PEOPLESOFT 9.2

User Guide: Talent Management Acquisition (TAM) Navigation

Overview

This guide is intended to:

- Define terminology related to the new user interface
- Explore the new features.
- Provide steps on how to navigate and customize CUNYfirst.

Note: CUNYfirst System Requirements

The PeopleSoft 9.2 upgrade introduces new cookies for your web browser that can affect how CUNYfirst is displayed in terms of fonts, colors or page layout.

Clearing your web browser's **cuny.edu** site cookies and restarting the web browser before logging into CUNYfirst fixes these display issues. See the following web pages for instructions on clearing the cuny.edu cookies from your web browser:

- Clear cookies and site data in Firefox – follow the instructions to "Clear cookies for any website"
- Delete cookies in Microsoft Edge – follow the instructions to "Delete cookies from a specific site"
- Clear, enable and manage cookies in Chrome – follow the instructions to "Delete cookies from a site"
- Manage cookies and website data in Safari on Mac – follow the instructions to "Remove stored cookies and data."

Table of Contents

PEOPLESOFT 9.2 & CUNYfirst: TAM

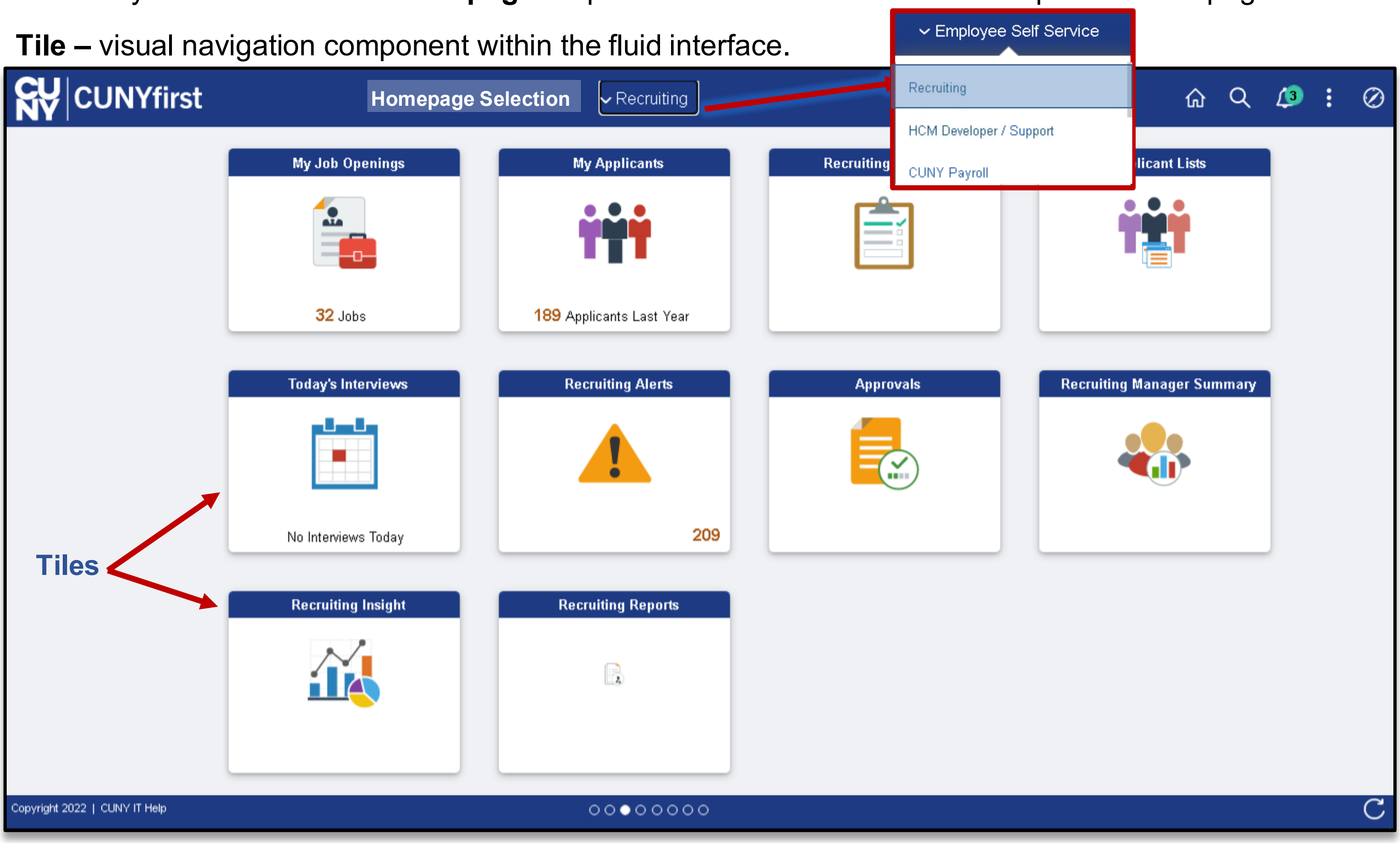
Talent Management Acquisition (TAM)

With new performance improvements comes new terminology. The definitions below are provided to assist in understanding the PeopleSoft 9.2 upgrade to CUNYfirst.

Fluid – Fluid is a new interface where tiles are added to homepages for navigational ease instead of the Classic cascading pagelets/menus. Fluid is a modern, responsive user interface that provides the flexibility to work seamlessly from desktops, tablets and phones.

Homepage - The landing page for PeopleSoft navigation. A user can have several homepages but onlyone default (e.g., CUNYfirst Home). Homepages can be customized to accommodate your personal interaction withthe system. Click on the **Homepage** drop-down arrow to access other component homepages.

Tile – visual navigation component within the fluid interface.



Recruiting Homepage

Navigation: **Recruiting Homepage**

Talent Acquisition Management (TAM) staff perform work activities through the **Recruiter** homepage. The homepage contains the **My Job Openings**, **Recruiting Activities**, and **Approvals** tiles which provide access to commonly used recruiting activities.

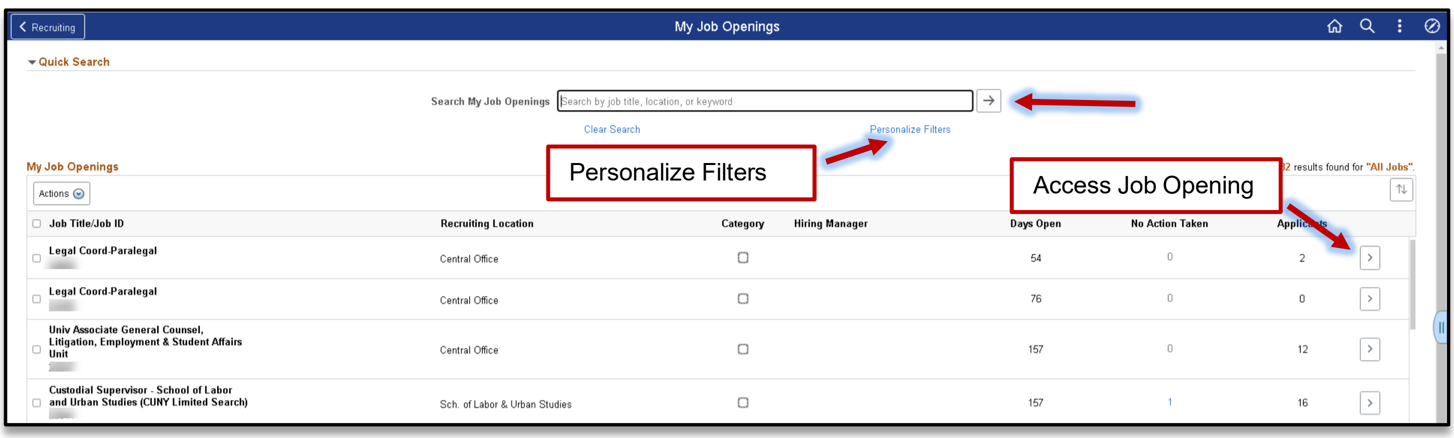
My Job Openings

Navigation: **Recruiting Homepage** > **My Job Opening Tile**

Navigation: **Employee Self-Service Homepage > Recruiting Related Tasks Tile (Search Committee)**

Navigation: **Manager Self-Service Homepage > Recruiting Related Tasks Tile (Search Committee)**

View the count of open jobs associated with the hiring manager/recruiter and access information about the job openings using the **My Job Openings** tile. Additionally, search committee staff will have access to **My Job Openings** to review applicant information and documentation via the **Recruiting Related Tasks** tile located on the **Employee** or **Manager Self-Service** homepage.



Use the **Search My Job Openings** field to search for specific job openings. Use the **Personalize Filters** link to change the results list.

Display: Select a value to filter page data according to the job opening to be displayed.

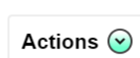
Jobs Associated with Me are job openings that you created or where you are part of the hiring team. Note: Select the **Jobs Associated with Me** option when reviewing job as a member of a hiring committee.

Jobs Assigned to Me (the default value) is a subset of the jobs associated to you; it includes only job openings where you are either the primary recruiter, the primary hiring manager or interview panel. The other filtering options include: **All Jobs**, **Jobs to be Approved by Me** and **Jobs Created by Me**.

Status: Select a value to filter page data based on the job openings status. The default value is **Open**.

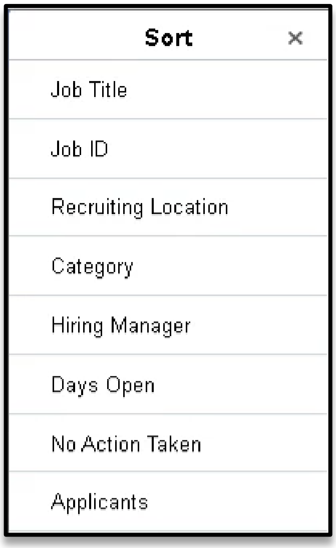
Created Within: Select a value to filter page data based on how recently the job opening was created. Options include:

- Today
- Yesterday,
- Last 3 Days,
- Last Week,
- Last 2 Weeks (the default value),
- Last Month,
- Last Year
- View All

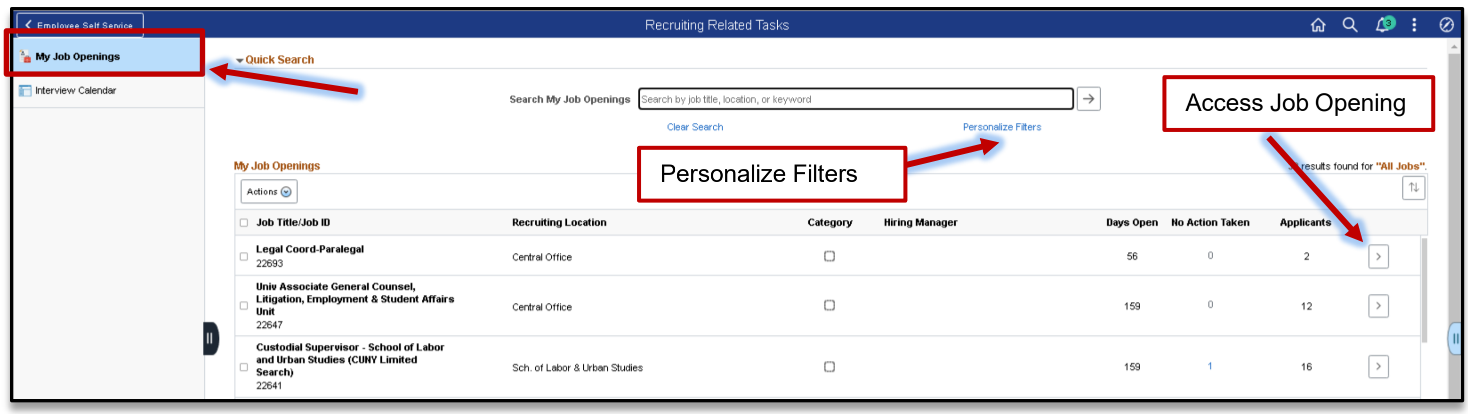
Select one or more job openings and click on the 

menu link to perform actions on the job openings.

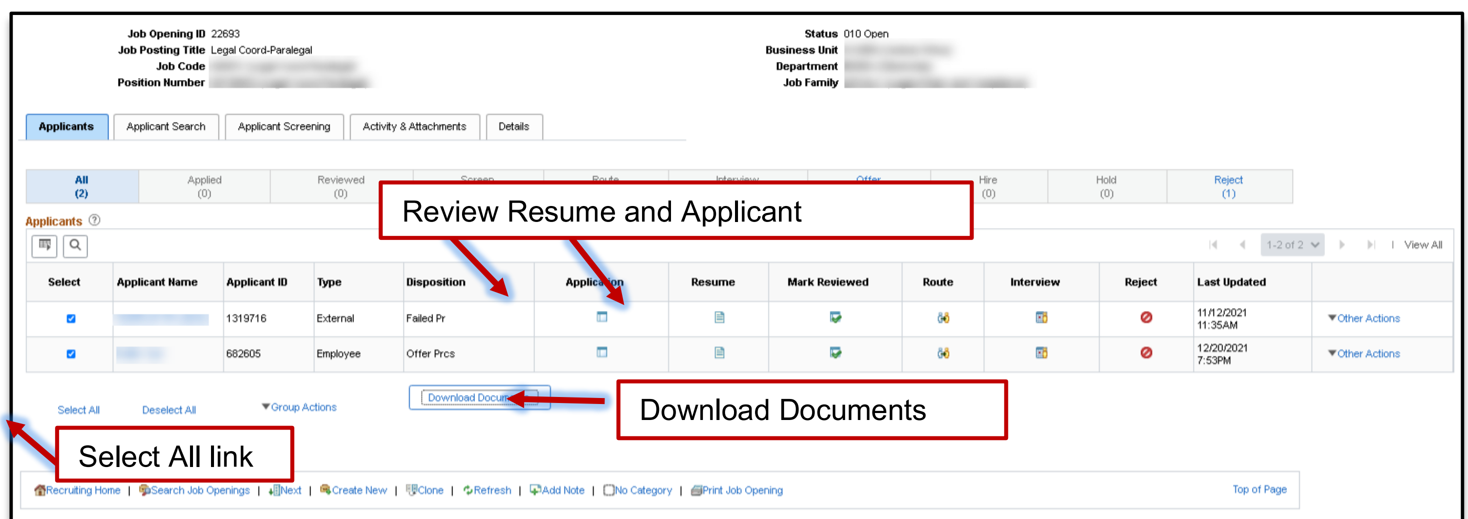
Sort the Job Opening list using the  icon. The **Sort** menu displays to select a different sort criteria.



My Job Openings displays the jobs associated to you. **Note: If no jobs display, use the personalize filter link to modify the criteria of the information displayed.**



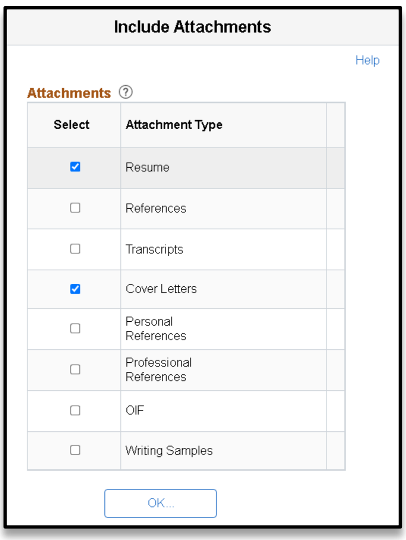
Select the arrow to open the **Manage Job Openings** page.



Download Documents

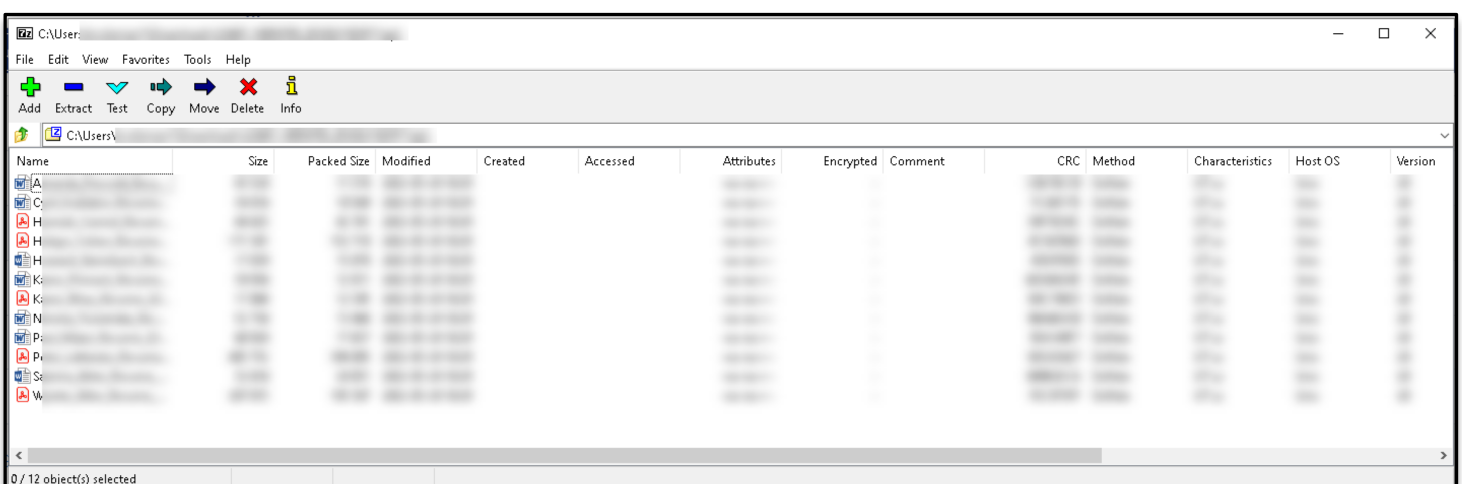
Documents may be downloaded for one or multiple candidates on the **Manage Job Opening** page. To begin, select the candidate(s), using the select check box, for documentation download. Note: Use the **Select All** link to enable check boxes. Click the **Download Documents** button.

The **Include Attachments** window displays. Select the documents to be included in the download. Click the **OK** button to begin the download process.



Note: Documents containing special characters will be omitted from the download process. An error message displays and provides the applicant information so the candidate documentation may be reviewed separately.

Click the file to review candidate information.



Note: Please manage/disable pop-up blockers to ensure information is downloaded.

Recruiting Activities

Navigation: **Recruiting Homepage** > **Recruiting Activities Tile**

Access the **Recruiting Activities** tile to view a navigation collection of commonly used recruiting activities.

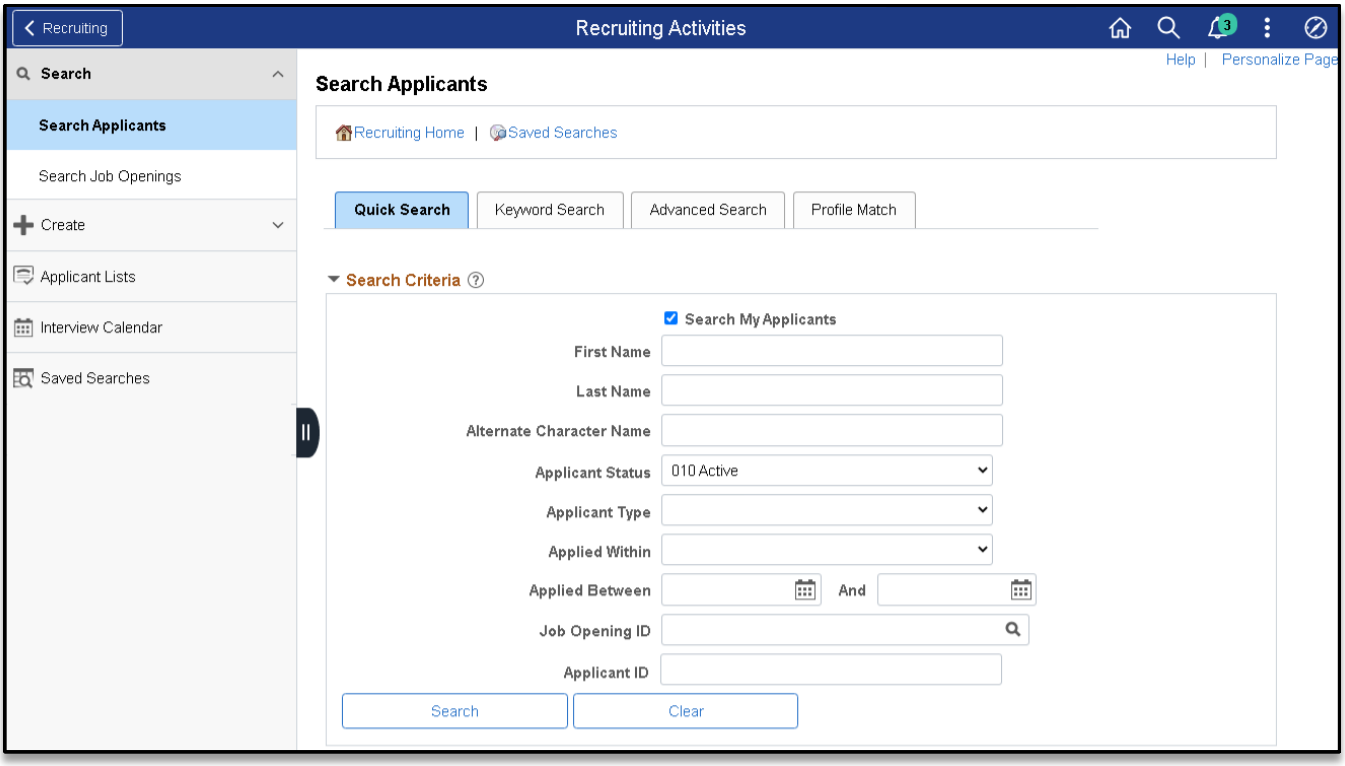
The navigation collection of commonly used recruiting pages may include the following component pages: **My Job Openings** (security driven), **Search Job Openings**, **Create Job Opening**, Applicant Lists, **Interview Calendar** and **Saved Searches**.

Note: Use the Employee Self-Service homepage to access Recruiting Related Task (e.g., My Job Openings and Interview Calendar).

Navigation: Employee Self-Service Homepage > Recruiting Related Task Tile > My Job Openings

Navigation: Manager Self-Service Homepage > Recruiting Related Task Tile > My Job Openings

Enter the search criteria and click the **Search** button to locate an applicant.



Search Job Applicants

Navigation: **Recruiting Homepage** > **Recruiting Activities > Search Job Applicants**

Use the **Search Applications** page to search for applicants and applications that meets the criteria you specify. Regardless of the criteria specified, the results will only contain applicants who have applied to job openings within your Business Unit. **Note:** Applicant Status defaults to Active in the search criteria.

Enter the search criteria and click the **Search** button to locate applicant search results.

Search Job Openings

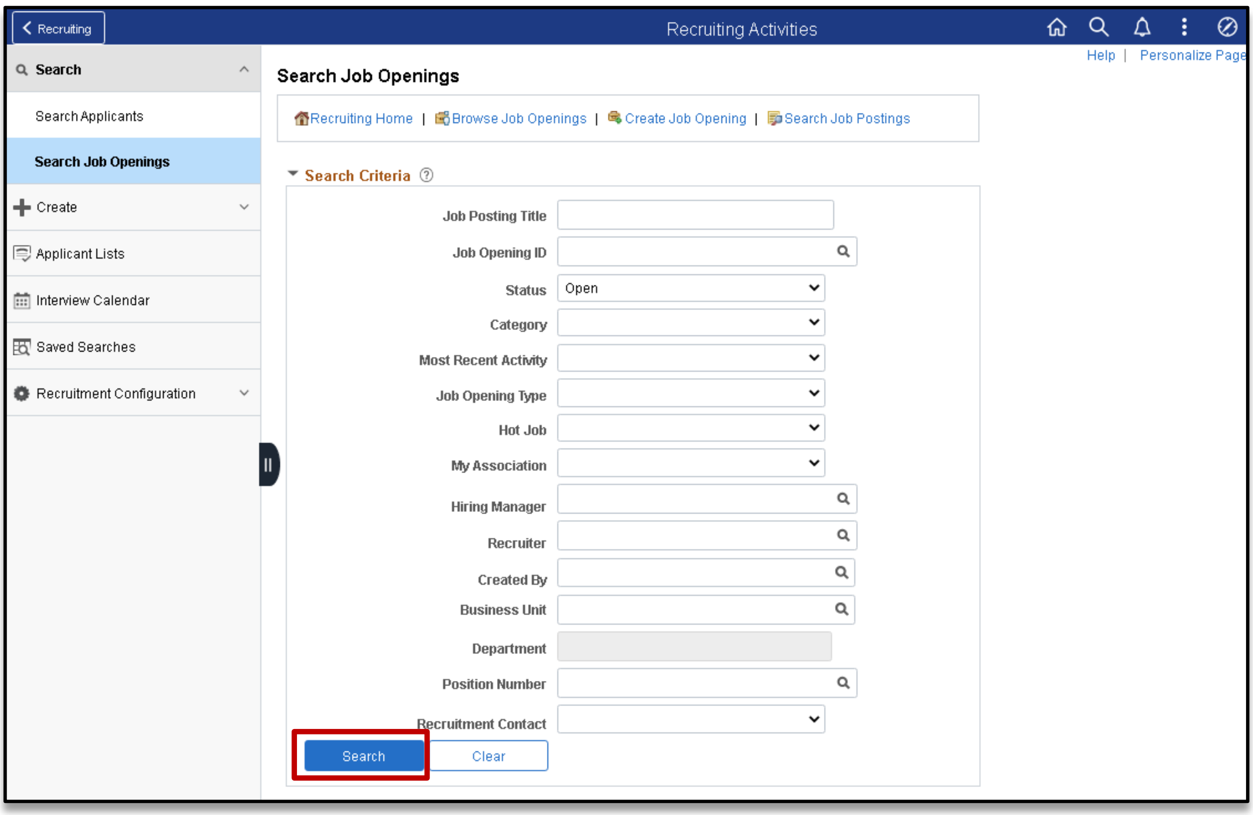
Navigation: **Recruiting Homepage** > **Recruiting Activities > Search Job Openings**

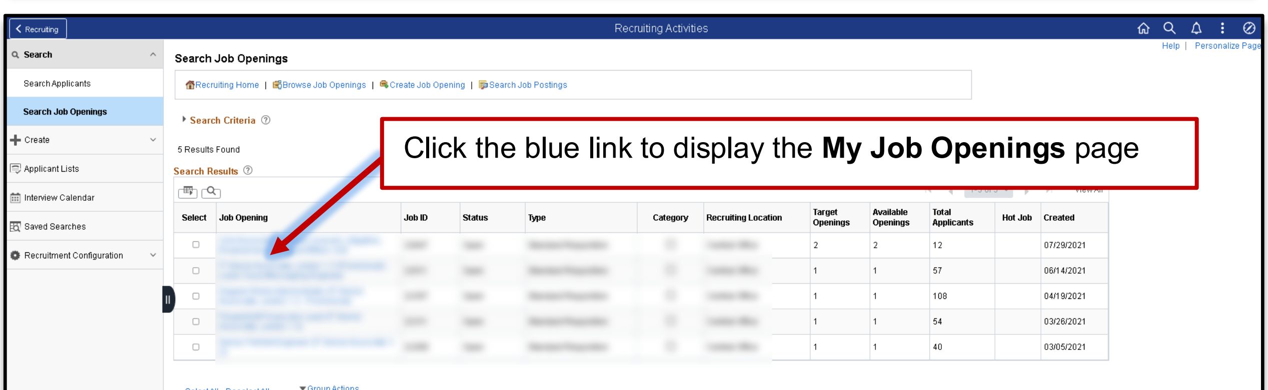
The **Search Job Openings** options provides search options for locating job information. A job is assigned to a user under these circumstances:

- As the primary hiring manager or primary recruiter.
- a user that created the job.
- Hiring team (recruiter, hiring manager, interviewer, or interested party).

The Hiring Manager, Recruiter, and Created By fields provide for searching for jobs based on the members of their hiring teams.

Enter the search criteria and click the **Search** button to locate job search results.





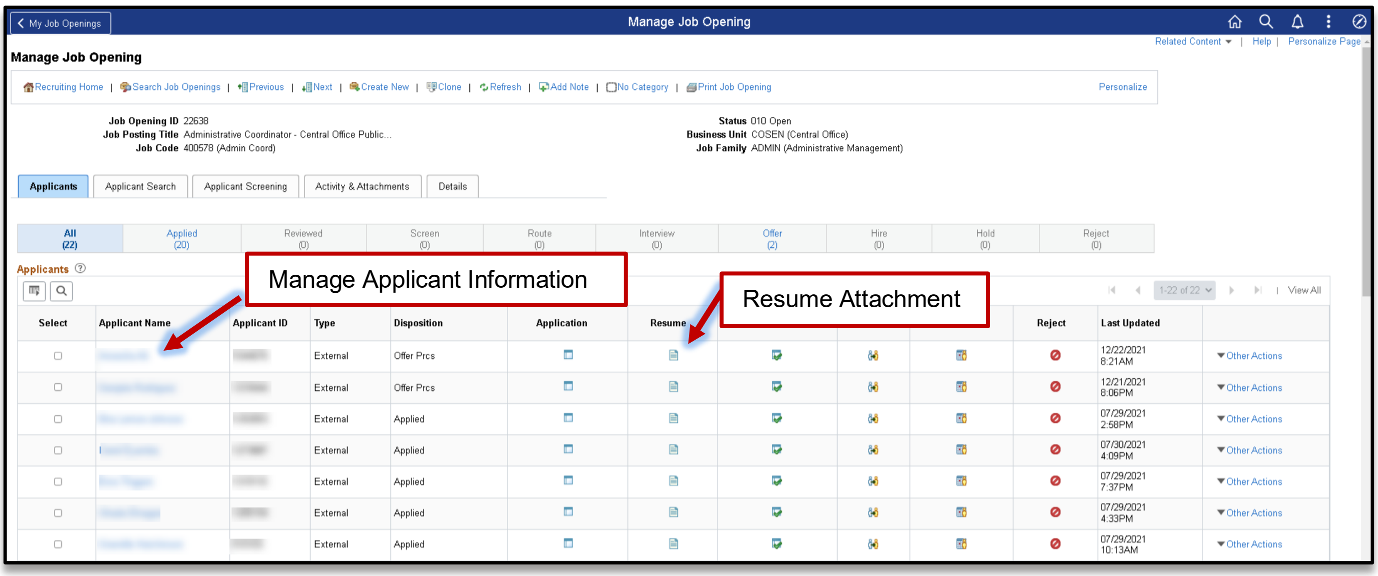
My Job Openings

Navigation: **Recruiting Homepage** > **My Job Openings** or **Employee Self-Service Homepage > Recruiter Related Activities > My Job Openings**

From the list, select a job opening with applicants. In the Applicants column, the number of Applicants who have applied displays. The **Manage Job Opening** page displays.

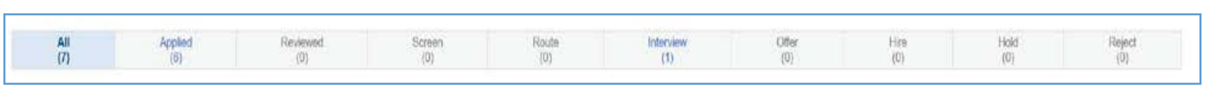
Applicants

Applicants - review applicants for a job opening and perform various applicant-related activities. This grid displays applicants who are linked to the current job opening.



Dispositions

Across the top of the Applicants tab, a horizontal bar provides a graphical representation of the status of the recruiting process, with labels indicating both the status name and the number of applicants currently in dispositions that belong to that phase. **Note:** for Hiring Managers/committee members, no applicants display with the Applied status even when a number displays. Applicants with this disposition are only visible to Recruiter.



Applicant Icons

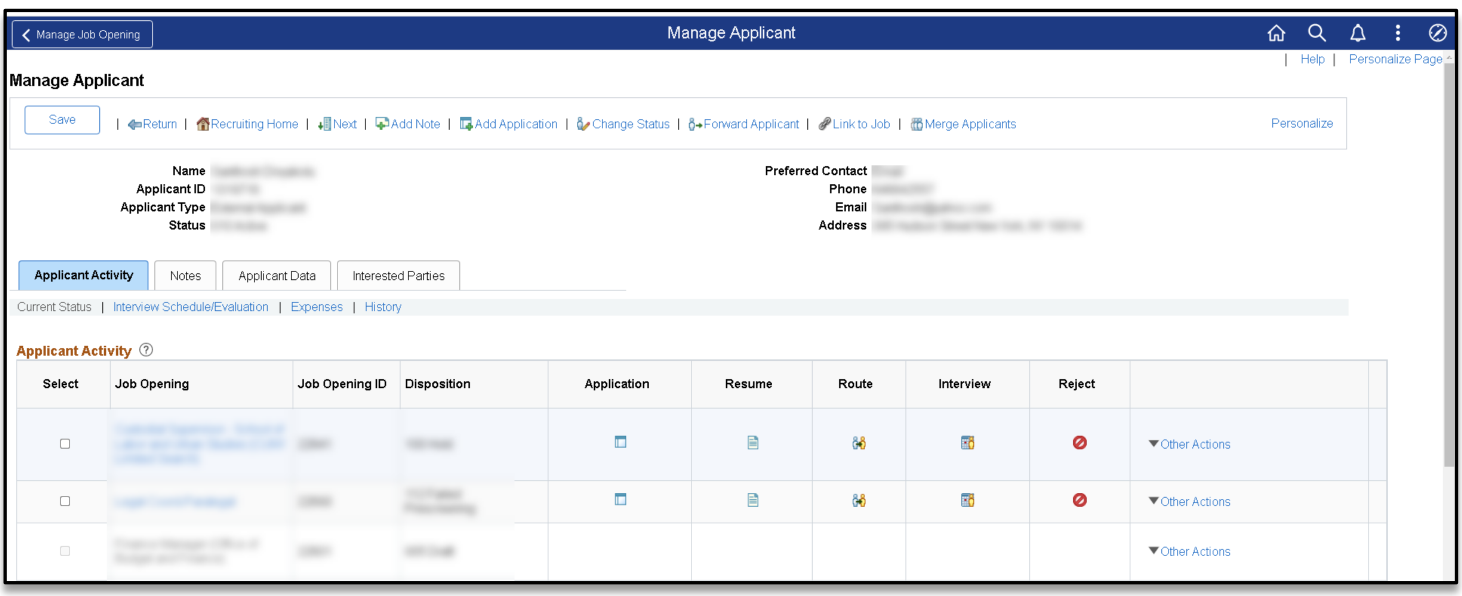
- **Application –** review the submitted application
- **Resume –** review the attached resume
- **Route –** send the applicant's credentials to another party for review
- **Schedule Interview** – schedule the interview
- **Reject –** updates the applicant's status to rejected

The page is organized into five tabs or pages: Applicants, Applicant Search & Screening, Activity & Attachments, and Details.

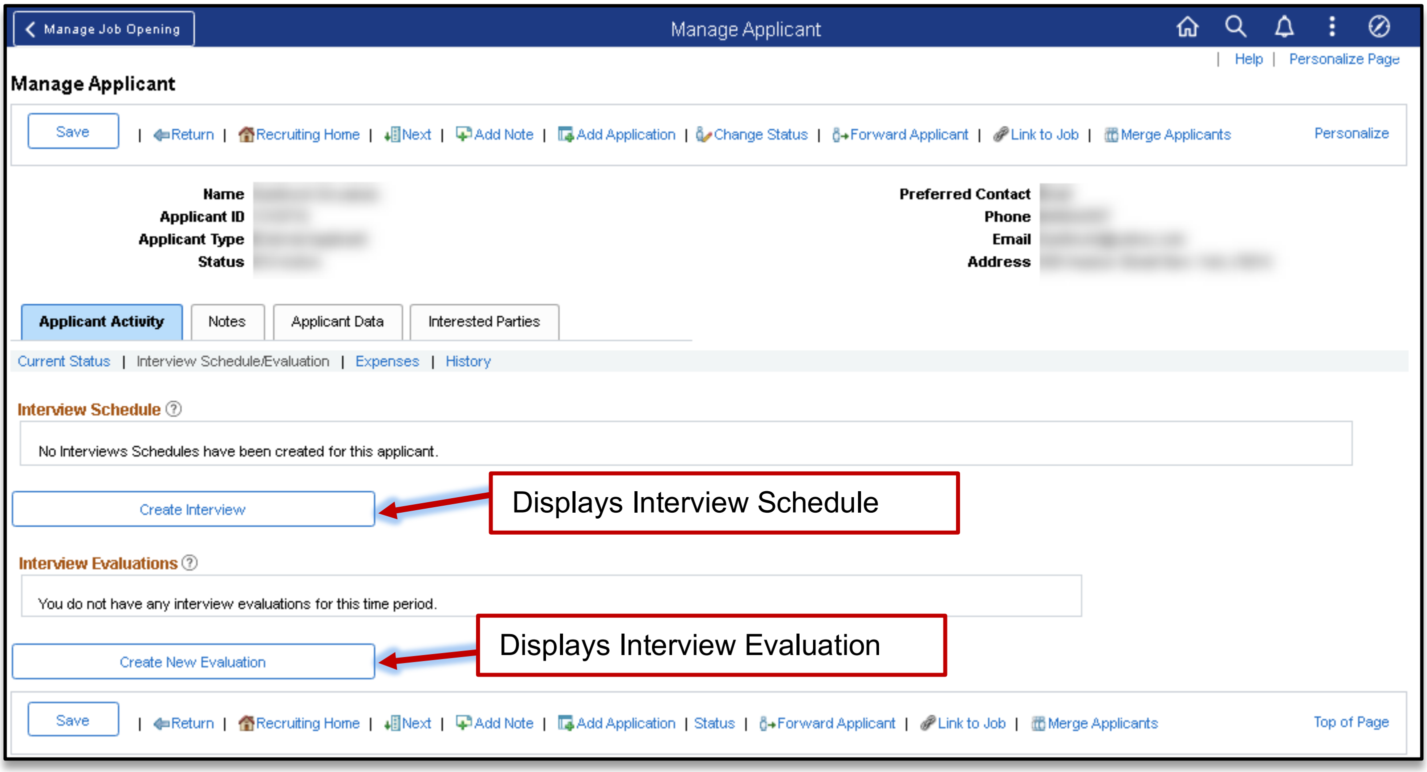
- **Applicants** – displays applicant information
- **Applicant Search** – provides for searching the job opening
- **Applicant Screening** – provides access to assigned screening levels allowing staff to process each level in its logical sequence.
- **Activity & Attachment** – provides access to activities and attachment for the job opening.
- **Details** – provide access to other job information links, specifically, Job Details, Educ & Exp, Accomplishments, Screening, Job Postings, Hiring Team & Approvals

View Applicant

Use the Applicants grid to access the applicant information. Click on the **Applicant Name** link to access the **Manage Applicant** page.



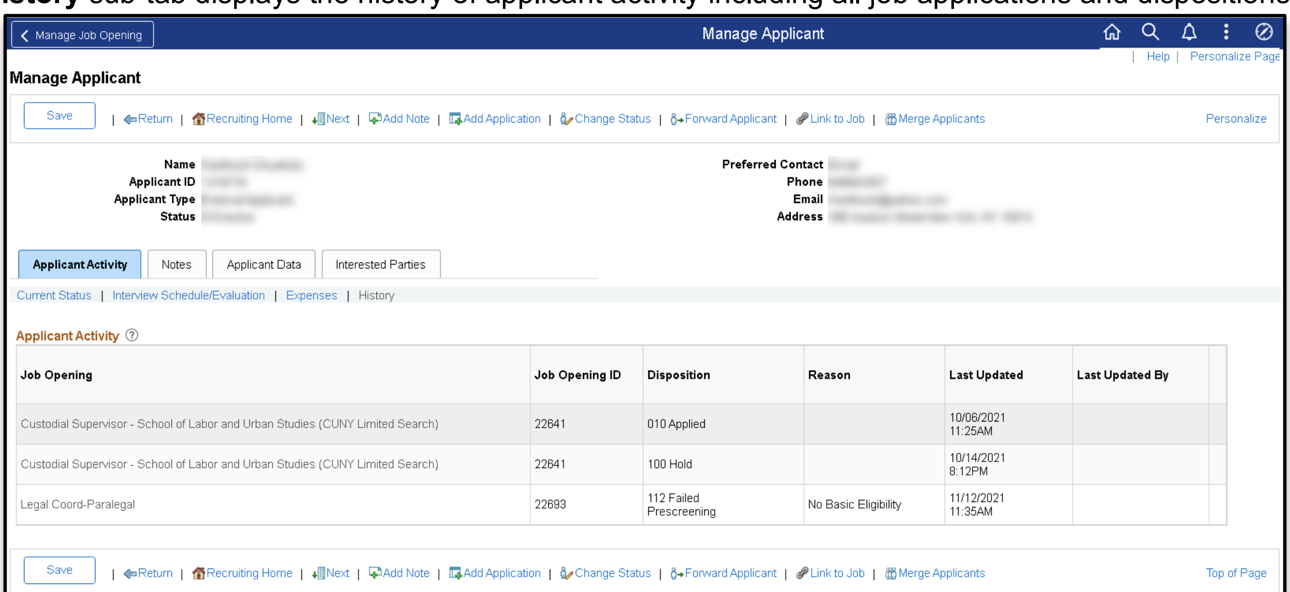
Interview Schedule/Evaluation



Interview Schedule
Use the **Create Interview** button to begin the scheduling process.

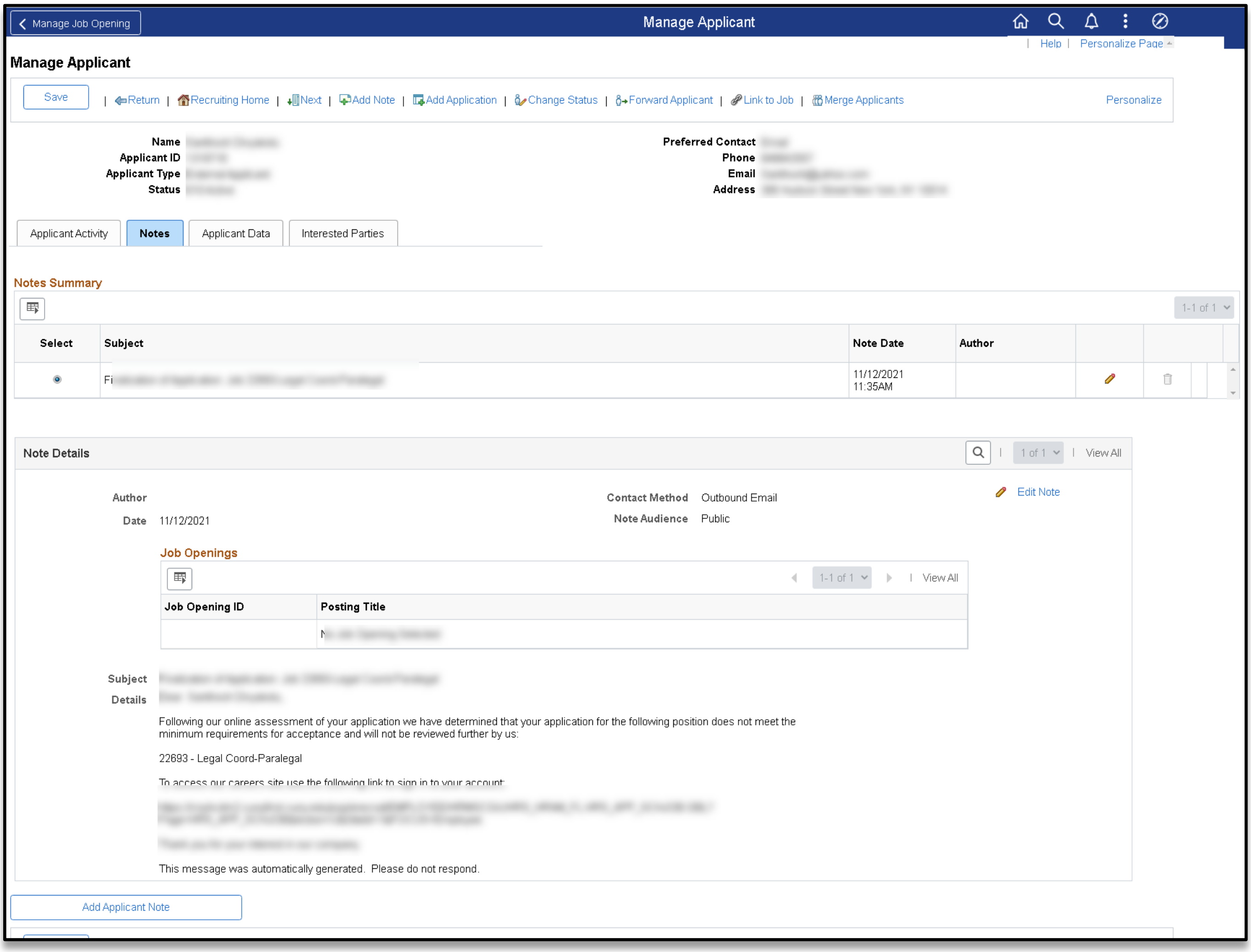
Evaluation
Use the **Create New Evaluation** button to enter evaluation results.

History
The **History** sub-tab displays the history of applicant activity including all job applications and dispositions.



Notes

Use the **Notes** tab to review notes for applicants, as well as view attachments to notes.



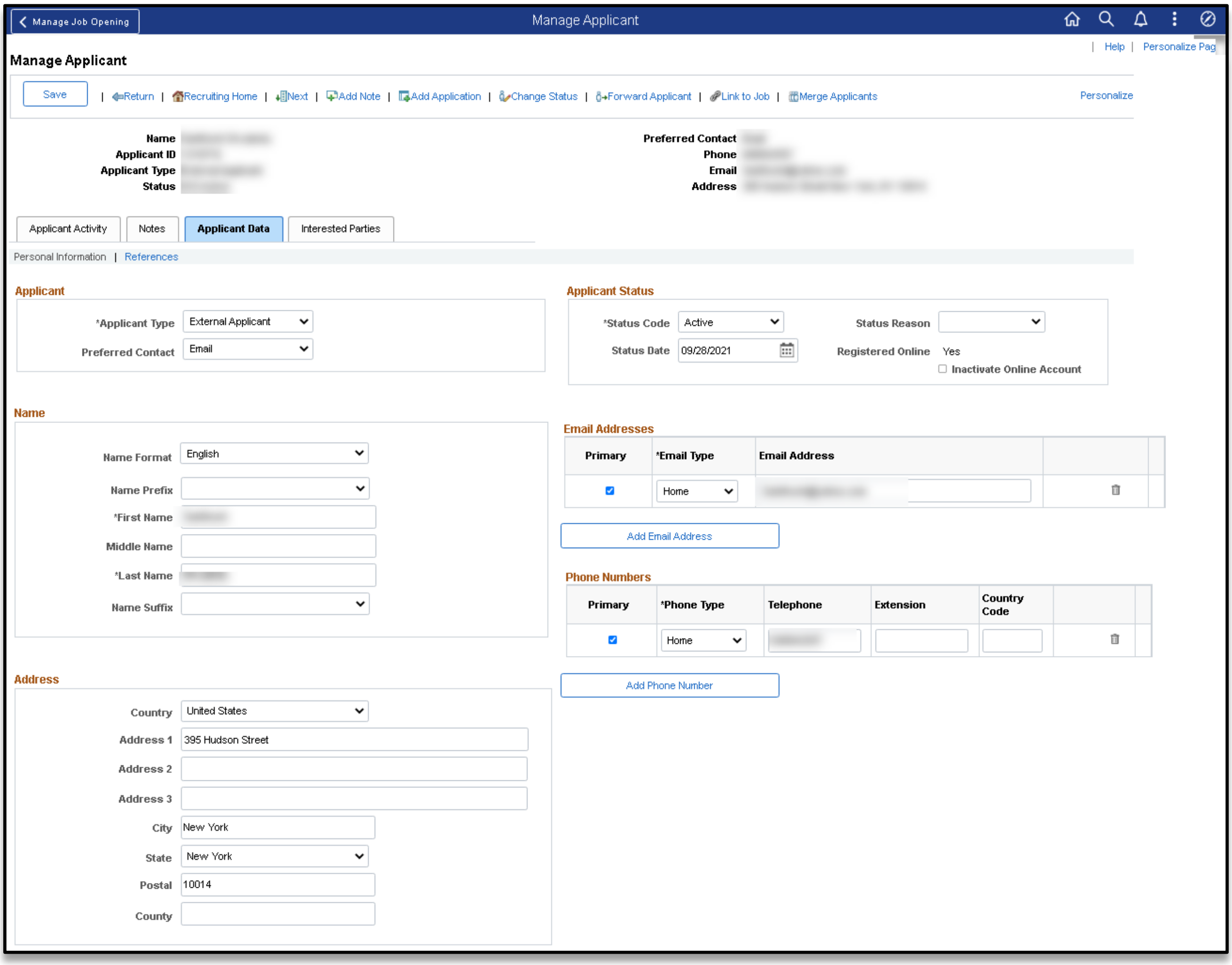
Recruiter users can manually create applicant notes and optionally add attachments to the notes. Additionally, the system automatically creates applicant notes during recruiting process such as:

- Forwarding an applicant.
- Sending correspondence.
- Generating a letter.

Applicant Data

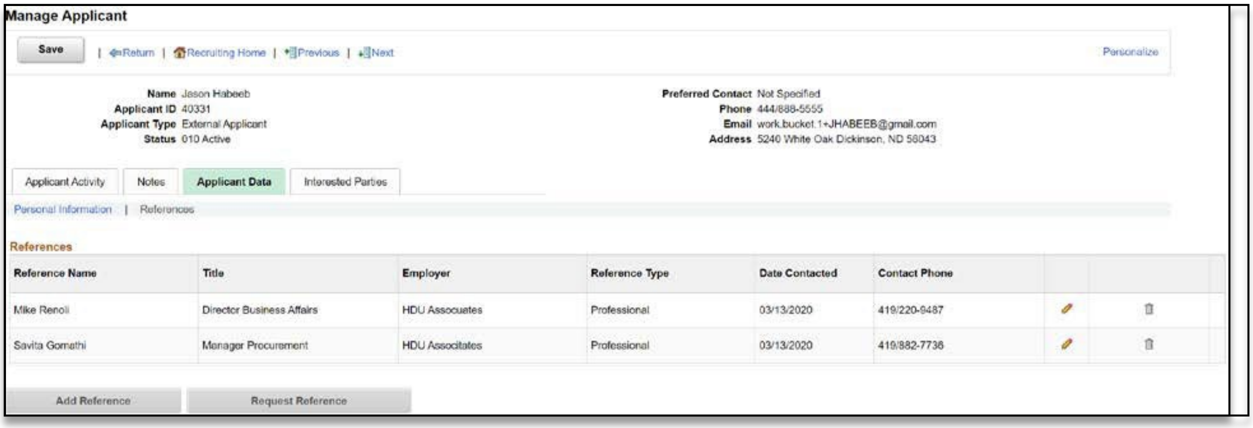
Use the **Applicant Data** tab to view an applicant's personal information and references. This tab is organized into two pages: Personal Information, and References.

Personal Information



The biographical information is provided by the applicant from the Candidate Gateway. A recruiter can edit the information, as needed. For a Hiring Manager, the page displays in view only mode.

References



This information is provided by the Applicant during the application process. A recruiter can Add References or edit the information, if needed.

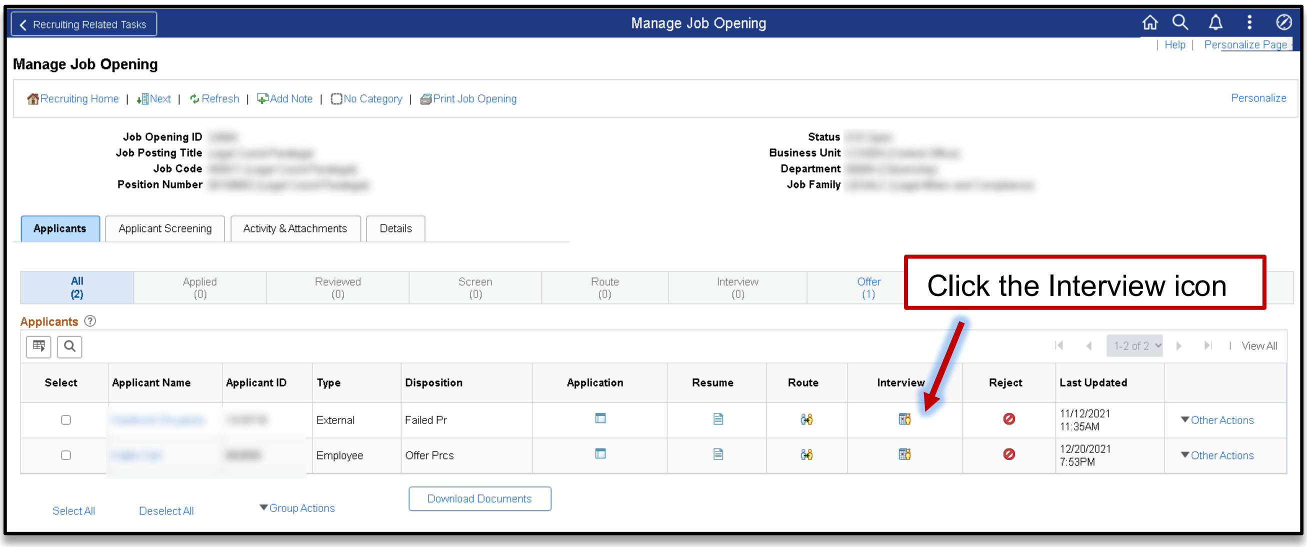
Schedule Interview

Navigation: **My Job Openings > Select Applicant > Group Actions > Recruiting Actions > Manage Interviews**

Navigation: **My Job Openings >Interview Icon**

Navigation: **My Job Openings > Applicant Name Link > Interview Schedule/Evaluation > Create Interview**

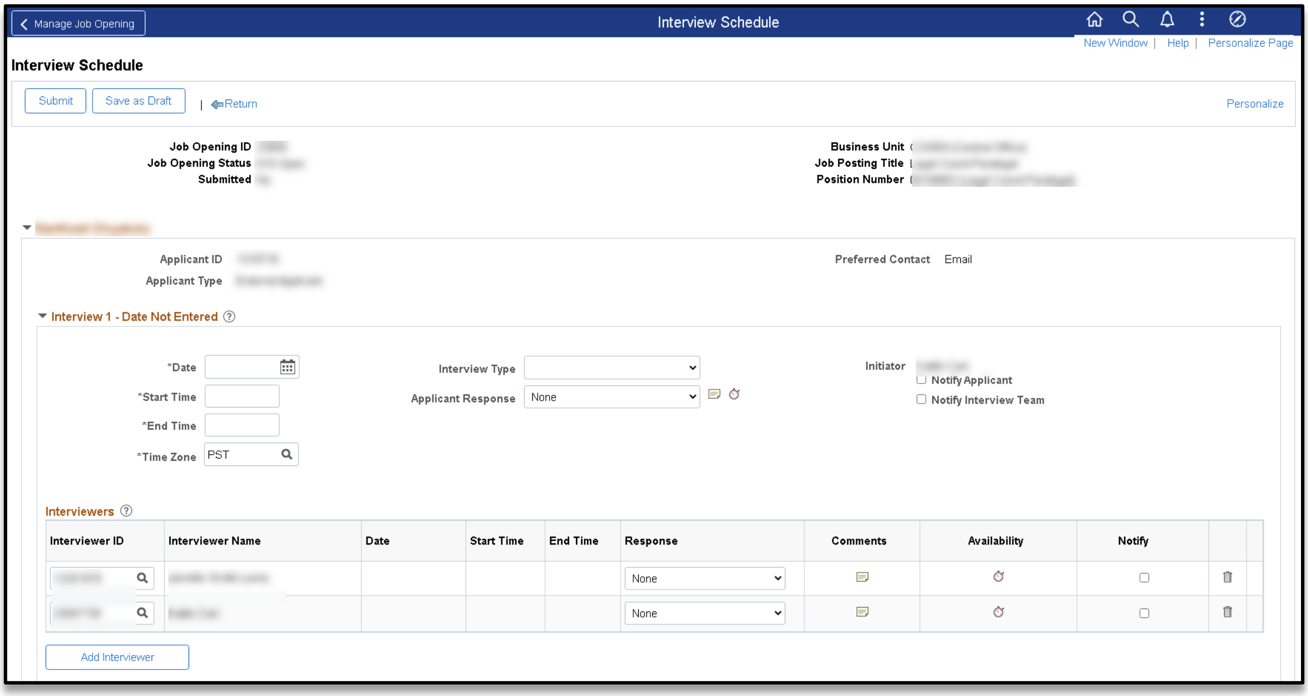
Begin the Schedule Interview process from the Manage Job Opening page by selecting an applicant and using the Group Actions – **Manage Interview** option.



The **Manage Job Openings** grid includes the Interview action icon. When selected, the **Schedule Interview** page displays. Once an interview has been scheduled this page displays the scheduled interview details and allows for managing Interview Evaluations.

Interview Schedule

The Interview Schedule page can be used to set up an interview.



Date: Enter the date on which the interview is to take place.

Start Time, End Time, and Time Zone: Enter the start and end times for the applicant's interview.

Interview Type: Select one of the interview types (e.g., In person, Phone, Video Conference).

Applicant Response: For a scheduled interview, this value will be None. Can manually set the appointment status to Accepted, Declined, None (no response), or Tentative(tentatively accepted).

Applicant Comments: Click to access the Interview Schedule Comments page where you can enter applicant-specific comments. These comments appear on the interview details page that the applicant sees in Candidate Gateway.

Applicant Availability: Click to access the Interview Schedule page, which displays all interview dates and times for the applicant for any scheduled interviews.

Initiator: Displays the name of the user who originally created the interview.

Notify Applicant: By default, this check box is initially deselected. Select this check box to have an email notification sent to the applicant when the interview is submitted.

Notify Interview Team: Select this check box to make the system select all of the Notify check boxes for individual interviewers. **Note**: If you select the **Notify Interview Team** check box and then deselect the **Notify** check box for an individual interviewer, the **Notify Interview Team** check box remains selected, but the system does not send a notification the deselected interviewer.

Interviewers: Use the Interviewers grid to identify the interviewers who will participate in the interview. This grid is populated with the interviewers from the job opening hiring team.

Interviewer ID and *Interviewer Name:* Displays interviewers employee IDs and name.

Date, Start Time, End Time, and Time Zone: Displays the date and time for the interview in the interviewer's own time zone.

Response: Set the appointment status to Accepted, Declined, None (no response), or Tentative (tentatively accepted). For a scheduled interview, this value will be None.

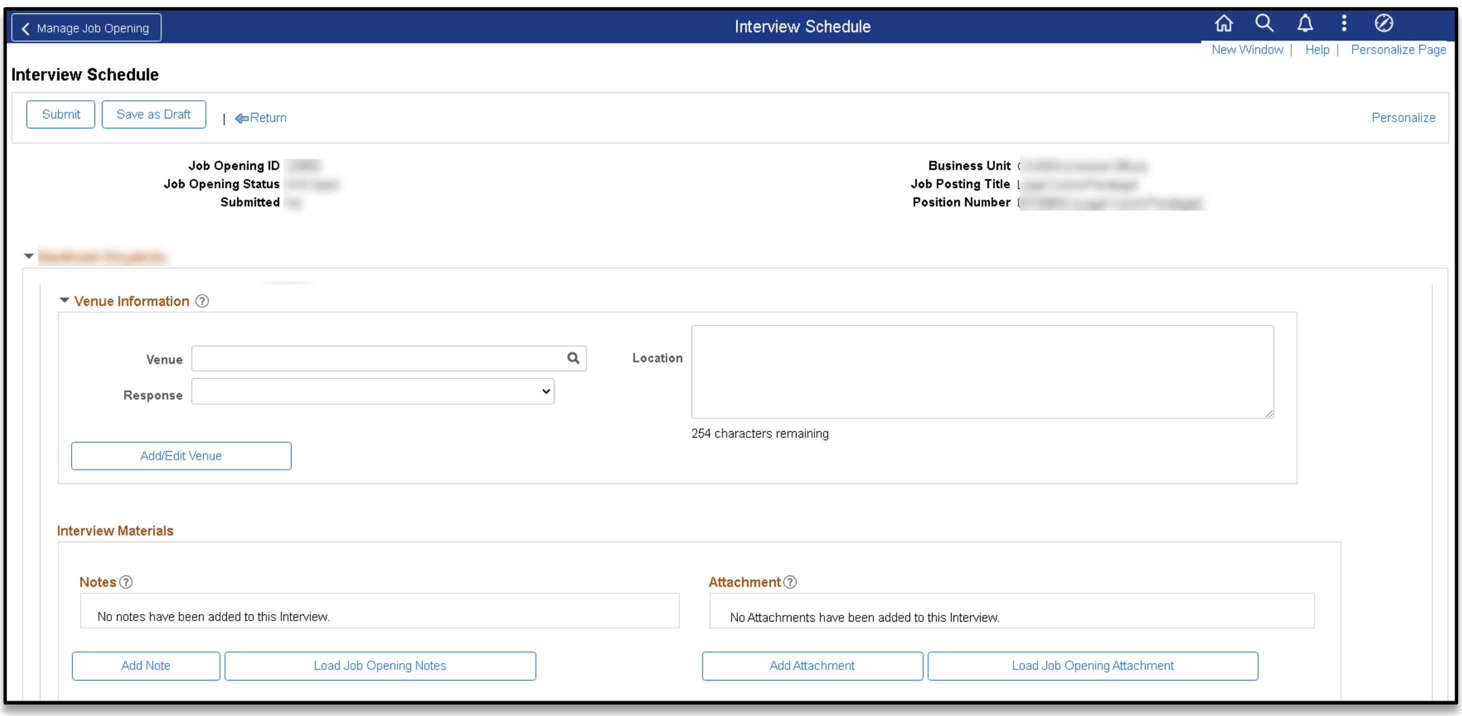
Comments (interviewer comments): Click to access the Interview Schedule Comments page and enter interviewer-specific comments. If interviewer-specific comments exist, the interviewer sees a comments icon alongside the interview on the Interview Calendar page.

Availability (interviewer availability): Click the icon to access the Interview Schedule page, which displays all interview dates and times for the interviewer for any scheduled interviews.

Notify: Select this check box to have an email notification sent to an individual interviewer when the interview is submitted, resubmitted, or cancelled.

Add Interviewer: Click this link to add another interviewer to the Interview Schedule grid.

Interview Schedule Continued



Venue: In the Venue field, select a physical location for the interview. For a scheduled interview, this value will be venue that was set up on the interview session. **Venue Email Address-** When you select a venue, its email address appears.

Response: Select the appropriate value.

Location: If there is location information in the venue definition, the system enters that location information here, replacing any existing location text. You can modify the location text, and any changes that you make are saved to the venue definition. You can also enter location text without selecting a venue.

Add/Edit Venue: Click to access the Interview Facilities Page, where you can modify venue details for the currently selected venue; or add a new venue.

Notes: Use the Notes grid to add notes related to the interview. You can also add attachments to individual notes. These notes are specific to the interview; they are not associated directly to either the job opening or the applicant. The notes are visible to an interviewer, or user who has access to the Job Opening.

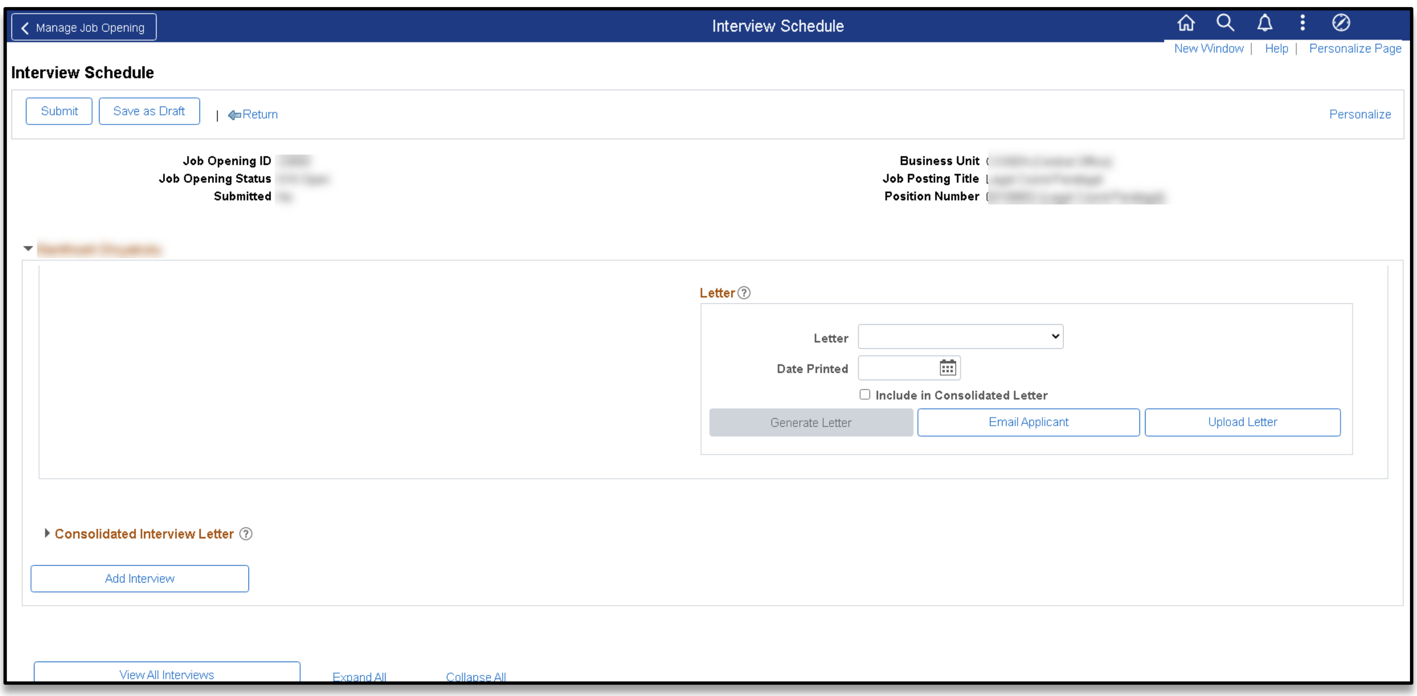
Attachments: Use the Attachments grid to attach external documents, such as interview scripts, to the interview schedule. Click the Add Attachment link to add file attachments to the grid; the system prompts you to identify the file to be uploaded.

Load Job Opening Attachment and Load Job Opening Notes: Click these links to copy selected attachments and notes from the job opening to the interview. Job opening attachments and notes appear on the Manage Job Opening Page: Activity & Attachments Tab.

Letter / Consolidated Interview Letter: Individual scheduled interview letters, and consolidated interview letters (containing all scheduled interviews) can be generated by the system.

Add Interview: Click this button, which appears once per applicant (at the bottom of the Interview Schedule page) to add an additional interview section for the applicant.

View All Interviews: Click to access the Interview List Page, which displays a read-only summary of the information on the Interview Schedule page.

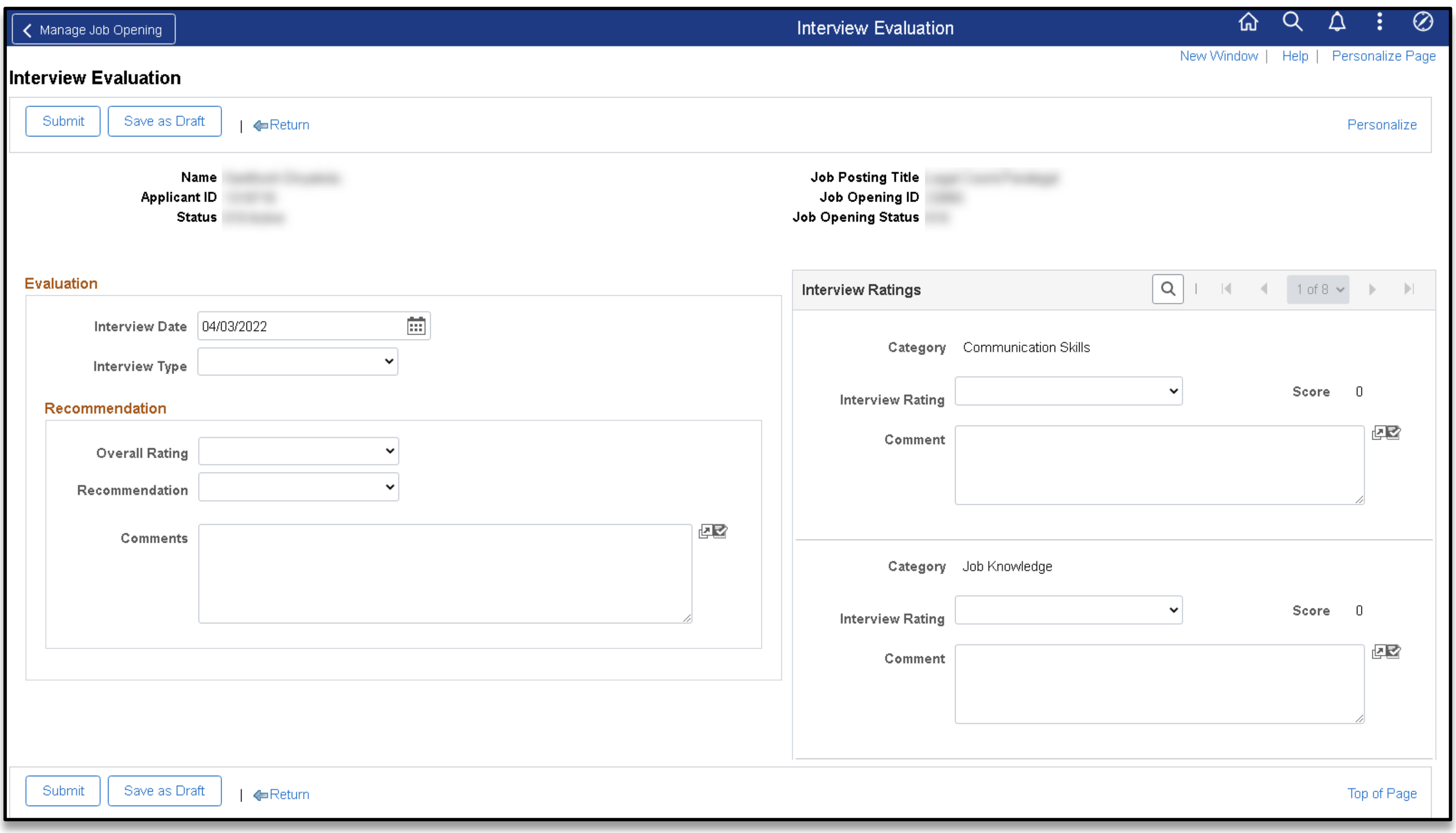


Interview Evaluations

Navigation: **My Job Openings > Select Applicant > Other Actions > Recruiting Actions > Create Interview Evaluation**

Navigation: **My Job Openings > Applicant Name Link > Interview Schedule/Evaluation > Create Interview Evaluation**

After interviewing an applicant, interviewers (Search Committee members) evaluate the applicant. The Search Committee Chair will use all the evaluations to create a summary interview evaluation of the applicant in CUNYfirst. The evaluation includes fields for giving the applicant an overall rating and for recommending how to proceed in the recruiting process.



Interview Type: Enter the interview type as entered on the Interview Schedule page.

Recommendation: Enter the evaluator's recommendation. Note: When **005 Interview** is selected, an additional Reason is required.

Comments: Enter comments.

Interview Ratings: Displays the overall rating given by the evaluator. Select a rating (Outstanding = 5, Very Good = 4, Acceptable = 3, Unsatisfactory = 1, N/A = 0). Note: Ratings must be completed for all categories for submission.

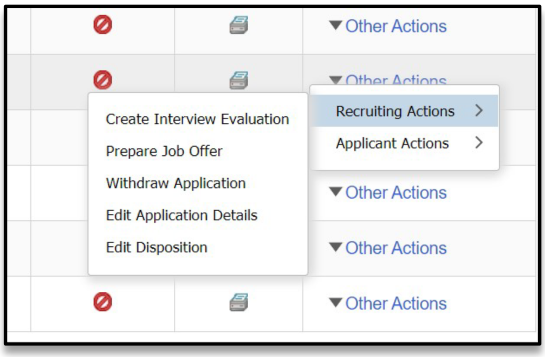
Click the **Submit** button to save the evaluation

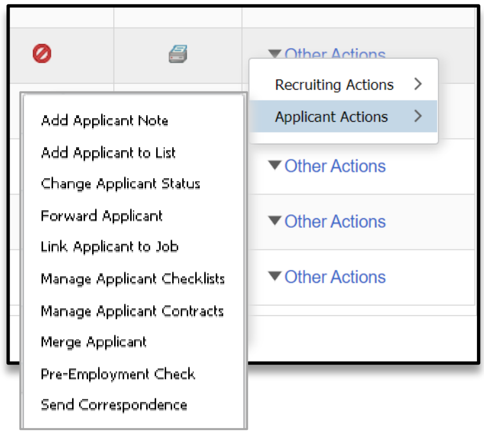
Other Actions: Applicant Actions and Recruiting Actions

The actions performed in CUNYfirst are divided into two categories:

- **Applicant Actions** affect the overall applicant record instead than a specific application.
  - Examples include Forward Applicant, Send Correspondence, and Link Applicant to Job.
- **Recruiting Actions** relate to an application for a specific job opening.
  - Examples include Edit Disposition, Reject Applicant, and Prepare Job Offer.

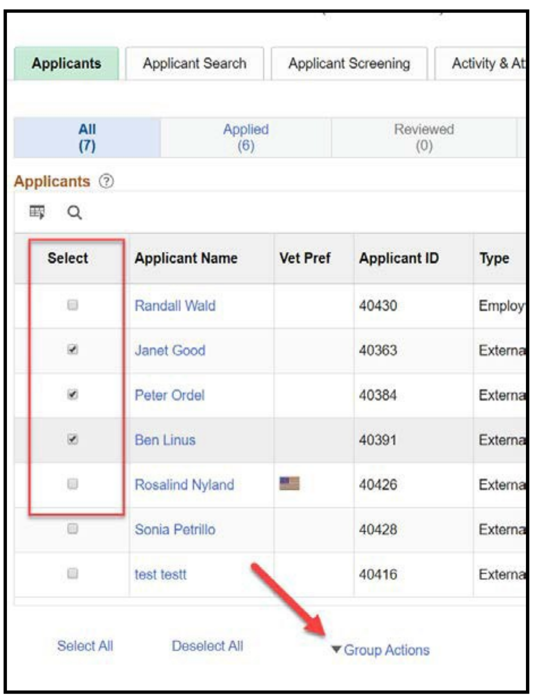
Use these menus to perform actions on a single applicant or application.

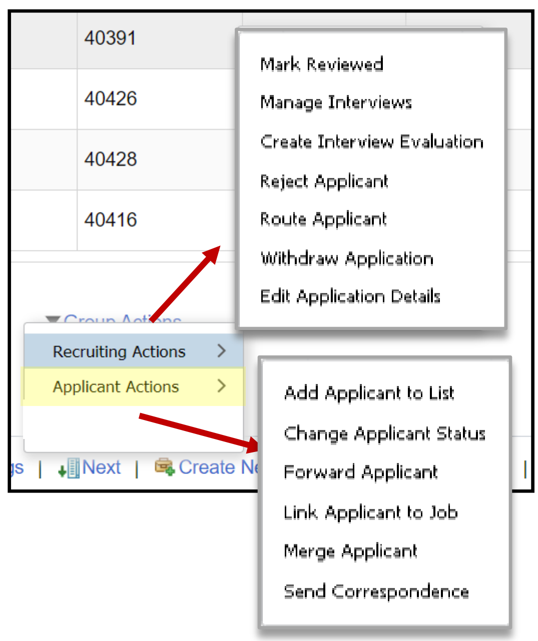




Group Actions

This menu displays below grids and lists the actions that you can perform on multiple grid rows.

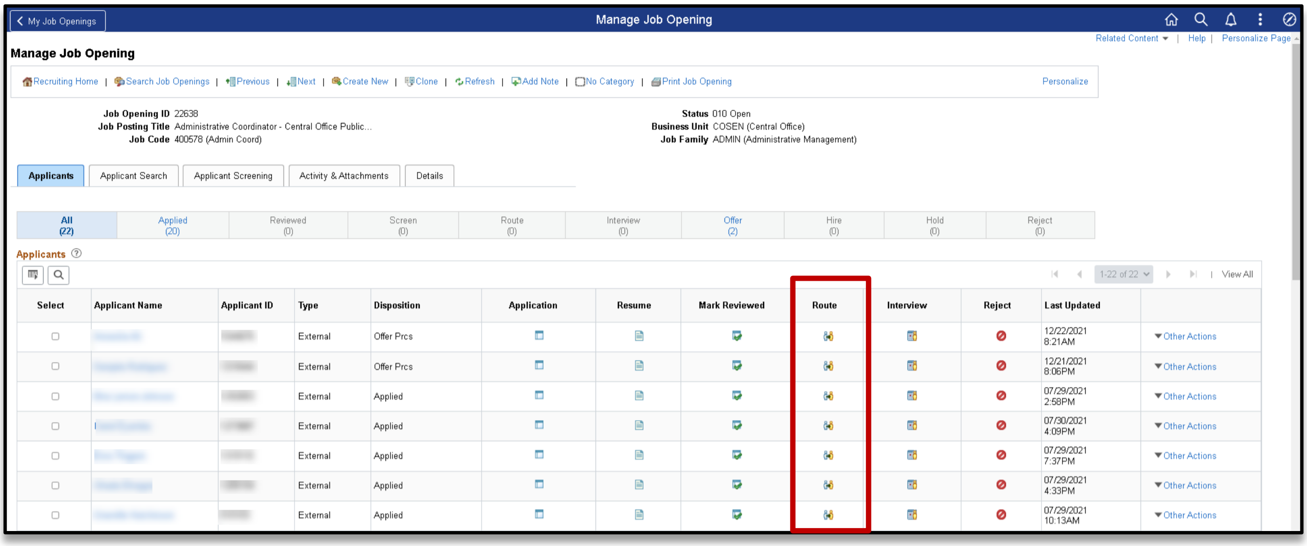




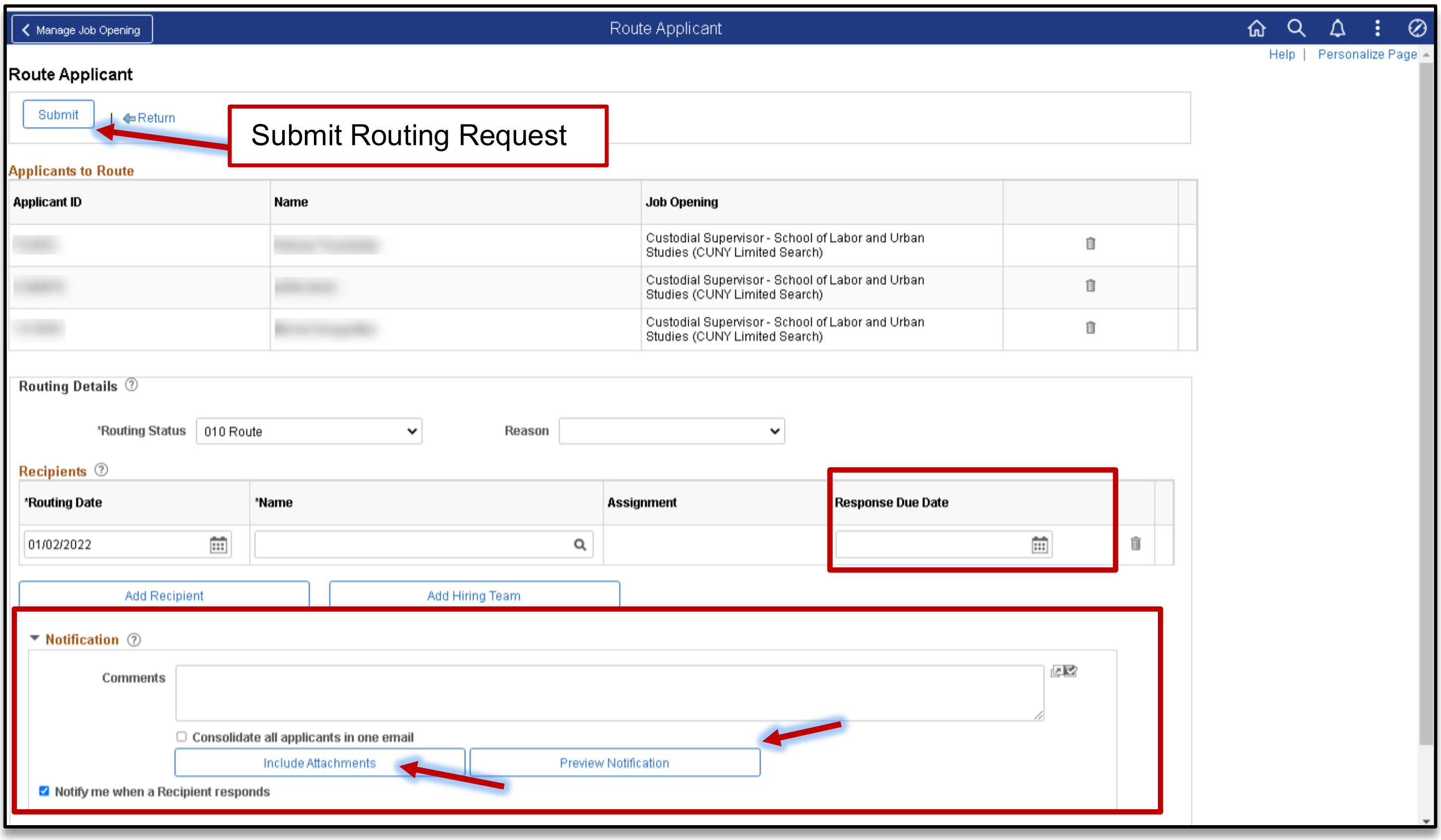
Route Applicant

Routing is the action of sending applicant information to recipients to provide input on the next step to take for the applicant. The **Route Applicant** action is available for individual applicants using the Route action icon and is also available as a group action.

Select applicants and then select **Group Actions > Recruiting Actions > Route Applicants**.



Route Applicant

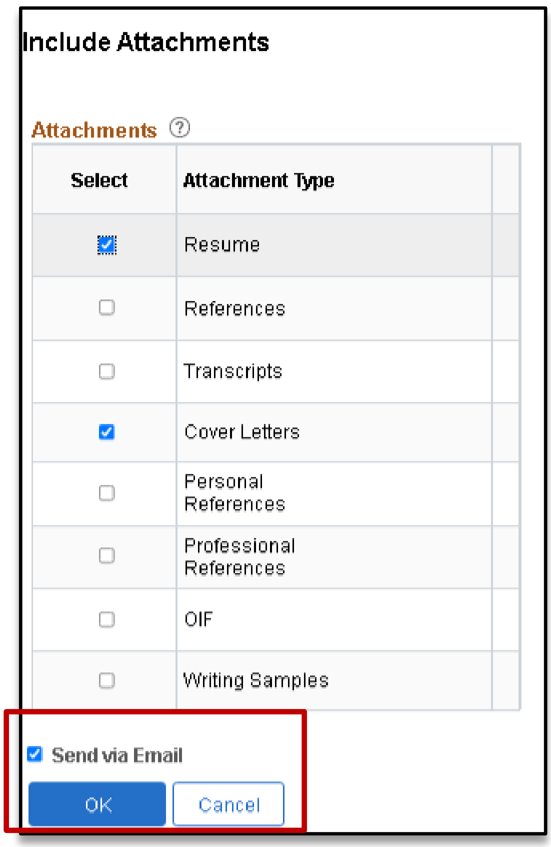


The Route Applicant page contains the following fields:

- **Applicants to Route:** This grid lists the names and Applicant IDs of the applicants that you are routing, along withthe job openings for which they are being considered.
- **Routing Status:** When initiating a routing request, choose a routing status that indicates that the routing has been sent and is in progress.
- **Reason:** Optionally select a reason for assigning the selected routing status.
- **Recipients:** Use the Recipients grid to identify the people whose feedback you are requesting.
- **Routing Date:** Displays the date that the routing was sent to this recipient. The default value is thecurrent date.
- **Name:** Enter the name of the person to whom you are routing the applicant.
- **Response Due Date:** Enter a date by which the recipient should respond with a recommendation regarding the applicant.
- **Add Recipient:** Click to add another recipient to the routing.
- **Add Hiring Team:** Click thebutton to add all of the hiring team members as routing recipients.
- **Comments:** Enter comments to be included in the routing request email notification.

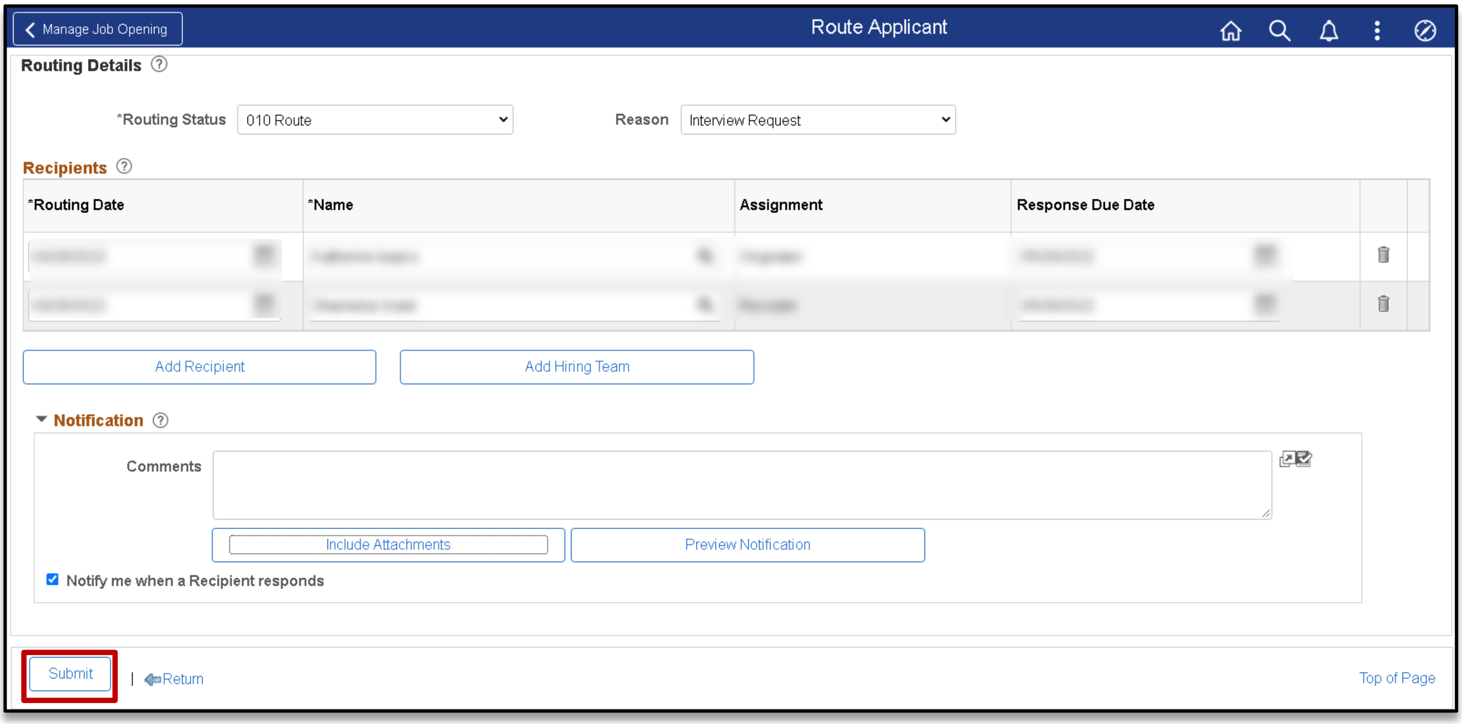
- **Consolidate all applicants in one email:** This check box is visible only if the routing includes multiple applicants. Select this check box to send a single email to each recipient. The email lists all of the applicants who are being routed. If the check box is not selected, the recipient receives a separate email notification for each applicant in the routing.
- **Include Attachments:** Click to access the **Include Attachments** page, where you choose which applicant attachment types to associated with the routing.
- **Preview Notification:** Click to access the Preview Notification page, where you can preview the email notification that will be sent to the recipient.
- **Notify me when a Recipient responds:** Select this check box if you want to receive a notification when recipients submit their responses using the self-service routing response page.

Click on the **Include Attachments** button to select attachments.



Click the **OK** button to proceed.

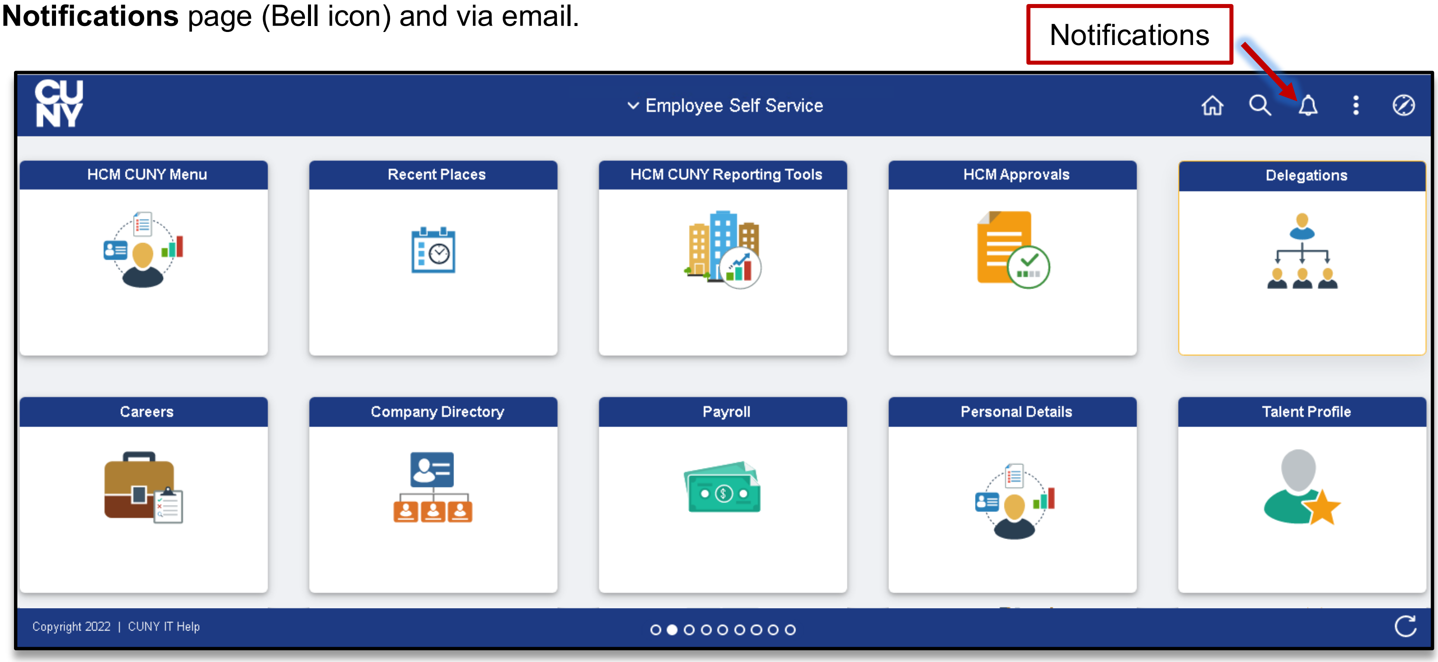
Click the **Submit** to save the route request.



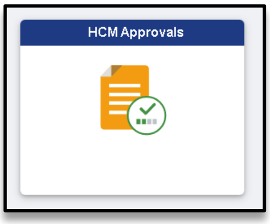
HCM Approvals

Navigation: **Employee Self-Service Homepage >HCM Approvals Tile**

The **Approvals** window provides centralized access to approvals. Additionally, alerts will be sent to the **Notifications** page (Bell icon) and via email.

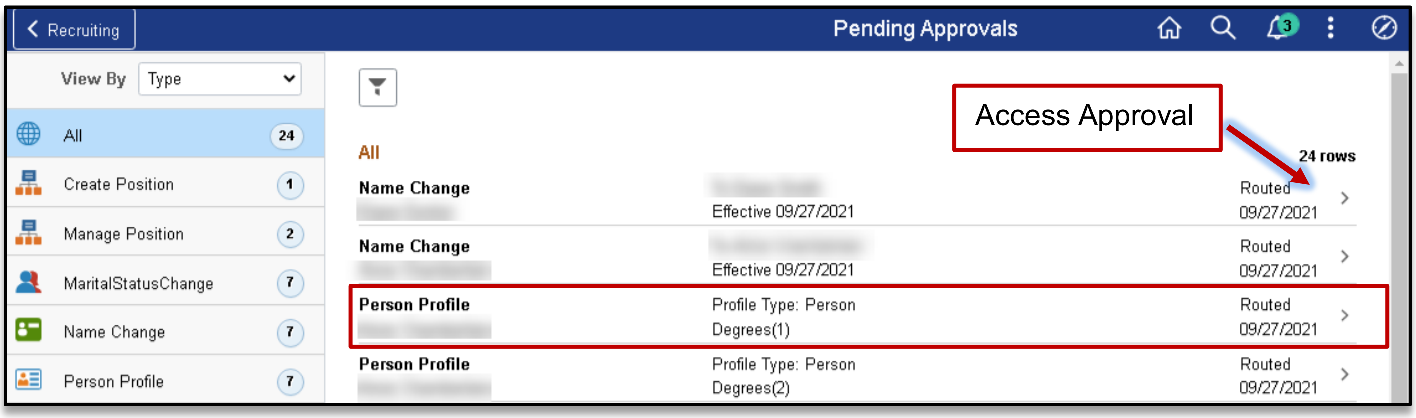


Alternatively, navigation from alerts displays specific approvals requiring action. Selecting the link navigates directly to the approval requiring attention.



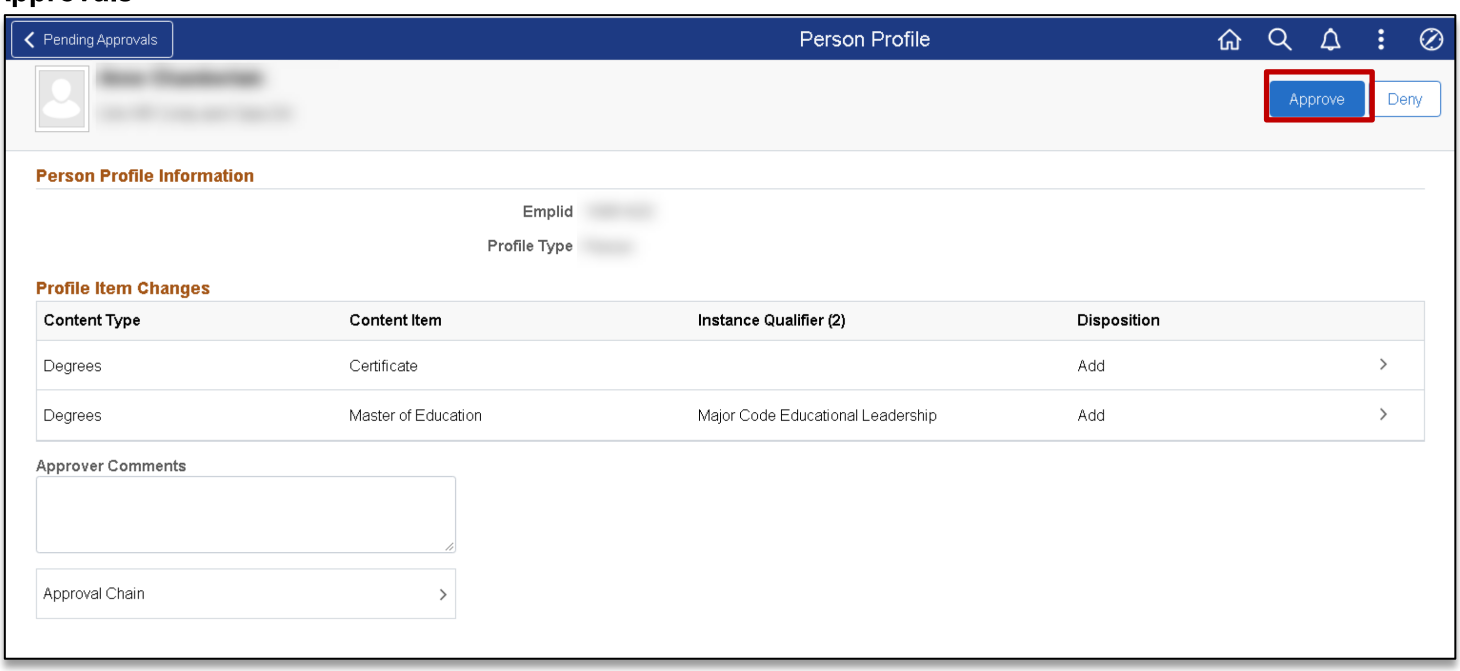
Click the **HCM Approvals** tile to review approvals across transaction types. Click a specific transaction requiring approval.

On the pending Approval page, review approvals across transaction types. Click a specific transaction requiring approval.



Review the pending approval.

Approvals



Approvals: Comments & Approval Chain

The approver may input comments. These comments are date and time stamped. Comments are visible to all users in the workflow process. Clicking the **Approval Chain**, displays a list of users within the approval process. The approver can view and access any attachments provided by the submitter. **Note:** Upon approval, the approval transaction is removed from the **Pending Approvals** page.