PeopleAdmin
Campus Partner Tutorial

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OVERVIEW

The PeopleAdmin system is Loyola University Chicago's Talent Management software utilized to manage recruitment activities, position management, and some onboarding activities for Staff and Faculty. The software has a variety of tools, including job postings, application review and evaluation, diversity/EEO reports, reference checking, background checks, plus documentation automation, and more.

Additionally, PeopleAdmin allows for a fully automated job posting requisition process that includes email notifications, routing, approvals, and document retention. Please note, the Appendix provides more information about the features available within the application.

Regarding the onboarding process, as the Loyola University Chicago (LUC) approved vehicle for initiating, reviewing, completing, and tracking recruitment related work activities for LUC Positions, PeopleAdmin should be the initial outlet for posting recruitment positions & accessing related materials (i.e., applications) for LUC Positions that have been approved based on internal Department communications.

Please note, prior to the online posting of a Position, the review and approval of the information by Human Resources (HR) and/or Faculty Administration is required. Additionally, Staff Positions have an approval process that includes review and/or approval by the Department Supervisor, Division Leader, Provost or Vice President, Sponsored Program Accounting or Finance, and the Human Resources Vice President. Likewise, Faculty positions also flow through an approval process albeit less extensive. Faculty Administration and Human Resources are the final approvers and post Positions when approved at all levels.

➢ **Site Access**
   Hiring Managers & Administrators can login to PeopleAdmin with their LUC UVID and Password at http://www.careers.luc.edu/hr.

➢ Note: When logging into PeopleAdmin, either the Applicant Tracking System or Position Management module will be available.
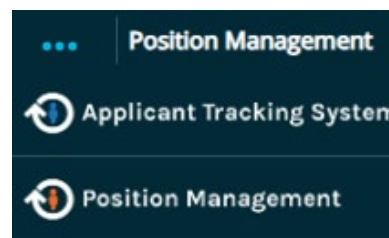
➢ **Questions**
   For assistance with utilizing PeopleAdmin for your Talent Management activities, please contact your Human Resources Manager or email careers@luc.edu.

KEY PEOPLEADMIN MODULES

PeopleAdmin is divided into two primary modules for Supervisors to complete Talent Management related work activities.

Module I - Position Management
The Position Management module permits the creation and modification of Positions in general or for recruitment and reflects an orange banner as an identifier.

Module II - Applicant Tracking System
The Applicant Tracking System module provides access to job postings and Applicant materials and reflects a blue banner as an identifier.

User Group
Access to various features that are assigned to the Position Management and Applicant Tracking System modules depends on the "User Group" selected. Generally, Supervisors should select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is in the upper right area of PeopleAdmin.

REVIEW A JOB DESCRIPTION

Below you will find instructions on how a Department Head, Hiring Manager, or other workflow Approver can review the details of a Job Description.
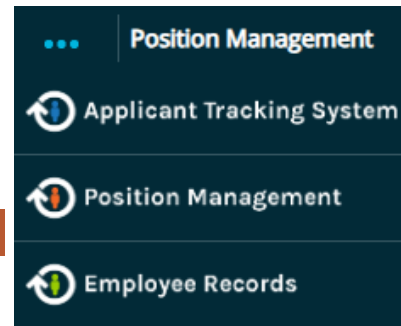
User Group
Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the *"User Group"* section that is location in the upper right area of PeopleAdmin.

User Group:

Hiring Manager ⌄

Position Management View
To review a Position, you will need to select "Position Management," which is in the upper left pane of PeopleAdmin. Once selected, the orange banner will appear, as shown below.

••• | **Position Management**

🔄 Applicant Tracking System

🔄 Position Management

🔄 Employee Records

| Home | Position Descriptions ▾ | Classifications ▾ |

Job Description Review Steps

a. Select the "Position Descriptions" option, choose "Staff," and the results show Positions that report you.
b. Choose the title of the Position (within the Working Title column), and the information will be made available. You may view and print the Job Description. Additionally, you can select the *View Supervisor* or *Print Preview (Employee View)* option to view the information as it appears to the Supervisor or Employee. The "employee" view does not include salary or budget information. See below.

Take Action On Position Description ⌄

🖨 Print Preview

🖨 Print Preview (Employee View)

★ View Supervisor

★ Modify Position Description

SUBMIT A REQUEST TO CREATE A NEW POSITION (I.E., NEW FTE)

The instructions below assist Hiring Managers or Department Administrators interested in starting a completely new Position. These steps should not be completed to back-fill an existing Position.

User Group
Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is in the upper right area of PeopleAdmin.

Position Management View
To create a new Position, you will need to select "Position Management," which is in the upper left pane of PeopleAdmin. Once selected, the orange banner will appear, as shown below.
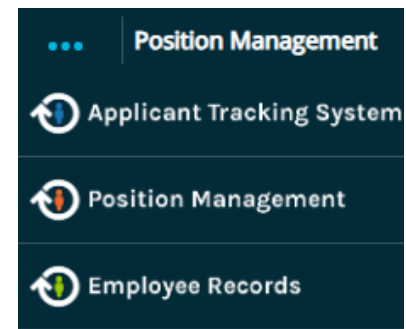
Position Description Steps

a) Select "Position Descriptions" and choose "Staff."
b) Select "+Create New Position Description."
c) Enter the information on the "New Position Description" page and select the "Start Position Request" option.
d) Complete each section listed within the "Editing Position Request" menu.

Note: Once properly filled, a green circle with a check will be available on the left side of the item. If the image is missing, choose the item to complete required information, as displayed in the image to the right. Additionally, as you move through each of the first nine (9) sections, be sure to select "Save and Continue."

1. To begin, choose the **Position Justification** section and add the preferred information.
2. Add the Classification details within the **Classification Selection**. If the classification is unknown, select **TBD Lakeside** or **TBD HSC**.
3. On the **Position Details** page, enter in the necessary information. If necessary, you may need to select "control" when choosing multiple choices within a dropdown list.
4. The **Position Budget Information** section is required. Add the applicable details.
5. The **Supervisory Position** page is prefilled. You can change the Supervisor by selecting "Filter These Results." If the Supervisor cannot be found, notify your HR Manager.
6. **Supplemental Questions** may be added. You can choose a question from the list or select "Add a Question." If the latter is chosen, enter in the desired information. Note – Human Resources needs to approve the new question(s) prior to posting.

> **Editing Position Request**
>
> **Position Justification**
>
> ✓ Classification Selection
>
> Position Details
>
> Position Budget Inform...
>
> ✓ Supervisory Position
>
> ✓ Supplemental Questions
>
> ✓ Position Documents
>
> ✓ Required Documents
>
> ✓ Reference Letters
>
> Position Request Summary

   i. Important Note: Supplemental questions based on the minimum qualifications will be added to the employment application to assist with screening the Applicant pool.

   ii. The time spent adding or creating Supplemental Questions when a Posting is created will save the Hiring Manager/Search Chair time when identifying the best qualified Applicants – especially when the Applicant pool is large.

7. Refer to the required and preferred qualifications of the Job Description when creating supplemental questions and decide which qualification you want to use to screen Applicants. Questions based on preferred qualifications may not be checked as disqualifying.

8. For the **Position Documents** section, you may add supporting PDF materials such as an organizational chart by hovering over the "Actions" option that is located on the right side of the page.

9. On the **Required Documents** tab, you may select the required documentation that must be provided by the Applicant when applying for the Position.

10. Update the **Reference Letters** section to list "No." The selection will keep the current practice of checking references manually.

11. Lastly, in the **Position Request Summary** section, review the information. If necessary, you can make edits to the desired section.

   > Note: You may add the Position Request to your "Watch List" by selecting the "Add to Watch List" option in the upper right section.

Editing Position Request

- **Position Justification**
- ✓ Classification Selection
- Position Details
- Position Budget Inform...
- ✓ Supervisory Position
- ✓ Supplemental Questions
- ✓ Position Documents
- ✓ Required Documents
- ✓ Reference Letters
- Position Request Summary

12. If edits are not necessary, hover over the "Take Action on Position Request" to select the next Workflow Action (i.e., Move Directly to Hiring Manager Review, etc.).

13. Depending on the selected Workflow Action, an email notification may be sent to the Department Supervisor, Senior Leader and/or Human Resources for review/approval.

CLONE A POSITION TO FILL A VACANCY

The instructions below assist Hiring Managers or Department Administrators interested in cloning an existing position for the recruitment of a new Position that is vacant. Note: The instructions should be utilized for a Position that has substantively similar components (i.e., Job Description). This option will use an existing Posting as a template, and automatically copies most information.

User Group
Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is location in the upper right area of PeopleAdmin.

Position Management View
To clone a position, you will need to select "Position Management," which is in the upper left pane of PeopleAdmin. Once selected, the orange banner will appear, as shown below.
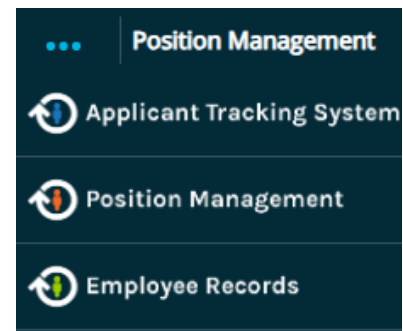
Position Description Steps

    a) Select "Position Descriptions" and choose "Staff."

    b) Select "+Create New Position Description."

    c) Within the "Clone an existing Position Description?" section, locate a current Position in the list. Hover over the "Actions" option and choose "View."

    d) Select the "Clone this Position Description" option.

    e) You will have the option to edit the "Position Request" beginning with the "Position Justification" section. Add the preferred information. Select "Save and Continue." Please note this action can be completed throughout the sections.

    f) Update each of the remaining sections (i.e., Classification Selection) per the instructions listed on the page. **On the "Position Details" tab, leave the "Position Number" blank. If you are unable to remove the Position Number, please notify your HR Manager.**

    g) Lastly, in the "Position Request Summary" section, review the information. If necessary, you can make edits to the desired section.

    h) If edits are not necessary, hover over the "Take Action on Position Request" to select the next Workflow Action (i.e., *Send to Department Head (move to Department Head)*). If a selection is not made, the *Position Request* will remain in a *Draft* status.
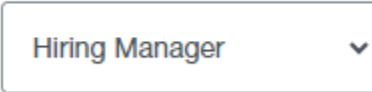
REVIEW THE STATUS OF A POSITION REQUEST

Below are instructions regarding how Department Administrators, Hiring Managers or other workflow Approvers can review the status of a Position Request.

User Group

Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is location in the upper right area of PeopleAdmin.
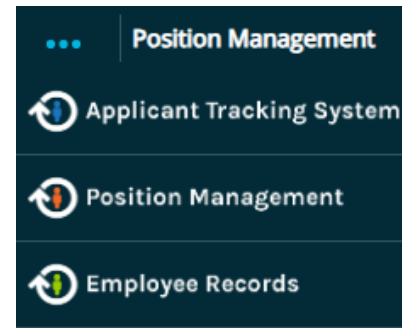

Position Management View

To review a Position, you will need to select "Position Management," which is in the upper left pane of PeopleAdmin. Once selected, the orange banner will appear, as shown below.

a. Select the "Position Descriptions" and choose the "Staff Position Requests" option. The information will show requests made to backfill a Position or requesting changes.
b. View the "Position Requests Workflow State" section for information about the desired Position.

Note: If a *Position Request* is in a *Draft* Workflow Status, click on the title or hover over the *Actions* item to select the *View* or *Edit* option that allows updating. Once edits are made, you can hover over the "Take Action on Position Request" to select the next Workflow Action (i.e., *Approve: Send to Department Head (move to Department Head*).
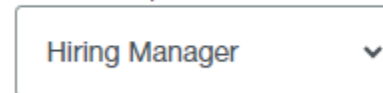
REQUEST A POSITION MODIFICATION

Below are the steps you can complete to successfully submit a request to update a Job Description for a Position that reports to you. This includes requests to replace an employee, update a Position Description, complete an equity/salary review, promotion, etc.

User Group

Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the *"User Group"* section that is in the upper right area of PeopleAdmin.
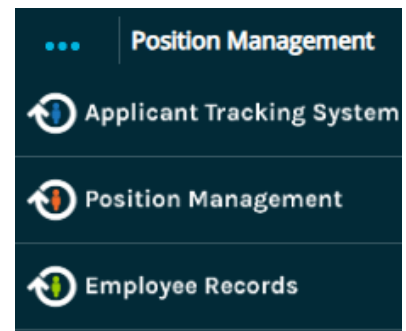
Position Management View

To review a Position, you will need to select "Position Management," which is in the upper left pane of PeopleAdmin. Once selected, the orange banner will appear, as shown below.

Job Description Modification Steps

a. To begin, choose the "Position Descriptions" section and select "Staff." Review the results, select the title of the desired Position.

b. On the right side of the page, select "Modify Position Description." A warning notification will appear. Select "Start" if you approve of actions listed in the message.

c. Add the Classification details within the **Classification Selection**. If the classification is unknown, select **TBD Lakeside** or **TBD HSC**.

d. Within the **Position Details** page, enter in the necessary information. If necessary, you may need to select "control" when choosing multiple choices within a dropdown list.

e. The **Position Budget Information** section is required. Add the applicable details.

f. The **Supervisory Position** page is prefilled. You can change the Supervisor by selecting "Filter These Results." If the Supervisor cannot be found, notify your Human Resources Manager.

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g. **Supplemental Questions** may be added. You can choose a question from the list or select "Add a Question." If the latter is chosen, enter in the desired information.
Note – Human Resources needs to approve the new question(s) prior to posting.

h. For the **Position Documents** section, you may add supporting PDF materials such as an organizational chart by hovering over the "Actions" option that is located on the right side of the page.

i. The **Required Documents** tab allows you to select the required documentation that must be provided by the Applicant when applying for the Position.

j. Update the **Reference Letters** section to list "No." This selection will keep the current practice of checking references manually.

k. Lastly, in the **Position Request Summary** section, review the information. If necessary, you can make edits to the desired section.

Note: You may add the Position to your "Watch List" by selecting the "Add to Watch List" option in the upper right section.

Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Position Budget Inform...
- ✓ Supervisory Position
- ✓ Supplemental Questions
- ✓ Position Documents
- ✓ Required Documents
- ✓ Reference Letters
- Position Request Summary

l. If no further edits are necessary, hover over the "Take Action on Position Request" to select the next Workflow Action (i.e., *Approve: Send to Department Head (move to Department Head)*.

REVIEW APPLICATIONS FOR A POSITION

If you are a Department Head, Hiring Manager, or part of a Search Committee, you can review all applications that were submitted for a Position as outlined in the instructions below.

User Group

Select the "Hiring Manager" option (or other applicable option other than "Employee") within the "User Group" section that is in the upper right area of PeopleAdmin.

Applicant Tracking System View

To review a Position, you will need to enter the "Applicant Tracking System" module of the system. To do so, select the "..." located in the upper left corner of PeopleAdmin and choose "Applicant Tracking System." Once selected, your screen will have a blue banner across the top as shown below.
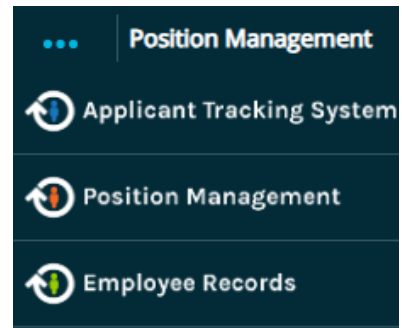
Applicant Review Steps (Individual Applicant)

a) Select "Postings" and choose "Staff." Select the desired Position and choose the "Applicants" tab.
b) Select the Applicant to view their application materials submitted for the Position.
c) To access the Posting the Applicant applied to and/or preview the Applicant's Application, choose the option to "View the Posting Applied to" or "Preview Application" options.
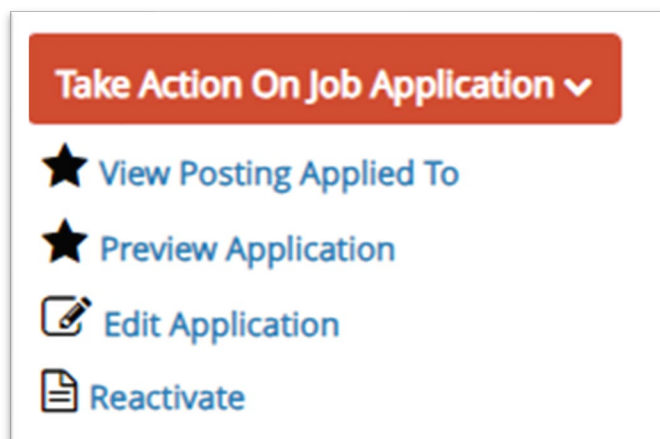
REVIEW APPLICATIONS FOR A POSITION (CONTINUED)

Applicant Review Steps (Multiple Applicants)

a) Select "Postings" and choose "Staff." A list of results may appear, or you may need to enter in desired information in the "Search" section.
b) Once you find your desired Position within the search results, select the title from the "Working Title" column.
c) Upon selection, you can view the application materials submitted for a Position. You will have the option to view all the Applicants that applied for the Position.

a) Once the Applicant is selected from the Applicants tab, hover over the "Actions" section to view their Application.
b) If desired, you can select the option to view the Posting the Applicant applied to and/or preview the Applicant's Application.
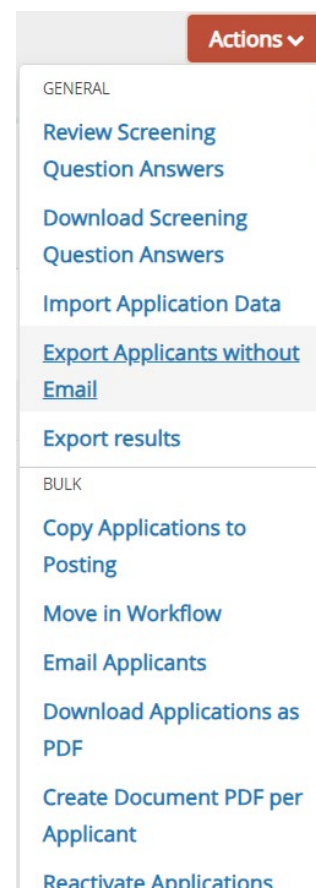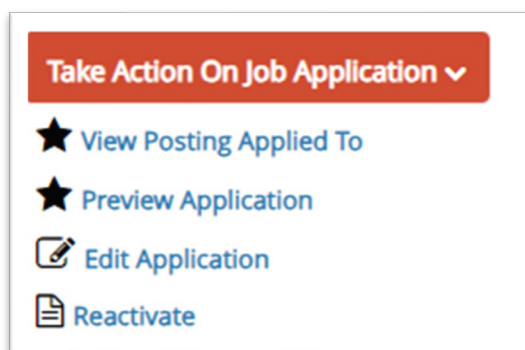
Note – within the same tab, you may also access a variety of "General" and "Bulk" actions (such as reviewing Applicant's responses to screening questions or downloading all Applications for a Position) from the "Actions" menu as shown on the right.

MOVE APPLICANTS TO A NEW WORKFLOW STATUS

If you are an Applicant Reviewer, you can move Applicants to a new workflow status as outlined in the instructions below.

User Group

Select the "Applicant Reviewer" option within the "User Group" section that is in the upper right area of PeopleAdmin.

User Group:

Hiring Manager

Applicant Tracking System View
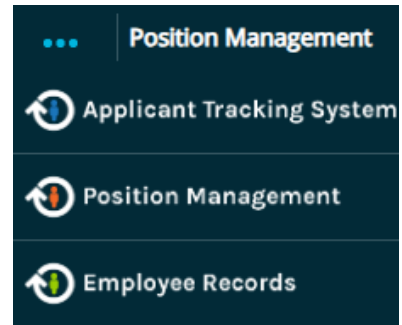
To access Applicant materials for a Position, you will need to select "Applicant Tracking System," which is in the upper left pane of PeopleAdmin. Once selected, the blue banner will appear, as shown below.

Position Management

Applicant Tracking System

Position Management

Employee Records

| Home | Postings ▾ | Applicants ▾ | Hiring Proposals ▾ |

Applicant Review Steps (Individual Applicant)

Take Action On Job Application ▾

Keep working on this Job application

WORKFLOW ACTIONS

MOVE DIRECTLY TO...

a) Select the "Applicants" option to choose "Applicant Search."

b) You may enter the name of the Applicant in the Search section or select the individual from the list of Applicants that are available in the results.

c) Upon selection, you can view the application materials submitted for a Position.

d) If desired, you can select the "Take Action on Job Application" option to move the Applicant's Application to the appropriate workflow location (i.e., *Under Review by Hiring Manager*).

Draft

Under Review by Hiring Manager

Under Review by Dept / Committee

Under Review by HR

Selected for Phone Interview

Selected for 1st Interview

Selected for 2nd Interview

Recommend for Hire

References Received

System Det'd Did Not Meet Min Quals

Not Interviewed Not Hired

Interviewed, Not Hired

Not Interviewed, Not Hired (Internal)

Interviewed, Not Hired (Internal)

Withdrawn

Alternate Finalist

Special Handling List

Position Canceled

Offer Declined

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MOVE A GROUP OF APPLICANTS TO A NEW WORKFLOW STATUS

If you are an Applicant Reviewer, you can move a group of Applicants to a new workflow status as outlined in the instructions below.

User Group

Select the "Applicant Reviewer" option within the "User Group" section that is location in the upper right area of PeopleAdmin.
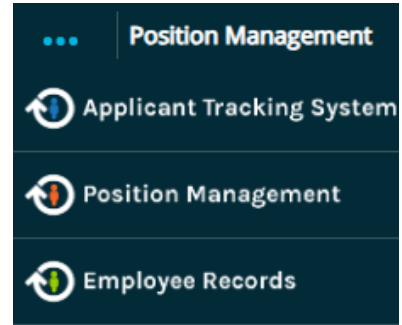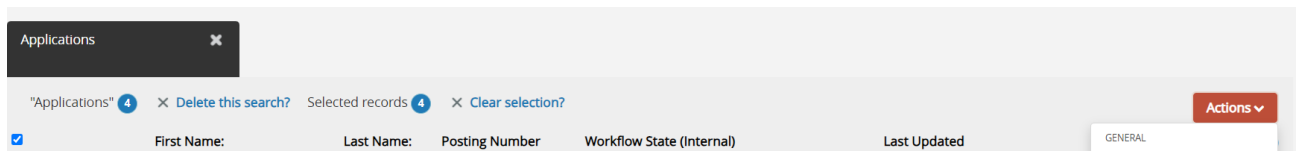
User Group:

Hiring Manager

Applicant Tracking System View

To access applicant materials for a Position, you will need to select "Applicant Tracking System," which is in the upper left pane of PeopleAdmin. Once selected, the blue banner will appear, as shown below.
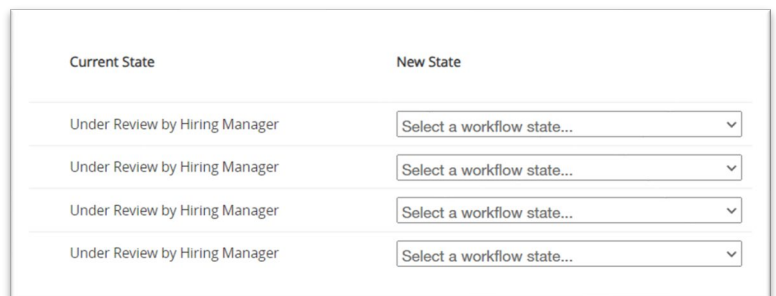
Position Management

Applicant Tracking System

Position Management

Employee Records

| Home | Postings ▾ | Applicants ▾ | Hiring Proposals ▾ |

Applicant Review Steps (All Applicants)

a) Select "Postings" and choose "Staff" to locate the desired posting.
b) Once the Posting is selected, choose the "Applicants" tab. Select the box to the left of the Applicants you want to disposition or if you would like to select all Applications you can select the first box to the left of the "First Name" column.

Applications	✕					
"Applications" 4 ✕ Delete this search? Selected records 4 ✕ Clear selection?						Actions ✔
☑	First Name:	Last Name:	Posting Number	Workflow State (Internal)	Last Updated	GENERAL

c) Choose *"Actions"* to select the "Move in Workflow" option.
d) The option to select the "New State" becomes available for the Applicant in addition to "Reason" (if applicable).

Current State	New State
Under Review by Hiring Manager	Select a workflow state...
Under Review by Hiring Manager	Select a workflow state...
Under Review by Hiring Manager	Select a workflow state...
Under Review by Hiring Manager	Select a workflow state...

e) Select "Save Changes" and the Applicants will move into the new workflow state. Sometimes it can take a couple of minutes for the changes to show in the Applicant list. Usually, if you press *Refresh*, the list will update. Note: You will need to select Applicants who are in the same workflow state originally to mass disposition them. If they are in different states when you select the Applicants, you will have chosen a new state for each person individually.

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ACCESS AN APPLICANT'S REFERENCES (FACULTY POSTINGS)

If you are a Department Head, Hiring Manager, Applicant Reviewer, or part of a Search Committee, you can access the Applicant's references outlined in the instructions below.

User Group
Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is location in the upper right area of PeopleAdmin.

Applicant Tracking System View
To access Applicant materials for a Position, you will need to select "Applicant Tracking System," which is in the upper left pane of PeopleAdmin. Once selected, the blue banner will appear, as shown below.
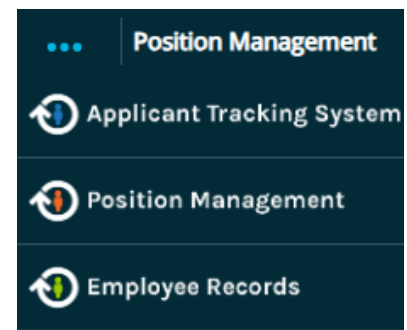
Access An Applicants References Steps

a) Select "Applicants" and choose "Staff Applicants."
b) Search for the Applicant. Once the Applicant is selected, within the "Summary" tab, scroll down to view the "References" section.

Note: If applicable, on the "*Recommendations*" tab, you can view the "Reference Requests" section (i.e., to confirm if responses were provided by the References).

REVIEW A JOB POSTING

If you are a Department Head, Hiring Manager, Applicant Reviewer, or part of a Search Committee, you can review the Job Description for the Posting as outlined in the instructions below.
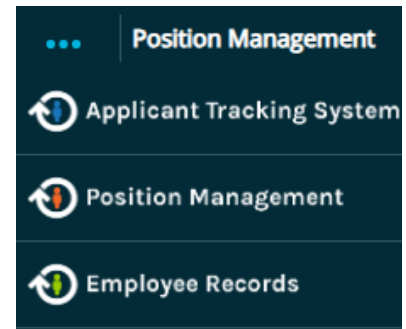
User Group

Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is location in the upper right area of PeopleAdmin.

Applicant Tracking System View

To access Applicant materials for a position, you will need to select "Applicant Tracking System," which is in the upper left pane of PeopleAdmin. Once selected, the blue banner will appear, as shown below.

Job Description Review Steps

a) Select "Postings" and choose "Staff."
b) Search for and select the desired Position.
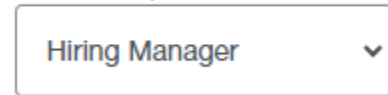c) The Posting includes the "Position Details" on the "Summary" tab.

SAVING AND LOCATING A SEARCH RESULT
(APPLICANT TRACKING SYSTEM SECTION)

Below are instructions on how to save a custom search for Applicant/Posting related information within the Applicant Tracking System section of People admin.

User Group
Select the "Hiring Manager" option (or applicable option that is not the "Employee" choice) within the "User Group" section that is location in the upper right area of PeopleAdmin.
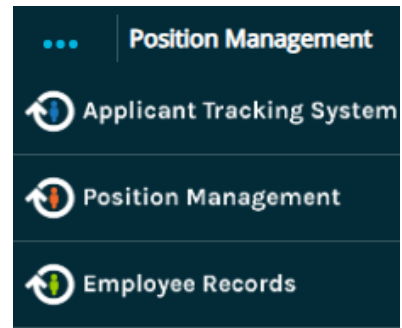
User Group:

Hiring Manager ⌄

Applicant Tracking System View
To access Applicant materials for a position, you will need to select "Applicant Tracking System," which is in the upper left pane of PeopleAdmin. Once selected, the blue banner will appear, as shown below.

... Position Management

⟳ **Applicant Tracking System**

⟳ **Position Management**

⟳ **Employee Records**

| Home | Postings ▾ | Applicants ▾ | Hiring Proposals ▾ |

Saving and Locating a Search Result

a) Select "Postings" and choose "Staff" to view your postings.
b) Enter your preferred search criteria in the Search box and/or the "More Search Options" area. Select "Search."
c) Scroll down to the grey portion. Choose the "Save this search?" option, as shared below. Enter/select the desired information and select "Save this Search."

   Note – If you select "Actions," you can select the "Export results" option to receive a spreadsheet reflecting the entirety of the *Search* results.

| Ad hoc Search | ✖ | Postings |

Ad hoc Search (225) Save this search? Selected records (0) ✕ Clear selection?   **Actions ⌄**

← Previous 1 2 3 4 5 6 7 8 Next →

d) To access the search result in the future, repeat step "a)" above. Then select the "Saved Searches" menu to locate the preferred information and choose "Search."
e) When the information appears, you may select the "Delete this search?" option to remove the saved search. If you proceed, you may receive a prompt to confirm your choice to delete the saved search.

SAVING A SEARCH RESULT
(POSITION MANAGEMENT SYSTEM SECTION)

Below are instructions on how to search for position related information within the Position Management System section of People admin.

User Group

Select your correct "User Group" within the "*User Group*" section that is in the upper right area of PeopleAdmin. Please note: the "Employee" "User Group" is not an applicable choice.
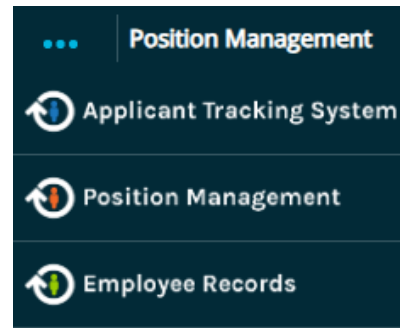
User Group:

Hiring Manager

Position Management View

To review a Position, you will need to select "Position Management," which is in the upper left pane of PeopleAdmin. Once selected, the orange banner will appear, as shown below.

••• **Position Management**

Applicant Tracking System

Position Management

Employee Records

Home   Position Descriptions ▾   Classifications ▾

Saving a Search Result

a) Select "Position Descriptions" and choose "Staff" to locate the desired Position.
b) Enter your preferred search criteria in the "Search" box and/or the "More Search Options" area. Select "Search."
c) Scroll down to the grey portion. Choose the "Save this search" option, as shared below and provide a name to your saved search so you can easily access the search criteria in the future. If you'd like this to be your "default" search, please select the "Make it the default search" option and select "Save this Search."

Ad hoc Search   ✖   Postings

Ad hoc Search **225**   Save this search?   Selected records **0**   ✖ Clear selection?   Actions ⌄
← Previous **1** 2 3 4 5 6 7 8 Next →

Note – During step "c)" above, if you select "Actions," you can select the "Export results" option to receive a spreadsheet reflecting the entirety of the search results.

d) To access the search result in the future, repeat step "a)" above. Then select the "Saved Searches" menu to locate the preferred information and choose "Search."
e) When the information appears, you may select the "Delete this search?" option to remove the saved search. If you proceed, you may receive a prompt to confirm your choice to delete the saved search.

WATCH LIST

If you added a Posting, Hiring Proposal, and/or Position Request to your Watch List, the information can be accessed within the "Watch List" section that is available at the bottom portion of the "Home" view on the *Applicant Tracking System* or *Position Management* pages.

Watch List	Postings	Hiring Proposals	Position Requests 1

SEARCH

Unwatch Postings

There are no results to be displayed.

APPENDIX

PeopleAdmin Application Features

1. A "Watch List" feature displays items you bookmarked regardless of the current owner.

2. A "Mailbox" feature displays active items assigned to you or your groups.

3. Building Job Descriptions with a wizard tool designed to provide helpful hints.

4. Easily access Applicant demographic information allowing for streamlined communication.

5. Easier process to attach documents such as resumes and transcripts.

6. Easily compile and summarize equal employment opportunity and diversity-related data. Subsequently, we can create strategic Talent Management strategies designed to create and foster a diverse and inclusive environment comprised of various personal and professional experiences.

7. "Key Word" searching within postings.

8. Mobile-friendly access, including updating Applications and Positions.

9. Onboarding repository designed to house helpful orientation information for new Faculty and Staff members to become acquainted with LUC.

10. PeopleAdmin 7.6 automatically logs a history of what data was changed, when, and by whom within the "History" tab.

11. The system provides simple, intuitive navigation.

12. Simplified interface designed to allow for easily uploading Application materials (i.e., Resumes and/or Letters of Recommendation).

13. User-friendly display for Applicant to see a full list of Positions they've applied for within PeopleAdmin 7.6.

14. Utilize the web browser's "back" button to revert to previous pages.