Hiring Manager’s User Guide
Navigating PeopleSoft Recruiting Module

DEVELOPING TALENT & DELIVERING PROGRAMS FOR
A GREAT UNIVERSITY WORKPLACE
PeopleSoft Recruitment & Candidate Gateway

Hiring Manager's User Guide

PeopleSoft Recruitment Module provides UB hiring authorities and search committees a paperless recruitment, selection and hire system, while Candidate Gateway is UB’s self-service recruiting platform providing a gateway for interested job seekers to apply for and track job opportunities.

This helpful outline illustrates the variety of tasks and roles involved when UB acquires talent. The following steps not only help support our hiring authorities in finding the right person, for the right job, at the right time, they also:

- Support a thorough review of the work environment to confirm it is the right job.
- Ensure the timing is optimum and reflects sound stewardship of UB resources.
- Determine the essential knowledge, skills, abilities and experience necessary for a successful candidate to succeed and participate in building a great university workplace.

Recruitment – Identifying and Defining the Hire Need

- From Position Description to “Marketing the Job” Announcement
- Budgeting and Position Management
- Creating a New Job Opening
- Posting the Job and Sourcing Applicants
- Developing the right Selection Committee Chair and Members (optional)
- Work Flow and Electronic Approval Processing

Selection – Assessing Applicants and Converting to Candidates

- Receiving E-Mail Notification of Qualified Candidates
- Online Viewing of Applications, CVs, Resumes, and other Materials
- Scheduling the Interviews
- Documenting All Candidate Contacts and Assessments

Hire – Preparing and Making the Offer

- Checking & Documenting References
- Verifying the Final Candidate’s Credentials and Experience
- Determining Hire/Appointment Base Salary and Schedule
- Finalizing the Hire/Appointment Letter
- Completing the Hire in PeopleSoft
The following Hiring Manager's User Guide provides helpful information and illustrations that supports UB’s virtually paperless recruitment, selection and hire process. This contemporary, environmentally sustainable process aids in both improving effectiveness and increasing efficiency.

We begin with identifying available tools, job aids, and resource materials specially designed to support your success in:

- Creating a Job Opening in PeopleSoft
- Tracking the Job Opening via Online Approval Workflow
- Managing the Applicant
- Scheduling the Interviews
- Documenting the Steps to Hire

A Hint from the Guide Development Team: When you are ready to perform the tasks and navigate the various PeopleSoft processes outlined above, consider opening your User Guide in a separate side-by-side window next to your PeopleSoft Recruiting module window. The step-by-step design will inform and direct your attention as you gain familiarity in the use of PeopleSoft.
https://logon.ubalt.edu/my.policy

UB’s Office of Human Resources website can be accessed via MyUB and requires your UB NetID and password.

Under the Recruitment banner, choose Recruiting Website to review the 6 Steps of Successful Recruiting.
Click on the plus sign to activate the ‘information accordion’ and review the information. Clicking on designated links will provide UB forms, job aids and resources.
UB’s position description (PD) form has been newly revised and re-designed. A PD is required for each UB employee and should be reviewed annually during the employee’s performance review, and when the opportunity to hire occurs.
Click on the plus sign to activate the ‘information accordion’. If you are interested in online viewing or printing this Hiring Manager's Guide, click the link.
Click on the plus sign to activate the ‘information accordion’. If you are interested in online viewing or printing the Applicant Guide, click the link.
**Definitions:**

- **Applicant** – An individual, after reviewing the job posting, demonstrates his or her interest in the position by submitting an online application that may include a resume or CV and other related materials.

- **Candidate** – An applicant who meets the minimum requirements of the position and is routed by the HR Recruiter to the hiring authority for review. Regulatory compliance requires that applicants whose materials are reviewed and/or are contacted by the hiring authority automatically convert to job candidates, and further documentation by the hiring authority is required which is completed online.

Click on the *plus* sign to activate the 'information accordion'. This step outlines the various tasks related to applicants and candidates.*
Click on the *plus* sign to activate the ‘information accordion’. This step outlines the tasks required to verify and conduct reference checks regarding the final candidate’s experience and background.
Click on the plus sign to activate the ‘information accordion’. This step outlines the tasks required to establish and make the offer/appointment, generate the offer/appointment letter and upload into PeopleSoft while generating a copy for the finalist's review, agreement and signature.

For non-faculty hires, your assigned HR Business Partner Team may be a valuable resource throughout the recruitment, selection, hire and on-boarding processes. Their contact information is available by clicking on the link.
This concludes a look at the Hiring Manager’s Tools and Resources – including the OHR website. Both the Hiring Manager’s Guide and the Applicant’s Guide can be accessed online via the website, saved in its Adobe .pdf format, or printed.

The remainder of this guide provides the Hiring Manager and/or their delegate a step-by-step PeopleSoft Recruiting Module walk through.
A Hint from the Guide Development Team: When you are ready to perform the tasks and navigate the various PeopleSoft processes outlined above, consider opening your User Guide in a separate side-by-side window next to your PeopleSoft Recruiting module window. The step-by-step design will inform and direct your attention as you gain familiarity in the use of PeopleSoft.

NOTE: When performing actions in PeopleSoft (PS), a spinning symbol in the upper right hand corner of the screen indicates PS is processing. Sometimes processing is quick while other times, it requires patience. If the system remains in this mode for 1-2 minutes without completing the transaction, call the OTS Help Desk at ext. 6262.
Signing into MyUB requires your UB NetID and password.

https://logon.ubalt.edu/my.policy

One way to access MyUB is from the UB Home page screen top menu.

Under the Recruitment banner, choose Create Job Opening to enter PeopleSoft Recruiting Module.
Enter Department ID or use the spyglass to access a lookup menu. From that menu choose the department code.

Enter Position Number (PIN) using the field drop down function and choose from the approved list associated with the department. By doing so a number of data elements associated with the PIN automatically populates a number of subsequent data fields.
Review the information and if correct, click Continue.

The Job Opening screen appears showing the Job Opening Status as “005 Draft” and that you are viewing data in the Job Details tab.

You will notice a number of fields are pre-populated because of the PIN entered on the previous screen.

The key fields requiring your attention are the:

> Desired Start Date – when you want the employee to start working.

> Projected Fill Date – when you realistically think someone will be hired.

> Date Authorized – the earliest date that funding for the position is available.

If this is a replacement, use the spyglass to look up and click on the employee’s name that is being replaced.
The Job Opening screen continues and we recommend you verify data in the Schedule Type Regular/Temporary fields.

If this is a time limited position, please designate the Begin and End Date fields.

Again you will notice a number of fields are pre-populated because of the PIN entered on the previous screen.

Please enter the predetermined hire salary minimum and maximum. These determinations would have been discussed and agreed to during preliminary discussion.

For faculty hires salary is typically discussed with the Dean.

For non-faculty hires, salary is typically discussed with the assigned HR Business Partner and/or Compensation. The Budget Office is also informed.

Once completed, click on Next. (Clicking Save as Draft is always recommended in order to save the data provided before going to Next.)

CONGRATULATIONS!
You have completed the entry of data within the Job Details tab. You will now move to the Qualifications tab for this position.
You are in the **Qualifications** tab for this position where you will enter the **Highest Education Level** by selecting an option via the drop down menu.

You will also enter the years of experience range, e.g. minimum 10 years and maximum 15 years.

Once completed, click on *Next.* (Clicking *Save as Draft* is always recommended in order to save the data provided before going to *Next.*)

**CONGRATULATIONS!**
You have completed the entry of data within the **Qualifications** tab. You will now move to the **Job Posting** tab.
You are in the Job Posting tab for this position where you will click the “plus” sign to Add Job Posting.

The Posting Information screen appears. You will add different elements to create the job posting.

For each part of the job posting, determine who will see the particular part of the posting. Unless this is an internal only recruitment, choose the Internal and External option in the drop down menu.

Next, choose what particular part of the posting you will work on (the circled area lists your choices.) Developing standard language for some of these options is highly recommended and working with your HR Business Partner can assist in developing a template for cutting and pasting that saves time.

Cut and paste the appropriate information in each Description field. Continue to Add Posting Descriptions until completed and then click Preview to proofread.
By previewing the job posting you have created, you can further change and re-order your posting details by clicking on Return to Previous Page.

The system automatically orders your details, so this is an important step that assures your job posting reads in the format you want.

Once you complete adding and adjusting your job posting, verify the Job Posting Title and click on Next. (Clicking Save as Draft is always recommended in order to save the data provided before going to Next.)

CONGRATULATIONS! You have completed the entry of data within the Job Postings tab. You will now go to the last tab requiring your attention – identifying your Hiring Team.
You are in the Hiring Team tab for this position where you will choose the Hiring Manager and, if you plan to have a Search Committee or other Interviewers, you will note that in the sections and fields provided.

Not only does this information play an important role in the electronic notification function, it also determines the level of authority and permission involved in changing the status of candidates and the development of offer.

If the decisions related to interviewing team members have not been finalized, this information can be added later in the process.
Once you submit your newly created job opening, PeopleSoft automatically initiates an electronic approval workflow process. At each step of the process, an email notification is sent to pre-authorized individuals assigned to the workflow.

Each email notification provides a link to your job opening request for review and approval.

As the job opening moves through the workflow process, a date and timestamp is registered at each approval point, making it convenient to track where a job opening request is at any point in the process.

It’s final destination is the HR Recruiter who will then review and expedite posting to the website and other marketing sources, as applicable.

The following few pages illustrate the PeopleSoft electronic workflow process.
This screen is linked within the email sent to the various reviewers and approvers.

It provides pertinent information, confirming details that may have been discussed early in the process between you, your delegate, UB Budget Office, and/or your HR Business Partner.
Each step in this electronic approval process is illustrated with timed and dated actions, making tracking the progress of your posting easy and transparent.

HR also built in back-ups at each approval stage. If the designated Approver is unavailable, a back-up Approver will complete the step, avoiding unnecessary delays.

The 1st stop in the workflow process is a review by HR Business Partner (HRBP).

The 2nd stop is approval by HR Compensation.

The 3rd stop is approval by the UB Budget Office.

The last stop is the Recruiter who will move your job opening to Open status and begin advertising and marketing.
Final verification and documentation of required approvals and related comments are illustrated.

By clicking on View/Hide Comments, the UB Job Approval screen illustrates the workflow process.
Your approved job opening is available on line for candidate to review and apply. If you want to learn more about the applicant’s experience, the Applicant User Guide is available on OHR’s website.

As the Hiring Manager and/or delegate assigned to manage the job opening and applicants, the following screenshots and instructions outline the documentation required to meet regulatory compliance and the development of reporting metrics.

Paperless and electronic processing is smart and sustainable. As you seek the right person for the right job at the right time, your role is key in providing information about your contacts with, assessments of, and insights into the qualified candidates interested in your job.

Using PeopleSoft’s Recruiting module also expedites communication with you, the HR Recruiter, HR Business Partner, and if applicable, Search Committee members. No longer paper bound, these interested parties can simply go on line, review resumes, CVs and applications, schedule interviews and email notifications, document reference checking and provide final hire/appointment documentation.
As you did when you Created Job Opening, access MyUB and under the Recruitment banner, choose Manage Job Opening to enter PeopleSoft Recruiting Module.

You can either supply the 6 digit Job Opening ID or click the spyglass and review the current listing of job openings. Once you locate yours, click on its Job Opening ID.

NOTE: Once you click on your job opening and PeopleSoft places the job's ID in the Find Job Openings field, you must then click the Search button.
Once you receive the results of your search, click on the job title. You will be placed in the Job Opening screen. All activities - from reviewing candidates to requesting the hire - are performed via this screen and associated tabs.

The ‘tabs’ in the middle of the screen are the different functions you can perform. They provide an easy navigation tool when moving between tabs.

Currently in the Manage Applicants tab, you see a listing of candidates that were routed by the HR Recruiter, who determined the applicant’s qualifications met the minimum requirements of the position.
The Activity & Attachments tab provides a summary of job posting actions (Job History) that have occurred, in addition to adding:

- Notes about the posting
- Additional documents
- Track applicable expenses

The Job Opening Details tab provides you another look at the information provided in the Create Job Opening process.
From the Job Opening’s Manage Applicants tab, click on a candidate’s name (link) from the list of candidates.

You are at the Manage Applicant: [name] screen, comparable to a file folder of activities for that candidate.

Tabs for the candidate include:
- **Applicant Activity/Current Status** displays job(s) for which the candidate submitted application(s).
- **Contact Notes** used to document communication between anyone assigned to this job opening and the candidate.
- **Applicant Data** allowing access to review candidate supplied documents e.g., application, CV, resume, cover letter, etc.
- **Interview Schedule /Evaluation** used to schedule and document interview(s.)
- **Expenses** used to document UB’s costs associated with assessing the candidate.

Click on Applicant Data tab and review candidate supplied documents.
In the Applicant Data tab, when you click on View Application you can quickly review specific and required information provided by the candidate.

From the Application Details screen, you can click on links to review documents upload by the candidate.

NOTE: For faculty positions, OHR designed a brief, demographically focused ‘application’ that requires less than a minute to complete.

For non-faculty positions, a comprehensive and informative application is required and available for review.
Within the Applicant Data and Contact tabs, candidate address, phone and email information is provided to assist the Hiring Manager and/or delegate in contacting the candidate.

A Contact Note should be created to document each contact and/or attempt to contact the candidate. This is accomplished by clicking the Contact Notes tab.
The Contact Notes screen is where instances of communication or attempted communication with the candidate are documented.

Another option offered on the Contact Notes tab is adding Interested Parties.

This option requires the identified individual have a level of security that permits access via the emailed link.

Applicant Notes within the Contact Notes tab houses the description and summary of a candidate contact.

Documents can also be attached. This is helpful if communication takes place in writing, or if additional documentation has been requested and received.

All external documentation related to a candidate’s assessment should be uploaded as part of his/her record.
Here is an example of the *Add Note* feature.

Returning to the Contact Notes tab, the Contact History has been updated.

Also, an Interested Parties was entered and is noted.

Returning to Applicant Activity tab allows further candidate related transactions.
From the Applicant Activity tab, you can route the candidate’s information via an email link to an authorized UB hiring authority by clicking on Take Action and selecting Route Applicant.

This option requires the individual have a security level that permits access via the emailed link.

Although this is not a required step for the Hiring Manager, its explanation and illustration is meant to inform the user of the systems functionality and versatility.

Again, this option requires the individual have a security level that permits access via the emailed link.
As you review candidates, you will change their Route status.

From the Take Action menu in the Applicants table, you will choose the appropriate Select Action item.

For instance, after thorough review of the candidate’s materials, if you choose not to move the candidate forward in the process, you will select Reject Applicant.

Once you enter an updated Status Code, you will then choose from the Status Reason why you used that particular Status Code.

Once completed, click on Submit.
Certain Status Code changes can be made for a group of candidates. From the Job Opening and Manage Applicants/View Applicants screen, click on the particular candidates whose anticipated change is the same.

Click on Group Action and select one of the offered options.

In this example, Manage Interviews is chosen. PeopleSoft will automatically provide you with the Interview Schedule screen.

Each candidate checked on the previous screen will be presented with a corresponding schedule and the option to Notify Interview Team (to be used when notifying a pre-selected Hiring Team, otherwise known as a Search Committee.)
Once the interview is completed, the Hiring Manager and/or each interviewer(s) are expected to document his/her evaluation of the candidate.

From the Job Opening/Applicant Listing, click on the candidate with a Disposition of Interview.

A Disposition Details: Interview screen will appear for that particular candidate. Click on Create New Evaluation.
Complete the Interview Evaluation for that particular candidate, choosing the options from a variety of drop down menus.

Manage Applicant: Sigmund Freud
Interview Evaluation

Complete the evaluation form by providing an interview rating for each category, an overall rating and a recommendation. Provide any appropriate comments. Click the Submit Evaluation button when you are done.

Applicant Name: Sigmund Freud
ID: 47489
Job Opening ID: 300318
Job: Associate Professor

Interview Date: 07/03/2013
Interview Type: Campus

Rate Applicant

<table>
<thead>
<tr>
<th>Category</th>
<th>Interview Rating</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Skills</td>
<td>Excellent</td>
<td>2</td>
</tr>
<tr>
<td>Education/Training</td>
<td>Excellent</td>
<td>2</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Excellent</td>
<td>2</td>
</tr>
<tr>
<td>Technical Skills</td>
<td>Excellent</td>
<td>2</td>
</tr>
</tbody>
</table>

Recommendation

Overall Rating: Excellent
Recommendation: 005 Interview
Reason: 

General Comments

Strongly recommend further interview for final determination.
Once a finalist is selected, the Hiring Manager and/or delegate perform Verification or reference checking.

Guidance on performing successful reference checks that maintain regulatory compliance while providing comprehensive data, is available from your HR Business Partner. They will provide tools and aids to help you get this important task accomplished.

When you are ready to document the completed reference checks, go to the Applicant Data/Verification screen for the final candidate and click on Add Reference.

Provide the requested information and click OK. Once 3-5 reference checks are completed, you are ready to Prepare Job Offer.
The final step of the recruiting and selection process is the hire/appointment.

For faculty, the term “appointment” is used, as this action typically relates to a multi-year contractual agreement often with tenure implications. Each of our Schools has a process they follow in the appointment of faculty.

It remains important to finalize the appointment in PeopleSoft. HR will work with each of our Schools to assist in the finalization of the appointment and recruitment. Appointment documentation can be uploaded to ensure the recruitment record is complete. Either the hiring authority, their delegate and/or business administrator contacts the HR Recruiter to ensure the appropriate steps are completed.

For non-faculty hires, the HR Recruiter will also work closely with the Hiring Manager and/or delegate from this point forward to completed the hire process.

Currently, the hire offer and development of related correspondence is completed and processed by the HR Recruiter, who:

- Finalizes the offer and related details with the hiring authority.
- Extends and discusses the offer with the final candidate.
- Communicates outcomes to all interested parties and ensures the hire offer is complete and routed to the prospective new employee.
- Answers final candidate’s questions, researching if needed, to ensure clarity and understanding.

For faculty appointments:

Once key decisions have been finalized and approved in keeping with the Provost Office/Academic Affairs requirements, the Hiring Manager and/or delegate goes to the Job Opening screen and clicks Take Action/Select Action… for the final candidate and chooses Prepare Job Offer.
For faculty appointments:
Enter requested information and **Upload** an electronic version of the *Appointment Letter*. The *Status* chosen will depend on where you are in the offer process – from *Draft* to *Extend*.

Please add any comments that might be helpful for someone reviewing the *Offer*.
For faculty appointments:

The Job Opening screen has been updated to reflect an offer is being processed and awaiting final approval, acceptance and eventual on-boarding of the new faculty member.
Conclusion

We in the Office of Human Resources hope this guide provides valuable information to support your success in using the PeopleSoft Recruiting Module. We are confident that as you become more familiar with the system and its delivered functionality, you will find yourself saving time and ensuring UB maintains compliance. We will measure the effort and partnerships that support the work of finding the right person, for the right job, at the right time for the University of Baltimore.

We also anticipate our collective partnerships will create opportunities for OHR to update and improve this user guide, and we remain committed to doing so in the interest of your success. Please let us know how the guide might better illustrate or instruct on the various steps when you are recruiting, selecting and hiring. We know that when technology drives a change of roles and methods, there is a period when we further hone and improve what gets delivered “out of the gate.”

We look forward to working with you.

In partnership,

Mary L. Maher, M.A.
Assistant Vice President
Office of Human Resources