ELON
UNIVERSITY

PageUp

Reference Guide

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.

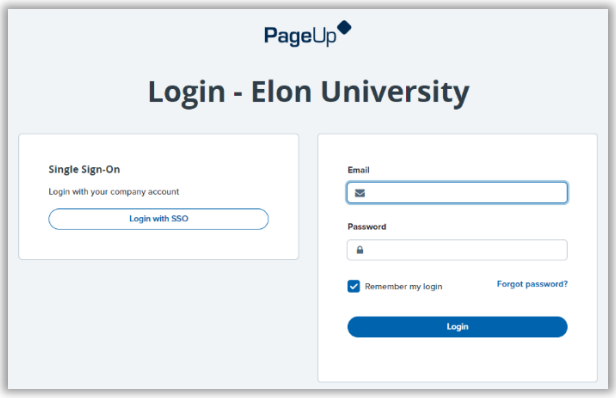
Other user types will be covered in the General Guidelines for Using PageUp section.

General Navigation

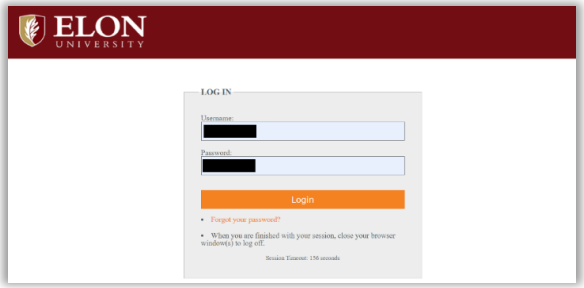
To access the PageUp system, go to http://www.elon.edu/u/fa/hr/pageup-talent-management-system/ and click on the PageUp Login button and log in with your Elon credentials.

PageUp Home Screen / Employee Login

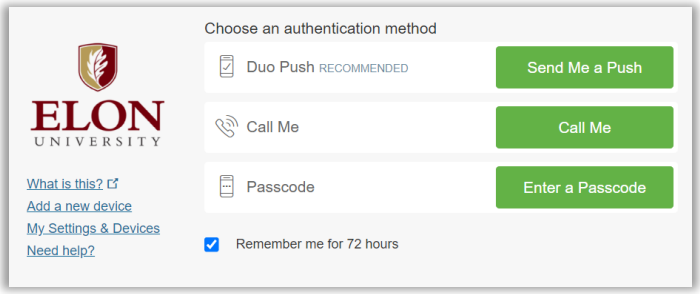
The PageUp Login button on the Human Resource webpage takes you to a login screen.



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



Next, choose an authentication method using Duo Security.

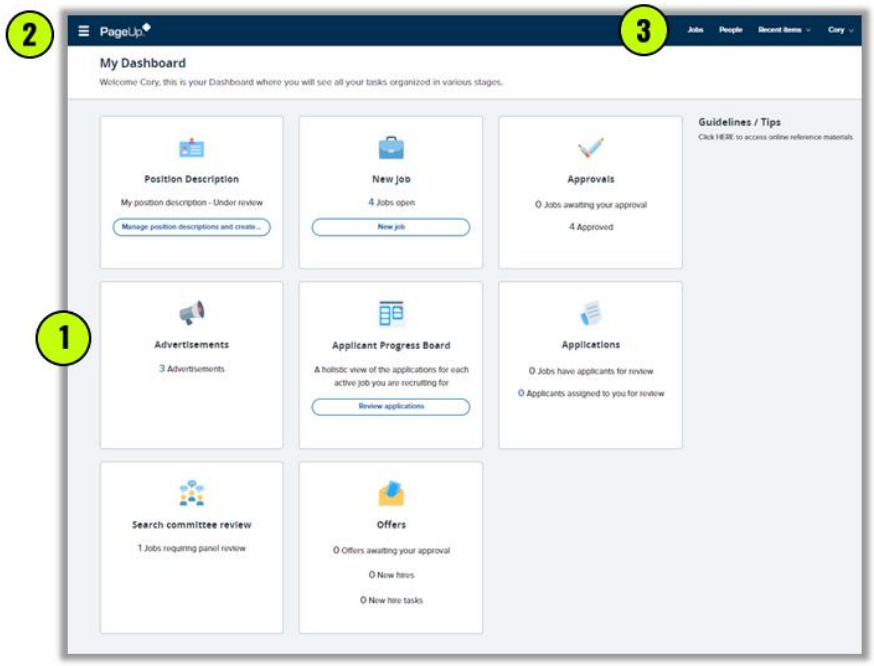


PageUp System Navigation

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)

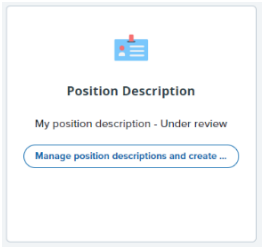


1. My Dashboard

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

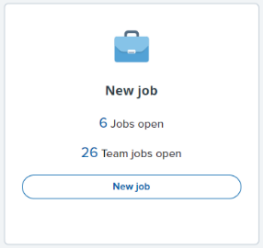
- The dashboard shows pending actions and provides access to system processes on the tiles. The tile layout on the dashboard displays in order of the steps in the workflow process based on the functionality of the user. You can only see the tiles that you have access to, based on the permissions associated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



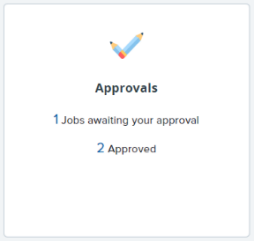
POSITION DESCRIPTION

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



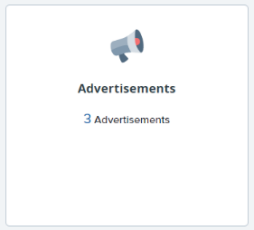
NEW JOB

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



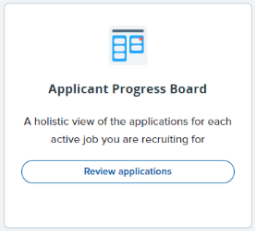
APPROVALS

View and approve position descriptions and position requisitions.



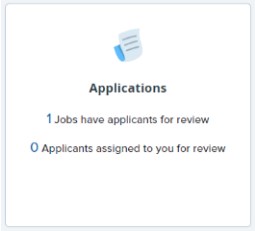
ADVERTISEMENTS

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



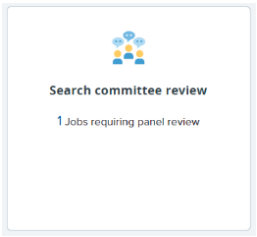
APPLICANT PROGRESS BOARD

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.



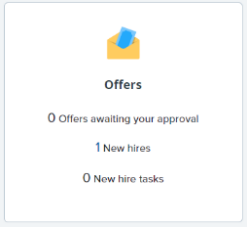
APPLICATIONS

Review applicants.



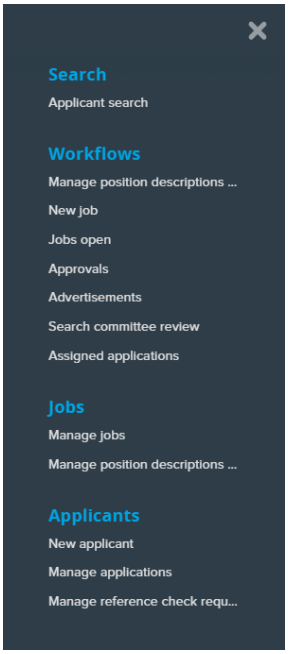
SEARCH COMMITTEE REVIEW

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



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.

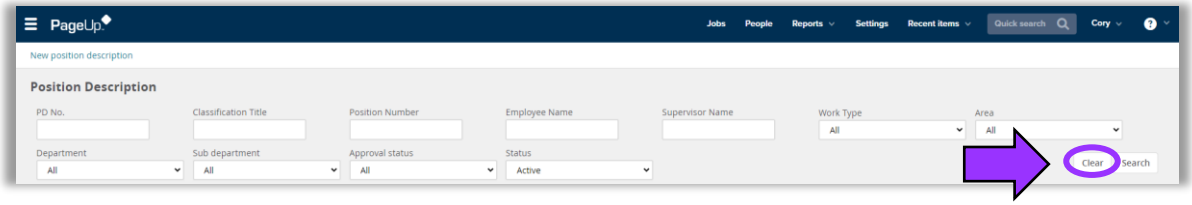
- **Jobs:** Selecting the 'Jobs' quick link will bring you to open jobs that you have access to as an originator, additional reviewer, or supervisor.
- **People:** Selecting the 'People' quick link will take you to the list of applicants for the open job that you most recently accessed. NOTE: To search 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.



- 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 http://www.elon.edu/u/fa/hr/pageup-permission-requests/ 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.

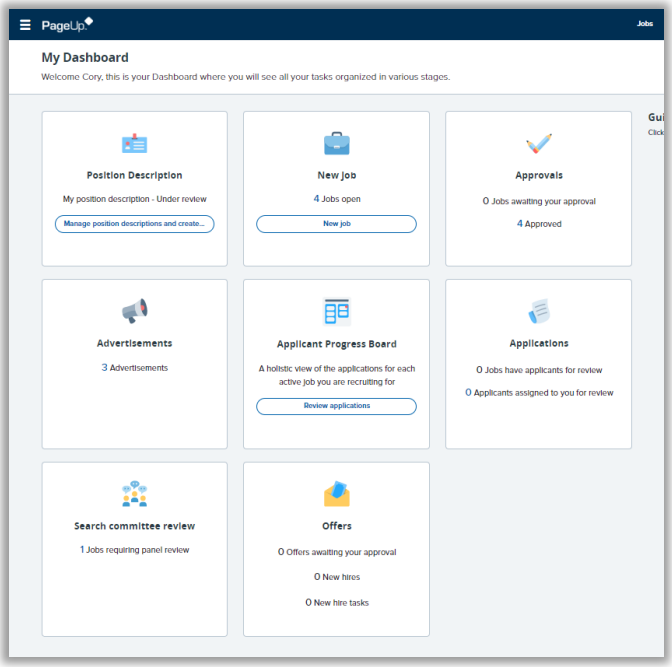
Applicant and Application Flags

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

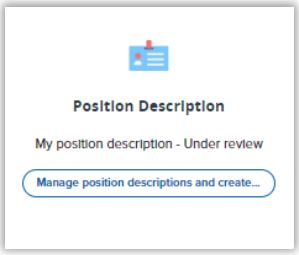
Dashboard

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.



Position Descriptions



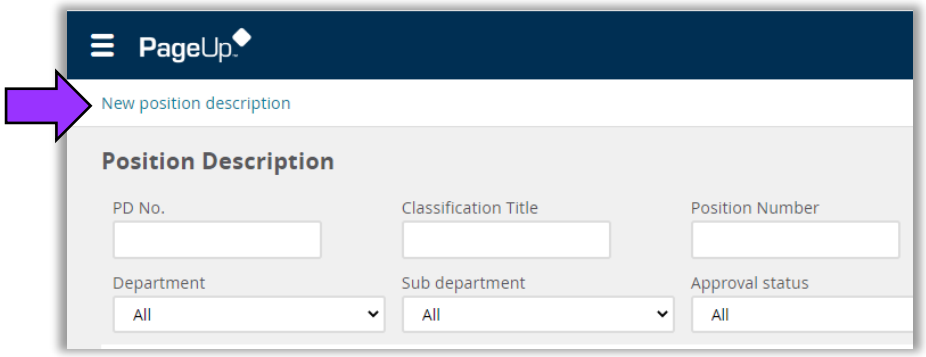
All postings for staff positions must be created from an existing, approved, position description. To access position descriptions, select **"Manage Position Descriptions and create ..."** from Side Menu, or select the **Job Description** title on the Dashboard.

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

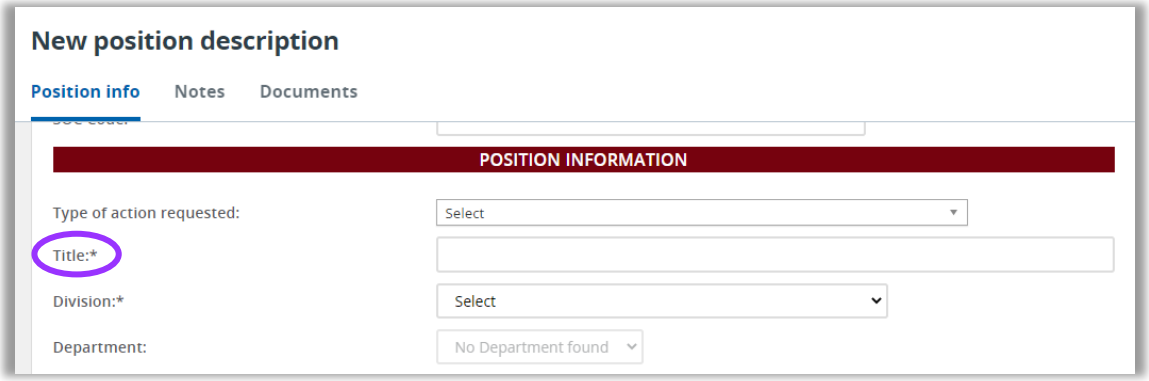
- Create new position descriptions
- View existing position descriptions
- Edit existing position descriptions

Create a New Position Description

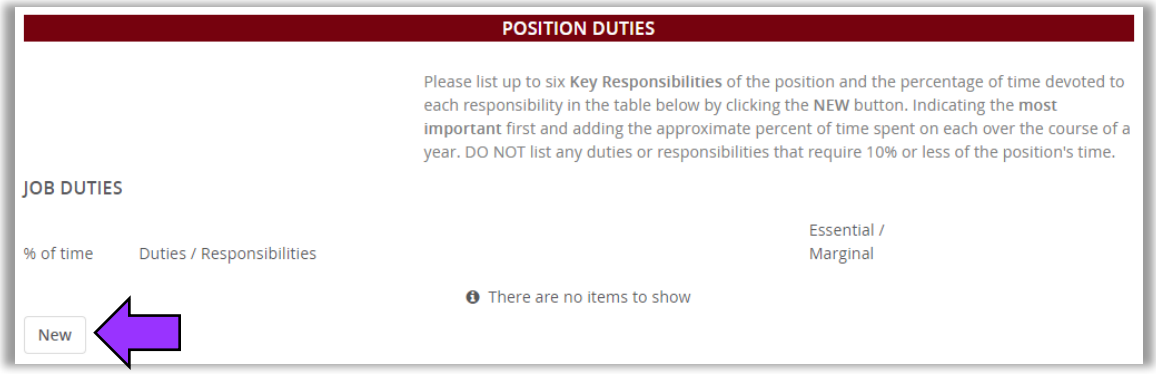
1. Select "New Position Description" at the top left of the Job Descriptions page. This should only be used for a position that does not currently exist within the system.



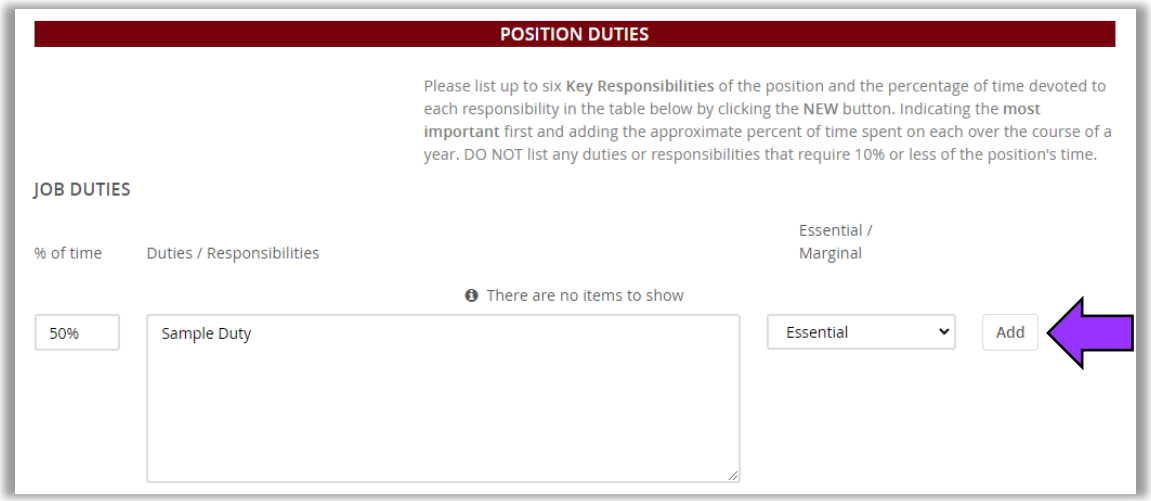
2. Complete the Position Description information. All **required fields** are marked with an **asterisk (*)** and must be completed in order to submit the position description for approval. **Please fill out as many fields as possible when creating a position description.**



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.

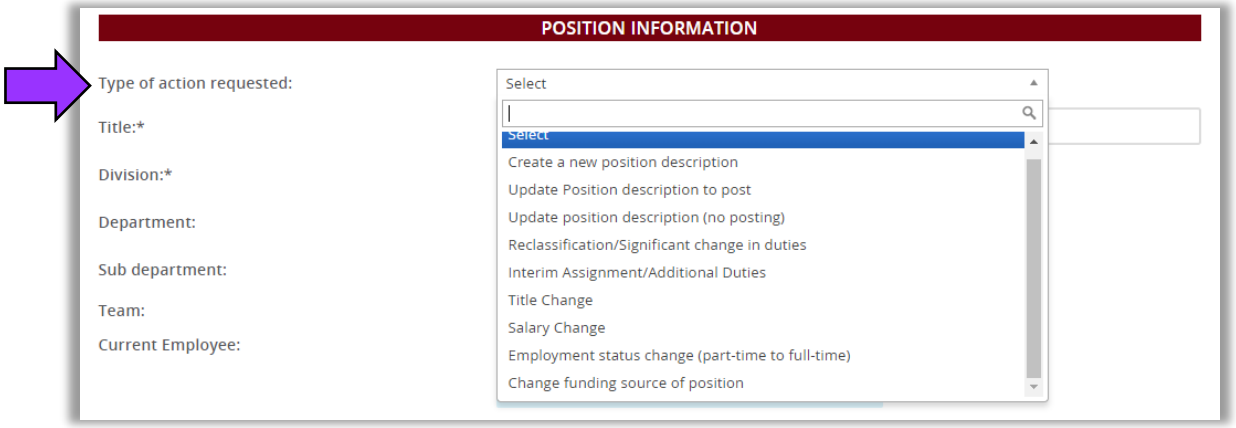


Once you have entered the % of time, the duty / responsibility, and selected whether it is essential or marginal, then click the **Add** button to add the position duty to the position description.



POSITION 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.



- **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.

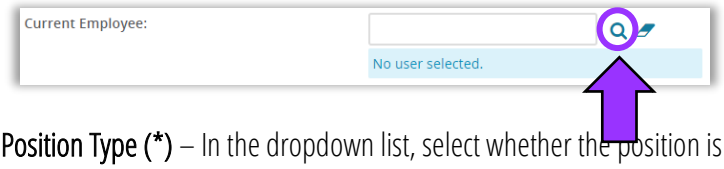
Division (*) – Select the Division this position belongs to in the organization.

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.



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

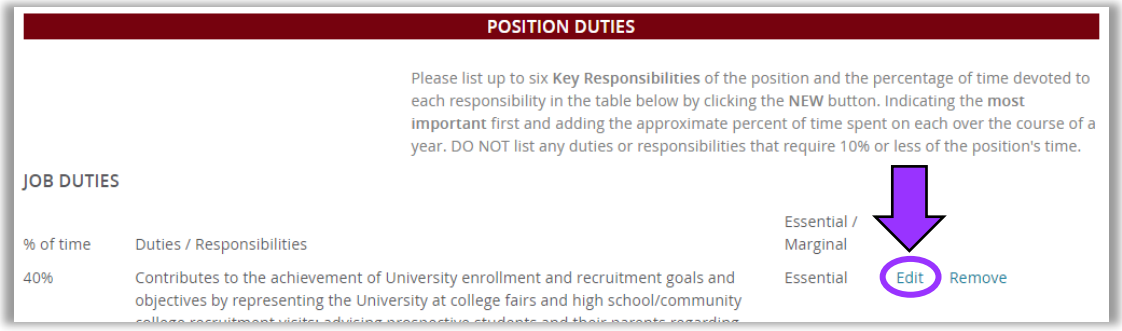
Please describe as clearly and concisely as possible all the information that would be important to fully understand the role and scope of the position. This includes the minimum levels generally necessary to effectively handle the job's essential functions, plus the preferred levels for education and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

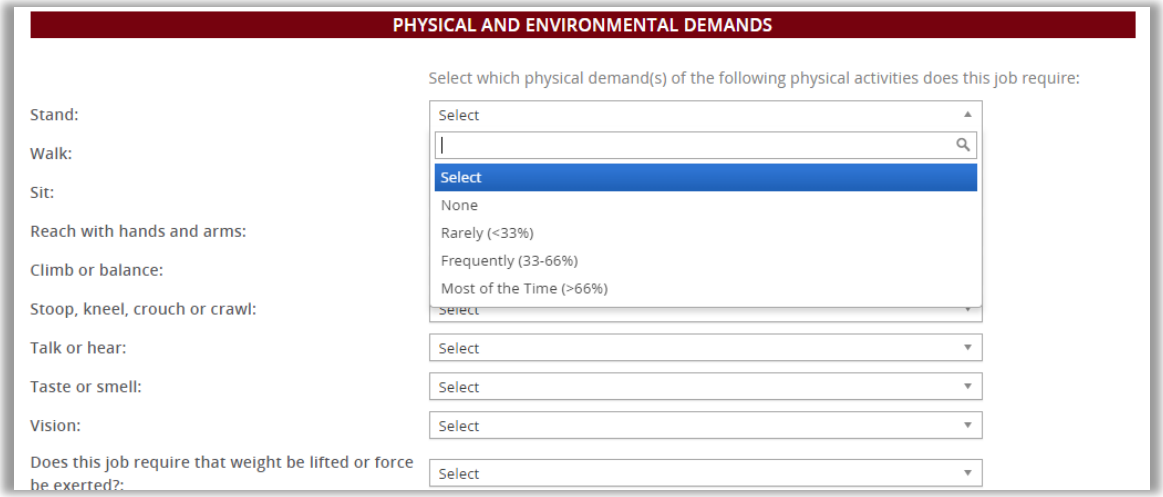
Some Evening and Weekend Work Required – If the answer is yes, describe the details of the evening and weekend work in the text box.

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%).

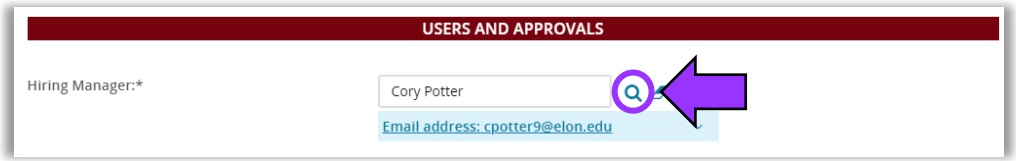


2. After answering the lifting or force pound requirements, please make notes on the specific job duties that require the physical demands selected.

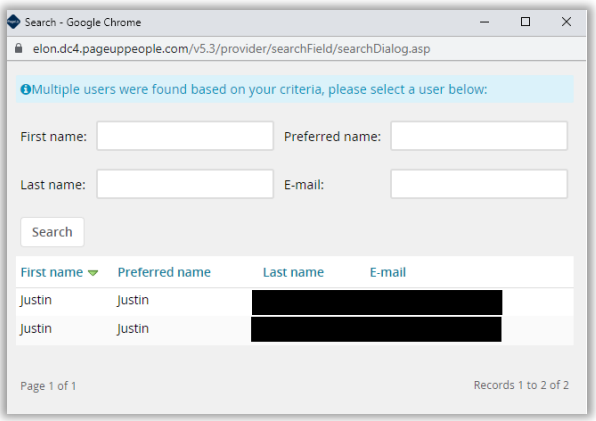
3. Next, answer the questions related to the working conditions with None, Rarely (<33%), Frequently (33-66%), or Most of the Time (>66%).

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.



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.

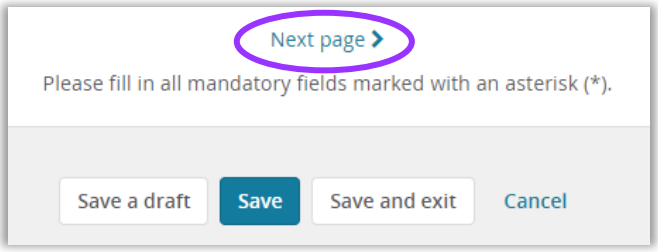


For the **Approval Process** required field, select the appropriate process, such as **Staff Approval**. Using the same search function as described immediately above, type in the appropriate names of the individuals who must approve the new position description.

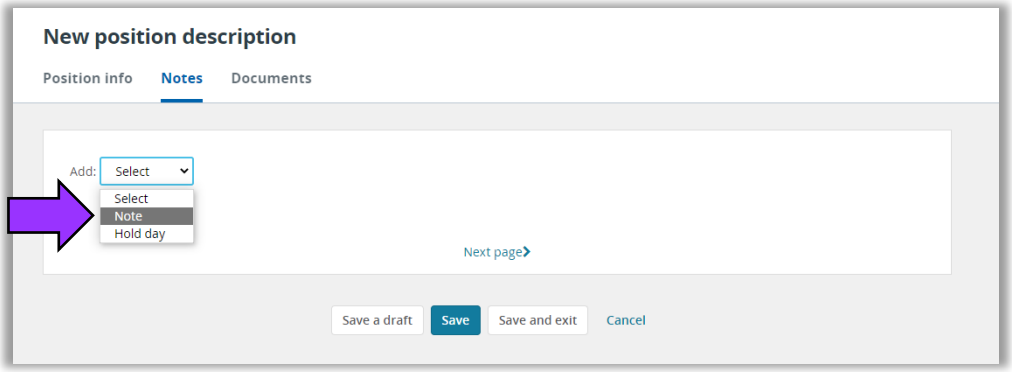
NOTE: Some name fields will default to the designated person for that category of approver. Please do not change the default fields.

Optional Step: Adding Notes to a Position Description

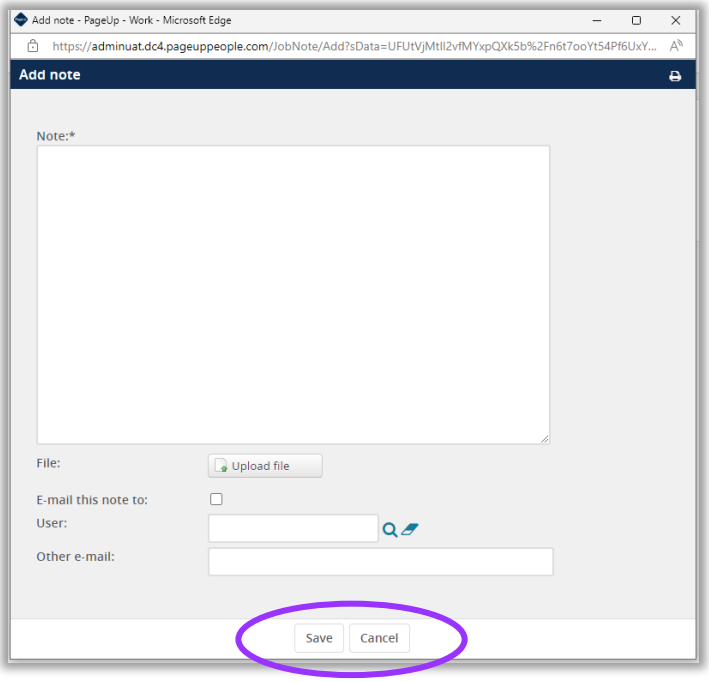
Toward the bottom of the screen (above the **Save** buttons), you can click on **Next page >** (blue text) to get to the **Notes** screen.



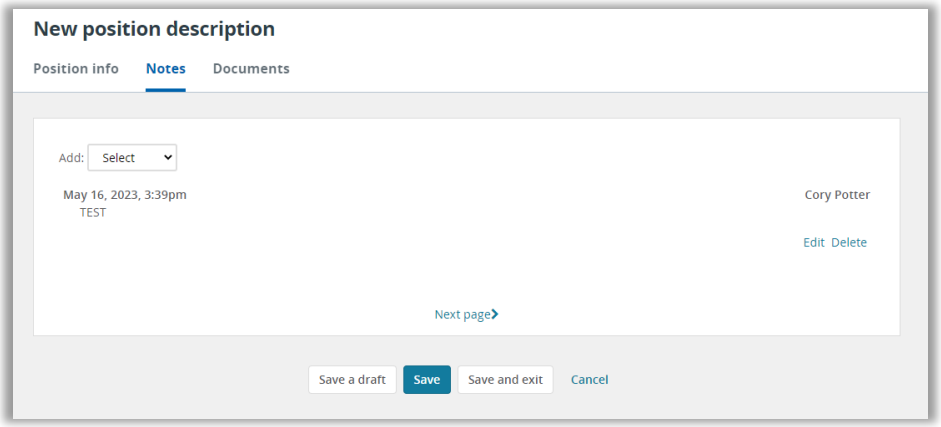
To add a special instructional note to the position description (such a split funding), select **Note** from the dropdown list.



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.

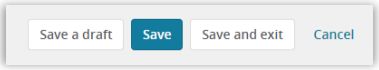


Once you click the **Save** button, you have the options to (a) edit the note, (b) delete the note, (c) add another note, (d) navigate to the **Position Info** tab, or (e) navigate to the **Documents tab** (by clicking on **Next page >** or clicking on **Documents** on the menu.



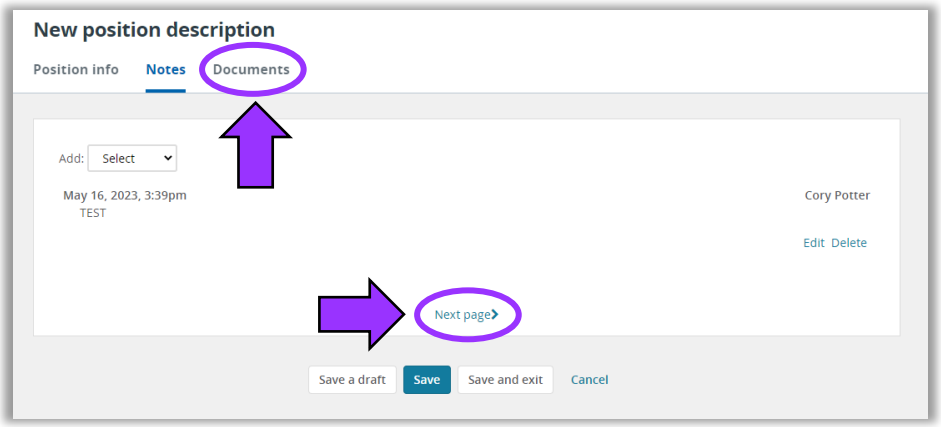
OR

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

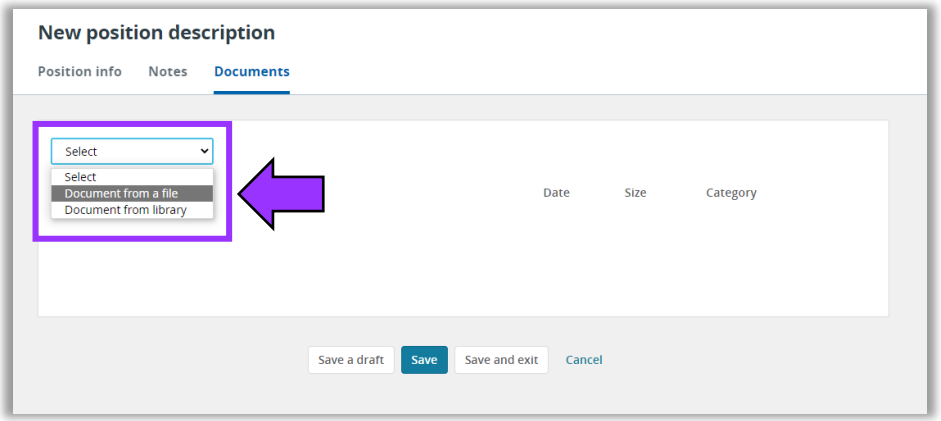


Optional Step: Adding Documents to a Position Description

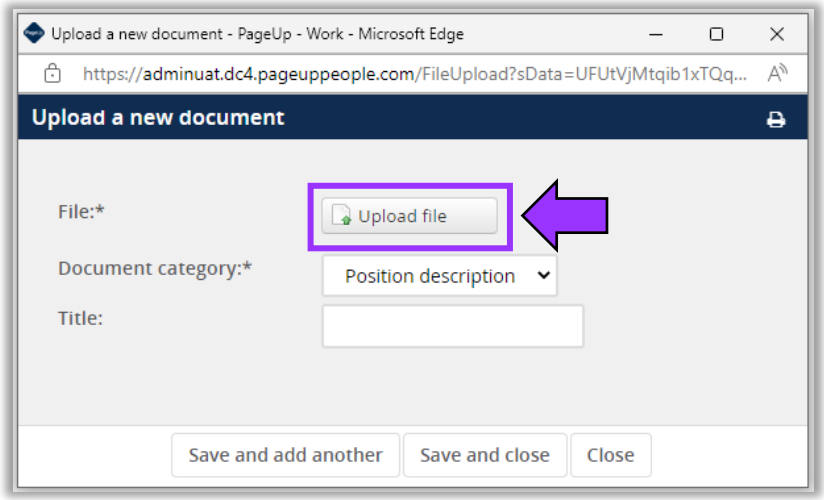
Navigate to the **Documents tab** (by clicking on **Next page >** or clicking on **Documents** on the menu, after adding optional notes (see section above).



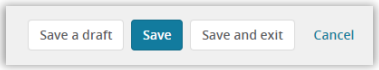
Select **Document from a file** from the dropdown list to add a document (such as an updated organizational chart)



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



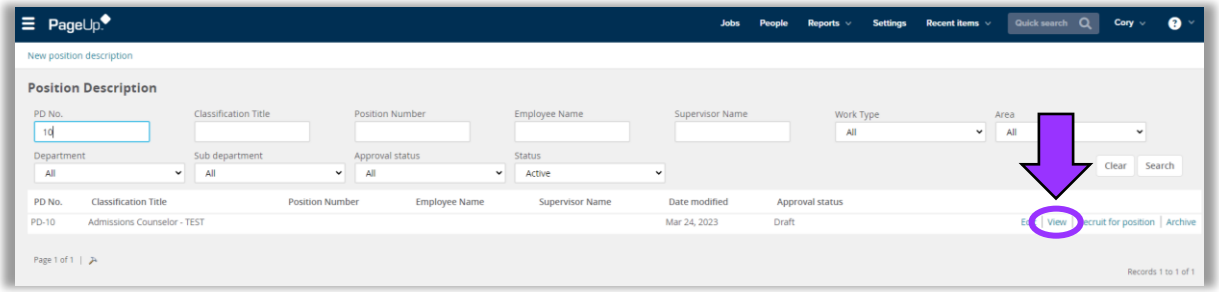
Next, click **Save and add another** to add another document to the position description. Click **Save and close** to save your document and close the pop-up window. Click **Close** to exit the pop-up window without saving the document.
Next, selecting **Save** or **Save and Exit** at the bottom of the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



View a Current Position Description

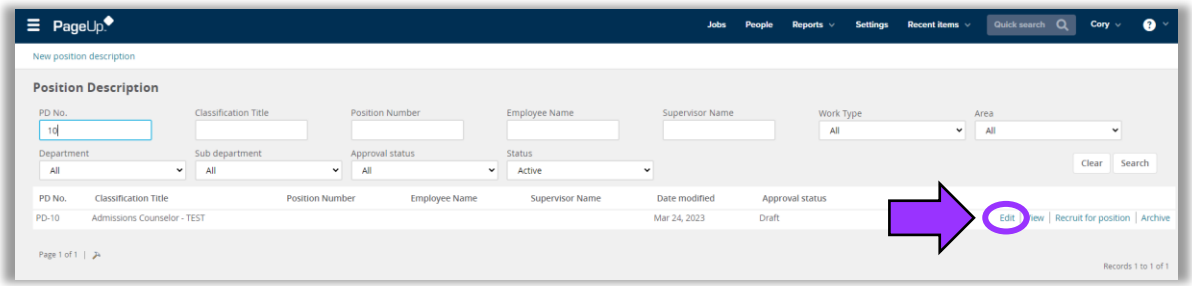
To view the current position description, go to **Jobs** on the Quick Access, or select **Manage Position Descriptions** in the Side Menu or from your **Dashboard**:

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.



Edit a Current Position Description

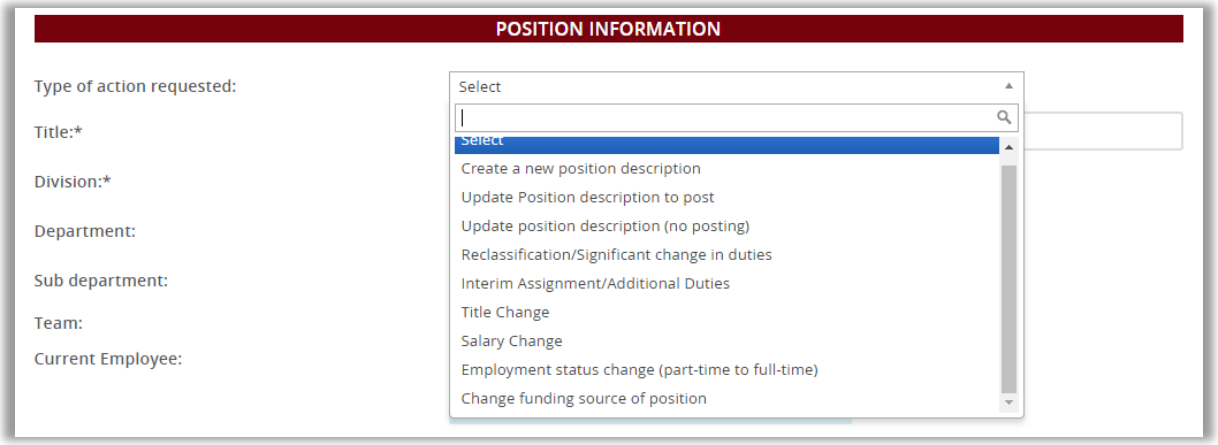
1. To make changes to an existing position description, select **Manage Position Descriptions** in the Side Menu or from the dashboard.
2. Click on the **Edit** (blue text) to the right of the position description you wish to change. You can also view the position description or recruit directly for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



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.



- **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.

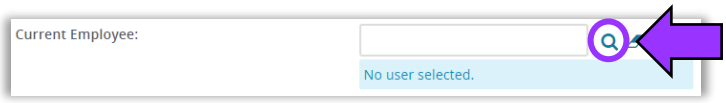
Division (*) – Select the Division this position belongs to in the organization.

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.



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 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.

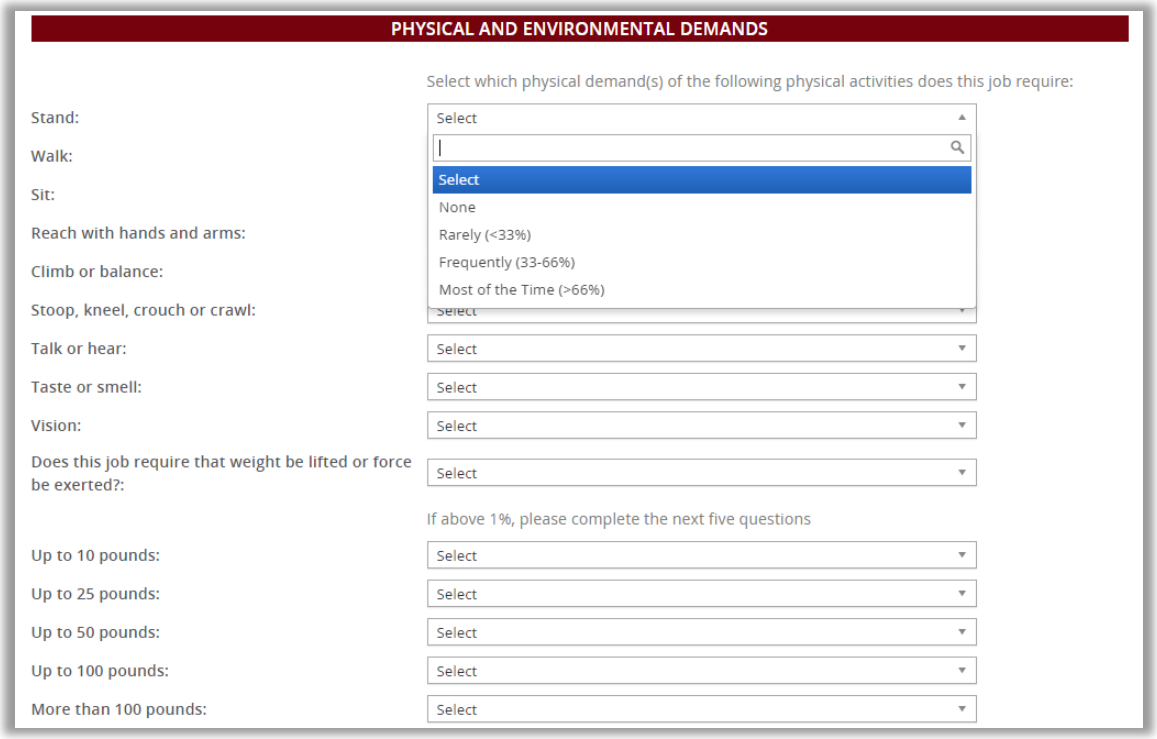
Some Evening and Weekend Work Required – If the answer is yes, describe the details of the evening and weekend work in the text box.

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%).

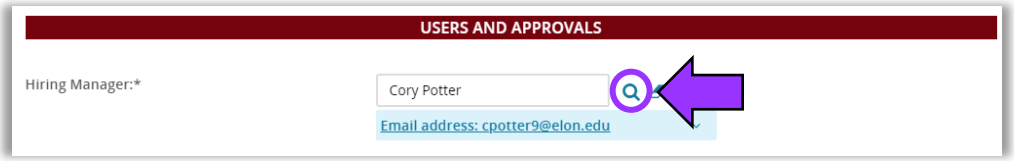


After answering the lifting or force pound requirements, please make notes on the specific job duties that require the physical demands selected.

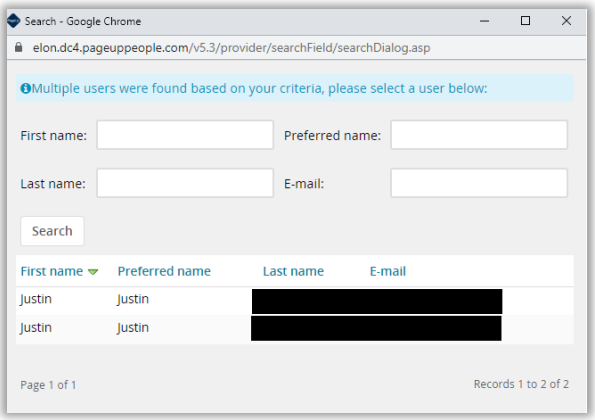
Next, answer the questions related to the working conditions with None, Rarely (<33%), Frequently (33-66%), or Most of the Time (>66%).

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.

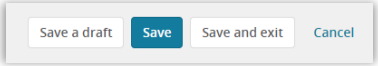


If multiple users have the same name, a search screen will pop up alerting you that multiple users were found based on your criteria, please select a user from the choices.



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.



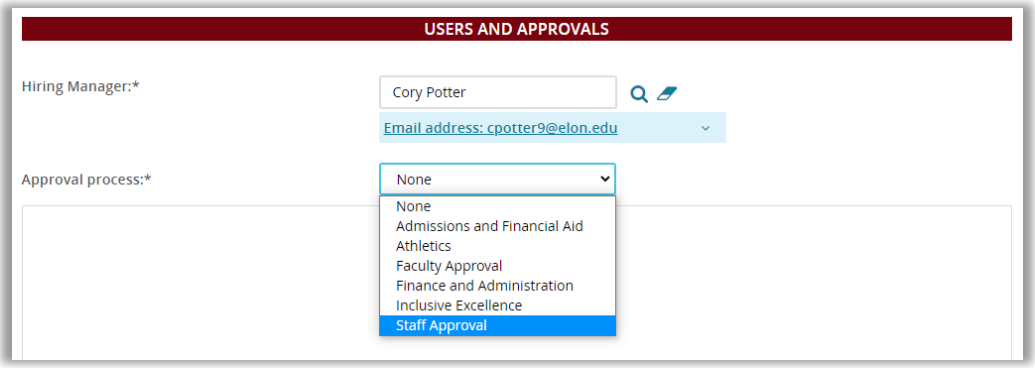
How to Request Action on an Existing Staff Position

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**.

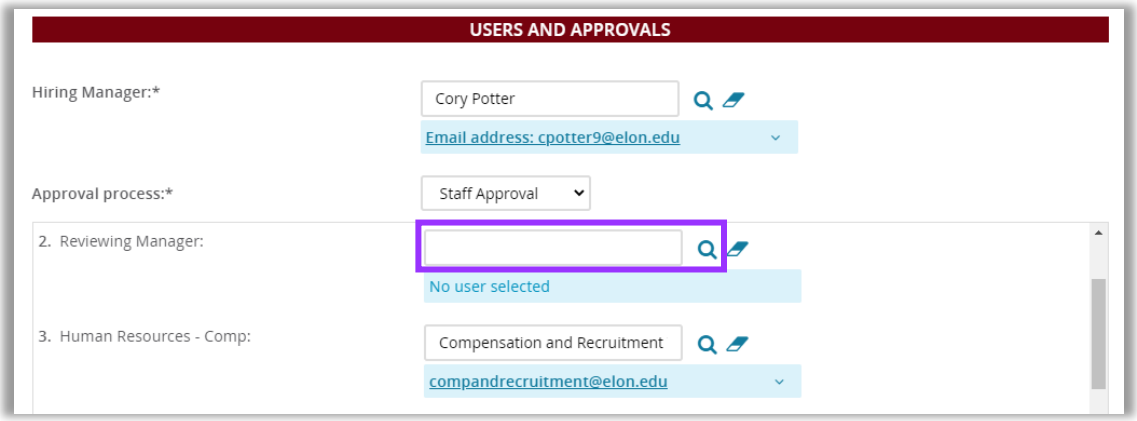
NOTE: HR will be monitoring PAR forms and running parallel processes in PageUp to assess system behavior related to record retention in combination with current internal processes in a stabilization period after initial launch of PageUp.

Approval Process for Position Descriptions

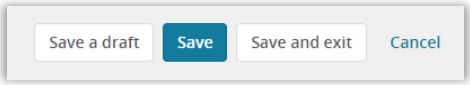
1. The Hiring Manager creates a position description.
2. The approval process (workflow) is required and is selected from a dropdown list.



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 pre-populate. 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 (🔍) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.



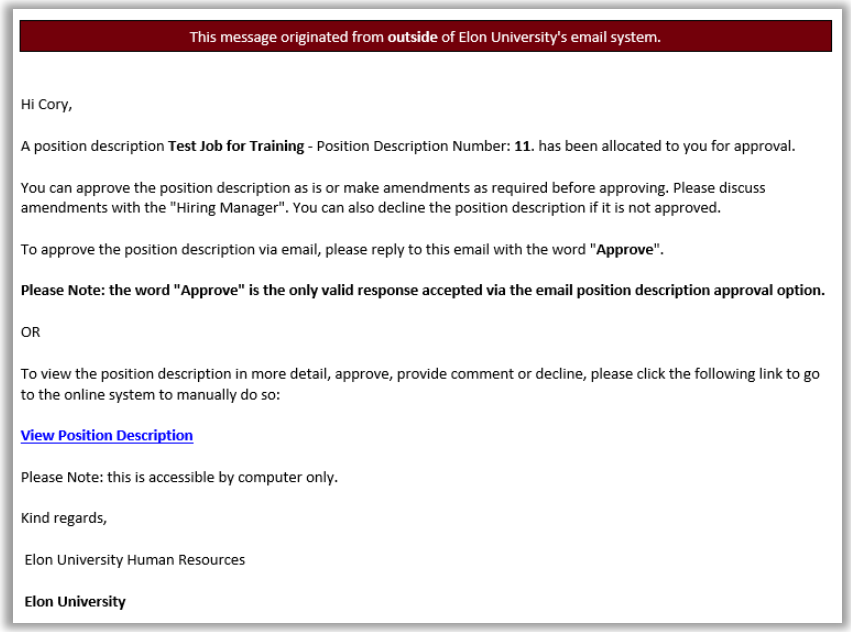
1. Scroll to the bottom of the page and select **Save** or **Save and Exit.**



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

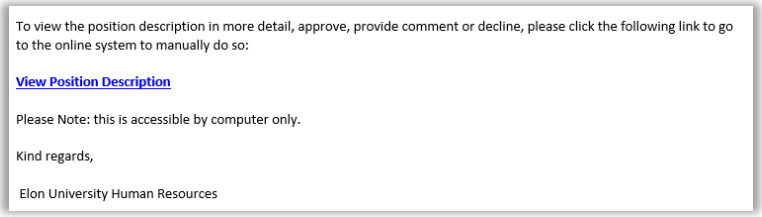
Elon University

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:

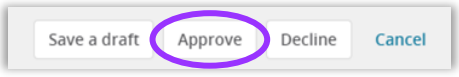
View Position Description

Please Note: this is accessible by computer only.

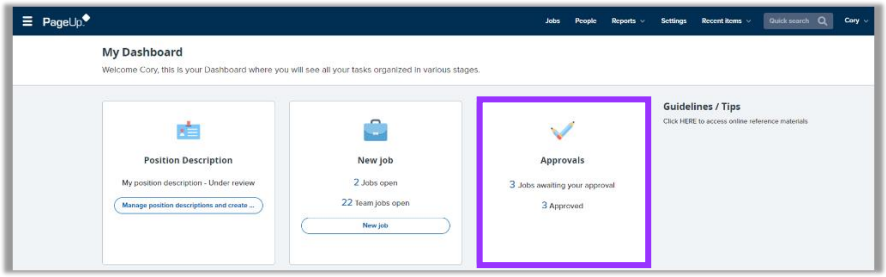
Kind regards,

Elon University Human Resources

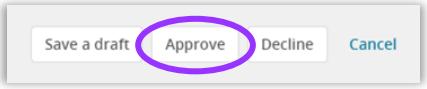
    b. You will need to use Elon's Single Sign On (SSO) process to log into PageUp.
    c. Once you are viewing the position description, scroll to the bottom of the page to click on the **Approve** button.



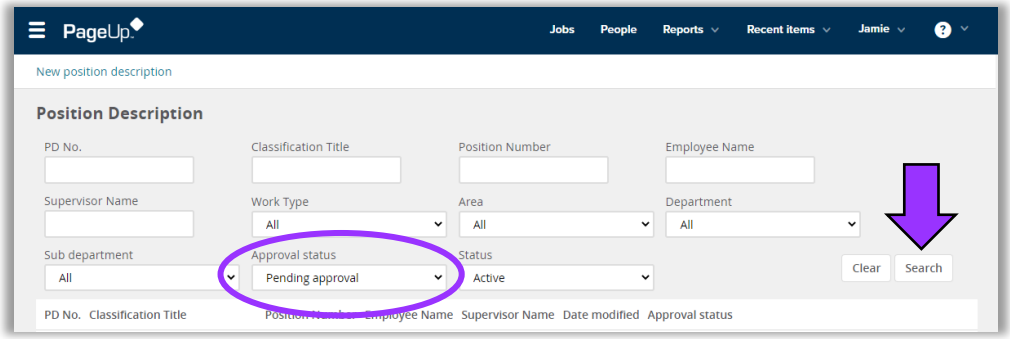
2. My Dashboard
    a. On the **My Dashboard** screen, find the **Approvals** tile.
    b. Click on the blue number (if greater than zero) beside "**Jobs awaiting your approval**".



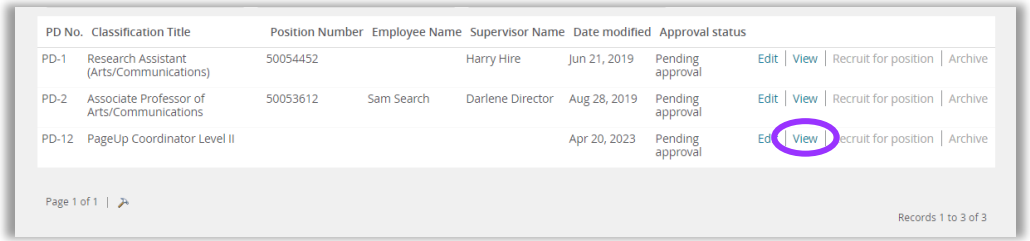
    c. Click **View** to the right of the position description you are wanting to approve.
    d. Once you have reviewed the specific position description, scroll to the bottom of the page to click on the **Approve** button.



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.



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



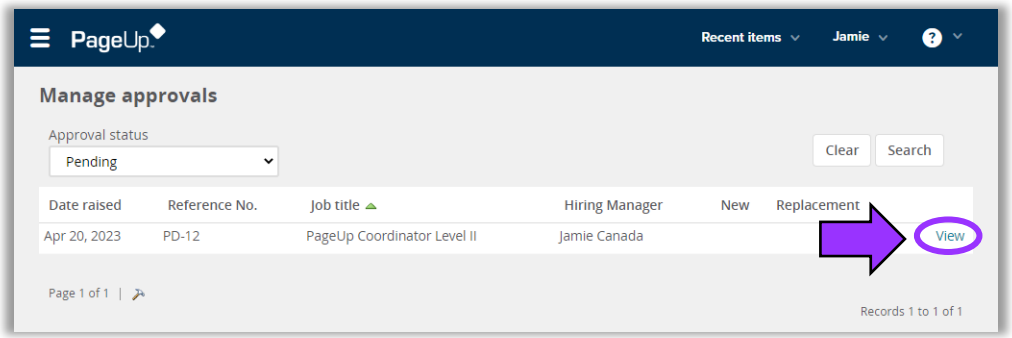
vi. After reviewing the position description, scroll to the bottom of the page and click on the **Approve** button.

b. Click on **Approvals** under the **Workflows** heading.

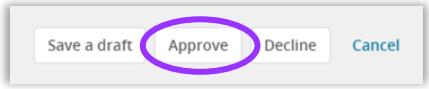
i. On the **Manage Approvals** screen select **Pending** from the Approval Status dropdown list.

ii. Then, click the **Search** button on the right side of the screen.

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



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

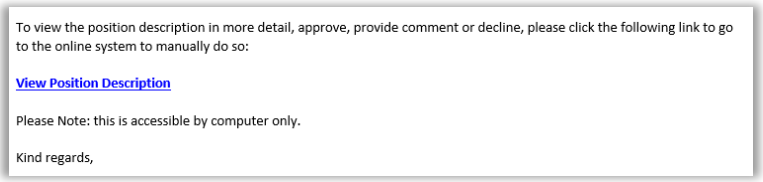


Decline a Position Description

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

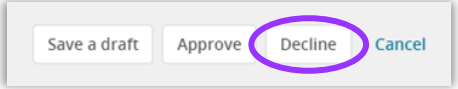
1. Via an Email

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

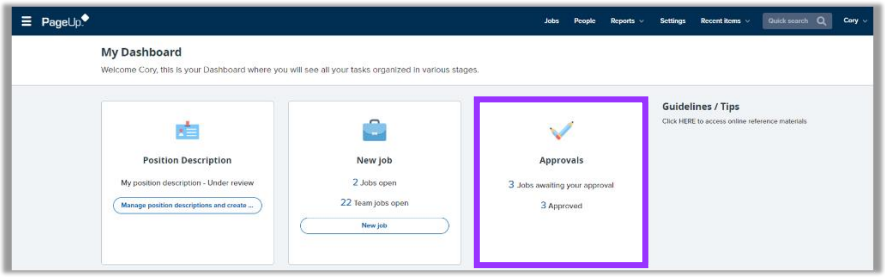


b. You will need to use Elon's Single Sign On (SSO) process to log into PageUp.

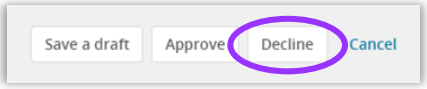
c. Once you are viewing the position description, scroll to the bottom of the page to click on the **Decline** button.



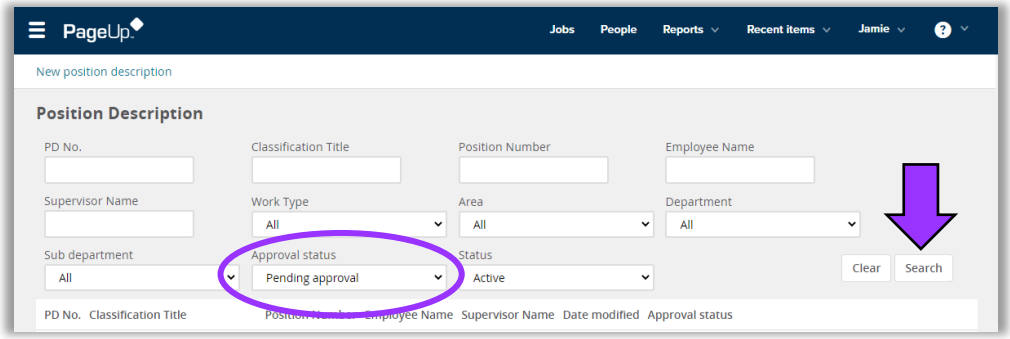
2. My Dashboard
    a. On the **My Dashboard** screen, find the **Approvals** tile.
    b. Click on the blue number (if greater than zero) beside "**Jobs awaiting your approval**".



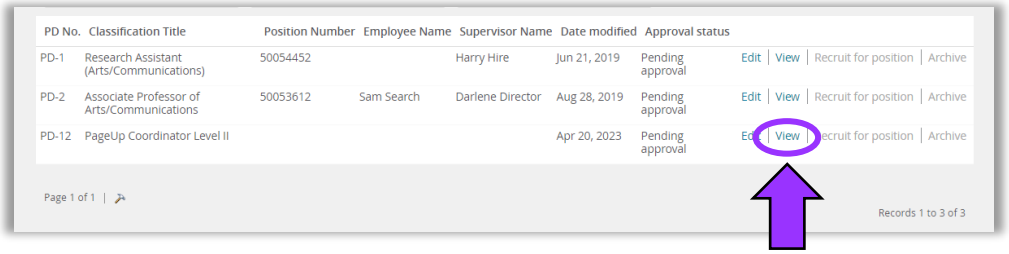
    c. Click **View** to the right of the position description you are wanting to decline.
    d. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Decline** button.



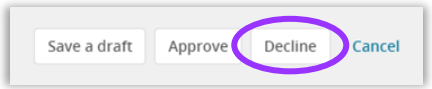
3. To use the Side Menu (Two options):
    a. Click on the Side menu and select **Manage Position Descriptions** under the **Jobs** heading.
        i. Find the Classification Title of the position you are to approve.
        ii. Be sure you have cleared any other search criteria by clicking on the **Clear** 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.



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



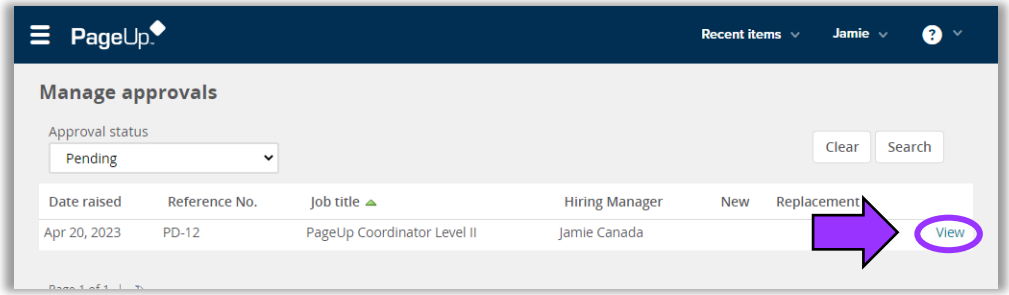
vi. After reviewing the position description, scroll to the bottom of the page and click on the **Decline** button.



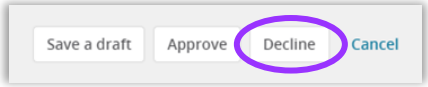
b. Click on **Approvals** under the **Workflows** heading.

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.

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

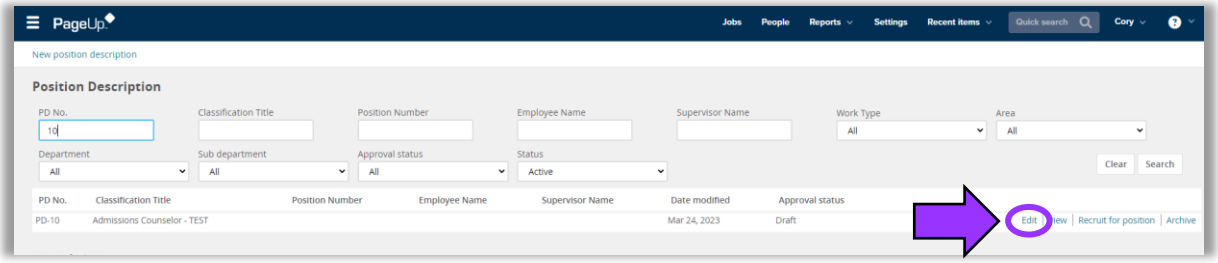


4. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Decline** button.



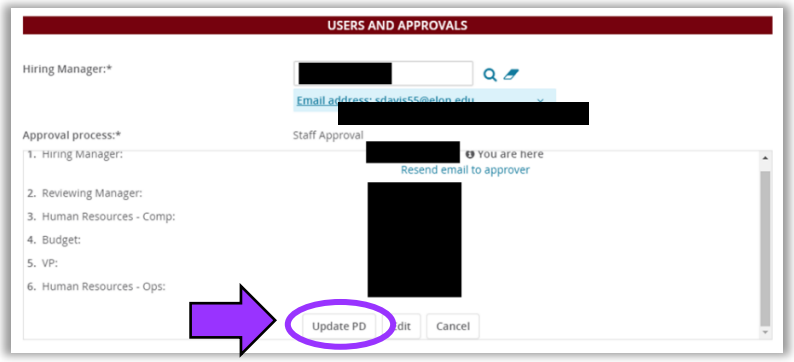
Restart a Position Description Approval Process

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.

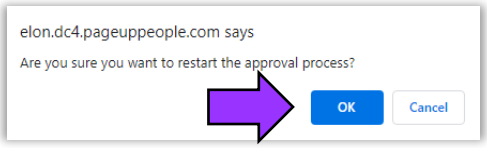


3. Scroll down to the USERS AND APPROVALS section.

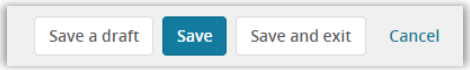
4. Click on the **Update PD** button.



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.



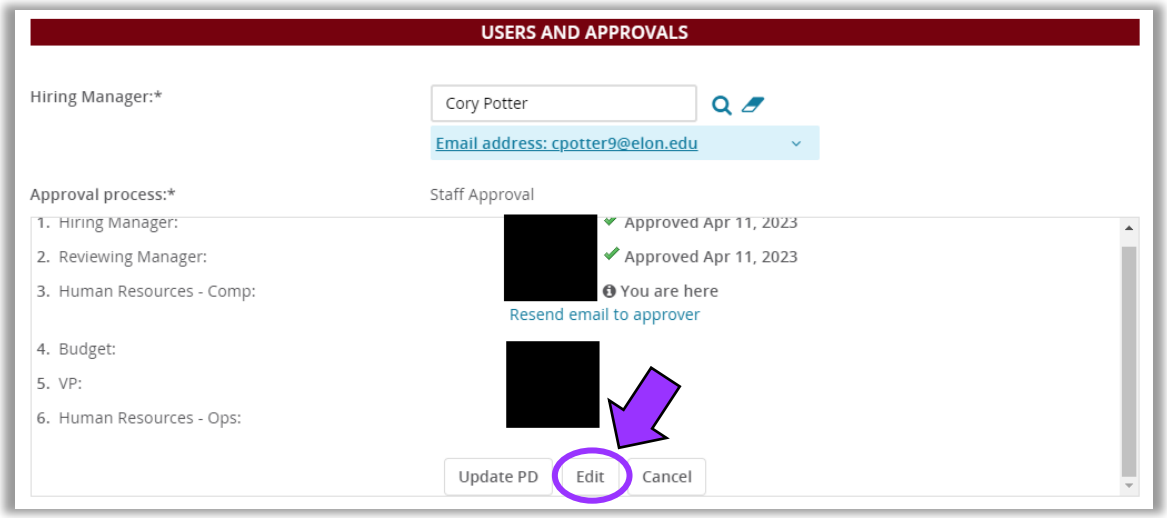
6. Go to the USERS AND APPROVALS section of the position description and select the appropriate **Approval Process** from the dropdown list.
7. When you select an approval process (e.g. Faculty Approval, Staff Approval, Title / Salary Change Approval), the list of approver types required for that process 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 (🔍) 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.**



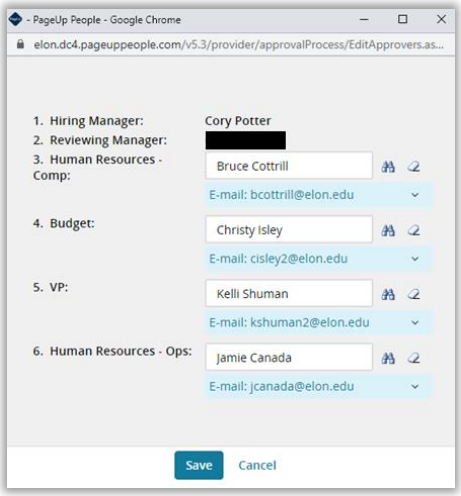
Assign a Different Approver

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.



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 ( ) 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**.

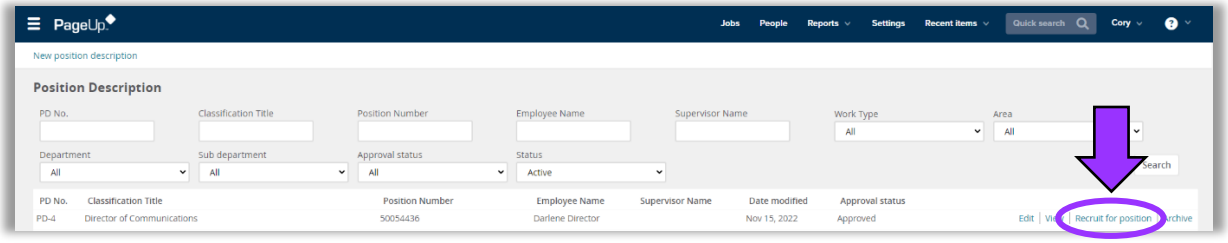


Recruit for a Position

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.



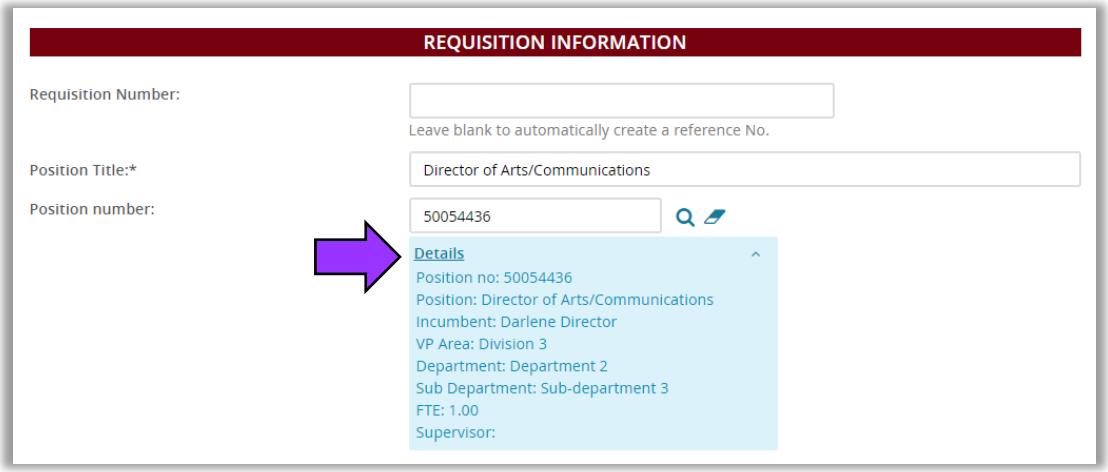
2. Fill in the requisition details in the sections as described below.

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.



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.

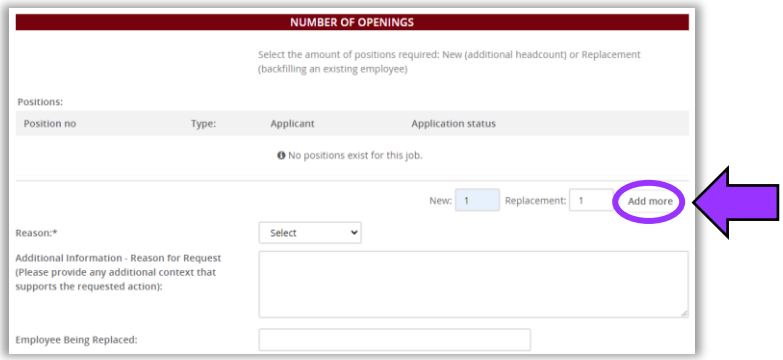
Supervisor – Type the name of the position's supervisor in the text field. Select the magnifying glass ( ) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

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.



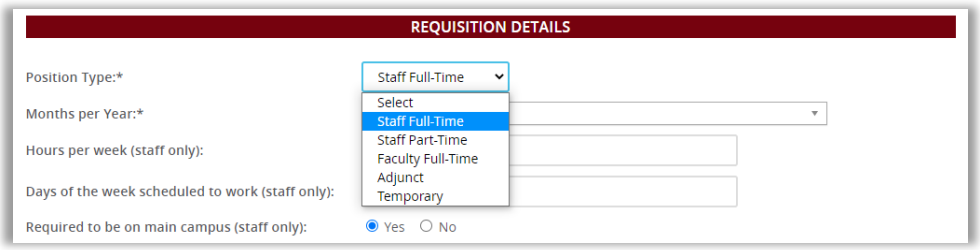
Reason (*) – From the dropdown list, select a reason for the request (new position, resignation, termination, leave coverage, or restructure).

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.

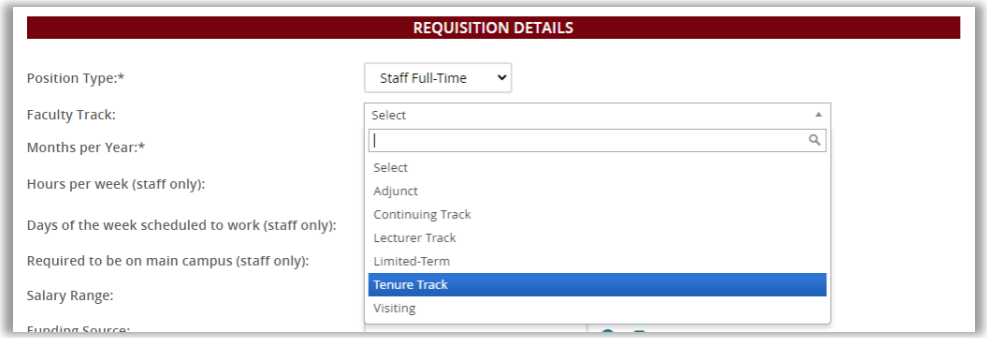
Employee Being Replaced – If known, type the first and last of the person being replaced (backfilling an existing employee).

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.



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.



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 ( ) 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.

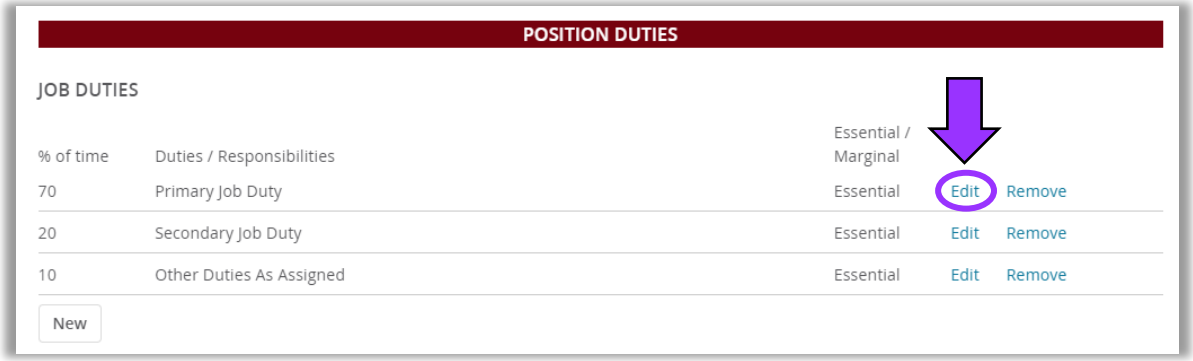
Preferred Education and Experience – Verify that the preferred education and experience qualifications are correct. If blank, you may add the preferred qualifications.

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.

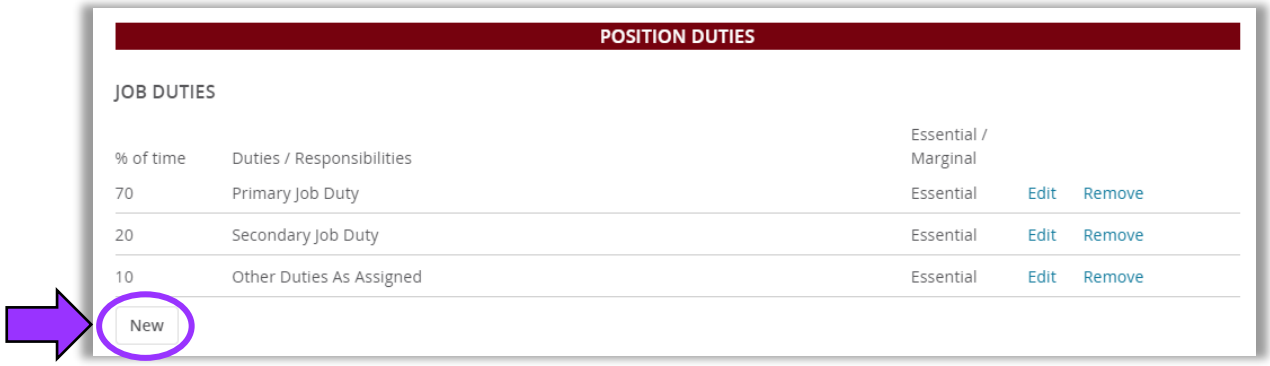
Knowledge, Skills, Abilities – If known, verify the required knowledge, skills, and abilities are correct. If blank, you may add the preferred qualifications.

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.



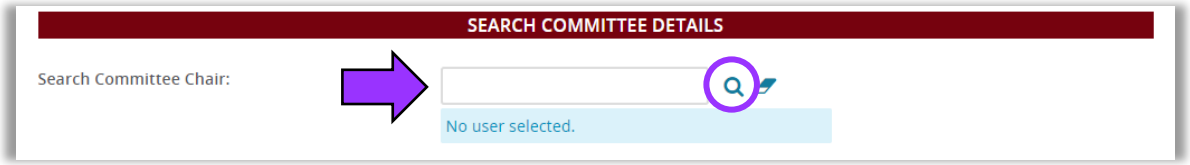
2. You also have the option to remove an area of duties / responsibilities.
3. To add new position duties, select the **New** button beneath the existing duties.



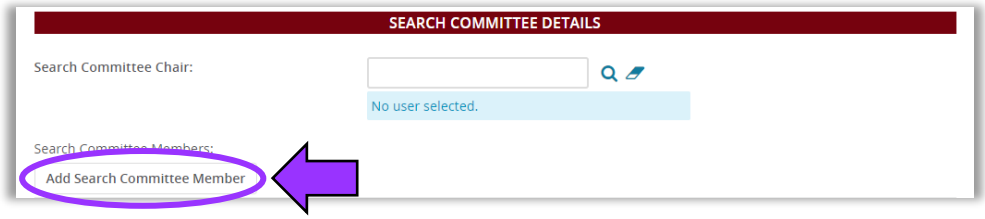
How to Create a Search Committee

SEARCH COMMITTEE DETAILS

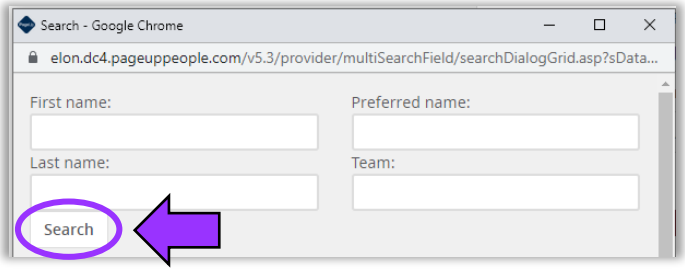
1. Type the name of the **Search Committee Chair** in the text field.
2. Click on the magnifying glass (🔍) to search for that user. An email address will populate the blue box beneath the Search Committee Chair's name when the user is found. Use the magnifying glass to help you easily search for Elon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



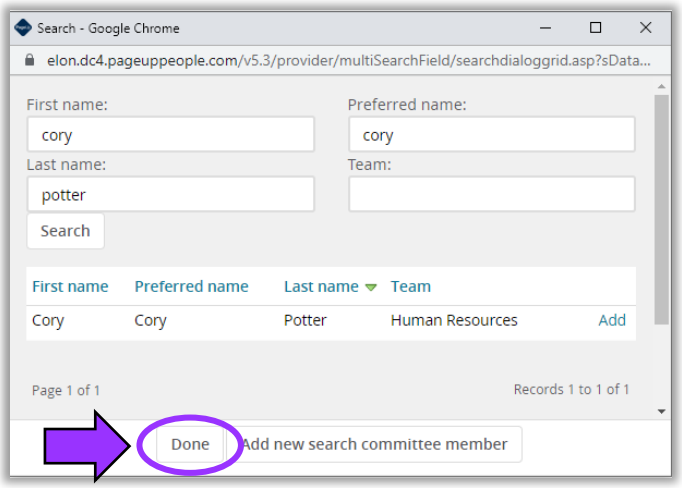
3. To add Search Committee Members, click the **Add Search Committee Member** button. Please remember to allow pop-ups within your browser, because this action causes a pop-up window to appear.



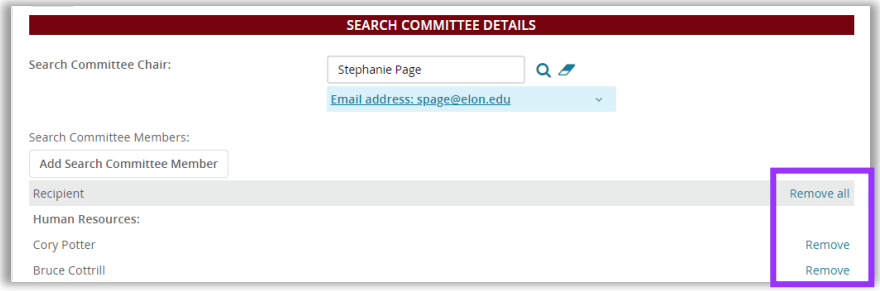
4. In the pop-up window, conduct a search of PageUp users to add an individual as a search committee member by entering search criteria and clicking the **Search** button.



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 (compandrecruitment@elon.edu) 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.



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.**



POSTING DETAILS (*=Required)

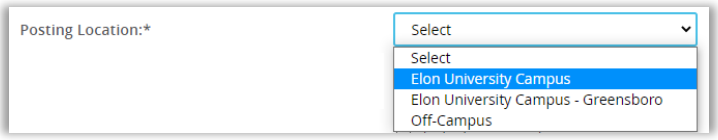
Date Opened – Enter the date when the position opened. You can click on the calendar icon ( ) to select a date from a calendar.

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

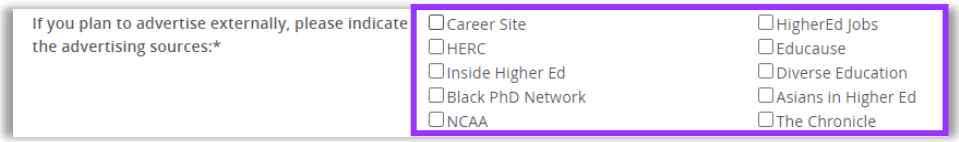
Open Until Filled – Select **Yes** or **No** from the dropdown list.

Posting to Close – If known, enter a date and time when the job posting will close. You can click on the calendar icon ( ) 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.



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



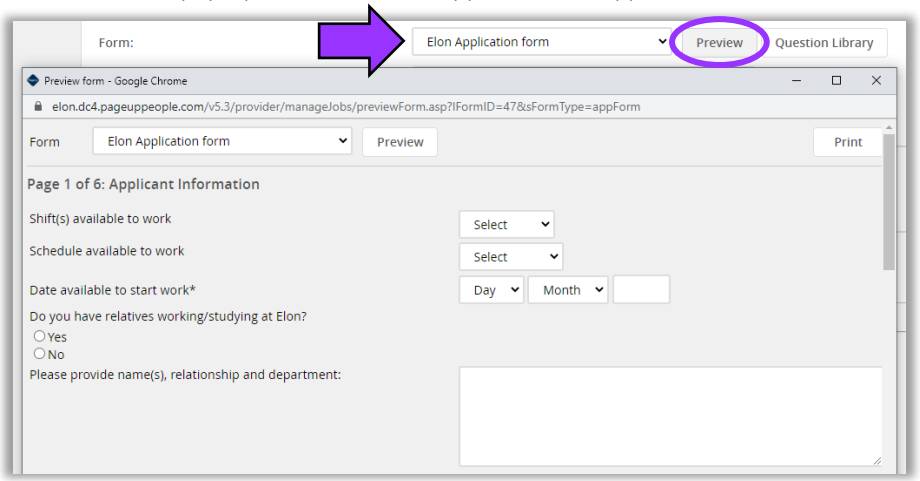
Please List Any Other Sources – Add the names of the additional advertising source that you plan to use.

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

Form – From the dropdown list,

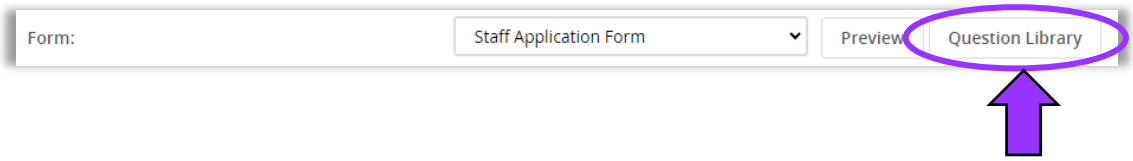
1. Select the **Staff Application Form** if applicants are to fill out a brief application form with essential questions and upload a cover letter, resume or curriculum vitae, and a list of references.
   or
2. Select the **Staff Application Form – No Resume** if applicants are not expected to upload 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.

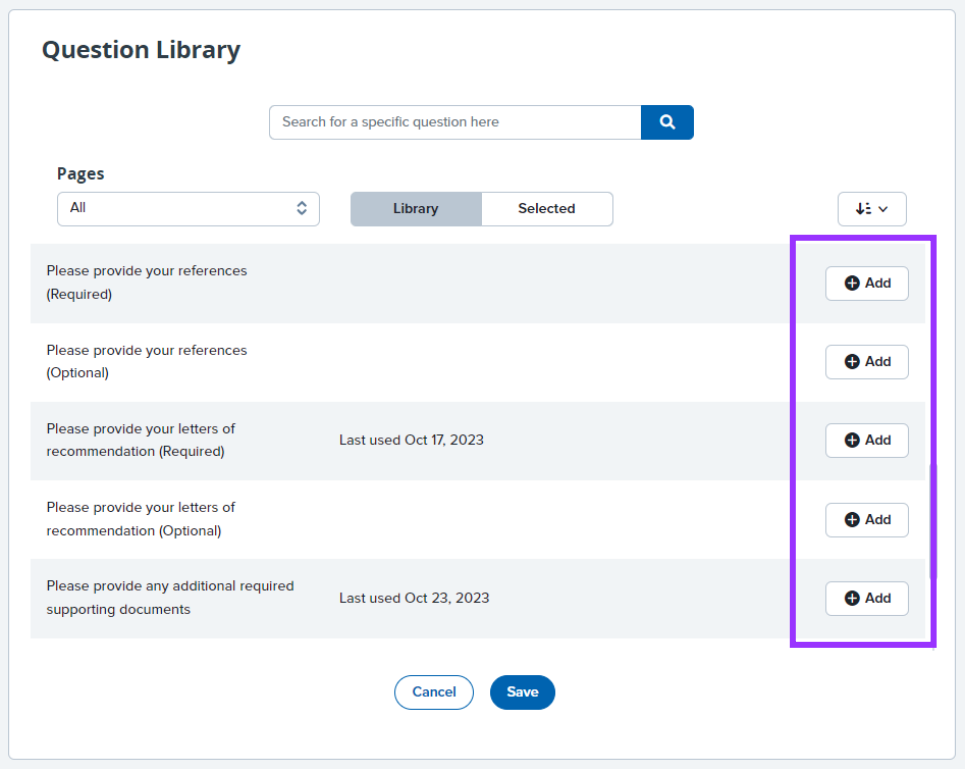


Optional Step: Adding Questions from the Question Library

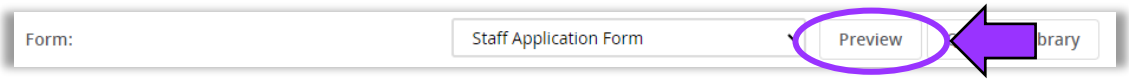
1. The Question Library is accessed by clicking on **Question Library** after you have selected the appropriate application form.



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.



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.**

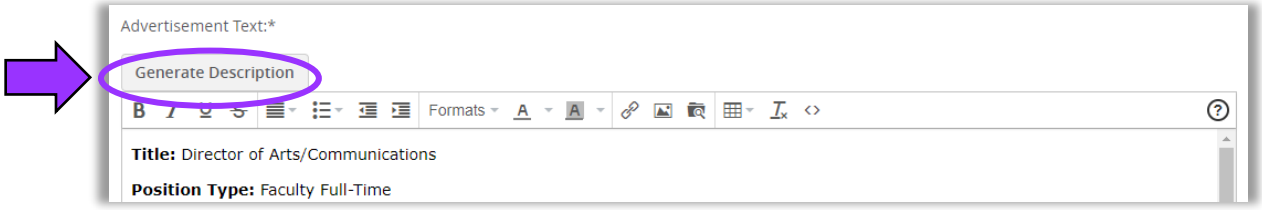


NOTE: If you choose to customize the application using the Question Library, it will create a new form title to incorporate the requisition number for which the application was customized.

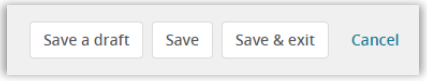
Special Instructions to Applicants – If there are any special circumstances for the applicants to consider (e.g. must live in on-campus housing), enter the special instructions in the text box.

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.



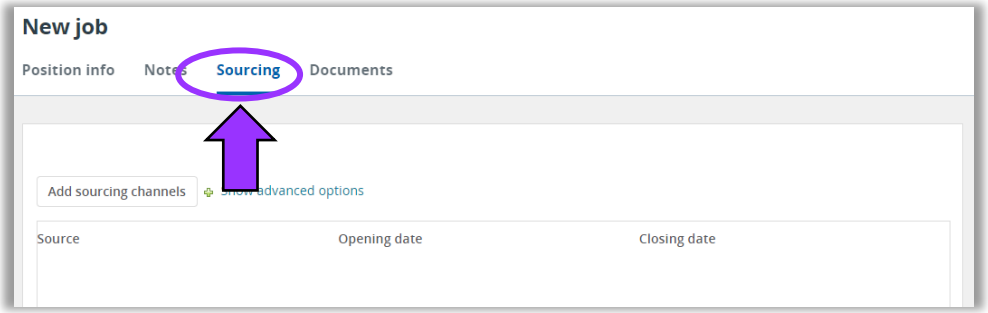
3. You may edit the advertising text even if you chose to click on the **Generate Description** button.
4. Be sure to scroll to the bottom of the page and click on one of the **Save** buttons to ensure your advertising text edits are captured. It is recommended that you click **Save a draft** or **Save**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



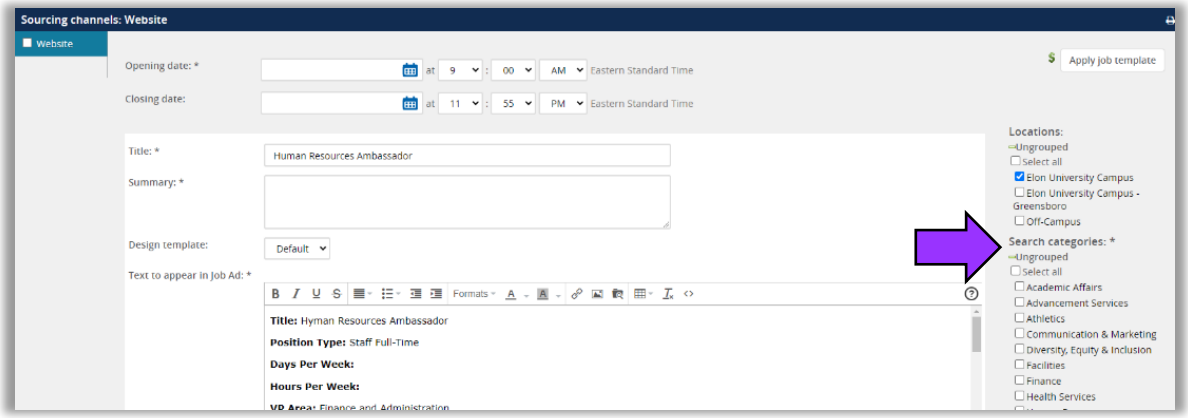
Posting to the Elon Careers Website

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

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



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.



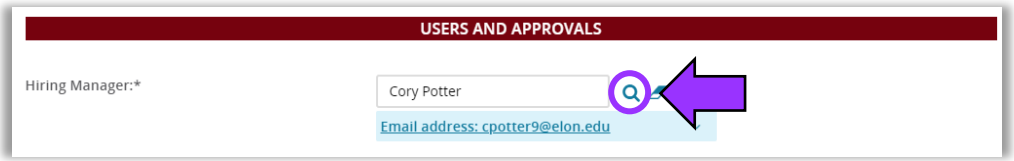
Approval Process for Posting

USERS AND APPROVALS (*=Required)

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

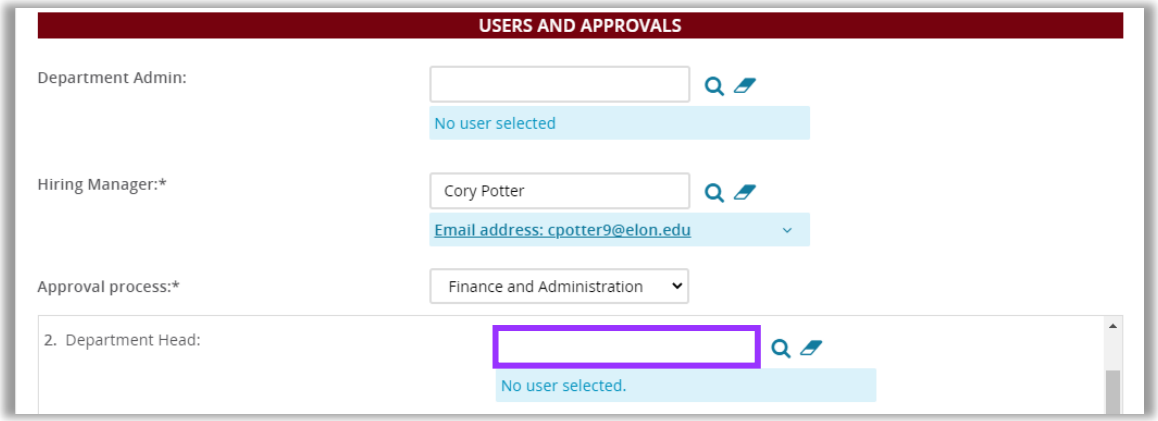
Department Admin – The Department Admin can act as a proxy for Hiring Managers and can perform all the actions that a Hiring Manager can perform; however, they are not able to view the requested salary field. The salary field would need to be completed by the Hiring Manager in the first approval step.

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.



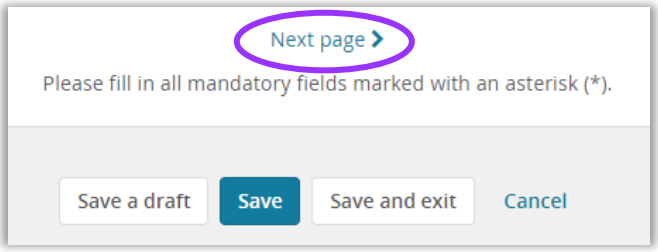
Approval Process (*) – Using the dropdown list, select the **Approval Process** that best matches the job requisition needs based on the specific division.

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 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. 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 ( ) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

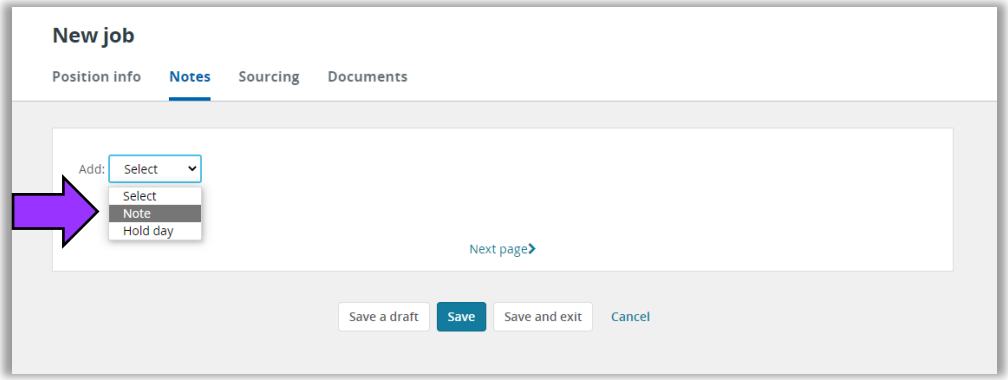


Optional Step: Adding Notes to a Position Requisition

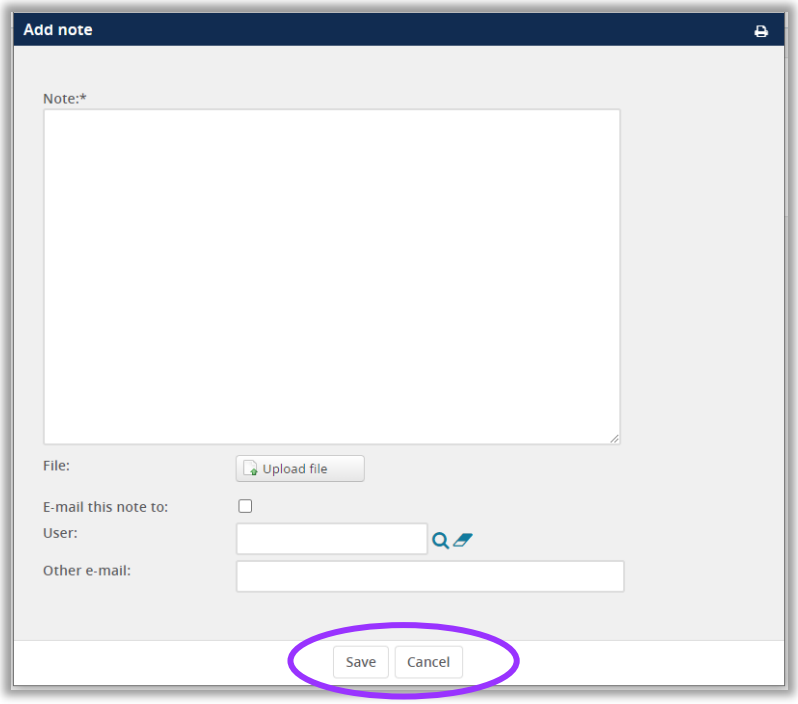
Toward the bottom of the screen (above the **Save** buttons), you can click on **Next page >** (blue text) to get to the **Notes** screen.



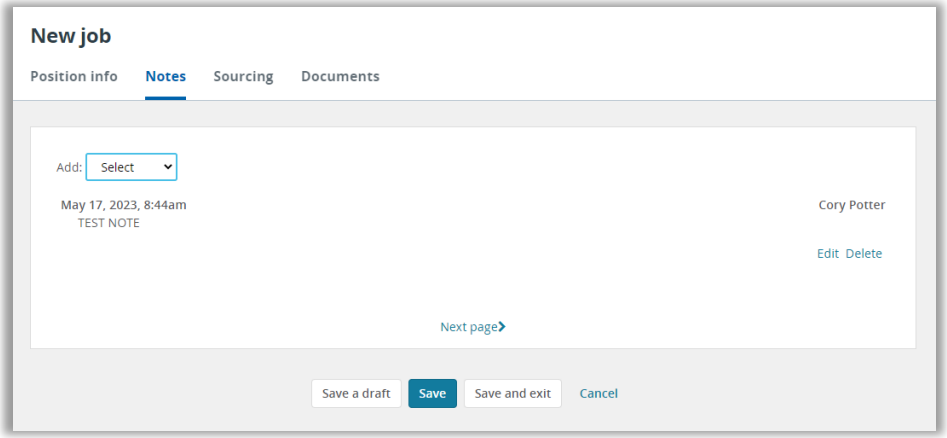
To add a special instructional note to the position description (such a split funding), select **Note** from the dropdown list.



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.

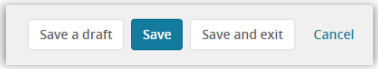


Once you click the **Save** button, you have the options to (a) edit the note, (b) delete the note, (c) add another note, (d) navigate to the **Position Info** tab, or (e) navigate to the **Documents tab** (by clicking on **Next page >** or clicking on **Documents** on the menu.



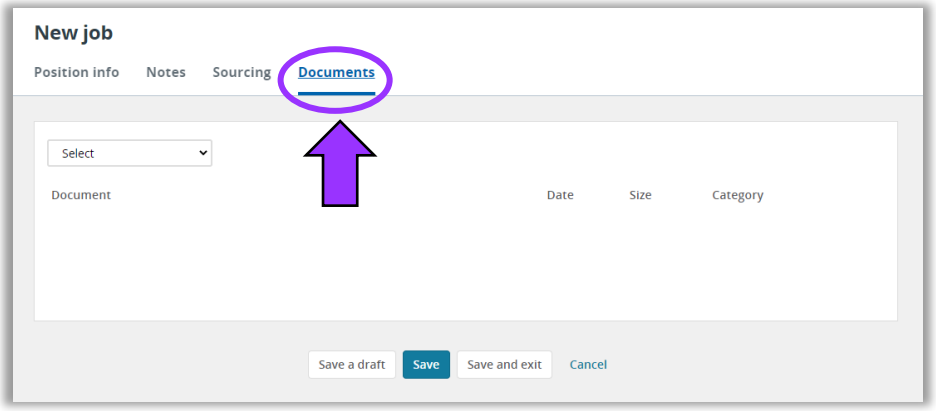
OR

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

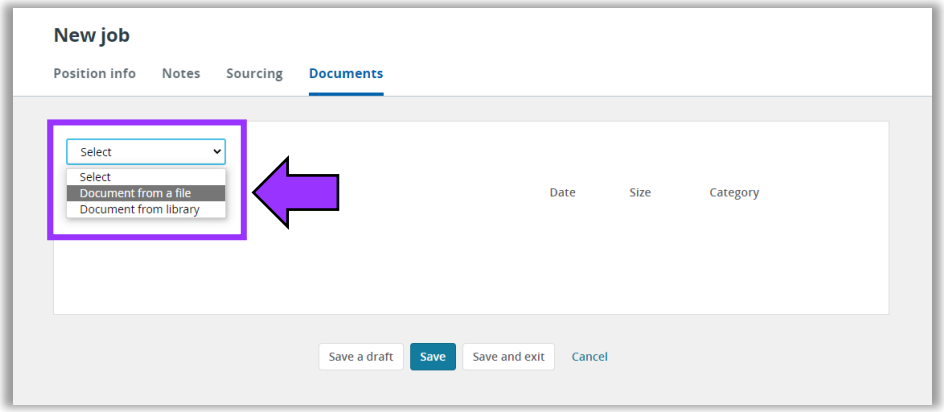


Optional Step: Adding Documents to a Position Requisition

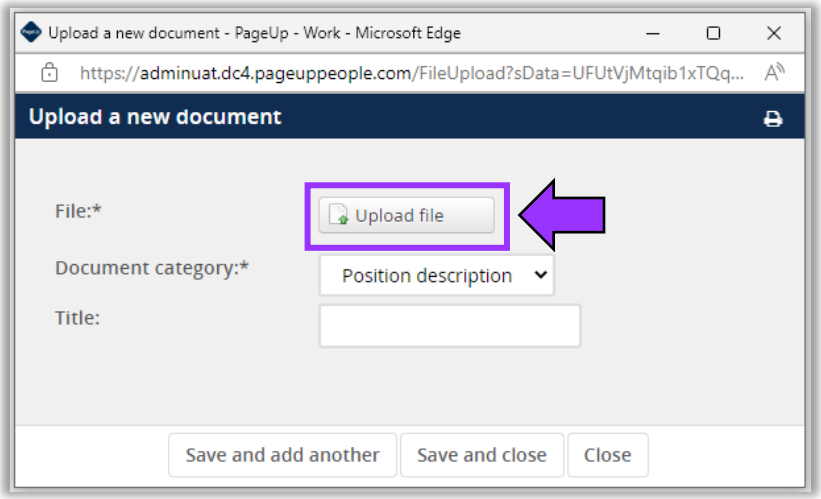
Navigate to the **Documents tab** by clicking on **Documents** on the menu, after adding optional notes and sourcing (see sections above).



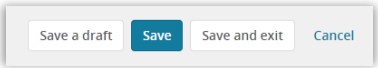
Select **Document from a file** from the dropdown list to add a document (such as an updated organizational chart)



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



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 [redacted] - Job Number: [redacted] 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: [redacted]

Department: [redacted]

Manager: [redacted]

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 View Job Requisition

Kind regards,

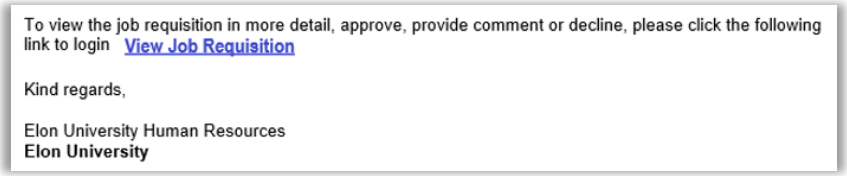
Elon University Human Resources
Elon University

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.



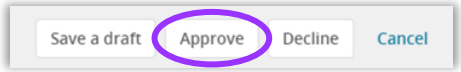
To view the job requisition in more detail, approve, provide comment or decline, please click the following link to login View Job Requisition

Kind regards,

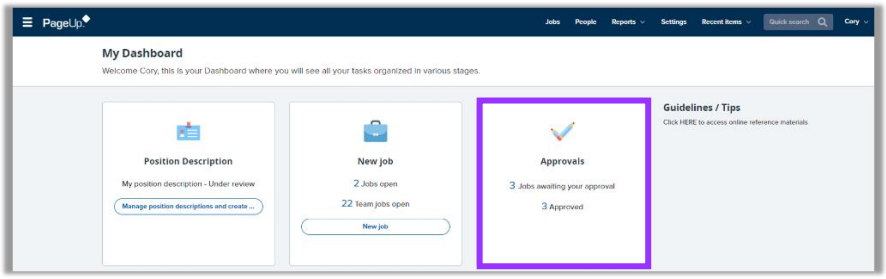
Elon University Human Resources
Elon University

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

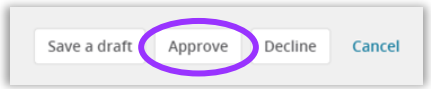
c. Once you are viewing the job requisition, scroll to the bottom of the page to click on the **Approve** button.



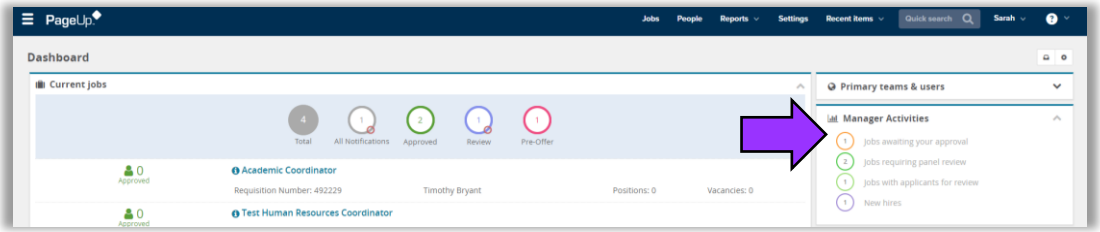
2. My Dashboard
   a. On the **My Dashboard** screen, find the **Approvals** tile.
   b. Click on the blue number (if greater than zero) beside "**Jobs awaiting your approval**".



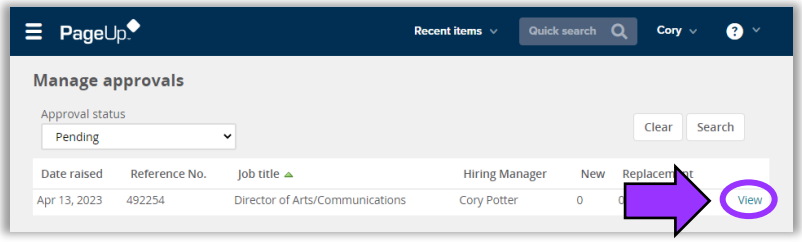
   c. Click **View** to the right of the job requisition you are wanting to approve.
   d. Once you are viewing the specific job requisition, scroll to the bottom of the page to click on the **Approve** button.



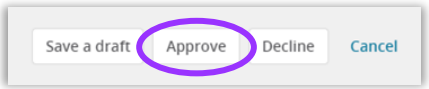
3. (Hiring Managers)
   a. Within the **My PageUp** Dashboard view, Hiring Managers have an area called **Manager Activities** on the right-hand side.



   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.

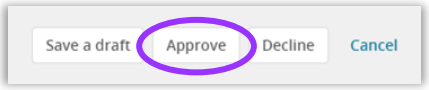


d. Once you are viewing the specific position description, scroll to the bottom of the page to click on the **Approve** button.



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.

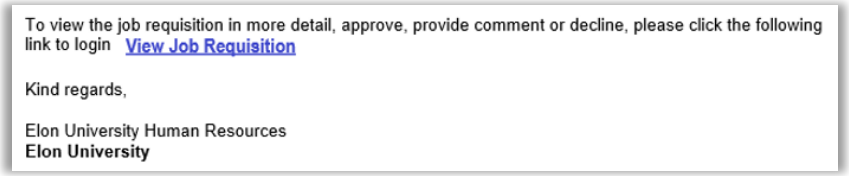
   d. Click **View** to the right of the job requisition you are wanting to approve.
   e. Once you are viewing the specific job requisition, scroll to the bottom of the page to click on the **Approve** button.



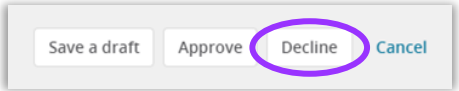
Decline a Job

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

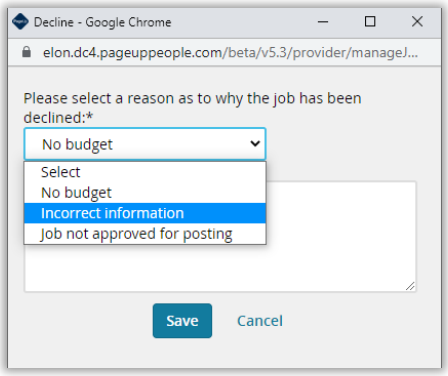
1. Via an Email
   a. Click on the **View Job Requisition** link provided in a system-generated email.



   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.



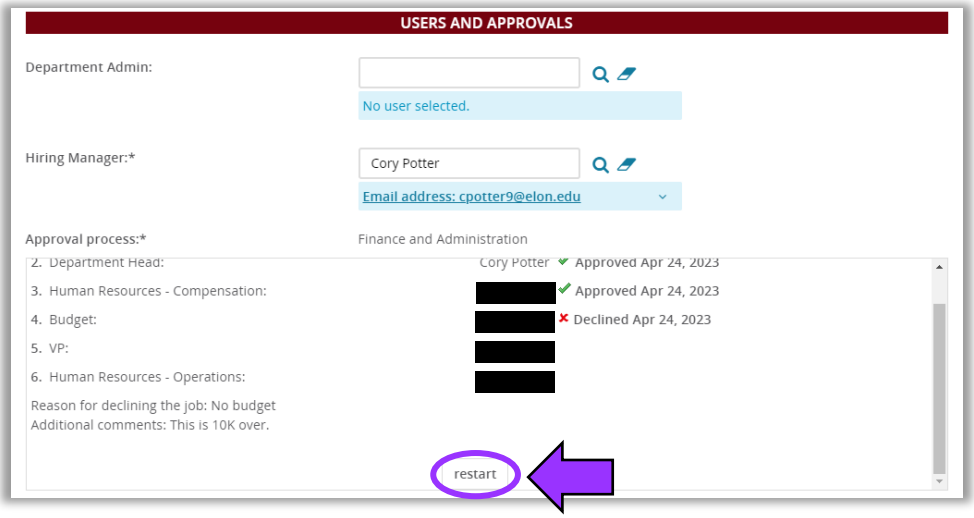
   d. Please remember to allow pop-ups within your browser. As an approver, once you select **Decline** a pop-up box appears requiring a reason as to why the job has been declined. Select the appropriate reason from the dropdown list.



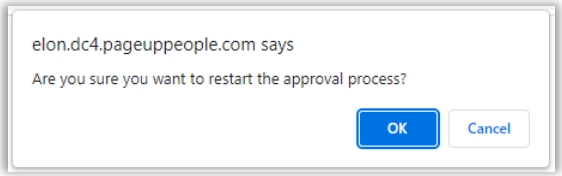
e. There is a textbox to provide further reason details.

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.



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

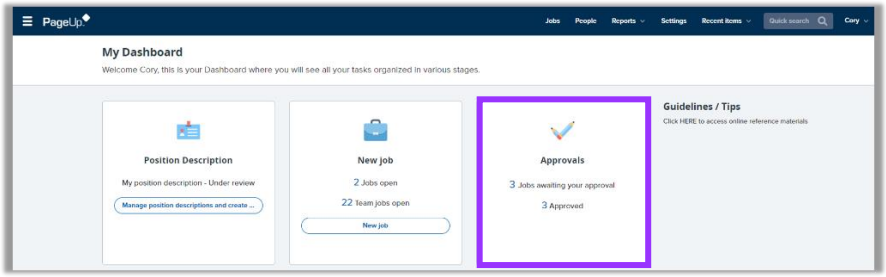


i. Navigate to the USERS AND APPROVALS section and select a new **Approval Process** from the dropdown list.

2. My Dashboard

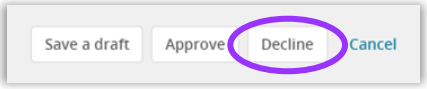
a. On the **My Dashboard** screen, find the **Approvals** tile.

b. Click on the blue number (if greater than zero) beside "**Jobs awaiting your approval".**

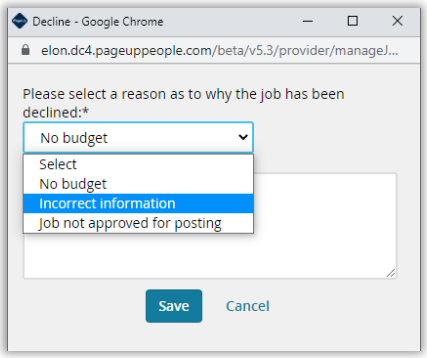


c. Click **View** to the right of the position description you are wanting to decline.

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



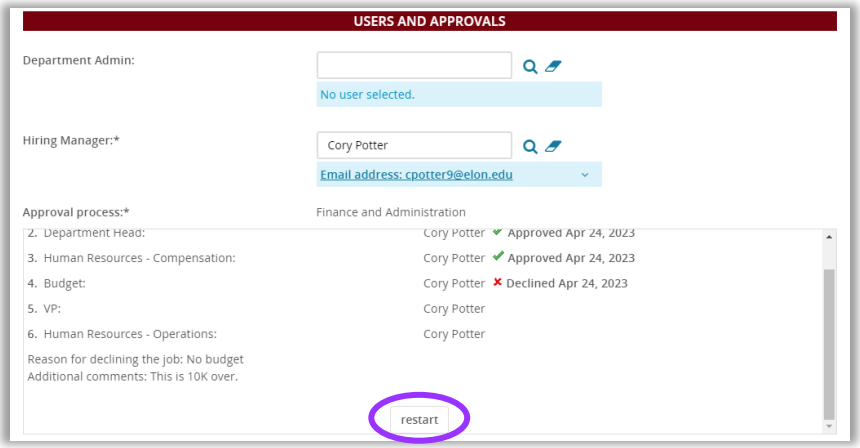
e. Please remember to allow pop-ups within your browser. As an approver, once you select **Decline** a pop-up box appears requiring a reason as to why the job has been declined. Select the appropriate reason from the dropdown list.



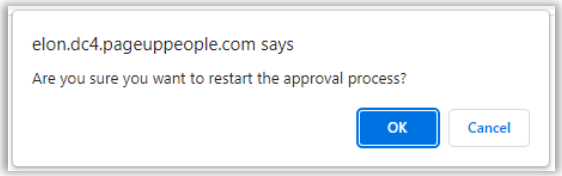
f. There is a textbox to provide further reason details.

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.

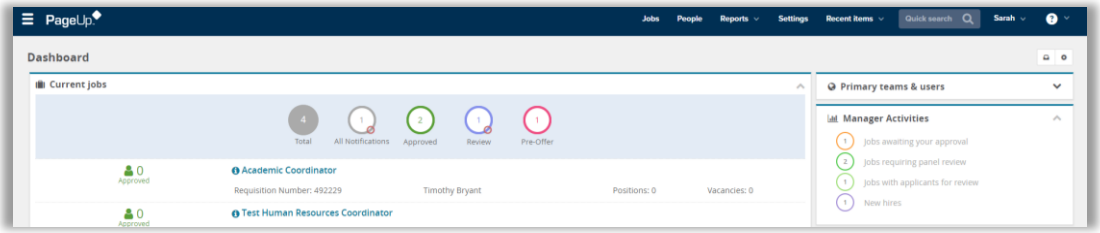


i. A pop-up will appear asking if you are sure you want to restart the approval process. Click **OK**.

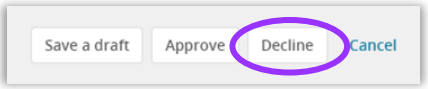


j. Navigate to the **USERS AND APPROVALS** section and select a new **Approval Process** from the dropdown list.

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

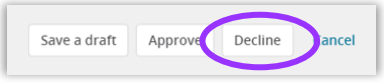


   b. Click on the linked text or number on the line entitled **"Jobs awaiting your approval"**.
   c. Click **View** to the right of the job requisition you are wanting to decline.
   d. Once you are viewing the specific job requisition, scroll to the bottom of the page to click on the **Decline** button.

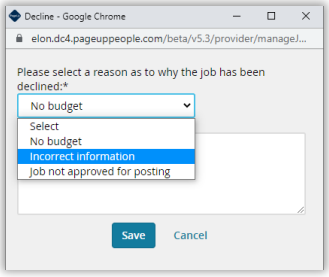


4. To use the Side Menu:
   a. Click on the Side menu and select **My Job Approvals**.
   b. Next, on the **Manage Approvals** screen select **Pending** from the Approval Status dropdown list.
   c. Then, click the **Search** button on the right side of the screen.

   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.



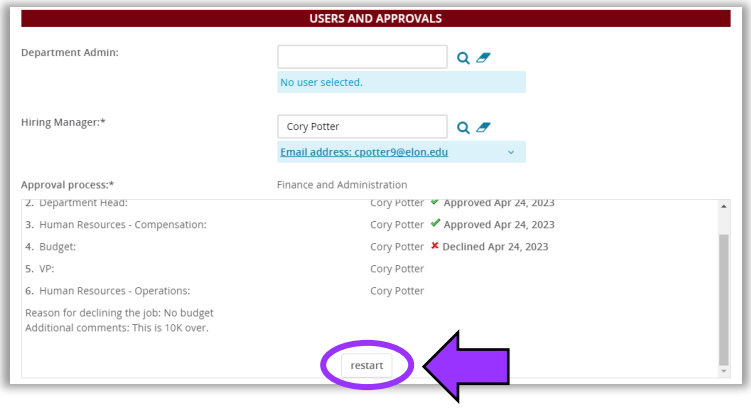
f. Please remember to allow pop-ups within your browser. As an approver, once you select **Decline** a pop-up box appears requiring a reason as to why the job has been declined. Select the appropriate reason from the dropdown list.



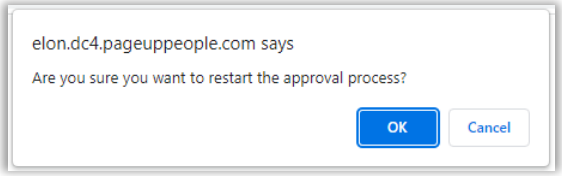
g. There is a textbox to provide further reason details.

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.



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

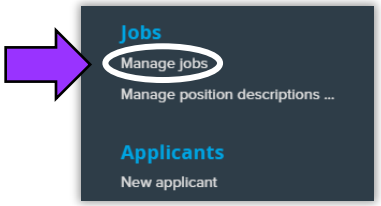
IMPORTANT NOTE: Once a job requisition is fully approved, you are not able to restart an approval process in instances when you discover that something in the job requisition needs changed, such as a title. In these cases, please contact HR's Compensation and Recruitment Team at compandrecruitment@elon.edu.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

Assign a Different Approver

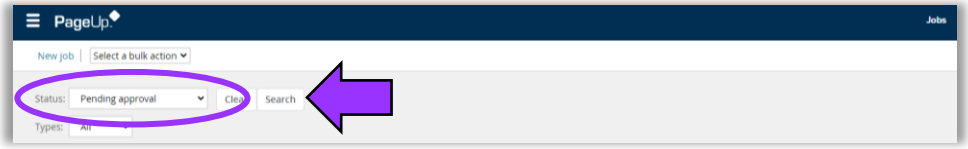
Hiring Managers: There are multiple ways to get to the specific job for which you want to assign a different approver if the approval workflow has not been fully approved (completed):

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

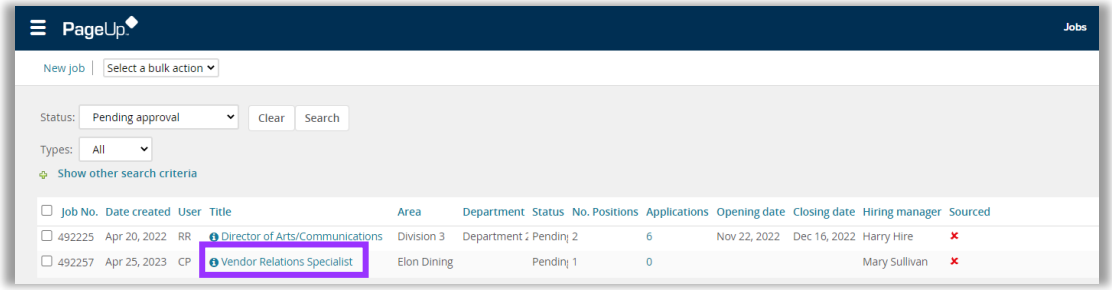
- Select **Manage Jobs** in the left Side menu.



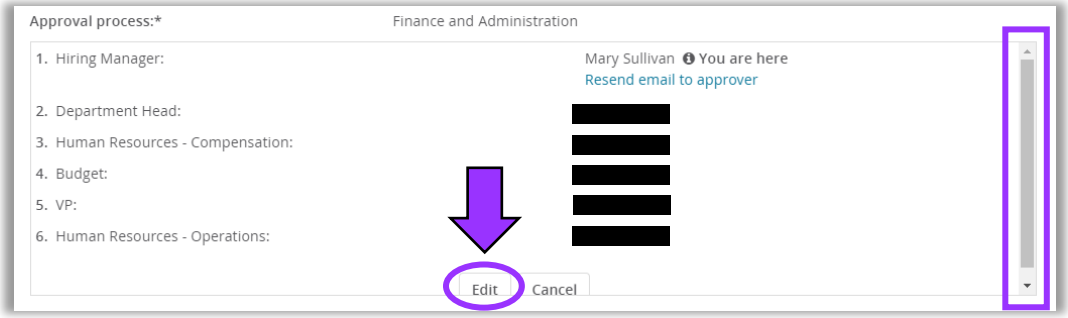
a. Set the search criteria status to **Pending Approval** and click **Search** to find the position.



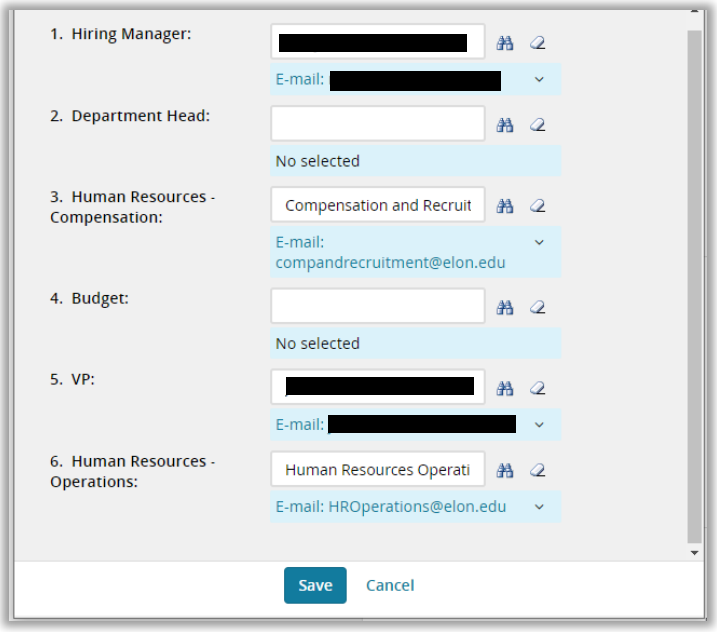
b. Click on the title of the position (blue text) in which you need to change approvers.



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.



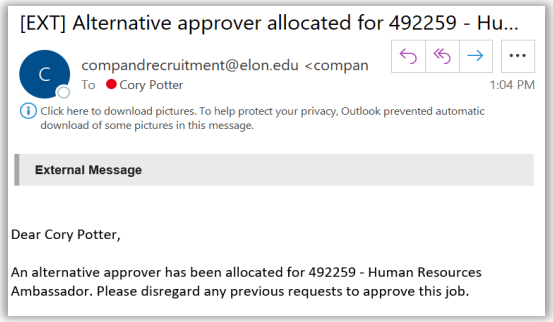
d. Please remember to allow pop-ups within your browser. A pop-up window will appear. In the pop-up window, you can 1) Type in the name of the user, 2) search for the user by clicking on the binoculars ( ), and 3) clear an entry by clicking on the eraser ( ).



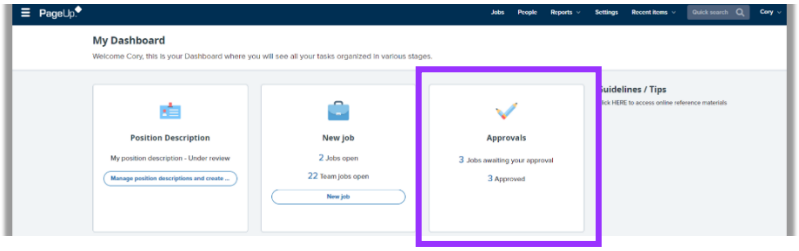
e. Click **Save** at the bottom of the pop-up window once you have assigned the revised approver(s) in the workflow.

f. The changes will appear in the Approval process workflow within the position requisition.

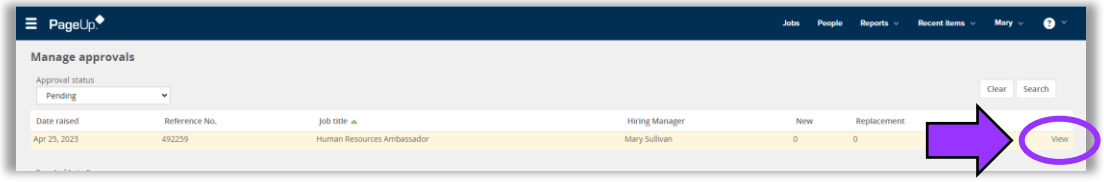
g. An email is generated to the user being replaced of the alternate approver assignment.



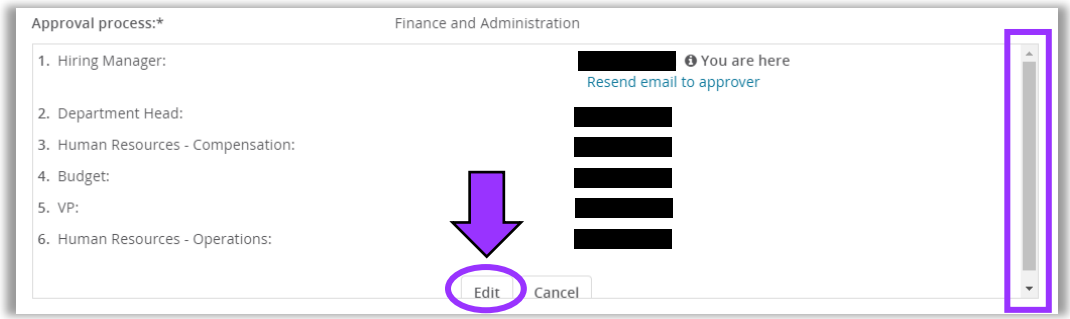
- On the **My Dashboard** screen, find the **Approvals** tile.
  a. Click on the blue number (if greater than zero) beside "**Jobs awaiting your approval**".



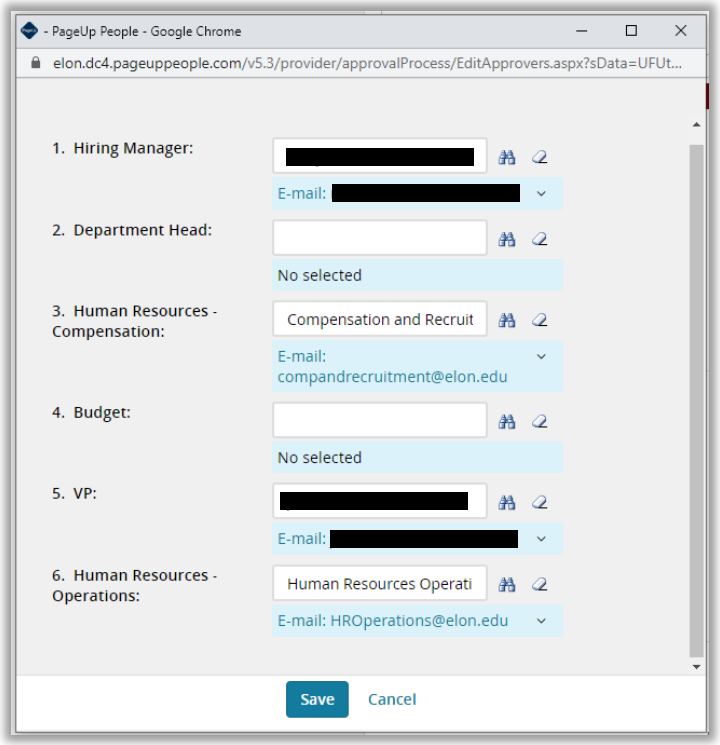
b. Click **View** to the right of the Job Title that you are wanting to assign a different approver.



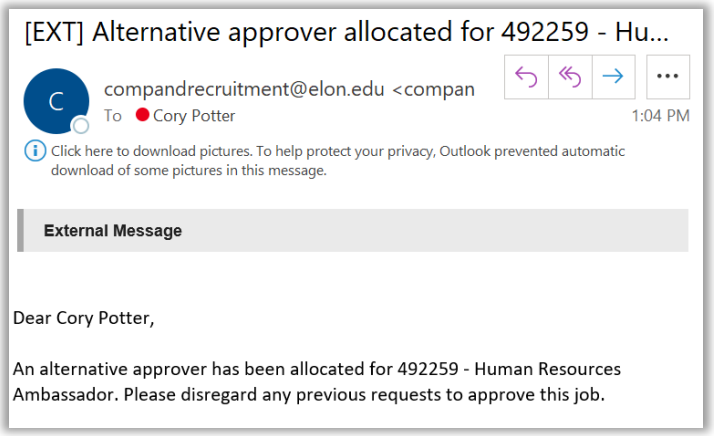
c. Scroll down to the USERS AND APPROVALS section and click **Edit** button to edit the approvers in the workflow. In some cases, you may have to scroll down *within* the Approval process text window to reveal the **Edit** button.



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 ( ), and 3) clear an entry by clicking on the eraser ( ).



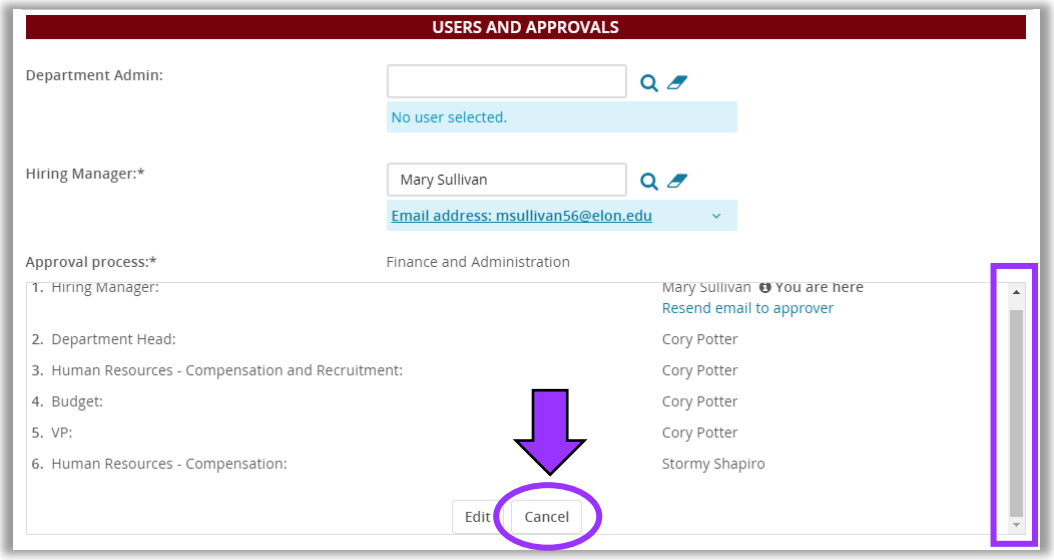
2) Click **Save** at the bottom of the pop-up window once you have assigned the revised approver(s) in the workflow.
3) The changes will appear in the Approval process workflow within the position requisition.
4) An email is generated to the user being replaced of the alternate approver assignment.



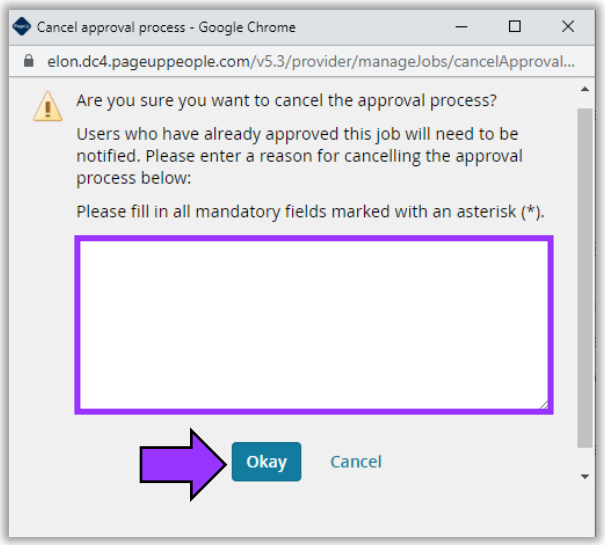
Cancel an Approval Process

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.



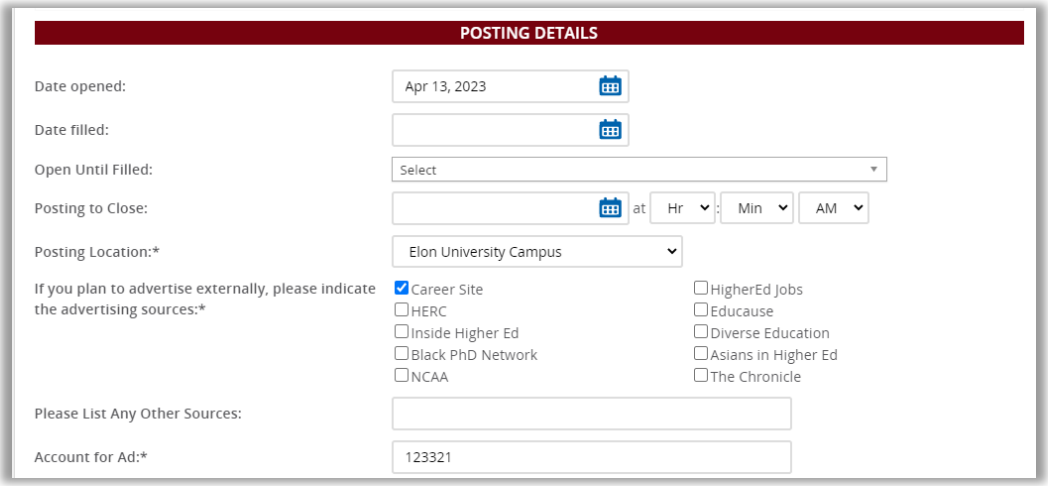
4. Please remember to allow pop-ups within your browser. A pop-up warning window will appear. In the pop-up window, you are required to provide a reason for cancelling the approval process.
5. After entering your reason for cancelling, click the **Okay** button.



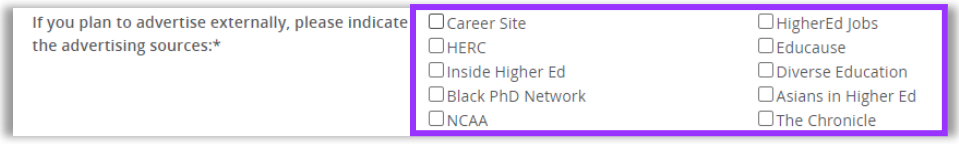
6. The PageUp system returns to the position information tab for that position. A new approval process can be initiated, and edits can be made.

Recruiting Sources

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



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



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.

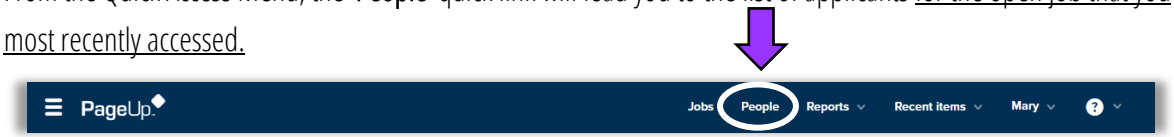
Review Applicants

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

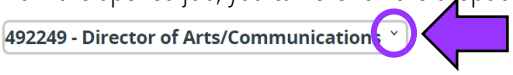
Navigate to the Applicants

There are several options to navigate to the applicants.

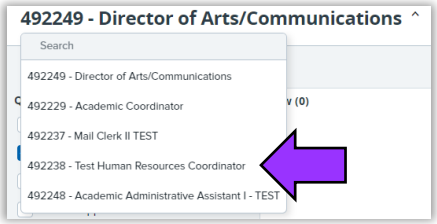
- From the Quick Access Menu, the '**People'** quick link will lead you to the list of applicants for the open job that you most recently accessed.



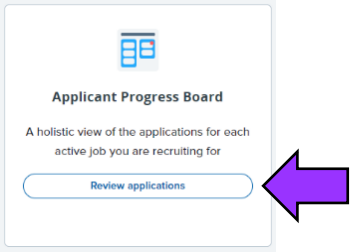
  1. From the opened job, you can click on the dropdown arrow next to the job title to select another position.



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

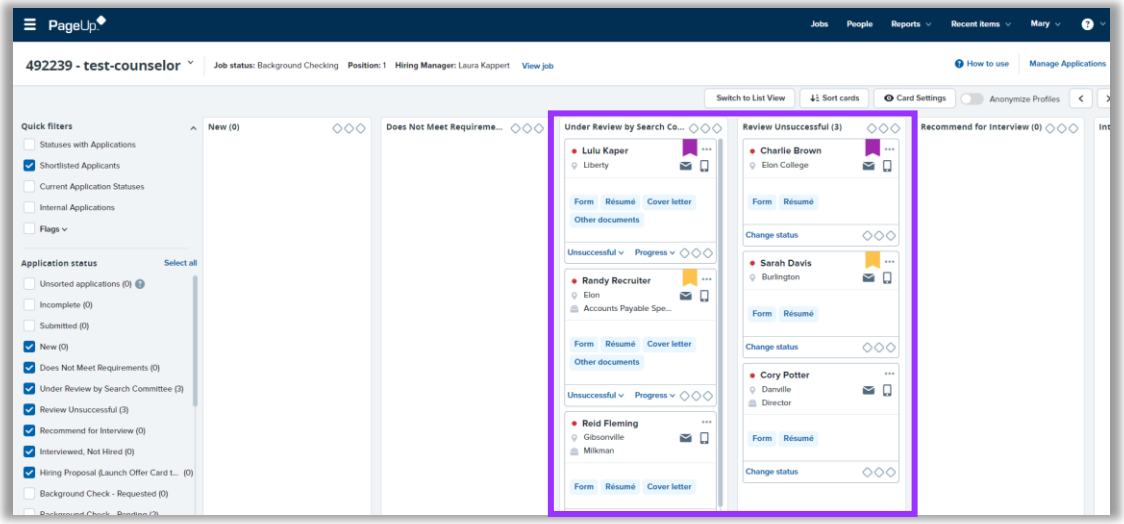


- From the **My Dashboard** screen, click on **Review Applications** (blue text) within the **Applicant Progress Board** tile.

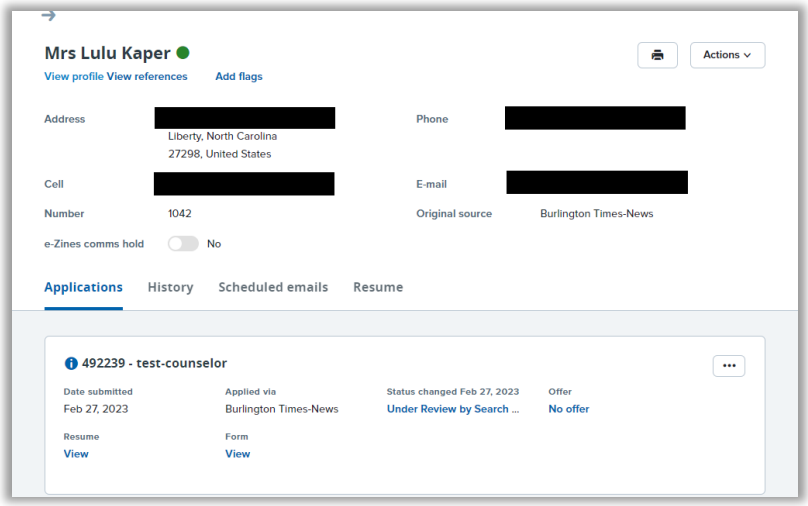


OR

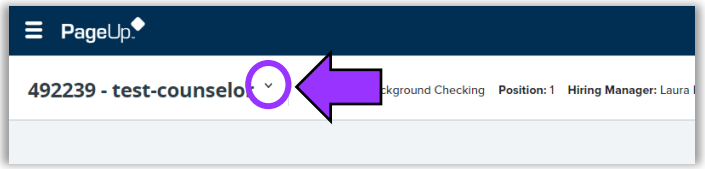
- From the Side Menu, select **Manage Applications** to view the last job you were working in.
  1. In the **Applicant Progress Board** view, you can see all the applicants for a specific position, along with the status category that each applicant is current in.



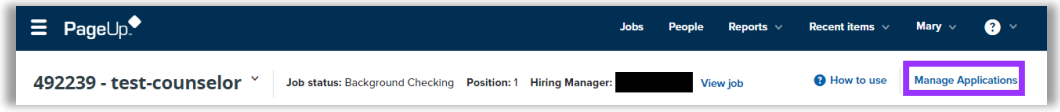
- You can click on an applicant's name to open a screen to view details about the applicant including any applications on file, view the resume or the application form, or view the history of actions.



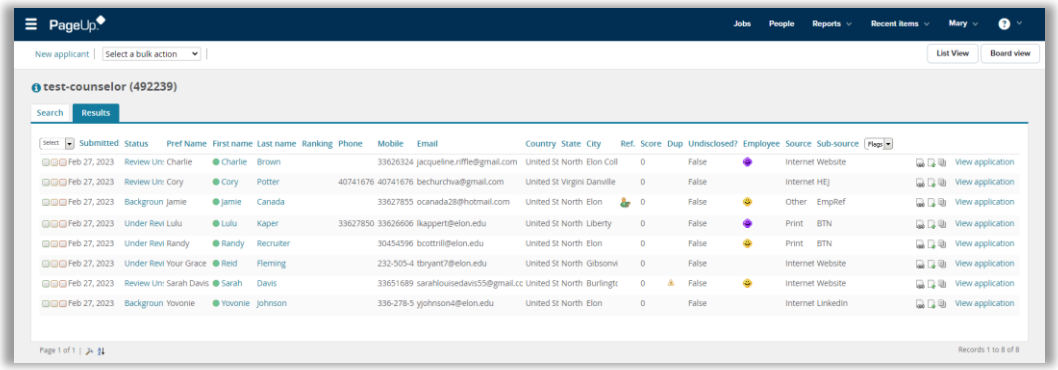
- If you want to view the applicants for another position for which you are responsible, you can click on the dropdown arrow beside the job title in the upper left corner of the screen to switch to that position.



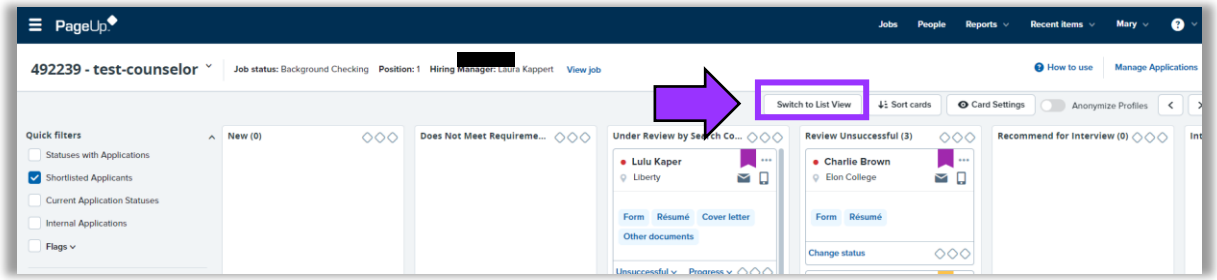
- You can choose to click on **Manage Applications** (blue text) in the upper right on the screen.



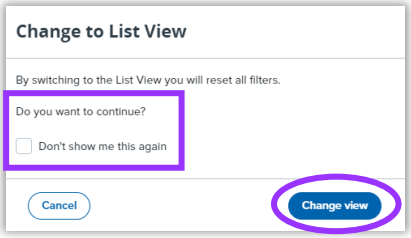
This brings up a list of all the applicants for that position.



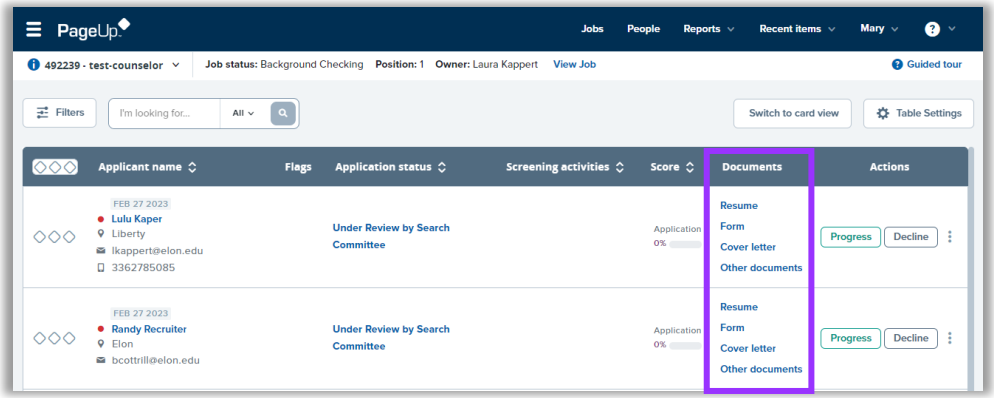
2. As an alternate view, you can switch to **List View** from within the **Card View** by clicking on **Switch to List View** button.



- 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.



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

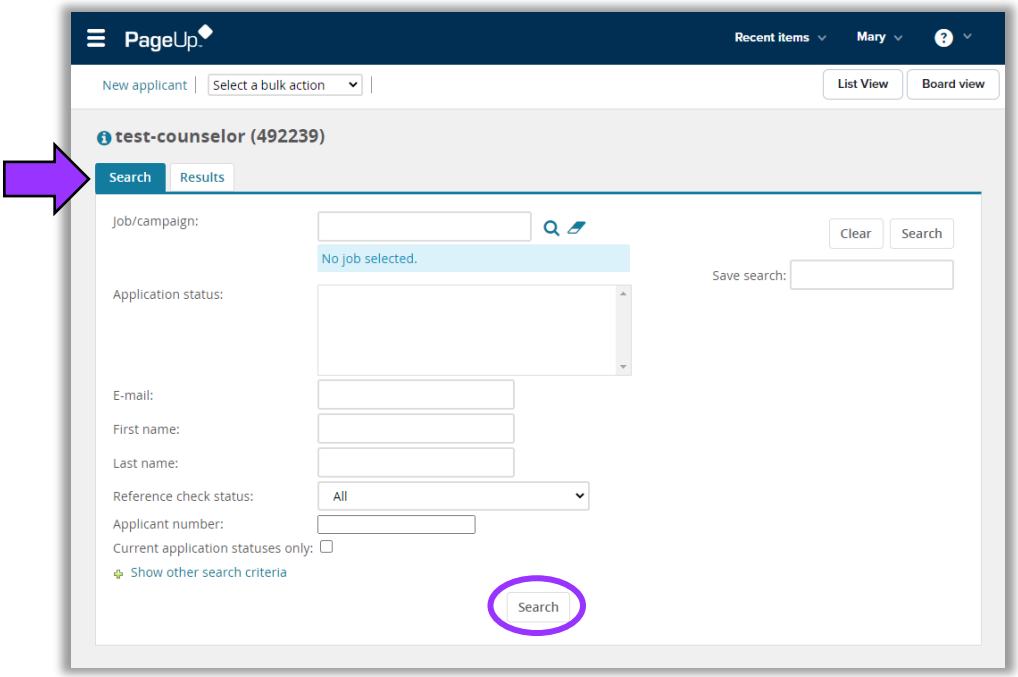


View an Applicant Card

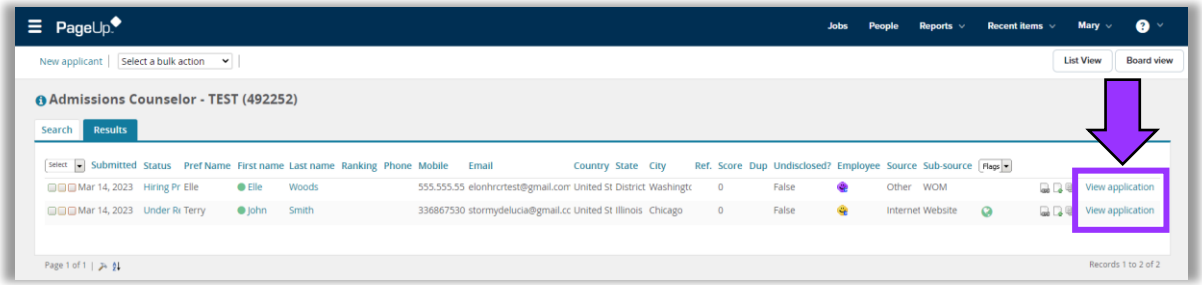
Hiring Managers have access to view the applicant card which includes the applicant's personal details, job application information, previous history and communications, resumes and application forms, etc.

To choose an applicant in the system:

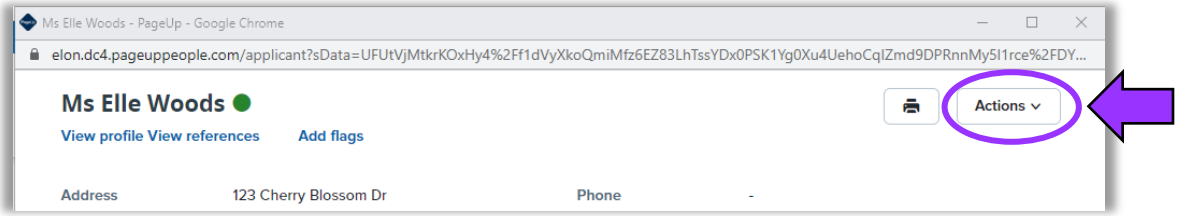
1. Go to **Manage applications** in the left Side Menu.
2. Search for the job and view your applicants.



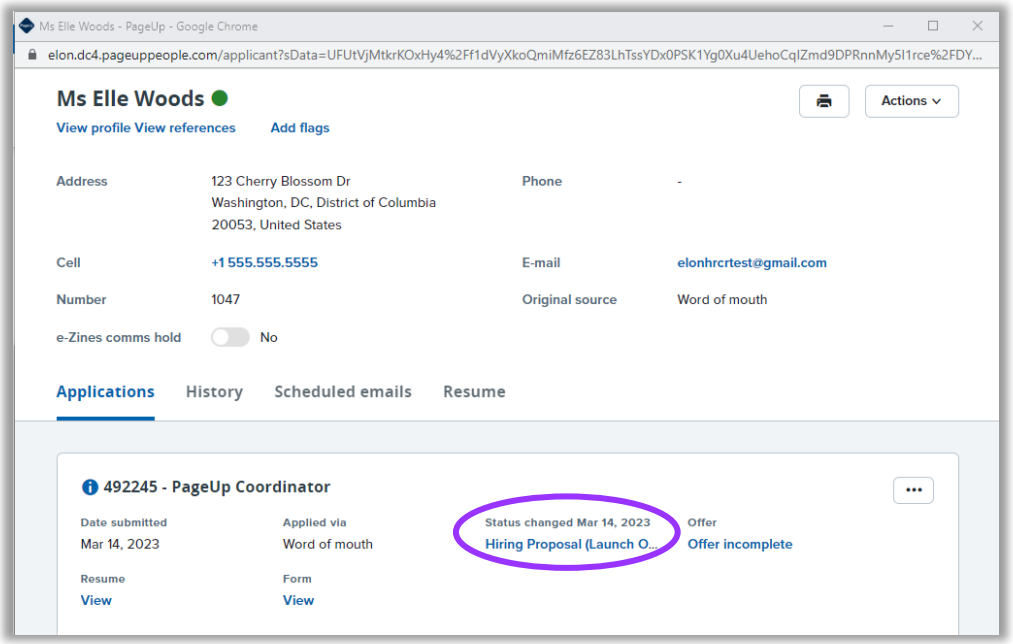
3. Click **View Application** (blue text) to the right of the applicant to see the applicant card.



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**.



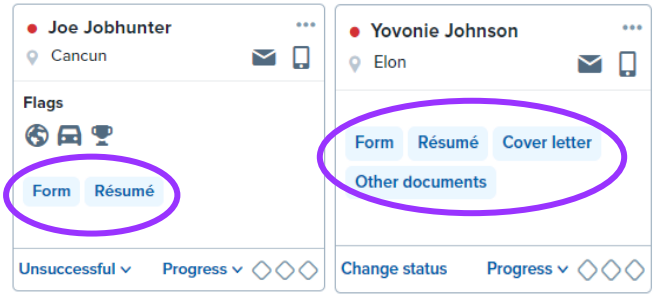
6. The **Status** lets the reviewer know where in the recruitment process an applicant stands. This may include interviews in process, designation of the success or rejection of an applicant, and recommendation for hire.



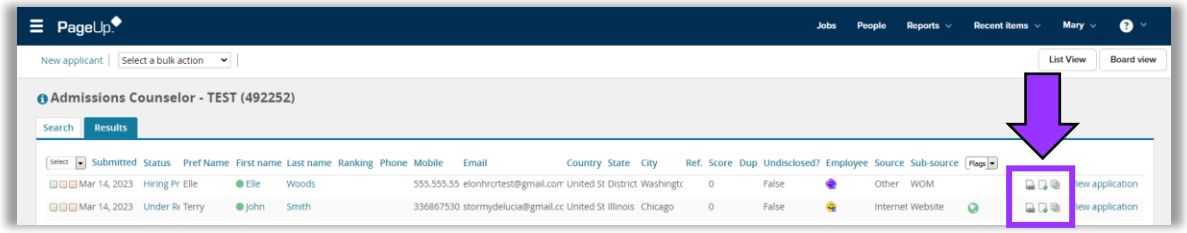
View an Applicant's Resume and Application Form

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.

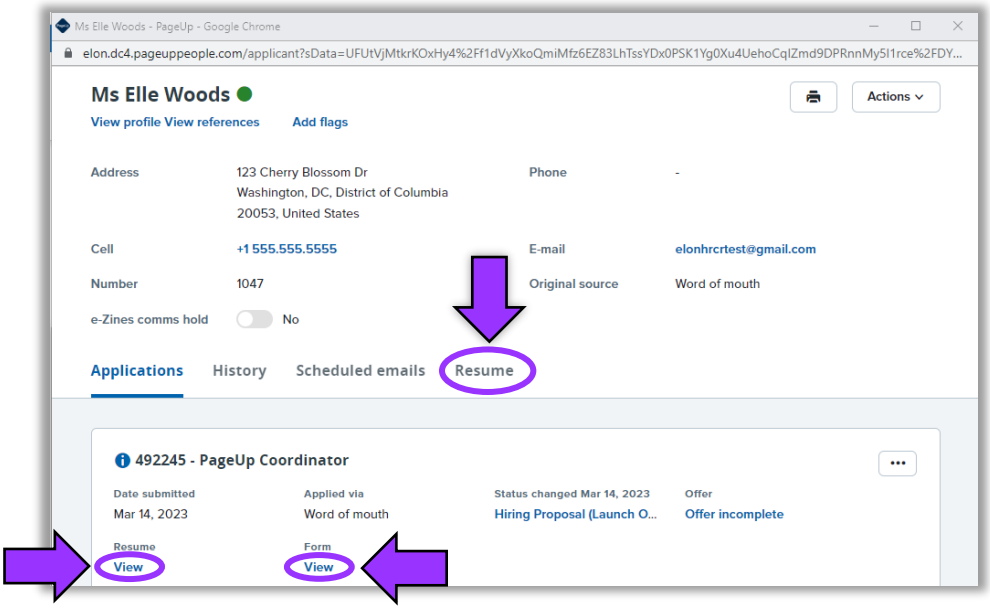
1. From the **Board View** or **Card View**, click on the blue **Form** button or the blue **Resume** button. Any other submitted documents can be view here, as well.



2. From the **Manage Applications** screen, click on one of the options to the right of an applicant to:
   View Resume Download Resume View Form Answers



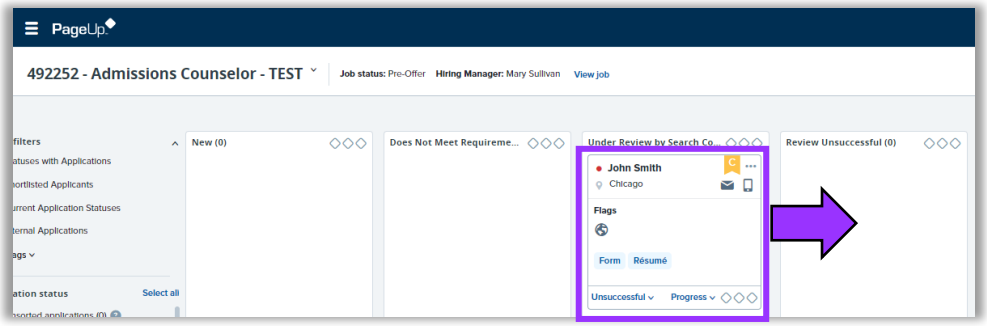
3. From an **Applicant Card** (see section VIEW AN APPLICANT CARD), the resume and form can be viewed by:
   1) clicking on the word **Resume** to the right of **Scheduled emails**, or
   2) clicking on **View** (blue word) under the word 'Resume' under the specific position applied to, or
   3) clicking on **View** (blue word) under the word 'Form' under the specific position applied to.



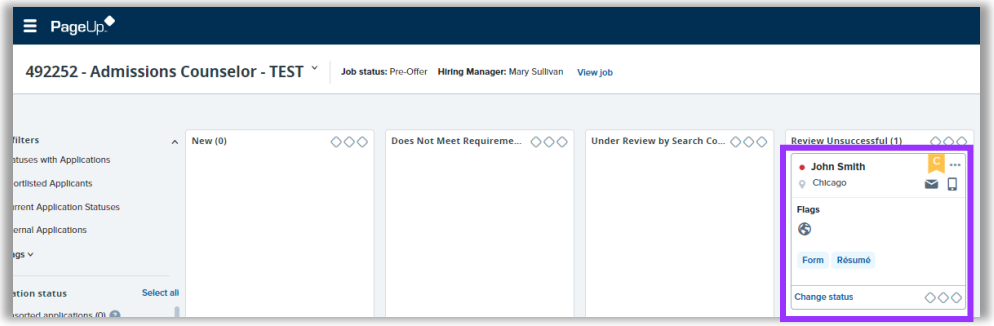
Change the Applicant Status

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.

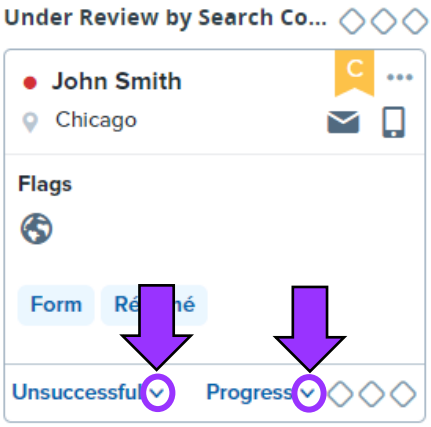
1. From the **Board View** of a position (see NAVIGATE TO THE APPLICANTS section), you can:
    1. **Drag** (hold left mouse button down while hovering over an applicant's card) **and drop** the applicant from one column to another, based on the column headings – which represent the possible **statuses**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



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



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

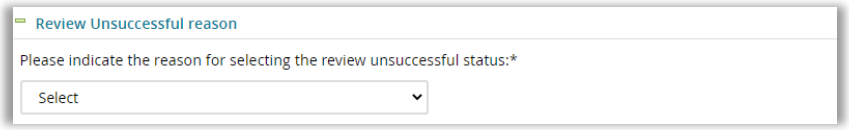


Unsuccessful Statuses to choose from:

Review Unsuccessful – 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)



The choices in the dropdown are:

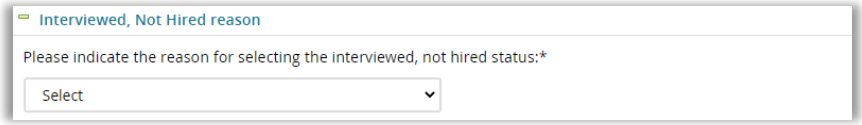
- Accepted another offer
- Personal reasons
- Company benefits unsatisfactory
- Compensation unsatisfactory
- Unable to relocate
- Staying with current employer
- Does not meet position requirements
- Did not fit with company culture
- Other candidates more suitable
- Background / Reference check requirements 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)



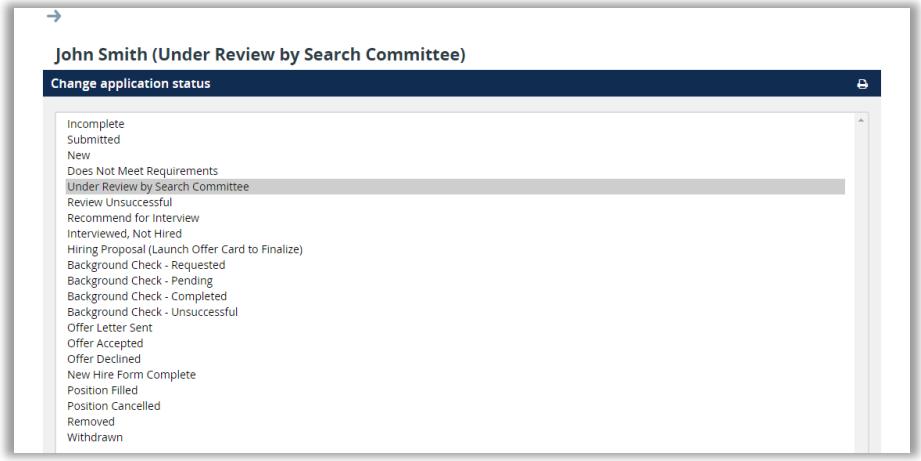
The choices in the dropdown are:

- 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

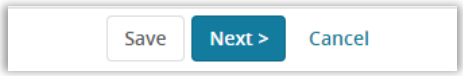
4. an area for a **Note**
5. an option at the bottom to **Move Now** (blue button) or **Cancel.**

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.



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:

Recommend for Interview – This status will progress the applicant forward in the process.

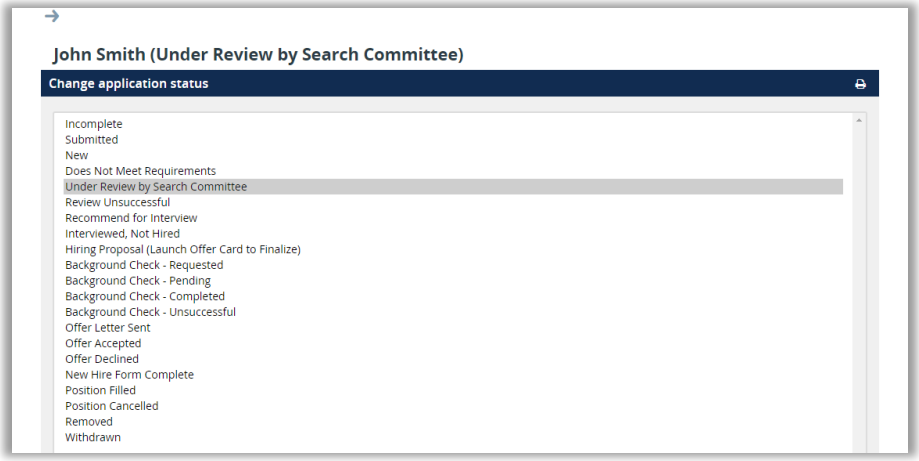
1. A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (defaulted to No).
2. At the bottom, click **Move Now** (blue button) or **Cancel.**

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

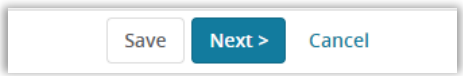
1. A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (defaulted to No).
2. At the bottom, click **Move Now** (blue button) or **Cancel.**

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.



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).

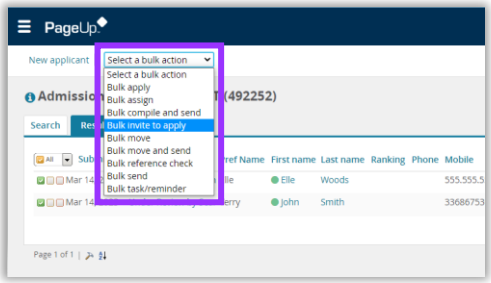


3. A **Confirm Status Change** screen will appear. Follow the required prompts to confirm the change.
4. Click the **Move Now** button.

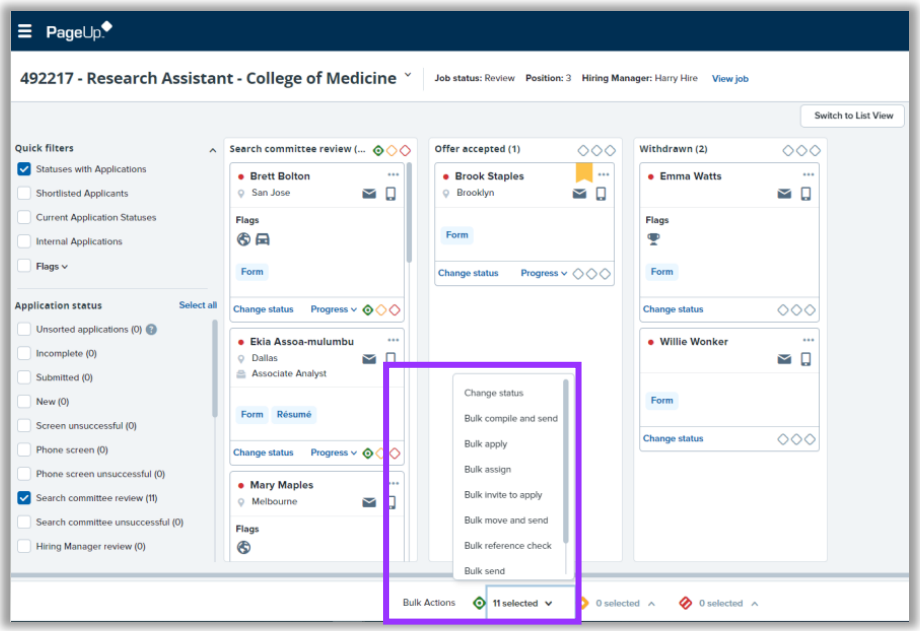
Manage Applicants - Bulk Actions

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.

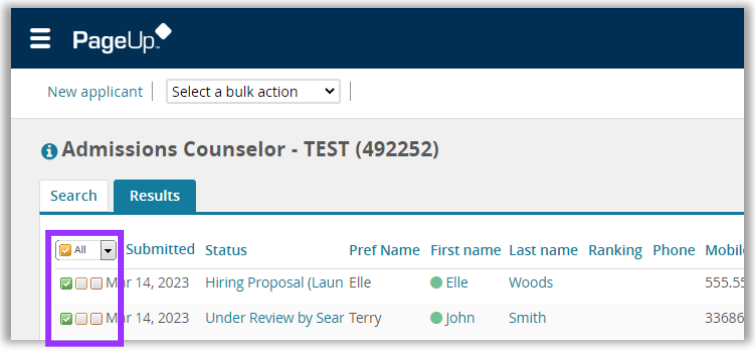


b) Selecting multiple applicants on the **Applicant Progress Board** and then selecting a bulk action from the choices.

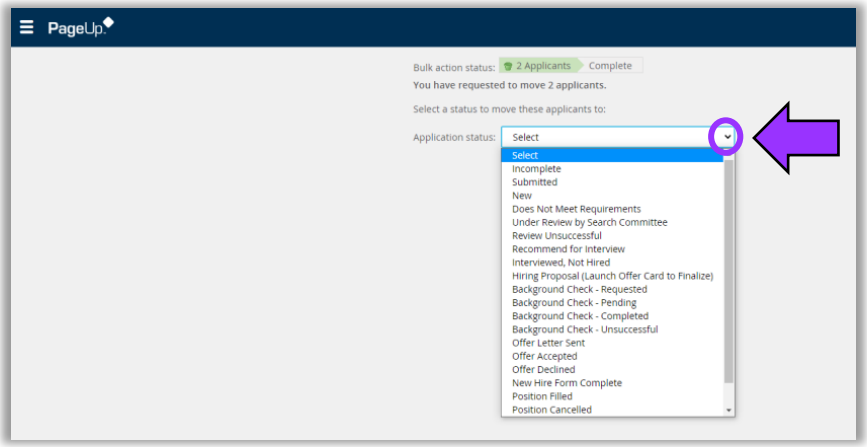


Bulk Change Status

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.



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.



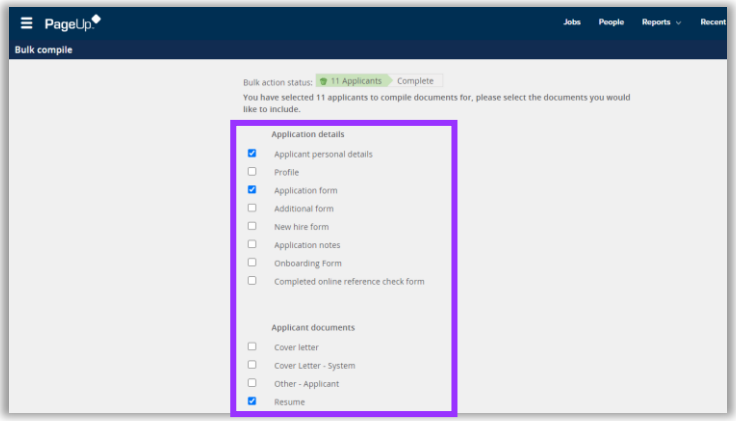
5. From the dropdown list, select a new status that you wish to move the selected applicants to.
6. Click the **Next** button.
7. A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (Please make sure the correct decision for communication 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.

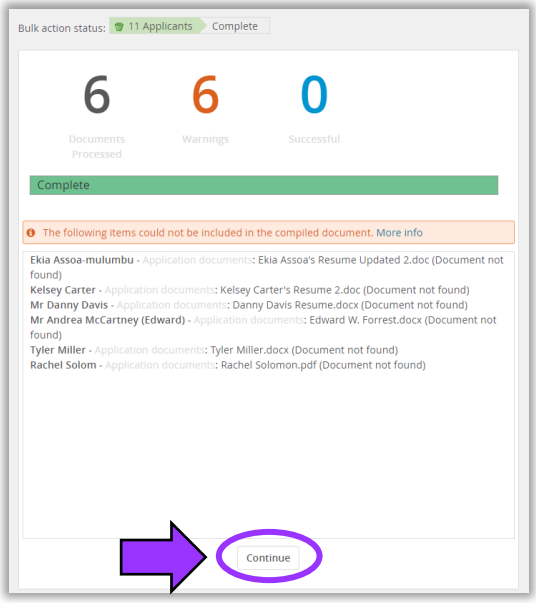
1. Use either method a) Selecting **Manage Applications** on the Side Menu, or b) Selecting multiple applicants on the **Applicant Progress Board** and then select **Bulk Compile and Send** from the choices.
2. A screen appears letting you know the number of applicants you have selected. Check to be 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.



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.



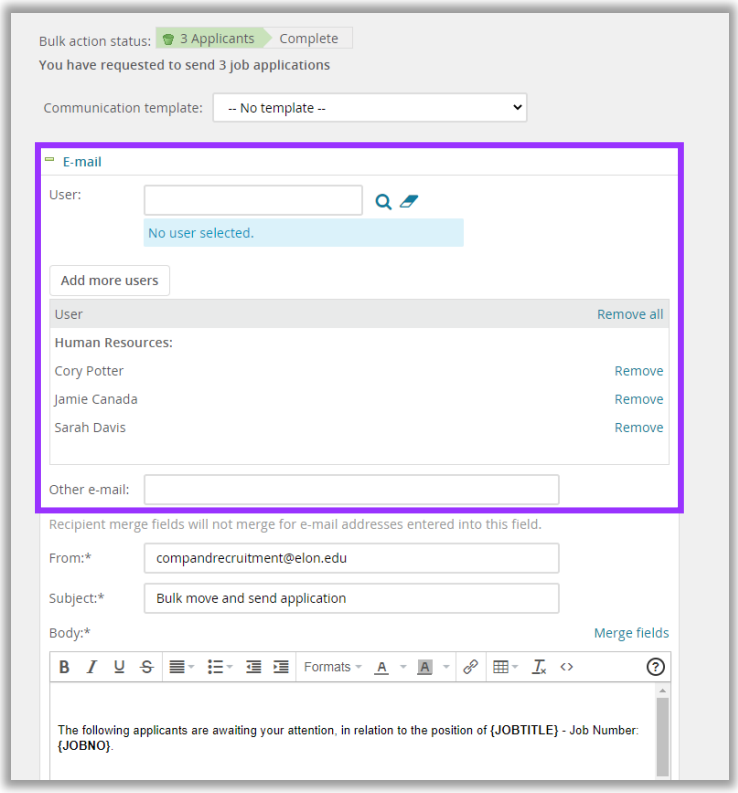
7. A new screen appears with the ability to email the PDF to the system users and others you select. The screen also provides instructions on how to download and save the document. ("To download the document, right click on the link below and select 'Save Target As'. Note: To send the document it is 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.

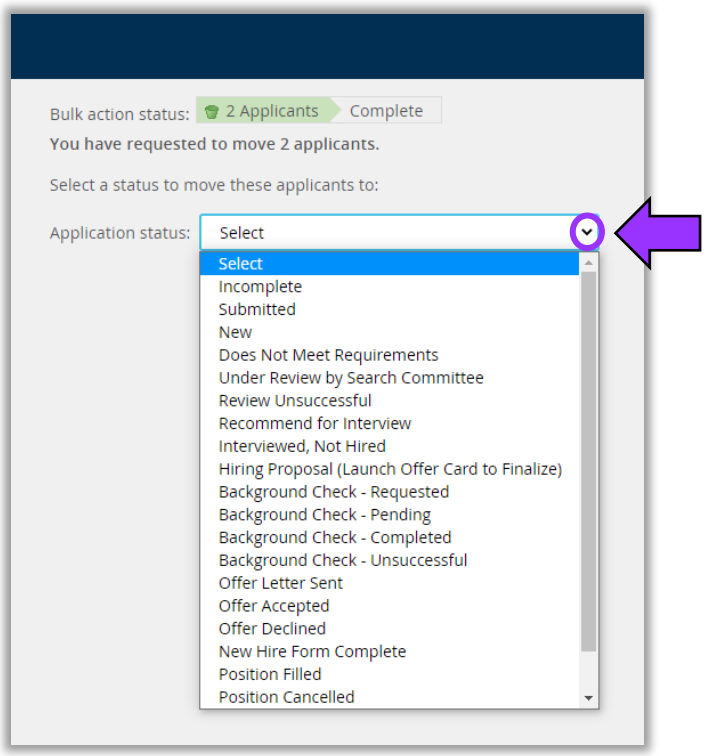
Bulk Move and Send

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.

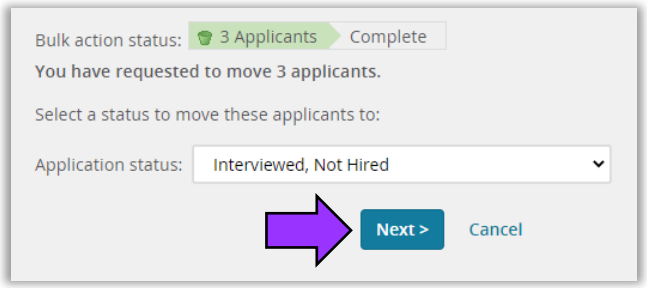
1. Use either method a) Selecting **Manage Applications** on the Side Menu, or b) Selecting multiple applicants on the **Applicant Progress Board** and then select **Bulk Move and Send** from the choices.
2. A pop-up screen appears for sending an email. Check to be sure it is being sent to the correct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



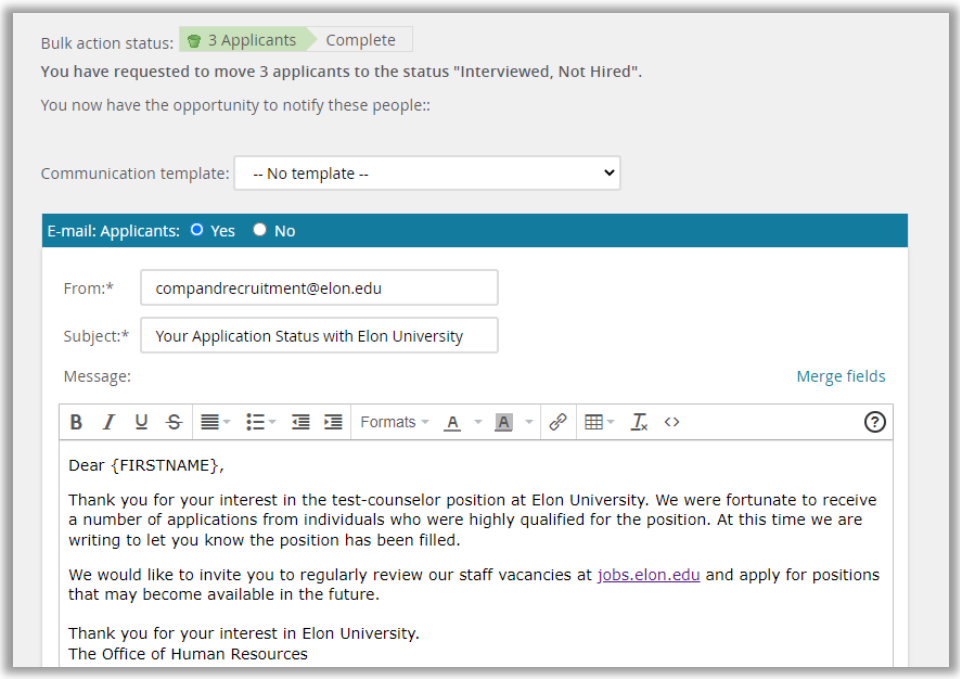
3. Scroll to the bottom and click the **Next** button.
4. On the next screen, click on the dropdown arrow beside the **Application Status** field.



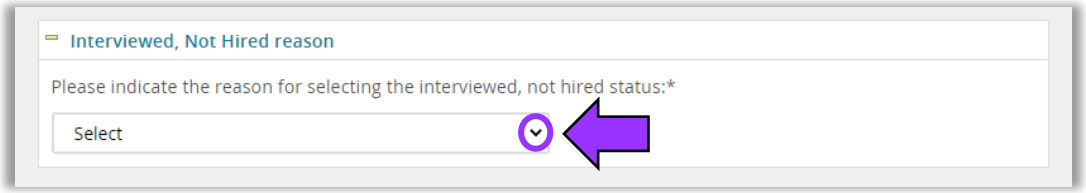
5. From the dropdown list, select a new status that you wish to move the selected applicants to. Then click the **Next** button.

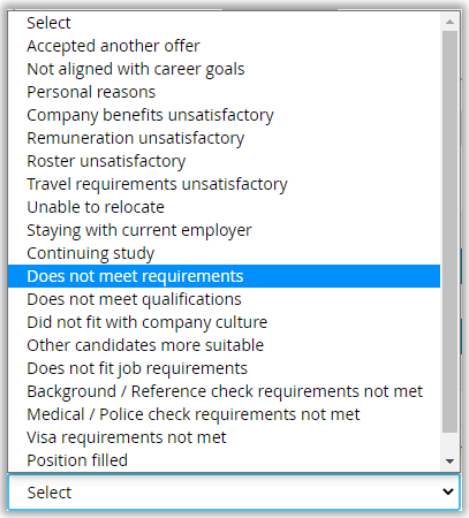


6. A new screen appears to give you the opportunity to notify the applicants of your decision. Check over the details of the email.



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





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

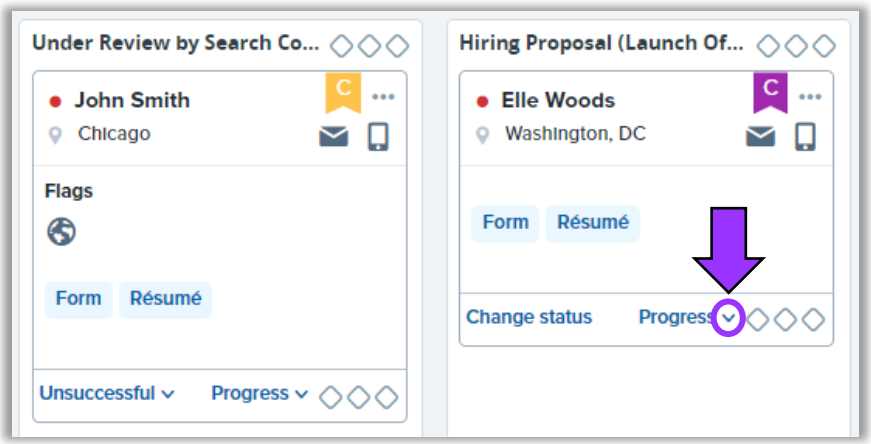
Create the Hiring Proposal

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.

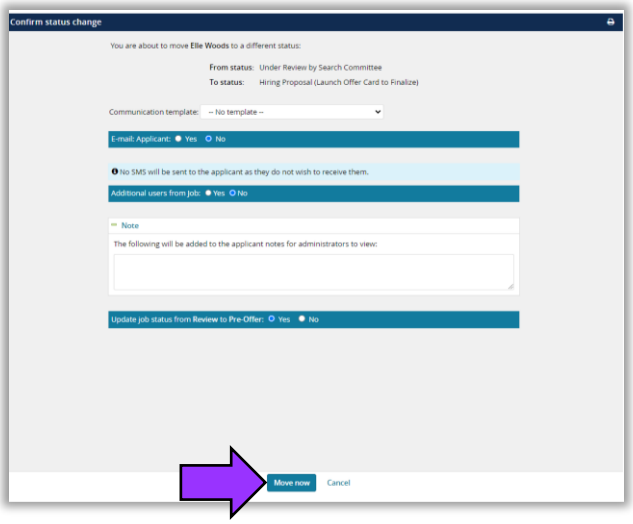
or

2.) Move the selected candidate by using the dropdown feature on the applicant card.

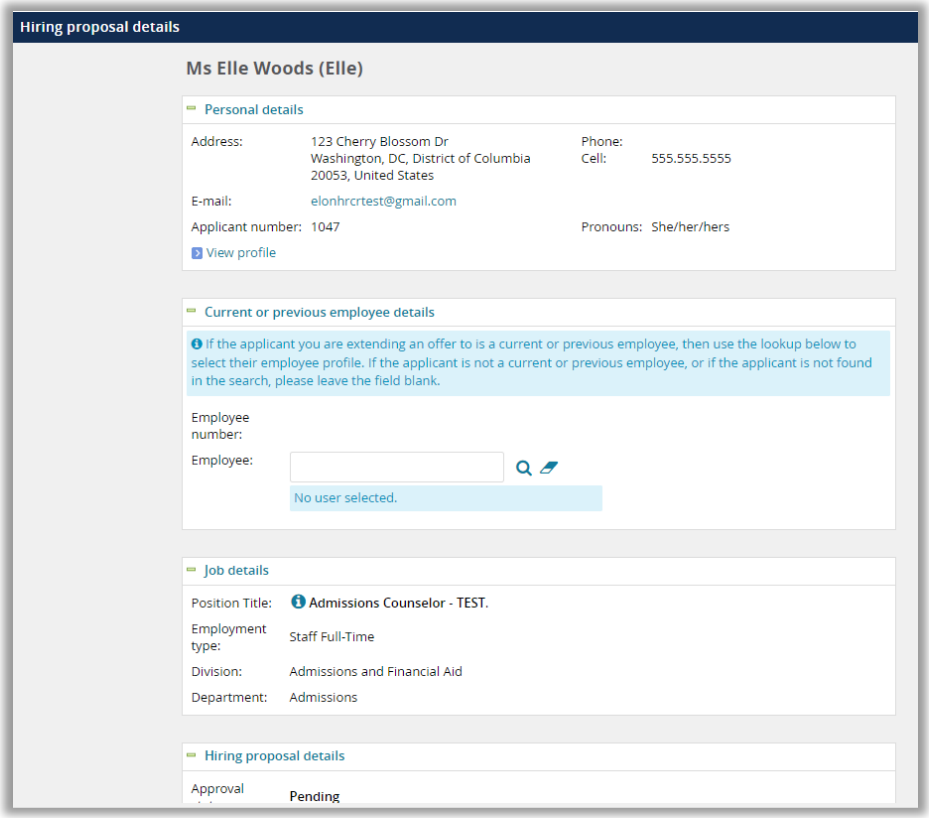


3.) A screen appears to **Confirm Status Change** prompting a communication to the applicant informing the person of your decision (defaulted to No).

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.

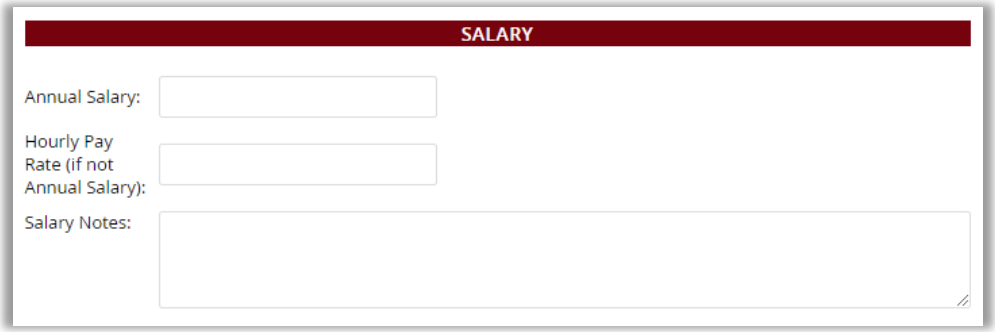


5.) The Hiring Proposal form will automatically appear with many details pre-filled using the selected applicant's profile information and associated job information.

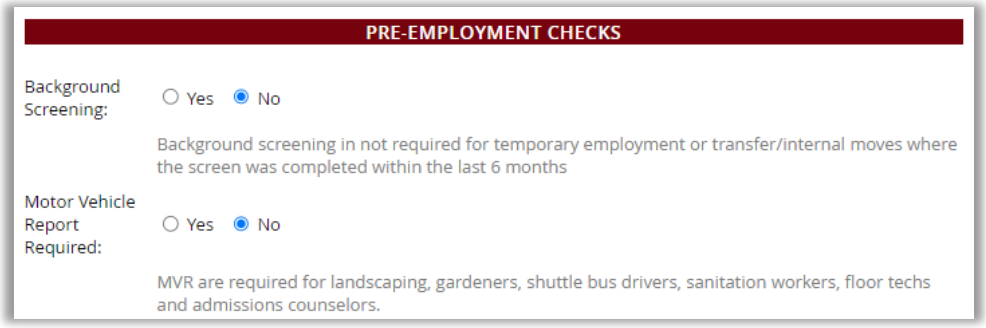


6.) Complete the applicable fields with the requested information. Please note, staff positions are not required to provide any information requested under the "**Faculty Only**" section.

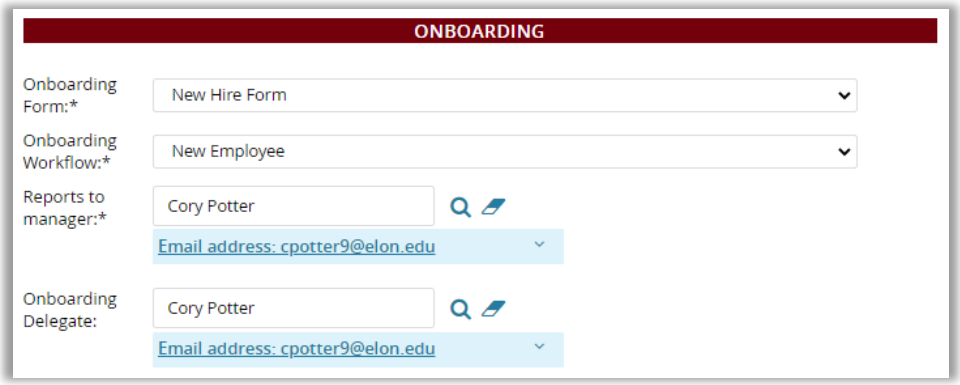
Important Note: Please use the appropriate salary field within the hiring proposal based on if the position is paid an annual salary or an hourly rate. This step is crucial so that the correct salary amount is provided in the Offer Letter.



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.



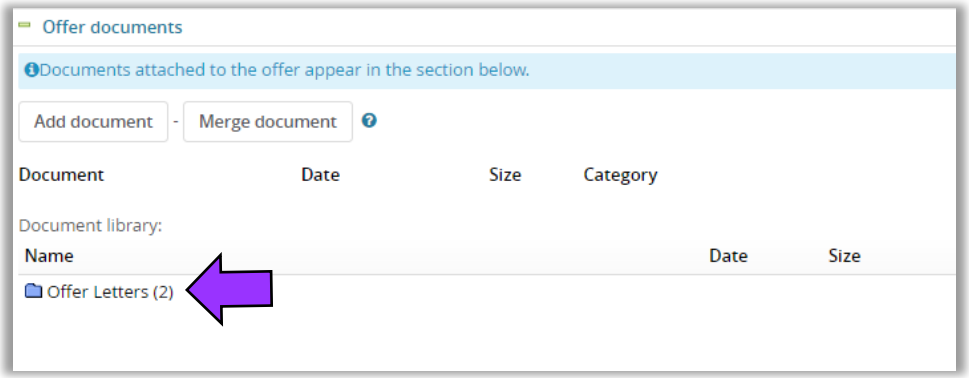
New Employee – select this workflow if the candidate is a new external hire into a permanent position that will require access to all new employee materials, such as benefits enrollment forms

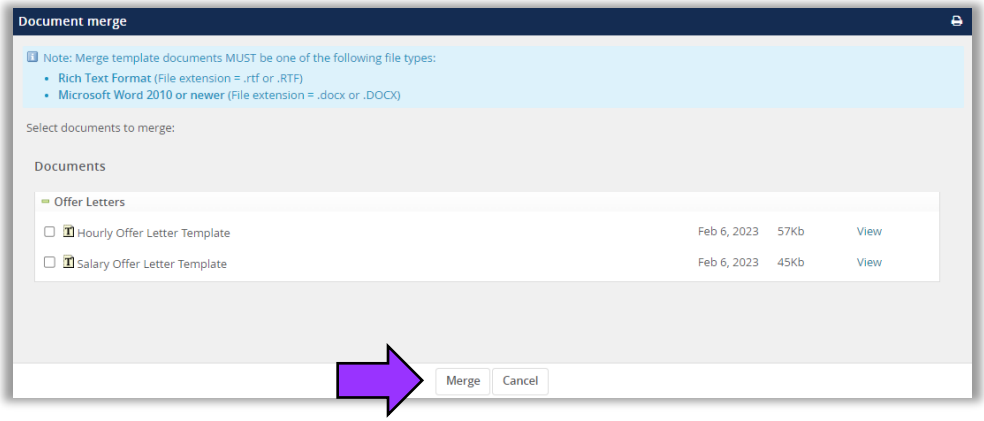
No Onboarding – select this workflow if the candidate is a current employee and internal hire

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 DO NOT 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.)



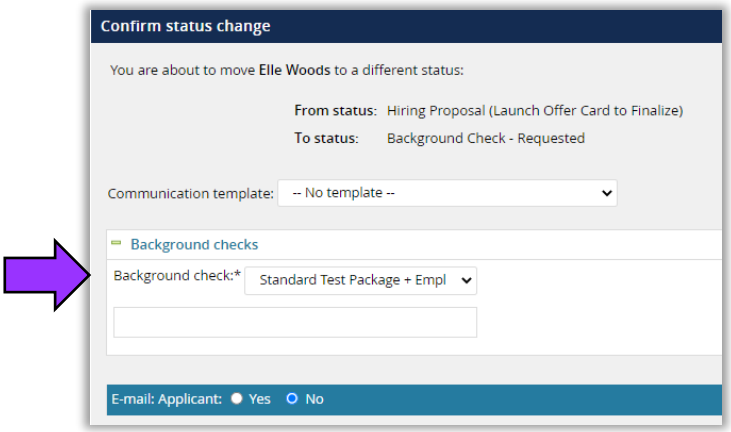


11.) Under the **Approval Progress** section, select the appropriate approval workflow for the hiring proposal and select **Save**.

Background Check Process

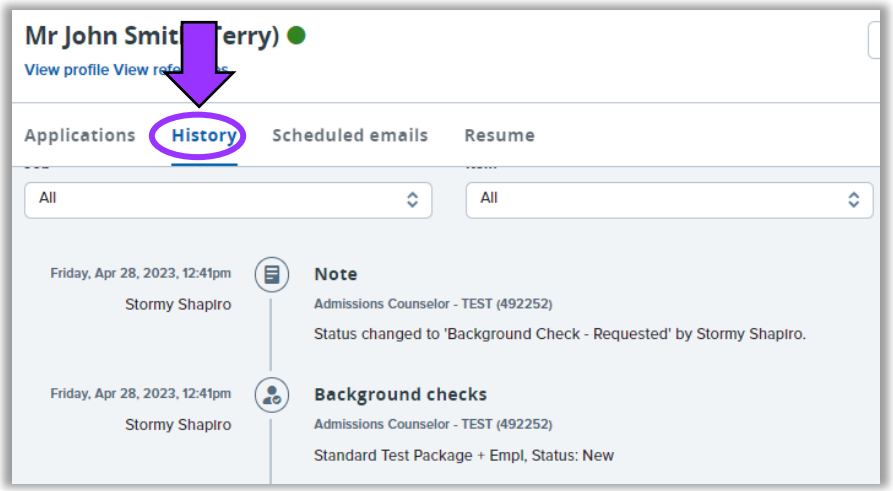
Once the approval process for the Hiring Proposal has been completed and all approvals have been received, the Hiring Manager will receive a system notification. Upon receiving approval, please submit the new employee for a background check by performing the following:

1) 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.



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.

3.) 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.

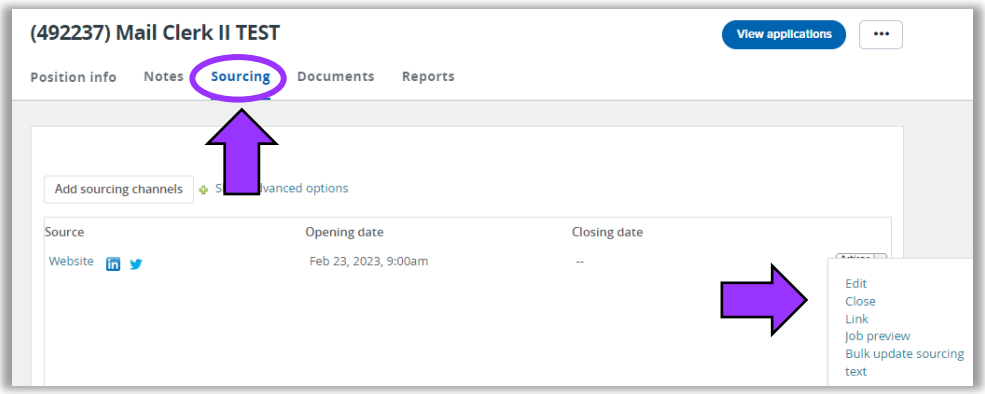
NOTES:

- 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**.



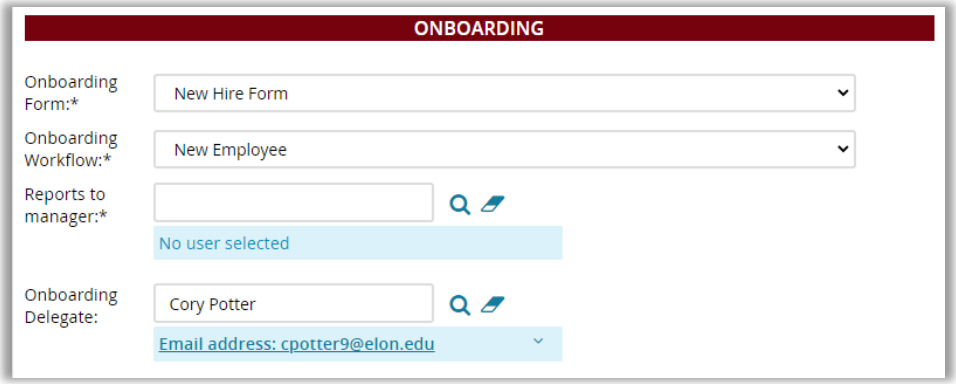
3) You will be asked to confirm that you want to close the position. Click **OK**.

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

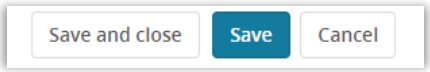
ONBOARDING WORKFLOW (*) – You have three options to choose from for STAFF onboarding:

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 (🔍) 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 (🔍) 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.

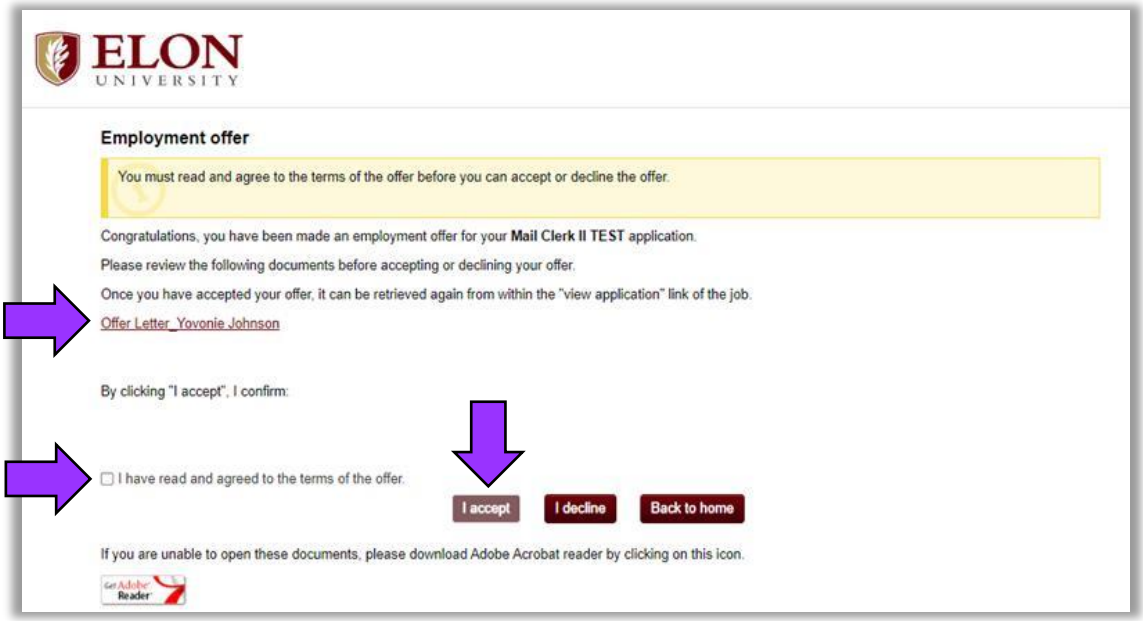


Manage the Onboarding Process

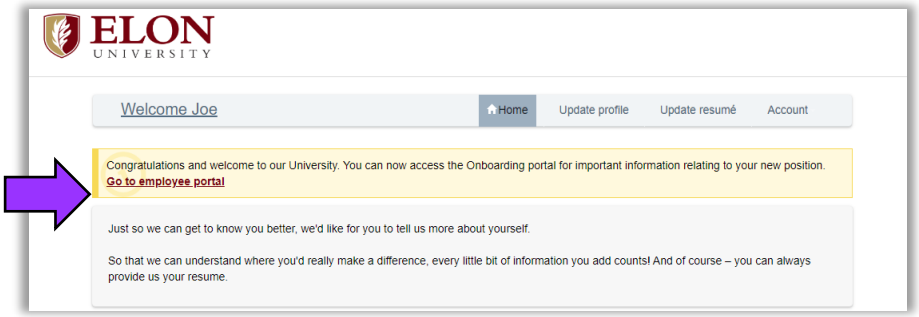
Employee Access to Onboarding

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.



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



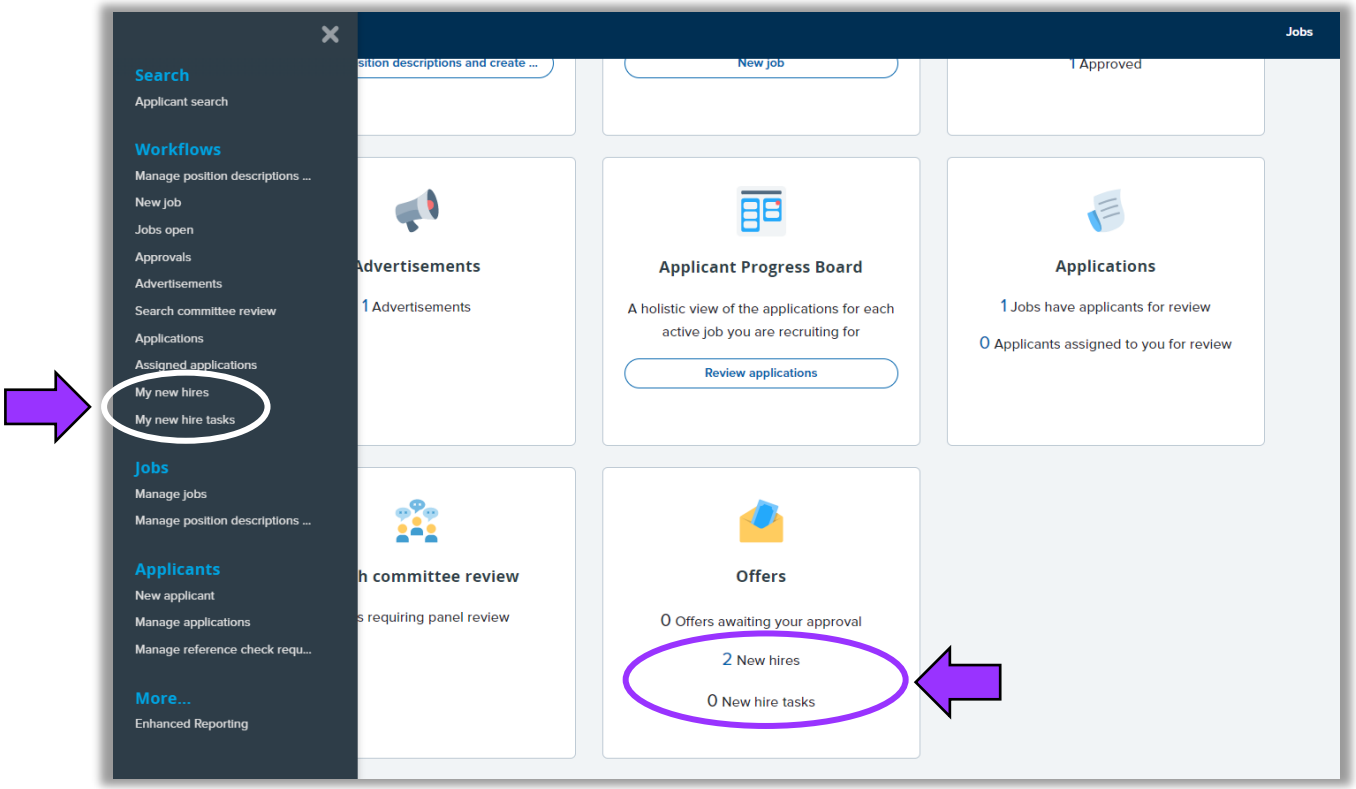
Within the Employee Portal, the new employee will see the assigned onboarding tasks categorized as:

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:

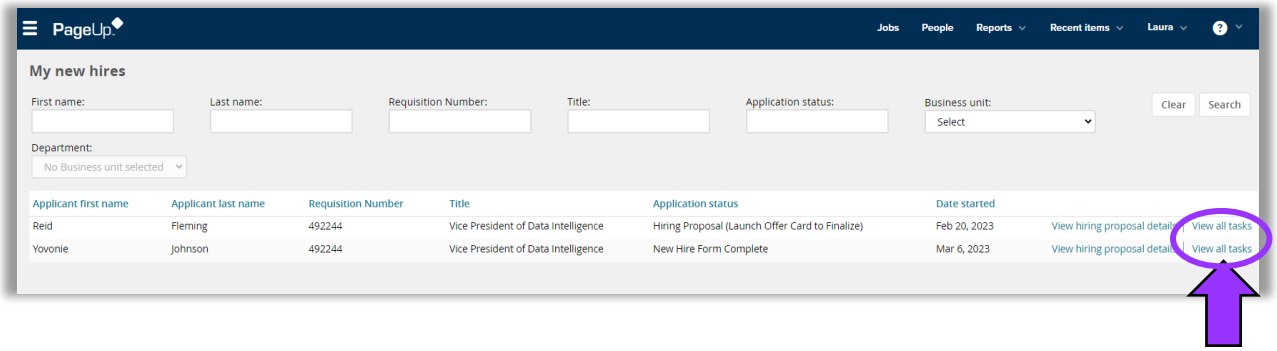
1. From the Side Menu, select **My New Hires** or **My New Hire Tasks** (under **Workflows** section).
2. New hire tasks can also be viewed from the **Offers** tile by clicking on **New Hire Tasks** or **New Hires** (and then **View All Tasks).**



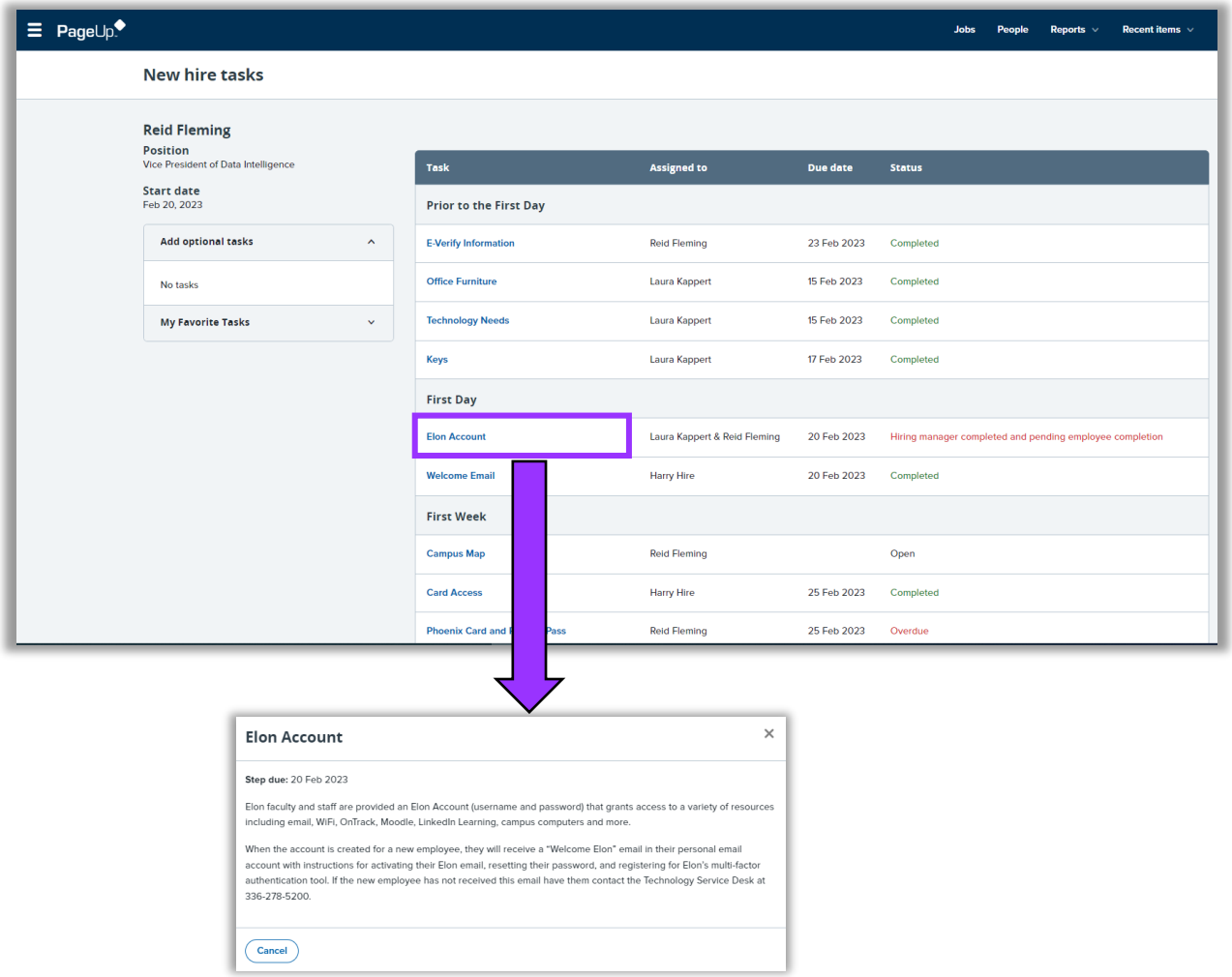
My New Hires Navigation

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

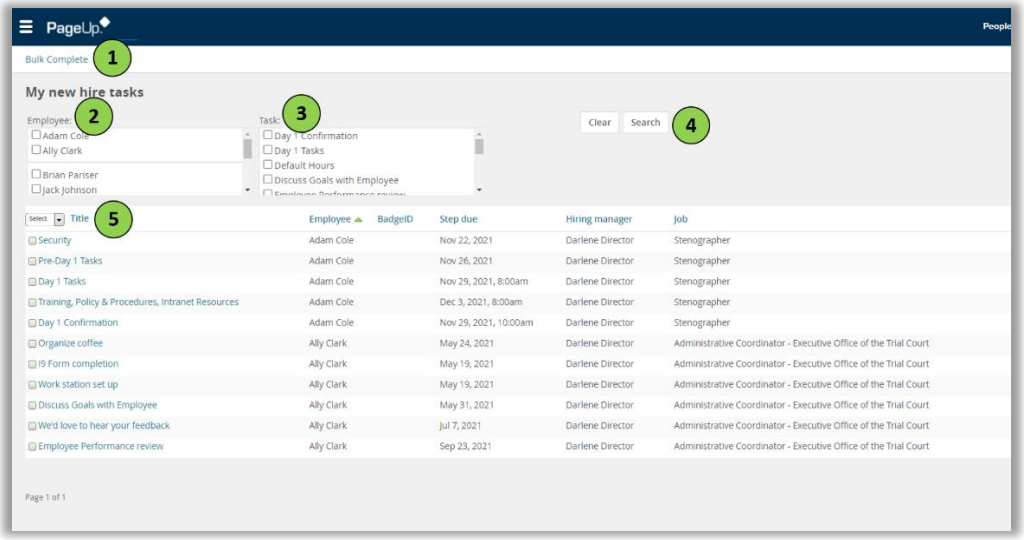


Click on the task name to open a pop-up window with the task description.



My New Hire Tasks Page Navigation

See the corresponding descriptions below for each numbered item.

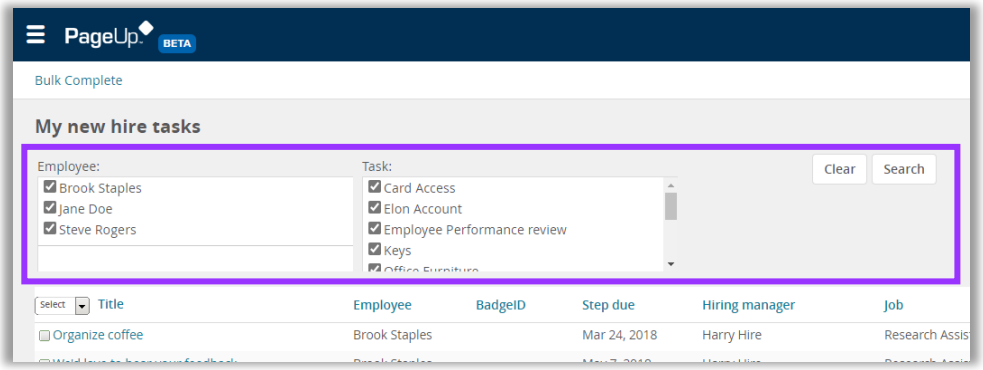


1. **Bulk Complete**: Ability to check assigned tasks and mark as completed.
2. **Employee Filter**: Ability to filter tasks by the employee.
3. **Task Filter**: Ability to filter tasks by the task.
4. **Filter Search/Clear**: Initiate or clear any filters. Note – Any filters previously in place will 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

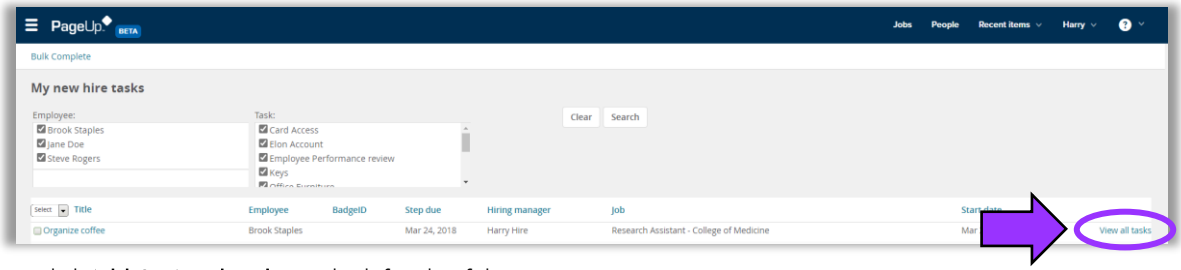
Assigning Additional Onboarding Tasks

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

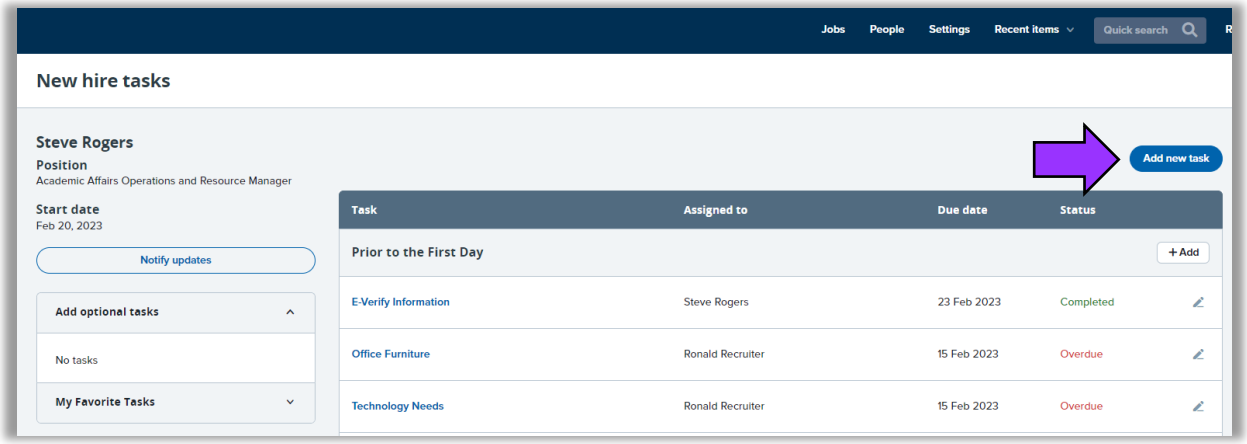
1. Navigate to the **My New Hire Tasks** using the side menu.
2. Search for the specific employee(s) using the search function.



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

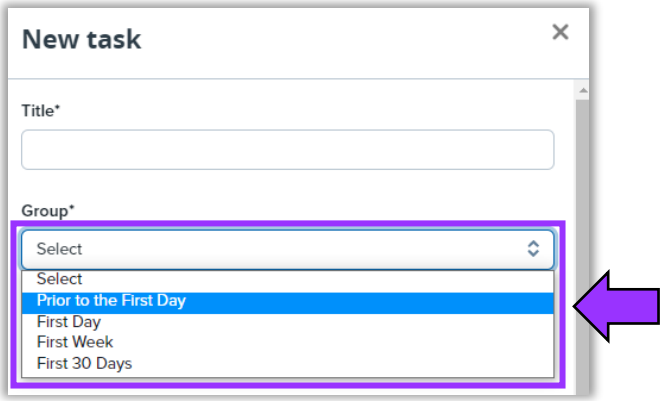


4. Click **Add Optional Tasks** on the left side of the screen.

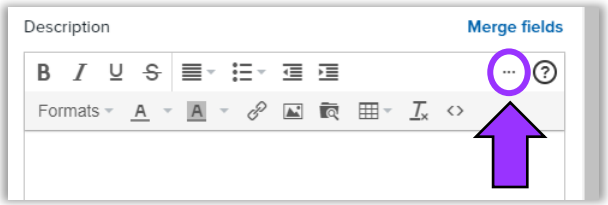


5. A **New Task** pop-up window will appear.
6. Add a required **Title** to the new onboarding task (e.g., FERPA Training).

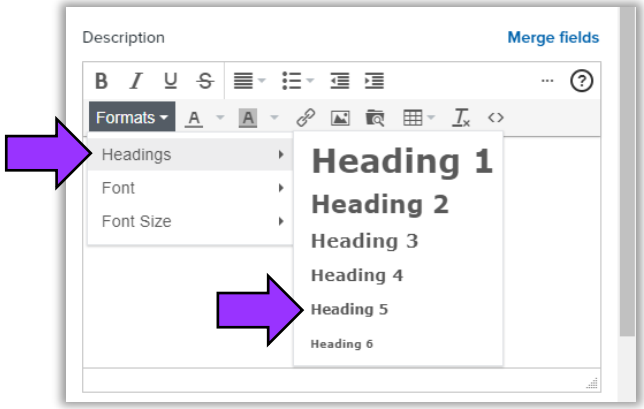
7. Select the required **Group** from the dropdown list depending on when you wish for the new employee to complete the task: Prior to the First Day, First Day, First Week, or First 30 Days.



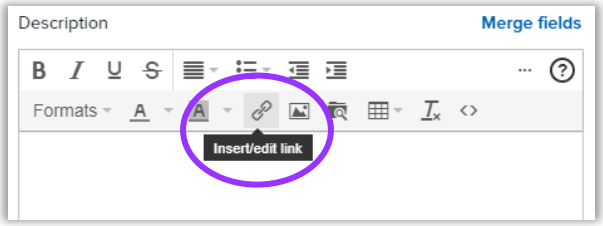
8. If known, enter a **Due Date** and a **Due Time.**
9. Enter the task **Description** in the text box. You can click on the three dots (ellipsis) to expand the toolbar.



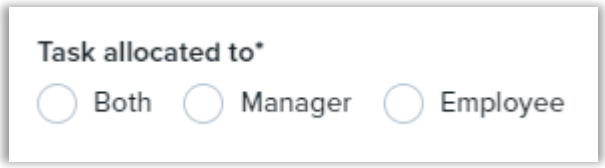
10. To be consistent with the pre-loaded onboarding tasks, you can add title within the task description textbox using Heading 5.
    a. First, type the title in the text box.
    b. Highlight the title.
    c. Go to Formats >> Headings >> Heading 5



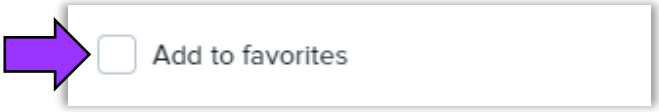
11. You have the option to hyperlink text in the task.



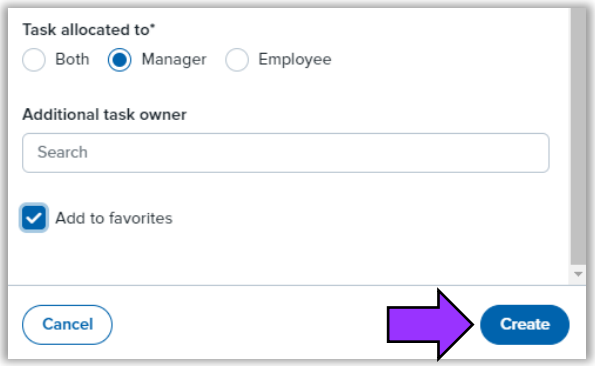
12. Next, you assign the task to both the manager and employee, the manager, or the employee by clicking on the appropriate radio button. "**Task allocated to**" is a required field.



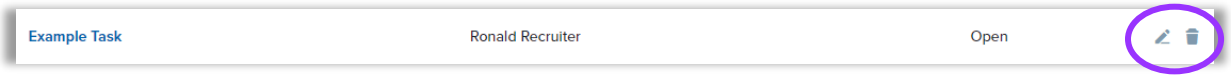
13. (Optional) If you will be using the onboarding task on a regular basis, check the box next to **Add to favorites.**



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

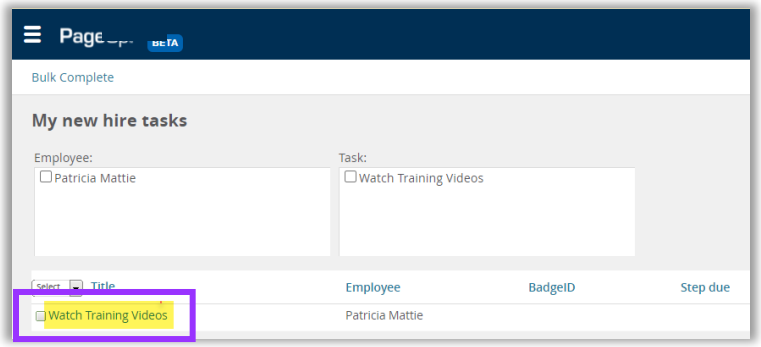
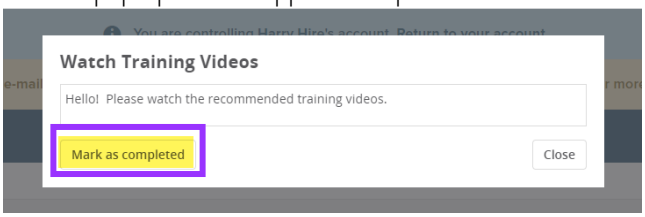


15. Clicking the Create button closes the window. The new task now appears on the **New Hire Tasks** screen in the **Group** that you assigned it to. Notice that the added onboarding task has icons for editing and deleting the task on the right side of the screen.



Complete and Close Assigned Tasks

1. Click on the title of the applicable task.



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