WASHINGTON STATE UNIVERSITY | Department of Human Resource Services

Complete Online Position Description and Recruitment System (OPDRS) Packet

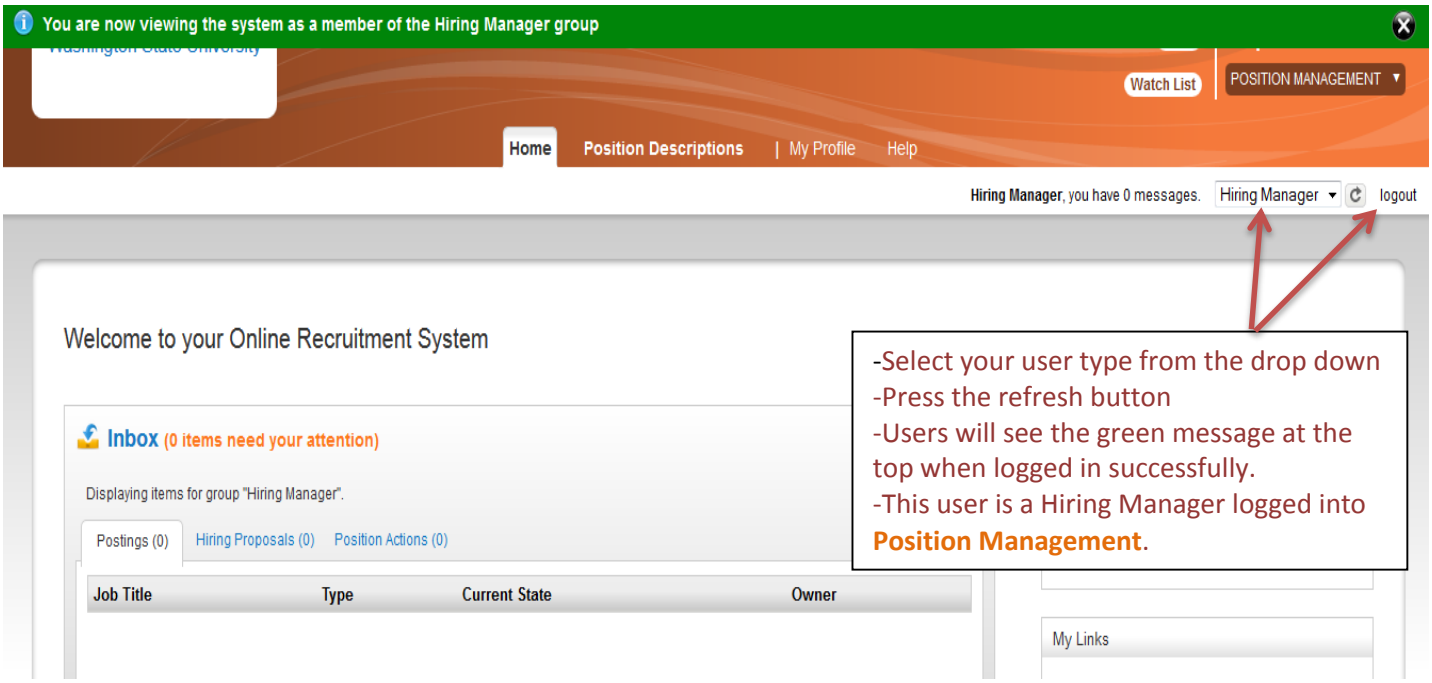
This packet will provide an overview of the following actions:

Logging In

When a new user account is created for an individual, they will be supplied with their username. ***Usernames and passwords in OPDRS are different than University Network ID's and passwords.*** The first time a new user logs in, they will be asked to reset their password.

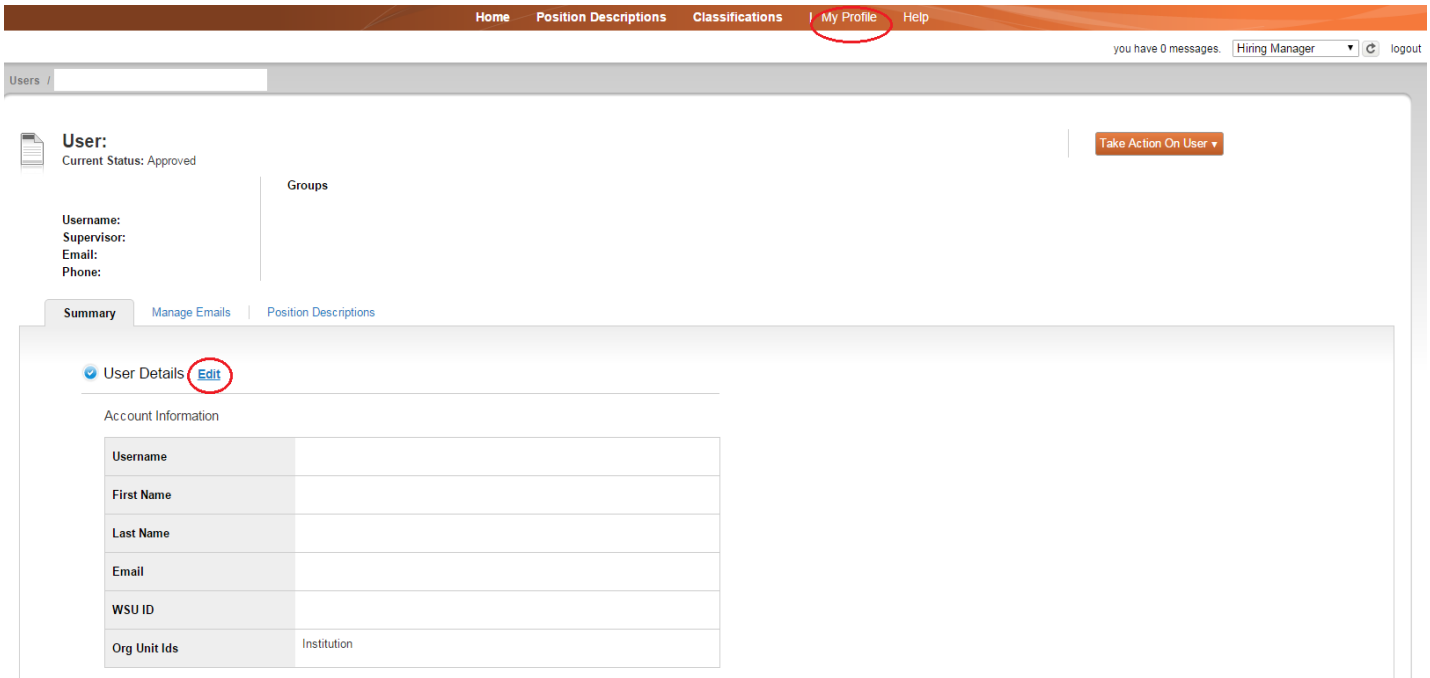
Once logged into the system, users will be able to quickly and easily identify the module they have logged into based on color. Position Management (orange) is used to create new positions, modify existing positions (including salary stipends and increases), and to create position reports. Applicant Tracking (blue) is used to post jobs, manage applicant pools, and create recruitment related reports.

Users are automatically logged in as an "Employee". Users will need to use the drop down to identify their user type. Each user is assigned only one user type.



My Profile

Users can change their default settings, including the module and user type they are automatically logged into, by selecting My Profile and editing their User Details.



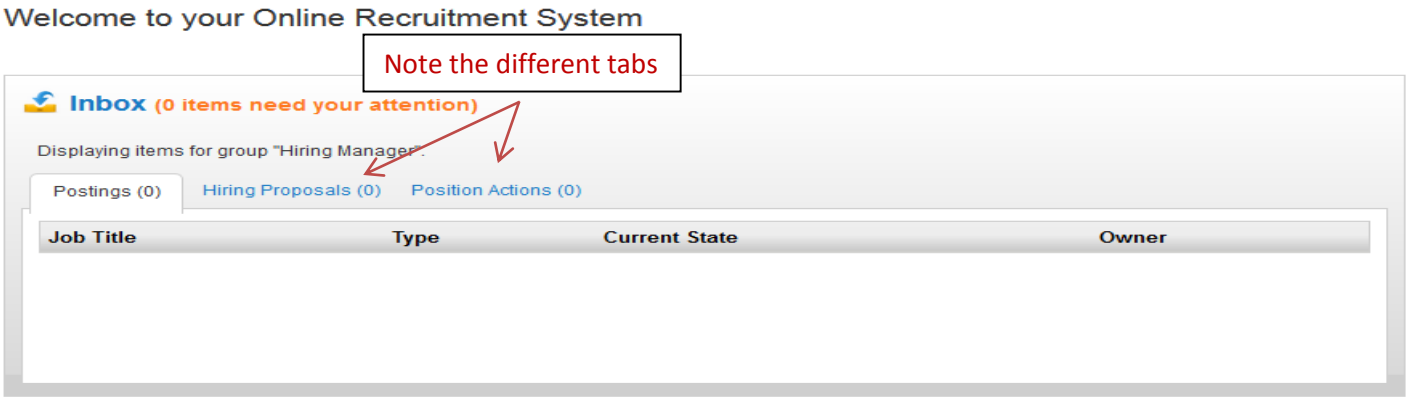
1. Select “My Profile” at the top of the page.
2. You will see User Details, such as your username an email address.
3. Select Edit
4. **Preferred Group On Log In**: this is the user type you are automatically logged into. You will want to change this from Employee.
5. **Default Product Module**: this is the module you are automatically logged into. Choose either Position Management or Applicant Tracking depending on what you will need most.

Features and Functionalities

OPDRS offers a variety of new and efficient ways to improve Washington State University's position management and applicant hiring and tracking processes. Actions previously entered into the Position and Travel Exemption Request System (PTERS), such as requests for permanent positions and salary increases for all employees on any fund type, are now entered in OPDRS. Please find below a list of new features and functionalities to look for when logging into OPDRS.

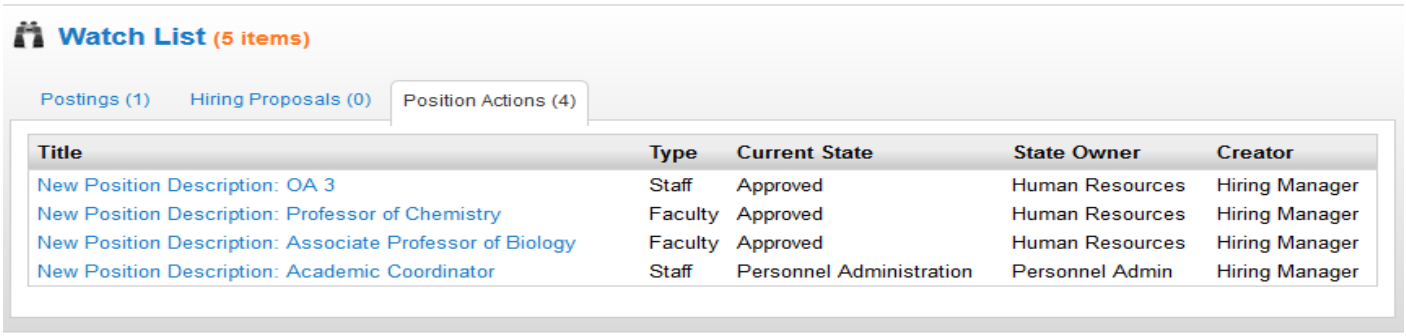
Inbox

The Inbox serves as a general notification system within OPDRS. Any items requiring a user's attention is listed in this area. For example, a position description that requires Hiring Manager review will be listed. Once the action is advanced in the workflow and out of the user's responsibility, it will fall off the Inbox.



Watch List

The Watch List is utilized to track selected positions and postings within OPDRS. Users may want to use this tool to keep track of a position or posting they know they will need to visit frequently throughout the position approval and hiring process. Users have the option to select the action item "Add to Watch List".



Creating a New Position Description

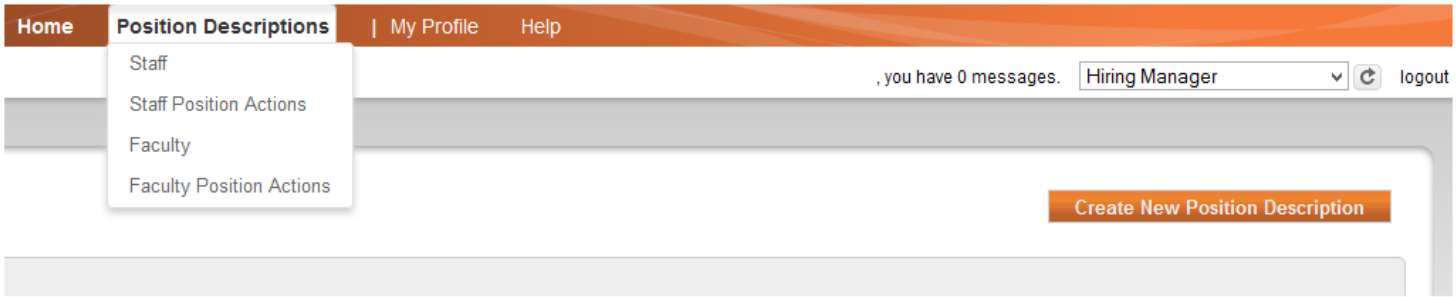
Staff

The Create New Position Description action is used to create new position descriptions that are not currently held in OPDRS.

1. Verify you are in the Position Management module as a Hiring Manager, Personnel Admin, or Appointing Authority.

2. Hover over Position Descriptions and click on **Staff**. Staff is used for Classified Staff and Administrative Professional positions.

3. Click the Create New Position Description button at the top right corner.



4. You will receive a pop-up window to choose the action you would like to start. Click on **New Position Description.**

5. Enter **Working Title**.

6. The **Area** and **Department** sections will default unless you have responsibility for more than one. If you have responsibility for more than one Area and/or Department, you will then select the Area and Department the position will report under from the drop down list.

7. If you have an existing position description within your department(s) you wish to copy or 'clone', choose that position description from the list at the bottom of the page. This will pull in pertinent information from the 'cloned' position description into this action and allow for edits.

8. Click the **Start Position Action** button.

New Position Description

Start Position Actions | Cancel

Working Title

Organizational Unit

Area *: 31-College of Arts and Sciences

Department *: Fine Arts

Clone an existing Position Description?

Filter these results

APPROVED STAFF POSITIONS

Saved Search: **"APPROVED STAFF POSITIONS"** (1 Item Found)

University Title	Working Title	Position Number	College/Area	Department	Status	Last Updated	(Actions)
Office Assistant 3	OA 3	55543	31 - College of Arts and Sciences	English	Active		Actions

9. Title – Is the official University title. Scroll through the titles at the bottom or search for the title by selecting the "Filter these results" button.

10. Continue through the tabs, completing all required information. Please note that if you 'cloned' from an existing position description, many of the fields will be prepopulated and ready for you to edit if applicable. Also note that by clicking the **Next** button, your changes will automatically save. Required fields are noted with red asterisks (*).

11. The following is a list of the sections within new **Staff** positions that will need to be completed.

Editing Position Actions

- Title
- Position Details
- Job Duties
- Essential Work Compete...
- Performance Expectations
- Salary Detail
- Position Documents
- Position Actions Summary

Select the official university title

Enter position details such as position number, effective date, work location, summary of duties, FTE, and term

Duties section now uses a builder to easily identify and edit each section. Enter duties by functional area and include percentages

Essential work competencies are the knowledge, skills, abilities, mental and physical requirements, and working conditions related to the position

Performance Expectations are required for Classified Staff

Requested monthly salary or beginning step for Classified Staff

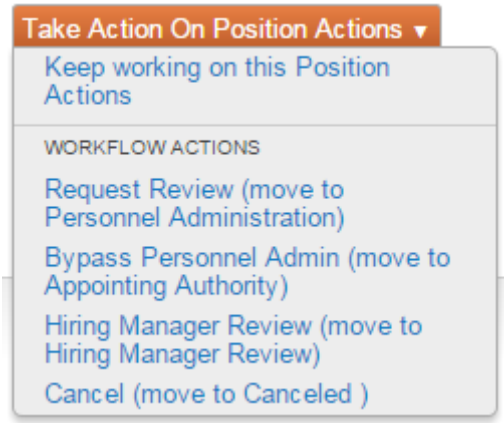
Attach the organizational chart (no org chart is too large). Positions Actions only go to Position Control and is not attached in OPDRS

Summary of all fields in long format

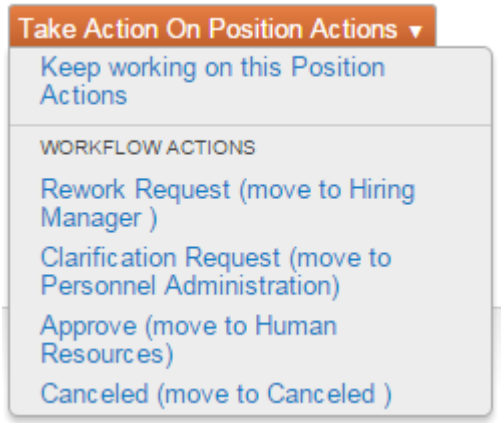
12. After completing all sections, review changes on the *Position Actions Summary* tab. Check all information entered for accuracy and make additional edits if necessary. Completed sections are noted with a blue checkmark , while incomplete sections are noted with an orange exclamation mark .

13. Once all sections are completed, move the action through the workflow by hovering over the Take Action on Position Actions button on the top right hand corner of the page and select the workflow option you wish to take. The actions you can take are determined by your user type.

Hiring Manager view

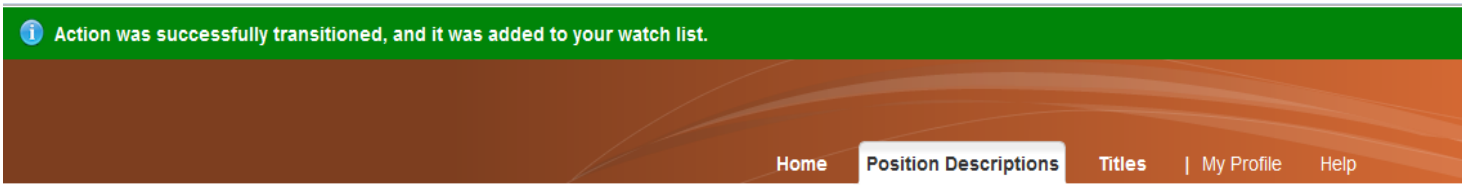


Appointing Authority view



14. A pop-up 'Take Action' window will open in which you can make comments, if needed, which would be sent to the next approver. Please note, comments will be tied to the historical record of the action. Check the box to include the action on your watch list, if needed, and click **Submit**. An email will be sent to the next approver, notifying them of the pending action.

15. You will receive a green bar on the top of your page that will state the action was successfully transitioned.



Faculty

Contact your HR Service Team with the official Title and Position Number. HRS will create the new Faculty position for you and notify you once the position is ready to submit for job posting.

Please note, a PA/PRR must be submitted to Position Control to obtain a new position number and create the position.

An Open Rank title may also be used when the final title may be dependent upon a new hire's experience. The titles under consideration will then be noted under Working Title. Contact your HR Service Team if you would like to use this title or discuss options.

Modifying an Existing Position Description

Staff

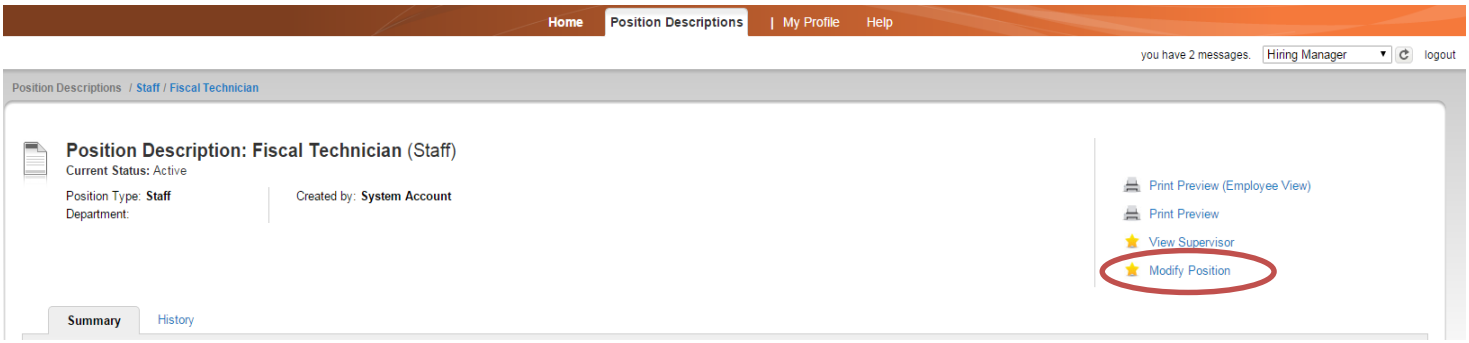
The Modify Position action is used to reclassify positions, request salary increases or stipends, and to update position descriptions.

16. Verify you are in the Position Management module as either Hiring Manager, Personnel Admin, or Appointing Authority.

17. Hover over Position Descriptions and click on **Staff**. Staff is used for Classified Staff and Administrative Professional positions.

18. Near the bottom of the page is a listing of all approved positions in the department(s) you have access to. Select an approved position.

19. Select the **Modify Position** button in the upper right corner.
    a. Note: Positions that have an outstanding action that has not yet been approved or canceled will be locked.



20. You will receive a message on your screen stating the position will be locked once you start the action until the action has been completed. Once finished reading the message, select **Start**.

21. The first tab, entitled **Action Justification**, allows you to select the action you are requesting, along with providing any necessary justifications.
    a. Note: only <u>one</u> modification action should be selected.

    Modification actions are as follows:
    a. **Reclassification – Occupied**: used for reclassifications, including salary reviews due to the reclassification, in which an incumbent will be affected.
    b. **Reclassification – Vacant**: used for reclassifications, including salary reviews due to the reclassification, in which there is no incumbent.
    c. **FLSA Review**: used when classification is not changing, but FLSA is being reviewed.
    d. **AP Salary Review**: used when the incumbent has requested a review of their salary per BPPM 60.12.
    e. **Update Position – Occupied**: used when there is no change to title or salary and in which an incumbent will be affected. This includes changes in FTE or Term.
    f. **Update Position – Vacant**: used when there is no change to title or salary and in which there is no incumbent. This includes changes in FTE or Term.

g. **Salary Increase – 10% or Below**: used when there is no change to title, however a salary increase of 10% or less for administrative professional, or requesting a step increase for classified staff, is being requested.
h. **Salary Increase – Above 10%**: used when there is no change to title, however a salary increase of above 10% is being requested.
    i. Additional approval outside of HRS is required per BPPM 60.12.
i. **Stipend**: used when the department is requesting a stipend for duties performed by an AP employee above and beyond their normal load per BPPM 60.12.

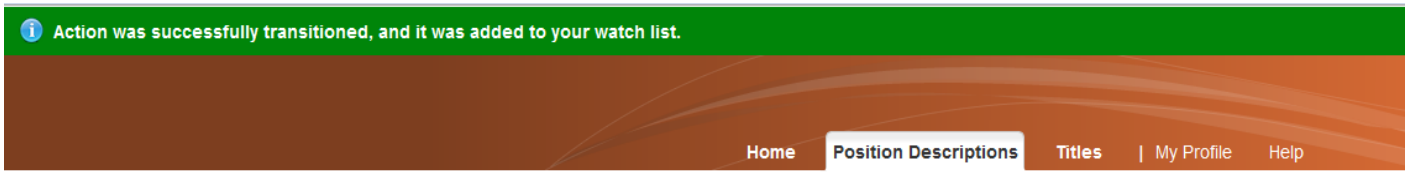
22. Continue through the tabs, making changes and saving as necessary. Note that by clicking the **Next** button, your changes will automatically save. Required fields are noted with red asterisks (*).

23. After completing all sections, review changes on the *Position Actions Summary* tab. Check all information entered for accuracy and make additional edits if necessary. Completed sections are noted with a blue checkmark , while incomplete sections are noted with an orange exclamation mark .

24. Once all sections are completed, move the action through the workflow by hovering over the Take Action on Position Actions button on the top right hand corner of the page and select the workflow option you wish to take. The actions you can take are determined by your user type.

25. A pop-up 'Take Action' window will open in which you can make comments, if needed, which would be sent to the next approver. Please note, comments will be tied to the historical record of the action. Check the box to include the action on your watch list, if needed, and click **Submit**. An email will be sent to the next approver, notifying them of the pending action.

26. You will receive a green bar on the top of your page that will state the action was successfully transitioned.



Faculty

The following Faculty actions are not submitted in OPDRS: salary increases, ADRs/Stipends, position configuration changes, and/or title changes.

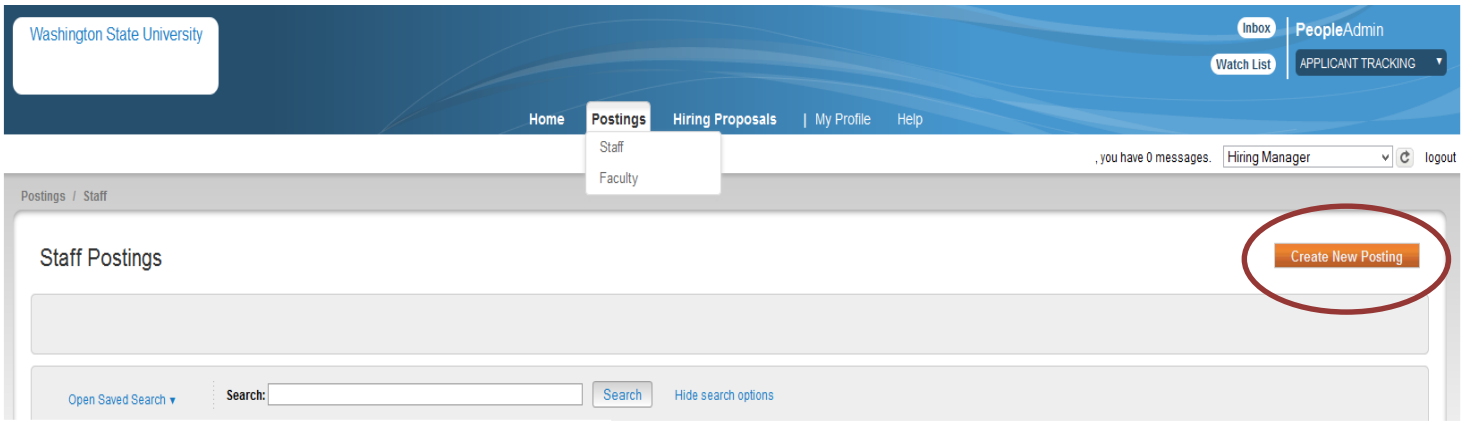
- **Title:** to change a title to a position prior to posting, contact your HR Service Team. HRS will make the change for you and notify you once the position is ready to submit for job posting.
  - Please note, a PA/PRR must be submitted to Position Control to update DEPPS.
  - An Open Rank title may also be used when the final title may be dependent upon a new hire's experience. The titles under consideration will then be noted under Working Title. Contact your HR Service Team if you would like to use this title or discuss options.

Creating a Posting

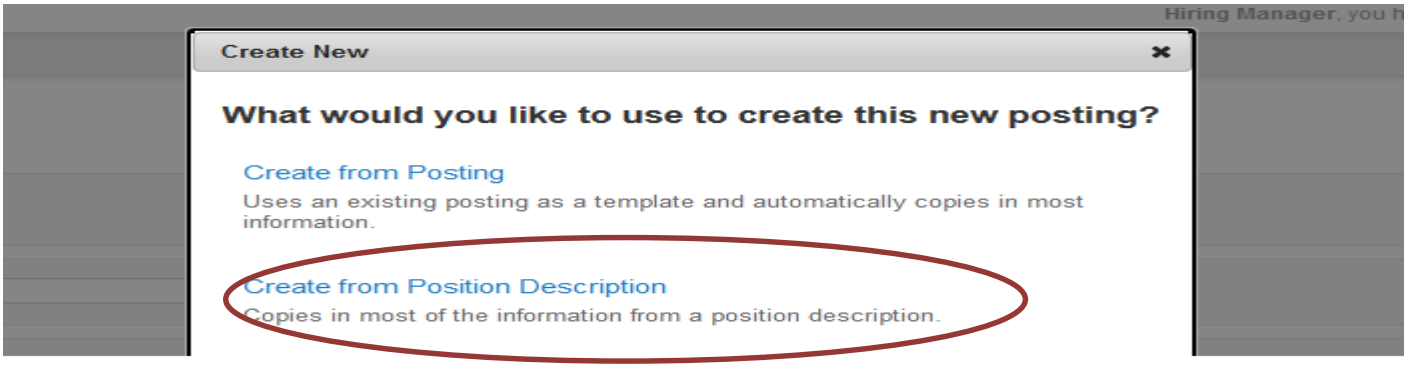
1. Verify you are in the Applicant Tracking module as a Hiring Manager, Personnel Admin, or Appointing Authority.

2. Hover over Postings and click on **Staff** or **Faculty**. Staff is used for Classified Staff and Administrative Professional.

3. Click the Create New Posting button at the top right corner.



4. A pop-up box will open. Choose the "Create from Position Description" option.
   a. Although Faculty do not have traditional position descriptions as Staff do, for purposes of OPDRS, postings begin with a position description.



5. Find the position you would like to post. Hover over **Actions** to see your options:
   a. Select *Create From* to create the posting from the selected position description; or
   b. Select *View* to see the current position description prior to beginning the action. If the selected position description is correct, click on *Create Posting from this Position Description* on the upper right corner.
      i. NOTE: Always review the position description prior to starting the posting. If changes are needed, they will need to be done prior to starting the posting.
   c. If you cannot find the position you would like to post, contact your HR Service Team.

6. Most of the information will auto-populate from the approved position description.

7. Complete all required information in each of the sections which are listed on the left hand side of the screen.

8. After completing all sections, review edits on the *Summary* tab. Check all information entered for accuracy and make additional edits if necessary. Completed sections are noted with a blue checkmark , while incomplete sections are noted with an orange exclamation mark .

9. Once all sections are completed, move the action through the workflow by hovering over the Take Action on Posting button on the top right hand corner of the page and select the workflow option you wish to take. The actions you can take are determined by your user type.

10. A pop-up 'Take Action' window will open in which you can make comments, if needed, which would be sent to the next approver. Please note, comments will be tied to the historical record of the action. Check the box to include the action on your watch list, if needed, and click **Submit**. An email will be sent to the next approver, notifying them of the pending action.

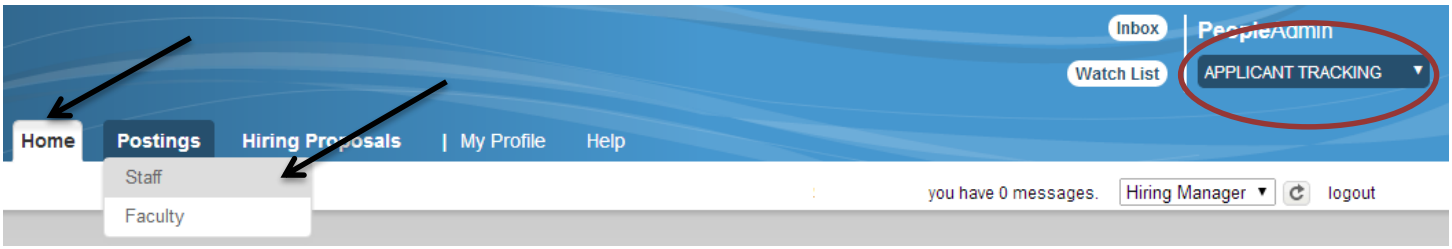
11. You will receive a green bar on the top of your page that will state the action was successfully transitioned.

Managing Applicants

Finding Applicants

In Staff postings, HRS will release applicants to the department for review and ranking after the posting close date. In Faculty postings, applicants are automatically released to the department as they apply.

1. Find the posting in one of the following places in the Applicant Tracking module:
    a. Watch List on the Home tab, or
    b. Select "Staff" or "Faculty" under the Postings tab



2. Once a posting is selected, view the "Applicants" tab for active and inactive applicants.

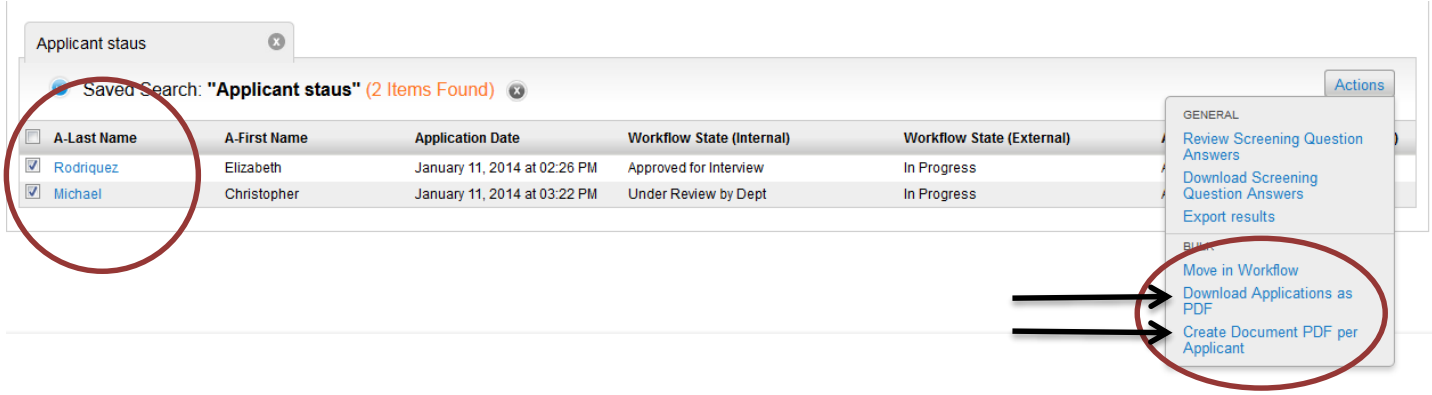
3. To view inactive applicants, change your search parameters:
    a. Click on "More Search Options" next to your search bar to select Active and/or Inactive applicants.
    b. Holding down the Ctrl button on your keyboard will allow you to select more than one option, or deselect an option.

Reviewing Application Materials

Application materials can be viewed individually or in bulk.

1. To view application materials *individually*, select an applicant name from the list. This will open the application for the selected applicant.
    a. Scroll to the bottom of the application to view other submitted documents, such as resume/cover letter.
    b. A combined document that includes all application materials submitted can also be generated at the bottom of each application.

2. To view application materials *in bulk*, select the box next to the applicants you want to review and then select the Action button on the right.



a. **Download Applications as PDF:** select this to choose which applicant document(s) you would like to include in the download.
b. **Create Document PDF per Applicant:** select this to open a pdf of all documents submitted by each applicant. This option can be slow if your applicant pool is large.

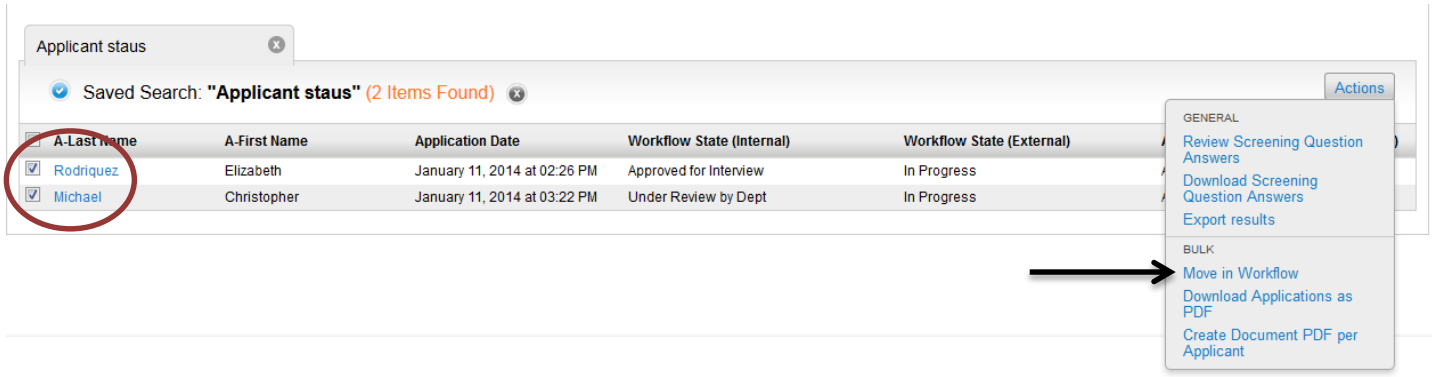
Note: PDF's will *usually* open in a separate window.

Changing Applicant Statuses

Applicant statuses can be changed individually or in bulk.

1. To change applicant status ***individually***, select an applicant name from the list. This will open the application for the selected applicant.
   a. On the right side of the application, hover over the orange Take Action on Job Application button.
   b. The workflow actions available will change each time an applicant is moved through the workflow.

2. To change applicant status ***in bulk***, select the box next to the applicants you want to move and then select the Action button on the right.



a. Select "Move in Workflow".
   i. If the "Move in Workflow" action is missing, change your search parameters to include only applicants under the hiring manager workflow state owner. The workflow state owner determines which user type has access to the action. If even one applicant is "owned" by a different workflow state owner, you will be unable to move applicants in bulk. i.e., if one applicant has already been moved to Request to Interview, this applicant is now "owned" by the Human Resources user type. You will be unable to move the rest of the applicant pool in bulk unless you change your search parameters.
      1. Click on "More Search Options" next to your search bar to select specific Workflow State(s).
      2. Holding down the Ctrl button on your keyboard will allow you to select more than one option, or deselect an option.

b. The system will ask which workflow state you would like to move the applicant(s) to.

3. In order to finalize the posting, each applicant not hired will need to have a Not Hired Reason.

Note: As a best practice, the search committee should identify the candidates they do not wish to move forward with at the same time applicants are being requested to interview.

Staff Applicant Workflow States

Under Review by Dept

- This workflow state is owned by the Hiring Manager.
- In this state, the department is reviewing the application for minimum qualifications and ranking the application to determine if an interview will be requested or not.

Not Interviewed, Not Hired

- This workflow state is owned by Human Resources.
- Once the department has determined they do not wish to interview an applicant, the status can be changed to "Not Interviewed, Not Hired".
- The department will then select the reason for why they do not wish to move forward with the applicant.

Request to Interview

- This workflow state is owned by Human Resources.
- In this state, HRS is reviewing the applicant pool for concerns.

Approved for Interview

- This workflow state is owned by the Hiring Manager.
- If HRS has no concerns, or once concerns are discussed with the department and approved, HRS will change the applicant status to Approved for Interview.
- In this state, the department is scheduling and conducting interviews and determining top candidate(s).

Interviewed, Not Selected

- This workflow state is owned by Human Resources.
- After the interview process, once the department has determined they do not wish to move forward with the applicant, the status can be changed to “Interviewed, Not Selected”.
- The department will then need to select the reason for why they do not wish to move forward with the applicant.

Alternate Finalist

- This workflow state is owned by Human Resources.
- After the interview process, once the department has determined they do not wish to move forward with the applicant, the status can be changed to “Alternate Finalist”.

Recommend for Hire

- This workflow state is owned by Human Resources.
- Once the department has determined their top candidate(s), the applicant will be changed to “Recommend for Hire”. This will signal to HRS that the department is ready to move forward with the hiring proposal, including the background check, if required.

Hired

- This workflow state is owned by Human Resources.
- Once the hiring proposal is completed, the applicant’s status will change to “Hired” and HRS will change the posting to “filled”.

Faculty Applicant Workflow States

Under Review by Department/Committee

- This workflow state is owned by the Hiring Manager.
- In this state, the search committee is reviewing the application for minimum qualifications and ranking the application to determine if the candidate will be moved to the Long List.

Not Interviewed, Not Hired

- This workflow state is owned by Human Resources.
- Once the department has determined they do not wish to interview an applicant, the status can be changed to “Not Interviewed, Not Hired”.
- The department will then select the reason for why they do not wish to move forward with the applicant.

Long List

- This workflow state is owned by the Hiring Manager.
- In this state, the search committee is reviewing the candidate to determine if a Preliminary Interview will be conducted.

Preliminary Interview

- This workflow state is owned by the Hiring Manager.
- In this state, the search committee is reviewing the candidate to determine if a Campus Interview will be conducted.

Campus Interview

- This workflow state is owned by the Hiring Manager.
- In this state, the search committee is determining top candidate(s).

Interviewed, Not Selected

- This workflow state is owned by Human Resources.
- After the interview process, once the department has determined they do not wish to move forward with the applicant, the status can be changed to “Interviewed, Not Selected”.
- The department will then need to select the reason for why they do not wish to move forward with the applicant.

Recommend for Hire

- This workflow state is owned by Human Resources.
- Once the department has determined their top candidate(s), the applicant will be changed to “Recommend for Hire”. This will signal to HRS that the department is ready to move forward with the hiring proposal, including the background check, if required.

Selected as Finalist

- This workflow state is owned by Human Resources.
- If more than one vacancy is being filled from the posting, the status can be changed to “Selected as Finalist”.

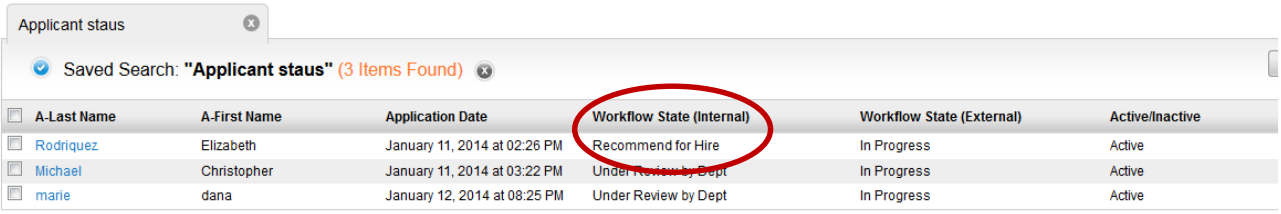
Hired

- This workflow state is owned by Human Resources.
- Once the hiring proposal is completed, the applicant's status will change to "Hired" and HRS will change the posting to "filled".

Hiring Proposals

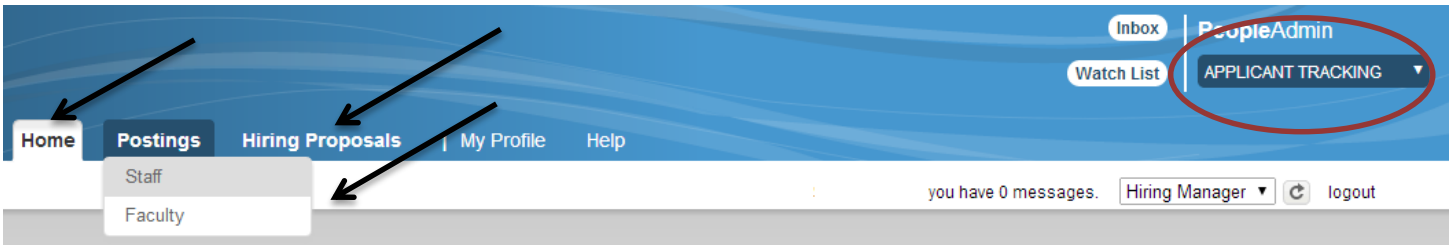
Staff

1. Select the applicant and move the individual to the workflow state "Recommend for Hire." This will alert HRS that you are ready to move forward in the process.



2. HRS selects the applicant that has been "Recommended for Hire" and begins the hiring proposal.
    a. If there is a background to check to process, HRS will begin the process and move the hiring proposal to "Background Check."
    b. Once a satisfactory background check is complete, or if the recruitment did not require a background check, HRS will move the hiring proposal to "Approved to Make Offer."

3. Find the hiring proposal in one of the following places in the Applicant Tracking module:
    a. Inbox on the Home tab,
    b. Select Staff under the Postings tab
        i. Once a posting is chosen, select the "Hiring Proposal" tab to view active and inactive hiring proposals.
    c. OR Select Staff under the Hiring Proposals tab



4. To view inactive hiring proposals, change your search parameters:
    a. Click on "More Search Options" next to your search bar to select specific Workflow State(s).
    b. Holding down the Ctrl button on your keyboard will allow you to select more than one option, or deselect an option.

5. Select Edit to begin editing the Hiring Proposal details, including requested salary and start

date. When finished, select the appropriate action.

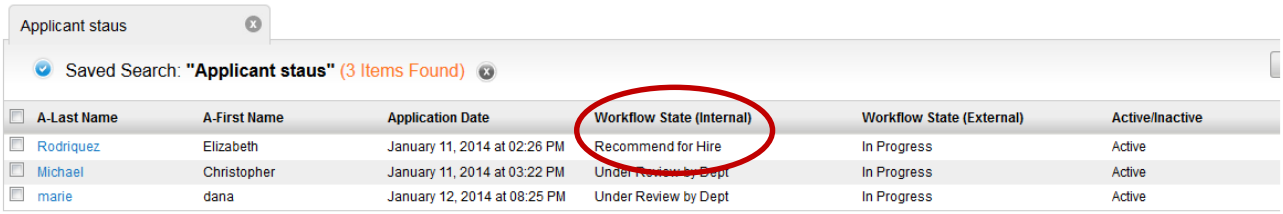
a. **Offer Accepted:** select this if the offer is at the minimum step for Classified Staff (usually step A), or at or below the approved salary amount on the position description for Administrative Professional. This option moves the action directly to HRS, skipping the Appointing Authority.

b. **Change Offer**: select this if the requested salary is above the minimum step for Classified Staff, or above the approved salary amount on the position description for Administrative Professional. The justification section will need to be filled out for this request. This option moves the action to the Appointing Authority for approval. Once the Appointing Authority has approved/adjusted the request, the request will be moved to HRS for review and approval.

   i. HRS will work with Appointing Authorities and other offices as necessary for any concerns with monthly salary amount requests. Offers are not to be extended without approval from HRS.

Faculty

1. Select the applicant and move the individual to the workflow state "Recommend for Hire." This will alert HRS that you are ready to move forward in the process.



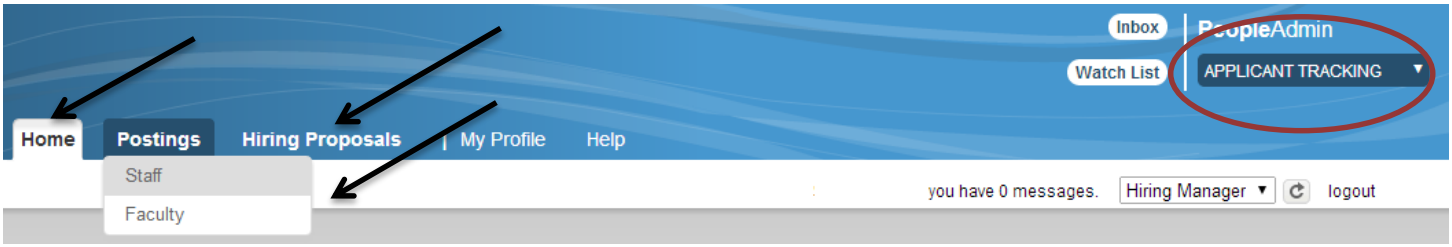
A-Last Name	A-First Name	Application Date	Workflow State (Internal)	Workflow State (External)	Active/Inactive
Rodriquez	Elizabeth	January 11, 2014 at 02:26 PM	Recommend for Hire	In Progress	Active
Michael	Christopher	January 11, 2014 at 03:22 PM	Under Review by Dept	In Progress	Active
marie	dana	January 12, 2014 at 08:25 PM	Under Review by Dept	In Progress	Active

2. HRS selects the applicant that has been "Recommended for Hire" and begins the hiring proposal.
   a. If there is a background to check to process, HRS will begin the process and move the

hiring proposal to "Background Check."

b. Once a satisfactory background check is complete, or if the recruitment did not require a background check, HRS will move the hiring proposal to the Hiring Manager.

3. Find the hiring proposal in one of the following places in the Applicant Tracking module:
   a. Inbox on the Home tab,
   b. Select Faculty under the Postings tab
      i. Once a posting is chosen, select the "Hiring Proposal" tab to view active and inactive hiring proposals.
   c. OR Select Faculty under the Hiring Proposals tab



4. To view inactive hiring proposals, change your search parameters:
   a. Click on "More Search Options" next to your search bar to select specific Workflow State(s).
   b. Holding down the Ctrl button on your keyboard will allow you to select more than one option, or deselect an option.

5. Select Edit to begin editing the Hiring Proposal details, including requested salary and start date. When finished, move the action back to Human Resources.
   a. NOTE: If Open Rank was used as the title for the recruitment, change the Working Title on the hiring proposal to define the official title the candidate is being hired at.
   b. If there are concerns or questions on the salary amount, HRS will move the applicant to the Appointing Authority for additional review.
   c. Once details are finalized (BGC results, questions, etc.) HRS will approve the hiring proposal.