PageUp

Search Chair/Administrative Assistants Users Guide

Kenyon.pageuppeople.com

General guidelines for using PageUp People

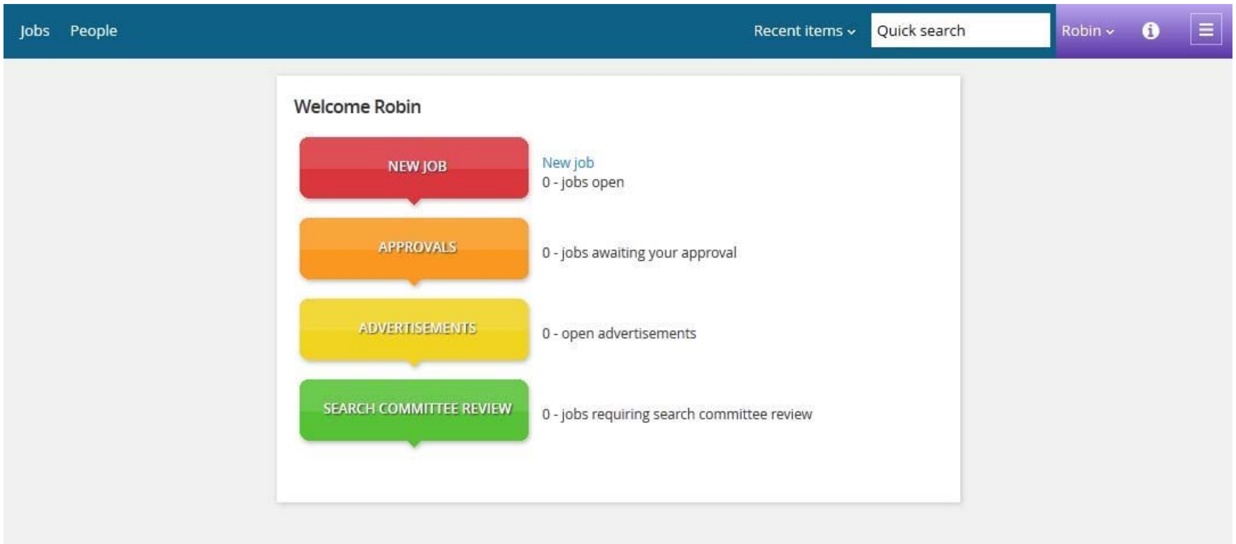
1. Do not use the **Back button** in your browser to go back to the previous page, as your session will be interrupted and you may lose your changes.
2. Your session will timeout after 120 minutes of inactivity.
3. Do not share your login details with any other person.
4. Your computer must meet the following system requirements in order for PageUp People to function correctly:
   - ➢ Microsoft Windows 95, 98, ME, 2000 or XP operating system
   - ➢ Microsoft Internet Explorer 5.5 or above web browser. For optimal results, we recommend the use of IE 8.
   - ➢ A screen resolution of 800 x 600 pixels or higher
   - ➢ At least a 56k modem Internet connection

Pageup is accessed through Shibboleth using the current Kenyon ID and password that you use to access your Kenyon account. If you are accessing Pageup off campus you will need to access through the VPN. Kenyon.pageuppeople.com

Navigating through PageUp People

The following functions are available from the dashboard page.

When you first log in, you will see your dashboard, and bubble options. These options are specific to your role and your permissions group.



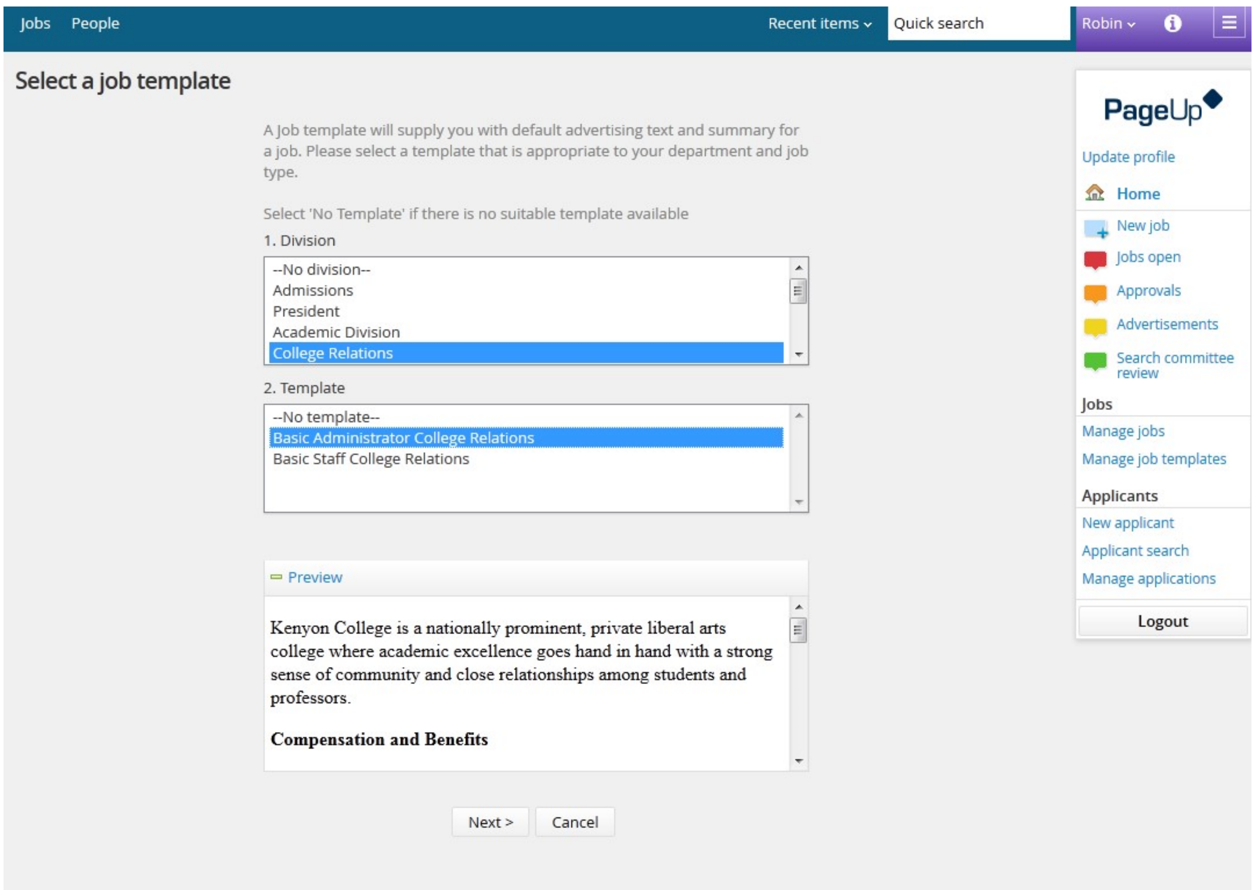
1. Creating jobs

Instructions: Follow the step by step instructions.

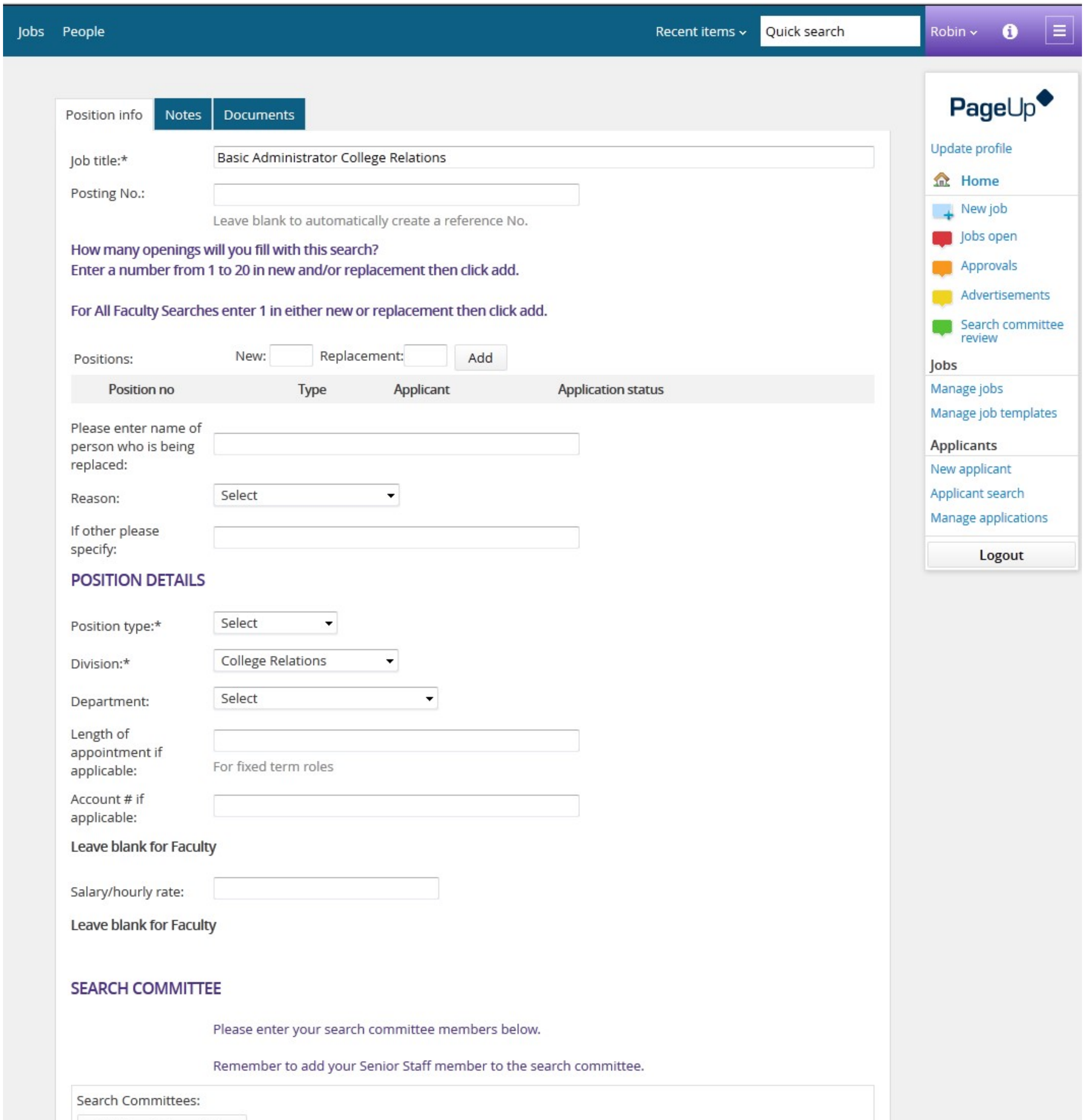
1.1. Creating a job

Click **New job** in the Red Bubble (or on the right side menu if you prefer). If you use job templates before going to the job card you will first see the **select template** screen. Here you have the option to select a template and/ or position from predefined lists to pre-populate sections of the job card.

You can choose to select a template and/ or position or start from scratch. Click **Next.**



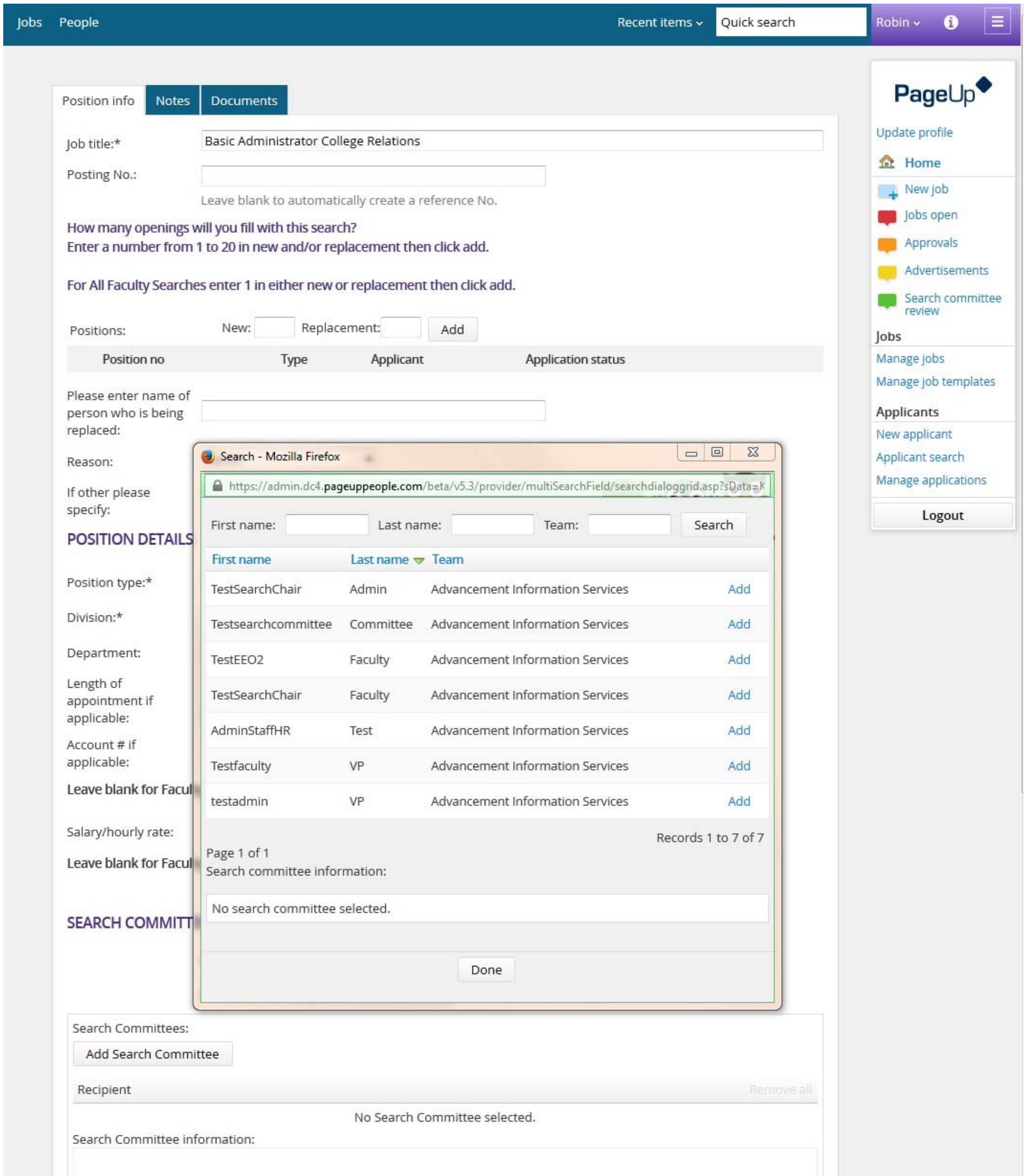
If you choose to select a template or position number, you will notice that some information will be prepopulated onto the job card (depending on how much information is stored on the template or position).



At a minimum, Job Title will be pre-populated. **Make sure to change the Job Title field to the actual title for which you are hiring.** Proceed to fill in all mandatory (and optional, if known) fields on the job card.

- Enter the number of openings you are filling for the search. If the position is new, enter this in the new field. If it is a replacement, enter this in the replacement field. It could also be a combination of both. **Click Add**.
- If details of the person being replaced, reason, and other information is known, please enter.
- Pick the position type (faculty, admin, staff); division; and department from the dropdown boxes.
- Enter the length of appointment if this is a fixed term position (i.e. 6 months, fall semester, etc.) Enter the account number to which this position should be billed, if known.
- Enter the salary or hourly rate ($25,000, 13.79/hour, etc.)

- Click on the Add Search Committee button and a pop-up window will appear to allow you to search for current employees by first or last name. You can also search by department in the "Team" box.



- Click the blue add link next to the name of the person(s) you want to add to the search committee list **(including yourself and your Division VP)**. Click "Done" when you have added all of your names.

- The Recruitment process should pre-populate in the Recruitment Process Box. If not, select from dropdown.
- Enter the details of the recruitment plan: Publications (required), Email Distribution Lists, Direct Contact advertisements; Diversity Plan (required); and the Screening Process.

- *If you have any documents (i.e. Interview Questions, Checklists, etc.) or notes that you want the entire search committee to see, please add those to the notes or documents tab at the top of the posting.*
- Type a short description of your position for external advertisements in the "Short Description for External Ads" box.
- **The Full Description box is prepopulated with required EEO information. In some cases, it may also contain a basic template for the position. Please edit any generic pieces of the template and add additional information above the required EEO information.** Please do not make any changes to the pre-populated EEO information which begins "Kenyon College is a nationally prominent, private liberal arts college where academic excellence goes hand in hand with a strong sense of community and close relationships among students and professors" and follows with additional links and information.

At the bottom of the job card, there will be a section to fill in an approval process for the position. Fill in the names of the employees associated with this search, under their correct job role. Sometimes this information may be pre-populated. If the pre-populated information is incorrect, you may type over and change it.

- HR: **Always enter** hr@kenyon.edu
- Admin Assistant: Enter your name if you are the AA. Enter the AA of the search if you are the search chair.
- Search Chair: Enter your name if you are the Search Chair. Enter the Search Chair's name if you are the AA.
- The approval process should be pre-populated in the drop down box. If not, choose from the dropdown.
- EEO: **Always enter** KenyonEEO@gmail.com
- VP: Enter the name of your Division VP
- Admin HR: **Always enter** hr@kenyon.edu
- Status: Use the dropdown and **always enter Pending Approval**.

Click **Save** to save the job card without exiting the page. If any required information is missing, a red star will show you what information needs to be entered. **If all required information is present, when you click save, the posting will move to the first stage of the approval process.**

1.2. Entering a job note

From the job card, click the **Notes** tab, **Add** a sample note, and then click on **Save**. The note will be time and date stamped with your user name. If you have completed your entire posting, you can also simply press the next link at the bottom of the page to enter a job note.

1.3. Attaching a job document from file

This is not required and will not be used for most positions. **Select** a **document from file** to upload a document from your computer. Choose a file, give it a name and assign it to a document category before clicking **Save**. If you leave the document title field blank, it will default to the title of the uploaded document. Click **Save** on the job card to save the job card without exiting the page. The job <u>must</u> be resaved in order for the **View** button to become active. You can also access this page by simply clicking the next link from the bottom of the Job Note page.

1.4. Workflow

After submitting the posting, the system will send a notification to the EOOs who will review the posting. If further changes are needed, the EOO will decline the job, sending the posting back to the Search Chair or Administrative Assistant (you will receive an email notification). Otherwise, the posting will be forwarded to the Division VP who can send it back for further changes or approve it and send it to HR for review and posting.

Search Chair/Admin Assistant

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Equal Opportunity Officers

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Division VP

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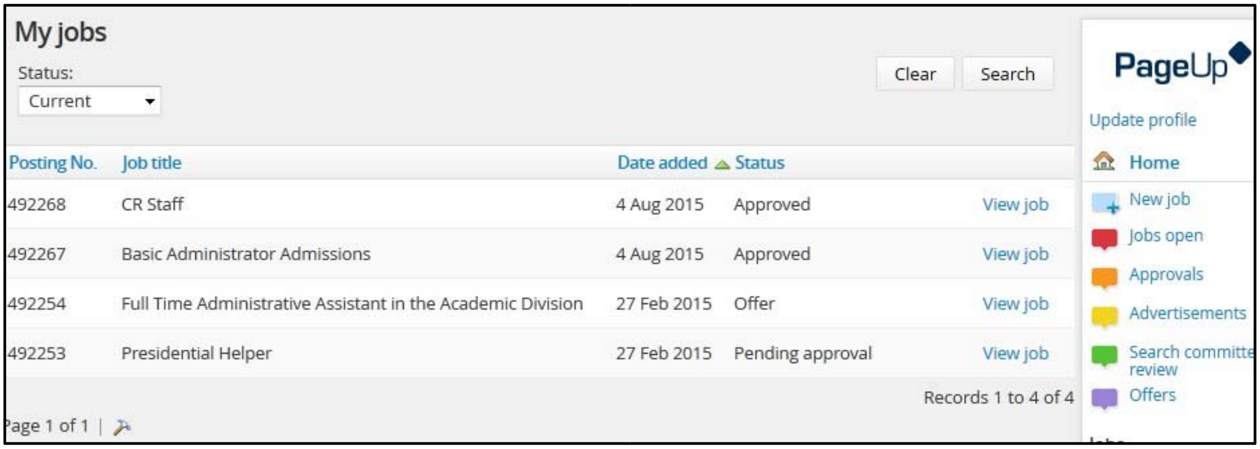
Human Resources

2. Reviewing applicants

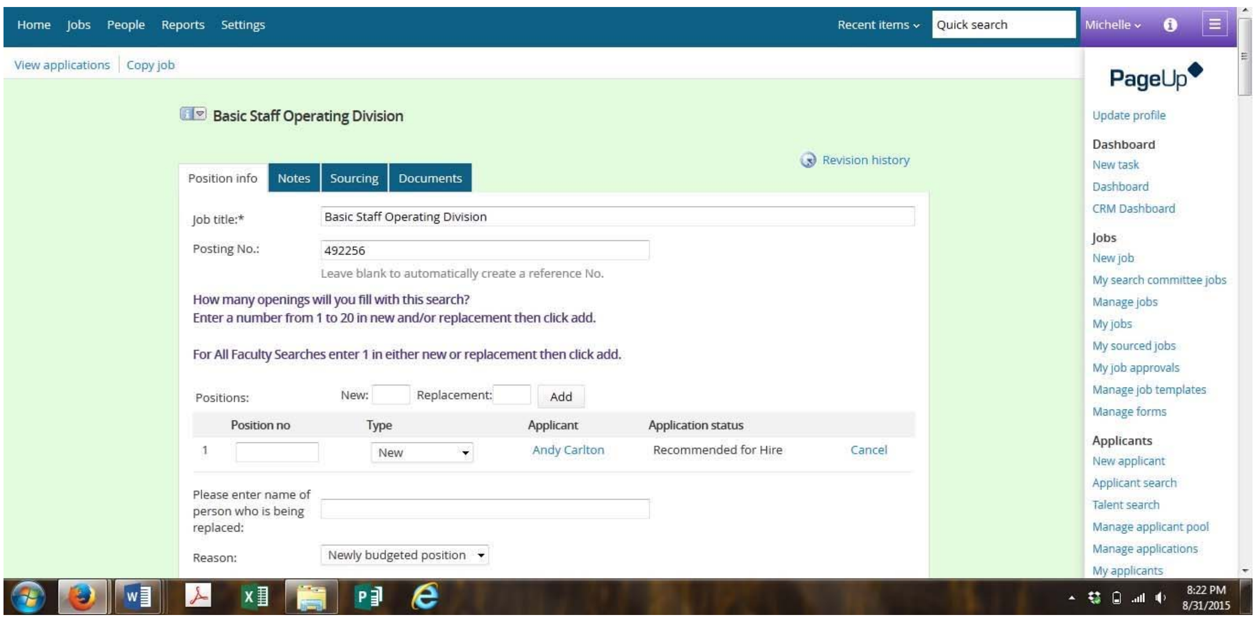
2.1. Reviewing applications

Return to your dashboard and select your open jobs. These can be accessed by the blue link next to the New Job bubble or from the "jobs open" link on the right side of your screen.

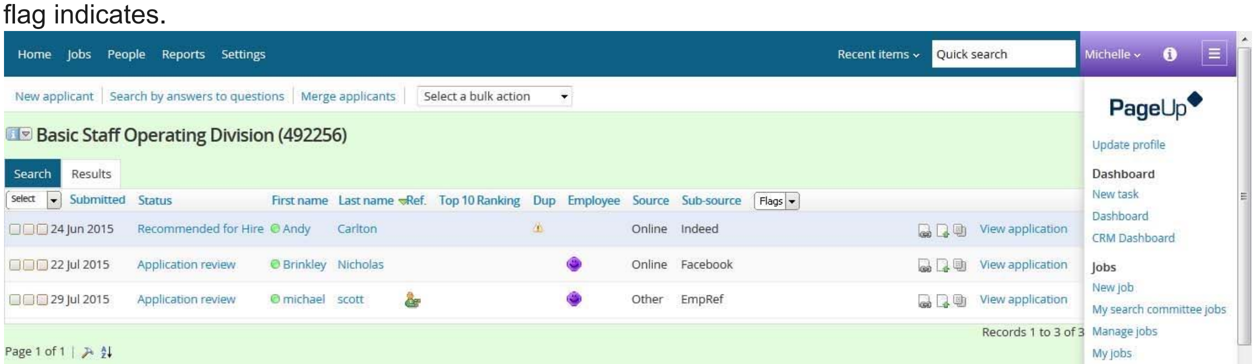
You will be directed to the list of jobs you have open, as seen in the example below. You can then select "View job."



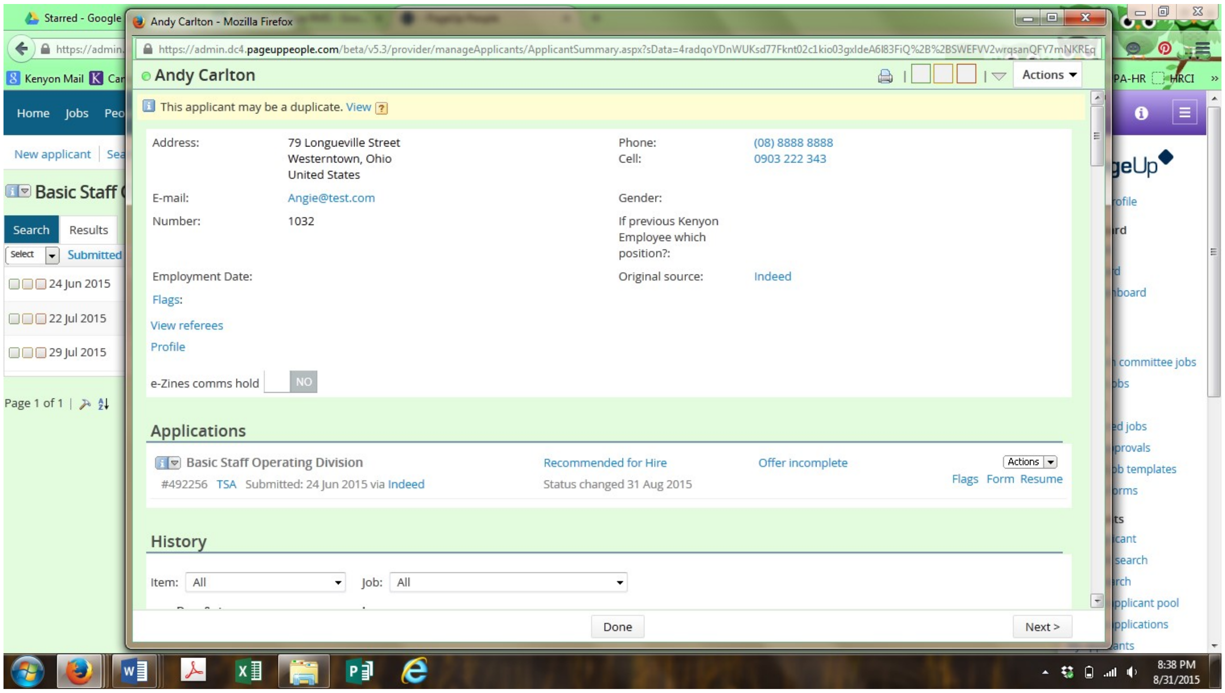
All links in the PageUp system that are blue are a hyperlink. Once you have selected the job, you will be directed to the job information on the open position. Once you open the job, you will see the option to view applications on the upper left hand corner of the screen.



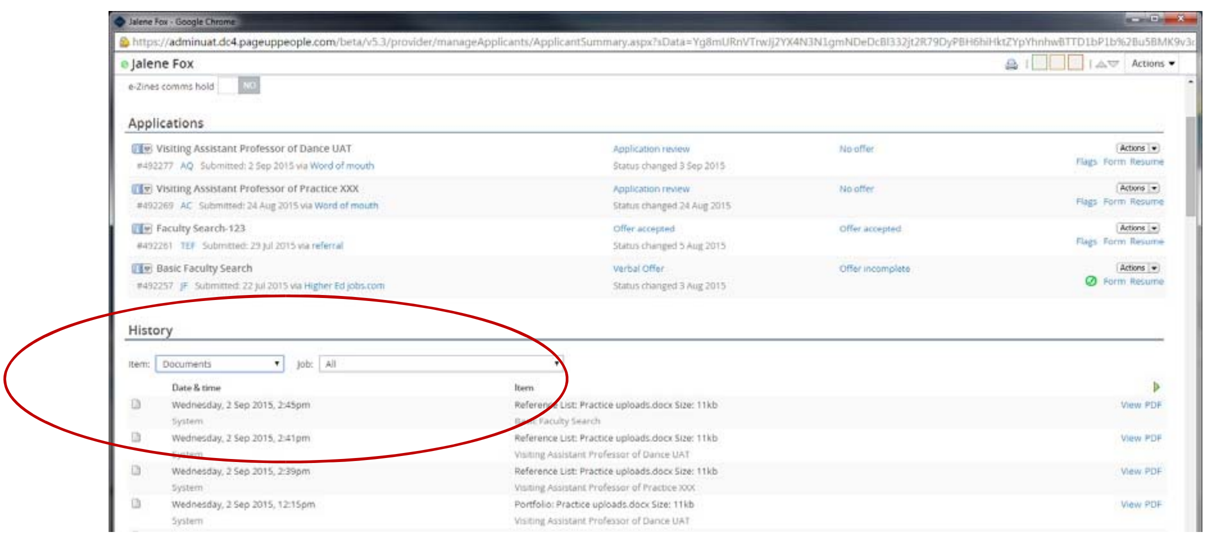
You may see a flag under the column labelled Employee. If you hover over the flag, you will see what the flag indicates.



Click on "view application" and a pop up box will appear. The top of the box will contain basic information about the applicant. The middle of the page will show the job to which the applicant applied and will give a history of the application process to date. Scrolling to the bottom of the box will show a copy of the resume submitted.

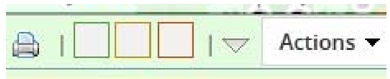


The **middle of the page** will show the job to which the applicant applied and will give a history of the application process to date. Note: if you select "documents" in the drop down box next to "item", you will see only an applicant's submitted information (see red circle below).



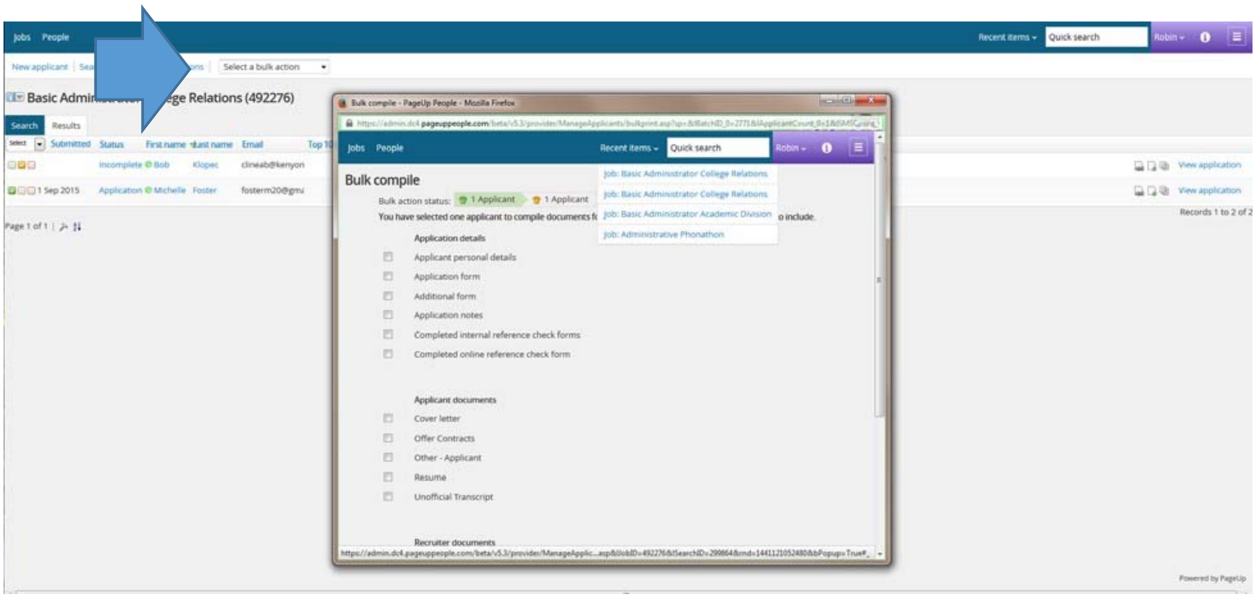
Scrolling to **the bottom of the box** will show a copy of the resume submitted.

A search chair (and committee members) may also elect to *individually* note thoughts on the applications under review. The series of tick boxes adjacent to the scroll arrow can be used to assign a quick rating for each applicant. For example, you may want to place a tick in the green check box for those individuals you want to continue considering.



2.2. Compiling application information for your search chair

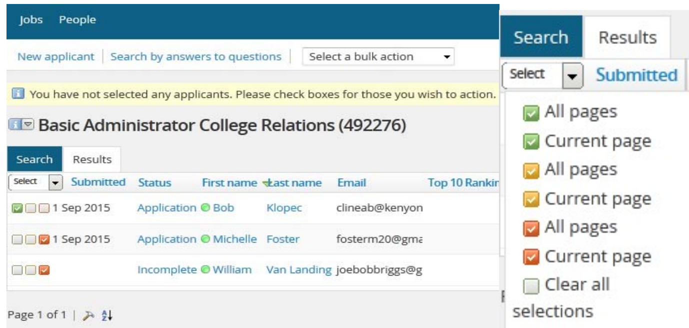
From the View Applications Page you can compile applicants into a single .pdf for your search chair or committee members to review. Use the "Select a Bulk Action" dropdown box at the top of the page and choose the option to "bulk compile and send." A Pop-up box will appear with options to pull the information into a .pdf. Check the boxes you desire and click "Create .PDF." Another page will appear asking you to send the compiled document by entering the email address to whom you wish to send. You can also enter one additional email address in the box labelled "Other e-mail." Should you need to send to the entire committee, once the first batch of 2 is sent, simply hit the "create .pdf" button again and repeat the process. Close this box when you are finished.



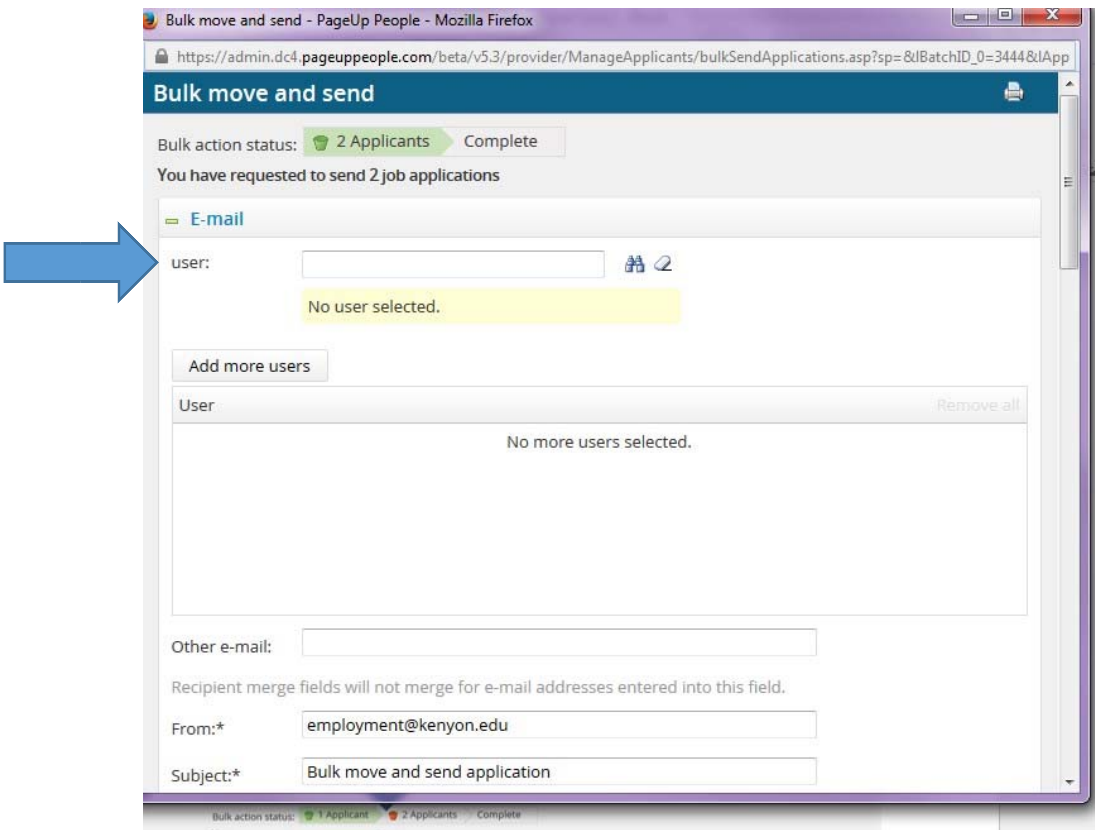
2.3. Changing applicant status

Once the committee has made their selections for the Top 10, you can change the applicant's statuses. Changing applicant status is a critical part of system functionality. The status an applicant sits in will track not only their progress on the job but will communicate to others on the search committee what is happening with each applicant. Some statuses send automated emails to applicants, and others allow the top candidate to enter into the hiring process.

To change multiple applicant statuses at once, from the *view applications* screen, click a checkbox next to the applicant name. There are three colors of checkboxes which you may use to assist you in the move process. For example, you may check all applicants you do not wish to move forward as a red checkbox; then check the green box for those you do wish to proceed. You may also click the select dropdown to move entire pages into a particular color for the move. Before any interviews are scheduled, please identify your Top 10 for EEO approval by checking the green box beside the chosen applicants:

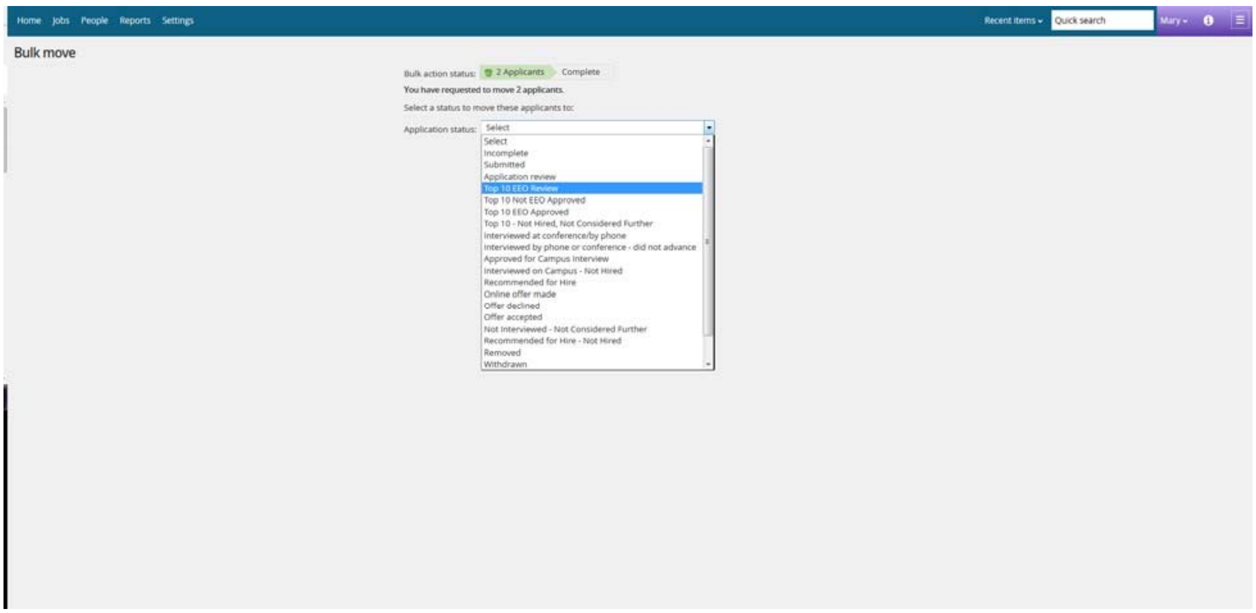


Once your checkmarks are in, click the *Select a Bulk Action* dropdown and choose Bulk Move and Send. Enter KenyonEEO@gmail.com in the box titled user (see arrow below).



Scroll down to the body of the email (leaving the information that is already populated) and type in the reason that each applicant is Number 1 of the Top 10, Number 2, etc. (this replaces the Top 10 report that was previously done manually)

Scroll down and click Next. A new pop-up will appear allowing you to choose the new application status.



Select the appropriate status. A pop up will appear showing you the system users that will be notified when the move occurs. **The applicant will not be notified at this stage though the text indicates this is a possibility. Default settings have been entered, and no adjustments are to be made to this page.** Simply click “Move Now” at the bottom.

Once the moves are made, you will be directed back to the applicant list and you will see that the statuses have changed to your selections. The approval process for these applicants will automatically be initiated with the EEO by a system generated email.

3. Making an Offer

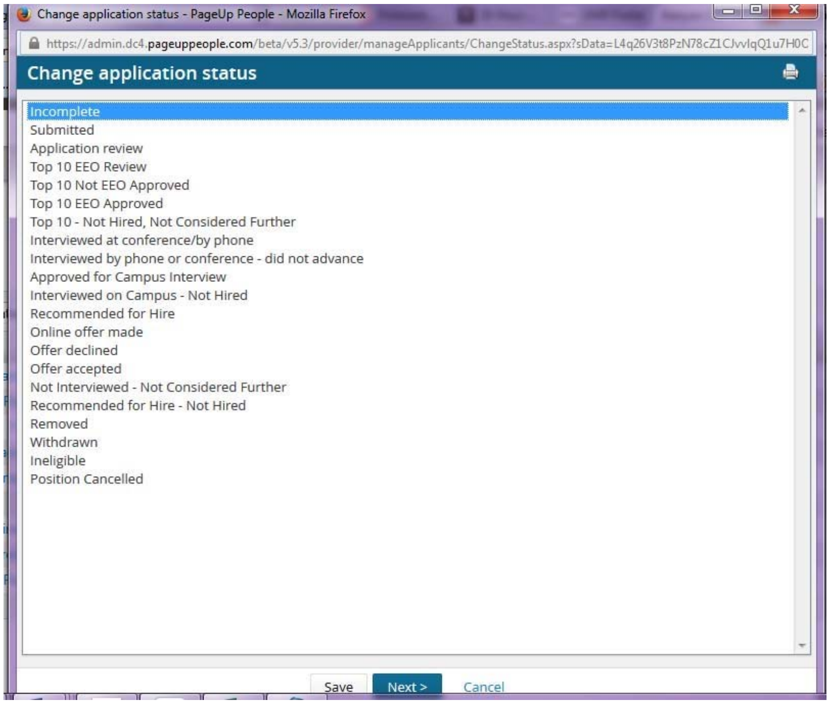
3.1. Moving to Recommended for Hire

Once all of the candidates are in the appropriate status, the final candidate is to be put into a *Recommended for Hire* status. You will again see a pre-populated page and a section about communicating with the applicant. Do not make changes in this section. **Simply click “Move Now” at the bottom of the page.** Human Resources will notified to begin the background check process.

3.2. Changing status of Remaining Candidates

PLEASE NOTE: The changing of statuses in PAGEUP to NOT INTERVIEWED, NOT CONSIDERED FURTHER or TOP 10- NOT HIRED, NOT CONSIDERED FURTHER will generate an immediate email notification to the applicant. All Interviewed statuses require a personal email or phone call from a search committee member or search chair.

Change the status of all remaining applicants. These can be changed in bulk. Please choose from the list of reasons provided. There are several options at this point:



Additional Tips for Using the PageUp System

Quick search

Quick search allow users to perform a search for an applicant or job at any time.

To quickly find an applicant or job, enter your search criteria into the quick search field and click **GO**. Your search results will be displayed in a pop-up window.

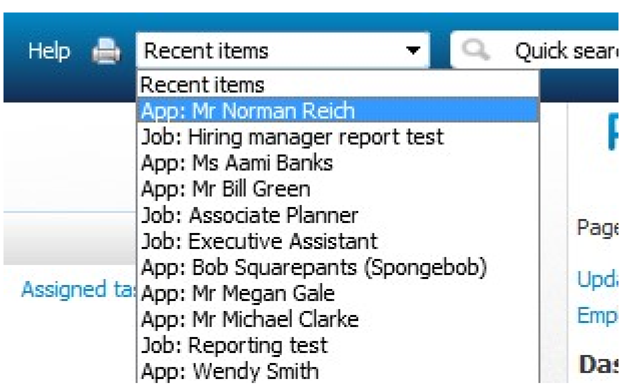
Tips for quickly finding applicants or jobs:

1. Applicants can be searched by entering the full first & last name of an applicant. E.g. John Smith.
2. Any part of an applicant's first or last name can be entered. E.g. J Smith, John S, ohn or Smith.
3. Jobs can be searched by entering any part of the job title. e.g. To search for a job titled Software Engineer you could enter: Software Engineer, Software, Engineer or Soft
4. Jobs can also be searched by on by job number. E.g. 673528

Recent item history

The recent item history drop down displayed the last 10 applicants and/or jobs viewed by the user. This gives the user the ability to quickly jump directly to a previously viewed item.

Step 1: Click on the drop down menu to view the last 10 applicants and jobs viewed. Even if you have only just logged into PageUp People, the last 10 applicants and jobs viewed in your previous session will be stored in your recent item history:



Step 2: Click on the applicant name or job title you wish to view. You will be redirected to the applicant or job card. If you have viewed an applicant card in the pop up window, the most recent applicant will appear if the user refreshes the page or navigates away from that applicant card.

Printing a page

Any page within the PageUp People system can be printed, excluding pop-up windows.

To print a page:

1. Click the Printer () icon in the PageUp People sub menu.
2. Select your printer, and click the Print button.

Tip: To print all records from a list of information, not just the current page, first click the Show all records link at the bottom of the list of information.

Filling in fields

Fields in PageUp People are filled in by entering data directly on the screen or selecting from drop down or lookup lists. Described here are some common field types and how to fill them in.

Mandatory fields

Mandatory fields are flagged with a star. These must be completed when filling in a screen.

Lookup or Binoculars fields

Binocular fields are used to allow users to select from a large set of data e.g. users, cost centres, or departments. To populate binocular fields, click on the binocular icon to view a pop up window which will allow you to search through the data. Select the data you would like to enter by clicking on the appropriate row, then click OK.

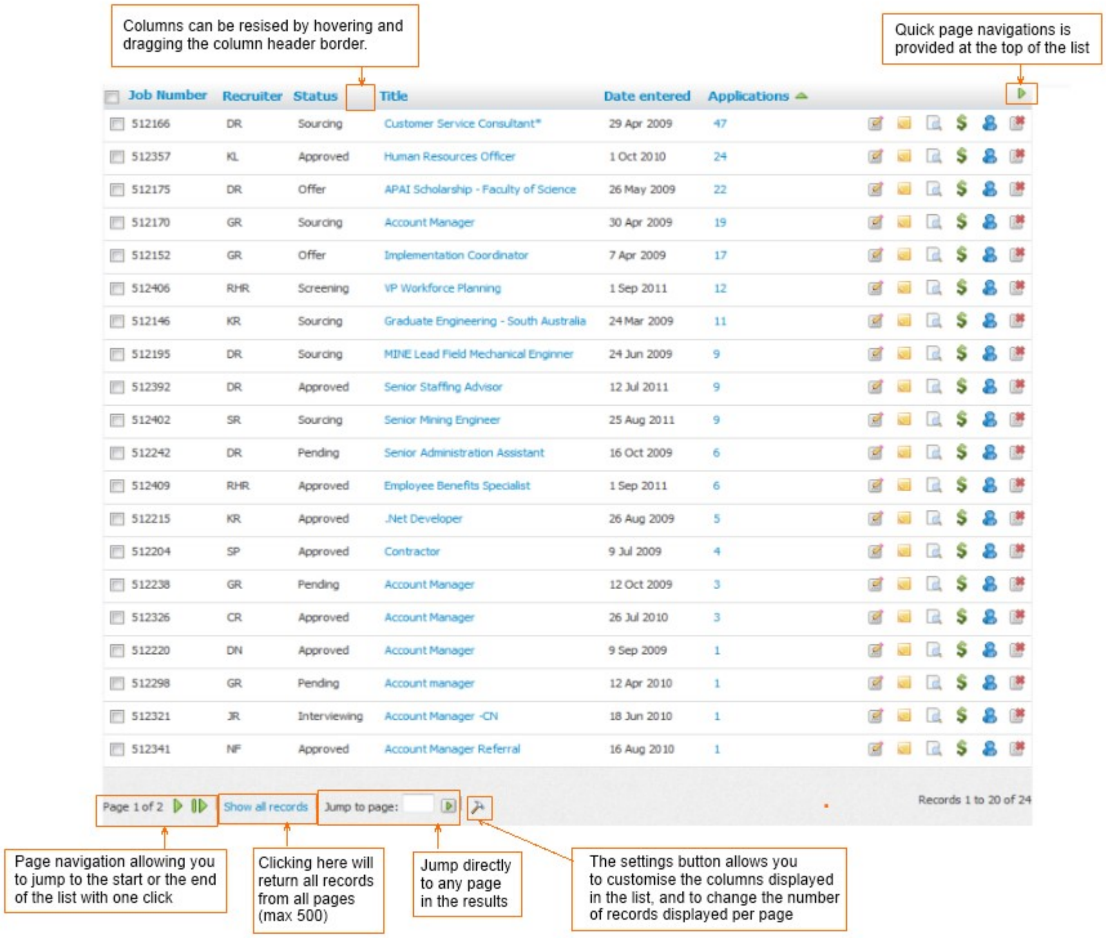
Managing lists of information

All lists of information throughout the system support the following functions:

- Enhanced navigation between pages of information.
- Show or hide columns.
- Change the number of records displayed per page.
- Show all records.

Tip: These functions can be utilized to remove a horizontal scrollbar, by resizing columns and hiding unwanted columns of information.

Functions at a glance:



Navigating between pages of information

Quite often, too many results will be returned to display on a single page. When this occurs, PageUp People provides a number of navigation facilities:

Navigate between pages:

1. Click on the appropriate navigation icon, or enter a page number into the Jump to page field and click the button. You will be taken to the page you selected.

Showing or hiding columns

1. Click the settings button ( ) at the bottom of the list.
2. Select the columns you wish to display by checking or un-checking each column listed.
3. Click the Save button. The screen will re-load and your columns will be updated.

Changing the number of records displayed per page

1. Click the settings button ( ) at the bottom of the list.
2. Select the number of records you would like displayed per page: 20, 50 or 100.

3. Click the Save button. The screen will re-load and the number of records displayed will be changed.

Showing all records

Note: A maximum of 500 records will be displayed using this facility

1. Click the Show all records link at the bottom of the list. If there are more than 500 records in your list, a warning message will be displayed confirming that only the first 500 records will be returned.
2. The screen will re-load will all records displayed. Note: Depending on the amount of information being returned, this may take up to a few minutes to complete.
3. To return to your standard list of information, click the Return to standard list link at the bottom of the list.