

PageUp Reference Guide

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Office of Human Resources

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Overview

PageUp provides an enhanced candidate experience from application to onboarding. PageUp delivers a set of tools for managing job postings and applicant information. In addition, offers can be initiated and tracked and employee onboarding can be managed, all in one location, during and after the hiring process. It provides oversight into the numerous organizational units and empowers teams to organize and monitor a large volume of postings and applicants.

The Hiring Manager role will have the main responsibilities of a job posting and by default, will receive all system-automated emails. The Hiring Managers can complete the following tasks within PageUp:

- Review and manage job postings and their statuses
- Manage and communicate with applicants
- Schedule interviews
- View the status of the background check
- Create offers
- Manage employee onboarding tasks

Permissions

Based on the permissions that you have been granted in PageUp, not all features/functions described in this document may be available to you.

A Permission Group determines what level access a PageUp user has within the system. There are different roles within the recruitment and hiring process and, therefore, there is a need for various levels of permission. Human Resources (HR) assigns users their permission group based on the needs of the department or area. The permission group with the most powerful role for each search will be the Hiring Manager. They will be responsible for creating requisitions, the day-to-day management of the search, applicant management, and will be the main point of contact with HR.

Other user types will be covered in the General Guidelines for Using PageUp section.

General Navigation

To access the PageUp system, go to <u>http://www.elon.edu/u/fa/hr/pageup-talent-management-system/</u> and click on the PageUp Login button and log in with your Elon credentials.

PageUp Home Screen / Employee Login

The PageUp Login button on the Human Resource webpage takes you to a login screen.

	Page
ity	Login - Elon
ogin Forgot password? Login	Single Sign-On Login with your company account

Log into PageUp using your single sign on (SSO) Elon credentials (username and password).

LOG IN Annune An	

Next, choose an authentication method using Duo Security.

	Choose an authentication method	
	Duo Push RECOMMENDED	Send Me a Push
ELON UNIVERSITY	🛞 Call Me	Call Me
What is this? I ^a Add a new device	Passcode	Enter a Passcode
<u>My Settings & Devices</u> <u>Need help?</u>	Remember me for 72 hours	

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PageUp System Navigation

Home Screen / Welcome Screen

The home screen / welcome screen contains three main sections:

- 1. My Dashboard
- 2. Side Menu (left side)
- 3. Quick Access Menu (top)



1. My Dashboard

Most of the navigation within the system will occur from My Dashboard.

- The dashboard shows pending actions and provides access to system processes on the tiles. The tile layout on the dashboard displays in order of the steps in the workflow process based on the functionality of the user. You can only see the tiles that you have access to, based on the permissions associated with your role.
- Select the hyperlink (blue numbers or text) on the tile within the dashboard to open that page.

My Dashboard Tiles (Tiles appear depending on your user permission). Not all users will see all the following tiles on the dashboard.

Position Description
My position description - Under review
Manage position descriptions and create

POSITION DESCRIPTION

Create new position descriptions, Edit/Modify current positions or view existing position descriptions on your team.



NEW JOB

View position requisitions, postings, and applicants for job openings.



APPROVALS

View and approve position descriptions and position requisitions.



ADVERTISEMENTS

Preview the job ads for 'sourced / posted jobs', view where the job is sourced / posted to, opening date, and closing date.



APPLICANT PROGRESS BOARD

See a job card, holistic view of the applications for each active job you are recruiting for. Within the **Applicant Progress Board**, applicant cards can be clicked and dragged between status columns.



APPLICATIONS

Review applicants.

Search committee review
1 Jobs requiring panel review

SEARCH COMMITTEE REVIEW

View the applicants in the jobs requiring your review. View the feedback of other search committee members.

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OFFERS

Approve hiring proposals, view new hires, and view onboarding tasks.



2. Side Menu

For users who prefer a traditional menu option, the Side Menu is available from the My Dashboard view. You can navigate to a search of applicants, manage workflows (such as Manage Position Descriptions, Jobs open, Approvals, Advertisements, Applications, and New Hires), manage jobs, and applicants from within the Side menu.

Click on the three white lines in the upper left corner of the screen to access the Side Menu.



3. Quick Access Menu

The Quick Access Menu provides access to Jobs List, People Search, Recent Items, Quick Search, the Knowledge Portal, and Logout.



- **People:** Selecting the 'People' quick link will take you to the list of applicants for the open job that you most recently accessed. NOTE: To search for applicants for other positions, click on the dropdown arrow to the right of the position title and select another position to see the applicants.
- **Recent Items:** Selecting the dropdown arrow will display the most recently accessed items.
- Quick Search: Search for applicants and/or jobs you have access to.
- Logout: Select the dropdown next to your username to logout of the system.
- Knowledge Portal: Access the Knowledge Portal by logging into the PageUp instance, then clicking "?" on the quick access menu and selecting *Knowledge Portal*.

General Guidelines for Using PageUp

The following general guidelines will help you as you work in PageUp.

General guidelines for using PageUp

- Do not use the Back button in your browser to go back to the previous page, as your session will be interrupted, and you may lose your changes.
- Allow pop-ups within your browser when using PageUp.
- Your session will timeout after 120 minutes of inactivity.
- Do not share your login details with any other person.
- PageUp remembers criteria that you have set from previous searches, so you must clear all filters to begin a fresh, new search. In any search area that provides a function, click the **Clear** button first to clear all filter fields.

∃ Page∪p.				Jobs People I	Reports ∨ Settings	Recent items v Quick search Q	Cory 🗸 ? 🗸
New position description							
Position Description							
PD No.	Classification Title	Position Number	Employee Name	Supervisor Name	Work Type All	Area All	~
Department All	Sub department	Approval status	Status Active				Clear Search

• Clean your browser's cache if you are unable to login or view menu options.

Preferred Browser – Google Chrome

The preferred browser for PageUp is Google Chrome.

Permission Types

PageUp limits some areas of visibility and the ability to take actions on positions using a combination of Teams and Permissions.

Teams – Team access determines what position descriptions, requisitions and applications users can see within the system. At Elon, the teams will be built at the department level and users will be assigned to a primary team based on the department ID associated with their position. **Teams control what a user can see.** (Example: *I can see jobs that have been created by members in my team, along with any applicants that have applied. I cannot see jobs created by a different team, etc.*)

NOTE: Teams in PageUp are in no way connected to Microsoft Teams.

Permissions – Permissions define what pages and fields the user has access to, and which fields they can edit, or only view. **Permissions control what a user can do**. (Example: *I have access to create a job, go to system settings, make an offer, access the talent search page, and run searches, etc.*)

- The Employee permission level will be used as the system default.
- Only HR will have the ability to adjust permission levels.

• Permissions are cumulative and additive (example: if an employee has the Department Admin permission as well as the Department Head permission, the employee will be able to perform all actions of a Department Head without changing permission groups)

Hiring Manager

- Access to view/modify/create position descriptions of assigned teams
- Ability to create job postings and recruit from position descriptions
- Can create new employee offers and update applicant statuses

Department Head

- Access to view/modify/create position descriptions of assigned teams
- Ability to create job postings and recruit from position descriptions
- Can create new employee offers and update applicant statuses

Department Admin

- Access to view/modify/create position descriptions of assigned teams
- Ability to create job postings and recruit from position descriptions
- Can create new employee offers and update applicant statuses
- Limited view of salary information

Executive/Reviewing Manager

- Primarily a viewing/approval permission level
- Not able to modify requisitions or change applicant statuses

Budget – This is a reserved permission for the Budget Accountant.

Search Committee & Additional Viewers (aka Guest users)

- View applicant materials
- View/leave notes and provide applicant feedback

Employee – Viewing access only to own position description

All new employees will default to the primary team associated with their position in combination with the **employee** permission level. Additional Team access and permission levels must be requested, approved by the supervisor, and entered by HR and Faculty Operations.

Go to <u>http://www.elon.edu/u/fa/hr/pageup-permission-requests/</u> for secured access to the **PageUp Permission Request** Form.

Definitions

Applicant Card: Individual application details and history.

Application Status: The different steps an applicant goes through during the recruitment process (See Appendix A).

Approval Process: The sequence of approvers needed to post a vacancy or select a candidate for an offer.

Job Card: PageUp form used to submit a requisition to recruit for a position.

Offer Card: PageUp form used to select a candidate for an offer of employment.

Permission Groups: Access level assigned to each user; HR assigns permissions in consultation with department needs.

Requisition: Online request to post for a vacant, or soon to be vacant, position.

Sourcing: Selecting the publications where a job will be advertised or posted for potential applicants to view and/or apply.

Applicant and Application Flags

The following flag has been set up in the system. Flags are added by Human Resources as an applicant progresses through the process.

Requires Sponsorship

Dashboard

The "My Dashboard" view is the landing page within the system. Most of the navigation within the system can occur from My Dashboard.

- The dashboard shows pending actions and provides access to system processes on the tiles. The tile layout on the dashboard displays in order of the steps in the workflow process based on the functionality of the user. You can only see the tiles that you have access to, based on the permissions associated with your role.
- Select the **hyperlink** on the tile within the dashboard to open that page.

ly Dashboard		
elcome Cory, this is your Dashboard where y	ou will see all your tasks organized in various stag	Jes.
ata i	<u> </u>	
Position Description	New Job	Approvals
My position description - Under review	4 Jobs open	O Jobs awatting your approval
Manage position descriptions and create_	New job	4 Approved
4	BB	=
Advertisements	Applicant Progress Board	Applications
3 Advertisements	A holistic view of the applications for each	O Jobs have applicants for review
	active Job you are recruiting for	O Applicants assigned to you for review
	(Review applications)	
141		
Search committee review	Offers	
1 Jobs requiring panel review	O Offers awaiting your approval	
	O New hires	
	O New hire tasks	

Position Descriptions



All postings for staff positions must be created from an existing, approved, position description. To access position descriptions, select **"Manage Position Descriptions and create ...**" from Side Menu, or select the **Job Description** title on the Dashboard.

Use the position description task tile to search for position descriptions. From the Position Description page users can:

- Create new position descriptions
- View existing position descriptions
- Edit existing position descriptions

Create a New Position Description

1. Select "New Position Description" at the top left of the Job Descriptions page. This should only be used for a position that does not currently exist within the system.

Ξ Page Up.		
New position description		
Position Descripti	on	
PD No.	Classification Title	Position Number
Department	Sub department	Approval status
All	✓ All	✓ All

2. Complete the Position Description information. All **required fields** are marked with an **asterisk (*)** and must be completed in order to submit the position description for approval. **Please fill out as many fields as possible when creating a position description.**

lew position description		
osition info Notes Document	ts	
500 0000		
	POSITION INFORMATION	
Type of action requested:	Select	Ŧ
Title:*		
Title:* Division:*	Select	~

- 3. Following the instructions on the screen, you must enter thorough information regarding the new position in the following sections: Position Information, Position Details, Position Duties, Position Requirements, Physical and Environmental Demands, Job Competencies, and Users and Approvals.
- 4. A notable difference between creating a new position description and editing a current position description is that you must select **New** to add job duties in the Position Duties section.

	POSITION DUTIES
	Please list up to six Key Responsibilities of the position and the percentage of time devoted to each responsibility in the table below by clicking the NEW button. Indicating the most important first and adding the approximate percent of time spent on each over the course of a year. DO NOT list any duties or responsibilities that require 10% or less of the position's time.
JOB DUTIES	
% of time Duties / Responsibilities	Essential / Marginal
New	There are no items to show

Once you have entered the % of time, the duty / responsibility, and selected whether it is essential or marginal, then click the **Add** button to add the position duty to the position description.

		POSITION DUTIES		
Please list up to six Key Responsibilities of the position and the percentage of time devoted to each responsibility in the table below by clicking the NEW button. Indicating the most important first and adding the approximate percent of time spent on each over the course of a year. DO NOT list any duties or responsibilities that require 10% or less of the position's time.				
JOB DUTIES	5			
% of time	Duties / Responsibilities		Essential / Marginal	
		There are no items to show	1	
50%	Sample Duty		Essential	
			N	

POSITION INFORMATION (*=Required)

In the Position Information section, please select the **Type of Action Requested.** Note: This field is for informational purposes only and does not define approval process or workflows. The definitions are listed below.

Type of action requested:	Select	A
Title:*	1	۹
nue."	Select	A
Division:*	Create a new position description	
Divisioni	Update Position description to post	
Department:	Update position description (no posting)	
	Reclassification/Significant change in duties	
Sub department:	Interim Assignment/Additional Duties	
Team:	Title Change	
Tean.	Salary Change	
Current Employee:	Employment status change (part-time to full-time)	
	Change funding source of position	

- Create a New Position Description This is selected if creating a position description for the first time.
- Update Position Description to Post This is selected if modifying the position description for posting to fill a vacancy.
- Update Position Description (no posting) This is selected to make minor updates to position that does not
 necessitate a compensation review.
- Reclassification / Significant Changes in Duties This is selected when updating a position description for a
 reclassification study.
- Interim Assignment / Additional Duties This is selected to assign interim or additional duties to an existing position description.

- Title Change This is selected when modifying the position title.
- Salary Change This is selected when changing the salary for a position.
- **Employment Status Change (part-time to full-time)** This is selected when the employment status is being changed, whether part-time to full-time or full-time to part-time.
- Change Funding Source of Position This is selected when changing the funding source for a position.

Users with the appropriate permission level can revise the current position description. In many fields, you can begin typing in a field to make the changes.

Effective Date – Enter the approved effective date.

Additional Information – Reason for the Request (*) – Provide any additional context that supports the requested action.

Title (*) – Enter the desired title of the position.

Division (*) – Select the Division this position belongs to in the organization.

Department – Select the Department this position belongs to in the organization.

Sub Department – If available, select the Sub Department this position belongs to in the organization from the options available. If the position does not belong to a sub department, make no selection.

Team – Default value. No action is required.

Current Employee – If known, enter the name of the current employee (*whose position you want to find/choose/base your position on*) and click the magnifying glass to find the person from the directory.

	Q,7
No user selected.	
	No user selected.

Position Type (*) – In the dropdown list, select whether the position is Staff Full-time, Staff Part-time, Faculty Full-time, Adjunct, or Temporary.

Hours per Week – Enter a numerical value.

Days of the Week Scheduled to Work – If known, enter the range of days that the person is expected to work each week (e.g., M-F). If unknown, leave blank.

Required to be on Campus During Core Hours – If known, please select Yes or No on the radio buttons. Elon core hours are Monday through Friday from 8:00 am to 5:00 pm.

Adjusted Work Hours and Location Description – If known, you can add additional details.

Months per Year – Select a number between 1 and 12.

Funding Source (*) – Enter your funding source number and search using the magnifying glass to populate the cost center in this field.

Salary Request – If known, enter the salary request for the position.

POSITION DETAILS

Please describe as clearly and concisely as possible all the information that would be important to fully understand the role and scope of the position. This includes the minimum levels generally necessary to effectively handle the job's essential functions, plus the preferred levels for education and work experience.

In the Position Details section, users with appropriate permissions can enter or edit the following details:

• **Division Description** – This field is used to indicate where the position is situated within the organizational structure.

Example: "The Human Resources Information Systems Analyst position falls under the Division of Finance and Administration in the Office of Human Resources. This position reports to the Director of Human Resources Information Systems and Data Analytics."

- **Position Summary** This field is used to describe the overall responsibilities of the position. *Example:* "The Custodial Supervisor position is responsible for providing leadership, planning, and direction. A Custodial Supervisor oversees events and work crews to ensure procedures are being followed and to maintain the high standards of the University's cleanliness. The Custodial Supervisor also ensure proper training is complete."
- **Minimum Required Education and Experience (*)** Enter or edit the minimum required education and experience.
- **Preferred Education and Experience** If known, enter or edit the preferred education and experience qualifications.
- **Required Other Training, Certifications, or Licensing** If needed for the position, enter or edit the required other training, certifications, or licensing.
- Knowledge, Skills, Abilities If known, enter or edit the required knowledge, skills, and abilities. If known, you may add the preferred qualifications.

POSITION DUTIES

On the specific job duties, you must click **Edit** to revise the duties / responsibilities or the percentage of time for each duty.

	POSITION DUTIES		
	Please list up to six Key Responsibilities of the p each responsibility in the table below by clicking important first and adding the approximate per year. DO NOT list any duties or responsibilities th	the NEW buttor cent of time spe	n. Indicating the most ent on each over the course of a
JOB DUTIES	;		
% of time	Duties / Responsibilities	Essential / Marginal	
40%	Contributes to the achievement of University enrollment and recruitment goals and objectives by representing the University at college fairs and high school/community	Essential	Edit Remove

POSITION REQUIREMENTS

This section describes the supervisor responsibilities of the position.

This position supervises others – If known, select employees, students, both or none.

List of Positions – If known, type in the position titles of all the positions that are supervised by the current position that you are editing.

Supervision Details – Select employees, students, both or none for the following prompts:

- This position gives guidance, work direction and training to others, but does not hire, terminate or do performance appraisals.
- This position gives guidance, work direction and training to others, does not hire, terminate or do
 performance appraisals.
- This position supervises non-supervisors, including hiring, terminating and conducting performance appraisals.
- This position supervises supervisors, including hiring, terminating and conducting performance appraisals.

Some Evening and Weekend Work Required – If the answer is yes, describe the details of the evening and weekend work in the text box.

On Call Required – If the answer is yes, described the on-call requirements in the text box.

Travel Required – If the answer is yes, described the travel requirements in the text box.

PHYSICAL AND ENVIRONMENTAL DEMANDS

1. Following the prompts on the screen, answer the questions with None, Rarely (<33%), Frequently (33-66%), or Most of the Time (>66%).

РНУ	SICAL AND ENVIRONMENTAL DEMANDS	
	Select which physical demand(s) of the following physical activitie:	s does this iob require
Stand:	Select	*
Walk:	1	٩
Sit:	Select	
Reach with hands and arms:	None	
	Rarely (<33%) Frequently (33-66%)	
Climb or balance:	Most of the Time (>66%)	
Stoop, kneel, crouch or crawl:	Select	•
Talk or hear:	Select	Ŧ
Taste or smell:	Select	.
Vision:	Select	v
Does this job require that weight be lifted or force		
be exerted?:	Select	Ŧ

2. After answering the lifting or force pound requirements, please make notes on the specific job duties that require the physical demands selected.

Make notes on the specific job duties that require the physical demands selected above:	
	li li

3. Next, answer the questions related to the working conditions with None, Rarely (<33%), Frequently (33-66%), or Most of the Time (>66%).

USERS AND APPROVALS (*=Required)

Search for the appropriate Hiring Manager name and then click the magnifying glass to search for the person's email address. If found, the user's email address will appear in a blue box.

	USERS AND APPROVALS
Hiring Manager:*	Cory Potter

If multiple users have the same name, a search screen will pop up alerting you that multiple users were found based on your criteria. Please select a user from the choices.

Search - Google	Chrome		-		×
elon.dc4.pag	euppeople.com/v5.3/pro	ovider/searchField/searchDialog.a	asp		
O Multiple use	rs were found based o	on your criteria, please select a	user below:		
First name:		Preferred name:			
Last name:		E-mail:			
Search					
First name 🔻	Preferred name	Last name E-mail			
Justin	Justin				
Justin	Justin				
Page 1 of 1			Reco	ds 1 to 2	of 2

For the **Approval Process** required field, select the appropriate process, such as **Staff Approval**. Using the same search function as described immediately above, type in the appropriate names of the individuals who must approve the new position description.

NOTE: Some name fields will default to the designated person for that category of approver. Please do not change the default fields.

Optional Step: Adding Notes to a Position Description

Toward the bottom of the screen (above the **Save** buttons), you can click on **Next page** > (blue text) to get to the **Notes** screen.

Please fill in all mar		t page	an asterisk (*).
Save a draft	Save	Save and exit	Cancel

To add a special instructional note to the position description (such a split funding), select **Note** from the dropdown list.

Position info Notes Documents	
Select Note Hold day	
Select Note Hold day	
Next page>	
Save a draft Save Save and e	t Cancel

A pop-up window appears. You can add a note in the text box. You are given the option to email the note (special instructions) to users in the active directory. Click **Save** (or **Cancel**) at the bottom of the pop-up window once you have added details.

Add note - PageUp - Work - Micr	osoft Edge	- 0	×
https://adminuat.dc4.pa	geuppeople.com/JobNote/Add?sData=UFUtVjMtII2vfMYxpQXk5b%2Fn6t7c	oYt54Pf6Ux	Y A [®]
Add note		ļ .	Ð
Note:*			
File:			
riie.	G Upload file		
E-mail this note to:			
User:	Q /		
Other e-mail:			
	Save Cancel		

Once you click the **Save** button, you have the options to (a) edit the note, (b) delete the note, (c) add another note, (d) navigate to the **Position Info** tab, or (e) navigate to the **Documents tab** (by clicking on **Next page >** or clicking on **Documents** on the menu.

New position description	
Position info Notes Documents	
Add: Select 🗸	
May 16, 2023, 3:39pm TEST	Cory Potter
	Edit Delete
Next page>	
Save a draft Save Save and exit Cancel	
Save a drait Save Save and exit Cancer	

OR

Selecting Save or Save and Exit at the bottom of the page will initiate the approval process.



Optional Step: Adding Documents to a Position Description

Navigate to the **Documents tab** (by clicking on **Next page >** or clicking on **Documents** on the menu, after adding optional notes (see section above).

New position description			
Position info Notes Document			
Add: Select V			
May 16, 2023, 3:39pm TEST			Cory Potter
			Edit Delete
	Next page>		
	Save a draft Save Save and	exit Cancel	

Select **Document from a file** from the dropdown list to add a document (such as an updated organizational chart)

New position description Position info Notes Documents	
Select Select Document from a file Document from library	Date Size Category
Save a draft	Save Save and exit Cancel

A pop-up window appears with an **Upload file** button.

🗢 Up	load a new document - PageUp - Work - Microsoft Edge —	0	×
Ô	https://adminuat.dc4.pageuppeople.com/FileUpload?sData=UFUtVjMtqib1x	TQq	A∥
Uple	oad a new document		₽
D	ile:* Position description itle:		
	Save and add another Save and close Close		

Next, click **Save and add another** to add another document to the position description. Click **Save and close** to save your document and close the pop-up window. Click **Close** to exit the pop-up window without saving the document. Next, selecting **Save** or **Save and Exit** at the bottom of the page will initiate the approval process.



View a Current Position Description

To view the current position description, go to **Jobs** on the Quick Access, or select **Manage Position Descriptions** in the Side Menu or from your **Dashboard**:

- 1. Locate the position number.
- 2. Click View (blue text) toward the right side of the screen for identified position to bring up the current description.

w position description								
osition Descrip	tion							
D No. 10	Classification Tit	tle Position	Number	Employee Name	Supervisor Name	Work Type All	Area	~
All	Sub department	t Approva		Status Active	~			Clear Search
D No. Classificat	ion Title	Position Number	Employee Name	Supervisor Name	Date modified	Approval status	× ×	
0-10 Admissions	Counselor - TEST				Mar 24, 2023	Draft	Ed View D	ecruit for position Arch

Edit a Current Position Description

- 1. To make changes to an existing position description, select **Manage Position Descriptions** in the Side Menu or from the dashboard.
- 2. Click on the **Edit** (blue text) to the right of the position description you wish to change. You can also view the position description or recruit directly for the position from this screen.

lew position descrip	tion								
osition Desci	ription								
PD No.		Classification Title	Position	Number	Employee Name	Supervisor Name	Work Type	Area	
10							All	✓ All	~
Department		Sub department	Approva	status	Status				Clear Search
All	~	All	✓ All		✓ Active	~			Clear Search
PD No. Classi	fication Title		Position Number	Employee Name	Supervisor Name	Date modified	Approval status		
PD-10 Admiss	sions Counselor -	TEST				Mar 24, 2023	Draft	Edit Driew R	Recruit for position A

- 3. Scroll to the bottom of the screen and click the **Update PD** button.
- 4. Click **OK** in the pop-up window that appears.

POSITION INFORMATION (*=Required)

In the Position Information section, please select the **Type of Action Requested**. Note: This field is for informational purposes only and does not define approval process or workflows. The definitions are listed below.

	POSITION INFORMATION	
The station of the state of the		
Type of action requested:	Select	
Title:*		٩,
nue.	Select	· · · · · · · · · · · · · · · · · · ·
Division:*	Create a new position description	
bivision.	Update Position description to post	
Department:	Update position description (no posting)	
	Reclassification/Significant change in duties	
Sub department:	Interim Assignment/Additional Duties	
eam:	Title Change	
	Salary Change	
Current Employee:	Employment status change (part-time to full-time)	
	Change funding source of position	-

- Create a New Position Description This is selected if creating a position description for the first time.
- Update Position Description to Post This is selected if modifying the position description to post a job.
- Update Position Description (no posting) This is selected to make minor updates to position that does not necessitate a compensation review.
- **Reclassification / Significant Changes in Duties** This is selected when updating a position description for a reclassification study.
- Interim Assignment / Additional Duties This is selected to assign interim or additional duties to an existing position description.
- **Title Change** This is selected when modifying the position title.
- Salary Change This is selected when changing the salary for a position.
- **Employment Status Change (part-time to full-time)** This is selected when the employment status is being changed, whether part-time to full-time or full-time to part-time.
- Change Funding Source of Position This is selected when changing the funding source for a position.

Users with the appropriate permission level can revise the current position description. In many fields, you can begin typing in a field to make the changes.

Effective Date – Enter the approved effective date.

Additional Information – Reason for the Request (*) – Provide any additional context that supports the requested action.

Title (*) – Enter the desired title of the position.

Division (*) – Select the Division this position belongs to in the organization.

Department – Select the Department this position belongs to in the organization.

Sub Department – If available, select the Sub Department this position belongs to in the organization from the options available. If the position does not belong to a sub department, make no selection.

Team – Default value. No action is required.

Current Employee – If known, enter the name of the current employee and click the magnifying glass to find the person from the directory.

Current Employee:		
	No user selected.	

Position Type (*) – In the dropdown list, select whether the position is Staff Full-time, Staff Part-time, Faculty Full-time, Adjunct, or Temporary.

Hours per Week – Enter a numerical value.

Days of the Week Scheduled to Work – If known, enter the range of days that the person is expected to work each week (e.g., M-F). If unknown, leave blank.

Required to be on Campus During Core Hours – If known, please select Yes or No on the radio buttons. Elon core hours are Monday through Friday from 8:00 am to 5:00 pm.

Adjusted Work Hours and Location Description – If known, you can add additional details.

Months per Year – Select a number between 1 and 12.

Funding Source (*) – If known, you can enter your funding source number and search using the magnifying glass to populate the cost center in this field.

Salary Request – If known, enter the salary request for the position.

POSITION DETAILS

Please describe as clearly and concisely as possible all the information that would be important to fully understand the role and scope of the position. This includes the minimum levels generally necessary to effectively handle the job's essential functions, plus the preferred levels for education and work experience.

In the Position Details section, users with appropriate permissions can enter or edit the following details:

• **Division Description** – This field is used to indicate where the position is situated within the organizational structure.

Example: "The Human Resources Information Systems Analyst position falls under the Division of Finance and Administration in the Office of Human Resources. This position reports to the Director of Human Resources Information Systems and Data Analytics."

• **Position Summary** – This field is used to describe the overall responsibilities of the position.

Example: "The Custodial Supervisor position is responsible for providing leadership, planning, and direction. A Custodial Supervisor oversees events and work crews to ensure procedures are being followed and to maintain the high standards of the University's cleanliness. The Custodial Supervisor also ensure proper training is complete."

- **Minimum Required Education and Experience (*)** Enter or edit the minimum required education and experience.
- **Preferred Education and Experience** If known, enter or edit the preferred education and experience qualifications.
- **Required Other Training, Certifications, or Licensing** If needed for the position, enter or edit the required other training, certifications, or licensing.
- Knowledge, Skills, Abilities If known, enter or edit the required knowledge, skills, and abilities. If known, you may add the preferred qualifications.

POSITION DUTIES

On the specific job duties, you must click **Edit** to revise the duties / responsibilities or the percentage of time for each duty.

	POSITION DUTIES	
	Please list up to six Key Responsibilities of the pos each responsibility in the table below by clicking th important first and adding the approximate percer year. DO NOT list any duties or responsibilities that	e NEW button. Indicating the most nt of time spent on each over the course of a
JOB DUTIES		
% of time	Duties / Responsibilities	Essential / Marginal
40%	Contributes to the achievement of University enrollment and recruitment goals and objectives by representing the University at college fairs and high school/community college recruitment visits; advising prospective students and their parents regarding admission requirements, academic programs, financial aid and scholarships, residence halls, student organizations and activities; assisting with the development of publications used for admissions and recruitment; responding to written, phone, email, and in-person inquiries; meeting with visiting students and parents; and planning activities and events, both on and off-campus, for prospective students/families and high school counselors.	

POSITION REQUIREMENTS

This section describes the supervisor responsibilities of the position.

This position supervises others – If known, select employees, students, both or none.

List of Positions – If known, type in the position titles of all the positions that are supervised by the current position that you are editing.

Supervision Details – Select employees, students, both or none for the following fields:

- This position gives guidance, work direction and training to others, but does not hire, terminate or do performance appraisals.
- This position gives guidance, work direction and training to others, does not hire, terminate or do performance appraisals.

- This position supervises non-supervisors, including hiring, terminating and conducting performance appraisals.
- This position supervises supervisors, including hiring, terminating and conducting performance appraisals.

Some Evening and Weekend Work Required – If the answer is yes, describe the details of the evening and weekend work in the text box.

On-Call Required – If the answer is yes, described the on-call requirements in the text box.

Travel Required – If the answer is yes, described the travel requirements in the text box.

PHYSICAL AND ENVIRONMENTAL DEMANDS

Following the prompts on the screen, answer the questions with None, Rarely (<33%), Frequently (33-66%), or Most of the Time (>66%).

РН	SICAL AND ENVIRONMENTAL DEMANDS	
	Select which physical demand(s) of the following physical activities doe	es th
Stand:	Select	
/alk:	1	Q,
t:	Select	
	None	
each with hands and arms:	Rarely (<33%)	
limb or balance:	Frequently (33-66%) Most of the Time (>66%)	
stoop, kneel, crouch or crawl:	Select	¥
alk or hear:	Select	Ŧ
ste or smell:	Select	Ŧ
ion:	Select	Ŧ
pes this job require that weight be lifted or force exerted?:	Select	Ŧ
	If above 1%, please complete the next five questions	
o to 10 pounds:	Select	Ŧ
o to 25 pounds:	Select	Ŧ
p to 50 pounds:	Select	Ŧ
o to 100 pounds:	Select	Ŧ
ore than 100 pounds:	Select	Ŧ

After answering the lifting or force pound requirements, please make notes on the specific job duties that require the physical demands selected.

Make notes on the specific job duties that require the physical demands selected above: Next, answer the questions related to the working conditions with None, Rarely (<33%), Frequently (33-66%), or Most of the Time (>66%).

USERS AND APPROVALS (*=Required)

Search for the appropriate Hiring Manager name and then click the magnifying glass to search for the person's email address. If found, the user's email address will appear in a blue box.

	USERS AND APPROVALS
Hiring Manager:*	Cory Potter
	Email address: cpotter9@elon.edu

If multiple users have the same name, a search screen will pop up alerting you that multiple users were found based on your criteria, please select a user from the choices.

Search - Google (Chrome		-		\rightarrow
elon.dc4.page	euppeople.com/v5.3/pr	ovider/searchField/searchDialog.asp			
Multiple use	rs were found based (on your criteria, please select a user bel	ow:		
First name:		Preferred name:			
Last name:		E-mail:			
Search					
Search					
First name 🔻	Preferred name	Last name E-mail			
Justin	Justin				
Justin	Justin				
Page 1 of 1			Recor	ds 1 to 2	of 2

For the **Approval Process** required field, select the appropriate process, such as **Staff Approval**. Using the same search function as described immediately above, type in the appropriate names of the individuals who must approve the new position description. **Note:** Some name fields will default to the designated person for that category of approver.

Selecting Save or Save and Exit at the bottom of the page will initiate the approval process.



How to Request Action on an Existing Staff Position

Currently, personnel action requests are being managed through Elon's paper **Personnel Action Request (PAR) Form** found on the website at https://www.elon.edu/u/fa/hr/forms/ under **Supervisor**.

NOTE: HR will be monitoring PAR forms and running parallel processes in PageUp to assess system behavior related to record retention in combination with current internal processes in a stabilization period after initial launch of PageUp.

Approval Process for Position Descriptions

- 1. The Hiring Manager creates a position description.
- 2. The approval process (workflow) is required and is selected from a dropdown list.

	USERS AND APPROVALS
Hiring Manager:*	Cory Potter Q 🥒
Approval process:*	Email address: cpotter9@elon.edu v
	None Admissions and Financial Aid Athletics Faculty Approval Finance and Administration Inclusive Excellence
	Staff Approval

- 3. When you select an approval process (e.g. Faculty Approval, Staff Approval, Title / Salary Change Approval), the list of approver types required for that process will be system generated in the box beneath the selection. There is a slight pause in the software as the approval workflow generates. This is typical.
- 4. Some employees in the workflow (e.g. HR/Faculty Operations, Budget, Compensation and Recruitment) will prepopulate. If an approver's name or email address prepopulates, please do not change the approver without prior discussions with Human Resources.
- 5. Other approvers in the workflow will need to be identified.
- 6. To add an approver, type a name into the text box and select the magnifying glass (**Q**) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

	USERS AND APPROVALS	
Hiring Manager:*	Cory Potter Email address: cpotter9@elon.edu] Q 🖉
Approval process:*	Staff Approval 🗸	
2. Reviewing Manager:		Q 🖉
	No user selected	
3. Human Resources - Comp:	Compensation and Recruitment	Q 🖉
	compandrecruitment@elon.edu	~

1. Scroll to the bottom of the page and select **Save** or **Save and Exit**.



Approve a Position Description

Via Email

When a position description has been allocated to an employee for approval (approver), that approver will receive an email. The approver has the option to reply to the email with the word "**Approve**" as an option. The approver should already know the specific details to take this action.

This message originated from outside of Elon University's email system.
Hi Cory,
A position description Test Job for Training - Position Description Number: 11. has been allocated to you for approval.
You can approve the position description as is or make amendments as required before approving. Please discuss amendments with the "Hiring Manager". You can also decline the position description if it is not approved.
To approve the position description via email, please reply to this email with the word "Approve".
Please Note: the word "Approve" is the only valid response accepted via the email position description approval option.
OR
To view the position description in more detail, approve, provide comment or decline, please click the following link to go to the online system to manually do so:
View Position Description
Please Note: this is accessible by computer only.
Kind regards,
Elon University Human Resources
Elon University

The email sent to the approver contains a notice for the approver to log in to 1) receive more detail, 2) approve, 3) provide comment, or 4) decline.

Within PageUp

There are multiple ways to get to the approval screen within PageUp.

- 1. Via an Email
 - a. Click on the View Position Description link provided in a system-generated email.

To view the position description in more detail, approve, provide comment or decline, please click the following link to go to the online system to manually do so:
View Position Description
Please Note: this is accessible by computer only.
Kind regards,
Elon University Human Resources

- b. You will need to use Elon's Single Sign On (SSO) process to log into PageUp.
- c. Once you are viewing the position description, scroll to the bottom of the page to click on the **Approve** button.



- 2. My Dashboard
 - a. On the **My Dashboard** screen, find the **Approvals** tile.
 - b. Click on the blue number (if greater than zero) beside "Jobs awaiting your approval".

≡ PageUp.•		Jobs People I	Reports - Settings	Recent items v	Quick search Q	Cory
My Dashboard Welcome Cory, this is your Dashboard where y	ou will see all your tasks organized in various sta	ges.				
Position Description Mr position description - Under review (Mrssap position descriptions and create	New job 2.3dos open 22 tean jobs open Rew job	Approvals 3 Jobs weating your approva 3 Approved	Click HERE	ines / Tips to access online refe	erence materials	

- c. Click View to the right of the position description you are wanting to approve.
- d. Once you have reviewed the specific position description, scroll to the bottom of the page to click on the **Approve** button.

	\frown		
Save a draft	Approve	Decline	Cancel

- 3. To use the Side Menu (Two options):
 - a. Click on the Side menu and select Manage Position Descriptions under the Jobs heading.
 - i. Find the Classification Title of the position you are to approve.
 - ii. Be sure you have cleared any other search criteria by clicking on the **Clear** button.
 - iii. To make the list smaller, use the search function by selecting **Pending Approval** from the dropdown list under **Approval Status.**
 - iv. Then click the **Search** button.

lew position description					
Position Descriptio	on				
PD No.	Classification Title	Position Number	Empl	oyee Name	
Supervisor Name	Work Type	Area	Depa	rtment	
	All	✓ All	✓ AI		~ < 7
Sub department	Approval status	Status			
All	 Pending approval 	 Active 	~		Clear Search

v. Next, click **View** (blue text) to the right of the position description that you are to approve.

	Classification Title	Position Number	Employee Name	Supervisor Name	Date modified	Approval status				
	Research Assistant (Arts/Communications)	50054452		Harry Hire		Pending approval	Edit	View	Recruit for positi	on Archiv
	Associate Professor of Arts/Communications	50053612	Sam Search	Darlene Director		Pending approval	Edit	View	Recruit for positi	on Archiv
PD-12 F	PageUp Coordinator Level II					Pending approval	Ed	View	ecruit for positi	on Archiv

- vi. After reviewing the position description, scroll to the bottom of the page and click on the **Approve** button.
- b. Click on Approvals under the Workflows heading.
 - i. On the Manage Approvals screen select Pending from the Approval Status dropdown list.
 - ii. Then, click the **Search** button on the right side of the screen.

≡ PageUp.	Recent items 🗸 Jamie 🗸 🤫 🗸
Manage approvals	
Approval status Pending	Clear Search

iii. Click View to the right of the position description you are wanting to approve.

Manage ap	provals					
Approval statu	s				dara Ca	
Pending	~				Clear Se	arch
Date raised	Reference No.	Job title 🔺	Hiring Manager	New	Replacement	
Apr 20, 2023	PD-12	PageUp Coordinator Level II	Jamie Canada			View

iv. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Approve** button.



Decline a Position Description

There are multiple ways to get to the approval screen within PageUp.

- 1. Via an Email
 - a. Click on the **View Position Description** link provided in a system-generated email.

To view the position description in more detail, approve, provide comment or decline, please click the following link to go to the online system to manually do so:
View Position Description
Please Note: this is accessible by computer only.
Kind regards,

- b. You will need to use Elon's Single Sign On (SSO) process to log into PageUp.
- c. Once you are viewing the position description, scroll to the bottom of the page to click on the **Decline** button.



- 2. My Dashboard
 - a. On the **My Dashboard** screen, find the **Approvals** tile.
 - b. Click on the blue number (if greater than zero) beside "Jobs awaiting your approval".

My Dashboard Welcome Cory, this is your Dashboard where you	will see all your tasks organized in various st	nges.	
Position Description My position description: Under review Manage pasition descriptions and create	New job 2. Jobo open 22. team jobo open New job	Approvals 3 Jobs availing your approval 3 Approval	Guidelines / Tips Click MBE to access online inference mater

- c. Click View to the right of the position description you are wanting to decline.
- d. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Decline** button.

Save a draft	Approve	Decline	Cancel
Save a drate	Approve	Decime	currect

- 3. To use the Side Menu (Two options):
 - a. Click on the Side menu and select Manage Position Descriptions under the Jobs heading.
 - i. Find the Classification Title of the position you are to approve.
 - ii. Be sure you have cleared any other search criteria by clicking on the **Clear** button.
 - iii. To make the list smaller, use the search function by selecting **Pending Approval** from the dropdown list under **Approval Status**.
 - iv. Then click the **Search** button.

lew position description					
Position Descriptio	n				
PD No.	Classification Title	Position Number	Empl	oyee Name	
Supervisor Name	Work Type	Area	Depa	rtment	
	All	✓ All	✓ All		\sim $\overline{7}$
Sub department	Approval status	Status			
All	 Pending approval 	 Active 	~		Clear Search

v. To the right of the position description that you are to approve, click **View** (blue text).

PD No.	Classification Title	Position Number	Employee Name	Supervisor Name	Date modified	Approval status					
	Research Assistant (Arts/Communications)	50054452		Harry Hire		Pending approval	Edit	View	Recruit for	osition	Archive
	Associate Professor of Arts/Communications	50053612	Sam Search	Darlene Director	Aug 28, 2019	Pending approval	Edit	View	Recruit for	osition	Archive
PD-12	PageUp Coordinator Level II					Pending approval	EQ	View	ecruit for	osition	Archive
								\land			
Page 1 o	of 1 🎾						- 1	<u>г</u>	<u> </u>	Records 1	

vi. After reviewing the position description, scroll to the bottom of the page and click on the **Decline** button.



- b. Click on Approvals under the Workflows heading.
 - 1. Next, on the Manage Approvals screen select Pending from the Approval Status dropdown list.
 - 2. Then, click the **Search** button on the right side of the screen.

≡ PageUp.	Recent items 🗸 🛛 Jamie 🗸 😗 🗡
Manage approvals	
Approval status	Clear Search
Pending 🗸	Clear Search

3. Click View to the right of the position description you are wanting to approve.

Ξ Page Up	⊃.◆			Recent iter	ns v Jamie v ? v
Manage ap	provals				
Approval statu Pending	s V				Clear Search
Date raised	Reference No.	Job title 🔺	Hiring Manager	New	Replacement
Apr 20, 2023	PD-12	PageUp Coordinator Level II	Jamie Canada		View
Dage 1 of 1					

4. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Decline** button.



Restart a Position Description Approval Process

- 1. To restart the position description approval process for an existing position description, select **Manage Position Descriptions** in the Side menu or from the dashboard.
- 2. Click on the Edit (blue word) to the right of the position description approval process you wish to restart.

Position Description	ı											
PD No.		Classification Title		Position Number	Empl	oyee Name		Supervisor Name	Work Type	~	Area	~
Department		Sub department		Approval status	Statu	IS						
All	~	All	~	All	✓ Ac	tive	~					Clear Se

3. Scroll down to the USERS AND APPROVALS section.

4. Click on the **Update PD** button.

Hiring Manager:*	Q /	
	Email address: sdavis55@elon.edu	
Approval process:*	Staff Approval	
1. Hiring Manager:	• You are here Resend email to approver	
2. Reviewing Manager:		
3. Human Resources - Comp:		
4. Budget:		
5. VP:		
6. Human Resources - Ops:	N N	

5. You will see a pop-up warning asking, "Are you sure you want to restart the approval process?" Click **OK** to restart. Please remember to allow pop-ups within your browser.



- 6. Go to the USERS AND APPROVALS section of the position description and select the appropriate **Approval Process** from the dropdown list.
- 7. When you select an approval process (e.g. Faculty Approval, Staff Approval, Title / Salary Change Approval), the list of approver types required for that process will generate in the box beneath the selection. There is a slight pause in the software as the approval workflow generates. This is typical.
 - a. Some employees in the workflow (e.g. HR/Faculty Operations, Budget, Compensation and Recruitment) will pre-populate. If an approver's name or email address pre-populates, please do not change the approver without prior discussions with Human Resources.
 - b. Other approvers in the workflow will need to be identified.
- 8. To add an approver, type a name into the text box and select the magnifying glass (**Q**) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.
- 9. Scroll to the bottom of the page and select Save or Save and Exit.



Assign a Different Approver

Once the position has been submitted for approval, the hiring manager will not be able to make changes to the approval workflow while the action is routing. The next approver in the workflow has the ability to make modifications to the approval process using the directions below.

- 1. Go to the USERS AND APPROVALS section of the position description.
- 2. Under the Approval Process fields, click on the Edit button.

	USERS AND APPROVALS
Hiring Manager:*	Cory Potter Q 🖉
Approval process:*	Staff Approval
1. Hiring Manager:	 Approved Apr 11, 2023
2. Reviewing Manager:	🖋 Approved Apr 11, 2023
3. Human Resources - Comp:	• You are here Resend email to approver
4. Budget:	
5. VP:	
6. Human Resources - Ops:	
	Update PD Edit Cancel

- 3. The following fields are defaulted to the appropriate contacts in that area. Do not overwrite these pre-populated email addresses: Human Resources Comp, Budget, and Human Resources Operations.
- 4. A screen will pop up that allows you to
 - Click on the eraser (*2*) to clear the current name in a field.
 - You can then type the name of the Elon employee that will be added as the new approver.
 - Select the binoculars (🏦) to find the email address of the new approver.
 - Click Save.

elon.dc4.pageuppeople.com/v5.	3/provider/approvalProcess/EditA	ppro	vers.
 Hiring Manager: Reviewing Manager: 	Cory Potter		
3. Human Resources - Comp:	Bruce Cottrill	<i>8</i> 8	a
	E-mail: bcottrill@elon.edu		~
4. Budget:	Christy Isley	<i>a</i> a	2
	E-mail: cisley2@elon.edu		~
5. VP:	Kelli Shuman	<i>8</i> 8	a
	E-mail: kshuman2@elon.edu		~
6. Human Resources - Ops:	Jamie Canada	<i>8</i> 8	2
	E-mail: jcanada@elon.edu		~
Sa	ve Cancel		
Recruit for a Position

All job requisitions must be generated from an approved position description.

Create a Requisition (Job Card)

1. Select a **Recruit for Position** (blue text) to the right of the identified, approved position description.

ew position description								
osition Descript	ion							
PD No.	Classification Title	Position Number	Employee Name	Supervisor Na	me	Work Type	Area All	Ţ
Department	Sub department	Approval status	Status					
All	✓ All	✓ All	 Active 	~				Search

2. Fill in the requisition details in the sections as described below.

REQUISITION INFORMATION (*=Required)

Requisition Number – Leave blank. A reference number will generate automatically.

Position Title (*) – Make sure the position title from the position description is the correct title. If changes are being made to the title, you must follow the instructions for requesting a title change for an existing position.

Position Number – Existing positions will have a position number. To verify the details of the position number, click on **Details** in the blue area beneath the field.

	REQUISITION INFO	ORMATION	
Requisition Number:			
	Leave blank to automatica	ally create a reference	No.
Position Title:*	Director of Arts/Commu	nications	
Position number:	50054436	Q 🍠	
	Details Position no: 50054436 Position: Director of Arts. Incumbent: Darlene Dire VP Area: Division 3 Department: Departmen Sub Department: Sub-de FTE: 1.00 Supervisor:	ctor t 2	~

Division (*) – Verify or select the Division this position belongs to in the organization.

Department – Verify or select the Department this position belongs to in the organization.

Sub Department – If available, verify or select the Sub Department this position belongs to in the organization from the options available. If the position does not belong to a sub department, make no selection.

Supervisor – Type the name of the position's supervisor in the text field. Select the magnifying glass (\mathbf{Q}) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

Team – Default value. No action is required.

Recruit for Multiple Positions with the Same Job Description

NUMBER OF OPENINGS (*=Required)

New / Replacement – Enter the number of new positions (additional headcount) and replacement positions (backfilling an existing employee) you intend to create using the position description. Then click the **Add More** button.

		NUMBER OF OP	ENINGS
		Select the amount of posit (backfilling an existing emp	tions required: New (additional headcount) or Replacement ployee)
Positions: Position no	Type:	Applicant	Application status
		• No positions exist for	or this job.
			New: 1 Replacement: 1 Add more
Reason:* Additional Information - R (Please provide any addition supports the requested ac	onal context that	Select 👻	
Employee Being Replaced:			

Reason (*) – From the dropdown list, select a reason for the request (new position, resignation, termination, leave coverage, or restructure).



Additional Information - Reason for Request – You can add additional information to expound on the reason for the request and provide any additional context that supports the requested action.

Employee Being Replaced – If known, type the first and last of the person being replaced (backfilling an existing employee).

REQUISITION DETAILS (*=Required)

Position Type (*) – In the dropdown list, select whether the position is Staff Full-time, Staff Part-time, Faculty Full-time, Adjunct, or Temporary.

	REQUISITION
Position Type:*	Staff Full-Time 🗸
Months per Year:*	Select Staff Full-Time
Hours per week (staff only):	Staff Part-Time Faculty Full-Time
Days of the week scheduled to work (staff only):	Adjunct Temporary
Required to be on main campus (staff only):	● Yes ○ No

Faculty Track (for faculty only) – If known, select the appropriate faculty track for this position from the dropdown list, which includes: Adjunct, Continuing Track, Lecturer Track, Limited-Term, Tenure Track, and Visiting.

	REQUISITION DETAILS	
osition Type:*	Staff Full-Time 🗸	
culty Track:	Select	*
nths per Year:*	1	Q,
ours per week (staff only):	Select Adjunct	
s of the week scheduled to work (staff only):	Continuing Track Lecturer Track	
uired to be on main campus (staff only):	Limited-Term	
ary Range:	Tenure Track	
ding Source:	Visiting	

Months per Year (*) – Select a number between 1 and 12 from the dropdown list.

Hours per Week (staff only) – Enter a numerical value.

Days of the Week Scheduled to Work (staff only) – If known, enter the range of days that the person is expected to work each week (e.g., M-F). If unknown, leave blank.

Required to be on Campus (staff only) – If known, please select Yes or No on the radio buttons.

Salary Range – If known, please enter the designated salary range for the position, otherwise leave blank.

Funding Source (*) – If known, type the number of the funding source in the text field. Select the magnifying glass (**Q**) to search for that funding source. The name and number of the funding source will populate the blue box beneath the funding source field when the valid number is identified.

POSITION DETAILS (*=Required)

Please describe as clearly and concisely as possible all information that would be important to fully understand the role and scope of the position. This includes the minimum levels generally necessary to effectively handle the job's essential functions, plus the preferred qualifications (levels for education and work experience).

Job Summary (*) – Verify that the job summary describes the basic function of the position. Make necessary changes.

Benefits of Working at Elon – This field is pre-populated. No action is necessary.

Minimum Required Education and Experience (*) – Verify that the minimum required education and experience are correct. Make necessary changes.

Preferred Education and Experience – Verify that the preferred education and experience qualifications are correct. If blank, you may add the preferred qualifications.

Required Other Training, Certifications, or Licensing - Verify that the required other training, certifications, or licensing are correct. If blank, you may add the requirements for the position.

Knowledge, Skills, Abilities – If known, verify the required knowledge, skills, and abilities are correct. If blank, you may add the preferred qualifications.

POSITION DUTIES (*=Required)

1. On the specific job duties, you must click **Edit** to revise the duties / responsibilities or the percentage of time for each duty.

DB DUTIE	S			
6 of time	Duties / Responsibilities	Essential / 🔪 Marginal		•
70	Primary Job Duty	Essential	Edit	Remove
20	Secondary Job Duty	Essential	Edit	Remove
10	Other Duties As Assigned	Essential	Edit	Remove

- 2. You also have the option to remove an area of duties / responsibilities.
- 3. To add new position duties, select the **New** button beneath the existing duties.

JOB DUTIE	S			
% of time	Duties / Responsibilities	Essential / Marginal		
70	Primary Job Duty	Essential	Edit	Remove
20	Secondary Job Duty	Essential	Edit	Remove
10	Other Duties As Assigned	Essential	Edit	Remove

How to Create a Search Committee

SEARCH COMMITTEE DETAILS

- 1. Type the name of the **Search Committee Chair** in the text field.
- 2. Click on the magnifying glass (**Q**) to search for that user. An email address will populate the blue box beneath the Search Committee Chair's name when the user is found. Use the magnifying glass to help you easily search for Elon employees.

SEARCH COMMITTEE DETAILS			
Search Committee Chair:		Q7	
	No user sele	ected.	

3. To add Search Committee Members, click the **Add Search Committee Member** button. Please remember to allow pop-ups within your browser, because this action causes a pop-up window to appear.

SEARCH COMMITTEE DETAILS		
Search Committee Chair:		Q 🖉
	No user selected.	
Search Committee Members: Add Search Committee Member		

4. In the pop-up window, conduct a search of PageUp users to add an individual as a search committee member by entering search criteria and clicking the **Search** button.

Search - Google Chrome		-		×
elon.dc4.pageuppeople.com/v5.3/provid	er/multiSearchField/searchDia	logGrid	.asp?sD	ata
First name:	Preferred name:			
Last name:	Team:			

- 5. Once you locate a search committee member's name, click **Add** (blue text) to the right of the name. This will add the name to the SEARCH COMMITTEE DETAILS section. You can search and add multiple times within the same window.
- 6. Reach out to HR's Compensation and Recruitment Team (<u>compandrecruitment@elon.edu</u>) to add external users to search committees.
- 7. Once you are finished, click **Done** at the bottom left corner of the pop-up window to close the window. PageUp will remain open.

● elon.dc4.pageuppeople.com/v5.3/provider/multiSearchField/searchdialoggrid.asp?sData First name: Preferred name: cory cory Last name: Team: potter search First name Preferred name ▼ Team Cory Cory Add	Search - Googl	e Chrome			-		×
cory cory Last name: Team: potter	elon.dc4.pa	geuppeople.com/v5.3	/provider/multi	SearchField/searchdial	loggrid.a	sp?sDat	a
Last name: Team: potter Search First name Preferred name Last name Veram	First name:		Pref	erred name:			-
potter Search First name Preferred name Last name Team	cory		co	ory			
Search First name Preferred name Last name Team	Last name:		Tear	n:			
First name Preferred name Last name 🔻 Team	potter						
	Search						
Cory Cory Potter Human Resources Add	First name	Preferred name	Last name 🔻	Team			
	Cory	Cory	Potter	Human Resources		Add	
Page 1 of 1 Records 1 to 1 of 1	Page 1 of 1			R	ecords 1 t	to 1 of 1	
		\frown					Ŧ
Done Add new search committee member		Done Add	l new search co	mmittee member			

8. To remove search committee members, click on **Remove** (blue text) to the right of the search committee member's name. You also have the option to **Remove all.**

	SEARCH COMMITTEE DETAI	LS
Search Committee Chair:	Stephanie Page	Q 🖉
	Email address: spage@elon.edu	~
Search Committee Members:		
Add Search Committee Member		
Recipient		
Human Resources:		
Cory Potter		
Bruce Cottrill		

POSTING DETAILS (*=Required)

Date Opened – Enter the date when the position opened. You can click on the calendar icon (**m**) to select a date from a calendar.

Date Filled – Enter the date when the position was filled. You can click on the calendar icon () to select a date from a calendar.

Open Until Filled – Select **Yes** or **No** from the dropdown list.

Posting to Close – If known, enter a date and time when the job posting will close. You can click on the calendar icon (iii) to select a date from a calendar. Be sure to select AM or PM after selecting a time.

Posting Location (*) – From the dropdown list, select where the position will be located; Elon University Campus, Elon University Campus – Greensboro, or Off-Campus.

Posting Location:*	Select
	Select Elon University Campus
	Elon University Campus - Greensboro Off-Campus

If you plan to advertise externally, please indicate the advertising sources (*) – Check the boxes of the external advertising sources you plan to use.

If you plan to advertise externally, please indicate	Career Site	□ HigherEd Jobs
the advertising sources:*	HERC	Educause
	🗆 Inside Higher Ed	Diverse Education
	Black PhD Network	□ Asians in Higher Ed
		The Chronicle

Please List Any Other Sources – Add the names of the additional advertising source that you plan to use.

Account for Ad (*) – Add the Elon account number to be charged for the costs incurred for advertising the position.

Form – From the dropdown list,

- Select the <u>Staff Application Form</u> if applicants are to fill out a brief application form with essential questions and upload a cover letter, resume or curriculum vitae, and a list of references. <u>or</u>
- Select the <u>Staff Application Form No Resume</u> if applicants are not expected to upload a cover letter, resume or curriculum vitae, and a list of references. Instead, applicants will complete a full application in lieu of additional documents.

Please remember to allow pop-ups within your browser. You can preview the application form by clicking on the **Preview** button. A pop-up window with the application will appear.

	Form:	Elo	n Application form 🗸 🗸	Preview	Question Library
Preview	r form - Google Chrome				- 🗆 ×
🔒 elon.	dc4.pageuppeople.com/v5.3/provider/manageJobs/prev	iewForm.as	?IFormID=47&sFormType=appForm		
Form	Elon Application form	Preview			Print
Page 1	of 6: Applicant Information				
Shift(s) a	vailable to work		Select 🗸		
Schedule	e available to work		Select 🗸		
Date ava	ilable to start work*		Day 💙 Month 💙		
Do you h	nave relatives working/studying at Elon?				
○Yes ○No					
	rovide name(s), relationship and department:				
					1

Optional Step: Adding Questions from the Question Library

1. The Question Library is accessed by clicking on **Question Library** after you have selected the appropriate application form.



2. A pop-up window will appear with a list of questions in the library. Click the **+ Add** button next to any questions you wish to add to the application for this job.

			ere	٩	
Pages					
All	\$	Library	Selected		4F ~
lease provide your references Required)					Add
Please provide your references Optional)					Add
Please provide your letters of ecommendation (Required)	La	st used Oct 17, 2023			Add
Please provide your letters of ecommendation (Optional)					Add
Please provide any additional requi upporting documents	ired La	st used Oct 23, 202	3		Add

- 3. Click Save or Cancel once you have made your selections.
- 4. Once the pop-up window has disappeared, you can click on the **Preview** button to view the application with your selected application form and questions from the **Question Library**.



NOTE: If you choose to customize the application using the Question Library, it will create a new form title to incorporate the requisition number for which the application was customized.

Special Instructions to Applicants – If there are any special circumstances for the applicants to consider (e.g. must live in on-campus housing), enter the special instructions in the text box.

Advertising Text (*)

- 1. Although you can type in or copy and paste an advertisement directly into the text box, you can also click on the **Generate Description** button.
- 2. The advertising text will appear in the editable text box.



- 3. You may edit the advertising text even if you chose to click on the **Generate Description** button.
- 4. Be sure to scroll to the bottom of the page and click on one of the **Save** buttons to ensure your advertising text edits are captured. It is recommended that you click **Save a draft** or **Save** so you can continue to set up the approval workflow for the job requisition.

Save a draft	Save	Save & exit	Cancel

Posting to the Elon Careers Website

To automatically post the position to the Elon Careers website, do the following:

1. Selecting the "Sourcing" tab under the new position title

New job			
Position info Notes	Sourcing Documents		
Add sourcing channels	original dvanced options		
Source	Opening date	Closing date	

- 2. Click on the "Add Sourcing Channels" button.
- 3. Enter the required posting opening date, the application form required.
- 4. Copy the position summary into the "Summary" field.
- 5. Please provide any supplemental information that is not pre-populated, including the search category that you would like the posting to appear under on the website.
- 6. Click "**Save**" once all required information has been provided. The posting approval process must be completed *prior to* the position posting to the Elon careers site. HR will receive a notification once the position receives approval and will use the website checkbox in the top left to initiate the website posting.

Sourcing channe	els: Website		
Website	Opening date: *	at 9 V: 00 V AM V Eastern Standard Time	Apply job template
	Closing date:	at 11 v : 55 v PM v Eastern Standard Time	Locations:
	Title: * Summary: *	Human Resources Ambassador	Greensboro Greensboro Greensboro Off-Campus
	Design template: Text to appear in Job Ad: *	Default 👻	Search categories: * -Ungrouped Select all
		B I U S ■ · ⊞ · ⊡ ⊡ Formats · A · B · ∂ ⊠ to ⊞ · I ↔	 Academic Affairs Advancement Services
		Title: Hyman Resources Ambassador	
		Position Type: Staff Full-Time	Communication & Marketing
		Days Per Week:	Facilities
		Hours Per Week:	Finance Health Services

Approval Process for Posting

USERS AND APPROVALS (*=Required)

In this section, add necessary users and approvers to your job requisition.

Department Admin – The Department Admin can act as a proxy for Hiring Managers and can perform all the actions that a Hiring Manager can perform; however, they are not able to view the requested salary field. The salary field would need to be completed by the Hiring Manager in the first approval step.

Hiring Manager (*) – A Hiring Manager must be identified for each requisition. Search for the appropriate Hiring Manager by name and then click the magnifying glass to search for the person's email address. If found, the user's email address will appear in a blue box.

	USERS AND APPROVALS	
Hiring Manager:*	Cory Potter	
	Email address: cpotter9@elon.edu	

Approval Process (*) – Using the dropdown list, select the **Approval Process** that best matches the job requisition needs based on the specific division.

- 1. When you select a job requisition **Approval Process** (e.g. Finance and Administration), the list of approver types required for that process will generate in the box beneath the selection. There is a slight pause in the software as the approval workflow generates. This is typical.
 - a. Some employees in the workflow (e.g. Budget, Compensation and Recruitment, Budget) will prepopulate. If an approver's name or email address pre-populates, please do not change the approver without prior discussions with Human Resources.
 - b. Other approvers in the workflow will need to be identified. NOTE: There is a scrollbar to the right of the approver window. Be sure to use the scrollbar to view all approvers.
- 2. To add an approver, type a name into the text box and select the magnifying glass (**Q**) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

	USERS AND APPROVALS
Department Admin:	Q /
	No user selected
Hiring Manager:*	Cory Potter
	Email address: cpotter9@elon.edu v
Approval process:*	Finance and Administration
2. Department Head:	Q. Ø
	No user selected.

Optional Step: Adding Notes to a Position Requisition

Toward the bottom of the screen (above the **Save** buttons), you can click on **Next page** > (blue text) to get to the **Notes** screen.

Please fill in all ma		t page	an asterisk (*).
Save a draft	Save	Save and exit	Cancel

To add a special instructional note to the position description (such a split funding), select Note from the dropdown list.

Position info	Notes	Sourcing	Documents				
Add: Select	~						
Select	-						
Note							
Hold day	y						
				Nex	t page >		

A pop-up window appears. You can add a note in the text box. You are given the option to email the note (special instructions) to users in the active directory. Click **Save** (or **Cancel**) at the bottom of the pop-up window once you have added details.

dd note		ł
Mar and		
Note:*		
File:	Upload file	
E-mail this note to:		
User:	Q Ø	
Other e-mail:		
	Save Cancel	

Once you click the **Save** button, you have the options to (a) edit the note, (b) delete the note, (c) add another note, (d) navigate to the **Position Info** tab, or (e) navigate to the **Documents tab** (by clicking on **Next page >** or clicking on **Documents** on the menu.

New job		
Position info Notes Sourcing	Documents	
Add: Select 🗸		
May 17, 2023, 8:44am TEST NOTE		Cory Potter
		Edit Delete
	Next page>	
	_	
	Save a draft Save Save and exit Cancel	

OR

Selecting Save or Save and Exit at the bottom of the page will initiate the approval process.



Optional Step: Adding Documents to a Position Requisition

Navigate to the **Documents tab** by clicking on **Documents** on the menu, after adding optional notes and sourcing (see sections above).

New job Position info Notes Sourcing		
Select Document	Date Size Category	
Save a draft Save Save a	and exit Cancel	

Select Document from a file from the dropdown list to add a document (such as an updated organizational chart)

New job Position info Notes Sourcing	Documents				
Select Select Document from a file Document from library		Date	Size	Category	
	Save a draft Save S	Save and exit Cancel			

A pop-up window appears with an Upload file button.

🗢 Upload a new document - PageUp	- Work - Microsoft Edge — 🗆	×
https://adminuat.dc4.pag	euppeople.com/FileUpload?sData=UFUtVjMtqib1xTQq	A ^N
Upload a new document		₽
File:* Document category:* Title:	Position description	
Save and ac	ld another Save and close Close	

Next, click **Save and add another** to add another document to the position description. Click **Save and close** to save your document and close the pop-up window. Click **Close** to exit the pop-up window without saving the document. Next, selecting **Save** or **Save and Exit** at the bottom of the page will initiate the approval process.



Approve a Job Card / Requisition

Via Email

When a job requisition has been allocated to an employee for approval (approver), that approver will receive an email. The approver has the option to reply to the email with the word "**Approve**" as an option. The approver should already know the specific details to take this action. The word "**Approve**" must be spelled correctly (not approved or "I approve"). It is not case-sensitive.

Hi Cory,
A job requisition for position Job Number: has been allocated to you for approval.
You can approve the requisition as is or make amendments as required before approving. Please discuss amendments with the "Hiring Manager". You can also decline the job if this requisition is not approved.
Quick reference job details
Job Title:
Department:
Manager:
Worktype: Staff Part-Time
Duration:
Payscale:
To approve the job requisition via email, please reply to this email with the word "Approve".
Please Note: the word "Approve" is the only valid response accepted via the email job approval option.
OR
To view the job requisition in more detail, approve, provide comment or decline, please click the following link to login <u>View Job Requisition</u>
Kind regards,
Elon University Human Resources Elon University

The email sent to the approver contains a notice for the approver to log in to 1) receive more detail, 2) approve, 3) provide comment, or 4) decline.

Within PageUp

There are multiple ways to get to the approval screen within PageUp.

- 1. Via an Email
 - a. Click on the View Job Requisition link provided in a system-generated email.

To view the job requisition in more detail, approve, provide comment or decline, please click the following link to login <u>View Job Requisition</u>
Kind regards,
Elon University Human Resources Elon University

b. You will need to use Elon's Single Sign On (SSO) process to log into PageUp.

c. Once you are viewing the job requisition, scroll to the bottom of the page to click on the **Approve** button.



- 2. My Dashboard
 - a. On the **My Dashboard** screen, find the **Approvals** tile.
 - b. Click on the blue number (if greater than zero) beside "Jobs awaiting your approval".

My Dashboard Welcome Cory, this is your Dashboard where you	will see all your tasks organized in various st	ages.	
Bosicion Description My position description - Under review Manage position descriptions and devier	New job 2. Jobs open 22 Team jobs open Rew jak	Approvals 3. Anton availing your approval 3. Appended	Guidelines / Tips ClashREE to access online reference indents

- c. Click **View** to the right of the job requisition you are wanting to approve.
- d. Once you are viewing the specific job requisition, scroll to the bottom of the page to click on the **Approve** button.



- 3. (Hiring Managers)
 - a. Within the **My PageUp** Dashboard view, Hiring Managers have an area called **Manager Activities** on the right-hand side.

∃ PageUp.		Jobs People Reports v Settings Recent items v Oulick search Q Sara	h ~ 🕐
Dashboard			•
illi Current jobs		A 😡 Primary teams & users	~
	Image: All Notifications Image:	Int. Manager Activities	^
Approved	Academic Coordinator Requisition Number: 492229 Timothy Bryant	Jobs requiring panel review Positions: 0 Vacancies: 0 Jobs with applicants for review	
Approved	Test Human Resources Coordinator	1 New hires	

- b. Click on the linked text or number on the line entitled "Jobs awaiting your approval".
- c. Click View (blue text) to the right of the position description you are wanting to approve.

= PageL	Jp.◆	F	Recent items V Quick	search 🕻	Cory 🗸 ? 🗡
Manage a					Clear Search
Pending Date raised	Reference No.	Job title 🔺	Hiring Manager	New	Replacement
Apr 13, 2023	492254	Director of Arts/Communications	Cory Potter	0	

d. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Approve** button.



- 4. To use the Side Menu:
 - a. Click on the Side Menu and select **My Job Approvals**.
 - b. Next, on the Manage Approvals screen select Pending from the Approval Status dropdown list.
 - c. Then, click the **Search** button on the right side of the screen.

■ PageUp.			Jobs People Reports ∨	Settings Rec	cent items v Quick search	Q Sarah v 💡 v
Manage approva	als					
Approval status						Clear Search
All	-					
Pending	ference No.	Job title 🔺	Hiring Manager	New	Replacement	
Completed	+2249	Director of Arts/Communications	Jackie Riffle	0	1	Viev
Feb 21, 2023	492236	Director of Arts/Communications	Timothy Bryant	0	0	Vie

- d. Click View to the right of the job requisition you are wanting to approve.
- e. Once you are viewing the specific job requisition, scroll to the bottom of the page to click on the **Approve** button.

	\frown		
Save a draft	Approve	Decline	Cancel

Decline a Job

There are multiple ways to get to the approval screen within PageUp.

- 1. Via an Email
 - a. Click on the View Job Requisition link provided in a system-generated email.



- b. You will need to use Elon's Single Sign On (SSO) process to log into PageUp.
- c. Once you are viewing the job requisition, scroll to the bottom of the page to click on the **Decline** button.



d. Please remember to allow pop-ups within your browser. As an approver, once you select **Decline** a popup box appears requiring a reason as to why the job has been declined. Select the appropriate reason from the dropdown list.

🗢 Decline - Google Chrome	-		×
elon.dc4.pageuppeople.com/beta/v5.3/p	rovider	/manag	eJ
Please select a reason as to why the job declined:*	has bee	en	
No budget 🗸 🗸			
Select			
No budget			
Incorrect information			
Job not approved for posting			
			4
Save Cancel			

- e. There is a textbox to provide further reason details.
- f. Click **Save** and the system will return to the job requisition screen.
- g. If a request has been declined, once the corrections have been made the Hiring Manager should navigate to the USERS AND APPROVALS section and scroll down to reveal the **Restart** button.

	USERS AND APPROVALS
Department Admin:	Q 🖉
	No user selected.
Hiring Manager:*	Cory Potter 🔍 🦉
	Email address: cpotter9@elon.edu
Approval process:*	Finance and Administration
2. Department Head:	Cory Potter 🖤 Approved Apr 24, 2023
3. Human Resources - Compensation:	Approved Apr 24, 2023
4. Budget:	Declined Apr 24, 2023
5. VP:	
6. Human Resources - Operations:	
Reason for declining the job: No budget Additional comments: This is 10K over.	
	restart

h. A pop-up will appear asking if you are sure you want to restart the approval process. Click **OK**.



- i. Navigate to the USERS AND APPROVALS section and select a new **Approval Process** from the dropdown list.
- 2. My Dashboard
 - a. On the My Dashboard screen, find the Approvals tile.
 - b. Click on the blue number (if greater than zero) beside "Jobs awaiting your approval".

ELON UNIVERSITY | Human Resources

My Dashboard Welcome Cory, this is your Dashboard where you	u will see all your tasks organized in various sta	ages.	
Position Description My position description - Under review (Manage position descriptions and revisit -)	New job 2. Jobs open 22 Team jobs open New jak	Approvals 3. Jobs eventing your reperson 3. Approved	Guidelines / Tips Click HER: Io access online reference instetials

- c. Click View to the right of the position description you are wanting to decline.
- d. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Decline** button.



e. Please remember to allow pop-ups within your browser. As an approver, once you select **Decline** a popup box appears requiring a reason as to why the job has been declined. Select the appropriate reason from the dropdown list.

Decline - Google Chrome		-		×
elon.dc4.pageuppeople.com/beta	/v5.3/p	provider	/manag	eJ
Please select a reason as to why t declined:*	he job	has be	en	
No budget	-			
Select				
No budget				
Incorrect information				
Job not approved for posting				
				11
Save Ca	ncel			

- f. There is a textbox to provide further reason details.
- g. Click **Save** and the system will return to the job requisition screen.
- h. If a request has been declined, once the corrections have been made the Hiring Manager should navigate to the USERS AND APPROVALS section and scroll down to reveal the **Restart** button.

	USERS AND APPROVALS		
Department Admin:		Q /	
	No user selected.		
Hiring Manager:*	Cory Potter	Q 🍠	
	Email address: cpotter9@elon.edu	<u>ı</u> ×	
Approval process:*	Finance and Administration		
2. Department Head:	Cory Potter 💘	Approved Apr 24,	2023
3. Human Resources - Compensation:	Cory Potter 🖌	Approved Apr 24,	2023
4. Budget:	Cory Potter 🗴 I	Declined Apr 24, 2	023
5. VP:	Cory Potter		
6. Human Resources - Operations:	Cory Potter		
Reason for declining the job: No budget Additional comments: This is 10K over.			
	restart		

i. A pop-up will appear asking if you are sure you want to restart the approval process. Click **OK**.



- j. Navigate to the **USERS AND APPROVALS** section and select a new **Approval Process** from the dropdown list.
- 3. (Hiring Managers)
 - a. Within the **My PageUp** Dashboard view, Hiring Managers have an area called **Manager Activities** on the right-hand side

∃ PageUp.		Jobs People Reports V Settings	Recent items v Quick search Q Sarah v 📀 V
Dashboard			₽ 0
🛍 Current jobs		^	♀ Primary teams & users
	4 1 2 1 0 Total All hothfrations Approved Beview Pre-Offer		Lat. Manager Activities
Approved	Academic Coordinator Requisition Number: 492229 Timothy Bryant	Positions: 0 Vacancies: 0	Jobs requiring panel review Jobs with applicants for review
Approved	Test Human Resources Coordinator		1 New hires

- b. Click on the linked text or number on the line entitled "Jobs awaiting your approval".
- c. Click View to the right of the job requisition you are wanting to decline.
- d. Once you are viewing the specific job requisition, scroll to the bottom of the page to click on the **Decline** button.



- 4. To use the Side Menu:
 - a. Click on the Side menu and select My Job Approvals.
 - b. Next, on the Manage Approvals screen select Pending from the Approval Status dropdown list.
 - c. Then, click the **Search** button on the right side of the screen.

∃ PageUp.			Jobs People Reports ∨	Settings Re	cent items v Quick search (Sarah v ? V
Manage approvals						
Approval status	~					Clear Search
All Pending	ference No.	Job title 🔺	Hiring Manager	New	Replacement	
Completed	+2249	Director of Arts/Communications	Jackie Riffle	0	1	View
Feb 21, 2023	492236	Director of Arts/Communications	Timothy Bryant	0	0	View

- d. Click View to the right of the position description you are wanting to decline.
- e. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Decline** button.



f. Please remember to allow pop-ups within your browser. As an approver, once you select **Decline** a popup box appears requiring a reason as to why the job has been declined. Select the appropriate reason from the dropdown list.

elon.dc4.pageuppeople.com/beta/	v5.3/provid	er/manag	jeJ
lease select a reason as to why th eclined:*	e job has b	een	
No budget 🗸]		
Select	1		
No budget			
Incorrect information			
Job not approved for posting			
			11

- g. There is a textbox to provide further reason details.
- h. Click Save and the system will return to the job requisition screen.
- i. If a request has been declined, once the corrections have been made the Hiring Manager should navigate to the USERS AND APPROVALS section and scroll down to reveal the **Restart** button.

	USERS AND APPROVALS
Department Admin:	Q Ø
	No user selected.
Hiring Manager:*	Cory Potter Q 🍠
	Email address: cpotter9@elon.edu v
Approval process:*	Finance and Administration
2. Department Head:	Cory Potter 🖤 Approved Apr 24,
3. Human Resources - Compensation:	Cory Potter 🖋 Approved Apr 24,
4. Budget:	Cory Potter 🗴 Declined Apr 24, 2
5. VP:	Cory Potter
6. Human Resources - Operations:	Cory Potter
Reason for declining the job: No budget Additional comments: This is 10K over.	
	restart

j. A pop-up will appear asking if you are sure you want to restart the approval process. Click **OK**.



k. Navigate to the **USERS AND APPROVALS** section and select a new **Approval Process** from the dropdown list.

Restart an Approval Process

IMPORTANT NOTE: Once a job requisition is fully approved, you are not able to restart an approval process in instances when you discover that something in the job requisition needs changed, such as a title. In these cases, please contact HR's Compensation and Recruitment Team at <u>compandrecruitment@elon.edu</u>. They can assist with restarting the approval process.

?

Assign a Different Approver

Hiring Managers: There are multiple ways to get to the specific job for which you want to assign a different approver if the approval workflow has not been fully approved (completed):

• Click on **Jobs** in the quick access menu.



■ PageUp. Jobs People Reports ∨ Recent Rems ∨ Mary ∨ Select Manage Jobs in the left Side menu.



a. Set the search criteria status to **Pending Approval** and click **Search** to find the position.

≡ Page∪p. ◆ Jobs	•
New Job Select a bulk action *	
Status: Pending approval Clear Search	
Types: All	

b. Click on the title of the position (blue text) in which you need to change approvers.

∃ Page Up.							loL
New job Select a bulk action 🗸							
Status: Pending approval Clear Search Types: All Show other search criteria							
Job No. Date created User Title	Area	Department Status No. Positions	Applications	Opening date	Closing date	Hiring manager	Sourced
492225 Apr 20, 2022 RR Director of Arts/Communications	Division 3	Department 2 Pendinį 2	6	Nov 22, 2022	Dec 16, 2022	Harry Hire	×
492257 Apr 25, 2023 CP Ovendor Relations Specialist	Elon Dining	Pendinį 1	0			Mary Sullivan	×

c. Scroll down to the USERS AND APPROVALS section and click **Edit** button to edit the approvers in the workflow. In some cases, you may have to scroll down *within* the Approval process text window to reveal the **Edit** button.

Approval process:*	Finance and Administration	
1. Hiring Manager:	Mary Sullivan () You are here Resend email to approver	Â
2. Department Head:		
3. Human Resources - Compensation:		
4. Budget:		
5. VP:		
6. Human Resources - Operations:		
	Edit Cancel	

d. Please remember to allow pop-ups within your browser. A pop-up window will appear. In the pop-up window, you can 1) Type in the name of the user, 2) search for the user by clicking on the binoculars (A), and 3) clear an entry by clicking on the eraser (

1. Hiring Manager:		<i>8</i> 43	2
	E-mail:		~
2. Department Head:		#	Q
	No selected		
 Human Resources - Compensation: 	Compensation and Recruit	#	Q
	E-mail: compandrecruitment@elon.e	edu	~
4. Budget:		#	2
	No selected		
5. VP:	J	#	2
	E-mail:		~
 Human Resources - Operations: 	Human Resources Operati	#	Q
	E-mail: HROperations@elon.e	edu	~
	Save Cancel		

- e. Click **Save** at the bottom of the pop-up window once you have assigned the revised approver(s) in the workflow.
- f. The changes will appear in the Approval process workflow within the position requisition.
- g. An email is generated to the user being replaced of the alternate approver assignment.



- On the **My Dashboard** screen, find the **Approvals** tile.
 - a. Click on the blue number (if greater than zero) beside "Jobs awaiting your approval".



b. Click **View** to the right of the Job Title that you are wanting to assign a different approver.



c. Scroll down to the USERS AND APPROVALS section and click **Edit** button to edit the approvers in the workflow. In some cases, you may have to scroll down *within* the Approval process text window to reveal the **Edit** button.

Approval process:*	Finance and Administration
1. Hiring Manager:	• You are here • * * * * * * * * * * * * * * * * * *
2. Department Head:	
3. Human Resources - Compensation:	
4. Budget:	
5. VP:	
6. Human Resources - Operations:	
	Edit Cancel

- 1) Please remember to allow pop-ups within your browser. A pop-up window will appear. In the pop-up window, you can 1) Type in the name of the user, 2) search for the user by clicking on the binoculars
 - (\implies), and 3) clear an entry by clicking on the eraser (\checkmark).

🗢 - PageUp People - Google Chrome				-		×
elon.dc4.pageuppeople.com/v5	.3/provider/approvalProcess/EditA	ppro	vers.a	spx?sD	ata=UFl	Jt
1. Hiring Manager:		#	Q			•
2. Department Head:	E-mail:	# 3	~			
	No selected	ara	Z			
 Human Resources - Compensation: 	Compensation and Recruit	4	2			
	E-mail: compandrecruitment@elon.e	du	~			
4. Budget:		A	2			
	No selected					
5. VP:		A	2			
	E-mail:		~			
6. Human Resources - Operations:	Human Resources Operati	A	2			
	E-mail: HROperations@elon.e	du	~			
	Save Cancel					*

- 2) Click **Save** at the bottom of the pop-up window once you have assigned the revised approver(s) in the workflow.
- 3) The changes will appear in the Approval process workflow within the position requisition.
- 4) An email is generated to the user being replaced of the alternate approver assignment.

[EXT] Alternative approver allocated for 492259 - Hu.	
compandrecruitment@elon.edu <compan< td=""> 5 ↔ To Oray Potter 1:04 (i) Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.</compan<>	•••• 1 PM
External Message	
Dear Cory Potter,	
An alternative approver has been allocated for 492259 - Human Resources Ambassador. Please disregard any previous requests to approve this job.	

Cancel an Approval Process

Hiring Managers - If you need to cancel a position description or position requisition (posting) request:

- 1. Open the position you wish to cancel.
- 2. Scroll down to the USERS AND APPROVALS section.
- 3. In the Approval Process workflow box, scroll to the bottom of the box and click the Cancel button.

Department Admin:		Q /
	No user selected.	
Hiring Manager:*	Mary Sullivan Email address: msullivan56@elon.	Q Z
Approval process:*	Finance and Administration	
1. Hiring Manager:		Mary Sullivan 🙂 You are here Resend email to approver
2. Department Head:		Cory Potter
3. Human Resources - Compensation and Recruitm	ent:	Cory Potter
4. Budget:		Cory Potter
5. VP:		Cory Potter
6. Human Resources - Compensation:		Stormy Shapiro
	Edit Cancel	

- 4. Please remember to allow pop-ups within your browser. A pop-up warning window will appear. In the pop-up window, you are required to provide a reason for cancelling the approval process.
- 5. After entering your reason for cancelling, click the **Okay** button.



6. The PageUp system returns to the position information tab for that position. A new approval process can be initiated, and edits can be made.

Recruiting Sources

1. Within a job requisition, navigate to the POSTING DETAILS section.

	POSTING DETA	ILS
Date opened:	Apr 13, 2023	iii
Date filled:		₩
Open Until Filled:	Select	Ŧ
Posting to Close:		at Hr 🗙 Min 🗸 AM 🖌
Posting Location:*	Elon University Campus	~
If you plan to advertise externally, please indicate the advertising sources:*	Career Site HERC Inside Higher Ed Black PhD Network NCAA	☐ HigherEd Jobs ☐ Educause ☐ Diverse Education ☐ Asians in Higher Ed ☐ The Chronicle
Please List Any Other Sources:		
Account for Ad:*	123321	

2. **If you plan to advertise externally, please indicate the advertising sources (*)** – Check the boxes of the external advertising sources you plan to use.

If you plan to advertise externally, please indicate	Career Site	□ HigherEd Jobs
the advertising sources:*	HERC	Educause
	🗆 Inside Higher Ed	Diverse Education
	Black PhD Network	□ Asians in Higher Ed
	□ NCAA	The Chronicle

- 3. Please List Any Other Sources Add the names of the additional advertising source that you plan to use.
- 4. Account for ad (*) Add the Elon account number to be charged for the costs incurred for advertising the position.

Review Applicants

Depending on the role you have in the recruitment process, you will have access to review applicants for the positions you are recruiting.

Navigate to the Applicants

There are several options to navigate to the applicants.

• From the Quick Access Menu, the '**People'** quick link will lead you to the list of applicants <u>for the open job that you</u> <u>most recently accessed</u>.



2. Select a position from the dropdown to view the applicants for that position.



492249 - Director of Arts/Communication

• From the My Dashboard screen, click on Review Applications (blue text) within the Applicant Progress Board tile.



- OR
- From the Side Menu, select **Manage Applications** to view the last job you were working in.
 - 1. In the **Applicant Progress Board** view, you can see all the applicants for a specific position, along with the status category that each applicant is current in.

ELON UNIVERSITY | Human Resources

492239 - test-counselor `	Job status: Background Checking Position	h: 1 Hiring Manager: Laura Kappert View job	b			How to use Manage Application
			Swit	tch to List View	• Card	Settings Anonymize Profiles <
Quick filters	New (0) 000	Does Not Meet Requireme 🔿 🔿	Under Review by Search Co 🔿 🔿	Review Unsuccessful (3)	000	Recommend for Interview (0) 🔿 🔿
Statuses with Applications			• Lulu Kaper 📃 …	Charlie Brown		
Shortlisted Applicants			0 Liberty 🔛 🛄	Elon College		
Current Application Statuses						
Internal Applications			Form Résumé Cover letter Other documents	Form Résumé		
Flags v			Other documents	Change status C	000	
			Unsuccessful v Progress v 🔿 🔿			
Application status Select all			Randy Recruiter			
Unsorted applications (0) 🚱			© Elon 🔤 🗋			
Incomplete (0)			Accounts Payable Spe	Form Résumé		
Submitted (0)					_	
New (0)			Form Résumé Cover letter Other documents	Change status	00	
Does Not Meet Requirements (0)			Other documents	Cory Potter		
Under Review by Search Committee (3)			Unsuccessful v Progress v 🔿 🔿	Danville Director		
Review Unsuccessful (3)			Reid Fleming ····	Director	_	
Recommend for Interview (0)			Gibsonville	Form Résumé		
Interviewed, Not Hired (0)			 Milkman 			

• You can click on an applicant's name to open a screen to view details about the applicant including any applications on file, view the resume or the application form, or view the history of actions.

Mrs Lulu Kaj	per 🛡			E.	Actions v
/iew profile View ret	ferences A	dd flags			
Address			Phone		
	Liberty, No	rth Carolina			
	27298, Uni	ted States			
Cell			E-mail		
Number	1042		Original source	Burlington Times-News	
e-Zines comms hold	No				
			esume		
	History	Scheduled emails Ro	esume		
Applications	History	Scheduled emails Ro	Status changed Feb 27, 2023	Offer	
Applications 492239 - te 	History	Scheduled emails Ro		Offer No offer	
Applications (1) 492239 - te Date submitted	History	Scheduled emails Ro r Applied via	Status changed Feb 27, 2023		

• If you want to view the applicants for another position for which you are responsible, you can click on the dropdown arrow beside the job title in the upper left corner of the screen to switch to that position.



• You can choose to click on **Manage Applications** (blue text) in the upper right on the screen.

≡ PageUp.	Jobs	People Reports v	Recent items 🗸	Mary 🗸 ? 🗡
492239 - test-counselor ' Job status: Background Checking Position: 1 Hiring Manage	:	View job	How to use	Manage Applications

This brings up a list of all the applicants for that position.

ew applicant Sel	ect a bulk action 👻															List	View B	oard v
test-counseld	or (492239)																	
earch Results																		
select 💽 Submitted	Status Pref Name	First name	Last name Ranking	Phone	Mobile	Email	Country State City	Ref.	Score	Dup (Undisclosed?	Employee	Source	Sub-source	Flags •			
Feb 27, 2023	Review Un: Charlie	Charlie	Brown		33626324	jacqueline.riffle@gmail.com	United St North Elon	Coll	0	F	False	۵	Internet	Website	G	110	View applic	ation
Feb 27, 2023	Review Un: Cory	Cory	Potter	40741676	40741676	bechurchva@gmail.com	United St Virgini Dan	wille	0	F	False		Internet	HEJ	G	0.0	View applic	ation
Feb 27, 2023	Backgroun Jamie	• Jamie	Canada		33627855	ocanada28@hotmail.com	United St North Elon	- &	0	F	False	٢	Other	EmpRef	G	110	View applic	ation
Feb 27, 2023	Under Revi Lulu	● Lulu	Kaper	33627850	33626606	lkappert@elon.edu	United St North Libe	erty	0	F	alse	•	Print	BTN	G	0.0	View applic	ation
Feb 27, 2023	Under Revi Randy	Randy	Recruiter		30454596	bcottrill@elon.edu	United St North Elon		0		alse	۵	Print	BTN	G	110	View applic	ation
Feb 27, 2023	Under Revi Your Grace	Reid	Fleming		232-505-4	tbryant7@elon.edu	United St North Gibs	sonvi	0	F	alse		Internet	Website	6	0.1	View applic	ation
Feb 27, 2023	Review Un: Sarah Davis	Sarah	Davis		33651689	sarahlouisedavis55@gmail.co	United St North Burl	lingtc	0	A F	False	•	Internet	Website	G	0.01	View applic	ation
Feb 27, 2023	Backgroun Yovonie	Yovonie	Johnson		336-278-5	yjohnson4@elon.edu	United St North Elon	1	0	F	alse		Internet	LinkedIn	G	9.0	View applic	ation

2. As an alternate view, you can switch to List View from within the Card View by clicking on Switch to List View button.

∃ PageUp.							Jobs P	eople Repo	rrts ∨ Recent items ∨ Mary ∨	? ~
492239 - test-counselo	r `	Job status: Backgro	und Checking Position	: 1 Hiring Manager: Laura Kappert View job					How to use Manage Applic	cations
						Swite	ch to List View ↓± Sort care	ls 💿 Car	d Settings Anonymize Profiles	
Quick filters	~ 1	New (0)	000	Does Not Meet Requireme	Under Review by Search Co 🔿 🔿	0	Review Unsuccessful (3)	000	Recommend for Interview (0) 🔿 🔿	Int
Statuses with Applications					• Lulu Kaper		Charlie Brown			
Shortlisted Applicants					🔉 Liberty 🔛 📓	1	Elon College			
Current Application Statuses										
Internal Applications					Form Résumé Cover letter		Form Résumé			
Flags v					Other documents					
						_	Change status	000		

• You will initially receive a pop-up window warning that by switching screens you will reset all filters. If you wish to continue, click the **Change View** button. You can also check the box beside "Don't show me this again" prompt.

Change to List Viev	/
By switching to the List View you	ı will reset all filters.
Do you want to continue?	
Don't show me this again	
Cancel	Change view

Once you are in the List View, you have several options to view details from each applicant.

E Pag	eUp.		Jobs	People Repo	rts ∨ Recent iter	ns v Mary v ? v
492239 -	test-counselor V Job sta	us: Background Checking Position: 1 Owne	er: Laura Kappert View Job			Guided tou
≓ Filters	I'm looking for A	· Q			Switch to can	d view 🏠 Table Setting
$\diamond \diamond \diamond$	Applicant name 💲	Flags Application status 🗘	Screening activities 💲	Score 🗘	Documents	Actions
000	 FEB 27 2023 Lulu Kaper Liberty Ikappertælon.edu 3362785085 	Under Review by Search Committee		Application 0%	Resume Form Cover letter Other documents	Progress Decline *
000	FEB 27 2023 • Randy Recruiter • Elon • bcottrill@elon.edu	Under Review by Search Committee		Application 0%	Resume Form Cover letter Other documents	Progress Decline

View an Applicant Card

Hiring Managers have access to view the applicant card which includes the applicant's personal details, job application information, previous history and communications, resumes and application forms, etc.

To choose an applicant in the system:

- 1. Go to Manage applications in the left Side Menu.
- 2. Search for the job and view your applicants.

Ξ Page Up. [♠]			Recent items 🗸 🛛 Mary 🗸
New applicant Select a bulk a	action 🗸		List View Boa
() test-counselor (4922	239)		
Search Results			
Job/campaign:		Q /	Clear Search
	No job selected.		Save search:
Application status:		•	
E-mail:			
First name:			
Last name:			
Reference check status:	All	~	
Applicant number:]	
Current application statuses o	niy: 🗆		
Show other search criteria		Search	

3. Click View Application (blue text) to the right of the applicant to see the applicant card.

vew applicant j ben	ect a bulk action 🛛 👻											List	View Board v
Search Results	ounselor - TES												1
select Submitted			Last name Ranking		Country State City	Ref. Score Du	False	Employee	Other		Flags •	D D 9	View application
COOMer 14, 2022							raise		Outer	NOW		400 14 9	view application
Mar 14, 2023		ElleJohn	Smith	- 0	.cc United St Illinois Chicago	0	False	4	Internet			B B B	View application

- 4. The **Applicant card** (under Applications) contains the Position being reviewed, the status of the applicant, offer status, and any additional Actions.
- 5. Actions may be accessed with the Action button with a dropdown arrow on the right side of the Applicant card.



6. The **Status** lets the reviewer know where in the recruitment process an applicant stands. This may include interviews in process, designation of the success or rejection of an applicant, and recommendation for hire.

		DxHy4%2Ff1dVyXkoQmiMfz6EZ83LhTss`		-
Ms Elle Wood	is 🛡		ā	Actions v
View profile View ref	erences Add flags			
Address	123 Cherry Blossom Dr	Phone	-	
	Washington, DC, District of Colu	mbia		
	20053, United States			
Cell	+1 555.555.5555	E-mail	elonhrcrtest@gmail.com	
Number	1047	Original source	Word of mouth	
e-Zines comms hold	No			
	History Scheduled emails	s Resume		
Applications				
Applications				
	igeUp Coordinator			•••
	igeUp Coordinator Applied via	Status changed Mar 14, 202:	3 Offer	•••
() 492245 - Pa		Status changed Mar 14, 2022 Hiring Proposal (Launch C		•••
1 492245 - Pa Date submitted	Applied via			•••

View an Applicant's Resume and Application Form

Those with permissions to view applicant information can access the submitted resume (if applicable) and/or view the submitted application (referred to as "Form" within PageUp). There are multiple ways to view this information.

1. From the **Board View** or **Card View**, click on the blue **Form** button or the blue **Resume** button. Any other submitted documents can be view here, as well.

Joe Jobhunter Cancun	Yovonie Johnson Elon
Flags	Form Résumé Cover letter Other documents
Unsuccessful v Progress v 🚫 🚫	Change status Progress v 🚫 🚫

2. From the Manage Applications screen, click on one of the options to the right of an applicant to:

PageUp.								Job	s People	e Reports	s ∨ Reci	ent items 🗸	Mary 🗸	?
New applicant Select	t a bulk action 🛛 👻												List View	Board v
Admissions Co	unselor - TEST	(49225)	2)											
Search Results		(-,										L	
Search Results													-	
Colors D. Colorsistend	Status - Brof Mamo	First pares	Last name Ranking	Phone Mobile	Email	Country State	City Def	Undisclosed? E		urco Sub co			·	

From an Applicant Card (see section VIEW AN APPLICANT CARD), the resume and form can be viewed by:
1) clicking on the word Resume to the right of Scheduled emails, or

2) clicking on View (blue word) under the word 'Resume' under the specific position applied to, or3) clicking on View (blue word) under the word 'Form' under the specific position applied to.

Ms Elle Woo	ds ●		Actio
View profile View re	ferences Add flags		
Address	123 Cherry Blossom Dr Washington, DC, District of Columbia 20053, United States	Phone	
Cell	+1 555.555.5555	E-mail	elonhrcrtest@gmail.com
Number	1047	Original source	Word of mouth
e-Zines comms hold	No d		
Applications	History Scheduled emails Res	sume	
() 492245 - P	ageUp Coordinator		•
1 492245 - Pr Date submitted	ageUp Coordinator	Status changed Mar 14, 2023	••

Change the Applicant Status

Department Admins and Hiring Managers have the ability to move applicants to different statuses. There are multiple ways to change the status of an applicant.

- 1. From the **Board View** of a position (see NAVIGATE TO THE APPLICANTS section), you can:
 - 1. **Drag** (hold left mouse button down while hovering over an applicant's card) **and drop** the applicant from one column to another, based on the column headings which represent the possible **statuses** for the applicant.

Ξ Page⊔p.♥													
492252 - Admissions Counselor - TEST V Job status: Pre-Offer Hinting Manager: Mary Sullivan View Job													
filters ^	New (0)	Does Not Meet Requireme 🔿 🔿 🔿	Under Review by Search Co 🔿 🔿 🔿	Review Unsuccessful (0)									
atuses with Applications			• John Smith										
ortlisted Applicants			o Chicago 🛛 🖬 🗋										
urrent Application Statuses			Flags										
ternal Applications			6										
ags 🗸			Form Résumé										
ation status Select all			Unsuccessful v Progress v 🔿 🔿										
sorted applications (0)			·										

NOTE: You can drag the applicant card to the left or to the right to move the person into the appropriate status.

		EST Job status	s: Pre-Offer Hiring Manager: Mary Sullivan 1	Viewjob		
filters	^ New (0)	000	Does Not Meet Requireme	Under Review by Search Co 🚫 🚫	Review Unsuccessful (1)	00
atuses with Applications					John Smith	C.
ortlisted Applicants					Chicago	≤ [
rrent Application Statuses					Flags	
ernal Applications					6	
as v					Form Résumé	

2. Click on the dropdown arrows beside either **Unsuccessful** or **Progress** on the applicant's card to reveal a list of status options.

Under Review by Searc	ch Co 🔿 🔿
• John Smith	C
Ohicago	\
Flags	
6	
Form Réphé	
Unsuccessful Prog	ress

Unsuccessful Statuses to choose from:

<u>Review Unsuccessful</u> – The applicant will not be moved forward if this is selected.

A screen appears to **Confirm Status Change** prompting:

- 1. a communication to the applicant informing the person of your decision (defaulted to **Yes**).
- 2. a **Delay email by** dropdown (required to choose no delay or delay by XXX days)
- 3. a **Review Unsuccessful Reason** dropdown (required)

Review Unsuccessful reason	
Please indicate the reason for select	ing the review unsuccess
Select	~

The choices in the dropdown are:

- Accepted another offer
- Personal reasons
- Company benefits unsatisfactory
- Compensation unsatisfactory
- Unable to relocate
- Staying with current employer
- Does not meet position requirements
- Did not fit with company culture
- Other candidates more suitable
- Background / Reference check requirements not met
- Position filled
- Other
- 4. an area for a **Note**
- 5. an option at the bottom to **Move Now** (blue button) or **Cancel.**

Interviewed, Not Hired – The applicant will not be moved forward if this is selected.

A screen appears to **Confirm Status Change** prompting:

- 1. a communication to the applicant informing the person of your decision (defaulted to **Yes**).
- 2. a **Delay email by** dropdown (required to choose no delay or delay by XXX days)
- 3. an Interviewed, Not Hired Reason dropdown (required)

Interviewed, Not Hired reason		
Please indicate the reason for selecting the int	terviewed, not hired status:*	
Select	~	

The choices in the dropdown are:

- Accepted another offer
- Personal reasons
- Company benefits unsatisfactory
- Compensation unsatisfactory
- Unable to relocate
- Staying with current employer
- Does not meet position requirements
- Other candidates more suitable
- Does not fit job requirements
- Background / Reference check requirements not met
- Position filled
- Other
- 4. an area for a **Note**
- 5. an option at the bottom to **Move Now** (blue button) or **Cancel.**

<u>Select Other</u> – This option can be chosen when the other options do not apply.

1. Choosing **Select Other** opens a screen that contains other options.

ange application status	
Incomplete	
Submitted	
New	
Does Not Meet Requirements	
Under Review by Search Committee	
Review Unsuccessful	
Recommend for Interview	
Interviewed, Not Hired	
Hiring Proposal (Launch Offer Card to Finalize)	
Background Check - Requested	
Background Check - Pending	
Background Check - Completed	
Background Check - Unsuccessful	
Offer Letter Sent	
Offer Accepted	
Offer Declined	
New Hire Form Complete	
Position Filled	
Position Cancelled	

2. Make a selection and then click on **Save** or the **Next** button at the bottom of the screen (cancel is also an option).



- 3. A **Confirm Status Change** screen will appear. Follow the required prompts to confirm the change.
- 4. Click the **Move Now** button.

Progress Statuses to choose from:

<u>Recommend for Interview</u> – This status will progress the applicant forward in the process.

- 1. A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (defaulted to No).
- 2. At the bottom, click Move Now (blue button) or Cancel.

<u>Hiring Proposal (Launch Offer Card to Finalize)</u> – This status is selected to present an offer to the selected candidate(s).

- 1. A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (defaulted to No).
- 2. At the bottom, click **Move Now** (blue button) or **Cancel.**

Select Other – This option can be chosen when the other options do not apply.

1. Choosing **Select Other** opens a screen that contains other options.

nange application status		
Incomplete		
Submitted		
New		
Does Not Meet Requirements		
Under Review by Search Committee		
Review Unsuccessful		
Recommend for Interview		
Interviewed, Not Hired		
Hiring Proposal (Launch Offer Card to Finalize)		
Background Check - Requested		
Background Check - Pending		
Background Check - Completed		
Background Check - Unsuccessful		
Offer Letter Sent		
Offer Accepted		
Offer Declined		
New Hire Form Complete		
Position Filled		

2. Make a selection from the dropdown list and then click on **Save** or the **Next** button at the bottom of the screen (cancel is also an option).



- 3. A **Confirm Status Change** screen will appear. Follow the required prompts to confirm the change.
- 4. Click the **Move Now** button.

Manage Applicants - Bulk Actions

Hiring Managers and Department Admins can manage applicants by taking **Bulk Actions** using two different methods:

a) Selecting Manage Applications on the Side Menu and then selecting a bulk action from the choices.

New applicant	Select a bulk action	<u>-</u>					
6 Admissio	Bulk apply Bulk assign Bulk compile and send	T (49225:	2)				
Search Res	Bulk move						
📴 All 💌 Sub	Bulk move and send Bulk reference check	ref Name	First name	Last name	Ranking	Phone	Mobile
🛛 🗌 Mar 14	Bulk send Bulk task/reminder	lle	• Elle	Woods			555.555.5
🛛 🗌 Mar 14		erry	John	Smith			3368675

b) Selecting multiple applicants on the Applicant Progress Board and then selecting a bulk action from the choices.

					Switch to List
Quick filters	Search committee review (🙆 🔿 🔿	Offer accepted (1)	000	Withdrawn (2)	000
Statuses with Applications Shortlisted Applicants	Brett Bolton San Jose San Jose	Brook Staples Brooklyn		Emma Watts	
Current Application Statuses Internal Applications Flags v	Flags S El Form	Form Change status Progress	× 000	Flags	
Application status Select all Unsorted applications (0) Incomplete (0)	Change status Progress v 🗞 🔷			Change status Willie Wonker 	···· ··· ···
Submitted (0) New (0) Screen unsuccessful (0)	Form Résumé	Change status Bulk compile and send		Form Change status	000
Phone screen (0) Phone screen unsuccessful (0)	Change status Progress ~ 🔷 🔇	Bulk apply Bulk assign			~~~
Search committee review (11)	Mary Maples Melbourne	Bulk invite to apply			
Search committee unsuccessful (0) Hiring Manager review (0)	Flags	Bulk move and send Bulk reference check			

Bulk Change Status

- 1. Click on **Manage Applications** on the Side Menu.
- 2. Select the desired number of applications by clicking on the boxes to the left of the applicants. The dropdown above the check boxes aids with the selection of applicants.
| Ξ | Page | eUp.∲ | | | | | | | |
|---|------------|------------|-----------------------|-----------|------------|-----------|---------|-------|--------|
| | New applic | ant Sele | ct a bulk action 🛛 🗸 | | | | | | |
| | Admis | Results | ounselor - TEST | (49225) | 2) | | | | |
| Ī | 🛛 All 💌 | Submitted | Status | Pref Name | First name | Last name | Ranking | Phone | Mobil |
| | | r 14, 2023 | Hiring Proposal (Laun | Elle | Elle | Woods | | | 555.55 |
| | | r 14, 2023 | Under Review by Sear | Terry | John | Smith | | | 33686 |

- 3. Click on **Bulk Move** in the top dropdown list.
- 4. A new screen appears showing the number of applicants you have selected to bulk move. Click on the dropdown arrow beside the **Application Status** field.



- 5. From the dropdown list, select a new status that you wish to move the selected applicants to.
- 6. Click the **Next** button.
- 7. A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (Please make sure the correct decision for communication is marked, whether Yes or No).
- 8. At the bottom, click **Move Now** (blue button) or **Cancel.**

Bulk Compile and Send

This bulk action is helpful to gather any documents from a group of selected applicants and send. The action compiles the selected documents (those that are checked) into one convenient PDF.

- Use either method a) Selecting Manage Applications on the Side Menu, or b) Selecting multiple applicants on the Applicant Progress Board and then select Bulk Compile and Send from the choices.
- 2. A screen appears letting you know the number of applicants you have selected. Check to be sure you have the intended number of applicants selected. If not, click **Cancel** at the bottom of the screen and correct your selections.

3. If you have the correct number of applicants selected, select the documents you would like to include in the created PDF.

≡ Page∪p.	Joh	s People Reports ∨ Recent
Bulk compile		
	Bulk action status: 9 11 Applicants Complete You have selected 11 applicants to compile documents for, please select the documen like to include.	its you would
	Application details	
	Applicant personal details	
	Profile	
	Application form	
	Additional form	
	New hire form	
	Application notes	
	Onboarding Form	
	Completed online reference check form	
	Applicant documents	
	Cover letter	
	Cover Letter - System	
	Other - Applicant	
	Resume	

- 4. Towards the bottom of the screen, you can select "Format for double-sided printing" if you wish.
- 5. Scroll to the bottom of the screen and click the **Create PDF** button.



6. A **Creating document** screen appears to let you know the status of the file. If you are satisfied with the file, click the **Continue** button.

6	6	0
Documents Processed	Warnings	Successful
Complete		
The following items co	uld not be included in the	compiled document. More info
found) Kelsey Carter - Applicatio	n documents: Kelsey Carte	Assoa's Resume Updated 2.doc (Document n r's Resume 2.doc (Document not found) wis Resume.docx (Document not found)
found) Kelsey Carter - Applicatio Mr Danny Davis - Applica Mr Andrea McCartney (E found) Tyler Miller - Application	n documents: Kelsey Carti tion documents: Danny Di dward) - Application docu documents: Tyler Miller.do	r's Resume 2.doc (Document not found) wis Resume.docx (Document not found) ments: Edward W. Forrest.docx (Document no
found) Kelsey Carter - Applicatio Mr Danny Davis - Applica Mr Andrea McCartney (E found) Tyler Miller - Application	n documents: Kelsey Carti tion documents: Danny Di dward) - Application docu documents: Tyler Miller.do	rr's Resume 2.doc (Document not found) wis Resume.docx (Document not found) ments: Edward W. Forrest.docx (Document no cx (Document not found)
found) Kelsey Carter - Applicatio Mr Danny Davis - Applica Mr Andrea McCartney (E found) Tyler Miller - Application	n documents: Kelsey Carti tion documents: Danny Di dward) - Application docu documents: Tyler Miller.do	rr's Resume 2.doc (Document not found) wis Resume.docx (Document not found) ments: Edward W. Forrest.docx (Document no cx (Document not found)

7. A new screen appears with the ability to email the PDF to the system users and others you select. The screen also provides instructions on how to download and save the document. ("To download the document, right click on the link below and select 'Save Target As'. Note: To send the document it is not necessary to download the document below. The document will be sent as an attachment with the communication below.')

- 8. You can select 'Yes' or 'No' to Send Document.
- 9. If you choose to send an email, click the **Okay** button once you have configured your email.

Bulk Move and Send

This bulk action is helpful to **MOVE** a group of selected applicants to a different application status and **SEND** notice of the action to users that you select.

- Use either method a) Selecting Manage Applications on the Side Menu, or b) Selecting multiple applicants on the Applicant Progress Board and then select Bulk Move and Send from the choices.
- 2. A pop-up screen appears for sending an email. Check to be sure it is being sent to the correct users. You must choose at least one user to send the email to.

ommunicatio	n template:	No temp	late				~		
E-mail									
User:				Q A					
	No user se	lacted		~ <i>D</i>					
	NO USER SE	lected.							
Add more u	sers								
User									Remove all
Human Reso	urces:								
Cory Potter									Remove
Jamie Canada	i								Remove
Sarah Davis									Remove
Other e-mail:									
Recipient mer	ge fields will	not merge for	r e-mail add	resses e	ntered i	into this	field.		
From:*		recruitment@							
riom:"	compand	recruitment@	elon.edu						
Subject:*	Bulk mov	e and send ap	plication						
Body:*									Merge fields
BI⊻	S ≣ .		Formats -	A -	Α -	8 🏾	- 1	0	(?)
				_	_	-			Ú

- 3. Scroll to the bottom and click the **Next** button.
- 4. On the next screen, click on the dropdown arrow beside the Application Status field.

Bulk action status:	👕 2 Applicants 🔷 Complete
ou have requested	to move 2 applicants.
elect a status to mo	ove these applicants to:
pplication status:	Select
	Select 🔺
	Incomplete
	Submitted
	New
	Does Not Meet Requirements
	Under Review by Search Committee Review Unsuccessful
	Recommend for Interview
	Interviewed, Not Hired
	Hiring Proposal (Launch Offer Card to Finalize)
	Background Check - Requested
	Background Check - Pending
	Background Check - Completed
	Background Check - Unsuccessful
	Offer Letter Sent
	Offer Accepted
	Offer Declined
	New Hire Form Complete
	Position Filled Position Cancelled

5. From the dropdown list, select a new status that you wish to move the selected applicants to. Then click the **Next** button.

Bulk action status: You have requested	3 Applicants Complete to move 3 applicants.	
Select a status to mo	ove these applicants to:	
Application status:	Interviewed, Not Hired	~
	Next >	Cancel

6. A new screen appears to give you the opportunity to notify the applicants of your decision. Check over the details of the email.

You ha	ave re	1.00	l to mo	ove 3 ap	plicants	nplete to the state se people::	us "Inte	erviewe	d, No	ot Hired	I".				
Comm	iunica	ation tem	plate:	No	template	e				~					
E-mai	il: App	olicants:	• Yes	O No											
Fro	m:*	com	pandre	cruitme	nt@elon	.edu									
Suk	oject:*														
Jun	ject.	* Your	Applic	ation Sta	atus with	n Elon Univer	rsity								
	ssage		Applic	ation Sta	atus with	n Elon Univer	rsity						Merge	fields	
	ssage	2:				Formats -	,	A -	P		<u>I</u> ×	0	Merge	fields	

7. Scroll to the bottom of the screen and select a reason for the action using the dropdown arrow. This is a required field.

Interviewed, Not Hired reason	
Please indicate the reason for selecting the int	erviewed, not hired status:*
Select	
Select Accepted another offer Not aligned with career goals Personal reasons Company benefits unsatisfactory Remuneration unsatisfactory Roster unsatisfactory Travel requirements unsatisfactory Unable to relocate Staying with current employer Continuing study Does not meet requirements Does not meet qualifications Did not fit with company culture Other candidates more suitable Does not fit job requirements Background / Reference check requirements not met Medical / Police check requirements not met Visa requirements not met Position filled	
Select	

- 8. You can also attach files, delay the email, or add notes on this screen.
- 9. Once you've completed all necessary fields, scroll to the bottom, click **Move Now** (blue button) or **Cancel.**

Offers

Create the Hiring Proposal

The Hiring Proposal will automatically trigger once the selected candidate is moved into the "Hiring Proposal (Launch Offer Card)" status.

- 1.) Move the selected candidate using the drag feature (hold left mouse button down while hovering over an applicant's card) and drop the applicant from the current column to the **Hiring Proposal (Launch Offer Card)** column.
 - or
- 2.) Move the selected candidate by using the dropdown feature on the applicant card.

Under Review by Search Co 🚫 🚫	Hiring Proposal (Launch Of 🚫 🚫
John Smith Chicago	Elle Woods Washington, DC
Flags	Form Résumé
Form Résumé	Change status Progress
Unsuccessful v Progress v 🔿 🔿	

- 3.) A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (defaulted to No).
- 4.) At the bottom, click Move Now (blue button) to fully transition the applicant into the "Hiring Proposal (Launch Offer Card to Finalize)" status. This status change is defaulted so that no communications are sent to the applicant. If you wish to notify additional systems users of the status change, you can do so in this step.

From status: Under Review by Search Committee To status: Hiring Proposal (Launch Offer Card to Finalize)
Io status: Hinng eroposal (Launch Umer Carlo to Hinaice) Communication template - No template - V
E-mail: Applicant: Yes: O No
No SMS will be sent to the applicant as they do not wish to receive them. Additional users from Job: Yes: No
= Note
The following will be added to the applicant notes for administrators to view:
4
Update job status from Review to Pre-Offer: O Yes • No

5.) The Hiring Proposal form will automatically appear with many details pre-filled using the selected applicant's profile information and associated job information.

Hiring proposal details	;					
	Ms Elle Woo	ods (Elle)				
	Personal detail	ils				
	Address:	123 Cherry Blossom Dr Washington, DC, District of Columbi 20053, United States	Pho a Cell		.555.5555	
	E-mail:	elonhrcrtest@gmail.com				
	Applicant numbe	er: 1047	Pror	nouns: She	/her/hers	
	View profile					
	Current or pre	evious employee details				
	select their empl	t you are extending an offer to is a curr oyee profile. If the applicant is not a cu ease leave the field blank.				
	Employee number:					
	Employee:	C	2 /			
		No user selected.				
	Job details					
	-					
	Position Title: Employment	 Admissions Counselor - TEST. 				
	type:	Staff Full-Time				
	Division:	Admissions and Financial Aid				
	Department:	Admissions				
	 Hiring proposi 	al details				
	Approval	Pending				

6.) Complete the applicable fields with the requested information. Please note, staff positions are not required to provide any information requested under the "Faculty Only" section.

Important Note: Please use the appropriate salary field within the hiring proposal based on if the position is paid an annual salary or an hourly rate. This step is crucial so that the correct salary amount is provided in the Offer Letter.

	SALARY
Annual Salary:	
Hourly Pay Rate (if not Annual Salary):	
Salary Notes:	
	h

7.) If a Background Check (screening) or Motor Vehicle Screening (motor vehicle report) is required, please indicate this request under the **PRE-EMPLOYMENT CHECKS** section of the Hiring Proposal. Please see the Background Check section for additional information regarding Background Check processing.



8.) All new employees will need to complete a New Hire Form. Please use the dropdown option to indicate "New Hire Form" under the Onboarding section. Based on the type of position and the selected candidate, please indicate which onboarding workflow will be appropriate for the new hire.

	ONBOARDING	
Onboarding Form:*	New Hire Form	~
Onboarding Workflow:*	New Employee	~
Reports to manager:*	Cory Potter Q 🥖	
	Email address: cpotter9@elon.edu	
Onboarding Delegate:	Cory Potter Q 🥒	
_	Email address: cpotter9@elon.edu	

New Employee – select this workflow if the candidate is a new external hire into a permanent position that will require access to all new employee materials, such as benefits enrollment forms

No Onboarding – select this workflow if the candidate is a current employee and internal hire

Temporary Employee – select this workflow if hiring a temporary position

- 9.) The **Offer Progress** section will be automatically updated based on the acceptance/rejection of the offer letter by the new employee. Please <u>DO NOT</u> attempt to edit this section.
- 10.) Once the hiring proposal information has been completed and saved, create a draft offer letter by using the established template provided. Click the **Merge Document** button and a new window will open to select the appropriate letter template. (If you are unsure of the correct template, you can view the available options in this window.)

Add document - Me	erge document 🛛 🛛					
Document	Date	Size	Category			
Document library:						
Name	1			Date	Si	ze
🗅 Offer Letters (2)						
Accument marge						
ocument merge						
	s MUST be one of the following file type on = .rtf or .RTF)	151	_		_	
 Note: Merge template document Rich Text Format (File extensi 		151		_		_
 Note: Merge template document Rich Text Format (File extensi 	on = .rtf or .RTF)	51				-
 Note: Merge template document Rich Text Format (File extensi Microsoft Word 2010 or newe 	on = .rtf or .RTF)	5				
Note: Merge template document Rich Text Format (File extensi Microsoft Word 2010 or new Select documents to merge: Documents	on = .rtf or .RTF)	151				
Note: Merge template document Rich Text Format (File extensi Microsoft Word 2010 or new Select documents to merge: Documents Ofter Letters	on = .rtf or .RTF) r (File extension = .docx or .DOCX)	151		Eeb 6 2013	57Vb	View
Note: Merge template document Rich Text Format (File extensi Microsoft Word 2010 or new Select documents to merge: Documents	on = .rtf or .RTF) r (File extension = .docx or .DOCX)	51		Feb 6, 2023 Feb 6, 2023		View

11.) Under the **Approval Progress** section, select the appropriate approval workflow for the hiring proposal and select **Save**.

Background Check Process

Once the approval process for the Hiring Proposal has been completed and all approvals have been received, the Hiring Manager will receive a system notification. Upon receiving approval, please submit the new employee for a background check by performing the following:

- Using the Applicant Progress Board, move the selected candidate from the Hiring Proposal (Launch Offer Card) status to the Background Check – Requested status.
- 2) A new window will appear asking to indicate the type of check being requested (background only OR background with MVR). Please use the dropdown to select the option that meets the needs of the position.

Confirm status change
You are about to move Elle Woods to a different status:
From status: Hiring Proposal (Launch Offer Card to Finalize) To status: Background Check - Requested
Communication template: No template 🗸
Background checks
Background check:* Standard Test Package + Empl 🖌
E-mail: Applicant: • Yes O No

NOTE: This application status is configured to automatically trigger a communication to the selected candidate from our background check vendor, HireRight. In order to ensure the request is successfully routed, DO NOT change the default communication settings (the **E-mail Applicant** option should be marked "No").

Hiring Managers can check the status of the background checks at any time by using the Applicant Card and looking under the **History** tab.



No additional action is required of the Hiring Manager.

- Once a background check has been completed, the application will be transitioned into the Background Check
 Completed status.
- 4.) At this time the HR Recruitment representative will conduct a final review of the Offer Letter and will move the application to the "Offer Letter Sent" status to trigger the release of the Offer Letter into the Applicant portal for acknowledgement. (Only HR should adjust the status to release the Offer Letter following the successful completion of the background check).

Offer Approval Process - Approve or Decline an Offer

- 1. Following all approvals and the successful completion of the background check, the Offer Letter will be sent to the applicant portal of the selected candidate for review and acknowledgement.
- 2. The system will automatically change the application status to **Offer Approved** or **Offer Declined** based on the new employee response to the Offer Letter within their applicant portal.
- 3. Hiring Managers should not attempt to alter this automatic status.

NOTES:

- If a unique situation arises that will require the application status to be manually adjusted, please contact the recruitment representative to assist.
- If this is a salaried position, the employee will still receive a Letter of Agreement outside of the system through AdobeSign.
- Once a new employee acknowledges their offer, they will be asked to complete a New Hire Form. This is considered the final step in the recruitment process.

Close a Search Out

Following the successful hiring of a new employee, it is requested that the following steps be taken to close out a search:

- 1) Ensure that any remaining applicants who may not have previously received a communication are moved into appropriate statuses that will trigger a communication from the system.
- 2) Close the position posting.
 - **a.** Go to **Jobs**, select the **Sourcing** tab, and use the dropdown menu to take action on the job.
 - **b.** Select **Close**.

(492237) Mail Clerk II	TEST	VI	ew applications
Position info Notes Sou	rcing Documents Reports		
Add sourcing channels 🔶 S	vanced options	Surge bar	
Source Website 🛅 🍠	Opening date Feb 23, 2023, 9:00am	Closing date 	Edit Close Link Job preview Bulk update sourcing text

3) You will be asked to confirm that you want to close the position. Click **OK**.

Onboarding

PageUp delivers an outstanding onboarding experience tailored to each new starter's role. This system makes completing payroll forms, learning and other induction tasks easy and in one central location.

Set Up the Initial Onboarding Process

1. Navigate to the ONBOARDING section of the Hiring Proposal Details.

	ONBOARDING	
Onboarding Form:*	New Hire Form	~
Onboarding Workflow:*	New Employee	~
Reports to manager:*	Q /	
Ū.	No user selected	
Onboarding Delegate:	Cory Potter Q 🥒	
0	Email address: cpotter9@elon.edu	

ONBOARDING FORM (*) – For new hires, be sure the **Onboarding Form** is set to 'New Hire Form'.

ONBOARDING WORKFLOW (*) - You have three options to choose from for STAFF onboarding:

- 1. New Staff Member Select this choice if the new hire has not previously been an Elon University employee. It will trigger the comprehensive onboarding workflow for the new employee, the supervising manager, or an onboarding delegate.
- 2. No Onboarding Select this choice if the selected employee does not require onboarding, because the person is currently employed in another role at Elon University and have already completed the required new hire documentation.
- 3. Temporary Employee This choice provides the essential onboarding tasks for temporary employees.

REPORTS TO MANAGER (*) – Type the manager's name into the text box and select the magnifying glass (\mathbf{Q}) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

ONBOARDING DELEGATE – If a Department Admin is going to manage the onboarding process for a new hire, this 'Onboarding Delegate' can be identified. Type the delegate's name into the text box and select the magnifying glass (**Q**) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

2. Be sure to select Save and Close or Save at the bottom of the screen.



Manage the Onboarding Process

Employee Access to Onboarding

NOTE: Before employees can gain access to the **Employee Portal**, they must:

- 1. Log into PageUp by clicking on the **Applicant Login** button at the top right corner of jobs.elon.edu (or through an email sent to their personal email address).
- 2. Review the offer letter.
- 3. Check the box beside "I have read and agreed to the terms of the offer."
- 4. Click the "I accept" button.

Employment	offer				
You must read	and agree to the terms of the	offer before you can acc	ept or decline the of	er.	
Congratulations,	ou have been made an emplo	oyment offer for your Mai	I Clerk II TEST app	ication.	
Please review th	following documents before a	ccepting or declining you	ur offer.		
Once you have a	cepted your offer, it can be re	trieved again from within	the "view applicatio	n" link of the job.	
Offer Letter_Yove	<u>tie Johnson</u>				
By clicking "I acc	pt", I confirm:				
🗆 l have read ar	agreed to the terms of the of	fer.			

Once the new employee accepts the offer, the person can log into the **Employee Portal**.

	ELON				
	Welcome Joe	thome	Update profile	Update resumé	Account
$\overline{\mathbf{V}}$	Congratulations and welcome to our University. You can now access Go to employee portal	the Onboarding po	rtal for important info	mation relating to you	ur new position.
\mathbf{v}	Just so we can get to know you better, we'd like for you to tell us mo	re about yourself.			
	So that we can understand where you'd really make a difference, ev provide us your resume.	ery little bit of inform	nation you add counts	I And of course – you	u can always

Within the Employee Portal, the new employee will see the assigned onboarding tasks categorized as:

- 1. Prior to First Day
- 2. First Day
- 3. First Week
- 4. First 30 Days

Hiring Manager / Onboarding Delegate Access Onboarding Tasks

There are multiple ways to access new hire onboarding tasks:

- 1. From the Side Menu, select My New Hires or My New Hire Tasks (under Workflows section).
- 2. New hire tasks can also be viewed from the **Offers** tile by clicking on **New Hire Tasks** or **New Hires (**and then **View All Tasks)**.

Search	sition descriptions and create	New job	1 Approved
Applicant search			
Manage position descriptions			
New job			E
Jobs open		8-	
Approvals	Advertisements	Applicant Progress Board	Applications
Advertisements			
Search committee review	1 Advertisements	A holistic view of the applications for each	1 Jobs have applicants for review
Applications		active job you are recruiting for	O Applicants assigned to you for review
Assigned applications		Review applications	
My new hires			
My new hire tasks			
Jobs			
JODS Manage jobs			
Manage position descriptions	• * •		
munuge position descriptions			
Applicants	h committee review	Offers	
New applicant		oners	
Manage applications	s requiring panel review	0 Offers awaiting your approval	
Manage reference check requ		2 New hires	
		()	
		O New hire tasks	
Enhanced Reporting			

My New Hires Navigation

NOTE: My New Hires and My New Hire Tasks provide different navigation experiences. This section describes what is seen when **My New Hires** is selected from the Side Menu or **New Hires** is selected from the Offers tile.

Click on **View All Tasks** on the right side of the screen for a given new hire to show a list view of the tasks, who they were assigned to, the due date, and the status

My new hires								
First name:	Last name:	Requisit	ion Number: Ti	itle:	Application status:	Business unit:		Clear Search
						Select	~	
Department:								
Department: No Business unit select	ted 💙							
	Applicant last name	Requisition Number	Title	Application sta	atus	Date started		
No Business unit select		Requisition Number 492244	Title Vice President of Data Intell		atus al (Launch Offer Card to Finalize)	Date started Feb 20, 2023	View hiring propos	al details 1 View all ta

ELON UNIVERSITY | Human Resources

Click on the task name to open a pop-up window with the task description.

PageUp.◆								Jobs Peo	ople	Reports ∨	Recent items
	New hire tasks										
	Reid Fleming Position										
	Vice President of Data Intelligence	Task			Assigned to	Due date	Status				
	Start date Feb 20, 2023	Prior to th	he First Da	у							
	Add optional tasks	E-Verify Info	rmation		Reid Fleming	23 Feb 2023	Completed				
	No tasks	Office Furnit	ture		Laura Kappert	15 Feb 2023	Completed				
	My Favorite Tasks 🗸 🗸	Technology	Needs		Laura Kappert	15 Feb 2023	Completed				
		Keys			Laura Kappert	17 Feb 2023	Completed				
		First Day									
		Elon Accoun	nt		Laura Kappert & Reid Fleming	20 Feb 2023	Hiring manag	er completed	and pend	ling employee	e completion
		Welcome En	nail		Harry Hire	20 Feb 2023	Completed				
		First Weel	k								
		Campus Map	p		Reid Fleming		Open				
		Card Access	5		Harry Hire	25 Feb 2023	Completed				
		Phoenix Car	d and F	Pass	Reid Fleming	25 Feb 2023	Overdue				
	Elon Account		₹	F	×						
	Step due: 20 Feb 2023										
					is access to a variety of resources						
	When the account is created account with instructions for a	or a new employee, they ctivating their Elon emai	y will receive I, resetting th	a "Welcome Elon" en eir password, and re							
	Cancel										

My New Hire Tasks Page Navigation

See the corresponding descriptions below for each numbered item.

Ay new hire tasks mployee: Adam Core Ally Clark	Task: 3 Day 1 Confirmation Day 1 Tasks	i	Clear Search	4
Brian Pariser	Default Hours Discuss Goals with Employee Employee Default Annual Content of			
ielest 🕞 Title 🚺	Employee 🔺 BadgelD	Step due	Hiring manager	Job
Security	Adam Cole	Nov 22, 2021	Darlene Director	Stenographer
Pre-Day 1 Tasks	Adam Cole	Nov 26, 2021	Darlene Director	Stenographer
Day 1 Tasks	Adam Cole	Nov 29, 2021, 8:00am	Darlene Director	Stenographer
Training, Policy & Procedures, Intranet Resources	Adam Cole	Dec 3, 2021, 8:00am	Darlene Director	Stenographer
Day 1 Confirmation	Adam Cole	Nov 29, 2021, 10:00am	Darlene Director	Stenographer
Organize coffee	Ally Clark	May 24, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court
9 I9 Form completion	Ally Clark	May 19, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court
Work station set up	Ally Clark	May 19, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court
Discuss Goals with Employee	Ally Clark	May 31, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court
We'd love to hear your feedback	Ally Clark	Jul 7, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court
Employee Performance review	Ally Clark	Sep 23, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court

- 1. Bulk Complete: Ability to check assigned tasks and mark as completed.
- 2. Employee Filter: Ability to filter tasks by the employee.
- 3. **Task Filter**: Ability to filter tasks by the task.
- 4. Filter Search/Clear: Initiate or clear any filters. Note Any filters previously in place will carry over when next visiting this page.
- 5. Task Details: Currently open (uncompleted) tasks that are assigned to the logged in user.
 - a. **Title**: Title of the assigned task
 - b. **Employee**: Name of new hire
 - c. Badge ID: N/A
 - d. Step Due: Onboarding task completion due date
 - e. Hiring Manager: New hire 'reports to' manager
 - f. **Job**: New hire job title
 - g. Start date: New hire start date
 - h. View all tasks: Redirect to view all tasks assigned to a new hire

Assigning Additional Onboarding Tasks

Hiring Managers can assign additional onboarding tasks to members of their team.

- 1. Navigate to the My New Hire Tasks using the side menu.
- 2. Search for the specific employee(s) using the search function.

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Bulk Complete						
My new hire tasks						
Employee:	Task:				Clear Search	
Brook Staples	Card Acce	255	A			
Jane Doe	Elon Acco	unt				
Steve Rogers	Employee	Performance review	N			
	🗹 Keys					
	Office Eur	roituro	•			
select 🗨 Title	Employee	BadgeID	Step due	Hiring manager	Job	
	Brook Staples		Mar 24, 2018	Harry Hire	Research	n As:
Organize coffee	brook stapies					

3. Click on **View All Tasks** (blue text) on the right side of the screen beside the new employee.

∃ PageUp. ◆ _{BETA}					Jobs	People	Recent items \vee	Harry 🗸	? ~
Bulk Complete									
My new hire tasks									
Employee:	Task:			Clear Search					
Brook Staples	Card Access								
Jane Doe	Elon Account								
Steve Rogers	Employee Performance revi	ew							
	Keys								
	Coffice Euroliture	*							
Select 🔹 Title	Employee BadgeID	Step due	Hiring manager	Job		Sta	n _{date}		
Organize coffee	Brook Staples	Mar 24, 2018	Harry Hire	Research Assistant - College of Medicine	1	Ma	r.	VI	iew all tasks

4. Click Add Optional Tasks on the left side of the screen.

		Jobs	People Settings Recent	items v Quick se	arch Q
New hire tasks					
Steve Rogers Position Academic Affairs Operations and Resource Manager					Add new tasl
Start date	Task	Assigned to	Due date	Status	
Notify updates	Prior to the First Day				+ Add
Add optional tasks	E-Verify Information	Steve Rogers	23 Feb 2023	Completed	2
No tasks	Office Furniture	Ronald Recruiter	15 Feb 2023	Overdue	Ĺ
My Favorite Tasks 🗸 🗸	Technology Needs	Ronald Recruiter	15 Feb 2023	Overdue	Ĺ

- 5. A **New Task** pop-up window will appear.
- 6. Add a required Title to the new onboarding task (e.g., FERPA Training).

New task	×
Title*	A

7. Select the required **Group** from the dropdown list depending on when you wish for the new employee to complete the task: Prior to the First Day, First Day, First Week, or First 30 Days.

New task	×
Title*	<u>^</u>
Group*	
Select	0
Select	
Prior to the First Day	
First Day	
First Week	•
First 30 Days	

- 8. If known, enter a **Due Date** and a **Due Time**.
- 9. Enter the task **Description** in the text box. You can click on the three dots (ellipsis) to expand the toolbar.



- 10. To be consistent with the pre-loaded onboarding tasks, you can add title within the task description textbox using Heading 5.
 - a. First, type the title in the text box.
 - b. Highlight the title.
 - c. Go to Formats >> Headings >> Heading 5



11. You have the option to hyperlink text in the task.



12. Next, you assign the task to both the manager and employee, the manager, or the employee by clicking on the appropriate radio button. **"Task allocated to**" is a required field.

Task alloc	ated to*	
O Both	O Manager	C Employee

13. (Optional) If you will be using the onboarding task on a regular basis, check the box next to Add to favorites.



14. Once all the required field are completed, the **Create** pill button changes from gray to blue. Click **Create**.

Task allocated to*	
Additional task owner	
Search	
Add to favorites	
Cancel	Create

15. Clicking the Create button closes the window. The new task now appears on the **New Hire Tasks** screen in the **Group** that you assigned it to. Notice that the added onboarding task has icons for editing and deleting the task on the right side of the screen.

1	Example Task	Ronald Recruiter	Open	Z	1	

Complete and Close Assigned Tasks

1. Click on the title of the applicable task.

Bulk Complete			
My new hire tasks			
Employee:	Task:		
Patricia Mattie	Uwatch Training Video	S	
(select 🖵 Title			

2. The task pop-up box will appear. Complete the task as directed. Click **Mark as completed**.

Hellol Please watch the recommended training videos.	
Mark as completed	Close