Rowan University
INFORMATION RESOURCES & TECHNOLOGY

# PAGEUP

## TRAINING MANUAL

JANUARY 2020

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# Introduction to PageUp

- PageUp is Rowan University's applicant tracking system that is used to facilitate the end-to-end recruitment process from job requisition, candidate management, and online offer through the onboarding process for most new hires. The system provides a more streamlined experience for both Rowan University end users and applicants.

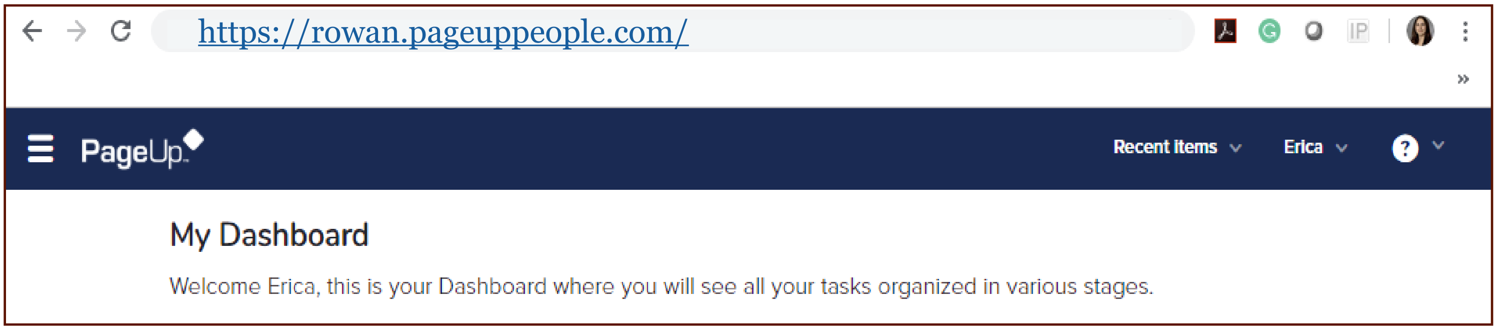
- This manual covers information for Employees, Search Committee Members, and Search Committee Chairs.

# Objectives

By the end of this manual the user will be able to:

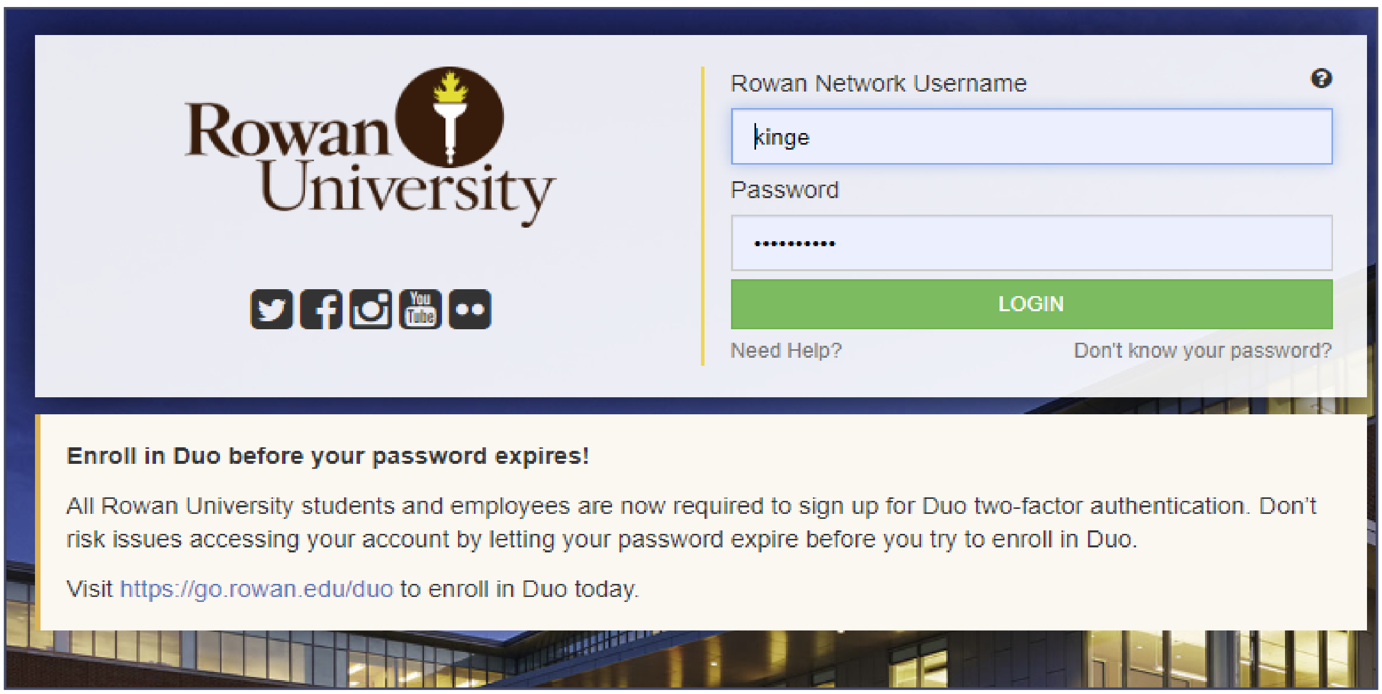
1. Log in to PageUp.
2. Navigate the Dashboard.
3. Begin and complete a Job Card.
4. Establish a Search Committee.
5. Understand the Applicant Experience.
6. Serve as a Search Committee Member.
7. Serve as a Search Committee Chair.
8. Complete the Appropriate Forms.
9. Understand Next Steps for Chosen Candidates.

# PAGEUP LOGIN




## PAGEUP HOME SCREEN

To enter PageUp, open Google Chrome, the preferred browser for PageUp, and enter [https://rowan.pageuppeople.com/](https://rowan.pageuppeople.com/) and hit return.

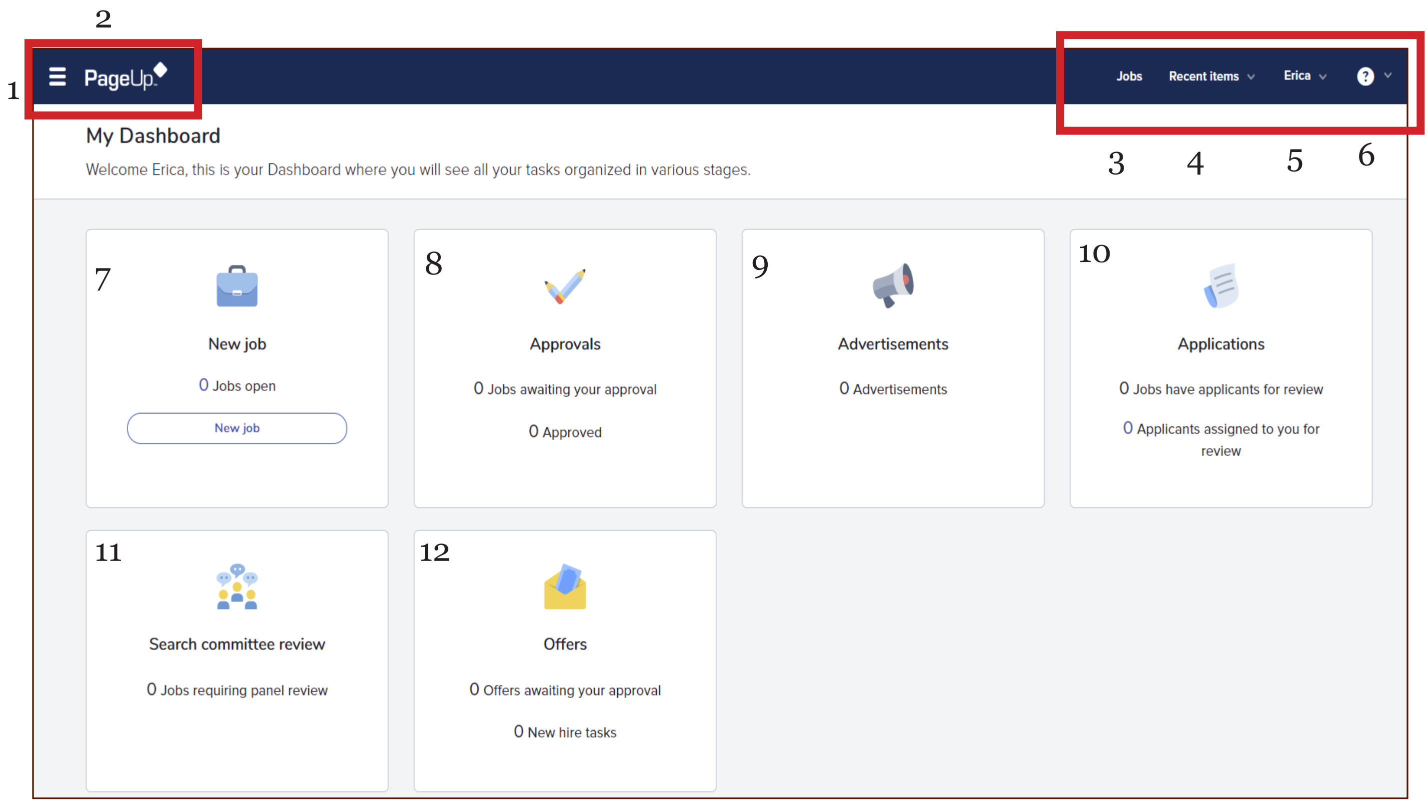



## ROWAN LOG IN SCREEN

Prior to the PageUp system loading, you will be required to verify your credentials by entering your Rowan user name and password, and entering duo authentication information.

1. Enter your Rowan network user name and password.
2. Click Login.
3. Enter Duo Authentication information when prompted.
4. The PageUp system should now load.

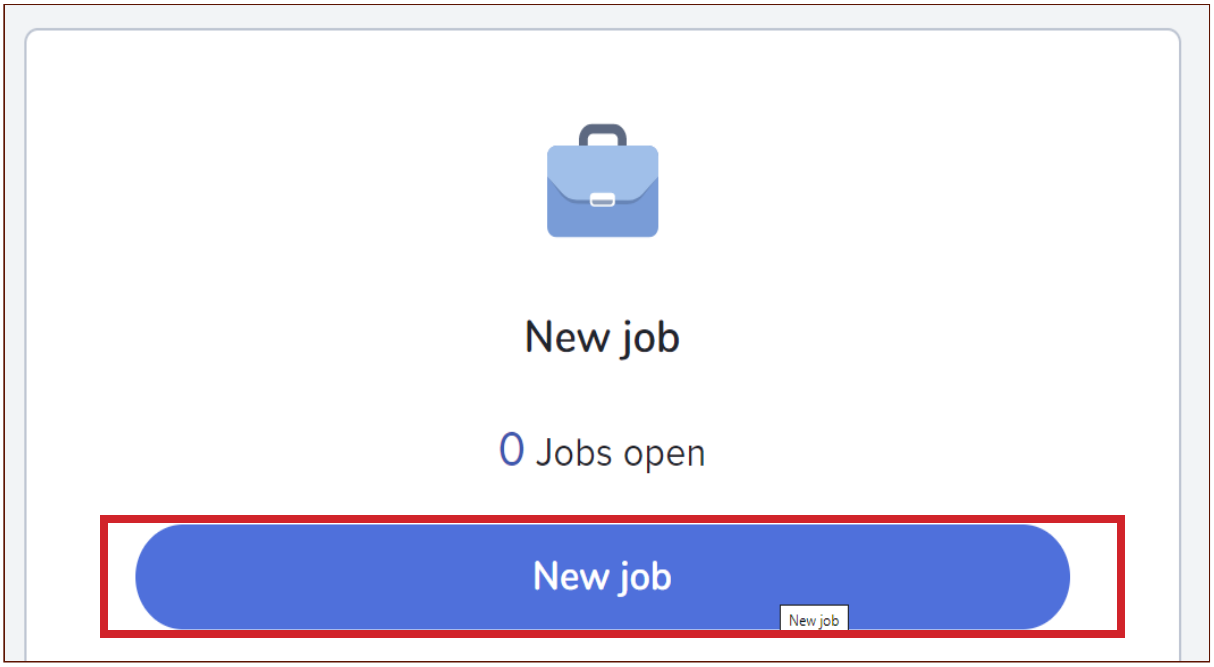
PageUp uses pop-up windows. Make sure your pop-up blocker is turned off. If you are unsure how to turn off your pop-up blocker, contact support at support.rowan.edu for assistance.




## PAGEUP HOME SCREEN

1. Main Menu - Access new job cards, view your open positions, view applicants for your open positions, and manage open positions
2. PageUp Logo - When you are in a screen and you need to return to the Dashboard, choose this logo
3. Jobs - View your open positions
4. Recent Items - Items you have viewed recently
5. Profile - Logout from this menu
6. Help Menu - Help options such as Live Support, Knowledge Portal, Support Cases, Feedback, and Print Options
7. New Job - Begin a new job card
8. Approvals - Positions requiring your approval
9. Advertisements - Position advertisement
10. Applications - Applications for positions that you must review
11. Search Committee Review - Positions requiring search committee review
12. Offers - Job offers awaiting your approval as well as outstanding tasks for new hires

# BEGIN A JOB CARD




## BEGIN A NEW JOB SCREEN

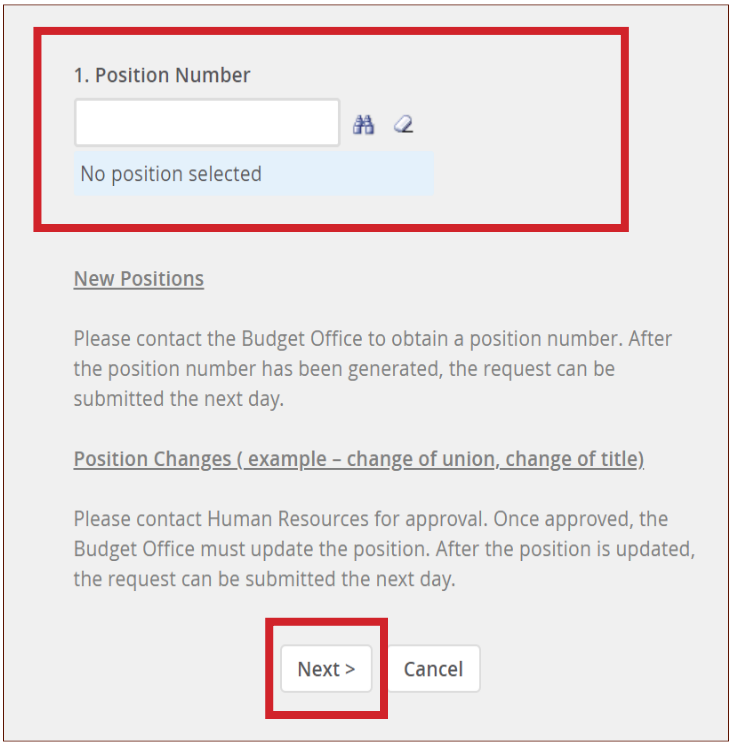
When there is an open position that must be filled, and you have a position number, begin a new **Job Card**. To begin a new **Job Card**, choose the **New Job** icon on the **Dashboard**.

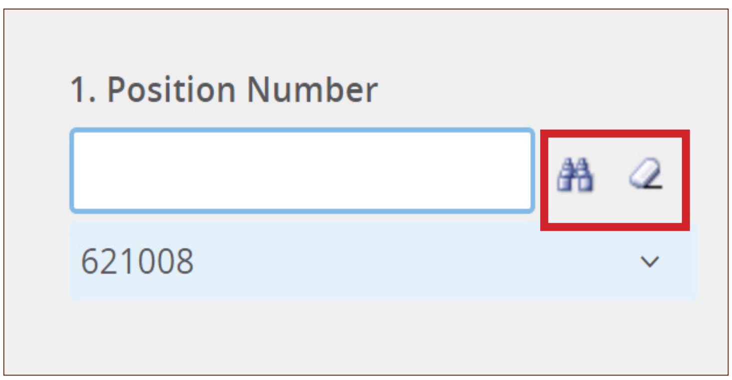
### Position Number:

To initiate a Job Card you will need a position number. If you do not have a position number:

- Contact the Provost office for new or revised Faculty (Adjunct through Tenure Track) and Managerial positions in Academic Affairs, or the Budget office for all other new or revised positions.
- Contact Human Resources for replacement positions.
- Contact OSP for grant positions.

If you have received a position number, for a new or revised position, that position number will be available to initiate a job card in PageUp one business day after the position creation/updates are completed in Banner.

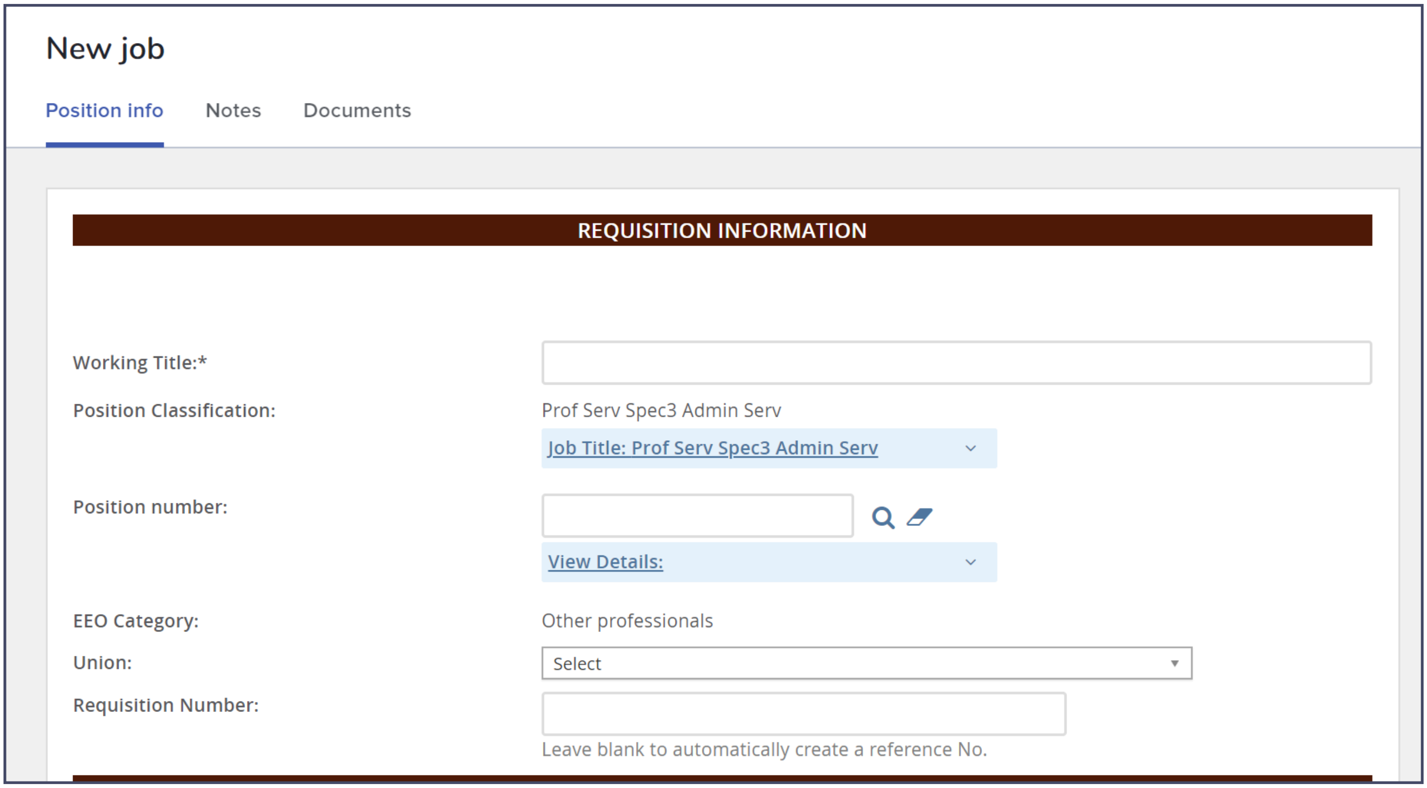



## POSITION NUMBER

To begin a Job Card follow the steps below:

1. Type the position number given to you by HR or the Budget office. If the position is a replacement, you may use the existing position number. Press tab on the keyboard and the position number will automatically appear in the blue area under the text box. **Do not use either of the buttons next to the position number field.**
2. Make sure that the position number is correct and that it is the position number approved for the vacancy.
3. Choose **Next**.




## JOB CARD POSITION INFO

You will see some fields are automatically populated when you fill out a **Job Card**. The tab key on the keyboard will help you navigate from field to field. Fill out the form, making sure to complete any necessary fields marked with an asterisk.

**Working Title** - Enter the title you would like to see when the position posts.

**Position Classification** - Automatically populated, this is considered the state title.

**Position Number** - Automatically populated in the blue area underneath the text box. If a mistake is made or a field needs to be changed in this form, use the **Clear Button**.

**Union** - The union should be selected, if known, but is not required to save the **Job Card**.

**Requisition Number** - Automatically populated, do not enter any information in this field.

The **Search** and **Clear** buttons appear next to many of the fields in a **Job Card**.

## New job

Position info | Notes | Documents

**REQUISITION INFORMATION**

Working Title:*

Position Classification: Prof Serv Spec3 Admin Serv
Job Title: Prof Serv Spec3 Admin Serv

Position number:
View Details:

EEO Category: Other professionals

Union: Select

Requisition Number:
Leave blank to automatically create a reference No.

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

Positions:

| | Position no | Type: | Applicant | Application status |
|---|---|---|---|---|
| 1 | View Details: | Select | - | - |

New: Replacement: Add more

Current/previous incumbent name: Jose Garcia-Cruz

Position type: Select

Hours Per Week
For Regular Part Time specify hours per week:

If temporary specify duration:

Fund, Org, Account Number, Program Number and Home Org Number: f:13000 o:80004 a:6002 p:16

VP Area:* Research

Department: Sponsored Programs/Main

Campus location:
No Site name selected.

Pay Grade: CC 21 2019
Minimum $ 53,611.83
Middle $ 63,518.00
Maximum $ 75,900.73

Pay Rate: Select

Requested Salary
Enter range, step and/or dollar amount
(*SOM Faculty – Include Academic Base Salary, Faculty
Practice Supplement and Total Compensation in this Field):

Maximum Budgeted Salary
BUDGET USE ONLY:*

Recruitment Process:* Select

# Funding Information

**Positions** - You must indicate if each listed position number is a **New Position** or a **Replacement Position**.

**Current / Previous Incumbent Name** - This is the name of the person who occupied the position prior (if applicable). For any replacement positions, indicate the current/previous incumbent name if it is not automatically populated.

**Position Type** - Choose from the drop down menu (Regular full time, etc).

**Hours Per Week** - For regular part time specify hours per week.

**If Temporary Specify Duration** - Choose dates or the duration of the temporary position.

**Fund, Org, Account Number, Program Number** - Automatically populated, based on the position number.

**VP Area** and **Department** - Automatically populated, there is no need to enter any information in this field.

**Campus Location** - Use the magnifying glass to choose a location. Make sure your pop-up blocker is disabled to make a selection. See page 4 for help with a pop-up blocker.

**Pay Grade** - Automatically populated, there is no need to enter any information in this field.

**Pay Rate** - Choose from the drop down menu (001, etc.). If not applicable, skip this step.

**Requested Salary** - This can be a range, step, or dollar amount. This is subject to approval.

**Recruitment Process** - Select the applicable process. If **Faculty Recruitment - Automatic Reference Check (Main Campus Only)** is chosen, all candidates who complete applications will have automatic emails sent to their listed references upon application submission. The emails will be sent regardless of whether or not the candidate is currently being considered for employment. Please ensure if selecting this status automatic emails are desirable, as any recruitment process selection cannot be changed once a job card is submitted for approval.

# JOB CARD SEARCH COMMITTEE

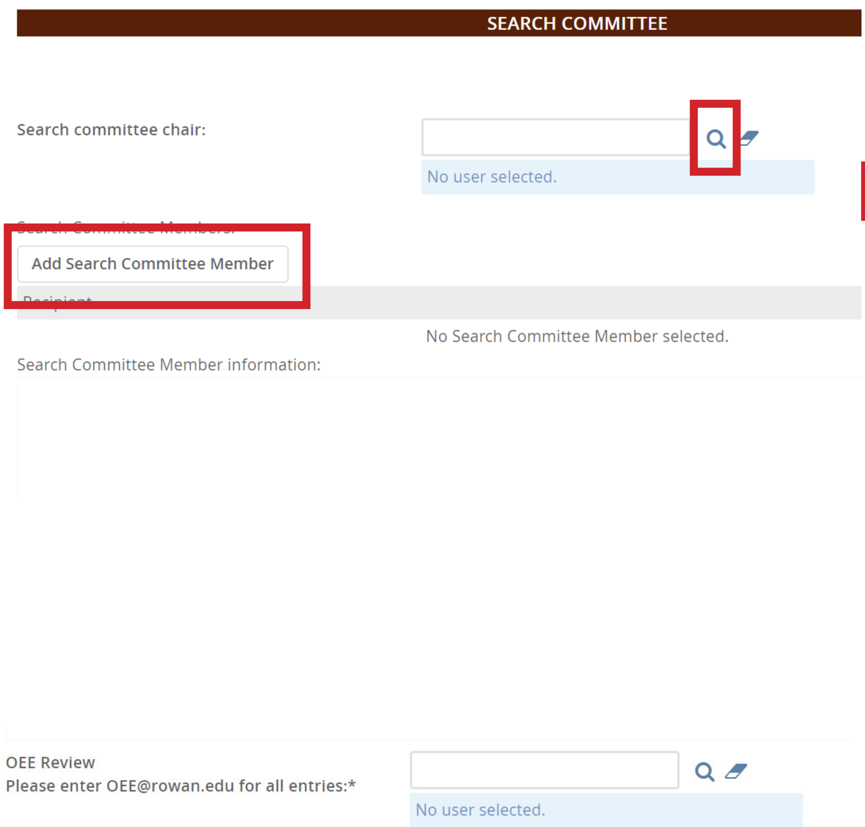
It is preferred to have the Search Committee Chair and Committee Members established and entered in the Job Card. If they need to be established later, send an email with the appropriate information to your HR representative or to *OEE@rowan.edu* for approval. Include the requisition number in the email.

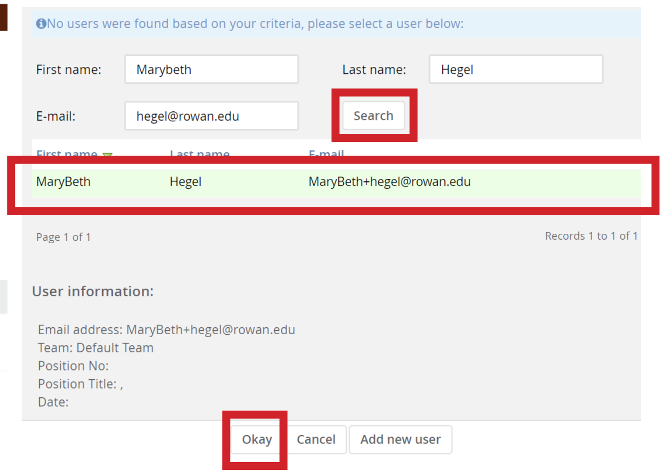
All search committee members are subject to approval and must annually complete the required **Search Committee Training** located in Banner Self Service in the employee section, under **Professional Development**.

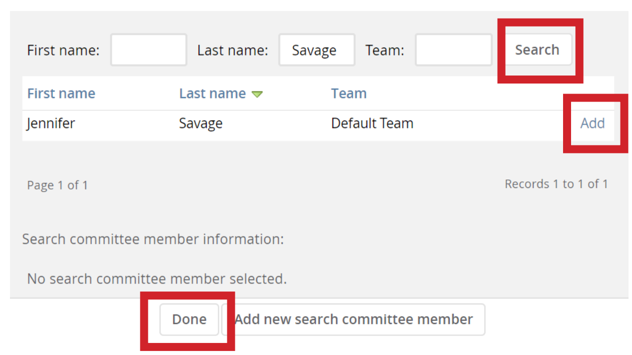
**Search Committee Chair** - Choose the search icon, then enter the employee's name and email to find an employee. Select the person you would like as your **Search Committee Chair**, and choose **Okay**.

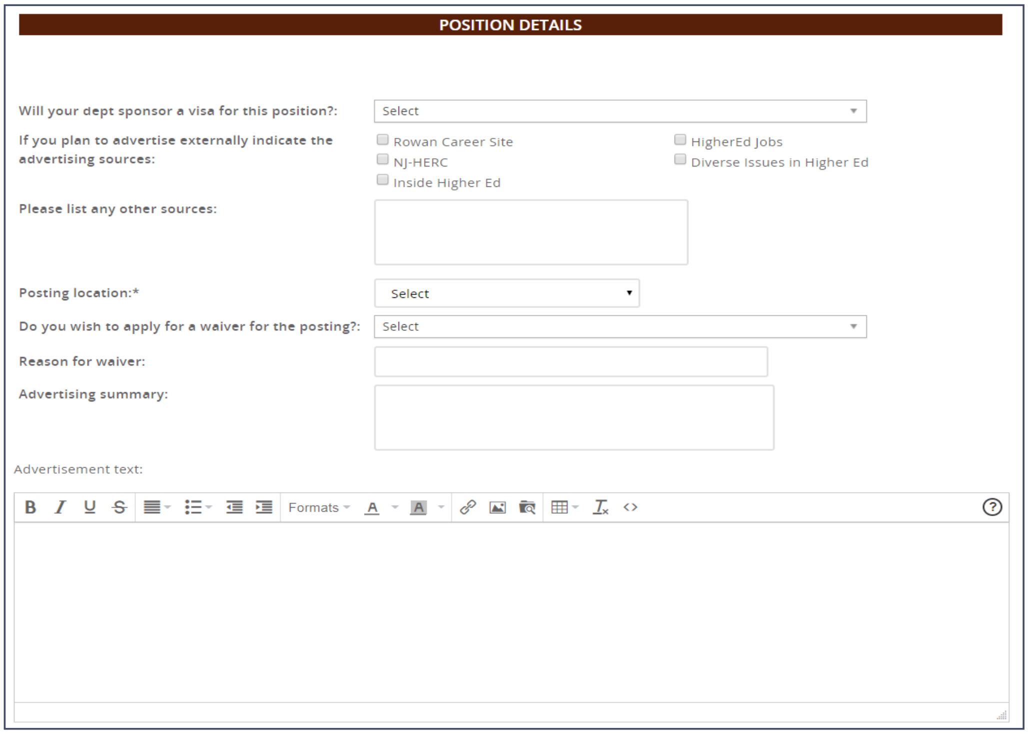
**Add Search Committee Member** - Choose the **Add Search Committee Member** button. Enter the employee's last name and choose **Search.** Select the correct employee and choose **Add.** Keep repeating the process until all the search committee members have been added. Choose **Done** when all the appropriate employees are added to the search committee.

**OEE Review - oee@rowan.edu** must be entered in this field, proceeded by the tab key on the keyboard.



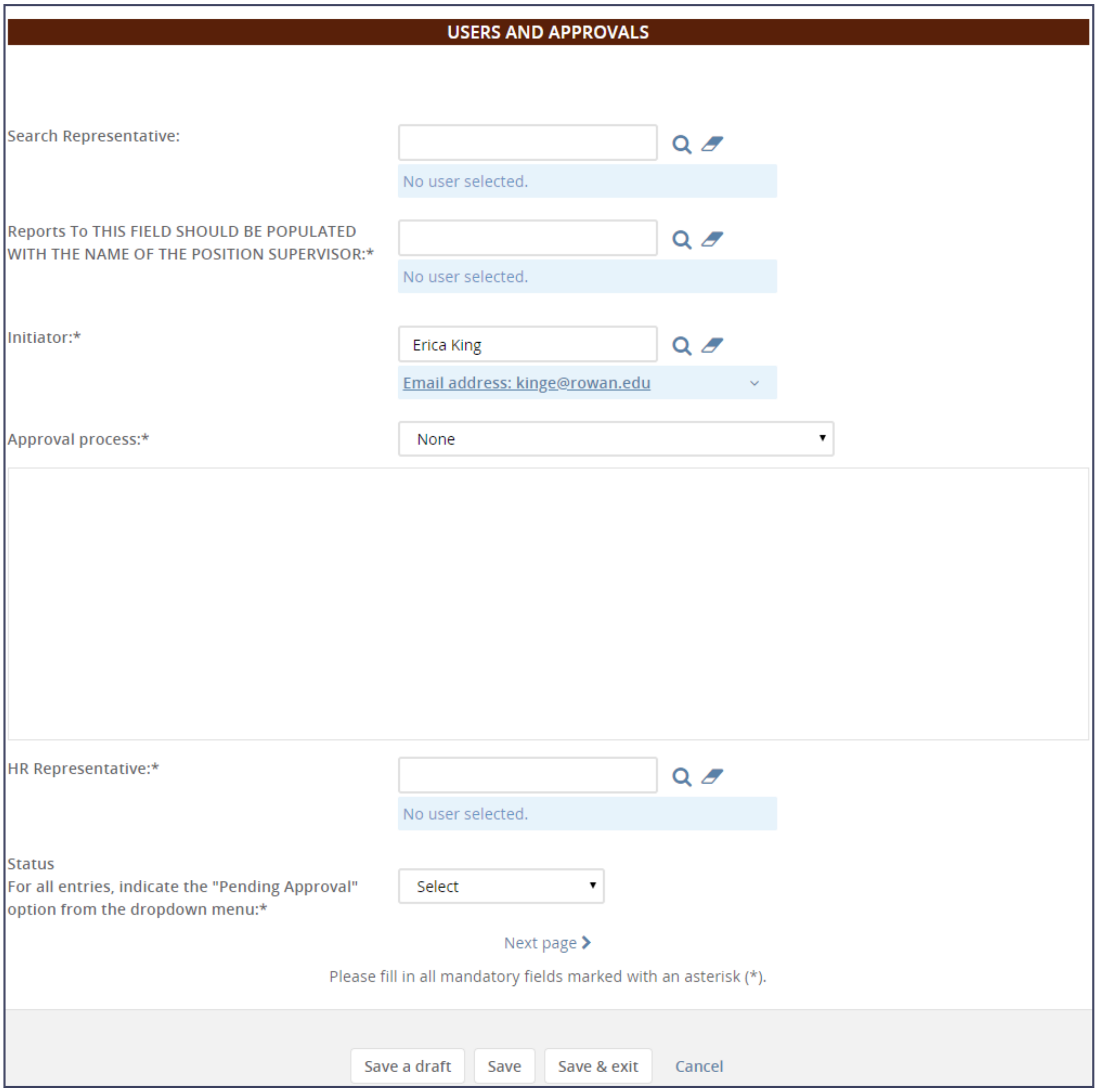






## JOB CARD POSITION DETAILS

**Will Your Department Sponsor a Visa for This Position? -** Yes or No.
**If You Plan to Advertise Externally Indicate the Advertising Sources - ** Choose which sources you would like to use to advertise your position by checking the boxes next to the external advertising sources.
**Please list any other sources -** List other sources like online professional organizations and sites.
**Posting Location -** Where is the position physically located?
**Do You Wish to Apply for a Waiver for This Posing? -** Yes or No.
**Reason for Waiver -** Contact Human Resources for guidance in the rare case where you would request a waiver.
**Advertising Summary** - Insert a summary of the position description here.
**Advertising Text** - Enter a full description of the position here including the requirements. You can type directly in the box or copy and paste from a document. You can also attach a document in the **Document** tab, listed at the top of the **Job Card** screen.

All summaries and the full position description are subject to approval by Human Resources prior to the position being posted.



USERS AND APPROVALS

Search Representative: No user selected.

Reports To THIS FIELD SHOULD BE POPULATED WITH THE NAME OF THE POSITION SUPERVISOR:* No user selected.

Initiator:* Erica King
Email address: kinge@rowan.edu

Approval process:* None

HR Representative:* No user selected.

Status
For all entries, indicate the "Pending Approval" option from the dropdown menu:* Select

Next page

Please fill in all mandatory fields marked with an asterisk (*).

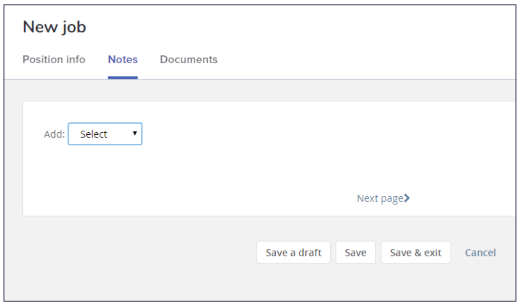
Save a draft | Save | Save & exit | Cancel

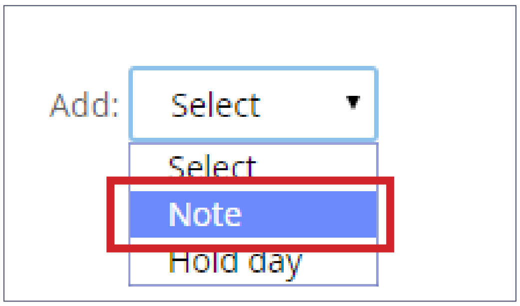
**Search Representative** - Enter the search committee chair or their designated proxy. This field is for someone who needs access to the search.
**Reports to -** The supervisor the position will report to.
**Approval process -** Select the applicable process. Most lines will automatically populate. For the blank approval lines for approval levels such as **Department Head**, **Division Approval**, and **Dean**, you may use the search button or enter the applicable email address and then the **Tab** key. Please note that all fields will automatically populate with your most recent entry if you have previously initiated a job card. Review the approval lines to ensure accuracy before submission.
**HR Representative** - This field will automatically populate.
**Status** - You must choose **Pending Approval** from the drop down menu if you want the approval process to begin once you save the card. Choose **Draft** if you would like to add information or confirm information after saving the job card without beginning the approval process.
**Next Page -** will advance to the next screen to continue the job card.

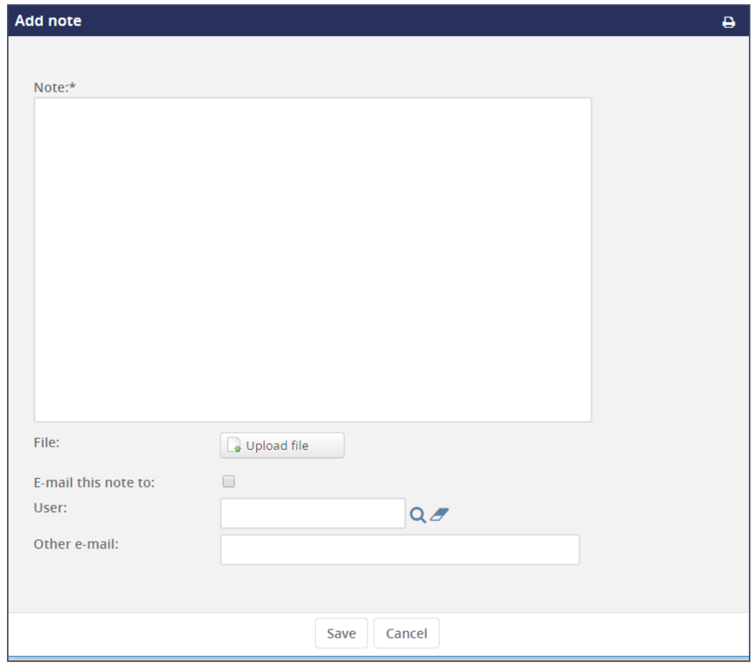
The next section of the job card is for **Notes**. **Notes** are used to add information to the job card that is important. For example, *"this position was approved for internal and external posting simultaneously by ..."*.

# JOB CARD NOTES

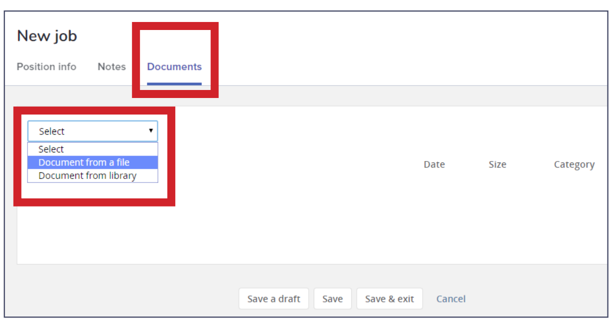
To create a note for Human Resources choose **Next Page** or at the top of the job card choose the **Notes** tab.

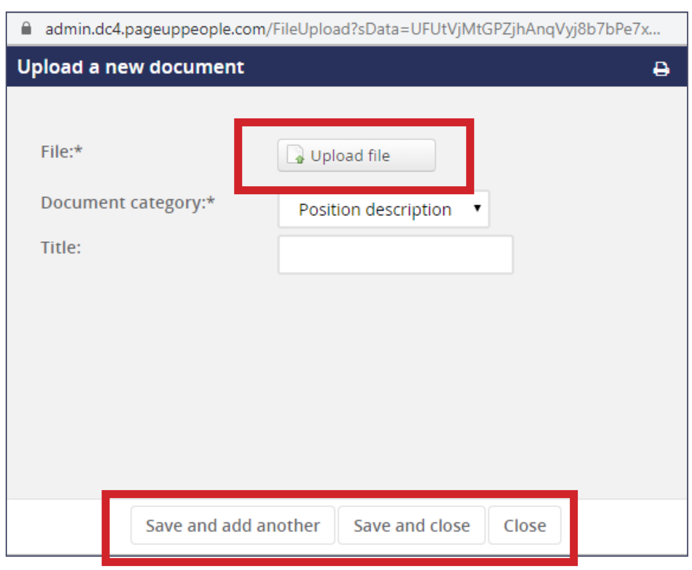


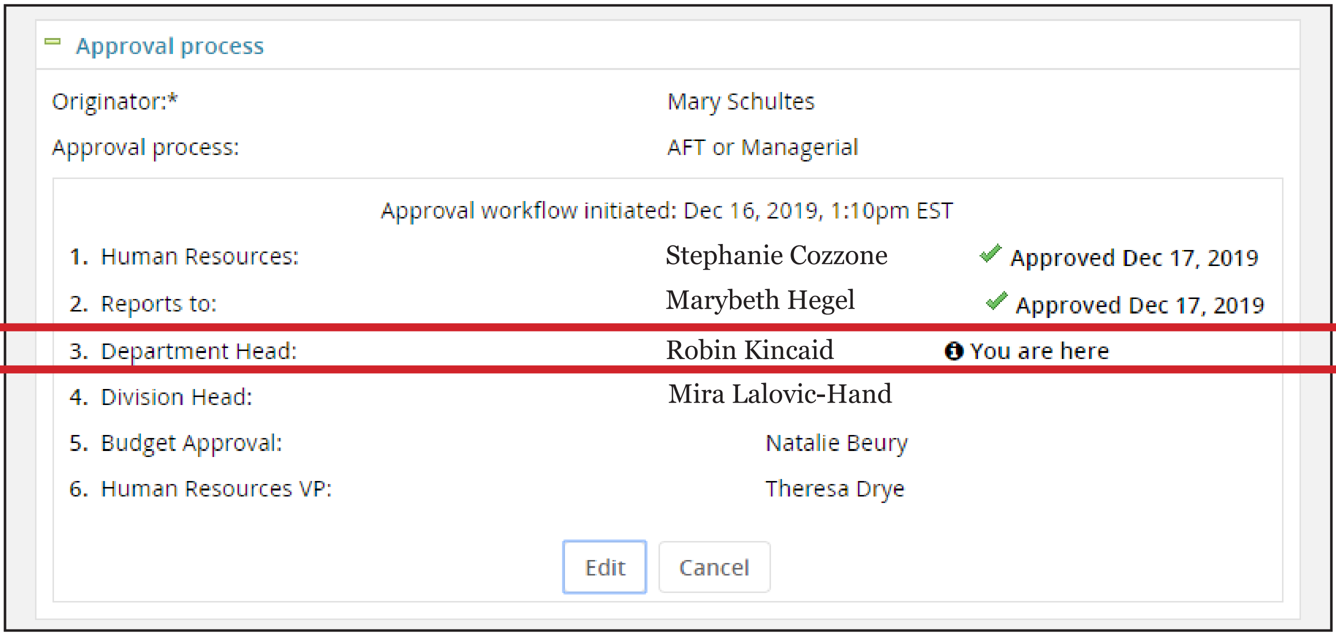




If a document is needed in your job card, choose the **Documents** tab at the top of the page. Choose the Select drop down menu and select **Document from file** to upload a document from your computer. Do not use **Document from library**. If you need to upload another document, choose **Save and add another.**




When the job card is complete choose **Save and close**. This will push the job card to the approver for approval. You will receive an email indicating the job has been approved once this is complete. While a job card can be initiated by anyone, the position is subject to the approval process.




## JOB CARD APPROVAL PROCESS

Once you have submitted a job card, it will go through the approval process. In PageUp you can see where the job card is in the approval process.

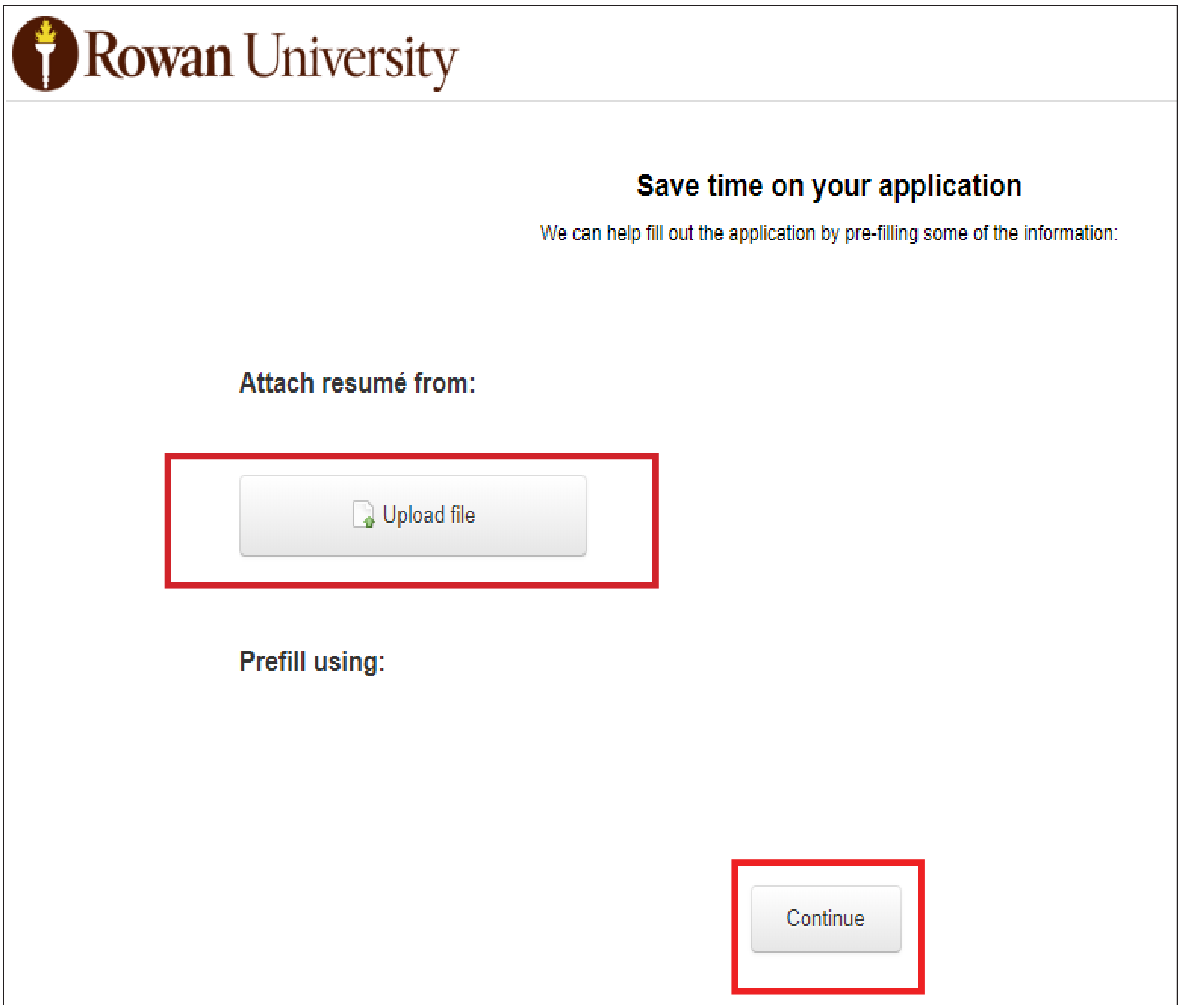
Green check marks show who has approved the position, and a gray mark will show where the position is currently within the approval process.

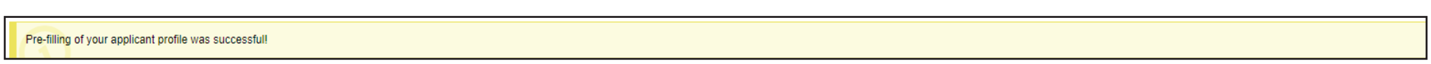
# APPLICANT PROFILE AND EXPERIENCE

# APPLICANT PROFILE

When positions are available, they will be posted on the Rowan career website, https://jobs.rowan.edu/. An applicant can read the position description and choose to apply from the website. Once the applicant chooses to apply they will be prompted to enter some basic information and select a password. The email the applicant uses will serve as their username. This allows the applicant to fill in some information and save the application for later if it is not complete. Throughout the application they will have the opportunity to **Save and Continue** to the next section, or **Save and Exit** and complete the application later.

The applicant will be prompted to upload a resume, making it easier to complete a job application. If the upload is successful, many of the application fields will be automatically completed based on the information in the resume.

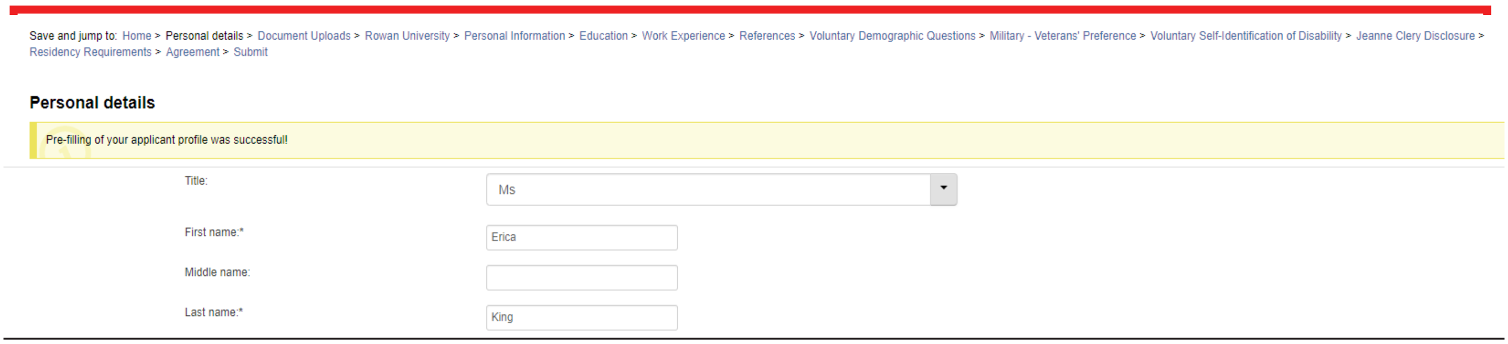


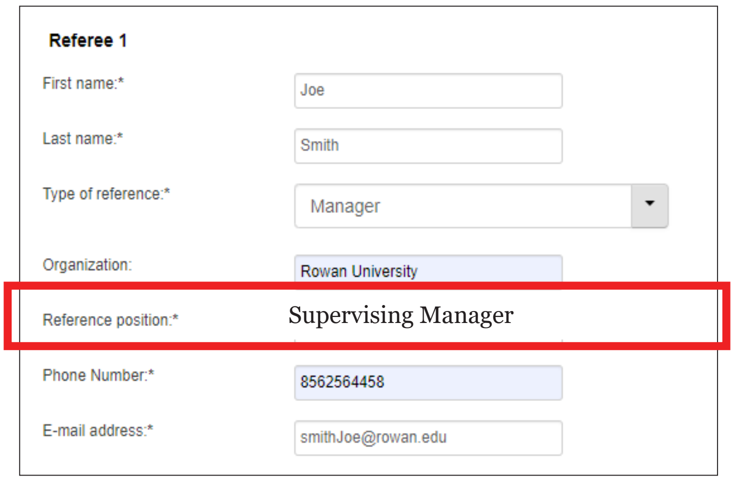




## UPLOAD YOUR RESUME SCREEN

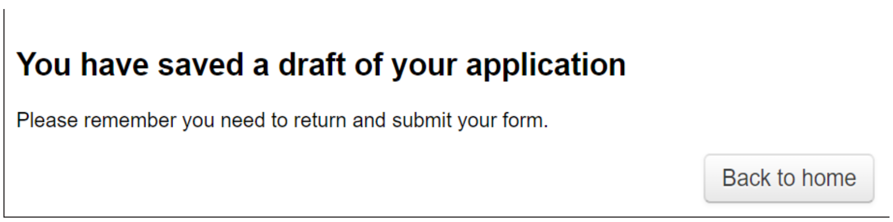
# APPLICANT PROFILE NAVIGATION

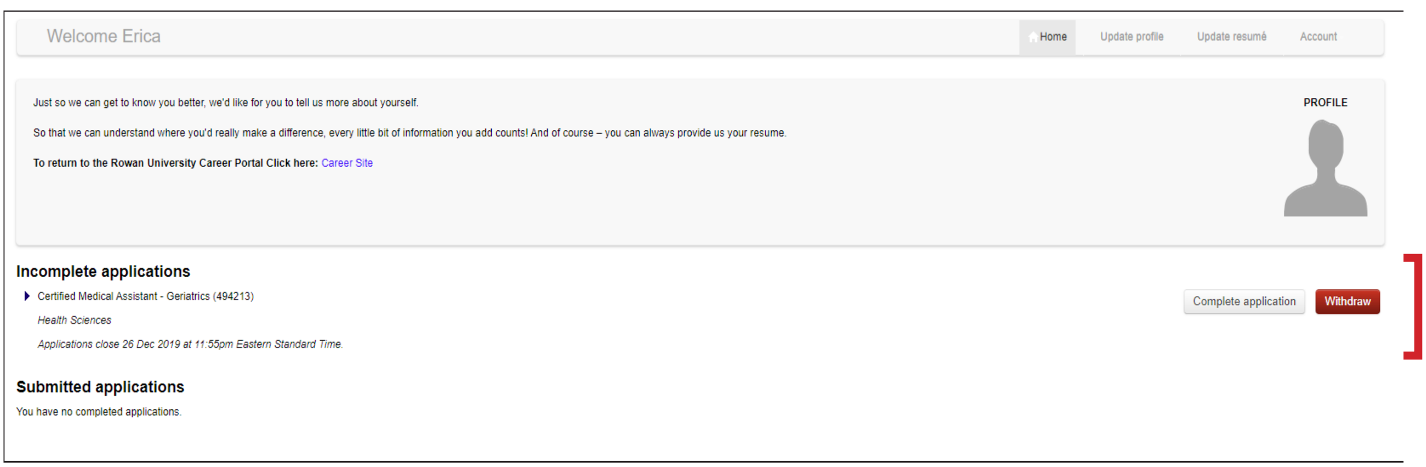
Applicants can move through the application using the breadcrumbs at the top of each screen. They can choose to fill in the information they have and save the application for another time. When the applicant returns to the website they will log in and see an application they have begun and have the opportunity to continue working on it. An applicant can also choose to withdraw the application from the system. In process applications that have not been completed will be logged in the PageUp candidate pool, but will not be viewable by the search committee until they have been completed by the candidate.



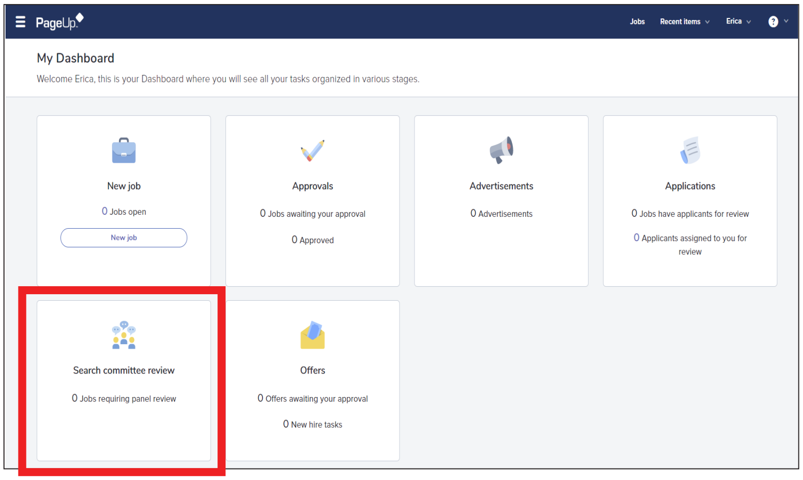

Applicants may ask about this field. The **Reference Position** should be the job title of the referee.



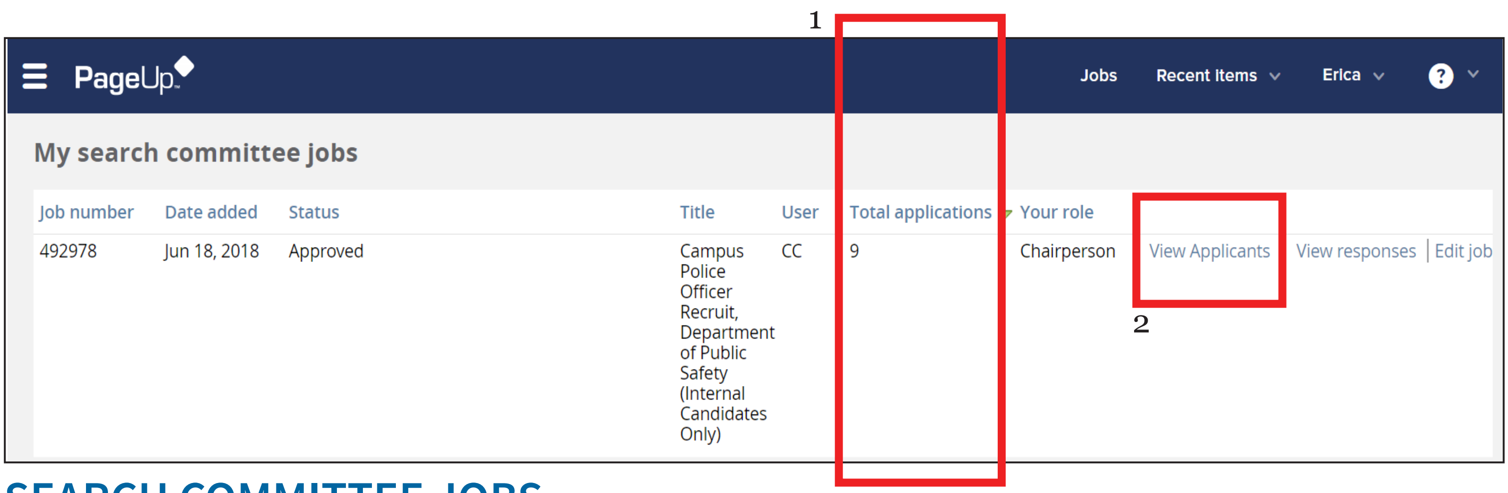

## CANDIDATE NAVIGATION SCREENS

# SEARCH COMMITTEE REVIEW APPLICANTS




As a search committee member, you will need to review candidates. Choose Search Committee Review from the dashboard. If you are on a search committee, the position will be listed.

## SEARCH COMMITTEE DASHBOARD



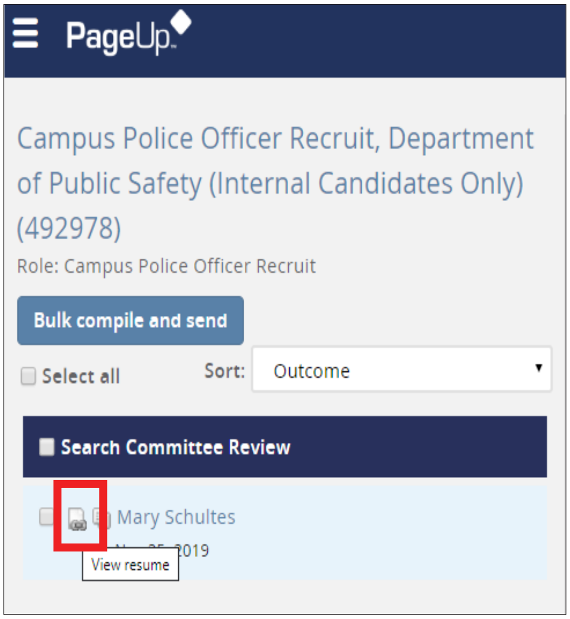

## SEARCH COMMITTEE JOBS

1. You can see how many applicants there are for a given position under the total applications column.

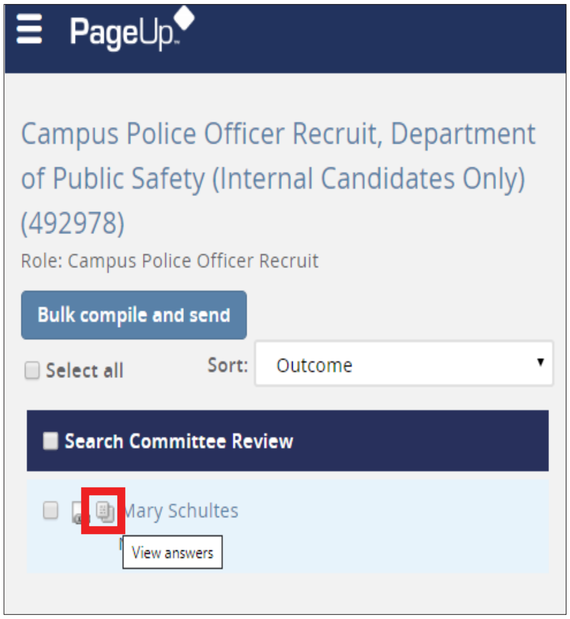
2. Choose **View Applicants** to see the current candidates. The system will show the total number of candidates on this screen, however, when you view applicants, the system will only show you those in a complete and active status. Applicants who have begun an application for the position but have not completed and submitted the application, those who have withdrawn their application, or those deemed ineligible will be counted in this number but will not show when **View Applicants** is chosen.

3. This position is listing 9 total applications. When **View Applicants** is chosen, there is only one candidate to view. This means 8 other applicants are not in an active, viewable status. For those with incomplete applications, they have until the job closing to complete and submit their application. Once the closing date and time has been reached, no applicant can submit their application, even if they began it prior to the job closing date and time.

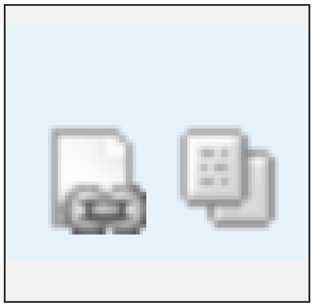
# SEARCH COMMITTEE REVIEW APPLICANTS



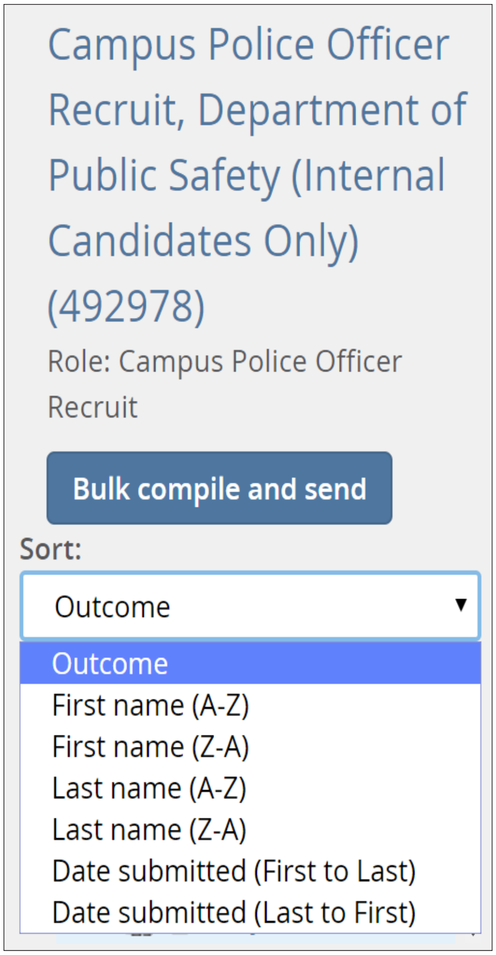

## VIEW RESUME




## VIEW ANSWERS

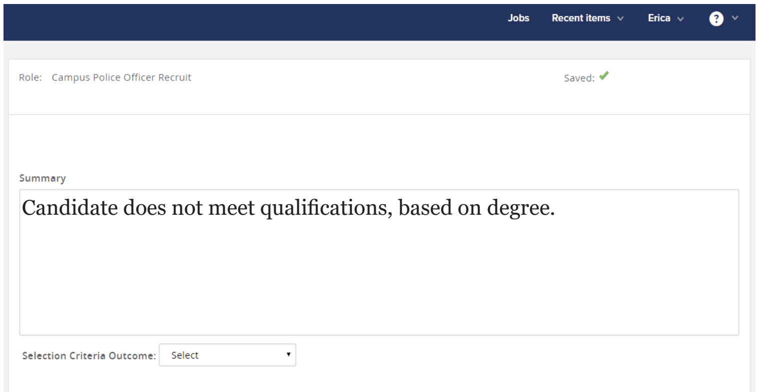


**View Resume** will open the candidate's resume.
**View Answers** will open the candidate's application. They do not always have the same information.

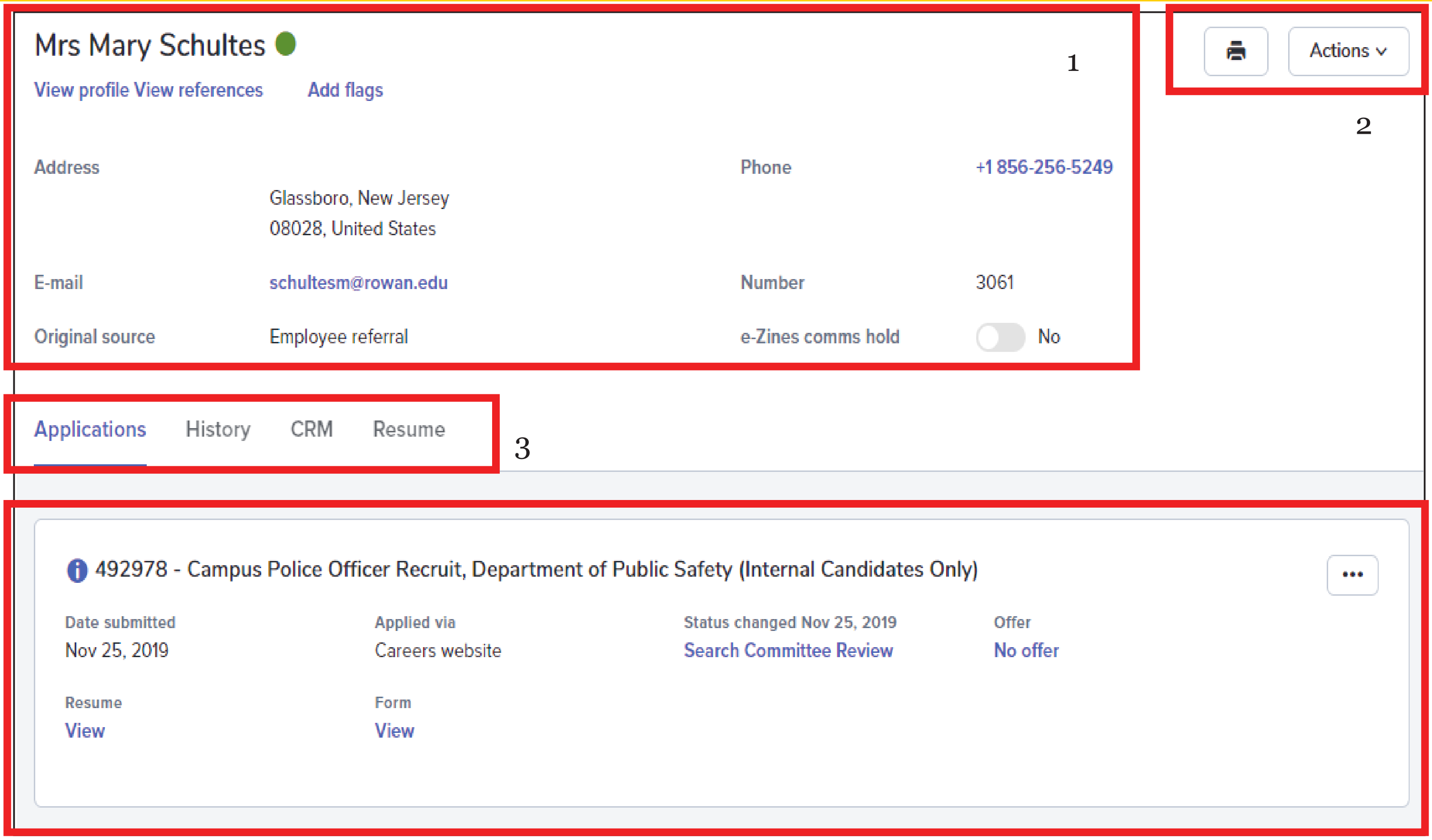



For a position with many candidates, PageUp offers a way to sort. Candidates can be sorted in alphabetical order by first or last name, by the date the application was submitted, or by outcome. If you are looking for a particular candidate you can use the find feature of your browser by pressing the Control F (Mac: Command F) keys and typing the candidate's name in. This will locate them on the list, even if their name is not visible without scrolling down.

From this screen you can also add notes under the Summary section, and choose Selection Criteria Outcome. The outcomes include **Does not meet criteria**, **Meets criteria**, and **Exceeds criteria**. Committee members will add appropriate notes and choose whether the candidate meets criteria or does not.

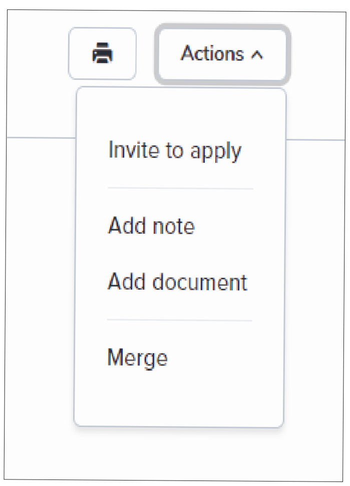



**Anything written in the comments can be used if the search is challenged. The notes should be simple and appropriate. Do not write something you wouldn't want the anyone to see!**




4

## CANDIDATE SCREEN

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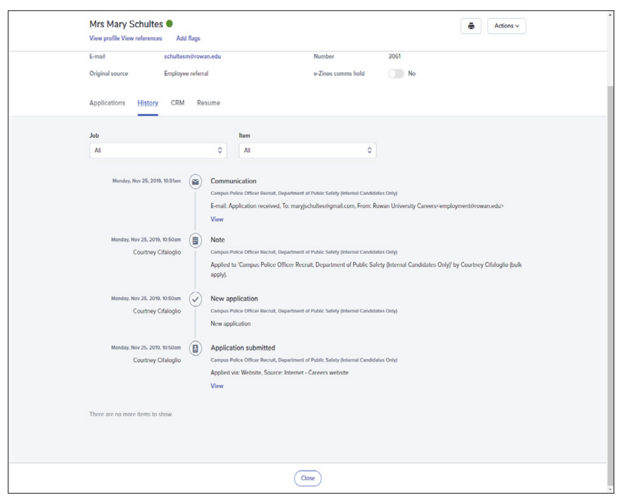
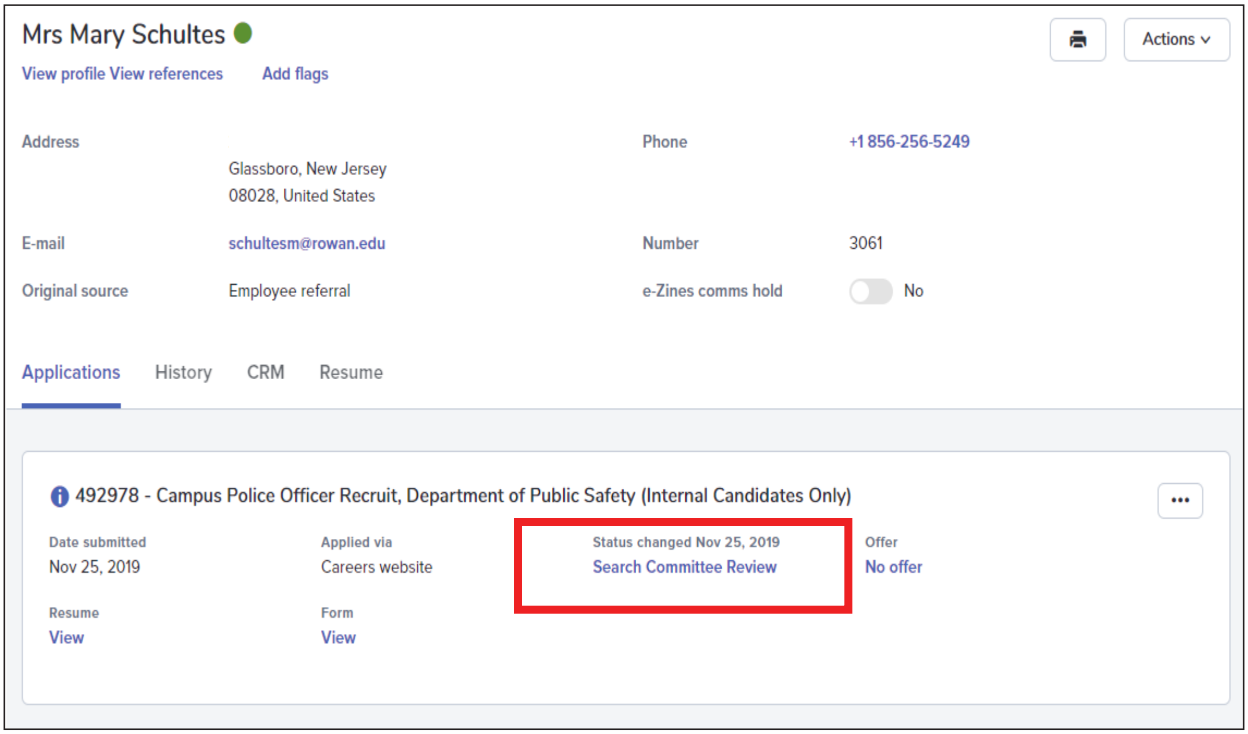



3

If you select the applicant's name, you will see their personal information and any current or past positions they have applied for.  Past positions will only show if you were also on that search committee and have permission to view the information associated with the search.  The applicant's resume will also be available if the link is chosen.

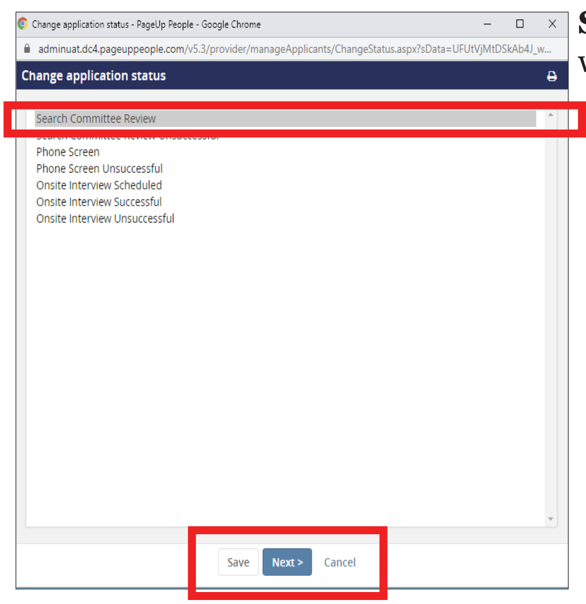
1. Candidate information
2. Action and print menu
3. Candidate Applications, Candidate History, Resume
4. The current position and application

# CHANGE STATUS




## CANDIDATE SCREEN

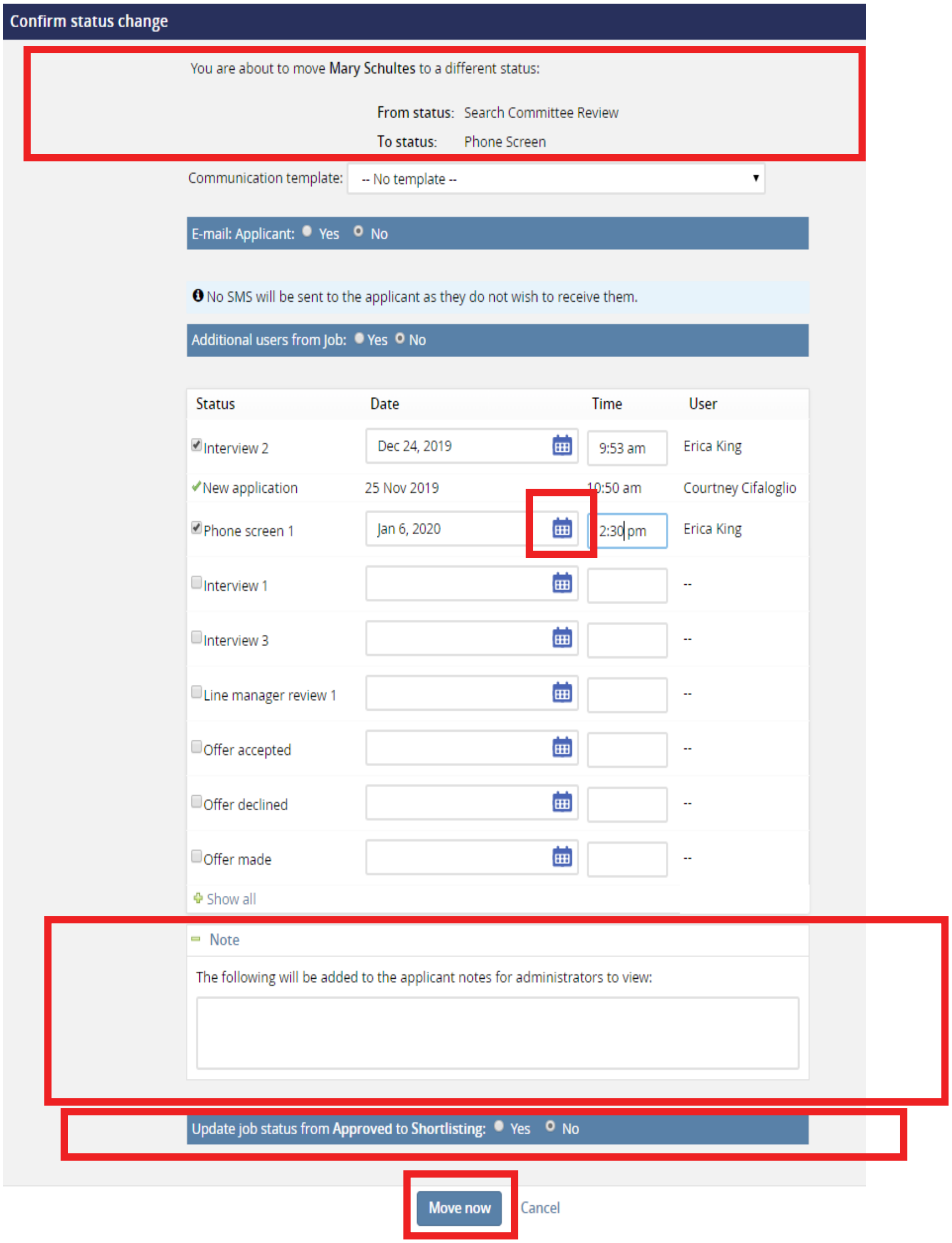
The Committee Chairperson or HR representative will change the status of each candidate and move ahead with candidates from reviewing to interviewing. The Chair will be responsible for this task, not the committee members. Select the applicant's name and a pop-up screen will appear with the candidate's information. To change the status, choose **Search Committee Review**.




**Search Committee Review Unsuccessful** - The candidate will not be progressing in the search. Choose **Save**.

The candidate's status needs to be updated throughout the process. For each candidate that progresses past a phone screen, in addition to changing the status of the candidate, an **Interview Feedback** form must be filled out for any interviews conducted with the candidate. Changing the status of the candidate is a separate process from filling out an **Interview Feedback** form. Both processes must be completed.

# PHONE SCREEN STATUS




When you move a candidate to the status **Phone Screen,** you will enter the date of the phone screen, add appropriate notes if necessary, update the status and choose **Move Now**.

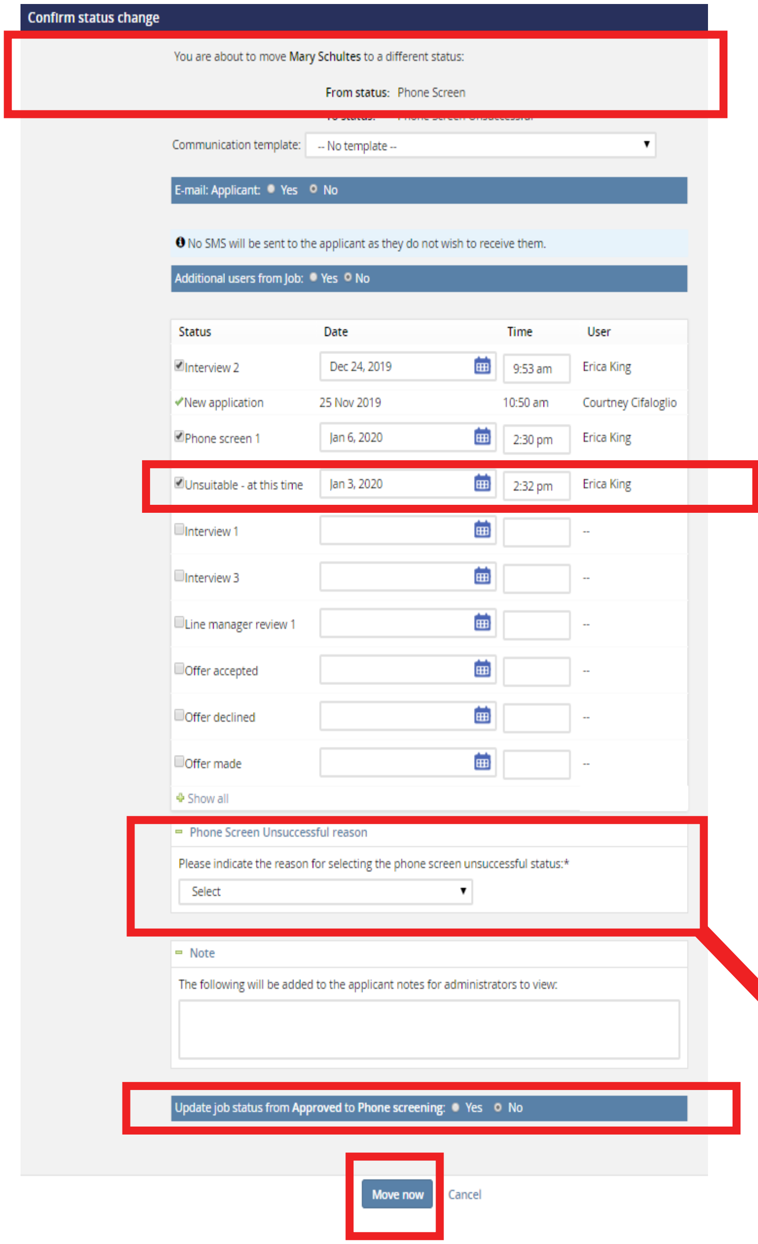
To enter dates, click the calendar icon and choose the correct date.

Remember to keep notes appropriate and do not add any notes you would not want someone to see.

## PHONE SCREEN STATUS CHANGE

# PHONE SCREEN UNSUCCESSFUL

When you move a candidate to the status **Phone Screen Unsuccessful,** you will enter the date of the unsuccessful phone screen, choose a reason, add appropriate notes if necessary, update the status and choose **Move Now**.

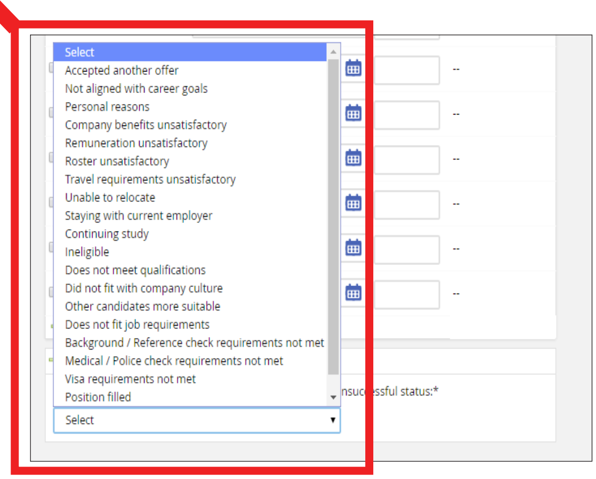



PHONE SCREEN UNSUCCESSFUL

To enter dates, click the calendar icon and choose the correct date.

Choose a reason from the drop down menu.

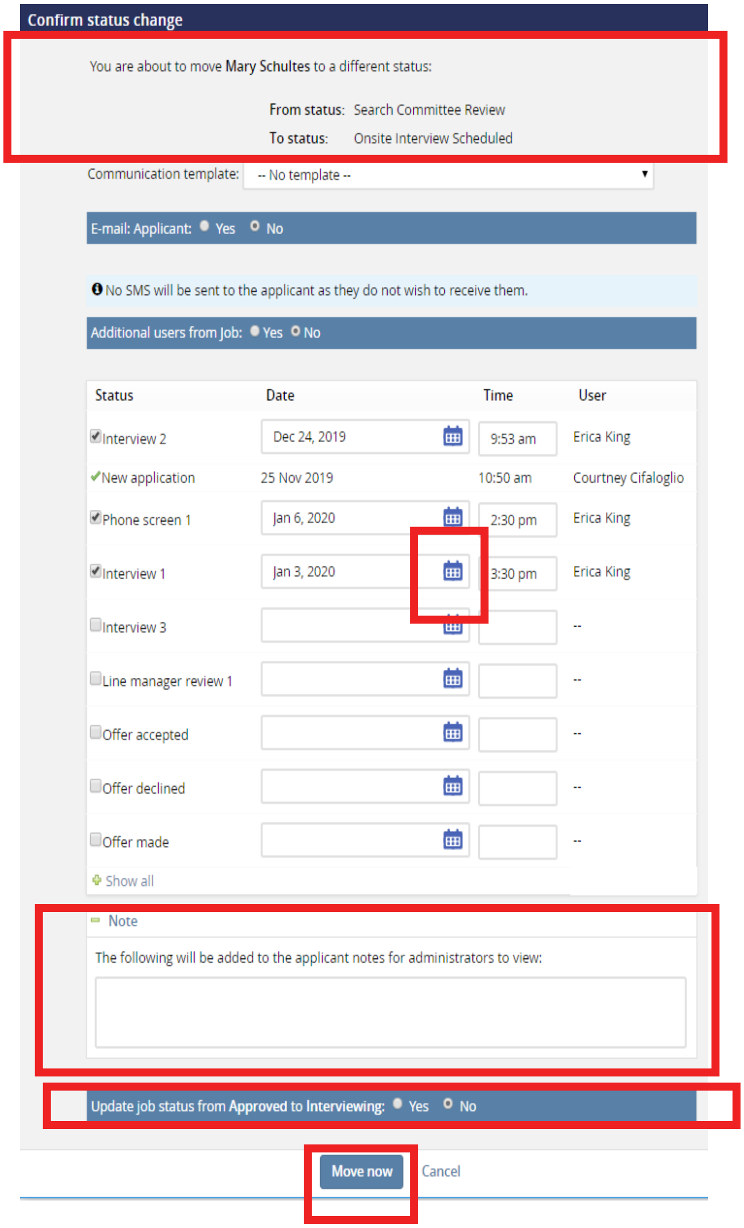
Remember to keep notes appropriate and do not add any notes you would not want someone to see.




SCREEN UNSUCCESSFUL REASONS

When you move a candidate to the status **Onsite Interview Unsuccessful,** you will see the same type of screen. You will choose a reason, add appropriate notes if necessary, update the status and choose **Move Now**. For **Onsite Interview Unsuccessful** you must also complete an **Interview Feedback** form.

# ONSITE INTERVIEW SCHEDULED



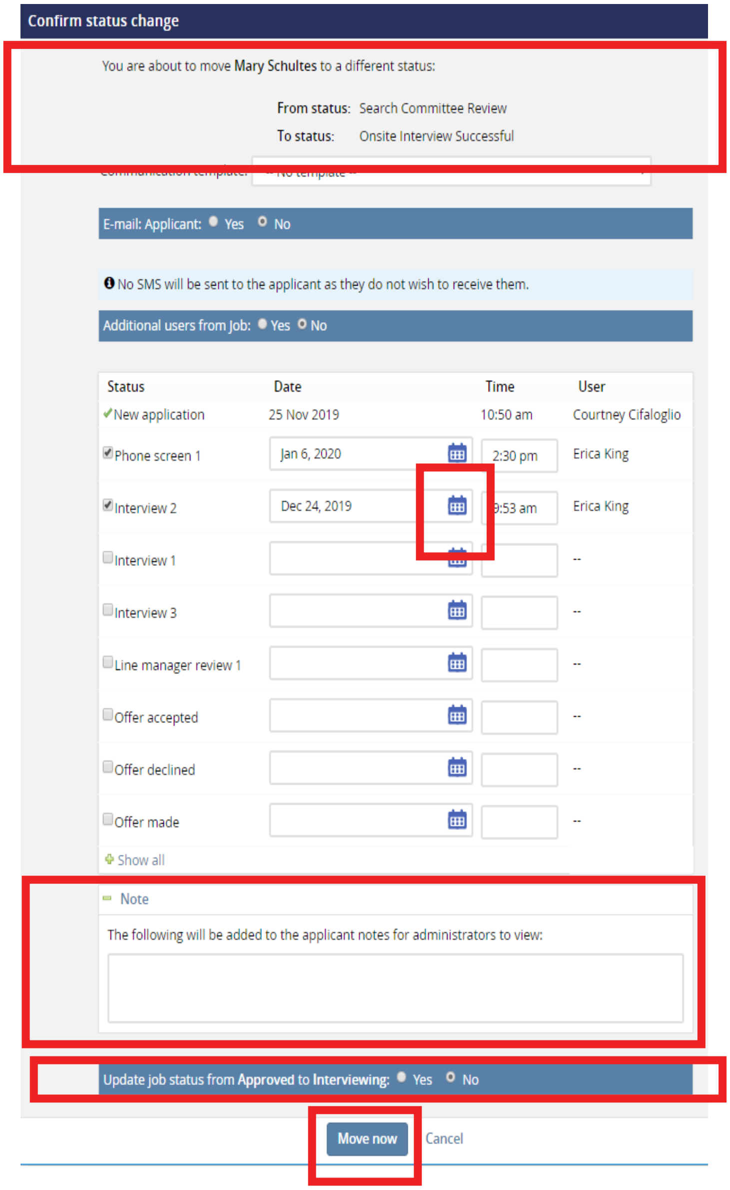

## ONSITE INTERVIEW SCHEDULED

When you move a candidate to the status **Onsite Interview Scheduled,** you will enter the date of the interview, add appropriate notes if necessary, update the status and choose **Move Now**.

To enter dates, click the calendar icon and choose the correct date.

Remember to keep notes appropriate and do not add any notes you would not want someone to see.

# ONSITE INTERVIEW SUCCESSFUL




When you move a candidate to the status **Onsite Interview Successful,** you will enter the date of the interview, add appropriate notes if necessary, update the status and choose **Move Now**.

To enter dates, click the calendar icon and choose the correct date.

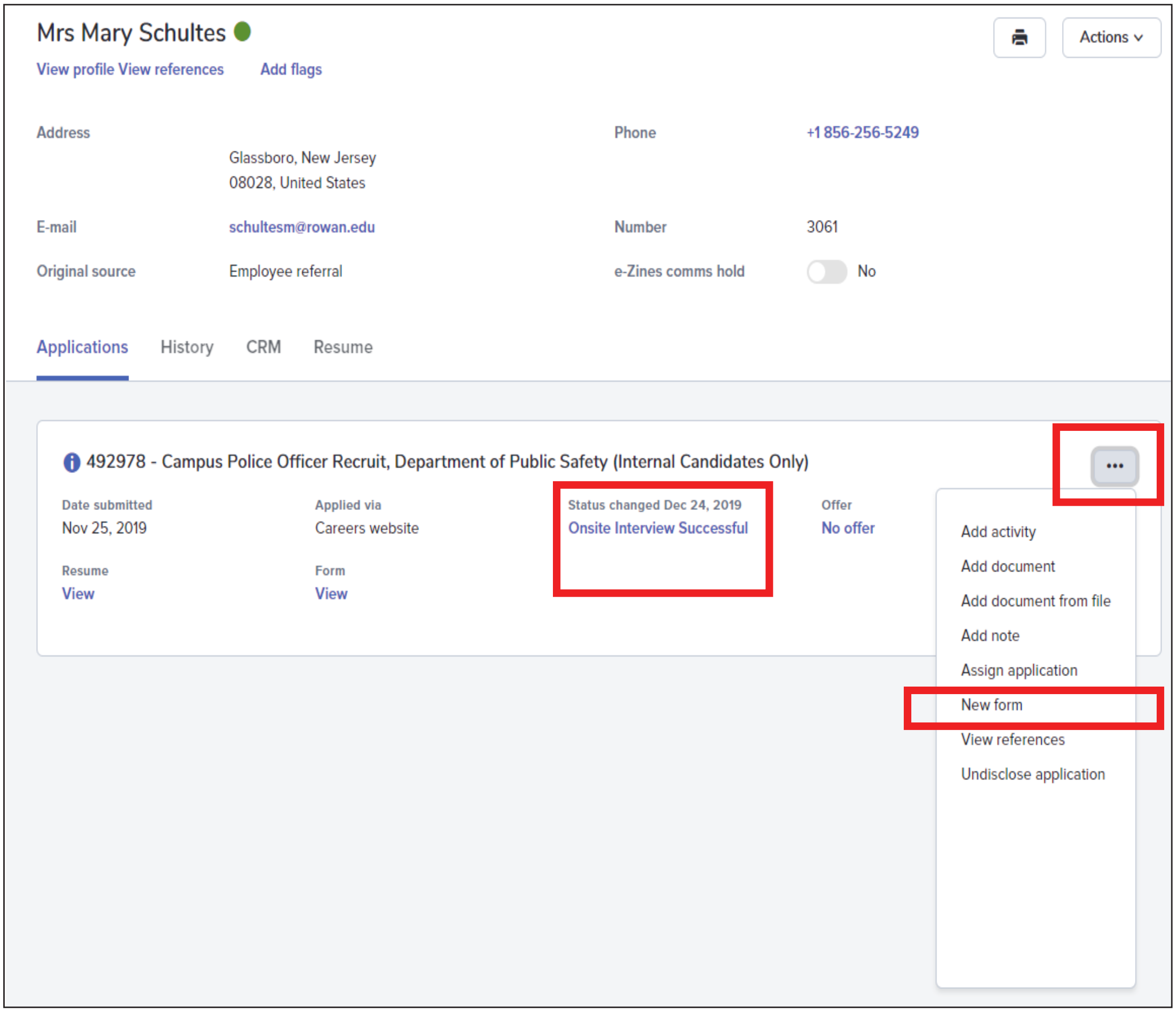
Remember to keep notes appropriate and do not add any notes you would not want someone to see.

ONSITE INTERVIEW SUCCESSFUL

When you move a candidate to the status **Onsite Interview Successful,** you must also complete an **Interview Feedback** form.

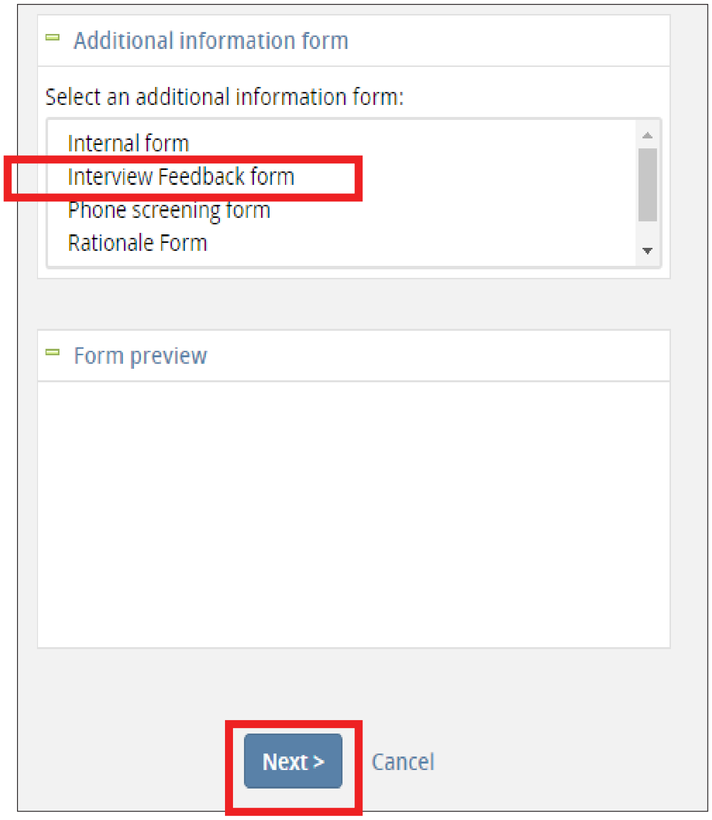
# FORMS

In addition to changing the status, a form must be completed for all interviewed candidates. Select the applicant's name and a pop-up screen will appear with the candidate information. Choose the three dots. Then choose **New Form**.




NEW FORM OPTION

**Contact your Human Resources Recruiter prior to filling out a Rationale Form.**

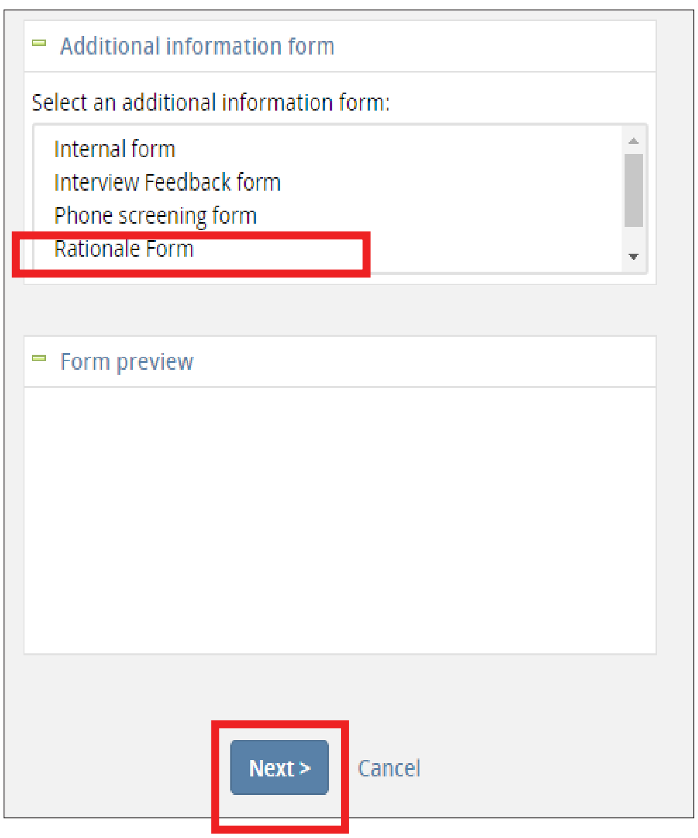



Select the Interview Feedback Form while you are still interviewing candidates, providing a form for each interview.

Select the Rationale form when the candidate desired has been chosen.

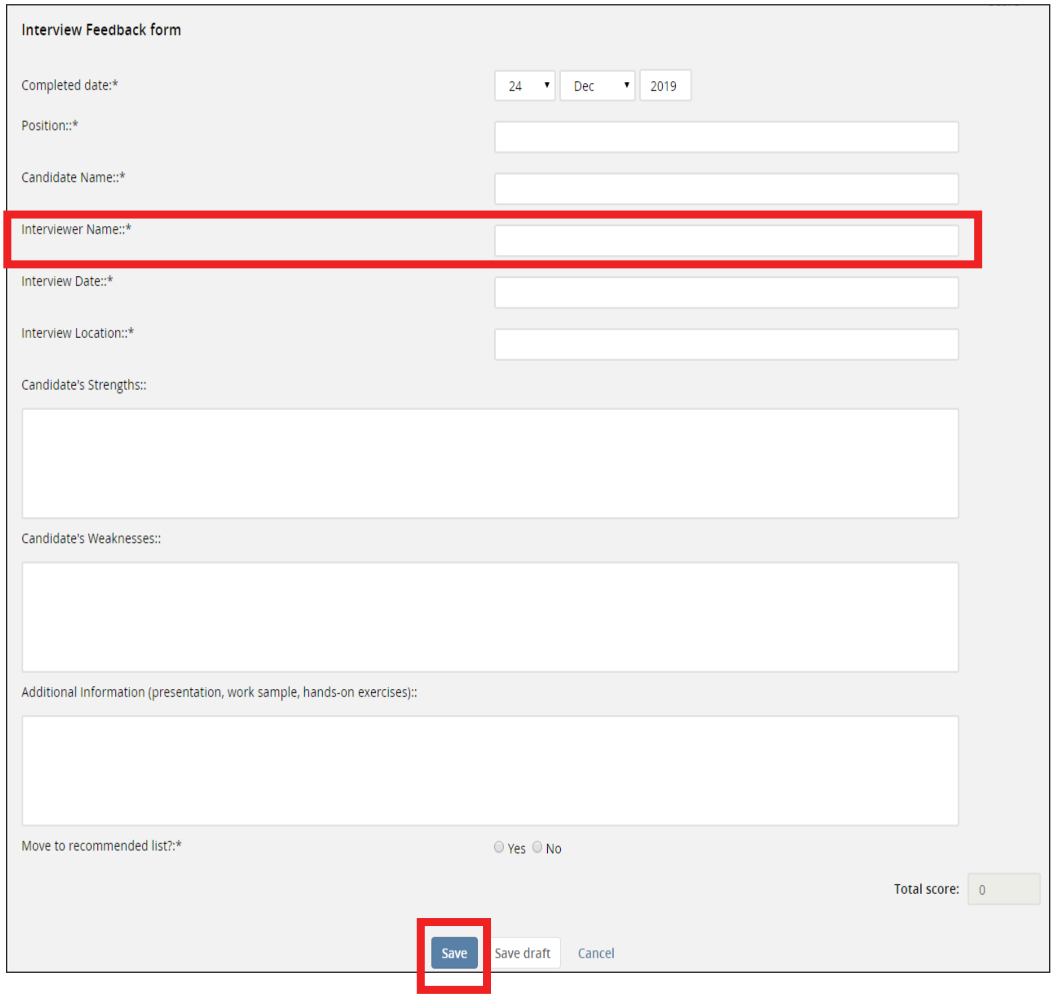
Chose **Next** and it will enlarge the form.

Each interview must be followed by a **Interview Feedback** Form.




When a candidate is chosen, contact your Recruiter as a first step. Then fill out a Rationale Form. If you have notes you want added to your forms, contact your recruiter and they can attached the scan documents to the form.

**Contact your Human Resources Recruiter prior to filling out a Rationale Form.**



Interview Feedback form

Completed date:* 24 Dec 2019

Position::*

Candidate Name::*

Interviewer Name::*

Interview Date::*

Interview Location::*

Candidate's Strengths::

Candidate's Weaknesses::

Additional Information (presentation, work sample, hands-on exercises)::

Move to recommended list?:* Yes No

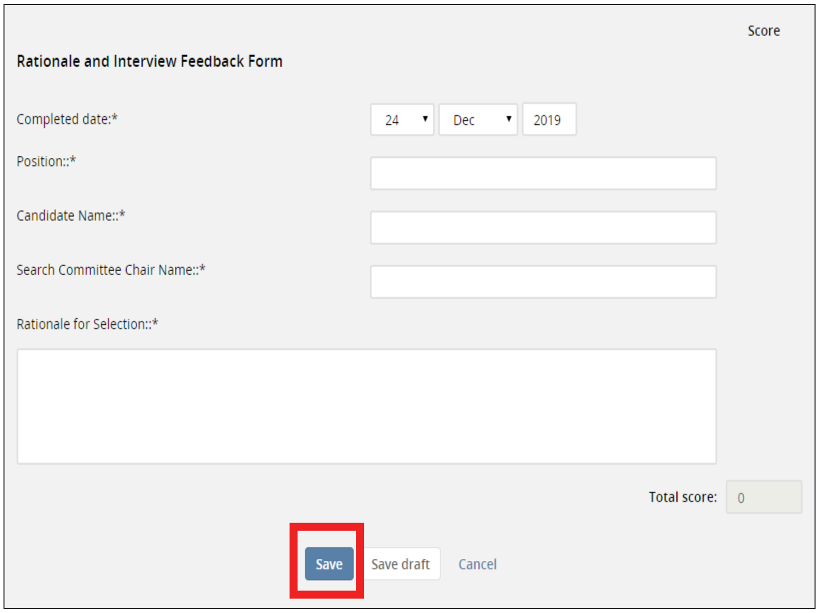
Total score: 0

Save Save draft Cancel

**Search Committee** can be chosen for **Interviewer Name**. The form must be completed and saved.

* If you are unsure how to complete the form or have a question about the content, please contact HR for assistance.

## INTERVIEW FEEDBACK FORM



Score

Rationale and Interview Feedback Form

Completed date:* 24 Dec 2019

Position::*

Candidate Name::*

Search Committee Chair Name::*

Rationale for Selection::*

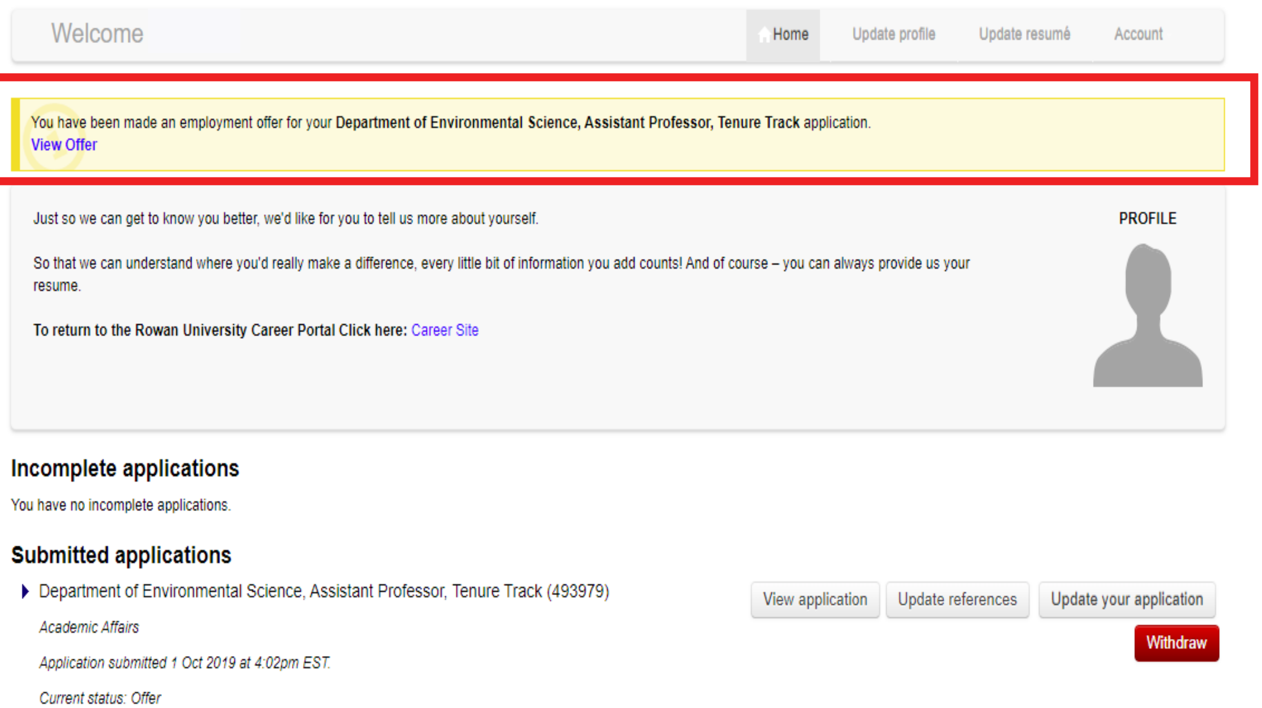
Total score: 0

Save Save draft Cancel

Checking references is suggested when hiring a candidate for a new position. If you would like to initiate a reference check through PageUp, contact your Human Resources Recruiter.

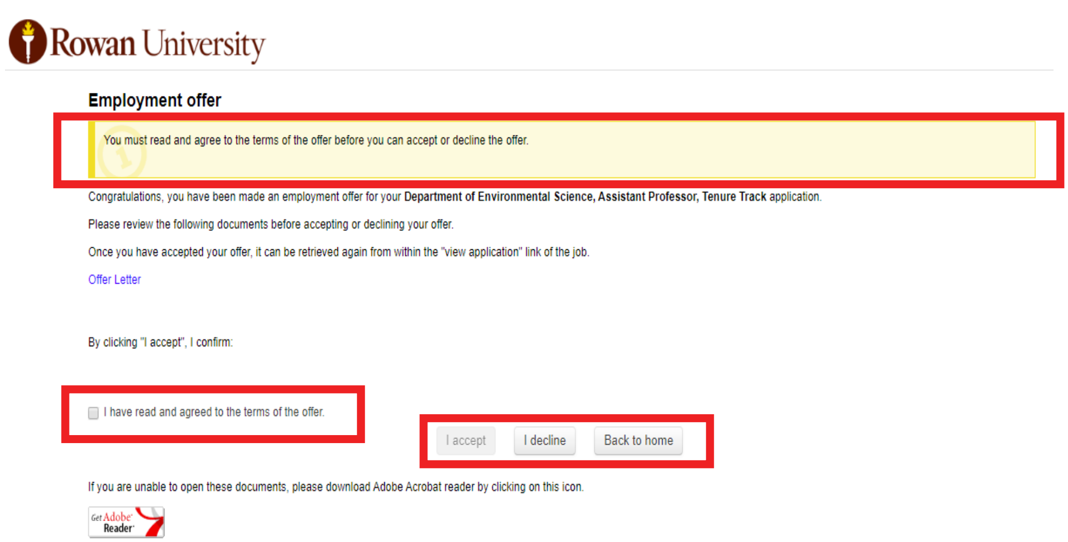
Please note that if the recruitment process chosen in the job card was **Faculty Recruitment - Automatic Reference Check (Main Campus Only)**, reference checks will automatically begin as soon as an applicant completes and submits their application.

## RATIONALE FORM

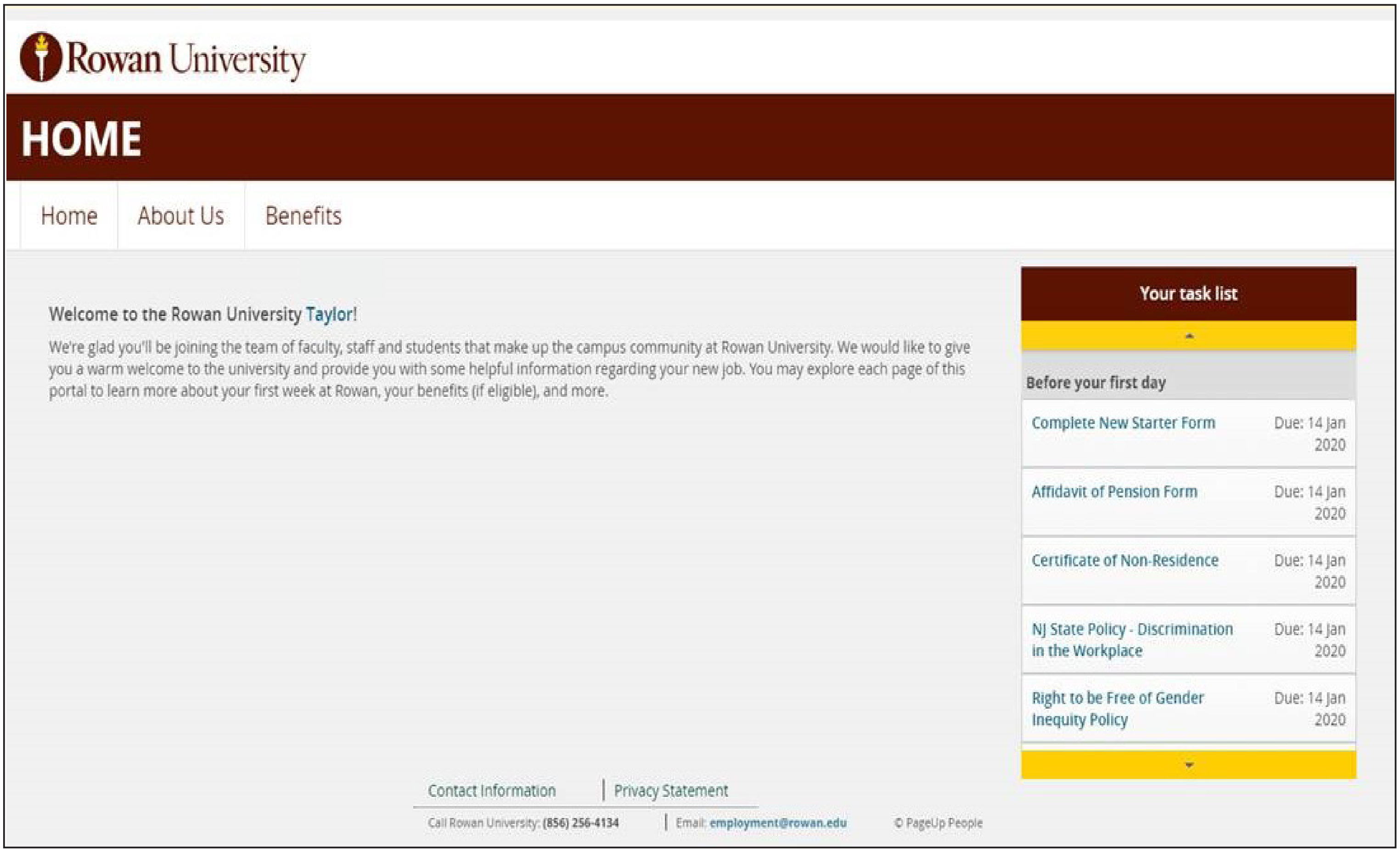



## APPLICANT OFFER ALERT

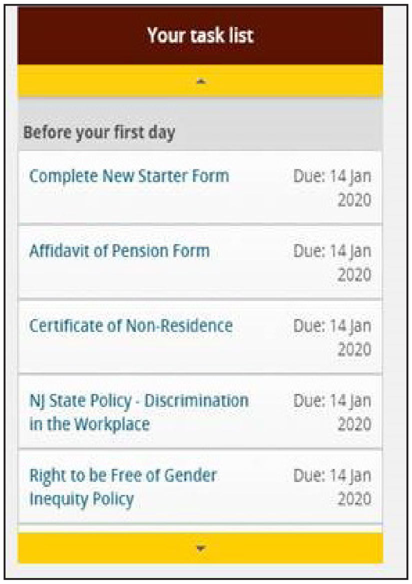
After a candidate has been chosen and the **Rationale Form** has been submitted, the recruiter will generate an offer card. Upon final approval of the offer card, the candidate will be emailed instructions to review the offer in their account. The candidate will be able to view the offer letter from the applicable link on this screen. When the candidate reads and agrees to the offer as provided in the **Applicant Portal**, they must check the appropriate box. The offer must be accepted in the portal before onboarding commences. Most or all of the onboarding forms will be available in the **Employee Portal**, accessible to the new hire prior to their start date. Some forms may need to be submitted in person.




## OFFER LETTER LINK FOR APPLICANT




## EMPLOYEE PORTAL




When a new employee logs into the Employee Portal they will see a checklist of documents under the **Task List**. As each form is completed, a check mark will appear to the right of the form name and a line will appear through the name of the form. The **Task List** serves as a confirmation of the documents a new employee needs before the onboarding process begins.

## TASK LIST

# ADDITIONAL RESOURCES

**Helpful Email Addresses**

Recruitment and Staffing *employment@rowan.edu*
support@rowan.edu (technical questions about Banner/Network/your computer)
irt-training@rowan.edu (questions about training sessions or training resources)

**Helpful Webpages**

Human Resources: http://www.rowan.edu/hr
Budget http://www.rowan.edu/adminfinance/budget/
Information Resources and Technology http://www.rowan.edu/irt
Training Services – Information Resources and Technology
http://irt.rowan.edu/services/training/index.html
Free Online Training Library http://irt.rowan.edu/services/training/linkedinlearning.html