



# PageUp User Guide

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## Description

PageUp is an online Applicant Tracking System for managing the recruiting process for benefitted, non-benefitted, and graduate student employee hires within UMass Boston. Should you have any questions regarding the recruitment process, please contact Kim Burke or Henry Paquin in Human Resources at [kim.burke@umb.edu](mailto:kim.burke@umb.edu) or [henry.paquin@umb.edu](mailto:henry.paquin@umb.edu).

## Website information

### Login information

- <http://umass.pageuppeople.com>.
- From the login screen, enter your campus ID and password.
- *Select Boston for your campus from the dropdown list.*
- Select to login.

### Careers websites (Job Postings)

- UMass Boston: <https://hr.umb.edu/jobs>
- System Site: <http://careers.massachusetts.edu>

### Permissions

Based on the permissions that you have been granted in PageUp, not all features/functions described in this document may be available to you. Please email [kim.burke@umb.edu](mailto:kim.burke@umb.edu) or [henry.paquin@umb.edu](mailto:henry.paquin@umb.edu) if any questions.

## General guidelines for using PageUp

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

## Logging In

The link to log into PageUp can be found on the Human Resources website, under Careers. You will click on “Hiring Manager/Search Committee PageUp Log-in.” You will be prompted with the login screen, enter your campus ID and password. Select Boston for your campus from the dropdown list. Select to login.

Current Employment Listings and Returning Applicant Log-in	University of Massachusetts Boston Policy on Background Checks	Hiring Manager/Search Committee PageUp Log-in
	As a condition of employment, the university will conduct appropriate background reviews for all new hires once an offer has been accepted. This policy will be implemented in a manner consistent with the rights of privacy, equal opportunity, and academic freedom afforded to those who serve the university.	



University of Massachusetts

Secure Access Login

Campus User ID

Password

Boston

Login

**Important Signout Message:** You must always sign out completely from a UMass Secure Access Application. Please remember to click the application's Sign out or Logout link and close all internet windows.

## Dashboard


The screenshot shows the 'My Dashboard' for a hiring manager. The dashboard is organized into six cards, each representing a different task or status. The top navigation bar includes 'Jobs', 'People', 'Reports', 'Recent Items', 'Gina', and a help icon. The dashboard title is 'My Dashboard' and the welcome message is 'Welcome Gina, this is your Dashboard where you will see all your tasks organized in various stages.' The cards are: 'Position Description' (1 Under review), 'New Requisition' (0 Jobs open, 101 Team jobs open, New Requisition button), 'Approvals' (0 Jobs awaiting your approval, 0 Approved), 'Advertisements' (0 Advertisements), 'Search committee review' (0 Jobs requiring panel review), and 'Offers' (0 Offers awaiting your approval).

This dashboard is the landing page for the hiring manager permission group within the system.

A **Permission Group** determines what level access a PageUp user has within the system. There are different roles within the recruitment and hiring process and therefore the need for various levels of permission. Human Resources assigns users their permission group based on the needs of the department. The permission group with the most powerful role for each search will be the Hiring Manager. They will be responsible for creating requisitions, the day-to-day management of the search, applicant management, and will be the main point of contact with HR. Hiring Managers will have access to applicants and the submission of first round applicants.

This dashboard provides a summary of their current work and the ability to access jobs and applicants from the homepage. Jobs you have created will appear on your dashboard. Click **Dashboard** in the left side menu to view available options. You will see your jobs in the **Current jobs** column grouped by job status. The job statuses can be expanded/collapsed to view your job details.

### [Hiring Manager Information– access to the job](#)

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

## Field types

Fields in PageUp are filled in by entering data directly on the screen or selecting from drop down or lookup lists. Described here are some common field types and how to fill them in.

### [Mandatory fields](#)

Mandatory fields are flagged with a star. These must be completed when filling in a screen.

## Lookup or Binoculars fields

Binocular fields are used to allow users to select from a large set of data e.g. users or departments. To populate binocular fields, click on the binocular icon to view a pop up window which will allow you to search through the data. Select the data you would like to enter by clicking on the appropriate row, then click OK.

## Lists of information

All lists of information throughout the system support the following functions:

- Enhanced navigation between pages of information.
- Show or hide columns.
- Change the number of records displayed per page.
- Show all records.

## Navigation

### Navigating between pages of information

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

### Navigation functions at a glance

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

Quick page navigations is provided at the top of the list

Job number	Recruiter	Status	Title	Date entered	Applications					
512166	DR	Sourcing	Customer Service Consultant*	29 Apr 2009	47					
512357	KL	Approved	Human Resources Officer	1 Oct 2010	24					
512175	DR	Offer	APAI Scholarship - Faculty of Science	26 May 2009	22					
512170	GR	Sourcing	Account Manager	30 Apr 2009	19					
512152	GR	Offer	Implementation Coordinator	7 Apr 2009	17					
512406	RHR	Screening	VP Workforce Planning	1 Sep 2011	12					
512146	KR	Sourcing	Graduate Engineering - South Australia	24 Mar 2009	11					
512195	DR	Sourcing	MINE Lead Field Mechanical Engineer	24 Jun 2009	9					
512392	DR	Approved	Senior Staffing Advisor	12 Jul 2011	9					
512402	SR	Sourcing	Senior Mining Engineer	25 Aug 2011	9					
512242	DR	Pending	Senior Administration Assistant	10 Oct 2009	6					
512409	RHR	Approved	Employee Benefits Specialist	1 Sep 2011	6					
512215	KR	Approved	.Net Developer	20 Aug 2009	5					
512204	SP	Approved	Contractor	9 Jul 2009	4					
512238	GR	Pending	Account Manager	12 Oct 2009	3					
512326	CR	Approved	Account Manager	26 Jul 2010	3					
512220	DN	Approved	Account Manager	9 Sep 2009	1					
512298	GR	Pending	Account manager	12 Apr 2010	1					
512321	JR	Interviewing	Account Manager -CN	18 Jun 2010	1					
512311	NF	Approved	Account Manager Referral	16 Aug 2010	1					

Page 1 of 2 [Navigation icons] Show all records Jump to page: [Input field] [Button]

Records 1 to 20 of 24

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

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

Jump directly to any page in the results

### Navigate between pages

Click on the appropriate navigation icon, or enter a page number into the Jump to page field and click the button. You

will be taken to the page you selected.

### Showing all records

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

1. Click the Show all records link at the bottom of the list. If there are more than 500 records in your list, a warning message will be displayed confirming that only the first 500 records will be returned.
2. The screen will re-load will all records displayed. Note: Depending on the amount of information being returned, this may take up to a few minutes to complete.
3. To return to your standard list of information, click the Return to standard list link at the bottom of the list.

## Recruitment

### Recruit for a position

Before recruiting for an approved position, you should familiarize yourself with certain Roles found within the Requisition. PageUp Roles and Terms are found at the end of this document.

### Creating a Requisition for posting

Each new **Requisition** must contain an approved job description, evaluation memo and the position number that corresponds to the position being filled. To confirm the correct approved job description, please contact Tom Kelly at [thomas.kelly@umb.edu](mailto:thomas.kelly@umb.edu). To confirm the correct position number, please contact Gerald Ellis at [gerald.ellis@umb.edu](mailto:gerald.ellis@umb.edu). **To ensure data integrity with HR Direct and PageUp reporting, position number data must correspond exactly with the position being filled.**

The screenshot displays the 'My Dashboard' interface for a user named Gina. The dashboard is organized into several task cards. The 'New Requisition' card is highlighted with a red circle around the 'New Requisition' button. The dashboard also shows a 'Position Description' card with one item under review, an 'Approvals' card with zero items awaiting approval, an 'Advertisements' card with zero advertisements, a 'Search committee review' card with zero items requiring panel review, and an 'Offers' card with zero offers awaiting approval. The top navigation bar includes links for Jobs, People, Reports, Recent Items, and Gina's profile.

### Selecting a Posting Template

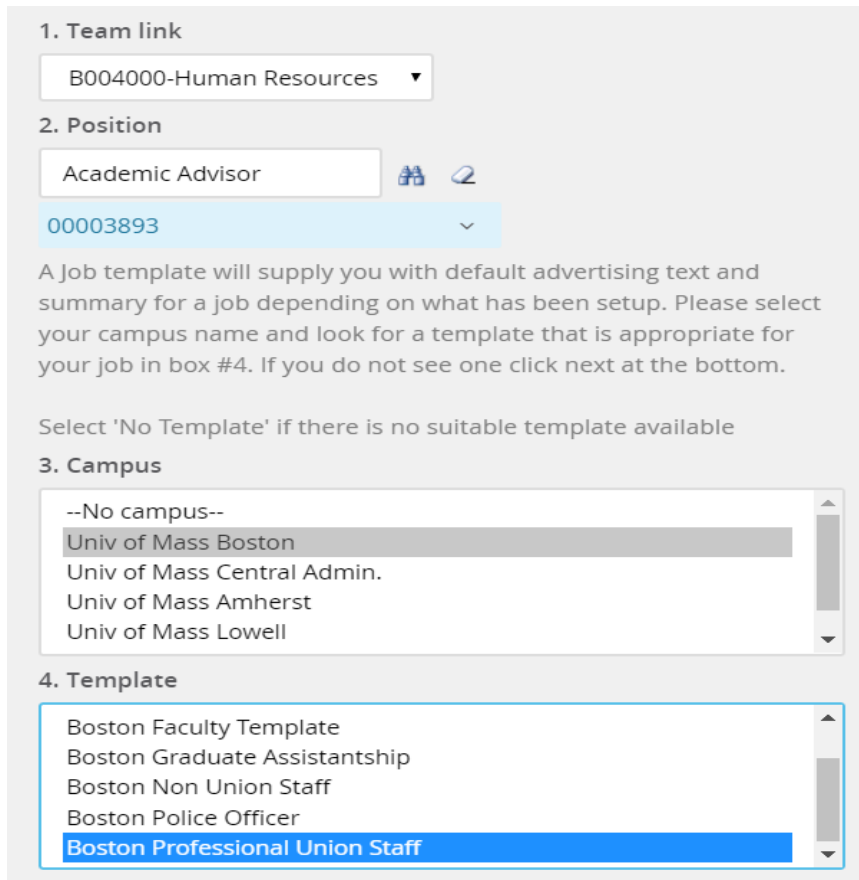
Team Link will default to the department you have been assigned to in HR Direct. If you have any questions regarding this team access, please contact Human Resources.

Enter the position number. Select **UMass Boston** from the Campus drop-down menu. Select the **Posting Template** that corresponds with the



position being filled.

Select **Next** to open the **Requisition**.



1. Team link  
B004000-Human Resources

2. Position  
Academic Advisor  
00003893

A Job template will supply you with default advertising text and summary for a job depending on what has been setup. Please select your campus name and look for a template that is appropriate for your job in box #4. If you do not see one click next at the bottom.

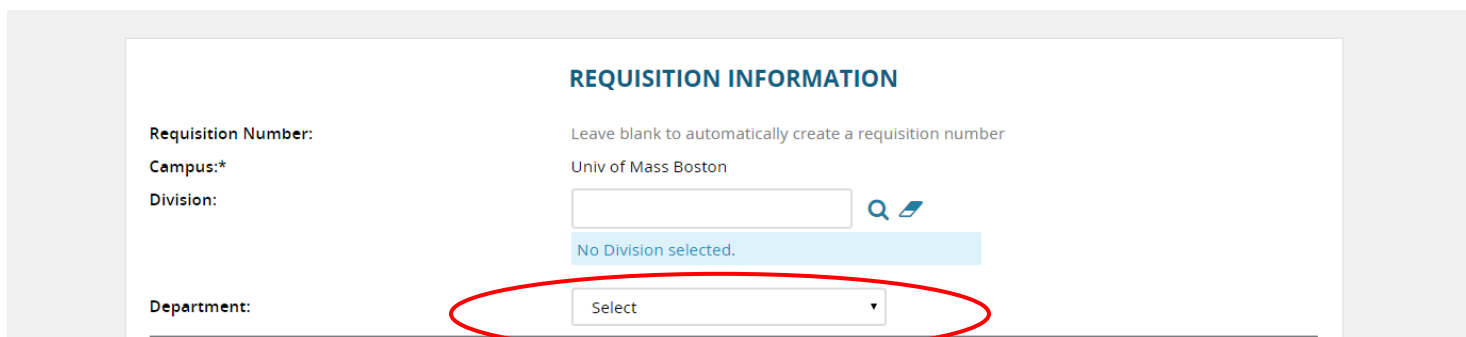
Select 'No Template' if there is no suitable template available

3. Campus  
--No campus--  
Univ of Mass Boston  
Univ of Mass Central Admin.  
Univ of Mass Amherst  
Univ of Mass Lowell

4. Template  
Boston Faculty Template  
Boston Graduate Assistantship  
Boston Non Union Staff  
Boston Police Officer  
Boston Professional Union Staff

### Department and Position Number

Select your department from the Department drop-down menu.



**REQUISITION INFORMATION**

Requisition Number: Leave blank to automatically create a requisition number

Campus\*: Univ of Mass Boston

Division: No Division selected.

Department: Select

In the **Position No** search field you should enter the Position Number that corresponds to the position being filled, if not previously entered, then hit tab. A Blue Box under the Position No will populate and the information should mirror the Blue Box below. **Please note that the position number entered must be an approved budgeted position number and all data must match the position being filled.**

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

**NUMBER OF POSITIONS**

Positions:

Position no.	Type:	Applicant	Application status
Assistant Director	New	-	-

00028295  
Assistant Director  
Campus: Univ of Mass Central Admin.  
Department ID: C990207  
Department: PO-Human Resources  
Position Reports To:  
Job Code: P00125  
Pay Grade:  
Union Code: P72Non-Unit Professional  
IPEDS Code: Management  
EEO-1 Category: First/Mid Level Officials  
EEO-6 Category: Executive/Admin/Managerial  
SOC: 11-1021-General and Operations Managers  
FLSA: X-No FLSA Required  
Job Group: 14

New:  Replacement:

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

### Recruit for Multiple Positions with the same job description

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

You are able to recruit for multiple positions for the same Job Description, however, ***every position requires a position number***. For example, if there are 3 position numbers that need to be filled for one **Job Requisition**, you can enter the number 2 and the system will open two more job slots. You will need to assign an approved **Position Number to each opening**. As applicants are hired, the system will attach the appropriate **Position Number** and populate the applicant name and offer status. Once the final position is filled, the system will prevent additional applicants from being hired.

NUMBER OF POSITIONS

Positions:

Position no	Type:	Applicant	Application status
1 Assistant Director 00028205 Assistant Director Campus: Univ of Mass Central Admin. Department ID: C990207 Department: PO-Human Resources Position Reports To: Job Code: P00125 Pay Grade: Union Code: P72Non-Unit Professional IPEDS Code: Management EEO-1 Category: First/Mid Level Officials EEO-6 Category: Executive/Admin/Managerial SOC: 11-1021-General and Operations Managers FLSA: X-No FLSA Required Job Group: 14	New	-	-

New:  Replacement:  **Add more**

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

Department:

Select

NUMBER OF POSITIONS

Positions:

Position no	Type:	Applicant	Application status
1 Assistant Director 00028205 Assistant Director Campus: Univ of Mass Central Admin. Department ID: C990207 Department: PO-Human Resources Position Reports To: Job Code: P00125 Pay Grade: Union Code: P72Non-Unit Professional IPEDS Code: Management EEO-1 Category: First/Mid Level Officials EEO-6 Category: Executive/Admin/Managerial SOC: 11-1021-General and Operations Managers FLSA: X-No FLSA Required Job Group: 14	New	-	-
2 <input type="text"/> No position selected.	New	-	-
3 <input type="text"/> No position selected.	New	-	-

New:  Replacement:  **Add more**

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

### Position Background and Working Title

All requisitions must have the correct **Working Title/ Posting Title** for the job description being filled.

If the requisition is backfilling a previous incumbent, details of that incumbent must be included in this section as well.

an existing employee

Reason:	<input type="text" value="Select"/>
Current/Previous Incumbent:	<input type="text"/>
Previous incumbent's salary:	<input type="text"/>
Incumbent termination date:	<input type="text"/>
Working Title/ Posting Title:*	<input type="text" value="Boston Professional Union Staff"/>
If temporary, please specify duration:	<input type="text"/>

### Position Details

Complete the fields in the Position Details section. If you are filling a union position, Pay Grade is a required field.

POSITION DETAILS	
Position/Classification Type:*	<input type="text" value="Select"/>
Date opened:	<input type="text" value="18 Apr 2019"/>
Date filled:	<input type="text"/>
Hours Per Week:	<input type="text"/>
Is this a 52 week position?:	<input type="radio"/> Yes <input type="radio"/> No
If not please specify otherwise:	<input type="text"/>
Shift and Daily Work Schedule (ie M-F 8:30am - 5pm):	<input type="text"/>
Pay Grade:	<input type="text"/> <span style="background-color: #e0f0ff; padding: 2px;">No pay grade selected.</span>
Salary range:	
Benefited Position:	<input type="radio"/> Yes <input type="radio"/> No
Recruitment process:*	Boston Professional Union Staff

### Funding Source, Percentage and Speedtype

You should indicate whether this position is funded via State Funds or Grants, the primary percentage of salary dedicated to the payroll and your department’s payroll Speedtype.

FUNDING INFORMATION

How is this position funded?:

HR Speedtype/Combo Code:

Union-Boston:

### Search Committee

Search committees are not required. If you are choosing to, select “Yes” that you would like to utilize a Search Committee and identify your [Search Committee Chair](#). Using the magnifying glass will help you easily search for UMass employees. **Please remember to allow pop-ups within your browser.**

SEARCH COMMITTEE

Do you wish to utilize a search committee?:  Yes  No

Not required, but if used, search committees for PSU searches require at least one PSU member.  
For PSU Positions: Indicate number of candidates in final round as requested by the Hiring Manager (normally three but never more than five.)

How many finalists will you have?:

Search committee chair:

No user selected.

Search committee members:

Recipient	Remove all
No Search committee member selected.	

Search committee member information:

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

Search committee members:

Add Search committee member

Recipient

No Search committee member selected.

Search committee member information:

Search - Google Chrome

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

First name:  Last name:  Team:  Search

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

Search committee member information:

No search committee member selected.

Done Add new search committee member

## Posting Details

In this section, indicate if an external advertisement is needed for your posting and the speed type for recharge purposes. HR will confirm final advertising costs prior with hiring departments prior to placement.

POSTING DETAILS

**Open:**  at : AM

**Close:**  at : AM

**Speed Type for Advertising:**

**Please list any other advertising sources:**

**Posting location:\*** UMass Boston

**Posting summary:**

Posting text:

**Posting Location** should always be UMass Boston.

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

Posting summary:

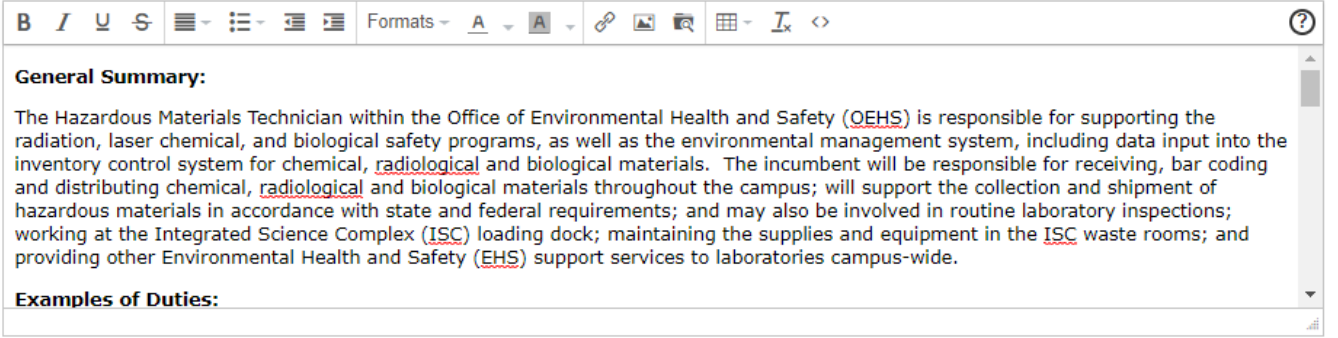
## Current opportunities

POSITION	DEPARTMENT	CLOSES
<a href="#">Hazardous Material Technician</a>	Environmental Health & Safety	8 Mar 2019

The Hazardous Materials Technician within the Office of Environmental Health and Safety (OEHS) is responsible for supporting the radiation, laser chemical and biological safety programs, as well as the environmental management system, including data input into the inventory control system for chemical, radiological and biological materials.

The **Posting Text** must be copied and pasted directly from the HR approved **Position Description**.

Posting text:



**General Summary:**

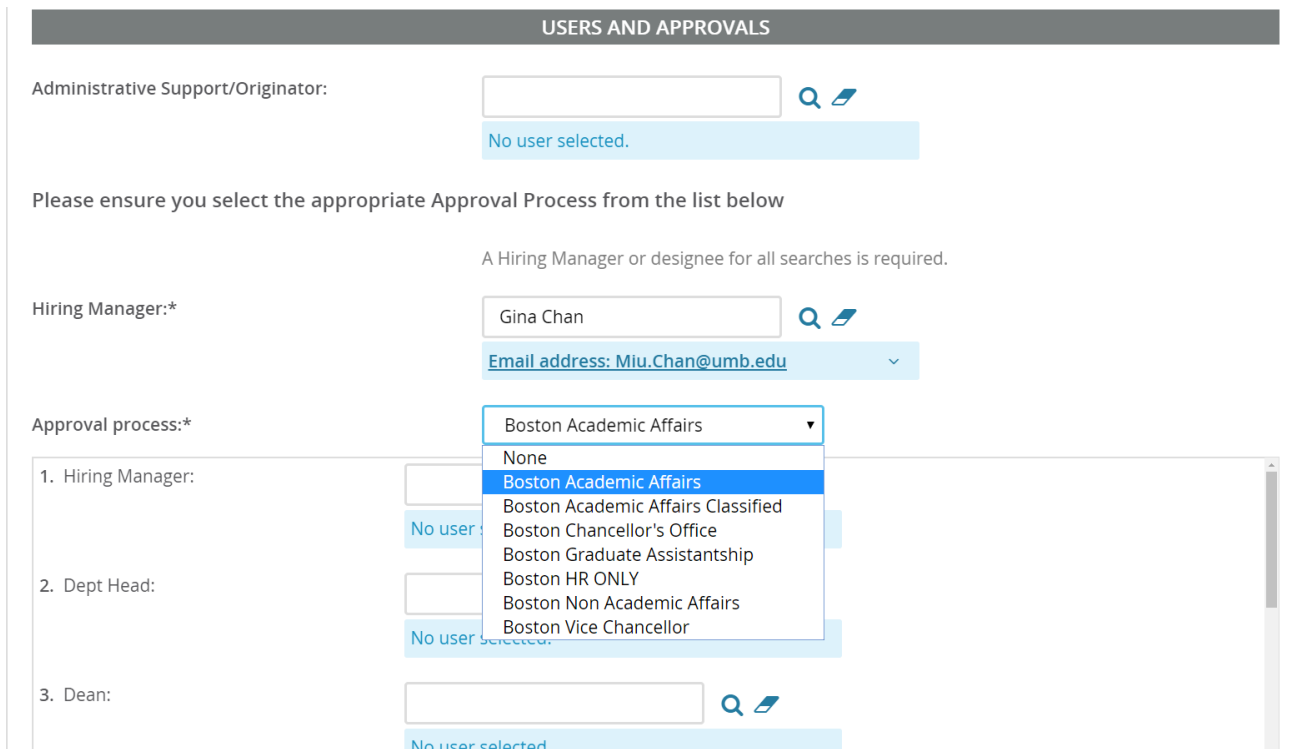
The Hazardous Materials Technician within the Office of Environmental Health and Safety (OEHS) is responsible for supporting the radiation, laser chemical, and biological safety programs, as well as the environmental management system, including data input into the inventory control system for chemical, radiological and biological materials. The incumbent will be responsible for receiving, bar coding and distributing chemical, radiological and biological materials throughout the campus; will support the collection and shipment of hazardous materials in accordance with state and federal requirements; and may also be involved in routine laboratory inspections; working at the Integrated Science Complex (ISC) loading dock; maintaining the supplies and equipment in the ISC waste rooms; and providing other Environmental Health and Safety (EHS) support services to laboratories campus-wide.

**Examples of Duties:**



### Users and Approvers

In the Users and Approvers section, you will identify the appropriate **Approval Process** and ensure that a **Hiring Manager** has been assigned to the requisition.

Whoever initiated the recruitment process, their name will automatically populate into the **Hiring Manager** field. The Administrative Support/Originator should put in the correct Hiring Manager's name in that field and add their name into the **Administrative Support/Originator's** field. The appropriate approval process for the department should be selected from the Approval Process drop down list.






**USERS AND APPROVALS**



Administrative Support/Originator:     
No user selected.



Please ensure you select the appropriate Approval Process from the list below



A Hiring Manager or designee for all searches is required.

Hiring Manager:\*     
Email address: Miu.Chan@umb.edu

Approval process:\*  

1. Hiring Manager:     
No user selected.

2. Dept Head:     
No user selected.

3. Dean:     
No user selected.



- Boston Academic Affairs
- None
- Boston Academic Affairs
- Boston Academic Affairs Classified
- Boston Chancellor's Office
- Boston Graduate Assistantship
- Boston HR ONLY
- Boston Non Academic Affairs
- Boston Vice Chancellor

After selecting an approval process, names may prepopulate into the approval process, however the user will have the ability to change names within the approval process. Human Resources advises you not to change the names that



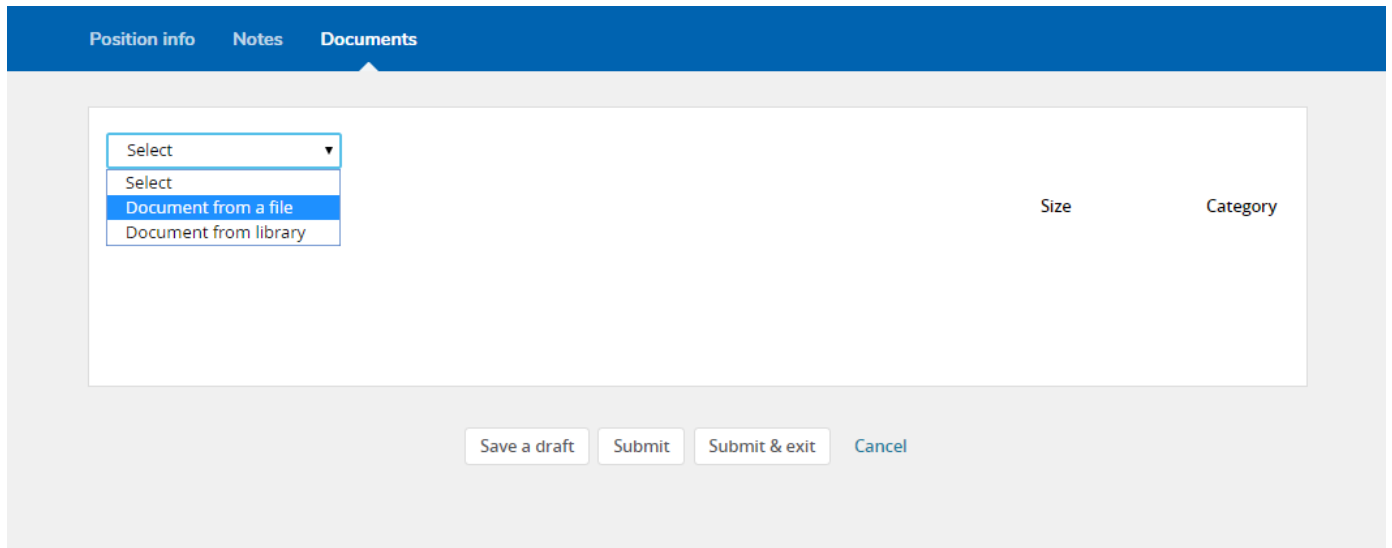
populate unless you are aware that an individual is on vacation or a name is incorrect. Should names need to be updated after submission, please contact Human Resources. Names within the sections below will all receive emails at different stages of the process. The **Hiring Manager** and **Administrative Support/ Originator** will receive an email when the Requisition has been fully approved. Approvers will receive email notifications sequentially. Once a requisition is fully approved, Human Resources will post the job.

An **HR recruitment team member** will need to be indicated on the requisition. Please refer to the departmental distribution list for your representative.

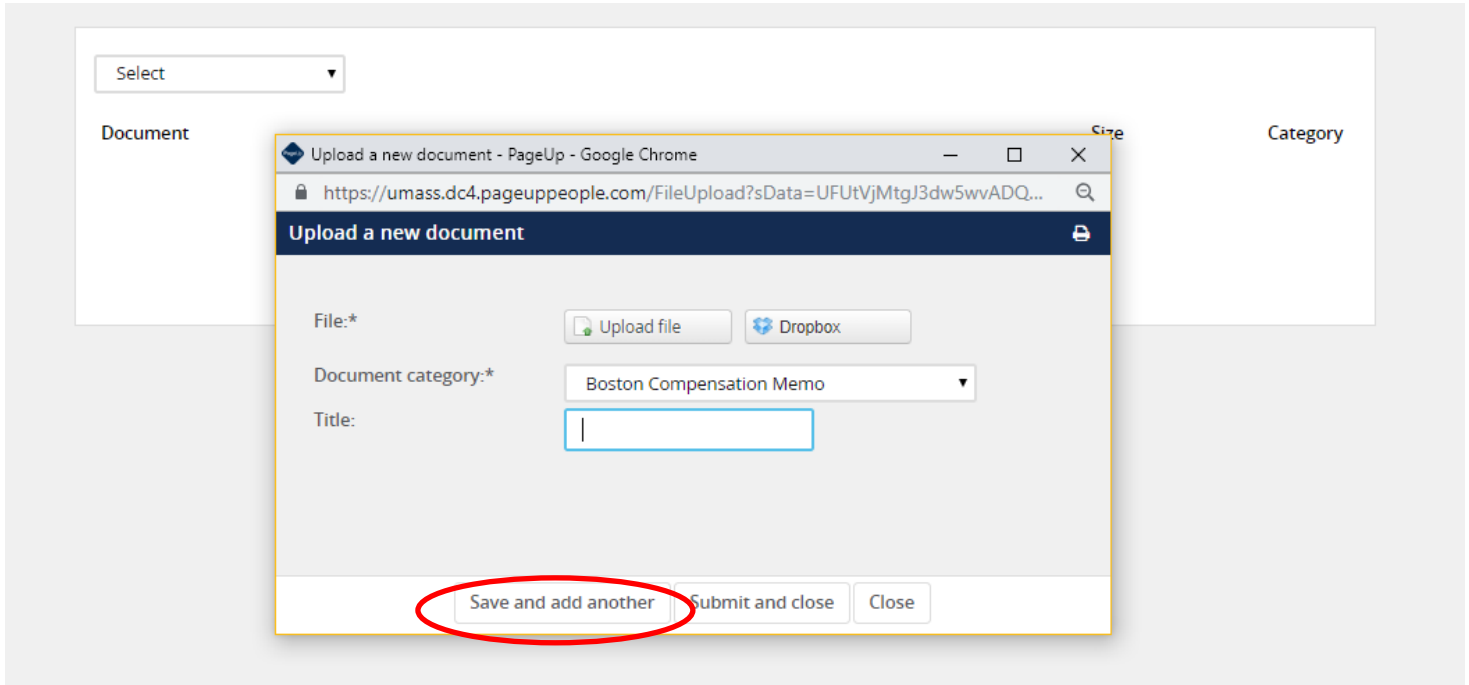
Human Resources:\*     
No user selected.

### Adding Documents

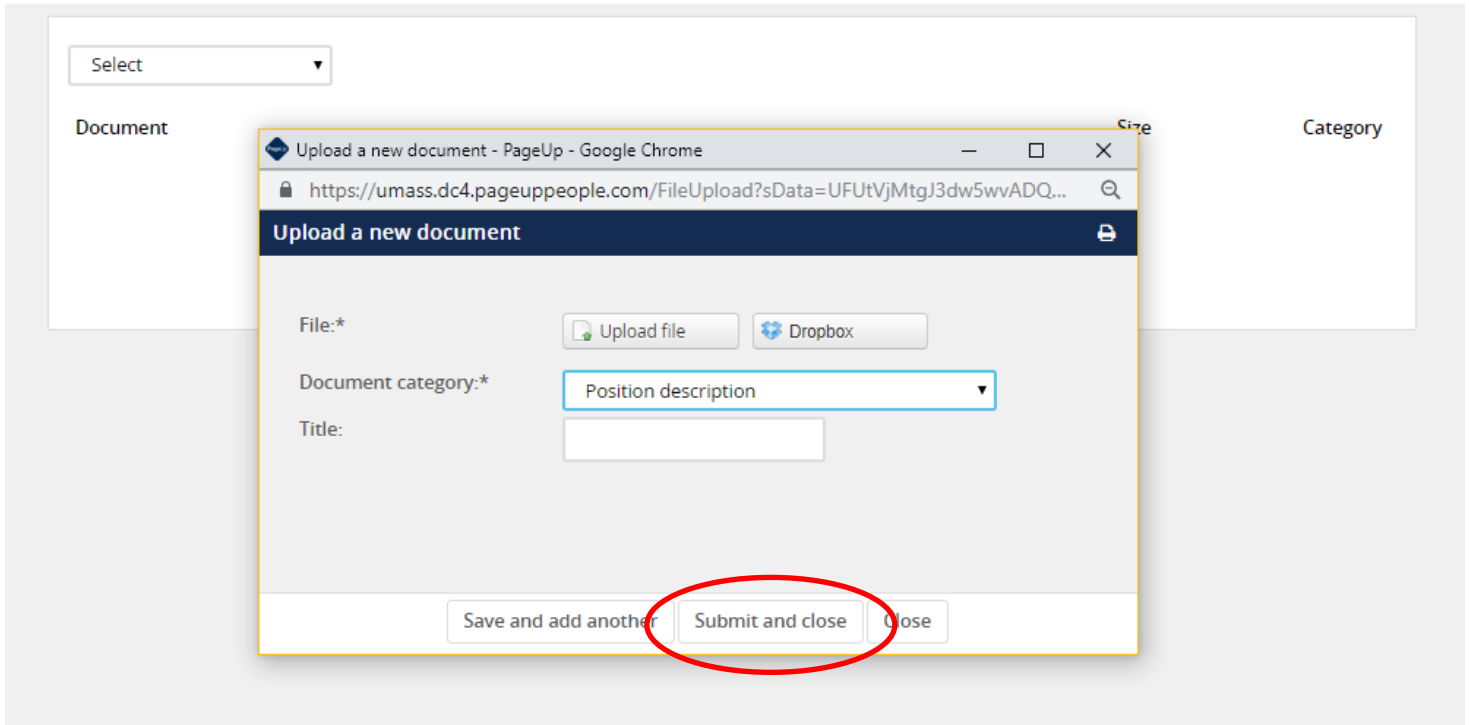
Before saving and submitting the Requisition, the approved Job Description and Evaluation Memo must be attached to the **Documents** tab of the Requisition.



Select Boston Compensation Memo from the Document category drop-down menu. Once the document is uploaded, select **Save and Add Another** to add the position description.



Select Position Description from the Document category drop-down menu. Once document is uploaded, select **Submit and Close**.



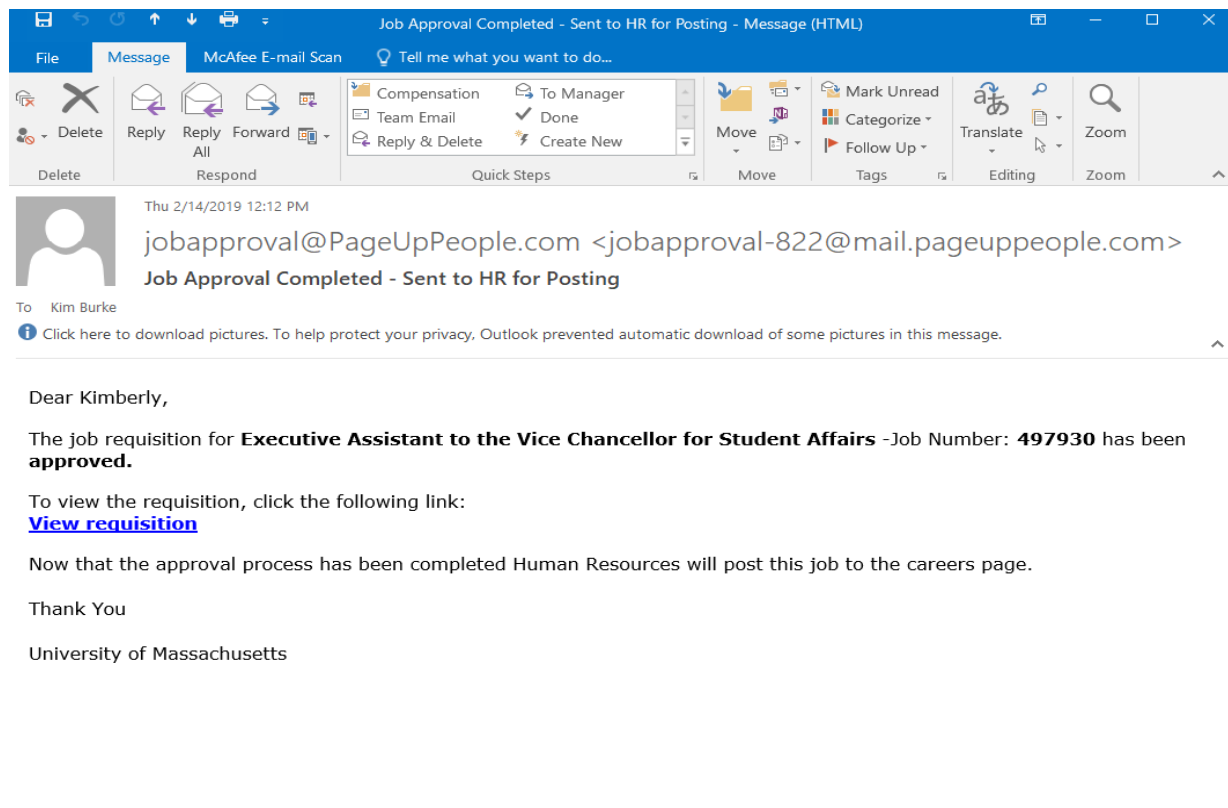
**Note:** If you are requesting a Posting Waiver, the memo that explains the reason for a waiver, position description, and evaluation memo must be attached to the Requisition before saving and submitting.

## Saving and Submitting the Requisition

- Selecting **Save a Draft** can be used when you need to save the Requisition you are working on without starting the approval process.
- **Submit** will save and begin the approval process on your Requisition.
- **Submit and Exit** will save and begin the approval process and exit your screen back to the home screen.
- **Cancel** will exit the Requisition without saving.

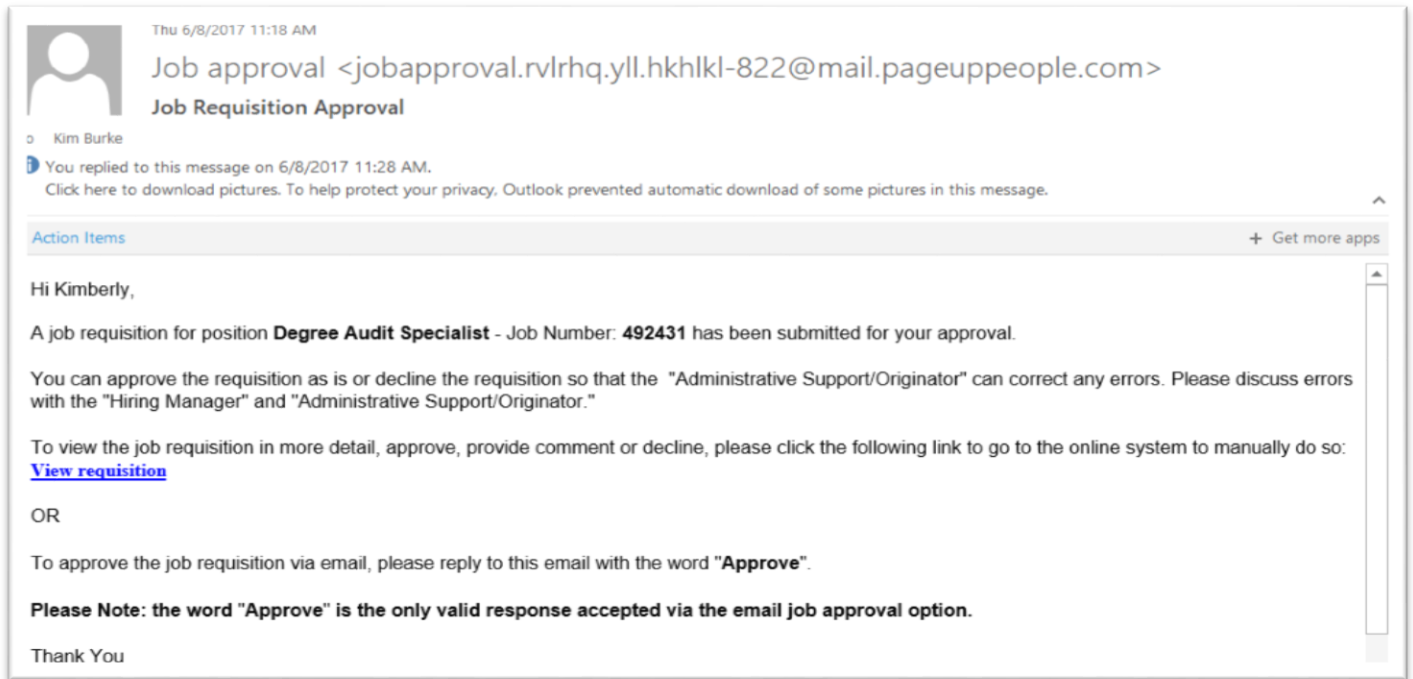
Save a draft   Submit   Submit & exit   Cancel

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

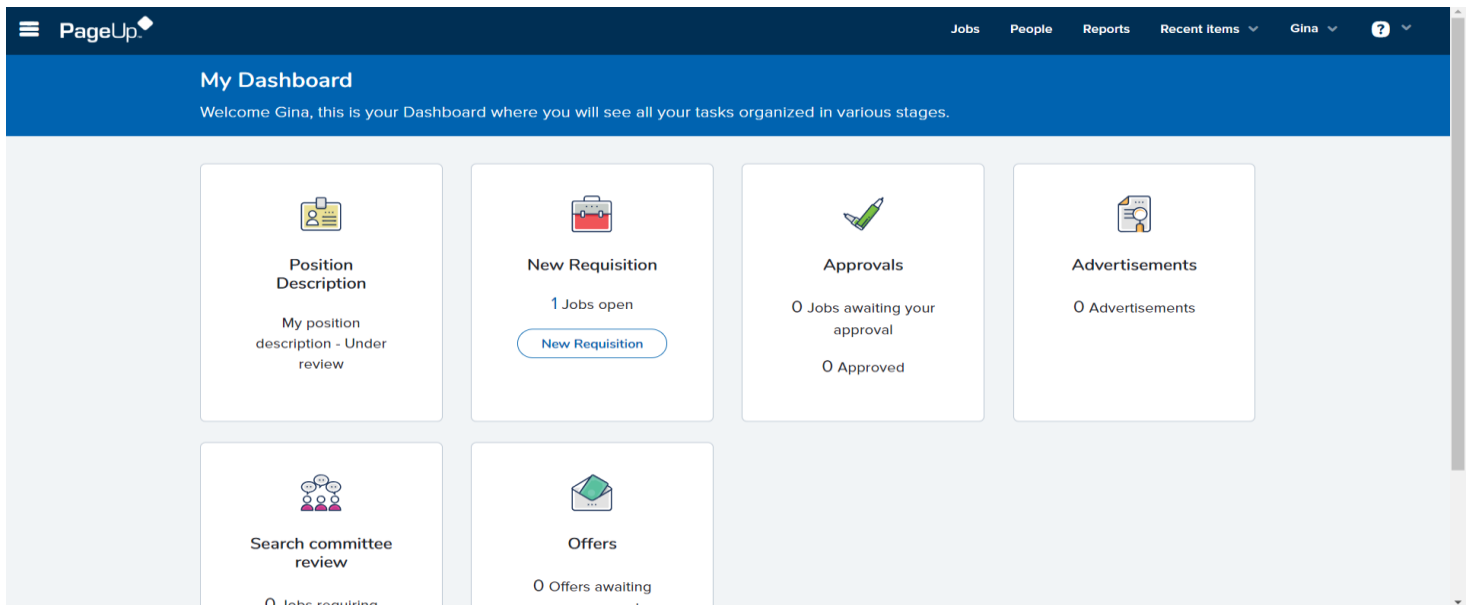


## Approving a job

Users will receive an email notifying them to review and approve/decline a job. This email will have instructions on how to approve the job; you can do this either by replying to the email with the word **Approve** or you can login and approve the **Requisition**. **DO NOT FORWARD APPROVAL EMAILS TO OTHER USERS.**



You can access these jobs by clicking the **Approvals** tile on your dashboard. The number of positions to approve will be included there and you will click **View** to see the job you are approving and review the details.



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

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

### Declining a job

Scroll down to the bottom of the position information tab of the requisition, click **Decline**. A pop-up requesting a reason for your decline will be displayed – this is mandatory. **Save**.

### Restart an approval process

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

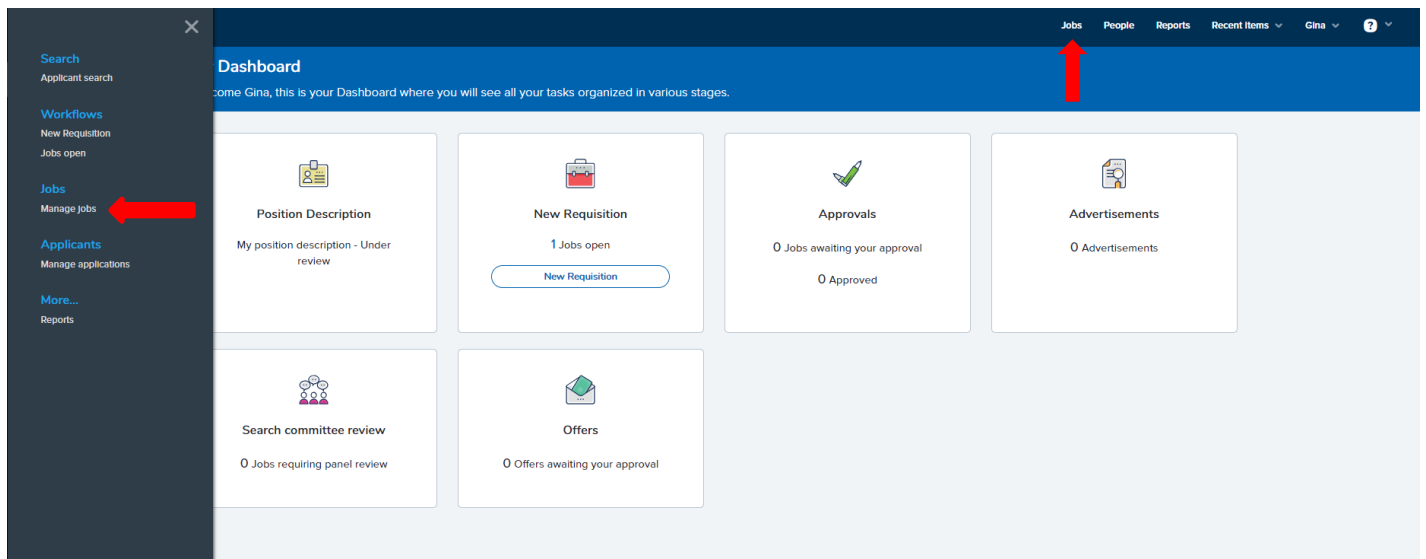
### Assigning a different approver

Depending on your permission group you may be able to assign a different approver for a particular point of the approval process. Back in the approval section of the requisition, click **Edit**. A pop-up will appear showing the approvers for this job. If you have permission you will be able to clear a name from any box where the approver has not yet approved and add a different user.

## Job Requisitions – Searching and Managing

### Searching for jobs via manage jobs

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



The screenshot displays a user dashboard with a dark blue header and a light blue sidebar. The header contains navigation tabs: 'Jobs', 'People', 'Reports', 'Recent Items', 'Gina', and a help icon. The sidebar lists various menu items: 'Search', 'Applicant search', 'Workflows', 'New Requisition', 'Jobs open', 'Jobs', 'Manage Jobs', 'Applicants', 'Manage applications', 'More...', and 'Reports'. A red arrow points to the 'Jobs' tab in the header, and another red arrow points to the 'Manage Jobs' option in the sidebar. The main content area is titled 'Dashboard' and includes a welcome message: 'Welcome Gina, this is your Dashboard where you will see all your tasks organized in various stages.' Below this are six cards representing different job-related tasks: 'Position Description' (My position description - Under review), 'New Requisition' (1 Jobs open, with a 'New Requisition' button), 'Approvals' (0 Jobs awaiting your approval, 0 Approved), 'Advertisements' (0 Advertisements), 'Search committee review' (0 Jobs requiring panel review), and 'Offers' (0 Offers awaiting your approval).

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

## Sorting jobs

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

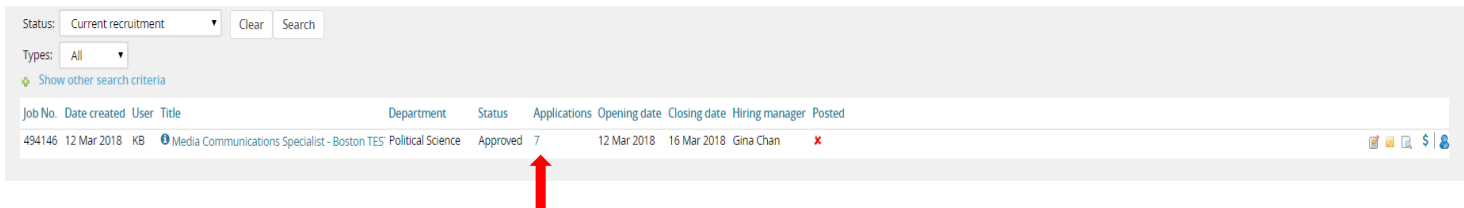
## Manage Applicants

### Navigating to the applicants

Depending on the role you have in the recruitment process, you will have access to review applicants to the positions you are recruiting.

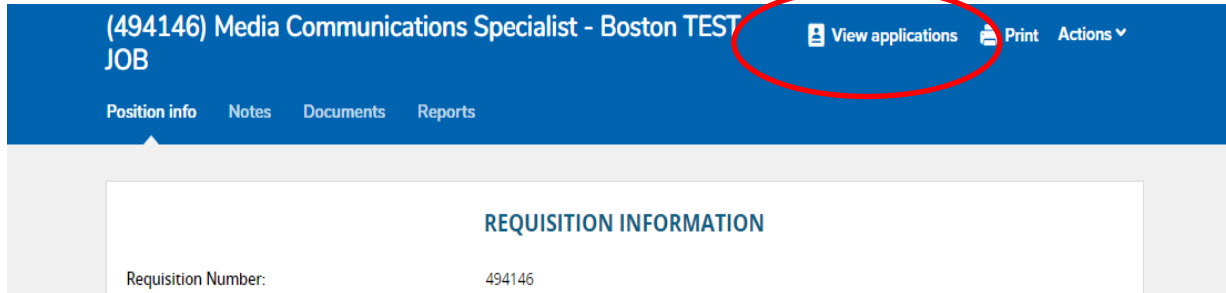
To navigate to the applicants, there are several options.

Once open to the job list, the number of applications is displayed and can be selected.



Job No.	Date created	User	Title	Department	Status	Applications	Opening date	Closing date	Hiring manager	Posted
494146	12 Mar 2018	KB	Media Communications Specialist - Boston TES	Political Science	Approved	7	12 Mar 2018	16 Mar 2018	Gina Chan	x

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



(494146) Media Communications Specialist - Boston TEST JOB

View applications Print Actions

Position info Notes Documents Reports

### REQUISITION INFORMATION

Requisition Number: 494146




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

The screenshot shows a recruitment system interface titled "New Posting on 3.1.17 (492300)". It features a table with columns for Submitted, Status, Pref Name, First name, Last name, Phone, Mobile, Email, Country, State, City, Employee, Source, and Sub-source. Two rows of applicant data are visible. Below the table, callout boxes identify: "Date Received" (Submitted), "The status each applicant is in for this position" (Status), "Candidate name and contact details" (Pref Name, First name, Last name, Phone, Mobile, Email), "Employee Referral" (Employee column with a smiley icon), "Source and sub-source of applicant" (Source and Sub-source), and "Details below" (View application, View Resume, Download Resume, View Answers).

Submitted	Status	Pref Name	First name	Last name	Phone	Mobile	Email	Country	State	City	Employee	Source	Sub-source	View application
1 Mar 2017	Hiring Manager review s: Bill	Bill	Chase	774-435			wchase@umassp.edu	United St. Massachusetts	Shrewsbu		Other	EmpRef		View application
1 Mar 2017	Minimum Qualifications: Carol	Carol	Dugard	774435			ecaj953@verizon.net	United St. Massachusetts	Shrewsbu		Internet HEJ			View application

### Viewing an applicant's resume and application form

On the same line as the applicants name, on the far right you will see three icons and the words View application.

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

### Viewing an applicant card

**Hiring Managers** have access to view the applicant card which includes the applicant's personal details, job application information, previous history and communications, resumes and application forms, etc. Choose an applicant in the system. Search for them via **Manage applications** in the left side menu. Search by your job and view your applicant. Click **View Application** to see the applicant card.

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

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

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

### Applicant history section

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

## Changing the Applicant Status

The screenshot displays the applicant summary page for Mickey Mouse. The top navigation bar shows the user's name and an 'Actions' dropdown menu. A blue banner at the top states: "You are viewing this applicant's application for the job Media Communications Specialist - Boston TEST JOB. Only information related to this application will be shown." The applicant's details are as follows:

<b>Address:</b>	Florida United States	<b>Phone:</b>	+1 617-287-5150
<b>E-mail:</b>	mickey.mouse@magickingdom.com	<b>Number:</b>	14225
<b>Original source:</b>	HigherEd Jobs		

Below the contact information, there is a checkbox for "e-Zines comms hold" which is currently checked (YES).

The **Applications** section shows one application: "Media Communications Specialist - Boston TEST JOB" (#494146 KB), submitted on 28 Mar 2018 via HigherEd Jobs. The status is "Offer incomplete" and "Finalist Interview" (Status changed 25 Mar 2019). An "Actions" dropdown menu is open, listing options: "Add activity", "Change status", "Communicate", "Compile and send", "Offer details", and "Undisclose application".

The **History** section includes filters for "Item" and "Job" (both set to "All"). The history table shows two entries:

Date & time	Item
Today, 6:09pm Gina Chan	Interview 2 Media Communications Specialist - Boston TEST JOB
Tuesday, 18 Dec 2018, 3:19pm Kimberly Burke	Offer, Status: Offer made Media Communications Specialist - Boston TEST JOB

Navigation buttons for "< Previous" and "Done" are located at the bottom of the page.

**Hiring Managers** are permitted to change the **Status** of an applicant. This is a critical point in the applicant review process, since a **Status** change may trigger other actions within the PageUp system. A status change can also happen when viewing all applicants on the Manage Applicants Page.

Permissioned users should only move applicants when the Search Committee has finalized their review and/or the candidates approved by Human Resources (or Provost Office if a Faculty search). **Applicants should not bounce through different statuses.**

Once you make the selection and click on Next, you are taken to the Confirm status change screen. Near the bottom of the page, you will see the Status which the person has been moved to.

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

**Human Resources** will notify applicants not selected for interview. Once applicants are notified, hiring departments will no longer have access to those candidates.



**Confirm status change**

You are about to move **Andy Applicant** to a different status:

From status: Offer proposal - Selected Candidate  
 To status: First Round Interview

Communication template: -- No template --

E-mail: Applicant:  Yes  No

Additional users from job:  Yes  No

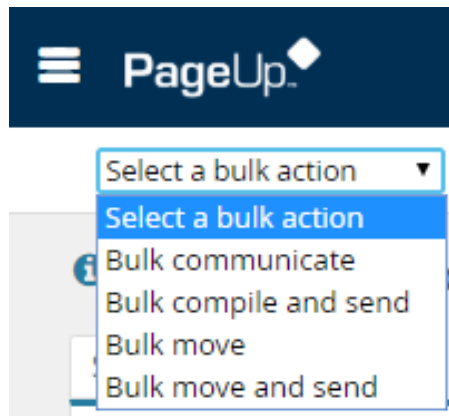
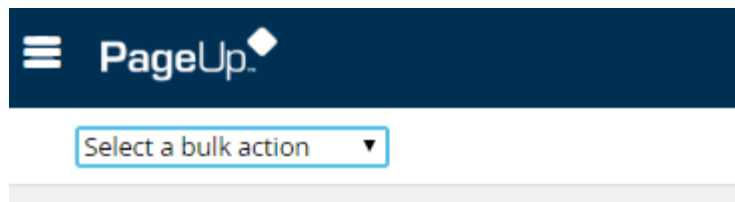
Note

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

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

### Managing applications - Bulk activities

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



### Bulk communicate

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

### Bulk compile and send

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

### Bulk move

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

### Bulk move and send

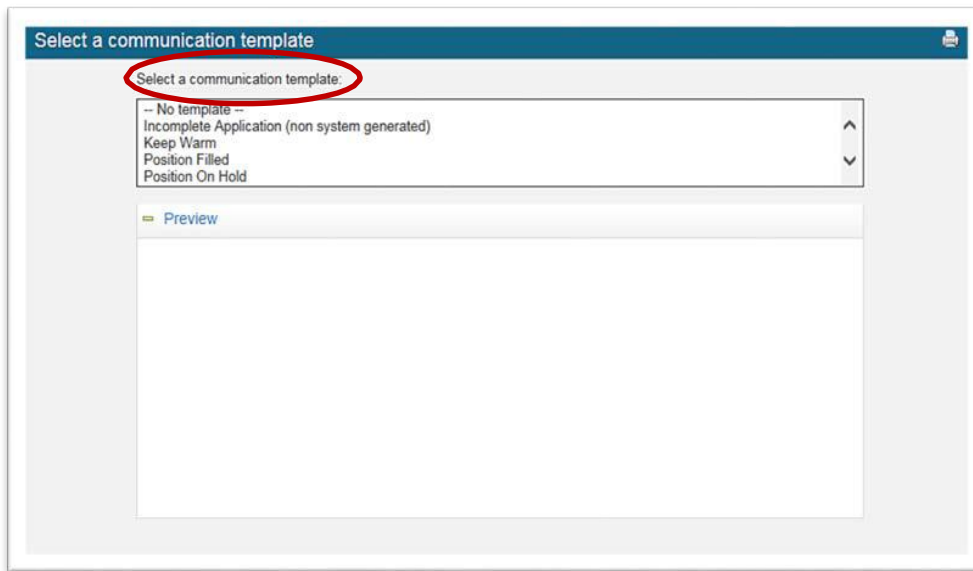
From **Manage applicants**, select a number of applications and click on **Bulk move and send** in the top toolbar. Select the information you wish to send to a user. Once you click **next**, the user will receive an email with URL's containing the details you have compiled. The next page will perform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

## Communicating with candidates

Hiring Manager permissions can select the **Actions** toolbar and then select **Communicate**.



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

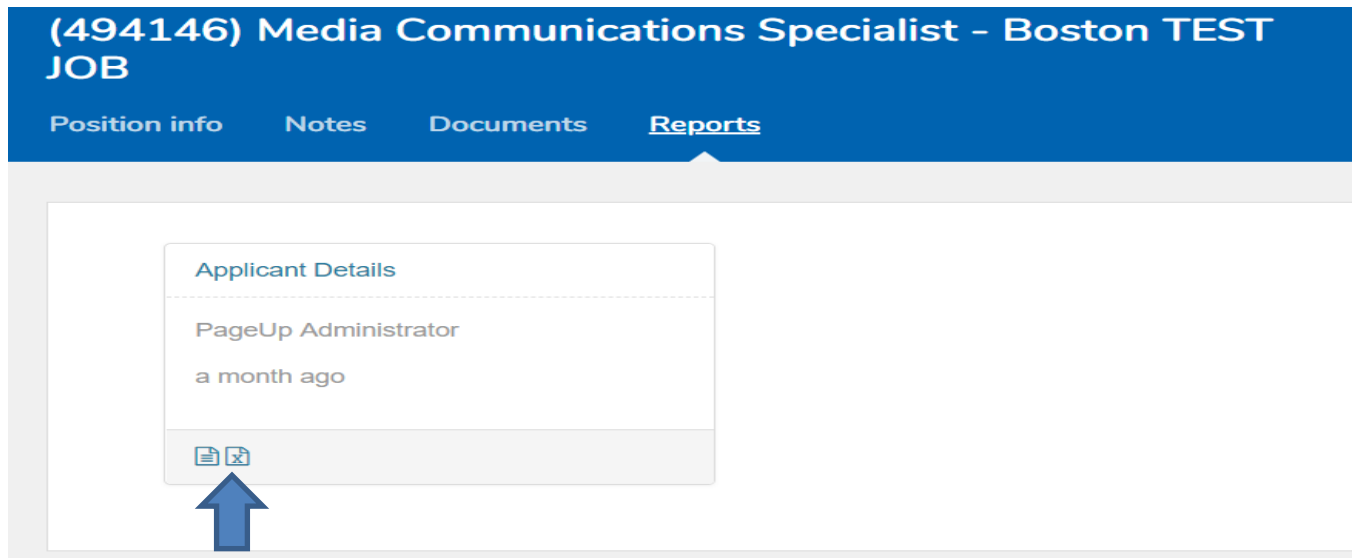


## Submission of candidates selected for interview

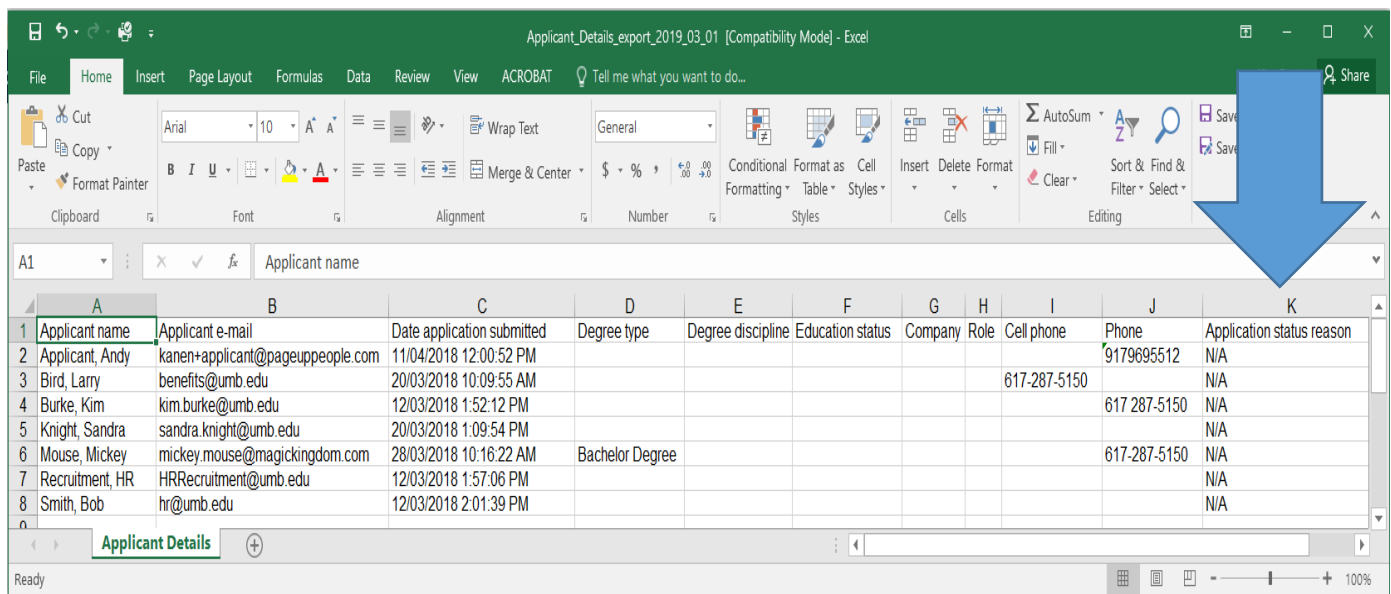
Hiring Managers will download the **Applicant Details** report following their review of candidates and indicate a disposition reason for each applicant under the **Application Status Reason** column. First round candidates will be indicated with **“First Round”**, all other applicants will be indicated as **“Does not meet job requirements”** or **“Other candidates more suitable.”**

Note: These are the only disposition reasons to be listed on the report.

The **Applicant Details** Report can be found on the Reports tab of the requisition.



**Disposition reasons** will be added to the column below on the report, saved, and uploaded.



The completed report will be attached to the **Notes** tab for HR review of the first round candidates. Select your HR Recruitment contact to notify HR.

**For faculty searches:** The Applicant Details Report will be sent directly to the Provost's Office once candidates have been identified for interview and dispositions have been listed for each applicant. The Provost's Office will upload the spreadsheet to PageUp notes for HR Diversity review. HR will notify the academic department and the Provost's Office via the notes upon final approval.

PageUp

Jobs People Recent Items Gina ?

(494146) Media Communications Specialist - Boston TEST JOB

View applications

Position info **Notes** Documents Reports

Add: Select

Select

26 Feb 2019, 10:13am Note

Hold day ed.

26 Feb 2019, 10:13am

Henry here are the questions

Note emailed to: Henry.Paquin@umb.edu

18 Dec 2018, 3:08pm

Hi

This is our PageUp demo.

KB

Henry Paquin

Kimberly Burke

Gina Chan

Edit Delete

Please include a brief note indicating what action is needed by HR and the recipient. An additional user can be selected.

Add note - PageUp - Google Chrome

https://umass.dc4.pageuppeople.com/JobNote/Add?sData=UFUtVjMtuh7ZMV4anOpeSfu7uCovvqySIAOO%2BZdsmTW...

**Add note**

Note:\*

Please review the first round candidates

File: Upload file Dropbox

E-mail this note to:

User: Kimberly Burke

Other e-mail: myself.lastname@umb.edu

Submit Cancel

The document will be available to HR and all users listed on the Requisition.

# (494146) Media Communications Specialist - Boston TEST JOB

[View applications](#)



[Position info](#) [Notes](#) [Documents](#) [Reports](#)

Add:

**21 Mar 2019, 6:43pm**

[This is a test.docx](#)

Please review the first round candidates

**Gina Chan**

[Edit](#) [Delete](#)

## Making an offer

### Application status move

Once you have interviewed your candidates and are ready to make a recommendation for hire, the **Hiring Manager** will be required to change the status of the applicant. First, open the requisition, and then select **View Application**. Click on the **Status** of the applicant you want to extend an offer to and change their status to **Offer Proposal-Selected Candidate**. Click next to continue.

**Change application status**

- Search Committee Review
- First Round Interview
- Finalist Interview
- Offer proposal - Selected Candidate**
- Offer approved
- Offer accepted
- Offer declined
- Offer cancelled
- Offer accepted form complete

Submit Next > Cancel

Click **Yes** to update the **Job status** at the same time you are updating the applicant status.

## Confirm Status Change:

Confirm status change - Google Chrome

https://umass.dc4.pageuppeople.com/v5.3/provider/manageApplicants/changeStatus.asp?sData=UFUtVjMt5mspGzd...

### Confirm status change

You are about to move **Andy Applicant** to a different status:

**From status:** Offer proposal - Selected Candidate  
**To status:** Offer proposal - Selected Candidate

**Guidance information**  
Upon approval of Human Resources, a verbal offer can be extended to the selected candidate.

Communication template: -- No template --

E-mail: Applicant:  Yes  No

Additional users from Job:  Yes  No

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

**Move now** **Cancel**

After clicking **Move Now** the **Offer card** (offer details page) will be displayed. **Do not elect to send an email to the Applicant.**

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

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



## Selected Candidate Offer Card:

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

### Andy Applicant (Andy) [Revision history](#)

**Personal details**

Address: 260 Madison Avenue  
SDuite 8061  
New York, New York  
11238, United States

Phone: 9179695512

E-mail: [kanen+applicant@pageuppeople.com](mailto:kanen+applicant@pageuppeople.com)

Applicant number: 14315

**Job details**

Working Title/  
Posting Title: **Media Communications Specialist - Boston TEST JOB.**

Employment  
type: Staff Full Time

Campus: Univ of Mass Boston

Department: Political Science

Site: -

**Offer details**

Approval status: **Pending**

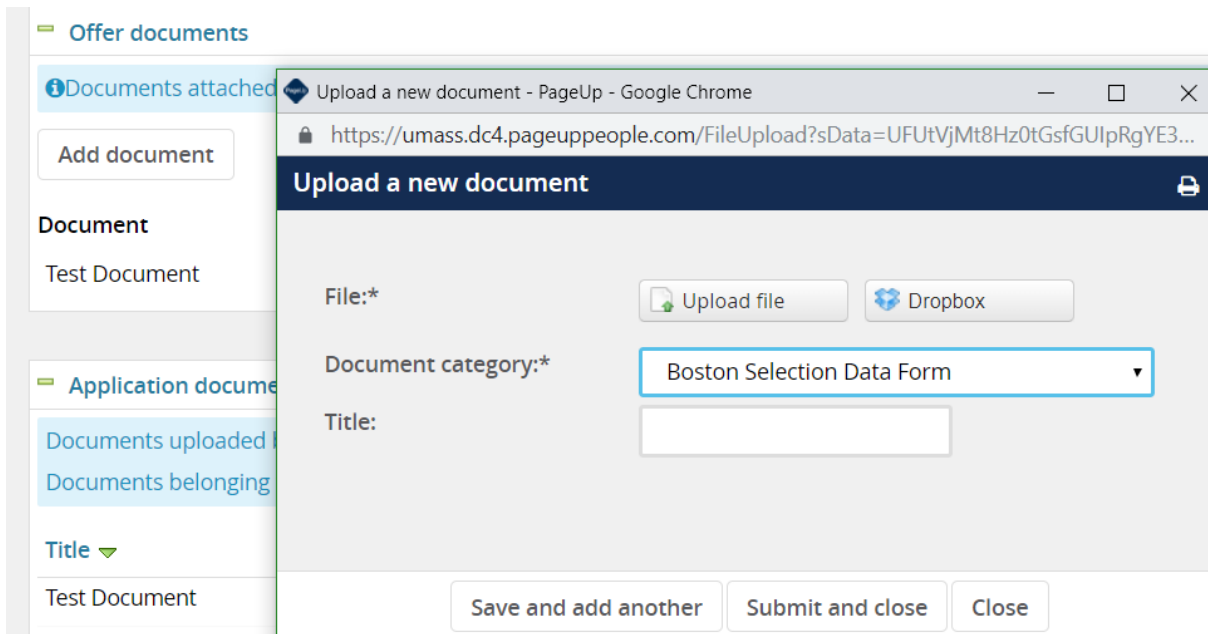
Human  
Resources: Kimberly Burke

Date entered: 11 Jun 2019 6:45 am

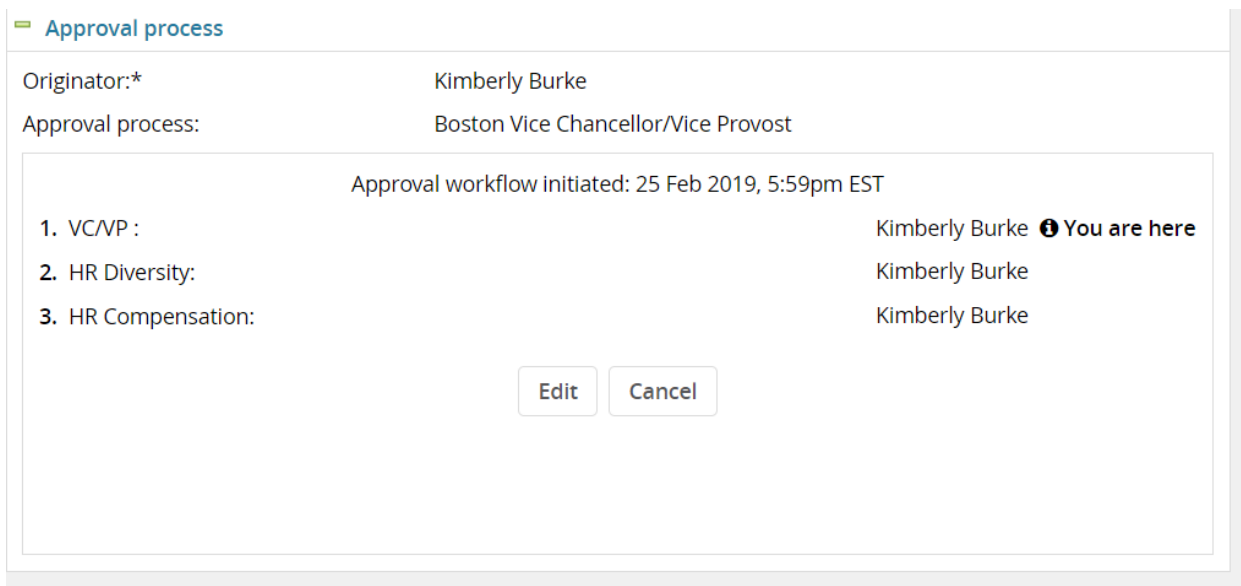
### [Complete offer details](#)

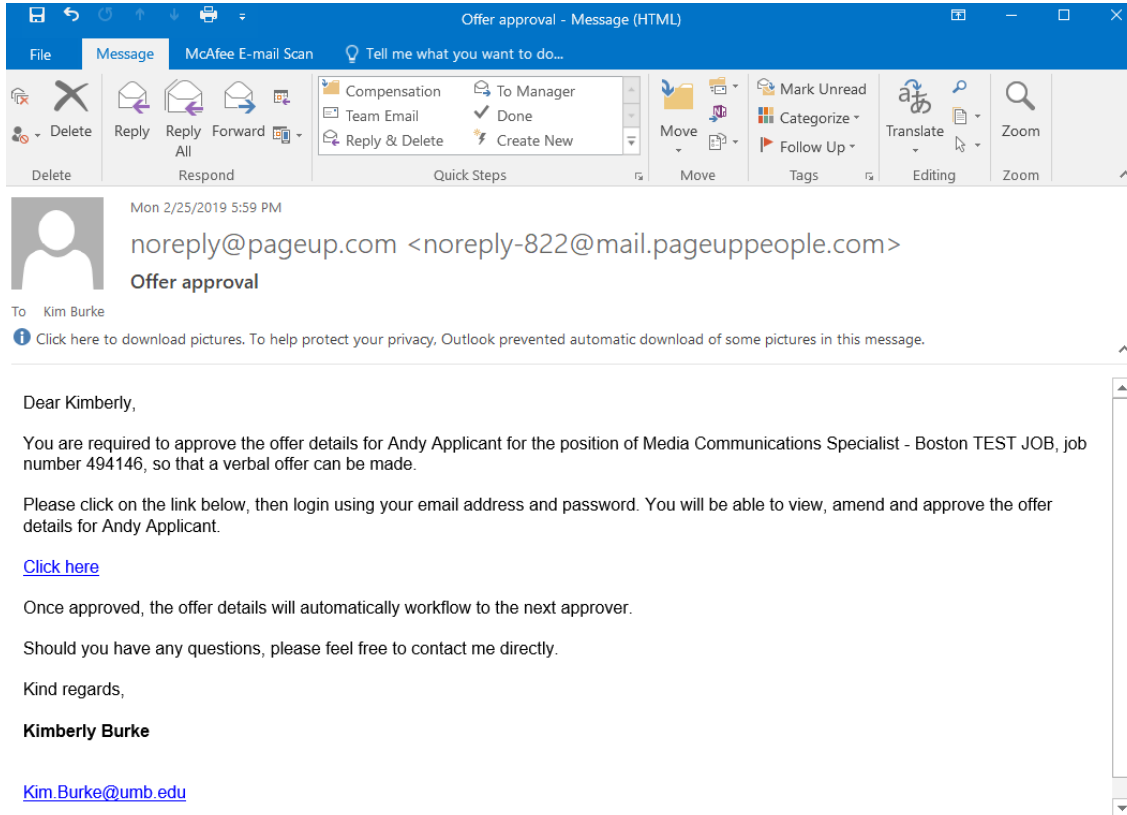
From the **Offer details** page, enter details into all fields ensuring all mandatory fields are completed. The proposed salary must be listed.

**You must attach the Data Selection Form to the Offer Card** indicating the finalists and their reasons for selection or non-selection.



You must then select an **Approval Process**. Enter the appropriate names, if names did not default, and then select **Submit and Close**. This will start the approval process. Human Resources is last in the approval workflow and will be responsible for sending the offer letter out to the candidate for staff searches. Hiring Managers will be notified via the system once the offer details are approved by Human Resources and a verbal offer can be extended.





## Approving offers

### Approving an offer

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

### Declining an offer

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

### Restart an approval process

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

Submit and close

Submit

Remove Offer

Cancel

Approve

Decline

## Closing out a Search

Under limited circumstances, a search can be closed out for lack of a viable candidate. To indicate that you would like to close out the search, add a Note to the requisition and upload the Close Out Search Form.

The screenshot displays the PageUp interface for a job requisition. The top navigation bar includes 'PageUp', 'Jobs', 'People', 'Recent items', and 'Gina'. The main heading is '(494146) Media Communications Specialist - Boston TEST JOB'. Below this, there are tabs for 'Position info', 'Notes', 'Documents', and 'Reports'. A 'View applications' button is visible on the right.

The 'Notes' section shows a list of notes with a dropdown menu open, highlighting 'Note'. The notes include:

- 26 Feb 2019, 10:13am: Henry here are the questions. Note emailed to: Henry.Paquin@umb.edu
- 18 Dec 2018, 3:08pm: Hi. This is our PageUp demo. KB

On the right side, there is a list of names: Henry Paquin, Kimberly Burke, and Gina Chan, with 'Edit Delete' options below.

An 'Add note' modal window is open, showing a text area with the note: 'Candidate declined the offer, please close out the search. We will re-post.' Below the text area, there is a file upload section with 'Close Out Search Form.docx (11 kb)' and a 'Delete' button. There are also fields for 'E-mail this note to:', 'User:' (with 'Krystle Santana' entered), and 'Other e-mail:'.

At the bottom of the modal, there are 'Submit' and 'Cancel' buttons.

## Key Terms and Roles within PageUp

### Key Terms

- **Job Card:** PageUp form used to submit a requisition to recruit
- **Offer Card:** PageUp form used to select a candidate for an offer of employment.
- **Requisition:** Online request to post for a vacant, or soon to be vacant, position.
- **Approval Process:** The sequence of approvers needed to post a vacancy or select a candidate for an offer.
- **Application Status:** The different steps an applicant goes through during the recruitment process.
- **Applicant Card:** Individual application details and history (Hiring Manager and Vice Chancellor permissions).
- **Permission Groups:** Access level assigned to each user; HR assigns permissions in consultation with department needs.
- **Administrative Support/Originator:** Enters requisition on behalf of department/hiring manager; no access to applicants; optional.
- **Hiring Manager:** Will coordinate the full hiring process for the search, including submission of Offer Card, first round candidates, and interview questions; serves as point of contact with HR.
- **Search Committee and Search Chair:** Reviews all applicants and makes recommendations for first round interviews.
- **Vice Chancellors:** Can view all requisitions and applicants within assigned “Teams”; can also submit an Offer Card for selected candidate

### Requisition field roles

#### Hiring Manager (required field):

- On the requisition, this field will always default to the person who is creating the requisition. If the individual creating the requisition is not a true hiring manager for this position, you should replace the name.
- Responsible for day-to-day applicant and search management on a requisition that they are assigned to.
- Most powerful role with most visibility on requisitions. Has the ability to create and submit a requisition, move applicants into the correct application statuses throughout the hiring process. Will see all requisition statuses (open, filled, draft, approved etc). Is able to communicate to applicants via PageUp.
- Can view jobs assigned to them by selecting the jobs link at the top of their dashboard. Can view approvals of the Requisition throughout the job approval process.
- If no search committee, will submit Applicant Details Report of applicant pool via PageUp Notes.
- Only one Hiring Manager can be assigned to a Requisition.

#### Administrative Support/Originator (optional field):

- Individual who is completing the Requisition on behalf of hiring department.
- Will attach approved job description and compensation memo to requisition.
- No access to applicants.
- Will see status of the requisition through approval.

#### Search Committee Chair (optional field):

- Someone who will oversee the applicant review process.
- Only able to see jobs that they are assigned to.

- Search Chair is able to view applicant documents.
- Will be able to view search committee members' feedback.
- Should oversee search committee meetings and make recommendations to Hiring Manager. Will submit Applicant Details Report of applicant pool via PageUp Notes.
- Search Chair may be the Hiring Manager.
- Able to view the original requisition, but cannot edit it.
- Responsible for working with the Hiring manager, Administrative Support/Originator to move an applicant into the correct disposition status.

**Search Committee Member (optional field):**

- Can view applicants and is able to evaluate an applicant based on the selection criteria. Unable to comment on an applicant.
- Only able to see jobs that they are assigned to.
- Able to view the original requisition, but cannot edit it.

[Other PageUp Roles](#)

**Vice Chancellor/Vice Provost:**

- Senior administrators will have access to job requisitions and applicants for multiple Teams (departments) within their division.
- Access to applicants similar to Hiring Manager. Has ability to change application statuses and initiate or approve an Offer Card.
- Can approve a requisition.

**OBFP:**

- Office of Budget and Financial Planning access to review and approve requisitions.
- No Access to applicants

[Offer Card field roles](#)

**Reports to Manager (required field by HR):**

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

**Originator (required field):**

Individual completing the Offer Card, typically the Hiring Manager.