PeopleAdmin SelectSuite 7 Software Upgrade

Presented by SFA - Human Resources

October 17th – Go Live
Training Objectives

At the end of this training, you will be able to:

1. Log in to SelectSuite 7
2. Be familiar with the “Functional Areas”
3. Understand the User Types
4. Understand life cycle of posting
5. Create a posting
6. Approve a posting
7. Use search committee functions
8. Use dispositions
9. Understand site-triggers & automatic emails
10. Complete hiring proposals
What about current 5.8 postings?

• **Current version:**
  – Available for a few months
  – Finish current searches
  – All 5.8 postings will then be archived

• **New postings:**
  – New Site
  – October 17th
  – (Monitored by HR)
Training Materials – SFA HR Site

1. PowerPoint

2. Quick Guides (How To’s):
   - Post a position
   - Approve a posting
   - Use search committee functions
   - Assign disposition reasons
   - Create hiring proposals
   - Uploading search documents
Current 5.8 System

– Unique username and password to log in.

– Manual account creation.

– No reporting capabilities.

– No onboarding capabilities.

– Outdated look and feel.
Highlights of SelectSuite 7

– Single Sign-on
– Updated look and feel
– Account creation is automatic
– Robust analytics and reporting capabilities
– Online onboarding for new employees
– Comparing and rating candidates is easier
<table>
<thead>
<tr>
<th>Functionality</th>
<th>PeopleAdmin 5.8</th>
<th>SelectSuite 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>SelectSuite Analytics</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>ReportBuilder</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Search Committee</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Evaluative &amp; Ranking Criteria</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Data Purging</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Mobile-friendly Applicant Portal</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Resume Parsing</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Apply with LinkedIn + Vitae</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Social Recruiting &amp; Sharing</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Back Button Support</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Chat Support</td>
<td>N/A</td>
<td>Included</td>
</tr>
<tr>
<td>Multiple Windows</td>
<td>N/A</td>
<td>Included</td>
</tr>
</tbody>
</table>
Single Sign-On
SFA Credentials

Stephen F. Austin University

Forgot your password? Request a password reset
User Types

• **Applicant**: outside applicants will create username and password.

• **Employee**: automatically assigned to each new employee upon hire.
User Types

Assigned by HR:
• President
• Vice President/Provost
• Dean
• Department Head/Chair
• Budget
• University Marketing

Assigned by Department (for Search Committees only):
• Search Committee Member
• Search Chair/Manager
PA 5.8 Faculty/Staff Approval Process

1. Chair/Dept. Head
2. HR Review
3. Chair/Dept. Head
4. Dean (if applicable)
5. Budget Office
6. VP/Provost
7. President
8. Human Resources
9. University Marketing (if exempt)
10. Human Resources
11. Posted
PA 5.8 Faculty/Staff Approval Process

1. Chair/Dept. Head –> “Search Chair”
2. HR Review
3. Chair/Dept. Head
4. Dean (if applicable)
5. Budget Office
6. VP/Provost
7. President
8. Human Resources
9. University Marketing (if exempt)
10. Human Resources
11. Posted
New Approval Process

1. Search Chair/Manager
   • “Posting Initiator”
2. Chair/Dept. Head
3. Dean (if applicable)
4. Budget Office
5. VP/Provost
6. President
7. University Marketing
8. Human Resources
9. Posted
Posting Life-Cycle

Posting Created by Dept. → Approval Process → Posted

Applicants Apply to Position → Applicants Reviewed and Scored → Candidates Selected for Interview

Dispositions → Hiring Proposal → Posting Archived
Demo – Creating a Posting
Creating a Posting

Shortcuts

View Document Conversions
Report
Create New Administrative Staff Posting
Create New Faculty Posting
Create New Student Posting
My Reports
Posting a job

What would you like to use to create this new posting?

Create from Position Type
Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.

Create from Posting
Uses an existing posting as a template and automatically copies in most information.

Create from Posting Template
Copies in information from a Posting Template
Posting a job

To add a new column to the search results, select the column from the drop down list.

Saved Searches ▼

Search

More Search Options ▼

Posting Templates

"Posting Templates" ▼ Selected records ▼ Clear selection?

Posting Name | FLSA | Salary Grade | Status | Last Status Update
---|---|---|---|---
Administrative Support Assoc | Non-Exempt | 1 | approved | September 28, 2015 at 03:00 PM
Posting a job

Print Preview

Create Posting from this Posting Template
New Posting

* Required Information

Position Title *

Administrative Support Assoc

Organizational Unit

Branch *

Finance and Administration Area

Division *

Finance and Administration Division

Department *

Please Select...

Applicant Workflow

Workflow State

Human Resources Initial Review

When an application is submitted for this job, it should move to which state in the Candidate Process workflow?

References

Reference Notification

Request References to submit Recommendations when candidate reaches selected workflow state?

Recommendation Workflow

When all Recommendations have been provided, move to selected workflow state?

Recommendation Document Type

No Document

Allow a document upload when a reference provider submits a Recommendation?
Complete the Fields

Budget Information

* Required Information

- Is Replacement Position?  
  - [ ]

If replacement, Previous Incumbent Name

Salary Grade

Min Pay Rate

Mid Pay Rate

Max Pay Rate

Check spelling

This field is required.
<table>
<thead>
<tr>
<th>Position Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplemental Questions</td>
</tr>
<tr>
<td>Documents Needed to Apply</td>
</tr>
<tr>
<td>Internal Posting Document</td>
</tr>
<tr>
<td>Search Committee Members</td>
</tr>
<tr>
<td>Evaluative Criteria</td>
</tr>
<tr>
<td>Summary</td>
</tr>
</tbody>
</table>
Add Search Committee Members

• All SFA employees will be in the system.

• Users may select committee members.

• Members will rank/review applicants.
Don’t Forget the Budget Summary

Is there an approved budget for this position?  
Yes

Budget Summary

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Budget Fund Name</th>
<th>Budget Org</th>
<th>Budget Program</th>
<th>Amount</th>
<th>Percentage Funded</th>
<th>Budgeted Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ Remove Entry?
Summary

### Budget Information

<table>
<thead>
<tr>
<th>Is Replacement Position?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>If replacement, Previous</td>
<td></td>
</tr>
<tr>
<td>Incumbent Name</td>
<td></td>
</tr>
<tr>
<td>Salary Grade</td>
<td>1</td>
</tr>
<tr>
<td>Min Pay Rate</td>
<td></td>
</tr>
<tr>
<td>Mid Pay Rate</td>
<td></td>
</tr>
<tr>
<td>Max Pay Rate</td>
<td></td>
</tr>
<tr>
<td>Salary Information</td>
<td></td>
</tr>
<tr>
<td>Is this a grant funded</td>
<td></td>
</tr>
<tr>
<td>position only?</td>
<td></td>
</tr>
<tr>
<td>Is there an approved</td>
<td>No</td>
</tr>
<tr>
<td>budget for this position?</td>
<td></td>
</tr>
</tbody>
</table>
How to Approve a Posting - 1

- Be sure you are in the correct user type. (top right)
How to Approve a Posting - 2

Inbox 3

Displaying items for group "Dean".

<table>
<thead>
<tr>
<th>Postings (3)</th>
<th>Hiring Proposals (0)</th>
<th>Position Requests (0)</th>
<th>Special Handling Lists (0)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Type</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resources Representative</td>
<td>Administrative Staff</td>
<td>Dean</td>
</tr>
<tr>
<td><strong>Administrative Support Assoc</strong></td>
<td>Administrative Staff</td>
<td>Dean</td>
</tr>
</tbody>
</table>

See more...
Approving/Submitting Posting to Next Queue

Take Action On Posting

- See how Posting looks to Applicant
- Print Preview (Applicant View)
- Print Preview
Search Committees-
Evaluating Applicants

Take Action On Job Application

★ View Posting Applied To
★ Preview Application
★ Evaluate Applicant
Search Committees - Evaluating Applicants

- Created within each posting
  - Ranking and scoring items will be saved for future postings under the “Create from Posting” option.

- Rank Criteria

- Scoring and Weighted Scoring

- Can replace screening matrix
General

How well did this candidate perform in the interview?

Possible Answers:
1. Unacceptable
2. Below Average
3. Average
4. Above Average
5. Superior

Applicant workflow state: Campus Interview

General

How do you rank this candidate's written communication?

General

Please rate the candidate's quality of references.

General

Describe a typical day...a typical week

Work Standard

What are your standards of success in your job? What have you done to meet these standards?

Experience

What leadership skills and experience do you have that would qualify you as an effective leader? Be specific.

Education

How well does this candidate's education fit with this position?

General

Please rate the level of awesome this candidate exudes.

Experience

How well did the candidate describe their human resources experience as it relates to the job duties of the position -- employment, personnel records, maintaining personnel records?

Education

Does the candidate have a human resources certification -- SHRM-SCP, SHRM-CP, SPHR or PHR?

Experience

Years Experience

Displaying all 12

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

Submit  Cancel
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Weight</th>
<th>Workflow State</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Do you have a PHR Certification?</td>
<td></td>
<td>Draft</td>
<td>pending</td>
</tr>
</tbody>
</table>

**Name**  PHR Certification Y/N  
**Label**  PHR Cert  
**Workflow State**  Draft  
**Weight**  20  
**Possible Points**  
**Rankings**  
- Yes  5  
- No  0
Dispositions

Select (move to Interviewed, Not Hired)

Reason (required)

Please select

Submit  Cancel
### Dispositions

<table>
<thead>
<tr>
<th>Accepted offer with another organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not show for interview</td>
</tr>
<tr>
<td>Not considered after initial phone/web conference screen</td>
</tr>
<tr>
<td>Met requirements, but another individual had more relevant experience/education</td>
</tr>
<tr>
<td>Candidate well qualified - Will be considered if first choice declines</td>
</tr>
<tr>
<td>Poor or unprofessional responses to questions</td>
</tr>
<tr>
<td>Incoherent or incomplete responses to questions</td>
</tr>
<tr>
<td>Unprepared or uninterested</td>
</tr>
<tr>
<td>Did not demonstrate experience level required</td>
</tr>
<tr>
<td>Others were better suited- Education</td>
</tr>
<tr>
<td>Others were better suited- Experience</td>
</tr>
<tr>
<td>Candidate well qualified - Will be considered if first choice declines</td>
</tr>
<tr>
<td>Unable to contact</td>
</tr>
<tr>
<td>Did not pass background check</td>
</tr>
<tr>
<td>Unfavorable references</td>
</tr>
<tr>
<td>Withdrew application</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Position canceled</td>
</tr>
</tbody>
</table>
Hiring Proposal

- ★ View Posting Applied To
- ★ Preview Application
- + Start ATS Hiring Proposal
Hiring Proposal

• Departments will be required to scan & upload their search committee materials to the hiring proposal

• HR will purge documents after 2 years

• Search Committee documents may include:
  – Phone interview notes
  – Face-to-face interview notes
  – Matrix (if printed copies used to rate candidates)
  – Any other documents used in the hiring process
Site Triggers & Automatic Emails

• HR can edit when/if applicants/employees receive emails
  – Triggers will be the same for all departments

• SFA Employees will receive emails when:
  – Posting needs to be approved
  – Added to search committee
  – Action needs to be taken
Site Triggers & Automatic Emails

• Applicants will receive emails when:
  – Not Interviewed, Not Hired
  – Interviewed, Not Hired
  – Fail Message (Did not meet minimum qualifications based upon answers to posting questions)
  – Position Canceled
Need Help?

- Help Link on Page

- Call HR
  - Nathan Pruitt: 1325
  - Becky Garrett: 1288
  - John Wyatt: 4075