

How to Guide:

UNCLASSIFIED REQUEST TO FILL

Interview Exchange
Electronic Forms Module



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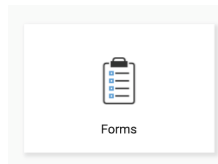
Login to Interview Exchange

- 1.) [Click here](#) to sign into Hirezon/Interview Exchange using single sign on.
- 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 login using the same login [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 |
|----|-------|------------|----------|---------|
|----|-------|------------|----------|---------|

Guest Reviews

| ID | Title | Originator | Template | Updated |
|----|-------|------------|----------|---------|
|----|-------|------------|----------|---------|

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 | | | | |

1 No Records Found

Waiting for Task Approval Show Completed

| ID | Title | Originator | Template | Updated |
|------------------|-------|------------|----------|---------|
| No Records Found | | | | |

1 No Records Found

Guest Reviews

| 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:

--Select--

Category:

Template:

Title/Name: ?

Create Form

Steps:

1.) Select the department the search will be conducted for.

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-Unclassified.

4.) Title/Name: Enter the title of the position the search will be conducted for.

Click: **Create Form**

This will be the next screen:

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

Unclassified Request To Fill Position

Unclassified Request To Fill Position

Position Information

*Position Request:
--Select--

If Other, please specify:

*Department:
Accessibility Resources

*Department Chair/Division Director/Manager:

*Account #

*Proposed Salary Range (\$):
\$

*SUNY Title: Please click [here](#) for Unclassified Titles

Local Title (if different):

Former Incumbent:

Former Incumbent Termination Date (Month/Year)

Reason for leaving:
☐ Resigned ☐ Retired

*Employment Type:
--Select--

*Appointment Type:
--Select--

Save & Submit

7.) Complete the Unclassified Request To Fill Position form with all of the required and applicable information. Click Save & Submit. Then click Continue.

Note: The Employment Action Justification section is required for all Unclassified Request to Fills.

8.) You will be back to this screen:

Assistant Professor-TEST

Form ID: 135282

Request to Fill

Test Oswego

* Request to Fill

☐ Unclassified Request To Fill Position

Organizational Chart

Instructions:
Please attach your departments org chart.

No file chosen

Optional File comment (description, etc.)

Save

* Position Advertisement

Instructions:
[Click here](#) to download the Position Advertisement document. Upload completed Position Advertisement below.

No file chosen

Optional File comment (description, etc.)

Save


Discussions












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 your department's organization chart in the Choose File drop box. If you would like to enter a comment about the document, you can do so in the box below and click [Save](#).

Note: If your department does not currently have an organizational chart please provide a listing of all staff within the department/division/office this position is in.

10.) Next, you will download the Position Advertisement document. Fill in where appropriate (fields highlighted in yellow). Save the document and upload it into the drop box. This will be your long ad that will be posted by Human Resources.

11.) Click on "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 | |
| Dept Chair/Supervisor |  | |  | |
| Chief Diversity & Inclusion Officer |  Kendra Cadogan | Not Initiated | | |
| Dean/Director/Administrative Officer |  | |  | |
| Provost/Vice President |  | |  | |
| Finance Office |  Finance Office | Not Initiated | | |
| VP of Admin & Finance |  Angela M Galvin | Not Initiated | | |
| |  Division of Administration... | Not Initiated | | |
| Human Resources |  Human Resources | Not Initiated | | |

It will drop down to this screen:

Approver Title: 

User:

Permission: 

Dept Chair/Supervisor



Instructions (optional)

Save Routing

Cancel

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](#).

Note: Do not enter the employee/department email-it will not pop up. It must be a name then the email will pop up.

Approver Title Email Guidance:

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

Chief Diversity & Inclusion Officer: The Chief Diversity & Inclusion Officer email is hard-coded into the task routing so you do not need to enter anything.

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

College of Business and Entrepreneurship: cobe@oswego.edu

College of Liberal Arts, Sciences and Engineering clase@oswego.edu

College of Communication, Media & the Arts: cma@oswego.edu

College of Education, Health and Human Services: educate@oswego.edu

Provost/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

Research Foundation: orsp@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:

Assistant Professor-TEST 👤 Guests All Tasks

Form ID: 135282

➔ Request to Fill
👤 Test Oswego

Task Routing ⚙️ Actions

* Request to Fill
☐ Unclassified Request To Fill Position

Organizational Chart

Instructions:
Please attach your departments org chart.

No file chosen

Optional File comment (description, etc.)

Save

* Position Advertisement
Instructions:
[Click here](#) to download the Position Advertisement document. Upload completed Position Advertisement below.

No file chosen

Optional File comment (description, etc.)

Save

Discussions

C X

Start New Discussion

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

Task Routing Features

Check Status:

Both form creators and form approvers can view the task routing and check to see where the form is in the approval process at any time.

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:

Assistant Professor-TEST 👤 Guests All Tasks

Form ID: 56421

➔ Request to Fill
👤 Test Oswego

Task Routing ⚙️ Actions

* Request to Fill
☒ Unclassified Request To Fill Position v12/16/20

Organizational Chart

Instructions:
Please attach your departments org chart.

No file chosen

Optional File comment (description, etc.)

Save

Discussions

C X

Start New Discussion

- 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 currently sitting with.


Approver Steps:

- a.) Go back to your Dashboard screen (Assigned to me), 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:

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:

- 1.) Go back to your Dashboard screen, find the form you want to review within the Waiting for Task Approval section.
- 2.) Click on the box with the pencil icon on the left of the form title.
- 3.) Click on  Task Routing icon in the top right of your screen.
- 4.) This will bring you to the Task Routing screen. You can view what approver the form is sitting with.
 - a. 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.

Finance Office

 Finance Office

In Progress [05-05-2020 01:10 PM EDT]

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

Comments Box:

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.

Example: “Please note this is grant funded....etc.”

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

See Changes Made to Form:

If a change was made to a form, the creator can see what the change was within the task routing. If you click on the box with the pencil next to the form, then click on “Tasking Routing” in the top right corner. It will bring you to the task routing screen and you will see a clock with an arrow around it next to the approver who made the change- click on that icon and you will see the changes made.

Human Resources

 Human Resources

Complete [05-01-2020 08:41 AM EDT]



Additional Approver:

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

Steps:

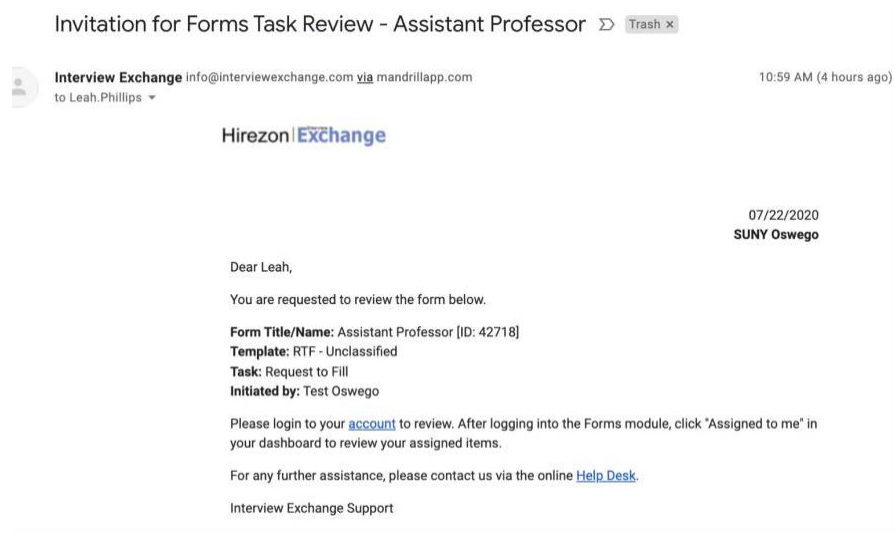
- 1.) The creator of the form should indicate in the comments box when initially sending the RTF that such “department/individual” must be an additional approver.
- 2.) Once the form gets to the Finance Office, they will re-route the RTF to the specified department/individual for approval.
- 3.) The 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. Receive 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 |
|---|---------------------|-------------|--------------------|------------|
|  42718 | Assistant Professor | Test Oswego | RTF - Unclassified | 07/22/2020 |

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

Task Approvals on Assistant Professor-TEST

Form ID: 56421
☐ Please review the tasks below and click Approve or Deny.

Request to Fill

Test Oswego

Task Routing

* Request to Fill
☐ Unclassified Request To Fill Position v12/16/20

Organizational Chart
 Instructions:
 Please attach your departments org chart.

No file chosen

Optional File comment (description, etc.)

Discussions

Please enter comments here.

5.) Click on [Unclassified Request To Fill 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 option to edit the form if necessary.*

6.) 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 RTF.*

7.) 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, as well as 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:

Form ID: 56421

- 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 **Unclassified Request To Fill 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.

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

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

See the steps below on where to find all of 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:

Form Completed - Assistant Professor [RTF - Unclassified] Inbox x

Interview Exchange info@interviewexchange.com via mandrillapp.com
to me ▾

3:59 PM (0 minutes ago)

Hirezon | **Exchange**

07/22/2020
SUNY Oswego

Dear Test,

The form below has been completed.

Form Title/Name: Assistant Professor [ID: 42718]

Template: RTF - Unclassified

Initiated by: Test Oswego

Please login to your [account](#) to invite any guest for review.

For any further assistance, please contact us via the online [Help Desk](#).

Interview Exchange Support

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:

Completed Forms ?

| | ID | Title | Originator | Template | Updated |
|---|-------|---------------------|-------------|--------------------|------------|
|   | 42718 | Assistant Professor | Test Oswego | RTF - Unclassified | 07/22/2020 |

- d.) You will be able to view any of the forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:

Preview

**Assistant Professor-TEST**

Form ID: 56421
Template: RTF - Unclassified v 12/16/20 Testing
Originator: Test Oswego
Created: 01-18-2021 10:33 AM EST
Completed: 01-18-2021 10:47 AM EST

☒ Request to Fill

Completed: 01-18-2021 10:47 AM EST [Test Oswego]

☒ Request to Fill

☒ Unclassified Request To Fill Position v12/16/20

Organizational Chart

Instructions:
Please attach your departments org chart.

Comment: No Comment

Task Routing

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



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, the section will now be named Completed Task Approval and the Show Completed box has a blue check mark:

Completed Task Approval   Show Completed

| ID | Title | Originator | Template | Updated |
|---|---------------------|-------------|--------------------|------------|
|  42718 | Assistant Professor | Test Oswego | RTF - Unclassified | 07/22/2020 |


- d.) You will be able to view any of the forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:

View 




Assistant Professor-TEST

Form ID: 56421
 Template: RTF - Unclassified v 12/16/20 Testing
 Originator: Test Oswego
 Created: 01-18-2021 10:33 AM EST
 Completed: 01-18-2021 10:47 AM EST

 **Request to Fill**
 Completed: 01-18-2021 10:47 AM EST [Test Oswego]

* Request to Fill

 Unclassified Request To Fill Position v12/16/20

Organizational Chart

Instructions:
Please attach your departments org chart.

Comment: No Comment

Task Routing

- f.) Click on the **Unclassified Request To Fill Position**. You have the option to download into a PDF in the top right corner so you can print or save each completed/approved RTF.