



PeopleAdmin (PA7)

[Instructional Materials]

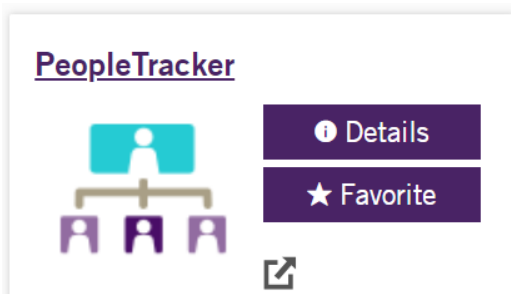
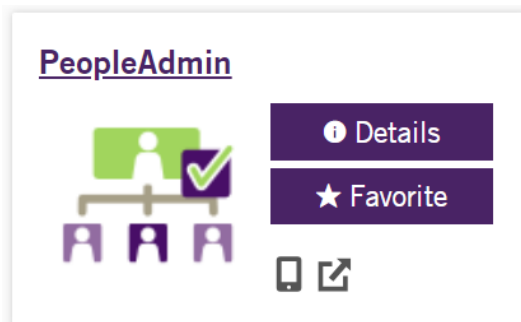
Creating Position Descriptions

Log into the e-weber portal

Type "PeopleAdmin:" in the search bar. Both icons below will appear. "People Tracker" is the old (5.8) version. Performance Reviews (PREP) will still be done in PeopleTracker until further notice.

Note: Bookmarks need to be updated, as well as links and quicklinks posted on other sites and correspondence.

PeopleAdmin (PA7) is the replacement system for PeopleTracker. It is fully operational for creating Position Descriptions, Job Postings and Searches. These instructions are designed to help with the transition. Click on the PeopleAdmin app to begin.

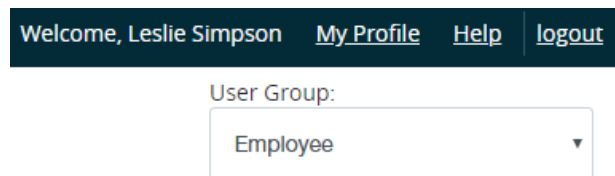


It will open to the **HOME PAGE**:

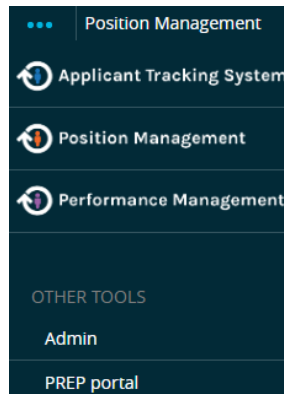
- Be sure you are in the correct user type for the action you are taking (i.e. Supervisor to Create, Modify, and Audit a position description).
- Required fields are noted by an Asterisk.
- ORANGE bar at the top of the screen indicates you are in the position descriptions module (POSITIONS).
- BLUE bar at the top of the screen indicates you are in the job postings module (HIRE).
- The “Next” button at the bottom of each page automatically saves your key strokes. However, if you come back to a completed page and make changes, you must hit the SAVE button before NEXT.

NEW Position Description

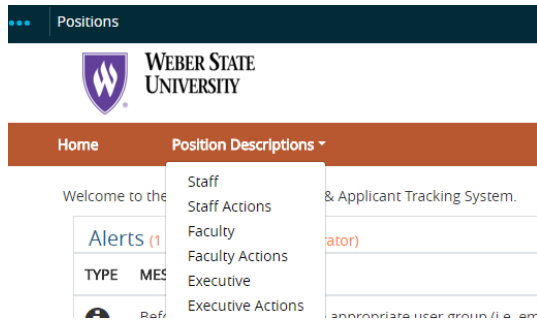
Click on the dropdown “User Group” menu located in the upper right corner and select correct user type—Supervisor.



Click on the three light blue dots in the upper left corner and select “Position Management.” The top banner will turn from blue to orange.



Next, select the “Position Description” Tab on the menu bar in the upper middle portion of the screen. A dropdown menu will appear. Select the type of position you want to create: Staff, Faculty or Executive.



Click on Create New Position Description.



Type the name of the position in the space next to “Working Title.” The Organizational Unit will pre-populate to your assigned Division, Business Unit and Department. (There are some exceptions. If you have questions call HR). Click on the “Start Action” button in the upper right corner of the screen.



POSITION DETAILS:

Notes:

- The check list on the upper left side of the screen tracks the entire progress. (See image below)
- In the end, if all check boxes are GREEN then you are good to go. If any items have an orange exclamation point, please click on the item and make the prompted corrections.
- You may use these links to navigate to each page or simply use the Previous and Next buttons on the bottom of each page.
- Remember if you make ANY changes to a page, you must hit SAVE before NEXT.
- After completing all pages, click on “Action Summary” to see all pages at once. You may click the edit link by each area to make additional changes.



JUSTIFICATION:

Follow instructions on the screen to type in the box labeled “Justification” to explain your reason for creating the new position description. Next, scroll down and fill in the orange required boxes and the additional boxes, if needed.

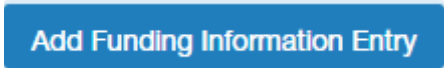
Note: Background checks will be determined by Human Resources.

POSITION INFORMATION:

Scroll down and fill in all required fields and others that are applicable to your description.

FUNDING INFORMATION

Click on the “Add funding Information Entry” at the bottom of the screen to provide the index and org code that will be used to fund this position. **Note:** This information is required.



Index
Org
Percent

Click Save and/or Next when done. **Note:** You may click Add Funding Information Entry to enter additional funding sources. If you inadvertently click on the button and create unnecessary additional fields, click on the Remove Entry checkbox under the entry you wish to remove and hit Save or Next.

PROPOSED JOB DUTIES:

Follow the instructions on the screen to add a minimum of 3 specific job functions/duties and include the estimated percentage of time dedicated to each function. This section is required. When finished click Save and/or Next

CONTEXT AND ENVIRONMENT:

Follow the instructions on the screen and answer all ten required questions. If any box is not applicable, please type N/A in the space provided. Then click Save and/or Next

SUPPLEMENTAL DOCUMENTATION:

Note: Most supervisors will NOT use this page. Human Resources is the primary user.
Click Save and/or Next

BUDGETARY RESPONSIBILITIES:

If the employee is not the named person responsible for a budget, skip this page by hitting Save and/or Next. If they are responsible for monitoring or managing some aspect/s of the budget, but are not the named person responsible, add it as a duty on the Proposed Job Duties tab. Click Save and/or Next

SUPERVISORY RESPONSIBILITIES:

If the employee in the position will supervise others, click the Add Supervised Positions Entry button and add Title, Classification Type and the Number of people in each listed position or position type. Click Save and/or Next

ADA ESSENTIAL JOB FUNTION: (Required)

Follow the instructions for each section and check the appropriate essential functions. If the employee will perform the listed activity even if only occasionally, you must check it. Click Save and/or Next

SEATED EMPLOYEE:

Skip this tab. There will not be a seated employee in a new position description.

SUPERVISORY POSTITION:

Search for the supervisor. Click on Filter these Results. (All supervisors in your area will be available in the search engine). Click on the circle next to the supervisor’s name, then click Save and/or Next

When all areas have a green check mark, roll cursor over the Take Action On Action button on the upper right side of the screen and choose Submit (Move to Human Resources).



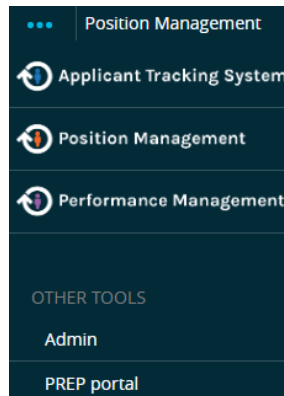
HR will email when the position description has been reviewed and approved. Log back into PeopleAdmin in the e-portal for further action.

CLONE an Existing Position Description

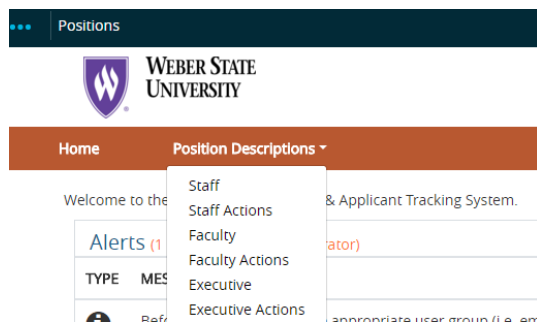
Click on the dropdown “User Group” menu located in the upper right corner and select correct user type—Supervisor.



Click on the three light blue dots in the upper left corner and select Position Management. The top banner will turn from blue to orange.



Next, select the Position Description Tab on the menu bar in the upper middle portion of the screen. A dropdown menu will appear, select the type of position you want to create (i.e. Staff, Faculty or Executive).



Click on Create New Position Description—an orange button on the upper right of your screen.



Scroll down to view the list of all previously created and currently available job descriptions. You may only clone from this list.

Click on the radio button to the left of the title of the position you want to clone. Scroll to the top of the page and click Start Action—orange button. Alternately, you can click on the title of the position and when it opens, click Clone this Position Description in the upper right of the screen under Take Action of this Position Description



The Organizational Unit will pre-populate to the assigned Division, Business Unit and Department.

POSITION DETAILS:

Type why this position is needed in the Justification field. The Position Information and qualifications will pre-populate. Review the information carefully and change as needed. Take note of required fields.

Review the information on each the following pages, hitting Next to advance. If you make any changes to these pages, click SAVE before NEXT.

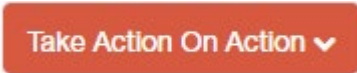
Editing Action
Position Details
✔ Proposed Job Duties
Context and Environment
✔ Supplemental Documenta...
✔ Budgetary Responsibili...
✔ Supervisory Responsibi...
ADA Essential Job Func...
✔ Seated Employee
✔ Supervisory Position
Action Summary

Use this guide in the upper left corner to monitor progress and navigate directly to pages.

ACTION SUMMARY:

Scroll through the summary and make sure all sections contain a green check mark. If any sections have an orange flagged with an orange exclamation mark, click on the [Edit](#) links to make the prompted corrections. Click SAVE and then NEXT.

Once all corrections have been made, hover over the Take Action on Action button select Submit to Human Resources from the drop-down menu

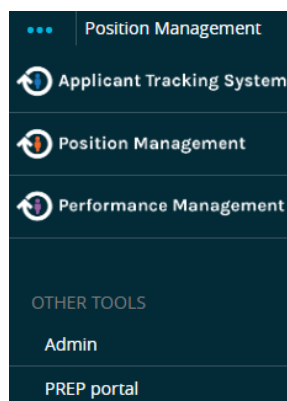
A red rectangular button with the text "Take Action On Action" and a small downward-pointing chevron icon on the right side.

Modify or Audit an Existing Position Description

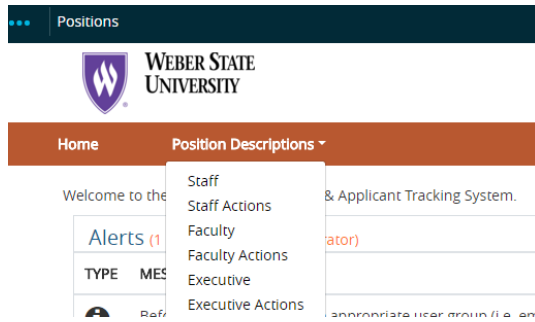
Click on the dropdown “User Group” menu located in the upper right corner and select correct user type—Supervisor.



Click on the three light blue dots in the upper left corner and select “Position Management.” The top banner will turn from blue to orange.



Next, select the “Position Description” Tab on the menu bar in the upper middle portion of the screen. A dropdown menu will appear. Select the type of position you want to modify or audit: Staff, Faculty or Executive.



Click on the title of the position you want to modify or audit from the list. You'll be able to view the details of the existing position description. Click on either Modify Position Description or Audit Position Description from the list in the upper right corner under Take Action on Position Description.



A new page will appear and you will be asked to verify you want to take the selected action. Please note that taking this action will lock the position description from all other updates until the action is completed. If you want to proceed, click Start.

POSITION DETAILS:

Notes:

- The check list on the upper left side of the screen tracks your progress. (See image below)
- In the end, if all check boxes are GREEN then you are good to go. If any items have an orange exclamation point, please click on the item and make the prompted corrections.
- You may use these links to navigate to each page or simply use the Previous and Next buttons on the bottom of each page.
- Remember if you make ANY changes to a page, you must hit SAVE before NEXT.
- After completing all pages, click on "Action Summary" to see all pages at once. You may click the edit link by each area to make additional changes.

Editing Action
<input checked="" type="checkbox"/> Position Details
Proposed Job Duties
<input checked="" type="checkbox"/> Context and Environment
<input checked="" type="checkbox"/> Supplemental Documenta...
<input checked="" type="checkbox"/> Budgetary Responsibili...
<input checked="" type="checkbox"/> Supervisory Responsibi...
<input checked="" type="checkbox"/> ADA Essential Job Func...
<input checked="" type="checkbox"/> Seated Employee
<input checked="" type="checkbox"/> Supervisory Position
Action Summary

REASON FOR MODIFICATION:

Follow instructions on the screen to type in the box labeled “Reason for Modification” to explain your reason for modifying or auditing the position description.

POSITION INFORMATION:

Next, scroll down and make any necessary changes.

Note: Background checks will be determined by Human Resources.

PROPOSED JOB DUTIES:

Follow the instructions on the screen to edit or add specific job functions/duties and include the estimated percentage of time dedicated to each function. This section is required. When finished click Save and/or Next

CONTEXT AND ENVIRONMENT:

Follow the instructions on the screen to add or edit information for all ten required questions. If any box is not applicable, please type N/A in the space provided. Then click Save and/or Next.

SUPPLEMENTAL DOCUMENTATION:

Note: Most supervisors will NOT use this page. Human Resources is the primary user. Click Save and/or Next

BUDGETARY RESPONSIBILITIES:

If the employee is not the named person responsible for a budget, skip this page by hitting Save and/or Next. If they are responsible for monitoring or managing some aspect/s of the budget, but are not the named person responsible, add it as a duty on the Proposed Job Duties tab. Click Save and/or Next.

SUPERVISORY RESPONSIBILITIES:

If the employee in the position will supervise others, click the Add Supervised Positions Entry button and add Title, Classification Type and the Number of people in each listed position or position type. Click Save and/or Next.

***ADA ESSENTIAL JOB FUNTION: (Required)**

Follow the instructions for each section and check the appropriate essential functions. If the employee will perform the listed activity even if only occasionally, you must check it. Click Save and/or Next,

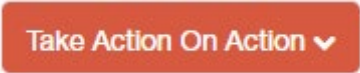
SEATED EMPLOYEE:

Skip this tab.

SUPERVISORY POSTITION:

If not supervisor is listed, search for the supervisor. Click on Filter these Results. Click on the circle next to the supervisor's name. Click Save and/or Next. Note: If you are unable to find the correct supervisor, contact HR.

*When all areas have a green check mark, roll cursor over the Take Action On Action button in the upper right side of the screen and choose Submit (Move to Human Resources) if you are modifying the position description. Choose Submit (Move to Vice President) if the position is being audited.



HR will email you when the position description has been reviewed and approved.

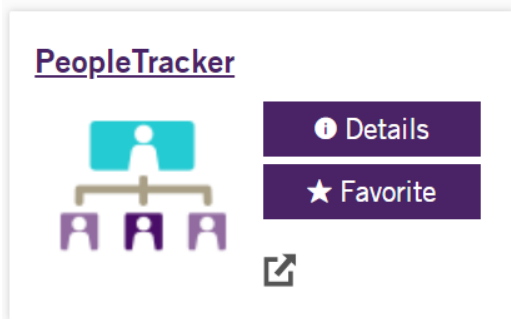
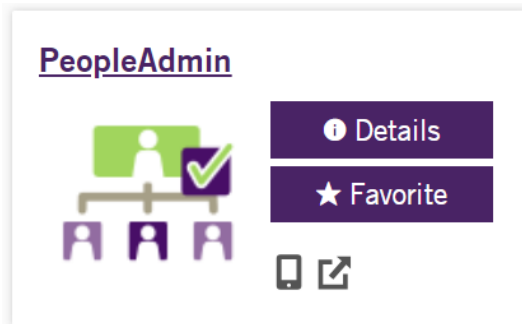
Posting Positions

Log into the e-weber portal

Type "PeopleAdmin:" in the search bar. Both icons below will appear. "People Tracker" is the old (5.8) version. Performance Reviews (PREP) will still be done in PeopleTracker until further notice.

Note: Before logging in for the first time, bookmarks need to be updated, as well as links and quicklinks posted on other sites and correspondence.

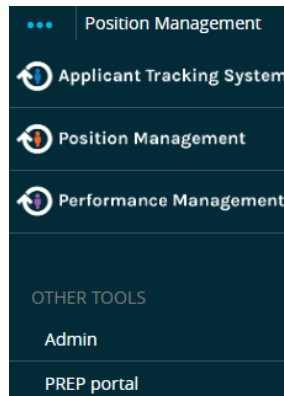
PeopleAdmin (PA7) is the replacement system for PeopleTracker. It is fully operational for creating Position Descriptions, Job Postings and Searches. Click on the PeopleAdmin app to begin.



Opens to the **HOME PAGE**:

- Be sure you are in the correct user type for the action you are taking. In this case, you must select supervisor.
- Required fields are noted by an Asterisk.
- ORANGE bar at the top of the screen indicates you are in the position descriptions module (POSITIONS).
- BLUE bar at the top of the screen indicates you are in the job postings module (HIRE).
- The “Next” button at the bottom of each page automatically saves your key strokes. However, if you come back to a completed page and make changes, you must hit the SAVE button before NEXT.

Click on the three light blue dots in the upper left corner and select Applicant Tracking System. The top banner should now be blue.



Next, select the Postings Tab on the menu bar in the upper middle portion of the screen. A dropdown menu will appear. Select the type of posting you want to create (i.e. Staff, Faculty or Executive).

Staff Positions

POSTING A POSITION:

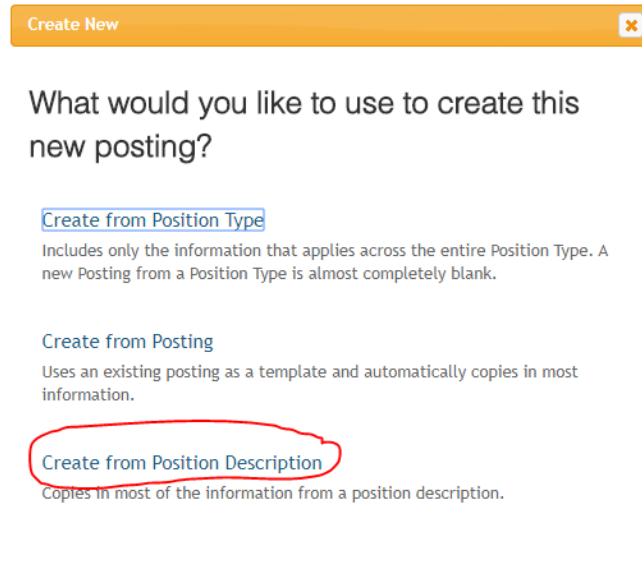
On the drop down under Postings, click on Staff. Here you will see a drop-down menu of all Job Descriptions from which you may choose to post. Click the orange “Create New Posting” button



A Pop-up Window will appear with three choices:

- Create from position type
- Create from posting

- Create from position description
(See example next)



The screenshot shows a dialog box titled "Create New" with a close button in the top right corner. The main question is "What would you like to use to create this new posting?". There are three options listed:

- Create from Position Type**: Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.
- Create from Posting**: Uses an existing posting as a template and automatically copies in most information.
- Create from Position Description**: Copies in most of the information from a position description. This option is circled in red in the original image.

Note: Almost always select "Create from Position Description" for salaried positions

Next Click on Job title of the position you want to post or search for the appropriate position.
Click on Create Posting from this Position Description on the upper right of the screen

NEW POSTING:

Organizational Unit information will pre-populate: Division, Business Unit and Department

Applicant Workflow: Drop-down menu, always choose "Review by Dept."

References: use only if you will request letters of reference directly from the authors.

Online Applications: Default is set for Accept online applications? (HR Use only)

Special offline application instructions: IGNORE this box, unless hiring committee is using an outside source to aid in the hiring process. (HR use only)

Select from the following types:

- Application with Reference Builder (choose only if you will require letters from authors)
- Athletics (for athletics use only)
- Short Application with Reference Builder (choose only if you will require letters from authors)
- Short Application without Reference Builder
- Application without Reference Builder (most common)

Note: Ignore Position Description Documents.

Click Create New Posting button on the bottom, right-hand side of the screen.

Note: If you are unable to progress, a warning pop-up window will appear on the screen with corrective instructions to follow. After making corrections, click “Create New Posting” button again.

POSITION DETAILS:

Read the instructions on the screen and fill in the missing blanks. Note required fields.

Note: When indicating Supervisor and Search Committee Chair, be aware that the person designated as the Search Committee Chair can make changes to or take action on job applications. Anyone designated as Supervisor can view the entire screening process and can view applications, but cannot make changes or take action on applications.

ADVERTISING CHOICES:

Select where you’d like the job posting advertised and provide the INDEX from which advertising costs will be billed. Click Save and/or Next

ADA ESSENTIAL JOB FUNCTION:

Note: You cannot make changes on this tab - For Review purposes only. If changes need to be made, contact HR. Otherwise, Click Next.

SUPPLEMENTAL QUESTIONS:

You may add questions that will help you with your screening process. If you designate an answer to a question as disqualifying, candidates will automatically be disqualified if they select that answer.

There are pre-written questions available for selection in a pop-up window as seen below.

Add a Question✕

Available Supplemental Questions

Category: Keyword:

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Education	Do you have a bachelor's degree?
<input type="checkbox"/>	Education	What is the highest level of education attained?
<input type="checkbox"/>	Experience	How many years of experience do you have in this type of position?
<input type="checkbox"/>	Education	Do you have a masters degree?
<input type="checkbox"/>	Education	Will you have a Ph.D. in hand by the date of appointment or an advanced ABD by the date of the appointment?
<input type="checkbox"/>	Uncategorized	Are you available to work in the evening (6 pm to 10 pm)?
<input type="checkbox"/>	Uncategorized	Are you available to work weekends?
<input type="checkbox"/>	Experience	How many years of Administrative support experience do you have?
<input type="checkbox"/>	Experience	What is your Philosophy for serving students?
<input type="checkbox"/>	Uncategorized	Are you a current employee of the university?
<input type="checkbox"/>	Experience	Please select your primary discipline of research and instruction.
<input type="checkbox"/>	Experience	Please select your secondary discipline of research and instruction.
<input type="checkbox"/>	Experience	Please list your primary and secondary engineering skills.
<input type="checkbox"/>	Experience	How many years of experience do you have working in an office environment?

Displaying 1 - 15 of 37 in total
← Previous | Next →

Can't find the one you want? Add a new one

You may also create your own questions by clicking on the box in the lower right corner labeled "Add a New One."

You must provide a Name for the Question, select a category (from the drop-down menu) and type the question in the box provided.

Specify Open Ended Answers OR Predefined Answers.

Click "Submit"

Add a Question

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name *

Category Please select a category ▾

Question *

Possible Answers

Open Ended Answers

Predefined Answers

Submit Cancel

You may signify the order of the supplemental questions and click a box to make them required.

Note: IGNORE the statement that POINTS can be applied to these questions. WSU uses its own Applicant Rating System and not the one provided by PeopleAdmin.

Click Save and/or Next

Note: Status will be pending until reviewed by HR.

DOCUMENTS NEEDED TO APPLY:

Documents can be required or optional. Click on the appropriate circle next to the document type.

GUEST USER:

Note: Only use for search committee members who are not current salaried employees of WSU (i.e. community members, students and hourly employees).

Follow the instructions on the page.

Click Save and/or Next

INTERNAL POSTING DOCUMENTS: For HR Use ONLY

Click Next

SEARCH COMMITTEE MEMBERS:

Used to add Weber State employees to the Search committee. All existing salaried employees are in the system and searchable. Follow instructions on screen to add members.

Note: IGNORE “Create New user Account” button
Click Save and/or Next

REFERENCE LETTER:

Use only if you are requesting letters of reference directly from the authors. If you will not be requesting letters, leave blank and click Next.

SUMMARY:

Review and edit the posting on this Tab. Remember, GREEN checks are good and Orange exclamation points need attention.

If no further edits are necessary, roll cursor over the orange “Take Action on Posting” button. From the drop-down menu, select Submit (HR Initial Review).

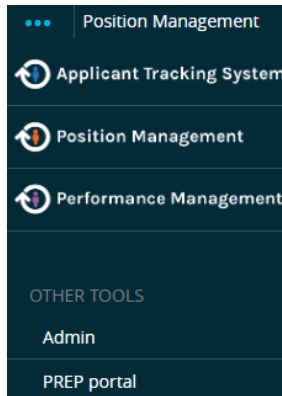


Hourly Positions

POSTING A POSITION:

- Be sure you are in the correct user type for the action you are taking. In this case, you must select supervisor.
- Required fields are noted by an Asterisk.
- ORANGE bar at the top of the screen indicates you are in the position descriptions module (POSITIONS).
- BLUE bar at the top of the screen indicates you are in the job postings module (HIRE).
- The “Next” button at the bottom of each page automatically saves your key strokes. However, if you come back to a completed page and make changes, you must hit the SAVE button before NEXT.

From the Home Screen click on the three light blue dots in the upper left corner and select Applicant Tracking System. The top banner should now be blue.

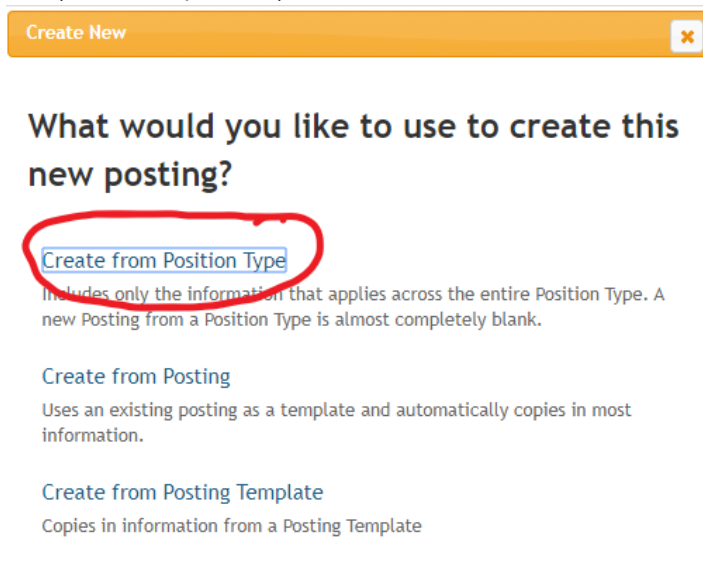


Next, select the Postings Tab on the menu bar in the upper middle portion of the screen. A dropdown menu will appear. Select the type of posting you want to create (i.e. Hourly or Adjunct). Click the orange “Create New Posting” button in the upper right



A Pop-up Window will appear with three choices:

- Create from Position type
 - Create from Posting
 - Create from Posting Template
- (See example next)



Note: You will almost always select “Create from Position Type” for hourly and adjunct positions. You can request that HR make a template for positions that are posted often.

NEW POSTING:

Create from Position Type brings up the New Posting page where you add the Position Title. Organizational Unit information will pre-populate: Division, Business Unit and Department
Applicant Workflow defaults to Review by Department
Online Applications: Default is set for Accept online applications? (For HR Use only)
Special offline application instructions: IGNORE this box, unless hiring committee is using an outside source to aid in the hiring process. (RARE)
Scroll down to the Accepted Application Forms section. Remove the check from Application with Reference Builder and select Application w/o Reference Builder.
Then click Create New Posting button

Note: If you are unable to progress, a warning pop-up window will appear on the screen with corrective instructions to follow. After making corrections, click Create New Posting button again.

POSITION DETAILS:

Read instructions on the screen and fill in the missing blanks. Required fields are indicated by an asterisk.

If you would like to require a background check, please make a comment in the Notes to HR textbox.

Search Committee Chair Access: ONLY the person designated as the SEARCH COMMITTEE CHAIR can make changes to or take action on job applications. Anyone designated as SUPERVISOR can view the entire applicant process, but cannot make changes or take action.

Advertising Details: Select where you'd like the job posting advertised and provide the INDEX from which advertising costs will be billed. Click Save and/or Next

ADA Essential Job Functions:

Follow the instructions for each section and check the appropriate essential functions. If the employee will perform the listed activity even if only occasionally, you must check it. Click Save and/or Next.

SUPPLEMENTAL QUESTIONS:

You may add disqualifying questions that when answered one way will automatically disqualify candidates. There are pre-written questions available for selection in a pop-up window as seen below.

Add a Question
✕

Available Supplemental Questions

Category: Keyword:

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Education	Do you have a bachelor's degree?
<input type="checkbox"/>	Education	What is the highest level of education attained?
<input type="checkbox"/>	Experience	How many years of experience do you have in this type of position?
<input type="checkbox"/>	Education	Do you have a masters degree?
<input type="checkbox"/>	Education	Will you have a Ph.D. in hand by the date of appointment or an advanced ABD by the date of the appointment?
<input type="checkbox"/>	Uncategorized	Are you available to work in the evening (6 pm to 10 pm)?
<input type="checkbox"/>	Uncategorized	Are you available to work weekends?
<input type="checkbox"/>	Experience	How many years of Administrative support experience do you have?
<input type="checkbox"/>	Experience	What is your Philosophy for serving students?
<input type="checkbox"/>	Uncategorized	Are you a current employee of the university?
<input type="checkbox"/>	Experience	Please select your primary discipline of research and instruction.
<input type="checkbox"/>	Experience	Please select your secondary discipline of research and instruction.
<input type="checkbox"/>	Experience	Please list your primary and secondary engineering skills.
<input type="checkbox"/>	Experience	How many years of experience do you have working in an office environment?

Displaying 1 - 15 of 37 in total
 ← Previous | Next →

Can't find the one you want? [Add a new one](#)

You may also create your own questions by clicking on the box in the lower right corner labeled **Add a New One**. You must provide a Name for the Question, select a category (from the drop-down menu) and type the question in the box provided. Specify Open Ended Answers OR Predefined Answers. Click "Submit"

Add a Question
✕

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name *

Category

Question *

Possible Answers

Open Ended Answers

Predefined Answers

You may signify the order of the supplemental questions and click a box to make them required.

Note: IGNORE the statement that POINTS can be applied to these questions. WSU uses its own Applicant Rating System and not the one provided by PeopleAdmin.
Click Save and/or Next.

Note: If you create a new questions, the status will be pending until reviewed by HR.

DOCUMENTS NEEDED TO APPLY:

Documents can be required or optional. Click on the appropriate circle next to the document type.
Click Save and/or Next

GUEST USER:

Note: Only use for search committee members who are not current salaried employees of WSU (i.e. community members, students and hourly employees).
Follow the instructions on the page.
Click Save and/or Next

INTERNAL POSTING DOCUMENTS: For HR Use ONLY

Click Next

SEARCH COMMITTEE MEMBERS:

Used to add Weber State employees to the Search committee. All existing salaried employees are in the system and searchable. Follow instructions on screen to add members.

Note: IGNORE "Create New user Account" button
Click Save and/or Next

SUMMARY: Review and edit the posting on this Tab. Remember, GREEN checks are good and Orange exclamation points need attention. If no further edits are necessary, roll cursor over the orange "Take Action on Posting" button.

From the drop-down menu, select Submit (HR Initial Review).

Take Action On Posting ▼
