

How to Guide:

CLASSIFIED REQUEST TO FILL

Interview Exchange
Electronic Forms Module



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Login to Interview Exchange

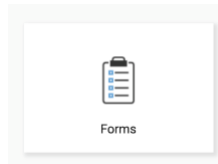
1.) [Click here](#) to sign into Hirezon/Interview Exchange using single sign on. If you do use the [old link](#) it will still direct you to the single sign on screen once you put in your long email address (first.lastname@oswego.edu).

2.) You will then enter your Laker NetID and password, click Login and it will direct you to the main Hirezon/Interview Exchange page.

**For department Hirezon/Interview Exchange accounts you will continue to login the same way you currently do using the [old link](#) and your Interview Exchange department email and associated password.

Note: If you have a non-Oswego email address you will continue to login with your individual Hirezon/Interview Exchange account credentials (email address and associated password) through [this link](#).

3.) Click on this icon:



4.) This will bring you to your main Dashboard.

User Dashboard 🏠

Tab: Created by me

Incomplete Forms: Forms created by you and have not yet been sent for approval or completed.

Completed Forms: Forms created by you which are now completed.

Published Forms: Forms created by you which are pending task completion or routing review and approval.

Waiting for Form Approval: Forms created by you and waiting for approval from others.

Waiting for Task Approval: Forms created by you and have tasks waiting for approval from others.

Guest Reviews: User can view forms in read-only mode with no action required by them.

0 Created by me 0 Assigned to me
2 Guest Reviews + Start New Form

Incomplete Forms

ID	Title	Originator	Template	Updated
No Records Found				

Completed Forms

ID	Title	Originator	Template	Updated
No Records Found				

Published Forms

ID	Title	Originator	Template	Updated
No Records Found				

Waiting for Form Approval

ID	Title	Originator	Template	Updated
No Records Found				

Waiting for Task Approval

ID	Title	Originator	Template	Updated
No Records Found				

Guest Reviews

ID	Title	Originator	Template	Updated
No Records Found				

Tab: Assigned to me

Task Assigned to Me: Forms created by other users and tasks assigned to you for completion.

Form Approval: Forms created by other users and are pending review and approval by you.

Task Approval: Forms created by other users with tasks pending review and approval by you.

Guest Reviews: Forms available to you in read-only mode with no action required.

Note: User can view all completed Forms/Tasks by clicking the Show Completed checkboxes.

0 Created by me 0 Assigned to me 2 Guest Reviews [+ Start New Form](#)

Tasks Assigned to Me Show Completed

ID	Title	Originator	Template	Updated
10522	Liz Employee	HR Super Admin User	Staff Development	07/22/2019

1 Records from 1 to 1 of 1

Waiting for Form Approval Show Completed

ID	Title	Originator	Template	Updated
No Records Found				

Waiting for Task Approval Show Completed

ID	Title	Originator	Template	Updated
No Records Found				

Guest Reviews Show Completed

ID	Title	Originator	Template	Updated
11087	Chemistry Instructor	HR Super Admin User	Position Management	05/29/2018
10123	HR Assistant	HR Super Admin User	Request to Fill Demo	04/22/2018

1 Records from 1 to 2 of 2

How to Start Form

+Start Form– Look for this icon in the top right corner of your screen, click this button. It will bring you to this screen:

Hirezon | **EXchange** SUNY Oswego [Dashboard](#) Leah Holmes [Notifications \(36\)](#) [Help](#) [Instructions](#) [Logout](#)

Start New Form

Department:

Category:

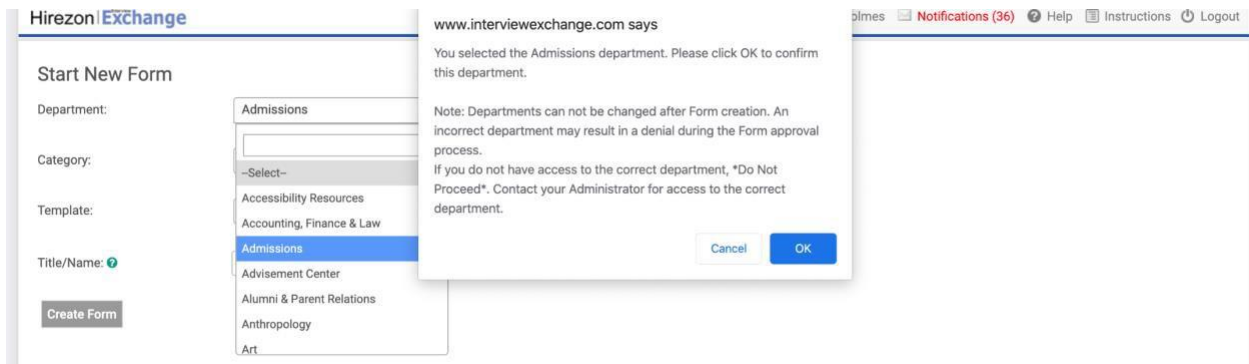
Template:

Title/Name:

[Create Form](#)

Steps:

- 1.) Select the department the position is located.



Note: Each user (creator of form) only has access to the department they currently work in or will need to request access to another department (if applicable) by contacting the Human Resources Office at hr@oswego.edu.

- 2.) Select the category: Recruitment.
- 3.) Select the template: RTF-Classified.
- 4.) Title/Name: Enter the title of the position that needs to be filled.

Click: **Create Form**

This will be the next screen:

- 6.) Click: **Request to Fill Classified Service Position**- it will bring you to this screen:



Request to Fill Classified Service Position

Position Information	
*Classified Title: --Select--	*Days: <input type="text"/>
*Shift: <input type="text"/>	*Department: Accessibility Resources
*Note: If more than one account should be charged, please indicate percentage for each. Account 1: (%): <input type="text"/>	*Acct (1) to be charged (E.g. 860603-00): <input type="text"/>
Account 2: (%): <input type="text"/>	Acct (2) to be charged (E.g. 860603-00): <input type="text"/>
Account 3: (%): <input type="text"/>	Acct (3) to be charged (E.g. 860603-00): <input type="text"/>
*Type of Position: --Select--	*Name of previous incumbent and title, if any: (please put N/A if not applicable) <input type="text"/>
Save & Submit	

7.) Complete the Request to Fill Classified Service Position form with all the required and applicable information. The last section of the form is the Employment Action Justification which is required for all Classified Request to Fills. Click Save & Submit. Then click Continue.

Employment Action Justification

[Click here](#) for Employment Action Justification guidelines.

*Please select the SUNY criteria that justifies this position: --Select--	SUNY criteria description <input type="text"/>
*Please include an explanation as to how this action specifically meets the SUNY criteria selected above? <input type="text"/>	
*Describe the critical need for this action, including but not limited to, the impact on the College if this action is not taken? <input type="text"/>	
*Describe all other possible alternatives that have been explored for fulfilling these responsibilities (reassignment of work to existing staff within your department, division or another campus area, reorganization, reclassification of position, decrease of FTE, eliminate duties, etc.): <input type="text"/>	
Save & Submit	

8.) You will be back to this screen:

Cleaner-TEST Guests All Tasks

Form ID: 46400

Request to Fill Position - Classified Task Routing Actions

Test Oswego

* Request to Fill Position - Classified
 Request to Fill Classified Service Position v82720

* ATTACH POSITION DESCRIPTION

Test.docx
 Optional File comment (description, etc.)

Save

* ATTACH ORGANIZATION CHART

Test.docx
 Optional File comment (description, etc.)

Save


Discussions Close

Start New Discussion

Send for Next Action

9.) You will now see a check mark next to the form showing you that task is complete. The next required task is uploading the Position Description. Click Choose File and upload your attachment. If you would like to enter a comment about the document, you can do so in the box below and click **Save**.

10.) The next required task is the Organization Chart. Click Choose File and upload your attachment. If you would like to enter a comment about the document, you can do so in the box below and click **Save**.

11.) After you have uploaded all the appropriate documents. Click on the “Task Routing” in the top right corner.  Task Routing This is where you will set up the task routing for the appropriate approvals. Click on the pencil icon on the right:

Task Routing			
Approver Title	User	Status	Actions
Chair/Supervisor			
Dean/Administrative Officer			
Vice President			
Finance / Budget	Finance Office	Not Initiated	
VP of Admin & Finance	Division of Administration...	Not Initiated	
	Kelsey L Truax	Not Initiated	
Human Resources	Human Resources	Not Initiated	

Instructions: Please allow 5 business days for processing before inquiring about the status of this request. Thank you.

It will drop down to this screen:



The screenshot shows a task routing form with the following elements:

- Approver Title:** A dropdown menu with 'Chair/Supervisor' selected.
- User:** An empty text input field.
- Permission:** An empty text input field.
- Instructions (optional):** A large text area for entering comments or instructions.
- Buttons:** 'Save Routing' and 'Cancel' buttons at the bottom.

Click in the box under “User” and type in the individual’s name or if the approver is a certain department type the department name. The email should pop up and you click on it to autofill into the box. Once selected you have the option to write in any instructions or comments in the box then click **Save Routing**.

Approver Title Email Guidance:

Chair/Supervisor: Department Chair or Supervisor. Depending on your department’s internal process enter either the individual’s email or general department email.

Dean/Administrative Officer: Dean, Director of department/area or Administrative Officer. Depending on the department/areas internal process enter either the individual’s email or general department email. If Dean’s Office, please use general email:

School of Business: business@oswego.edu

College of Liberal Arts & Sciences: clas@oswego.edu

School of Communication Media & the Arts: scma@oswego.edu

School of Education: educate@oswego.edu

Vice President: Depending on the division you are in will determine the general email you enter:

Academic Affairs: provost@oswego.edu

Student Affairs: studentaffairs@oswego.edu

Alumni & Development: develop@oswego.edu

Administration & Finance: adminfinance@oswego.edu

Finance Office: The Finance Office email is hard-coded into the task routing so you do not need to enter anything.

VP of Administration & Finance: The VP of Admin & Finance email is hard-coded into the task routing so you do not need to enter anything.

Human Resources: The Human Resources Office email is hard-coded into the task routing so you do not need to enter anything.

Note: For most departments, you will be using their general emails instead of an individual's name. This will allow for all forms in each department to be located in the same dashboard and for more than one individual in a department to have access to these forms and to create them if needed.

12.) Once the Task Routing is setup and complete, exit out. You will return to this screen:

The screenshot shows a web interface for a form titled "Request to Fill Position - Classified". At the top left, it says "Cleaner-TEST" and "Form ID: 46400". At the top right, there is a "Guests" dropdown menu set to "All Tasks". The form itself has a header with a blue arrow icon, the title "Request to Fill Position - Classified", and a user icon for "Test Oswego". Below the header, there are two main sections: "ATTACH POSITION DESCRIPTION" and "ATTACH ORGANIZATION CHART". Each section has a "Test.docx" file icon, a text input field for an "Optional File comment (description, etc.)", and a "Save" button. At the bottom of the form, there is a "Discussions" section with a "Start New Discussion" button. Below the form, there is a "Send for Next Action" button.

Click on **Send for Next Action**. This submits the form to the first approver.

Task Routing Features

Check Status:

1.) As the creator of the form and any approver of a form you can view the task routing at any time and check to see where it is in the approval process.

Creator Steps:

- a.) Go back to your Dashboard screen, go to the Waiting for Task Approval section. This is where your forms will be when still in the task routing approval process.
- b.) Find the form you want to review. Click on the box with pencil icon to the left of the form title. It will bring you back to this screen:

Form ID: 46400

Request to Fill Position - Classified

Test Oswego

- Request to Fill Position - Classified
- Request to Fill Classified Service Position v82720

ATTACH POSITION DESCRIPTION

Test.docx

Optional File comment (description, etc.)

Save

ATTACH ORGANIZATION CHART

Test.docx

Optional File comment (description, etc.)

Save

Discussions

Start New Discussion

Task Routing

Actions

Send for Next Action

- c.) Click on Task Routing in the upper right corner. This will bring you to the task routing screen and you can see all approvers, the date and time the form was approved and what approver the form is sitting with.

**Note: Once your request arrives in Human Resources, please allow 5 business days for processing before inquiring about the status of this request.*

Approver Steps:

- a.) Go back to your Dashboard screen, click on the Show Completed box in the Waiting for Task Approval section. Once you click on that box, the section will be renamed to Completed Task Approval and all forms will be listed that you have approved.
- b.) Find the form you want to review. Click on the magnifying glass on the left of the form title.
- c.) This will bring the task routing screen up to show you all of the approvers, the date and time the form was approved and what approver the form is sitting with.

Friendly Reminder:

2.) As the creator of the form you are able to send a “reminder” to an approver within the task routing. Note: This feature can only be used once within a 24 hour time-period.

Steps:

- a.) Go back to your Dashboard screen, find the form you want to review within the Waiting for Task Approval section.
- b.) Click on the box with the pencil icon on the left of the form title.
- c.) Click on Task Routing icon in the top right of your screen.
- d.) This will bring you to the Task Routing screen. You can view what approver the form is sitting with.
- e.) To send a friendly reminder, click on the bell icon next to the approver’s name under “Actions.” This will automatically send an email to the approver to review this specific form.

**Note: Please be respectful with this feature and only send reminders when absolutely necessary.*

Comments Box:

3.) Within the task routing the creator and any approvers may write a comment when approving/denying a form. This feature allows us to communicate certain information to everyone within the task routing that may be important to know and document.

**Note: These comments cannot be deleted and will be a permanent record with the form.*

Additional Approver:

5.) If there is a RTF that requires an additional approver that is outside of the normal task routing approvers the following process should be followed:

Steps:

- a.) The creator of the form should indicate in the comments box when initially sending the RTF that such “department/individual” must be an additional approver.
- b.) Once the form gets to the Finance Office, they will re-route the RTF to the specified department/individual for approval.
- c.) The approval/denial process will be the same. This department/individual will receive an email to approve/deny. Once they complete the task the RTF will continue through the set task routing approvers.

How to Review/Approve Form


As an approver within the task routing process, you will receive an email to review and either approve or deny a form.


Steps:


- 1.) You will receive an automated general email requesting you to review the form.
- 2.) Login into your Interview Exchange account and go to your Dashboard. Click the tab on the top: Assigned to Me.



3.) The forms that are requiring your review and approval/denial will be in the section titled Waiting for Task Approval:



Waiting for Task Approval  Show Completed

ID	Title	Originator	Template	Updated
 43479	Cleaner-TEST	Leah Holmes	RTF - Classified	08/07/2020

4.) Click on the box with the pencil icon next to the form and it will bring you to this screen: 


Task Approvals on Cleaner-TEST


Form ID: 46400
 Please review the tasks below and click Approve or Deny.

 Request to Fill Position - Classified  Task Routing


Test Oswego

* Request to Fill Position - Classified
 Request to Fill Classified Service Position v82720

* ATTACH POSITION DESCRIPTION
 Test.docx

* ATTACH ORGANIZATION CHART
 Test.docx

Discussions C X

 Start New Discussion

Please enter comments here.

Approve Deny

[Return to Dashboard](#)

5.) Click on **Request to Fill Classified Service Position** and review the information on the form. When you are finished reviewing click the X in the top right to exit out of the form. It will bring you back to the screen above.

**Note: All approvers have the ability to edit the form if necessary.*

6.) Next, you can review the uploaded documents (position description and organization chart).

7.) You then have the option to enter any comments if you'd like and click Approve or Deny.

**Note: As a reminder the comments and discussion box available to communicate with the creator and all approvers cannot be deleted and will become a permanent record with this appointment.*

8.) Once you click approve, an automatic email will be sent to the next approver within the task routing.

Denied Form Process

1.) If an approver within the task routing must deny a form, they have the option by clicking the deny button instead of the approve button when it gets to them in the process.

2.) That approver will have to put in a comment before submitting. If it is something that can be edited on the form, please indicate in the comments box so the creator can edit and resubmit the form.

3.) If a form is denied, only the creator will receive an email letting them know the form was denied. Anyone within the approval task routing process will still be able to see this form within their dashboard and if they click on the magnifying glass to view- they will see a big red X in the top left corner to show the form was denied and with the comments the approver who denied entered.

4.) If the form can be edited and resubmitted, the creator must:

Steps:

a.) Click on the box with pencil on the left of the form.

b.) It will bring you to this screen:

The screenshot shows a web interface for a 'Request to Fill Position - Classified' form. At the top left, it says 'Cleaner-TEST' and 'Form ID: 46400'. In the top right, there are 'Guests' and 'All Tasks' dropdown menus. The main form area has a title bar with 'Request to Fill Position - Classified' and a pencil icon. Below the title bar, there are two sections for attachments: 'ATTACH POSITION DESCRIPTION' and 'ATTACH ORGANIZATION CHART'. Each section has a file upload icon, a filename 'Test.docx', and a text box for 'Optional File comment (description, etc.)' with a 'Save' button below it. At the bottom of the form, there is a 'Discussions' section with a 'Start New Discussion' button. A 'Send for Next Action' button is located at the bottom center of the page.

c.) Click on the ...Actions drop down in the top right, and click “Mark as Incomplete.”

- d.) Click on the same ...Actions drop down in the top right, and this time click “Republish.”
- e.) You will see the red comment stating to complete the tasks. Click on the [Request to Fill Classified Service Position](#).
- f.) This will open up the form you submitted, you can then make edits. Click Save and Submit. Then next screen, click Continue.
- g.) If the task routing is the same, you can click [Send for Next Action](#). If any of the approvers in the task routing need to be changed before you submit, you can make changes by clicking on Task Routing in the top right to edit.
- h.) This will email the first approver again for this form and through the approval process.

5.) If the form was denied for other reasons that cannot be edited the creator must:

Steps:

- a.) Forward the automatic denial email they received from Interview Exchange to everyone who already approved the form and HR.
- b.) HR will then “close out” the form.

Completed Forms

Once a form has been approved by everyone in the task routing process the form is considered complete and ready to process.

If you created a form or were an approver of a form, you will see all of those forms within your Dashboard.

See the steps below on where to find all the completed forms depending on if you were the creator of the form or an approver.

If you were the creator of the form, you will first receive an automatic email stating the form you submitted is complete:



To find the completed forms:

Steps:

- a.) Login to your Interview Exchange account and go to your Dashboard.
- b.) Click on the Created by me tab at the top:



- c.) Then look in the Completed Forms section in the top right of your screen.
- d.) You will be able to view any of these forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:



- e.) You have the option to download into a PDF in the top right corner so you can print or save each completed/approved form.

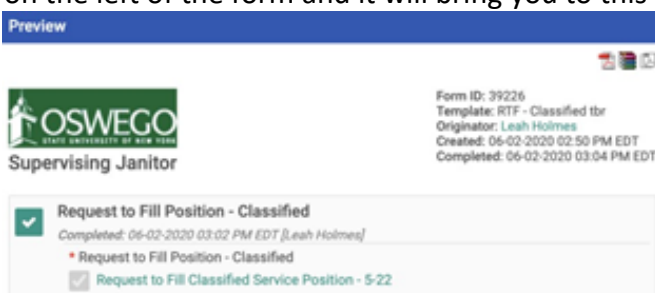
If you were an approver of the form:

Steps:

- a.) Login to your Interview Exchange account and go to your Dashboard.
- b.) Click on the Assigned to me tab at the top of your screen:



- c.) Look at the Waiting for Task Approval section- find the Show Completed box and click on it.
- d.) The Show Completed box has a blue check mark and the section is now named Completed Task Approval.
- e.) You will be able to view any of these forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:



- f.) You have the option to download into a PDF in the top right corner so you can print or save each completed/approved form.