference contacts the applicant is required to submit with their application. Set a minimum and maximum number of choices.
   - Assigned Cutoff Date – The date indicated will determine when the system will disable the link for the referee to respond. A minimum of three (3) business days is recommended. This field **may also be left blank** which will allow the reference link to remain active until the reference provider responds. (This does not impact the posting close date, if noted.)
   - E-mail Reminder Days – Set as desired but keep in mind your search timeframe.
   - Instructions to Reference Provider (optional) – Complete this field if you wish to solicit specific information from the reference provider.
3. Continue the workflow process and route the posting for approval. When the job is posted, the application will ask the applicant for references (optional/required and minimum/maximum) based on the configurations.
4. When the applicant reaches the specified status, an e-mail will be sent out to the applicant's references. The references will fill out a recommendation form and/or attach a recommendation letter within the noted time frame (if a cutoff date was noted).
5. The applicant tab will be updated with the information and will be available for review.

Providing a Recommendation Process

Once the reference provider receives the e-mail, they will give recommendations about the applicant and will be prompted to send the response back to the Search Chair.

1. At the specified/designated applicant status, an automated e-mail will be generated to the reference. In the e-mail, the reference will be provided with a unique link to follow.
2. On the website, the Applicant Information will be located on the top of the page. Next, there are required fields for the reference provider to complete, such as name and contact information.
3. Next, the recommendation section must be completed. Questions to be answered by the reference provider include:
   - Do you decline to provide a referral for this applicant?

- How do you know the applicant?
- How long have you known the applicant?
- Additional comments

4. If reference letter was selected from the Recommendation Document type, the reference provider will be prompted to upload a recommendation letter. This document will be automatically converted to a PDF and attached to the applicant's information within the posting.
5. Once the reference provider has submitted their recommendation through the reference portal, they will receive a confirmation e-mail from the system. Applicants will also receive e-mail notices that their reference(s) completed the request.

Viewing Reference Provider's Recommendation

After the applicant's references are received, Search Chairs are able to review the information provided:

1. Navigate to the posting and click on Applicants. Click the appropriate Applicant.
2. While viewing the Applicant Information you will see the following tabs: Summary, Recommendations followed by two numbers (for example 1 of 1), and History. Click the Recommendations tab.
3. You will see Reference Requests if an e-mail has been sent out to a reference but either they have not yet responded or there was an issue sending an e-mail. The Notified column indicates when e-mails were sent to the reference provider. The Search Chair may select **Resend** to send the e-mail again. Below Reference Requests is where you will see completed recommendations.

3.3 Supplemental Questions (Optional)

Supplemental questions can assist with screening and evaluating the applicant pool. It is a way to determine if an applicant meets required qualifications by having answered a question(s) when applying for a job. Certain answers to questions can be made 'disqualifying'. This means if an applicant selects a disqualifying answer, they will automatically self-disqualify.

1. Select **Add a question**.
2. Search for an existing question by category or keyword search.
3. If you find a question, check the box next to it and select **Submit**.
4. If you are unable to find a question, select **Add a new one**.
5. To add a new question, enter the name of the question, assign a category, and enter the question. Select open ended or predefined answers and **Submit**. Open-ended questions give applicants a free text field for answering. Predefined answers give applicants a yes/no or multiple choice option. Use predefined answers if you wish to create self-disqualifying questions.
6. To require a response, check **Required**.
7. To assign points or disqualifying responses, click on the question for a dropdown menu to appear. Check the answers you would like to be disqualifying.
8. Select **Save.**
9. If you have multiple questions, you can **change the order** they appear by entering an order number in the **Position** box.
10. Select **Save**.

Note, if you created a new question, the status will appear in a pending status until it is reviewed by HRM.

3.4 DOCUMENTS NEEDED TO APPLY (APPLICANT DOCUMENTS)

- Select the documents applicants will need to attach to their application.
- Indicate whether the documents will be required or optional. A cover letter, resume/curriculum vitae, and the names and contact information for 3 professional references is commonly required.
- If you have multiple documents, you can **choose the order of how the documents appear to the applicant** by using the **Order** box to the left of the document name or by clicking and dragging the name of the document into the desired order.
- Select **Save**.
- If you are using the **reference collection tool**, you may or may not request the applicant to provide the names and contact information for 3 professional references.

3.5 POSTING DOCUMENTS

Posting documents include the Position Release Form (required, if personal service funded position), rating sheet, interview questions, meeting minutes, ads, etc.

- To add a document, hover over **Actions** next to the Document Type and select an action (Upload New, Create New, Choose Existing). Select **Save**. The document will be viewable once the conversion is complete.
- To view a document, hover over **Actions** and select **Show**.
- To remove a document, hover over **Actions** and select **Unassign**.
- Documents may be in the following formats: PDF, MS Word or Excel, jpg, txt, rtf, png.

3.6 SEARCH COMMITTEE MEMBERS

This tool functions like the Guest User tool in that it allows **read only access** to the posting, but the user may log in using their Buffalo State NT username and password. The search committee members are assigned per posting. If an employee is selected as search committee member to three (3) separate postings, the employee must be linked or assigned to each of the three (3) postings individually by the creator of the posting.

Human Resource Management will add the search committee members that appear in the position details into the Search Committee Members tab. You do not need to perform this action since HRM will do so.

This is the action HRM will take to populate/complete the Search Committee Member tab:

- search for the employee to see if they have an existing record or create an account. *May need to uncheck the box for 'Display search committee user group members only'.*
- Once an employee is located, select **Add Member**.
- If the employee is also the Search Chair, check the box.

3.7 Evaluative Criteria (Optional)

This optional tool **works with the Search Committee Members tool** and allows the Search Chair to create applicant assessments for the search committee members to complete in the system and then view their assessments. Criteria may be added and assigned points and weight.

- Select **Add a Criterion**.
- Select an existing criterion or **Add a new one**.
- To add a new criterion, select **Category** and open ended or predefined answers and **Submit**.
- To designate weight of criterion, select criterion description. Under possible rankings, enter point value.
- Select **Save**.

3.8 Guest User (Optional)

The Guest User account is used by search committee members (or department colleagues) for read only access to the posting. **The Search Committee Members tool may be used instead.**

- Select **Create Guest User Account**.
- Username will auto populate.
- Password will auto populate. If you wish to change the password, select **Update Password**.
- Enter e-mail addresses of the search committee members.
- Select **Update Guest User Recipient List**.
- Guest Users will receive an e-mail containing the guest username and password when the job is posted.
- Select **Save**.

3.9 Tabs within a Posting

- History – Displays a log of actions that have occurred within the posting including any comments.
- Settings – Used for reference collection.
- Applicants – Displays pool of applicants.
- Reports – Displays various reports available on applicants, including Pre-Interview Report and Interview and Recommendation Report.
- Hiring Proposals (aka Appointment Forms) – Displays Hiring Proposal for the applicant(s) hired.

3.10 Summary and Submit

The Summary tab provides the opportunity to review the posting data entered and make any changes before submitting it to the next approver. Any tab that has an exclamation **(!)** next to it requires your attention and must be completed before moving forward. You may preview the posting to see how it will appear to applicants.

1. Hover over **Take Action on Posting** button and select an appropriate action:
    a. Keep working on this Posting (aka Save)
    b. Submit (move to Dean/Director/AVP Approval or other office in approval chain)
    c. Submit (move to Department Head/Chair) - select if you are a department secretary

2. When the Take Action box appears, you may enter optional comments you want the next approver to receive. The comments will become a permanent part of the recruitment record and cannot be removed.
3. Select **Submit**.
4. On the top of the page, you will see a **blue bar across the top** that states "Posting was successfully transitioned". If you see a **red bar**, it means the action you were trying to take was unsuccessful. Go back and review the noted sections.
5. When HRM reviews and approves the posting, users will receive an e-mail that the job is posted. Marketing and Communications is also notified at this time. You may log in and check the status of a posting at any time. Certain postings require the approval of the President.

4 CREATE A POSTING – QUICK STEPS

1. Open a web browser (Chrome or Firefox preferred) and enter https://jobs.buffalostate.edu/hr using your Buffalo State NT username and password.

   In the upper right-hand corner, be sure it displays your **user type** (e.g., Department Head/Chair, Search Chair, etc. and not employee). If not, toggle the dropdown menu and update as necessary. The system will automatically refresh. The upper left-hand corner will display **Hire**.

2. On the Home page, hover over **Postings** and select the position type. Or, select a Shortcut.
3. Select **Create from Posting Template**.
4. Search or scroll to find your budget title.
5. To the right of the budget title, hover over **Actions** and select **Create From**. If you will be using the **reference collection** tool, please populate the references fields (see Reference Collection).
6. Check the appropriate **Interest Card** category.
7. Select **Create New Posting**.
8. Complete the fields and tabs:
   a. applicant documents
   b. posting documents
   c. supplemental questions
9. When you reach the Summary tab, any tab that has an exclamation **(!)** next to it requires your attention and must be completed before moving forward.
10. Hover over **Take Action on Posting** button and select an appropriate action (see workflow).
11. When the Take Action box appears, you may enter optional comments you want the next approver to receive. The comments will become a permanent part of the recruitment record and cannot be removed.
12. Select **Submit**.
13. On the top of the page, you will see a **blue bar across the top** that states “Posting was successfully transitioned”. If you see a **red bar**, it means the action you were trying to take was unsuccessful. Go back and review the noted sections.
14. When HRM reviews and approves the posting, users will receive an e-mail that the job is posted. Marketing and Communications is also notified at this time. You may log in and check the status of a posting at any time. Certain postings require the approval of the President.

5 APPROVE A POSTING FOR NON-DEPARTMENT HEAD/CHAIR USERS

1. Open a web browser (Chrome or Firefox preferred) and enter https://jobs.buffalostate.edu/hr, log in using your Buffalo State NT username and password.

   In the upper right-hand corner, be sure it displays your **user type** (e.g., Dean/Director and not employee). If not, toggle the dropdown menu and update as necessary. The system will automatically refresh. The upper left-hand corner will display **Hire**.

2. Select **Home** tab.
3. Items pending your approval will appear in the Inbox.
4. Hover over the job title and click the active link.
5. The Posting Summary will display for your review, as well as links to history, settings, applicants, reports, and hiring proposals.
6. Some users may edit the posting. **Save** any changes and select **Summary**.
7. Hover over **Take Action on Posting** button and select an appropriate action:
   a. Keep working on this Posting (aka Save)
   b. Move to (approve) the next office in approval chain
   c. Return to (disapprove) the previous office in approval chain
8. When the Take Action box appears, you may enter optional comments you want the next approver to receive. The comments will become a permanent part of the recruitment record and cannot be removed.
9. Select **Submit**.
10. On the top of the page, you will see a **blue bar across the top** that states "Posting was successfully transitioned". If you see a **red bar**, it means the action you were trying to take was unsuccessful. Go back and review the noted sections.
11. Once the posting is reviewed by HRM, you will receive an e-mail that the job is posted. You may log in and review the posting at any time.

Notes: You may log in and check the status of a posting at any time. Certain postings require the approval of the President.