



PageUp User Guide

Contents

- Description 4
- Website information 4
 - Employee Login 4
 - Careers websites (Job Postings) 4
 - Applicant Login..... 4
 - Login information 4
 - Permissions 4
- General guidelines for using PageUp 4
- Menus..... 5
- Field types 5
 - Mandatory fields 5
 - Lookup or Binoculars fields 5
 - Lists of information 5
- Navigation 5
 - Navigating between pages of information..... 5
 - Navigation functions at a glance 6
 - Navigate between pages..... 6
 - Showing or hiding columns 6
 - Changing the number of records displayed per page 6
 - Showing all records 7
- Position Description – Creation and approval 8
 - Creating a New Position Description for a job 8
 - Users and Approvals..... 10
 - Adding a note or documents to a job description 12
 - Update an Approved Position Description..... 12
- Recruitment..... 14
 - Recruit for a position..... 14
 - Adding a note to a requisition..... 14

Position Management.....	16
Recruit for Multiple Positions with the same job description	17
Completing the Requisition.....	18
Waiver for posting.....	19
Funding Source, Percentage and Speedtype	20
Search Committee.....	20
Selection Criteria	22
Posting Details.....	22
Users and Approvals on a Requisition.....	23
Saving and Submitting the Requisition	24
Approving a job	25
Declining a job.....	25
Restart an approval process.....	25
Assigning a different approver	25
Job Requisitions – Searching and Managing	26
Searching for jobs via manage jobs.....	26
Sorting jobs.....	26
Manage Applicants.....	26
Navigating to the applicants	26
Viewing an applicant’s resume and application form.....	27
Viewing an applicant card	28
Changing the Applicant Status	30
Disposition of Unsuccessful Applicants / Candidates (Reason for Non-Selection).....	31
Applicant history section.....	33
Managing applications - Bulk activities	33
Bulk categorize	33
Bulk communication.....	34
Bulk compile and send	34
Bulk move.....	34
Bulk move and send	34
Bulk task/reminder.....	35

Bulk selecting applicants within a job	35
Communicating with candidates specific to a job application.....	35
Making an offer	37
Application status move to Reference Check	37
Application status move to Prepare Offer	37
Complete offer details.....	38
Offer Documents.....	39
Approving offers.....	40
Approving an offer	40
Declining an offer	40
Restart an approval process.....	40
Closing jobs.....	41
Updating the job status.....	41
Managing applicants in a current statuses	41
Notify agency of job closure.....	41
Dashboard	42
Display a recruiter’s jobs on the dashboard	42
Job information link – access to the job.....	42
Job information link – access to the applicants	42
Create a task for yourself	42
Assign a task to another user	42
View assigned task details from Dashboard	42
Roles within PageUp	43
Position Description field Roles.....	43
Requisition field roles.....	43
Offer Card field roles.....	44
Revision History.....	45

Description

PageUp is an online solution for managing the recruiting process for all employee hires (benefited/non-benefited) within the President's Office. Should you have any questions regarding the recruitment process, please contact Matt Wamback in Human Resources at mwamback@umassp.edu or HRPO@umassp.edu.

Website information

Employee Login

- President's Office:
 - URL: <http://umass.pageuppeople.com>

Careers websites (Job Postings)

- President's Office: <http://careers.umassp.edu>
- Main Site: <http://careers.massachusetts.edu>

Applicant Login

- President's Office:
<https://secure.dc2.pageuppeople.com/apply/822/presidentsoffice/applicationForm/default.asp>
- Main Site:
<https://secure.dc2.pageuppeople.com/apply/822/applicationForm/default.asp>

Login information

1. <http://umass.pageuppeople.com>.
2. From the login screen, enter your campus ID and password.
For Boston, Dartmouth, Lowell and President's Office users, select your campus from the dropdown list.
3. Select to login

Permissions

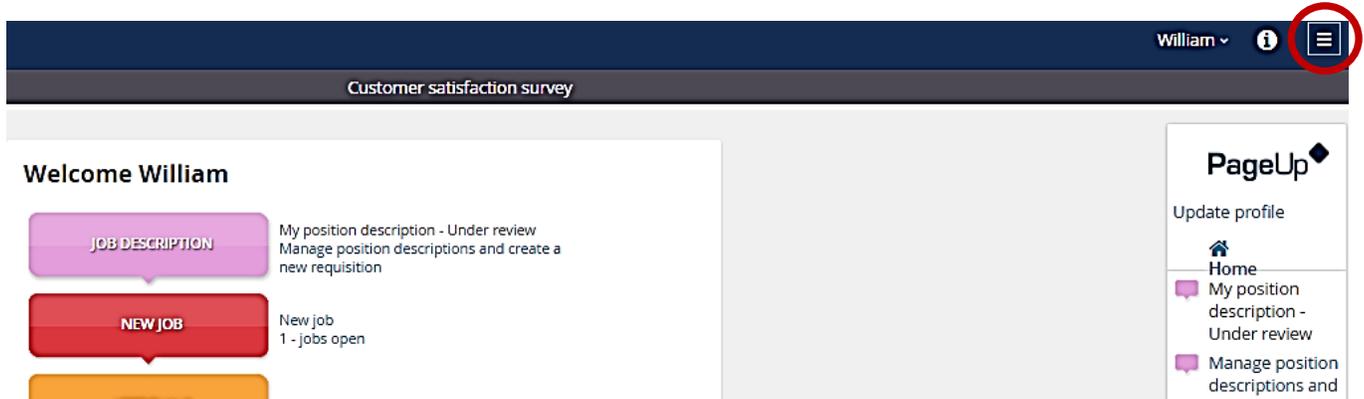
Based on the permissions that you have been granted in PageUp, not all features/functions described in this document may be available to you. Please see email HRPO@umassp.edu, if any questions.

General guidelines for using PageUp

- **Do not use** the **Back** button in your browser to go back to the previous page, as your session will be interrupted and you may lose your changes.
- Your session will timeout after **120 minutes** of inactivity.
- Do not share your login details with any other person.

Menus

To view or hide the right-side Dropdown menu, select the menu icon in the upper, right corner



Field types

Fields in PageUp 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 centers, 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.

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.

Navigation

Navigating between pages of information

When too many results are returned to display on a single page, PageUp provides a number of navigation options (see below)

Navigation functions at a glance

Columns can be resized by hovering and dragging the column header border.

Quick page navigations is provided at the top of the list

<input type="checkbox"/>	Job Number	Recruiter	Status	Title	Date entered	Applications	
<input type="checkbox"/>	512166	DR	Sourcing	Customer Service Consultant*	29 Apr 2009	47	
<input type="checkbox"/>	512357	KL	Approved	Human Resources Officer	1 Oct 2010	24	
<input type="checkbox"/>	512175	DR	Offer	APAI Scholarship - Faculty of Science	26 May 2009	22	
<input type="checkbox"/>	512170	GR	Sourcing	Account Manager	30 Apr 2009	19	
<input type="checkbox"/>	512152	GR	Offer	Implementation Coordinator	7 Apr 2009	17	
<input type="checkbox"/>	512406	RHR	Screening	YP Workforce Planning	1 Sep 2011	12	
<input type="checkbox"/>	512146	KR	Sourcing	Graduate Engineering - South Australia	24 Mar 2009	11	
<input type="checkbox"/>	512195	DR	Sourcing	MINE Lead Field Mechanical Engineer	24 Jun 2009	9	
<input type="checkbox"/>	512392	DR	Approved	Senior Staffing Advisor	12 Jul 2011	9	
<input type="checkbox"/>	512402	SR	Sourcing	Senior Mining Engineer	25 Aug 2011	9	
<input type="checkbox"/>	512242	DR	Pending	Senior Administration Assistant	16 Oct 2009	6	
<input type="checkbox"/>	512409	RHR	Approved	Employee Benefits Specialist	1 Sep 2011	6	
<input type="checkbox"/>	512215	KR	Approved	.Net Developer	26 Aug 2009	5	
<input type="checkbox"/>	512204	SP	Approved	Contractor	9 Jul 2009	4	
<input type="checkbox"/>	512238	GR	Pending	Account Manager	12 Oct 2009	3	
<input type="checkbox"/>	512326	CR	Approved	Account Manager	26 Jul 2010	3	
<input type="checkbox"/>	512220	DN	Approved	Account Manager	9 Sep 2009	1	
<input type="checkbox"/>	512298	GR	Pending	Account manager	12 Apr 2010	1	
<input type="checkbox"/>	512321	JR	Interviewing	Account Manager -CN	18 Jun 2010	1	
<input type="checkbox"/>	512341	NF	Approved	Account Manager Referral	16 Aug 2010	1	

Page 1 of 2 Show all records Jump to page: Records 1 to 20 of 24

Page navigation allowing you to jump to the start or the end of the list with one click

Clicking here will return all records from all pages (max 500)

Jump directly to any page in the results

The settings button allows you to customise the columns displayed in the list, and to change the number of records displayed per page

Navigate between pages

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

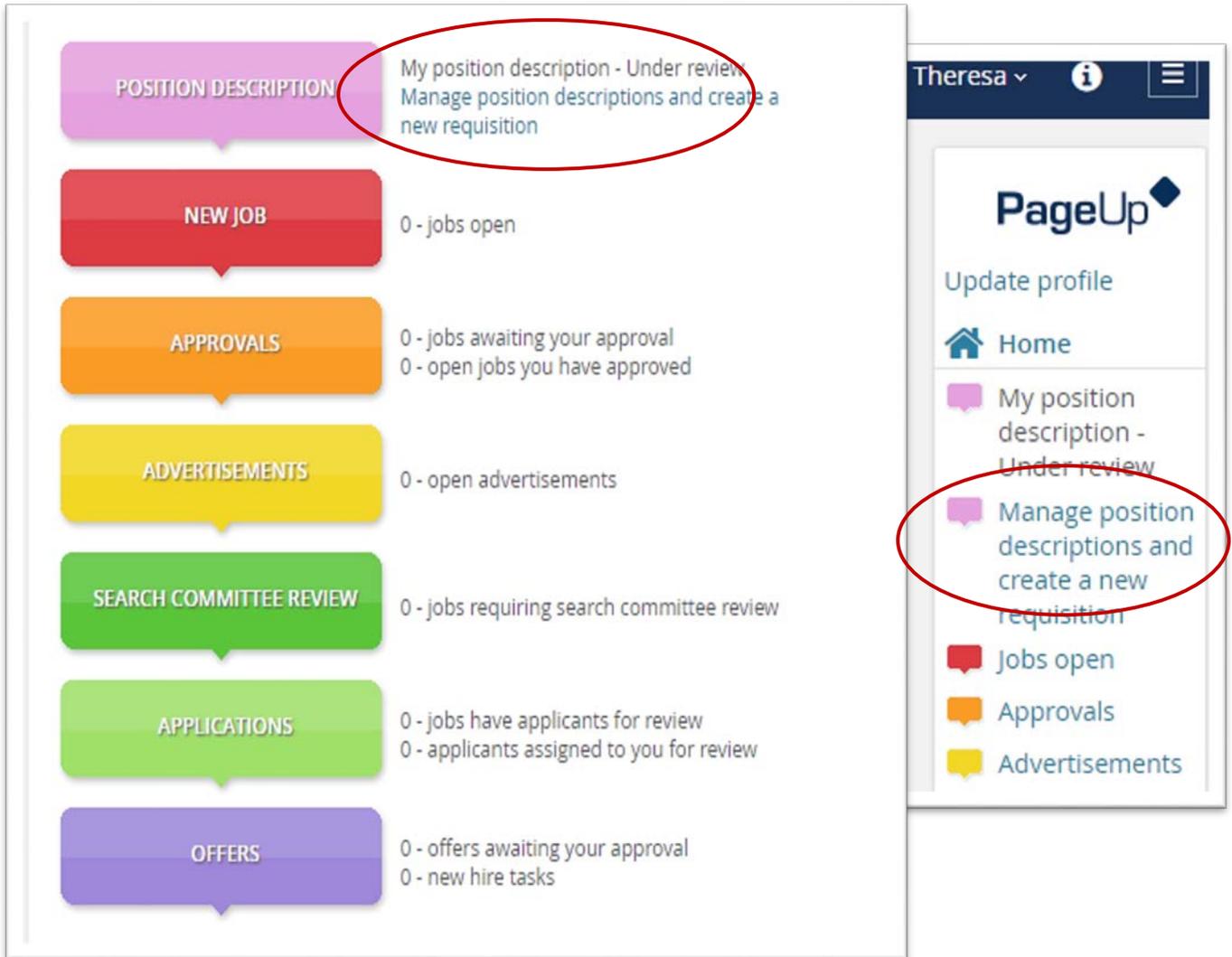
Note: A maximum of 500 records will be displayed using this function

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.

Position Description – Creation and approval

Creating a New Position Description for a job

Click **Manage Position Descriptions** and create a new requisition in your Bubble Menu or in the Dropdown Menu



You have the option to create a **New Job Description**, or **Edit/View/Recruit** for position, from an already approved job description.

The screenshot shows a web application interface for managing position descriptions. At the top, there are navigation tabs for 'Jobs' and 'People', with 'New Position Description' highlighted and circled in red. Below this is a form titled 'Position Description' with various input fields: PD No., Position Title, Reason for waiver, Position Number, Role Number, Employee Name, Employee No., Supervisor Name, Work Type (dropdown), Area (dropdown), Department (dropdown), Sub department (dropdown), Approval status (dropdown), and Status (dropdown). There are 'Clear' and 'Search' buttons. Below the form is a table with the following data:

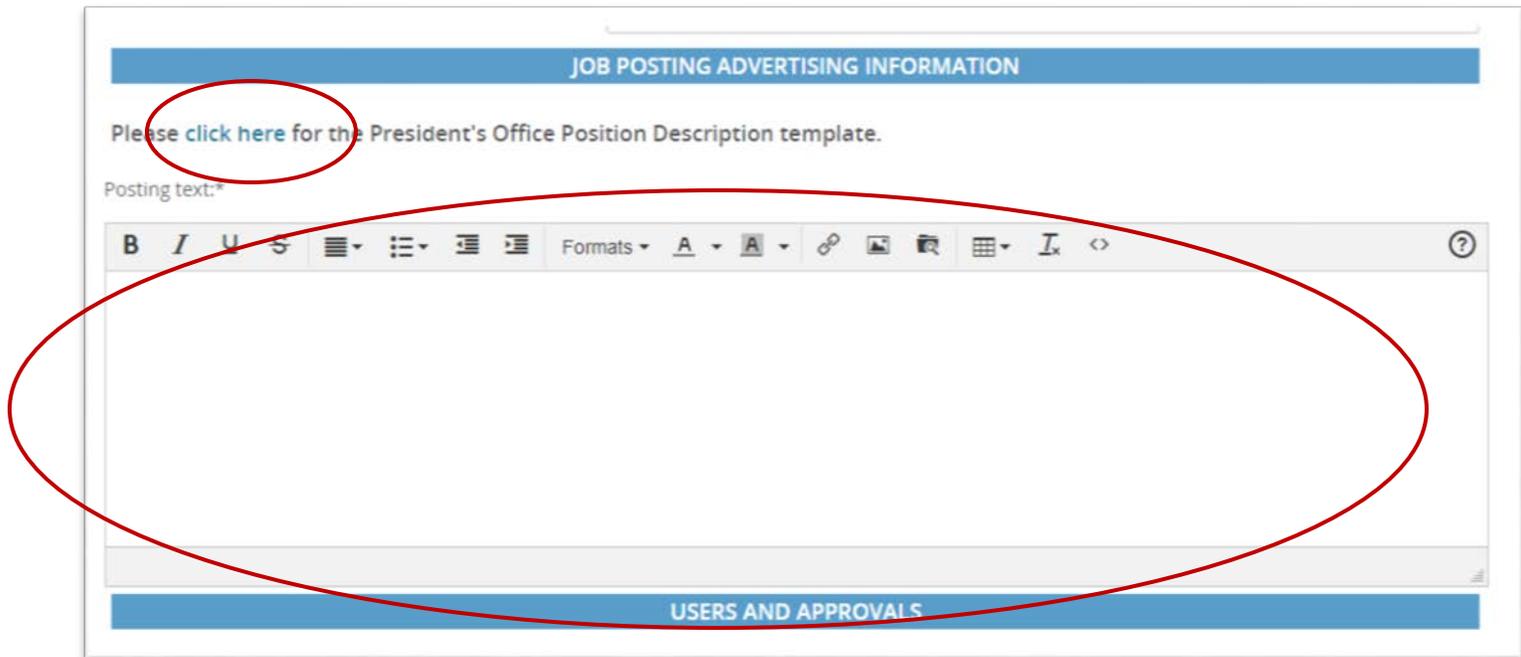
PD No.	Position Title	Reason for waiver	Position Number	Role Number	Employee Name	Supervisor Name	Date modified	Approval status	
PD-45	Career Specialist brockton career works		00027949				7 Jun 2017	Approved	Edit View Recruit for position Archive

First verify that the Position Description does not exist by searching for the Position number or Title. If a Position Description does exist please select it and choose Recruit for Position. Instructions for recruitment can be found here: [Recruit for Position](#).

Once you verify that a Position Description does not exist, select **New Position Description** within the **Manage Position Description** screen. You will then be brought to a blank Position Description.

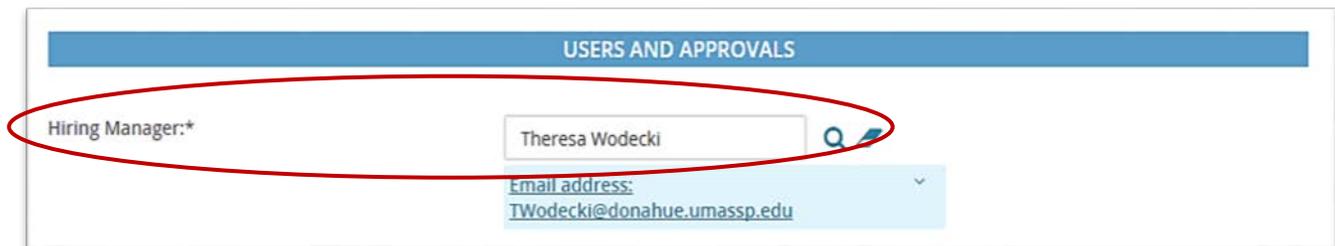
In **Type of Action Requested**, select **New Position**, then choose your campus and then department. You can now proceed with completing the Position Description template by completing all viewable fields. If a field does not pertain to your department such as Current Incumbent, in cases of a new position, please leave the field blank.

When completing the Job Posting Advertising Information, please be sure to select "Click Here" to select the President's Office Position Description Template. A new word document template should download for your use. Please follow the instructions in the document in order to copy and paste in the text box.



Users and Approvals

Whoever is completing the new job description, will have their name automatically default into the [Hiring Manager](#) field. If you are the initiator of the job description, but you are not the Hiring Manager, you should clear out your name and insert the correct Hiring Manager. The person identified in this field will also be notified when the job description has been approved by Human Resources.



In PageUp, after selecting "Univ of Mass Central Admin" in the Campus drop down menu at the beginning of the Position Description, the approval process will default to Blank.

Approval process:* Blank

1. Click above to select your approval process:

🔍 ✎

No user selected.

You should select the appropriate approval process from the drop down field. Should a name not prepopulate into the approval field(s) you are able to add a name from the address book by clicking on the magnifying glass icon. If there is a prepopulated name, and it's not the correct name for your department, you are able to use the eraser icon to insert a different name. Note: Approvals may have more than one approver. Should you need additional approvers added for your department, please contact Human Resources.

The final approval on all job descriptions will be Human Resources. HR will also be responsible for assigning a position number to the position as well. Once the job description is approved, the department can recruit for that position. **Job Description approval notifications will be sent to whomever is identified as the Hiring Manger.**

In the Human Resources Box, please type HRPO@umassp.edu

Human Resources:* Human Resources President's Of

🔍 ✎

Email address: HRPO@umassp.edu

Adding a note or documents to a job description

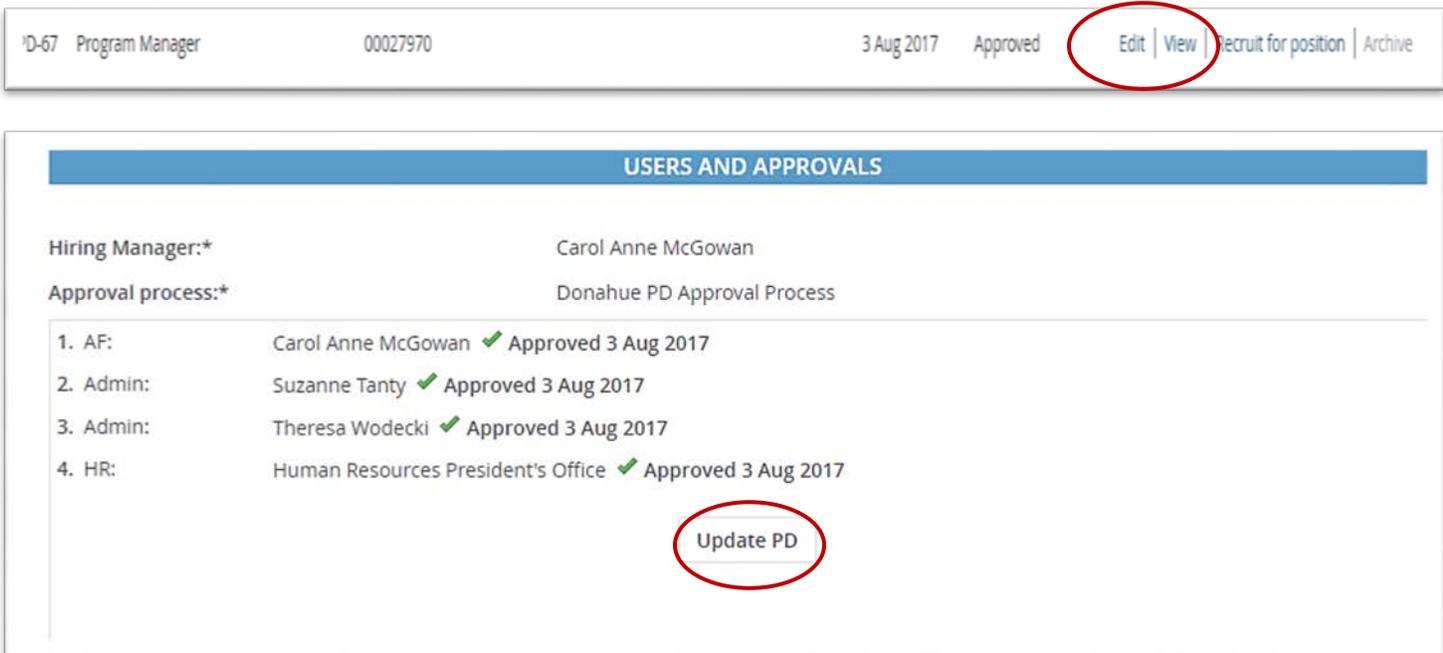
From the Position Description, click the Notes or Documents tab, Add a note or document, and then click on Save. The item will be time and date stamped with your user name. The notes tab and document section are great ways to record extra information about the Position Description. Both tabs are visible by all users in the system. Please use discretion! These items will become part of the permanent hiring record.



Once the Position Description is complete, hit Submit to start the Approval workflow. You won't be able to review the Position Description until it is approved.

Update an Approved Position Description

To update or edit an approved Position Description select Edit, then scroll to the User and Approval Section of the PD and select "Update PD"



After selecting Update PD, be sure to select either "Update Position Description to Post" or "Update Position Description (no posting)"

Type of action requested:

Campus:*

Department:

Posting Title:*

Current Incumbent/Previous Incumbent:

Select

Select

New position

Update Position description to post

Reclassification

Update position description (no posting)

Recruitment

Recruit for a position

Before recruiting for an approved Position, you should familiarize yourself with certain [Roles](#) found within the Requisition. [Terms](#) are found at the end of this document.

From the Bubble Menu of the **Dropdown Menu**, chose **Manage position descriptions and create a new requisition**. You will be directed to a page to search for the **Position Description**. Enter a Position Number, Position Title or Employee Name (if replacing) and select **Search**.

The screenshot shows a web interface for searching Position Descriptions. At the top, there are tabs for 'Jobs' and 'People'. Below is a 'New Position Description' section with a 'Position Description' heading. The form contains several input fields and dropdown menus: PD No., Position Title, Reason for waiver, Position Number, Role Number, Employee Name, Employee No., Supervisor Name, Work Type (set to 'All'), Area (set to 'Univ of Mass Central Admin'), Department (set to 'All'), Sub department (set to 'All'), Approval status (set to 'All'), and Status (set to 'Active'). There are 'Clear' and 'Search' buttons. Below the form is a table with columns: PD No., Position Title, Reason for waiver, Position Number, Role Number, Employee Name, Supervisor Name, Date modified, Approval status, and Action. The first row shows 'PD-45 Career Specialist brockton career works' with '00027949' in the Position Number column, '7 Jun 2017' in Date modified, and 'Approved' in Approval status. The Action column for this row contains 'Edit | View | **Recruit for position** | Archive', with 'Recruit for position' circled in red.

If your search does not reveal the Position Description that you are looking to recruit for, please create a new Position Description by following the steps [above](#). You cannot recruit for a Position without a Position Description.

If you find the Position you are recruiting for, select **recruit for position**. The system will direct you to the **Requisition Information** page in the system. A large portion of the details populated in the **Position Description** will transfer to the **Requisition card** and will be “read only”. All items on the **Requisition** should be completed that are not populated from the **Position Description**. If a field does not pertain to your department such as Current Incumbent in cases of a new position, please leave the field blank.

Should you need to make a change to a Read Only item, you will need to edit the already approved **Position Description** and wait for it to be **approved** again. Any changes should also be noted within the **Notes** tab of the new **Position Description**.

Adding a note to a requisition

From the requisition, click the Notes tab, Add a note, and then click on Save. The note will be time and date stamped with your user name. The notes tab is a great way to record extra information about the Position Description. Note tabs are visible by all users in the system. Please use discretion! These notes will become part of the permanent hiring record.



Position Management

Each new **Requisition** must contain an approved job description and an open position to be hired against. The system refers to this as **Positions**. A count of 1 will default when recruiting from a currently approved **Position Description**. In the **Position No** search field you should copy and paste the Position Number found in the Blue Box above and then hit tab. A Blue Box under the Position No will populate and the information should mirror the Blue Box above.

The screenshot displays the Position Management interface. At the top, the 'Position number:' field contains 'Assistant Director' and is circled in red. Below it, a blue box lists details for '00028205 Assistant Director', including campus, department, and job code. The 'Department:' field is 'PO-Human Resources'. A section titled 'NUMBER OF POSITIONS' asks to select the amount of positions required (New or Replacement). Below this, there are input fields for 'New' and 'Replacement' counts, and an 'Add' button. At the bottom, a table shows a search result for 'Assistant Director' with a 'Type' dropdown set to 'New'. This search result is also circled in red.

Position no	Type	Applicant	Application status
Assistant Director	New	-	-

The Position Type you select is dependent upon whether or not there is an incumbent in the position you are hiring for. If there is no current or former incumbent and the position is a new Headcount for your department, you should select **New**. If there is not a new Headcount for your department you should select **Replacement**.

NUMBER OF POSITIONS

Select the amount of positions required: New (additional headcount) or Replacement (backfilling an existing employee)

Positions: New: Replacement:

Position no	Type	Applicant	Application status
1 Assistant Director	New	-	-

(Note: The 'New' dropdown in the table above is circled in red in the original image.)

00028205
Assistant Director
Campus: Univ of Mass Central Admin.
Department ID: C990207
Department: PO-Human Resources
Position Reports To:
Job Code: P00125
Pay Grade:
Union Code: P73Mas Unit Professional

Recruit for Multiple Positions with the same job description

Should you need to enter multiple positions for the approved Position Description you must be sure a Position Description and Position number already exist before proceeding. If a Position Number does not exist you must create a Position Description first before proceeding. Assuming the **Position Description** will be the same, you can view the already **Approved Position Description** and then select **Copy Position Description**.



Once you select **Copy position description** you will be brought through the Position Description Approval process at which time a **Position Number** will be assigned by Human Resources.

To recruit for multiple positions enter the number of **Positions** in as a new position or as a **Replacement** position. Once you enter the amount of Positions you are hiring against for the **Position Description**, you must click **Add**.

You are able to recruit for multiple positions for the same Job Description, however, *every position requires a position number*. For example, if there are 3 position numbers that need to be filled for one **Job Requisition**, you can enter the number 3 and the system will open five job slots. You will need to assign an approved **Position Number to each**

opening. As applicants are hired, the system will attach the appropriate **Position Number** and populate the applicant name and offer status. Once the final position is filled, the system will prevent additional applicants from being hired.

Position no	Type	Applicant	Application status
1 Career Specialist	New	-	-
2	New	-	-
3	New	-	-

Completing the Requisition

Continue to complete the fields on the **Requisition**. In the Position Details section, you will identify **Recruitment Process**. A drop down list will provide the choices available. You should always select **President's Office New Hires**.

The image shows a screenshot of a web form with several fields. The field 'Recruitment process:*' is circled in red. To its right is a dropdown menu with the following options: Select, Amherst - Classified, Amherst Classified, Amherst Professional, Boston Classified Staff, Boston Faculty, Boston Professional Staff, Dartmouth Faculty/Non Unit, Dartmouth Union, Kim's Professional Group, Lowell - Benefits Eligible Faculty Hires, Lowell - Benefits Eligible Faculty Hires (EOO Review Complete), Lowell - Benefits Eligible Staff Hires, Lowell - Benefits Eligible Staff Hires (EOO Review Complete), Lowell - Temporary/Adjunct Hires, and President's Office - New Hires. The 'President's Office - New Hires' option is highlighted in blue and also circled in red.

Waiver for posting

In the rare event that the hiring department is requesting a waiver of the posting process for a position, the department must indicate this on the Requisition by selecting Yes. The department must also complete the [“Posting Waiver Form”](#). Once completed, the form can be uploaded into the Documents tab. All waivers are subject to review and approval by the Office of Human Resources.

Below are examples of exceptional circumstances:

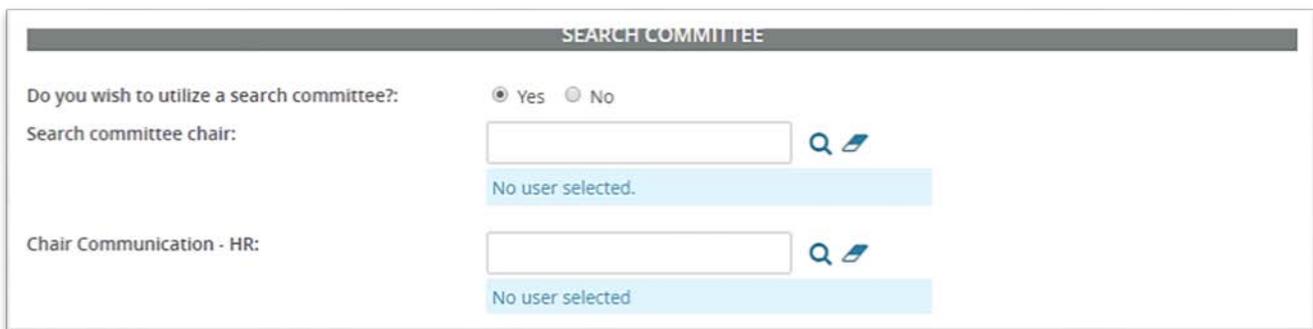
- If the position is funded by a grant or contract and the employment relationship is anticipated to be no longer than twelve (12) months in duration.
- There is an opportunity to secure a staff person on a permanent basis, independent of a specific vacancy or position, and that person has such highly specialized skills that a search would not yield as qualified a candidate.
- There is an immediate and urgent need to fill a position and the appointment has an anticipated duration of less than six months.
- A new President's exercise of their prerogatives in the initial organization of the office. That prerogative may, on occasion, be extended by the President to a new Vice President.
- The candidate is highly qualified for the position based on expertise and possesses unique skills, knowledge, abilities or experience

Funding Source, Percentage and Speedtype

If applicable on your requisition you should indicate whether this position is funded via State Funds or Grants, the primary percentage of salary dedicated to the payroll and your department's payroll Speedtype.

Search Committee

Each recruitment should have a search committee made up of at least 3 additional members (see hiring guide for details). You should select "Yes" that you would like to utilize a Search Committee. You should identify your [Search Committee Chair](#). Your **Search Committee Chair** may also be the same person identified in the [Chair Communication](#) role. If a name prepopulates into the Chair Communication role, please clear it out using the eraser. Using the magnifying glass will help you easily search for UMass employees. Please remember to allow pop-ups within your browser.



The screenshot shows a form titled "SEARCH COMMITTEE". It contains the following elements:

- A header bar with the text "SEARCH COMMITTEE".
- A question: "Do you wish to utilize a search committee?:" with two radio buttons: "Yes" (selected) and "No".
- A field labeled "Search committee chair:" with a text input box, a magnifying glass icon, and an eraser icon. Below the input box is a light blue box containing the text "No user selected."
- A field labeled "Chair Communication - HR:" with a text input box, a magnifying glass icon, and an eraser icon. Below the input box is a light blue box containing the text "No user selected."

To add search committee members, select **Add Search Committee Member**. Find the Committee Member and select **Add**. Continue to add members until done. Click the done button when finished to verify that all committee members have been added.

Search committee members:

Add Search committee member

Recipient

No Search committee member selected.

Search committee member information:

Search - Google Chrome

Secure | https://admin.dc4.pageuppeople.com/v5.3/provider/multiSearchField/searchdialog

First name: Last name: Team: Search

First name	Last name	Team	
Michael	Aaronson	D424000-HVAC	Add
Megan	Abajian	D272000-Dean Visual & Performin	Add
Kara	Abate	B011300-Nursing	Add
Lisa	Abdallah	L650600-School of Nursing	Add

Search committee member information:

No search committee member selected.

Done Add new search committee member

Selection Criteria

Here you can add selection criteria for the position. You can search for already established criteria by selecting the **Add** button or you can select the **New** button to enter in your own selection criteria. Enter your own criteria, select a category from the dropdown menu and then select **Add**. Criteria should match your predefined Minimum and Preferred qualifications. The criteria entered in this section DOES NOT prescreen an applicant. Search Committee members will be able to “rate” each applicant against the selection criteria.

SELECTION CRITERIA

Add

There are no items to show

New

SELECTION CRITERIA

Add

There are no items to show

Bachelors Degree

1. Minimum Ed

Add

Posting Details

In this section you should indicate the day and time the posting should open and close. You should indicate 8:00am for the **Open** time and 12:00am for the **Close** time. The President’s Office standard timeframe to post of job is two weeks. Should a department need more time, they should contact the Human Resources Office prior to the posting’s expiration date.

POSTING DETAILS

Open: dd mmm yyyy at 8 : 00 AM

Close: dd mmm yyyy at 12 : 00 AM

Posting Location should always be UMass President’s Office

Posting location:* Select ▼

Campus location:

Select

UMass Amherst

UMass Boston

UMass Dartmouth

UMass Lowell

UMass President's Office

Posting Summary is text that will appear on the University's Career Page, advertising the job. The text should be descriptive enough to make an applicant interested in the position.

Posting summary:

The University of Massachusetts is hiring for an accounts payable manger position

Current opportunities

Position	Location	Closes
Accounts Payable Clerk	UMass President's Office	
The University of Massachusetts is hiring for an accounts payable manager position		

The Posting Text will carry over from the **Position Description**. Should you wish to update the Text, you must edit the **Approved Position Description** and wait for that **Position Description** to be **approved** before recruiting.

[Users and Approvals on a Requisition](#)

Whoever initiated the recruitment process, their name will automatically populate into the [Hiring Manager](#) field. The Originator should put in the correct Hiring Manager's name in that field and add the Originators Name into the [Administrative Support/Originator's](#) field. The Originator should then select the appropriate approval process for their department. The Default approval process will indicate "Blank" and users will be required to enter an approval process. After selecting an approval process, names will prepopulate into the approval process, however the

Originator will have the ability to change names within the approval process. Human Resources advise you not to change the names that prepopulate unless you are aware that an individual is on vacation or a name is incorrect. Should names be updated, please contact Human Resources. Names within the sections below will all receive emails at different stages of the process. The **Hiring Manager** and **Administrative Support/ Originator** will receive an email when the Requisition has been fully approved. Once a requisition is fully approved, Human Resources will post the job.

The screenshot shows a form with four main sections:

- Administrative Support/Originator:** A search field with a magnifying glass icon and a pencil icon. Below it, a light blue box contains the text "No user selected."
- Hiring Manager:*** A search field with a magnifying glass icon and a pencil icon. Below it, a light blue box contains the text "No user selected."
- Approval process:*** A dropdown menu currently showing "Blank". This section and the search field below it are circled in red.
- 1. Click above to select your approval process:** A search field with a magnifying glass icon and a pencil icon. Below it, a light blue box contains the text "No user selected."

Saving and Submitting the Requisition

- Selecting Save a Draft can be used when you need to save the Requisition you are working on without starting the approval process.
- Submit will save and begin the approval process on your Requisition.
- Submit and Exit will save and begin the approval process and exit your screen back to the home screen.
- Cancel will exit the Requisition without saving.
- The opportunity to run a Spell Check is available and is recommended.

A horizontal bar containing five buttons: "Save a draft", "Submit", "Submit & exit", "Cancel", and "Spell check".

Hiring Managers and Administrative Support/Originators will receive an email when the requisition has been approved.

Approving a job

Users will receive an email notifying them to review and approve/decline a job. This email will have instructions on how to approve the job; you can do this either by replying to the email with the word **Approve** or you can login and do this from the **Requisition**. If on your Home page, you can access these jobs by clicking the **My job approvals** link in the right hand dropdown menu or you will see a notification in your **Bubble View**. Click **View** next to the job you are approving and review the details.



You can click through the tabs of the requisition to view attached documents and notes, if any. You can also look at History and Revision at the top of the page to see if any changes were made throughout the approval process.



If you scroll down to the bottom of the position information tab of the requisition, you will see approve and decline buttons. You will see your name as well as the names of the remaining approvers. Click **Approve**.

Any **OPEN** job that you **Approve**, you will later be able to find that job within your **Bubble View**.



Declining a job

Select **My job approvals** on the right hand menu again. Click **View** next to the job you are declining and scroll down to the bottom of the page. Click **Decline**. A pop-up requesting a reason for your decline will be displayed – this is mandatory. **Save**.

Restart an approval process

In the approval section of the requisition, click **Cancel**. A pop-up will appear requesting a reason for cancelling and restarting the approval process. Fill this in and select a new approval process.

Assigning a different approver

Depending on your permission group you may be able to assign a different approver for a particular point of the approval process. Back in the approval section of the requisition, click **Edit**. A pop-up will appear showing the

approvers for this job. If you have permission you will be able to clear a name from any box where the approver has not yet approved and add a different user.

Job Requisitions – Searching and Managing

Searching for jobs via manage jobs

Select **Manage jobs** in the right side dropdown menu or select **Job** from the top left of the screen to view and search for jobs in the system (both open and closed jobs). Access to jobs from this area is based on your permission and team settings (e.g., some users can only see their jobs; others can see team member jobs, etc)

Please note that you will only see jobs in which you have been assigned into as a Hiring Manager or Administrative Support/Originator.

Sorting jobs

Click column headings on the **Manage jobs** screen to sort on the column you have selected.

Manage Applicants

Navigating to the applicants

Depending on the role you have in the recruitment process, you will have access to review and disposition applicants to the positions you are recruiting. **Hiring Managers, Administrative Support/Originator and Communication Chairs** can change the status of an applicant for the job.

To navigate to the applicants, there are several options.

From the Home **Dashboard**, the user can access the applicants by selecting **Jobs open** from the **Bubble** or **drop down menu**.



Once directed to the open job list, the option to **View job** is displayed and should be selected

Requisition Number	Classification title	Reason for waiver	Department	Date added ▲	Status	View job
492362	Executive Assistant			10 May 2017	Offer	View job

Click on **View Job** to be directed to the Requisition Information page. Next, click on **View applications** to be directed to the applicants who have applied to the position.



The applicants will display in the following format. Columns contain pertinent information.



Viewing an applicant's resume and application form

From the **Manage applications** page you can view the resume and application form submitted by that applicant for this job. On the same line as the applicants name, on the far right you will see three icons and the words View application.

- If you click **View Resume**  this will open the resume in HTML.
- Clicking on **Download Resume**  will download the resume in the format it was uploaded.
- Click on **View Answers**  to view the application form answers.

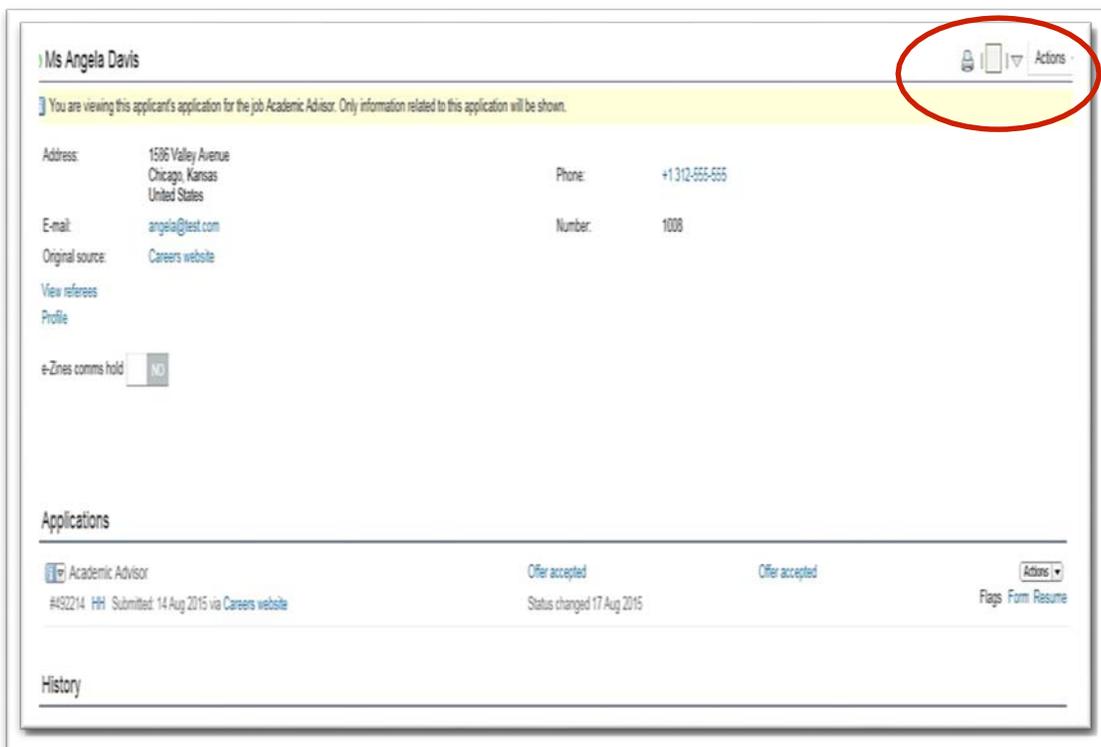
- Clicking on **View application** will open the applicant card to view all the applicants' details.

Viewing an applicant card

The applicant card describes the page that contains information about your applicants. This includes their personal details, job application information, previous history and communications, resumes and application forms, etc. Choose an applicant in the system.

1. Search for them via **Manage applications** in the right side menu. Search by your job and view your applicant. Click **View Application** to see the applicant card.

To navigate to the **Applicant card**, select **View Application**. You will now see the Applicant Card (see image below).



The first section of the **Applicant card** contains identification information. In the upper right hand corner there are three different icons. The **Printer icon**, **three check boxes** colored green, amber and red, and **up and down** arrows.



The **Printer icon** can be used to print the application card.

The series of **three check boxes** allow the reviewer to note how they would like to proceed after reviewing the applicant. Users can use the **green** box to indicate the applicant should continue in the selection process, **amber** to designate applicants who may continue but are not

the top choice, and **red** for those who should not advance in the process.



The **up** and **down** arrows allow navigation from record to record.

The second section of the **Applicant card** (under **Applications**) contains the **Position** being reviewed, the **status** the applicant, **offer status**, and any additional **Actions**. **Actions** may be accessed with the down arrow.

A screenshot of a web application interface for an applicant card. The top section shows the applicant's name, 'Ms Angela Davis', and a navigation menu with 'Actions' and a dropdown arrow. Below this is a yellow banner with a message: 'You are viewing this applicant's application for the job Academic Advisor. Only information related to this application will be shown.' The main section contains contact information: Address (1506 Valley Avenue, Chicago, Kansas, United States), Phone (+1 312-555-555), E-mail (angela@lest.com), Number (1008), and Original source (Careers website). There are links for 'View referees' and 'Profile'. A toggle for 'e-Zmes comms hold' is set to 'NO'. The 'Applications' section is circled in red and contains one entry for 'Academic Advisor' with ID #492214, submitted on 14 Aug 2015 via 'Careers website'. The status 'Offer accepted' is circled in red, along with a note 'Status changed 17 Aug 2015'. An 'Actions' dropdown menu is also circled in red, showing options like 'Flags', 'Form', and 'Resumes'. A 'History' section is visible below the applications.

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

From the **Actions** drop down menu, action can be initiated to impact the applicant. However, it is best practice to review all applicants prior to taking any specific action. **Bulk actions** will be explained in the next step.

Ms Anita Marie 46124, United States
 E-mail: anitamcarney@gmail.com Original source: Careers website

View referees
 Profile

e-Zines comms hold

Applications

Marketing Manager #492215 HHB Submitted: 22 Oct 2015 via Careers website

Phone Screen Interview Accepted
 Status changed 22 Oct 2015

No offer

Actions

- Add activity
- Add note
- Assign application
- Change status
- Compile and send
- Edit application source
- New form
- New referral
- Offer details
- View references
- Undiscover application

History

Item: All Job: All

Date & time	Item
Friday, 23 Oct 2015, 2:01am System	System changed status to " Phone Screen Interview Accepted" when applicant acc Marketing Manager
Friday, 23 Oct 2015, 1:59am Anita Carney	Status changed to 'Phone Screen Event Booking' by Anita Carney. Marketing Manager

Changing the Applicant Status

Hiring Managers, Administrative Support/Originator and Chair Commination, are permitted to change the **Status** of an applicant. This is a critical point in the applicant review process, since a **Status** change may trigger other actions within the PageUp system. Search Committee Chairs should consult with any of the above three members when they are ready to change an applicant's status. A status change can also happen when viewing all applicants on the Manage Applicants Page

Applications

Customer Relations Specialist #492349 MW Submitted: 3 May 2017 via UMass Careers Site

No
 Status changed 11 May 2017

No offer

Actions

Flags Form Resume

Permissioned users should only move applicants when appropriate and when the Search Committee has finalized their review. Applicants should not bounce through different statuses.

Disposition of Unsuccessful Applicants / Candidates (Reason for Non-Selection)

When the decision has been made to no longer move forward with the candidate, they must be moved to a status of “No”. This action should be completed by the department.

Once you make the selection and click on Next, you are taken to the Confirm status change screen. Near the bottom of the page, you will see the Status which the person has been moved to. In addition, you will need to indicate the Reason for Non-Selection from the drop down menu. Permissioned Users must select an unsuccessful status. **President’s Office employees shall only choose from the following even though more items may appear:** Position Filled, Position Cancelled, Does not meet qualification, Does not fit job requirements, Background/Reference check requirements not met, VISA requirement not met, or Ineligible. Any questions on the disposition status should be referred to Human Resources.

- Position filled
- Position Cancelled
- Does not meet qualifications
- Does not meet strategic qualifications
- Does not fit job requirements
- Background / Reference check requirements not met
- Visa requirements not met
- Medical / Police check requirements not met
- Ineligible

Once you have made the appropriate selection, click **Move Now**.

The screenshot shows a form for changing an applicant's status. At the top, it displays 'From status: Phone Interview' and 'To status: No'. Below this is a dropdown menu for 'Communication template' set to '-- No template --'. There are two blue bars with radio buttons: 'E-mail: Applicant' (Yes/No) and 'Additional users from Job' (Yes/No). A section titled 'No reason' contains a dropdown menu with 'Does not meet qualifications' selected, which is circled in red. Below this is a 'Note' section with a text area. At the bottom, three buttons are visible: 'Move now' (circled in red), 'Cancel', and 'Spell check'.

If someone was moved into a “No” status, and then you tried to **Move now**, you will receive the reminder to complete the field which is indicated by the **red***

The screenshot shows a form with a header "No reason" and a red instruction: "Please indicate the reason for selecting the no status:*". Below this is a dropdown menu with the text "Select" and a red asterisk icon to its right, indicating a required field.

Once the reason for Non-selection has been made and **Move now** has been clicked, you are returned to the applicant card that indicates the “No” status.

Additionally, Hiring Managers have the ability to send customized or template emails to the applicant, indicating their status in the process.

[Applicant history section](#)

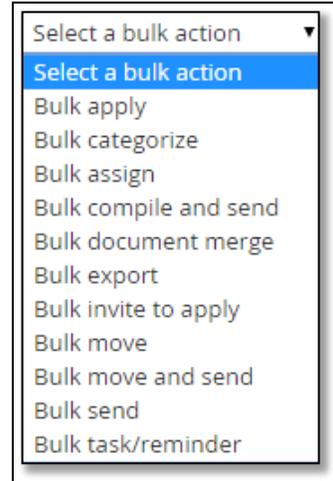
On the applicant card, there is a section called **Applicant History** where you can view the history of an applicant and filter by **item** (e.g. documents, communications, notes) and/or by **job** (e.g. you can view ALL documents attached to an applicant or filter by job and view documents only for a particular job).

Managing applications - Bulk activities

Note: Bulk activities can be used throughout your recruitment process to process multiple applicants at the same time. Certain actions may not pertain to all users.

[Bulk categorize](#)

From **Manage applicants**, select a number of applications and click on **Bulk categorize** in the top toolbar. From the category library, open the category groups and select the applicable categories to apply. Click **add** when ready. A yellow information bar will confirm the action. To verify, open an applicant card and confirm that the category is added against the applicant.



Bulk communication

From **Manage applicants**, select a number of applications and click on **Bulk communicate** in the top toolbar. Choose the correct communication template to preview the template and click **next** when ready. From this next page, you can make updates to the template if required before clicking **send**. You can also export the person out to an excel file to perform a mail merge. If this has been selected, an excel document will open. A yellow information bar will confirm the action. To verify, open an applicant card and verify the communication was sent via the applicant history area.

Bulk compile and send

From **Manage applicants**, select a number of applications and click on **Bulk compile and send** in the top toolbar. Check Application form as the application document you wish to print and click on **Create PDF**. When the process is complete and the Download document dialogue is displayed, complete the user details you would like to send the documents to and click **OK**. Then click on the **Done** button to return to **Manage applications**.

Bulk move

From **Manage applicants**, select a number of applications and click on **Bulk move** in the top toolbar. Choose the applicant status you wish to move the applicants to. You have the option of communicating with the applicants at this point if you wish as well as assign to a talent pool and make a note. Click **move now**.

Bulk move and send

From **Manage applicants**, select a number of applications and click on **Bulk move and send** in the top toolbar. Select the information you wish to send to a user. Once you click **next**, the user will receive an email with URL's containing the details you have compiled. The next page will perform a standard bulk move.

Bulk task/reminder

From **Manage applicants**, select a number of applications and click on **Bulk task/reminder** link in the top toolbar. Complete the details of the task and click **save**. Click on your dashboard to view the task.

Bulk selecting applicants within a job

On the **Manage applications** page you will see a **bulk selector** button on the top left hand side of the page. Here, you have the option to select **All pages** or the **Current page** for each color box. There is also the option to **Clear all** of your selections. Alternatively, bulk selections will be automatically cleared once a bulk action is performed or the user navigates to a different part of the system.

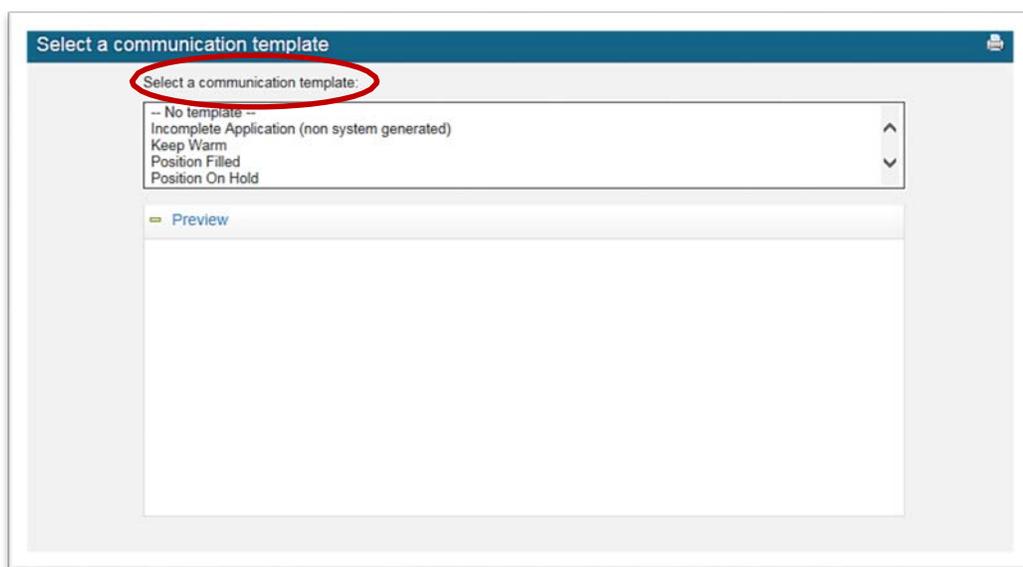
The system will remember your selections if you open an applicant's details during this task (e.g. you click on their name to bring up the applicant card or you click on their application form). If other actions are performed from this page (e.g. you **Bulk move a Status** and come back to the **Manage applications** page), your bulk selections will be cleared.

Communicating with candidates specific to a job application

Select the **Mini Actions** toolbar (middle of applicant card) next to the job and then select **Communicate**.



Then you may select a communication template. If you wish to communicate with the applicant / candidate free form, select **No template**.



If you select **No Template**, this screen will appear.

The screenshot shows a window titled "Communicate" with a blue header bar. Below the header, the text reads: "You have requested to communicate with Dennis Devenney. You can communicate using the methods below:". There are two radio buttons: "E-mail Applicant" (selected) and "No". Below this are two text input fields: "From:" and "Subject:". A "Message:" label is positioned to the left of a large text area, and a "Merge fields" link is to its right. The text area contains the text "Dear Denny,". Above the text area is a toolbar with a "Format selection" dropdown, icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink, and a "Tools" dropdown. Below the text area is a "Delay e-mail by:" label and a "No delay" dropdown menu. At the bottom of the window, there is a yellow highlighted box containing the text: "No SMS will be sent to the applicant as they do not wish to receive them." At the very bottom are three buttons: "Send", "Cancel", and "Spell check".

Making an offer

Application status move to Reference Check

Once you have interviewed your candidates and you are ready to make a recommendation for hire, you will be required to change the status of the applicant to **Reference Check**. First, open the requisition, and then select **View Application**. Next, click on the **Status** of the applicant you want to move to **Reference Check**. The Managers Hiring Guide will provide you with information on completing [Reference Checks](#).

Application status move to Prepare Offer

After completing the **Reference Check**, and you are ready to prepare an offer, you are required to change the **Status** of the applicant to **Prepare Offer**. Open the applicant's applicant card. Change the applicant's current status by clicking on the blue status link and choose the status of **Prepare Offer** which will trigger the start of your offer process. Click **Next**. **Prepare Offer** will be the last status you will move the candidate into. Any future **status** changes, with the exception of the **"No"** status will be done by the Human Resources Office.

Select	Submitted	Status	Pref Name
<input type="checkbox"/>	16 May 2017	Prepare Offer	Karen

- New
- Minimum Qualifications Met
- Phone Interview
- In Person Interview
- Reference check
- Prepare Offer**
- Withdrawn
- No
- Incomplete
- Submitted

Page 1 of 1 | [Navigation icons]

SALARY: Part time

Submit Next > Cancel

Click **Yes** to update the **Job status** at the same time you are updating the applicant status. **Move Now. Do not elect to send an email to the Applicant.**

From status: Prepare Offer
To status: Prepare Offer

Communication template: -- No template --

E-mail: Applicant: Yes No

Additional users from Job: Yes No

Note

The following will be added to the applicant notes for administrators to view:

Move now Cancel Spell check

After clicking **Move Now** the **Offer card** (offer details page) will be displayed.

Fields from the **Requisition** and the **Applicant Card** will be pre-populate certain fields on the **Offer Card**. The initial display of the **Offer Card** pulls forward personal details, job details and offer details contained in the **PageUp** applicant tracking system.

In the Offer details section, you will see the **Position Number** and **Applicant's name**. In most situations, the Position number will already be marked for the individual. However, if there are several position numbers listed on the job requisition, you may need to change the position number to match the applicant. To do this, select the appropriate position number and proceed with the offer card.

[Complete offer details](#)

From the **Offer details** page, enter details into all fields ensuring all mandatory fields are completed.

Ensure that the Standard Background Check selection is marked as Yes. If your job description required additional background checks such a Credit Check or Motor Vehicle Check, you will want to indicate these additional checks within the **Additional Checks** field.

You must select PO New Start Form 8.22 within the Onboarding Form dropdown list (Feature not yet active).



The screenshot shows a form titled "ONBOARDING". Below the title, there is a label "Onboarding form:" followed by a dropdown menu. The dropdown menu is currently set to "PO New starter form 8.22".

You should select "No Onboarding" in the **Onboarding Workflow** section

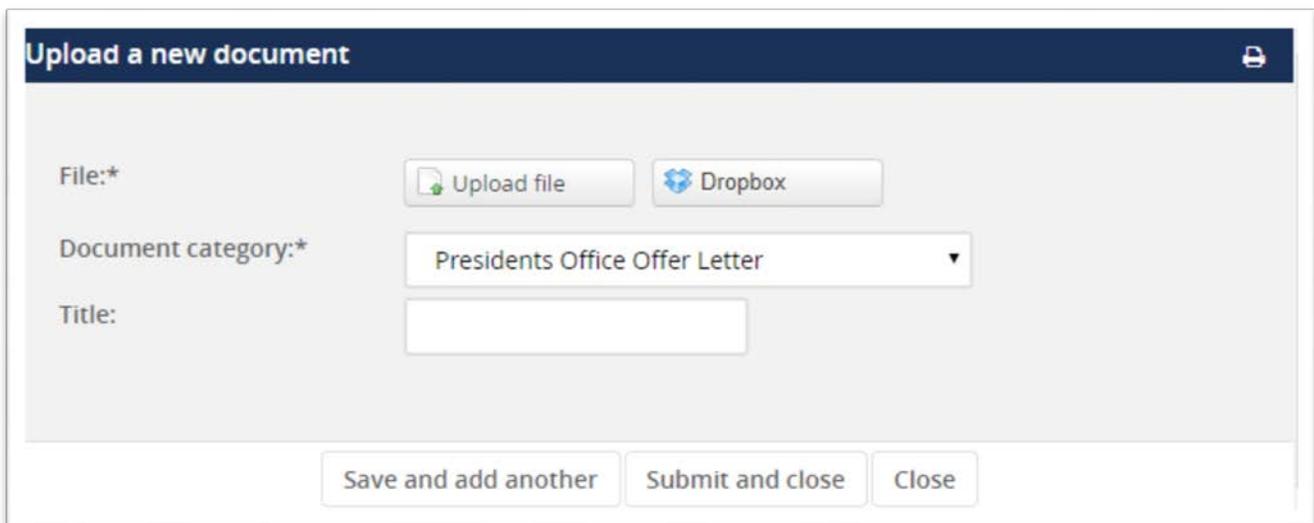


The screenshot shows a form with a label "Onboarding workflow:*" followed by a dropdown menu. The dropdown menu is currently set to "No Onboarding".

The Onboarding delegate should be Jennifer Forsberg, jforsberg@umassp.edu

Offer Documents

In this section you will upload the Offer Letter. **Please email HRPO@umassp.edu for the template Offer Letter before proceeding.** First you should select **Add Document**. The system will prompt you to save the **Offer Card**. Save the **Offer Card** and continue. Next you will select **Upload File** and search for the offer letter within your documents. Finally, select "President's Office Offer Letter" from the drop menu, **Document Category**. Name the document and **Submit and Close**.



The screenshot shows a dialog box titled "Upload a new document". It contains the following fields and buttons:

- File:*** with two buttons: "Upload file" and "Dropbox".
- Document category:*** with a dropdown menu set to "Presidents Office Offer Letter".
- Title:** with an empty text input field.
- At the bottom, there are three buttons: "Save and add another", "Submit and close", and "Close".

The upload offer letter should now appear within the Other Documents section and Application Documents. Should you need to make a change to the already uploaded offer letter, first delete the existing document and repeat the above steps.

After uploading your offer letter, you may now select an **Approval Process (President's Office or Donahue)**. Enter the appropriate names, if names did not default and then select **Submit and Close**. This will start the approval process. Human Resources is last in approval workflow and will be responsible for sending the offer letter out to the candidate. Hiring Managers will be notified via the system and an applicant accepts the offer letter within the applicant portal.

Approving offers

Approving an offer

Select **My offer approvals** on the right hand menu. Click **View** next to the offer you are an approver for and review the details of the offer. If you scroll down to the bottom of the offer details page you will see approve/decline buttons. You will also see your name listed as an approver as well as the names of the remaining approvers. Click **Approve**. On the **Manage offer approvals** page, the information panel displays that the job has been approved.

Declining an offer

Select **Manage offer approvals** on the right hand menu again. Click **View** next to the job you are an approver for and scroll down to the bottom of the page. Click **Decline**. A pop-up requested a reason for your decline will be displayed and this is mandatory. **Save**.

Restart an approval process

In the approval section of the offer card, click **Cancel**. A pop-up will appear requesting a reason for cancelling. You will then need to select **Restart** to create a new approval process. Fill this in and select a new approval process.

Closing jobs

Updating the job status

Click **Manage jobs** and search for the job to update. Click the **Close job**  icon to close the job. This icon is available from the **Manage jobs** page but also at the bottom of the requisition. Select the non-current job status you would like to move this job into (typically filled or cancelled). A reminder is displayed alerting you that all open sourcing channels will be closed once this action is complete.

Managing applicants in a current statuses

Applicants are sorted into current vs. non-current statuses. A non-current status indicates the applicant has reached an end point (e.g. Interview unsuccessful). A current status indicates that the applicant is still active and has not been made aware of the outcome of their application. The system will show you all applicants in a current status. Click the blue hyperlink for each applicant to view their applicant card. From here you can change their status and communicate accordingly. Click **Refresh** on the **Close job** page to see your applicants removed from the list as they are cleared from a current application status.

Notify agency of job closure

When you close a job there will be an option to email your agencies that the job is now closed. This email can be sent to all agencies that you released the job to.

Dashboard

Display a recruiter's jobs on the dashboard

The dashboard is the landing page for your users in the administration system. It provides a summary to the user of their current work and the ability to access jobs and applicants from the homepage. Jobs you have created will appear on your dashboard. Click **Dashboard** in the right side menu to view. You will see your jobs in the **Current jobs** column grouped by job status. The job statuses can be expanded/collapsed to view your job details.

Job information link – access to the job

Each job on your dashboard will contain the information  icon. This icon provides a summary of the job and the applicants that have applied for the job. From this icon, you can click on the job title which will take you to the requisition.

Job information link – access to the applicants

From the information icon, you can access applications for a job. Click on applicant names to view the applicant card. Click on an **application status** e.g. **New (1 app)** to view the **Manage applications** page.

Create a task for yourself

Click on **New task** in the right side menu. A pop up box will appear. Enter detail into task name, task description, select a due date in the future, select **Myself**, and enter a percentage amount completed. Click on **Save**. The details of this task will be saved in the **Tasks** column of your dashboard. From here you can **Edit** and **Delete** tasks if required.

Assign a task to another user

Click on **New task** in the right side menu. Enter detail into task name, task description, select a due date in the future, select **Another user** and click on the binoculars icon to launch a listing of users who the task can be assigned to. Select the details of the user you want to assign the task to and click on **OK**. Finally, enter a percentage amount completed. Click on **Save**.

View assigned task details from Dashboard

Select **Dashboard** in the right side menu and click on the **View assigned tasks** link in **Your tasks**.

Note: an overdue task will display red **on your tasks** panel.

Roles within PageUp

Position Description field Roles

Hiring Manager (required field):

Currently this field defaults to whomever is creating the PD. Person in this field will receive a notice when the position description has been approved for recruiting. Will not carry over to the requisition. Has no other function other than receiving notices on the PD process.

Human Resources (required field):

Should always be HR. See user guide for correct email address.

Requisition field roles

Hiring Manager (required field):

On the requisition, this field will always default to the person who is creating the requisition. If the individual creating the requisition is not a true hiring manager for this position, you should replace the name.

Responsible for day-to-day applicant and search management on a requisition that they are assigned to. Most powerful role with most visibility on requisitions. Has the ability to move applicants into the correct disposition codes throughout the hiring process. Will see all jobs status (open, filled, draft, approved etc). Is able to communicate to applicants via PageUp.

Can view jobs assigned to them by selecting the jobs link at the top of the page.

Will receive notifications on throughout the job process.

Administrative Support/Originator (optional field):

Should be the Individual who is completing the Requisition. Similar to the hiring managers role, will be able to view all applicants and move applicants into correct disposition codes throughout the hiring process. Will see all jobs status (open, filled, draft, approved etc). Is able to communicate to applicants via PageUp

Can view jobs by selecting the jobs link at the top of the page.

Search Committee chair (option field, but PO will require search committees in the hiring guide):

Typically someone who will oversee the applicant search. Only able to see jobs that they are assigned to. Will be able to view search committee members' feedback. Should oversee search committee meetings and make recommendations to Hiring Manager. Search Chair may typically be the Hiring Manager. Search Chair is able to view applicant documents. Able to view the original requisition, but cannot edit it. Responsible for working with the Hiring manager, Chair Communication – HR or Administrative Support/Originator to move an applicant into the correct disposition status. Cannot move an applicant into different disposition codes. Cannot communicate with an applicant.

Can view assigned jobs by selecting the Search Committee Review bubble.

Chair Communication – HR (optional field):

If your Search Committee Chair and Hiring Manager are different people, and you would like your Search Committee Chair to be able to move applicants through different dispositions and communicate with applicants; then you should put your Search Committee Chair member in this role.

Can view jobs by selecting the jobs link at the top of the page.

Search Committee Member:

Can only view applicants and is able to rate an applicant based on the selection criteria. Unable to comment on an applicant. Search Committee Members should be provided with the Selection Criteria from the requisition. Admin, Search Chair, Chair Communication or Hiring Manager is able to provide selection criteria to the Search Committee Members.

[Offer Card field roles](#)

Reports to Manager (required field by HR):

Who this individual will report to. Will receive notices (future rollouts) in relation to onboarding responsibilities and provisioning.

Onboarding Delegate (required field by HR):

Should always be HR – see user guide for required email address.

Originator (required field):

Individual completing the Offer Card

Revision History

Revision	Date	Change by
1	9/1/2017 - Final	Matt Wamback
2	4/27/2018 – Page 35 revised – Communication to applicant	Matt Wamback
3	4/30/2018 – JD template update	Matt Wamback
4		
5		
6		
7		