



# Guide to EngSoc Dash

The Engineering Society of Queen's University Dashboard

Last updated: March 9, 2019 by Kodie Becker

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## Introduction

Released in July 2018, the Engineering Society Dashboard (known as EngSoc Dash) is a centralized database and management software used to organize and simplify the hiring process and allow for better tracking of the history of positions within the Engineering Society.

## First Login

After logging in with your personal Queen’s NetID and upon arrival to the site, you will be greeted with the main page which has a summary of all activities on the site. If it’s your first-time logging on, you will be prompted to complete your profile. This is important as it helps with identification and contact in relation to applications, interviews, and positions.

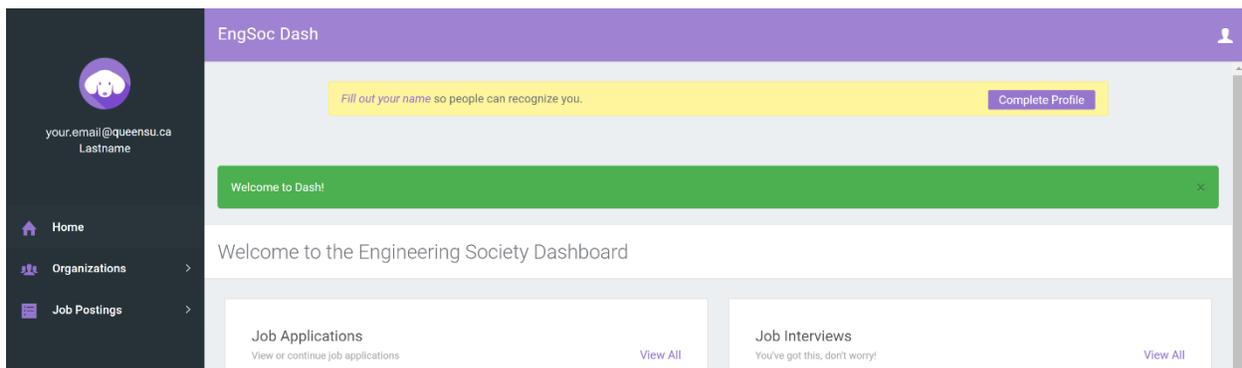


Figure 1: Prompt on the home page of Dash to complete your profile.

**Note:** If your profile is not filled out, you will show up as “Lastname” on all pages and for all intents and purposes be unidentifiable.

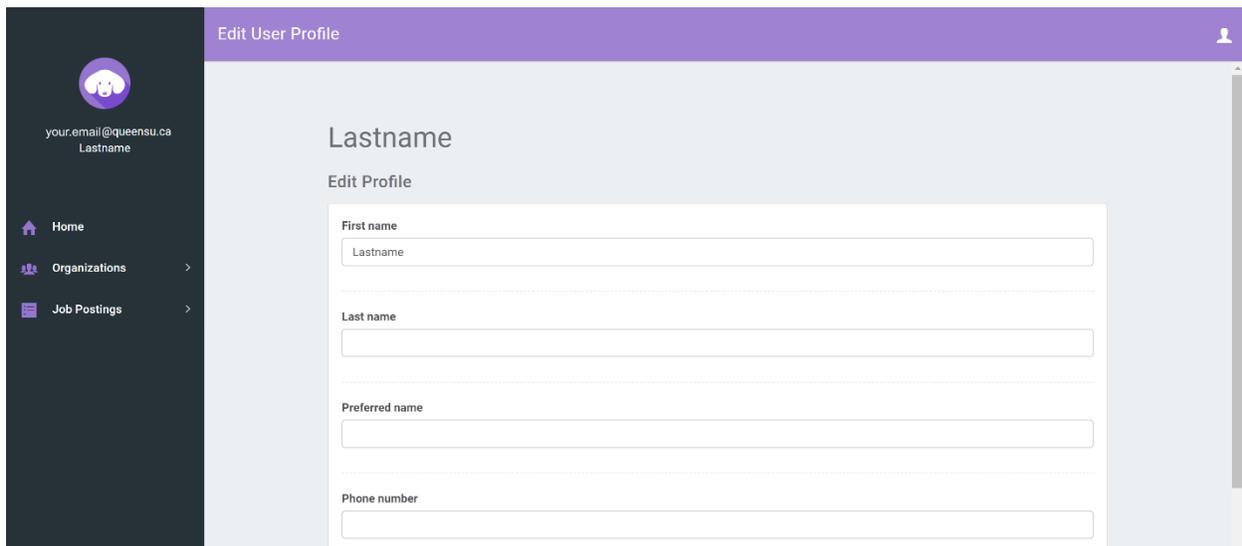


Figure 2: Profile editing page. Fill out as much information as you see relevant.

## Home Page

On the home page, you'll see any applications you have started or completed, any jobs that are currently hiring, and interview dates and times. At the bottom are quick links to navigate to organizations, job postings, and your profile. These same pages can be accessed using the left side bar. To access your profile and edit your information from any page, click the head in the top right corner.

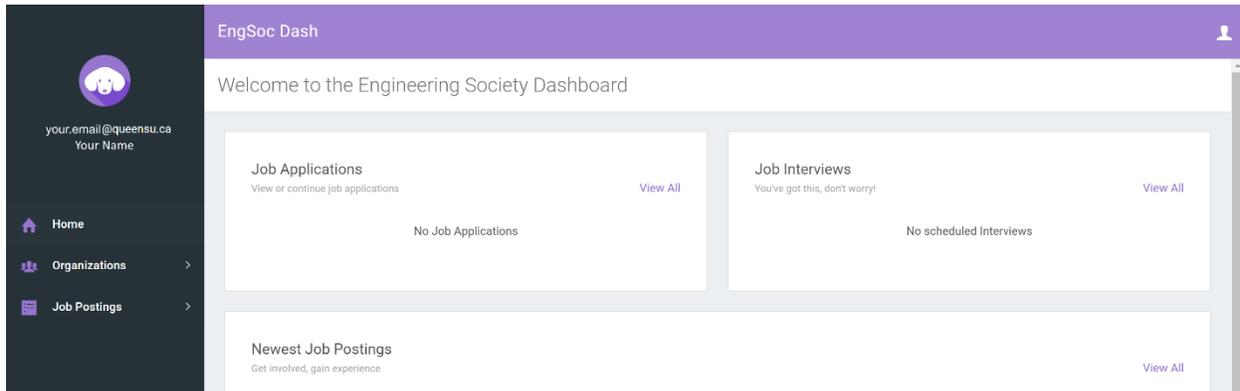


Figure 3: Dash home page once profile has been filled out.

## Organizations

An **organization** emulates a team within the Engineering Society. Typically, there will be a general member job, a manager job, and then a director overseeing the manager. The director overseeing the manager job is set to manager level access as well. Key things about organizations include the following:

- Are a group of related jobs
- Are categorized by department (chosen from pre-made list)
- Jobs set to manger level access can edit the organization

The director job (or oversight job, typically a director) will be duplicated throughout multiple organizations if their portfolio has multiple teams. This is so that the director has manager access to each organization, without having admin privileges to the entire website. This way they can hire/edit the manager job, without having access to edit an organization in another director's portfolio.

**Note:** Organizations can only be created by administrators.

### Example

The Software Development Team (ESSDev) is an organization. It has ESSDev Manager, ESSDev Member and Director of IT jobs, with the Manager and Director jobs set to "Manager Position" and ESSDev member set to "General Member Position".

The IT Team is not the organization, only ESSDev. The other parts of the IT Team (IT Operations, IT Outreach) have their own separate organizations, as there are different managers that will hire the members of Operations/Outreach. The Director of IT has a job in each of these organizations, and the organizations are "linked" because they all have their department set as "Information Technology".

## Organization Descriptions

Organizations should be populated with a description that is updated to contain relevant information about what the team does for reference by others. This can be edited by navigating to an organization you manage, clicking on the three dots in the upper right corner of the screen, and clicking on *Edit Organization*. All fields must be filled in before you can save your changes.

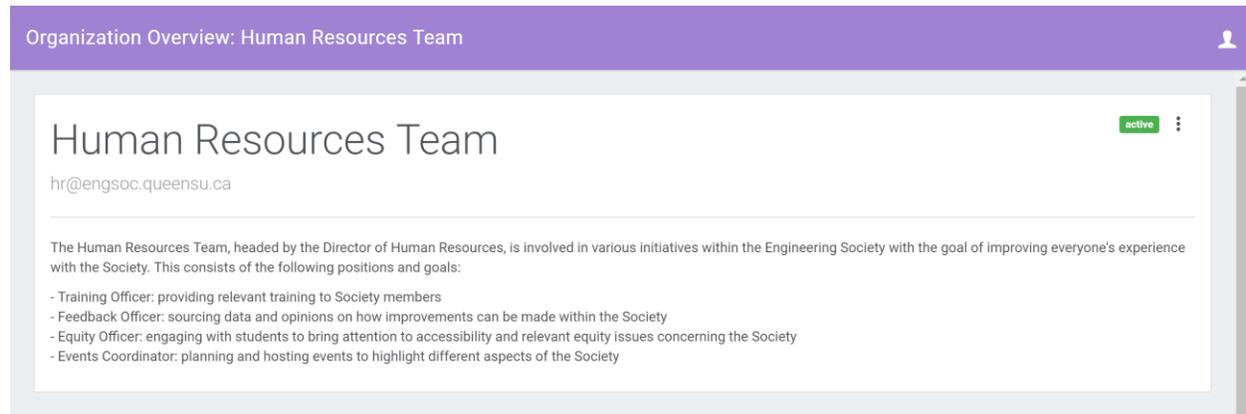


Figure 4: Example of a filled organization description.

## Organization Positions

Positions are defined to give different access to edit, add/remove, and approve to different positions.

**Administrator Position:** Has all-access to Dash. Can add/edit organizations, jobs, positions, etc. and approve job postings. Can remove people from positions and delete jobs.

**Manager Position:** Has access to edit the specific organization in which they are a manager. Can add/edit jobs, add people to positions, and create job postings.

**General Member Position:** Is part of that organization. Doesn't have any special powers.

## Jobs

A **job** emulates the actual title an individual has and is always contained within an organization. The job is only the title – whether someone currently holds the job is a different matter. Things to keep in mind about jobs:

- They refer to an actual role within EngSoc
- Are contained within organizations
- Can be edited by managers of the organization containing the job

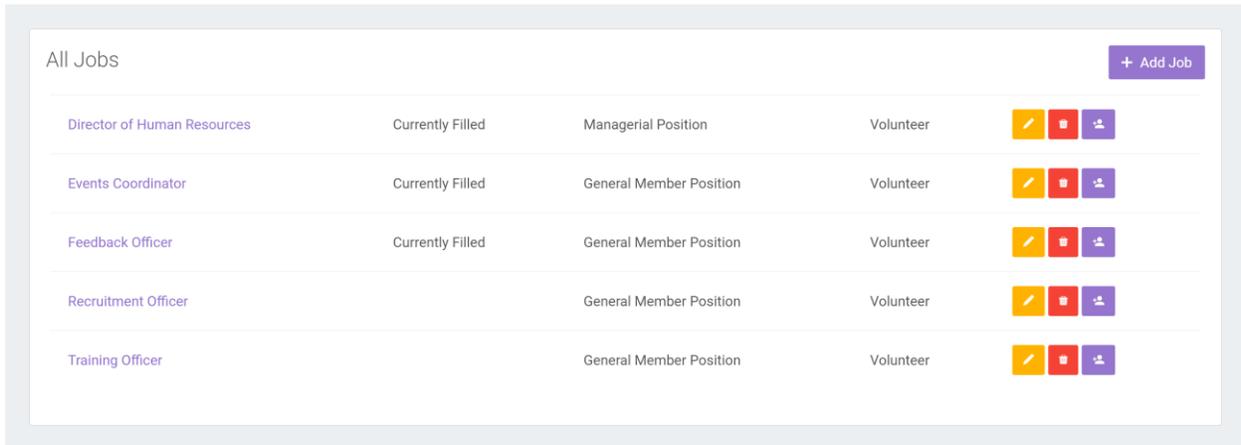
Current holders of jobs can be seen under the organization description. By clicking on the position, one can see the organization the job is tied to and a description of the job. Jobs can be created by managers of that organization.

## Example

The Director of IT is a job within the EngSoc Directors organization (and in other IT organizations). If the current Director of IT were to step down, the Director of IT job would still exist in Dash.

## Managing Jobs

Jobs can be added, and their descriptions modified, from the organization page. Clicking the yellow pencil button allows you to edit the job, and clicking the purple head allows you to assign a person to the job. It is not recommended to press the red garbage can (if available) to delete positions unless one has been added wrongly. Consult an admin before deleting jobs, but in most cases, even if a position becomes obsolete, it is recommended to keep these old jobs for record keeping purposes.



All Jobs				<a href="#">+ Add Job</a>
<a href="#">Director of Human Resources</a>	Currently Filled	Managerial Position	Volunteer	  
<a href="#">Events Coordinator</a>	Currently Filled	General Member Position	Volunteer	  
<a href="#">Feedback Officer</a>	Currently Filled	General Member Position	Volunteer	  
<a href="#">Recruitment Officer</a>		General Member Position	Volunteer	  
<a href="#">Training Officer</a>		General Member Position	Volunteer	  

Figure 5: Example of jobs list on an Organization page.

One can click on a job to see a detailed description, its responsibilities, and a history of who has held that job in the past. As with an organization, this description can be edited by a manager using the three-dot menu in the top right and should be kept up to date for reference by members and prospective applicants.

## Positions

A **position** emulates someone being hired to hold a job title. Multiple people can be assigned to hold the same job title, creating multiple positions for one job. Managers can assign Dash users to positions within their organization by choosing a job, choosing to create a position, and then entering the user's email. Thing to keep in mind about positions:

- It's a person who holds a job
- Has a term
- Are assigned using their email

Having the ability to assign more than one person to a job allows for incoming positions to gain management access to organizations for hiring each year, while old positions can still retain their status in EngSoc Dash. Alternatively, people can be removed, and the new position created for the new person hired. Typically, replacement would be fine, as Dash only requires access for hiring, and outgoing people will not be hiring.

**Note:** It is usually recommended that people be replaced in their jobs on Dash to keep hiring confidential and only accessible to the incoming managers.

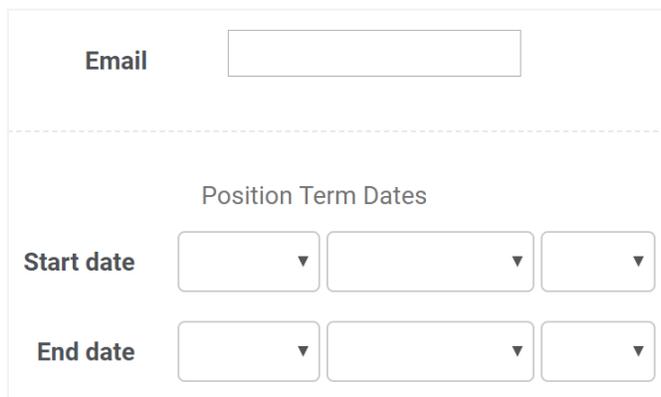
**Note:** Managers cannot remove or edit positions. Consult an admin for additional help.

## Example

Carson is the current Director of IT, so has been assigned a position under the Director of IT job in the EngSoc Directors organization, as well as the positions under the DoIT jobs in IT Outreach, IT Operations and ESSDev organizations. Max has just been hired as the new Director of IT for the next year. Max is going to be hiring the ESSDev and IT Operations managers, so for those two organizations, Carson is removed from his position, and Max is assigned a position under the DoIT job for those organizations. Carson was removed so that he cannot see who applies for ESSDev/IT Operations managers. Carson is still the Director of IT, so he holds his position under the EngSoc Directors organization. On May 1, Max officially takes the Director of IT job, so Carson is removed from the EngSoc Directors DoIT position and Max is assigned. In September, Max chooses to resign from the DoIT role, and thus he is removed from all DoIT positions in EngSoc Dash.

## Adding People to Positions Manually

When not going through the hiring process, or if a job posting has already been closed, people can be added to positions manually. This requires the Queen's email that shows up in the top left of their screen in Dash. To add them, navigate to the position page and click on *Assign Users to Job* button. Fill out their email as well as their term and click *Create Position* to add them.



<b>Email</b>	<input type="text"/>
Position Term Dates	
<b>Start date</b>	<input type="text" value="▼"/> <input type="text" value="▼"/> <input type="text" value="▼"/>
<b>End date</b>	<input type="text" value="▼"/> <input type="text" value="▼"/> <input type="text" value="▼"/>

Figure 6: Form to add someone manually to a position.

## Job Postings

Job postings are where people can apply to hold a position within an organization. They can be created by organization managers from the “Manage Job Postings” page. These postings can have questions as well as ask for resumes to be attached. Things to keep in mind about job postings:

- These are open postings where people can apply to hold a position for a given job
- Can have questions, can have resume attached
- Schedule interview time through each application to a posting

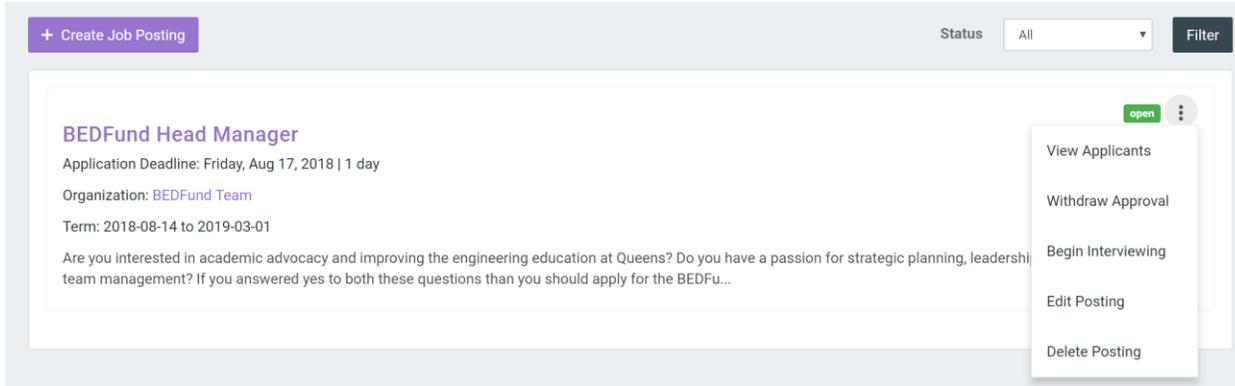


Figure 7: Example Job Posting.

## Uploading Documents

Due to how Dash manages its files, only a single file can be attached to a specific application. If multiple documents are asked for, make sure to tell the applicant to consolidate all documents into a single file before uploading. Acceptable file formats for Dash include pdf, doc, and docx files under 2 MB.

## Hiring Process

To start the hiring process, navigate to the position you wish to hire for. Above the position history, find either the *Create Job Posting* button or the *View Job Posting* button. Both of these buttons create job postings and only vary if a job is new or not.



Figure 8: Create Job Posting button: if this a new position that has never been hired before on Dash.



Figure 9: View Job Posting button: if this position has already been hired for before and the posting just needs to be updated.

You can also navigate to the “Manage Job Postings” page and click on the *Create Job Posting* button in the top left of the page to see all available jobs for which you can open a posting.



Figure 10: Create Job Posting button on the Manager Job Postings page.

## Reopening a Job Posting

If a position has already been hired for, to open a job posting is a bit more click-intensive. After navigating to the job posting, and if it says “closed” in the top left, navigate to the *View Applicants* page using the dropdown menu in the top right. On this page you should be able to click an orange *Reopen Job Posting* button that will archive all past applicants and allow for you to edit the posting.



Figure 11: Reopen Job Posting button, as seen in the top right of a closed job posting on the applicants page.

## Creating the Posting

When creating a job posting, you will be taken through two pages to complete before your posting can be approved. On the first page, be sure to add/edit the description of the position to include a good overview of the responsibilities of the position, good qualities to have for someone seeking the position, and a means of contact if someone has further questions about the position. The application closing date should be set so that a 2-week period is available for people to apply for the positions (due to EngSoc Policy γ.B).

When choosing the time for which someone will be holding a position, be sure to add the correct start date. If they need to hire, their start date should be before they need to hire people, if they don't need to hire, the default start date should be May 1<sup>st</sup> of that year. Be sure to set this properly as it cannot be easily changed once the form is submitted.

**Note:** Currently, the closing date for an application is the date before it is listed, at midnight.

Once the description and dates have been added, questions can be added on the next page. Questions can be added, edited, and removed from this page. Once questions have been added, click *complete* at the bottom of the page. Before it is available for people to apply, your job posting must be approved by an administrator. Contact the Director of HR for this to be done.

**Note:** To edit or delete questions, use the green and red buttons next to the particular question. Only one question can be edited at a time. Click the respective check button after each question is edited.



Figure 12: Question edit and delete buttons.

## Managing Your Posting

To see who has applied so far, navigate to the job postings page, and in the upper right corner of the posting, click the three dots, and then click *View Applicants*. Once the 2-week period is over, the posting must be set to *Begin Interviewing* from the same dropdown menu as *View Applicants*, or by clicking the *Begin Interviewing* button. From there, select times for interviews for each individual applicant from the applicants page.



Figure 13: Begin Interviewing button, as seen in the top right of the View Applicants page.

**Note:** If a posting needs to be reopened after being set to “Interviewing”, contact the Director of Human Resources to reopen the posting.

When interviews are completed, and the candidate(s) is/are selected, be sure to click *Hire* on each applicant you want to hire. Once those are selected, then navigate to the “View Applicants” page and click on the *Close Job Posting* button in the top right corner to decline all other applicants and close the posting.

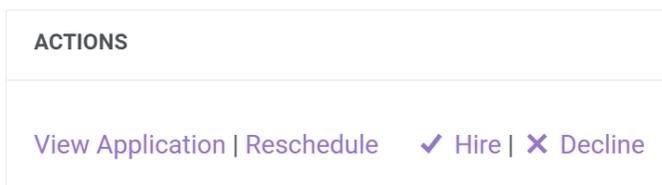


Figure 14: Options to choose from in the list of applicants.



Figure 15: Close Job Posting button. Don't press this button until you have hired everyone you plan to hire, and the hiring process is finished.

Once this is done, you're done with the hiring process!

**Note:** Pressing *Close Job Posting* automatically denies anyone who you haven't already hired or declined.

**Note:** Once *Close Job Posting* has been pressed, access to that application will be restricted to admins. You will no longer have access without their help.

## Admin Access

Admin positions have full access to every organization and user. They can edit/delete/create anything, and are the only jobs that can approve new organizations, new job postings, etc. The following positions have admin access:

- President
- VP Student Affairs
- VP Operations
- Director of HR
- Director of IT

At least one admin position will need to be active at all times in case approvals/edits need to be made. An admin can set any other position to have admin access. A specific user can also be set to be an admin through the server, using database commands. Note that when the end date of their position is reached, they will no longer be able to access the admin functions. To prevent being locked out of Dash, ensure that there's always someone in the position of an admin at all times.

## Elevated Permission Access

For Admins and Managers, there are extra menus on the left-hand side. If you were to view organizations from the general menu, there are different options compared to normal users. For more information, consult the Director of HR or Director of IT.

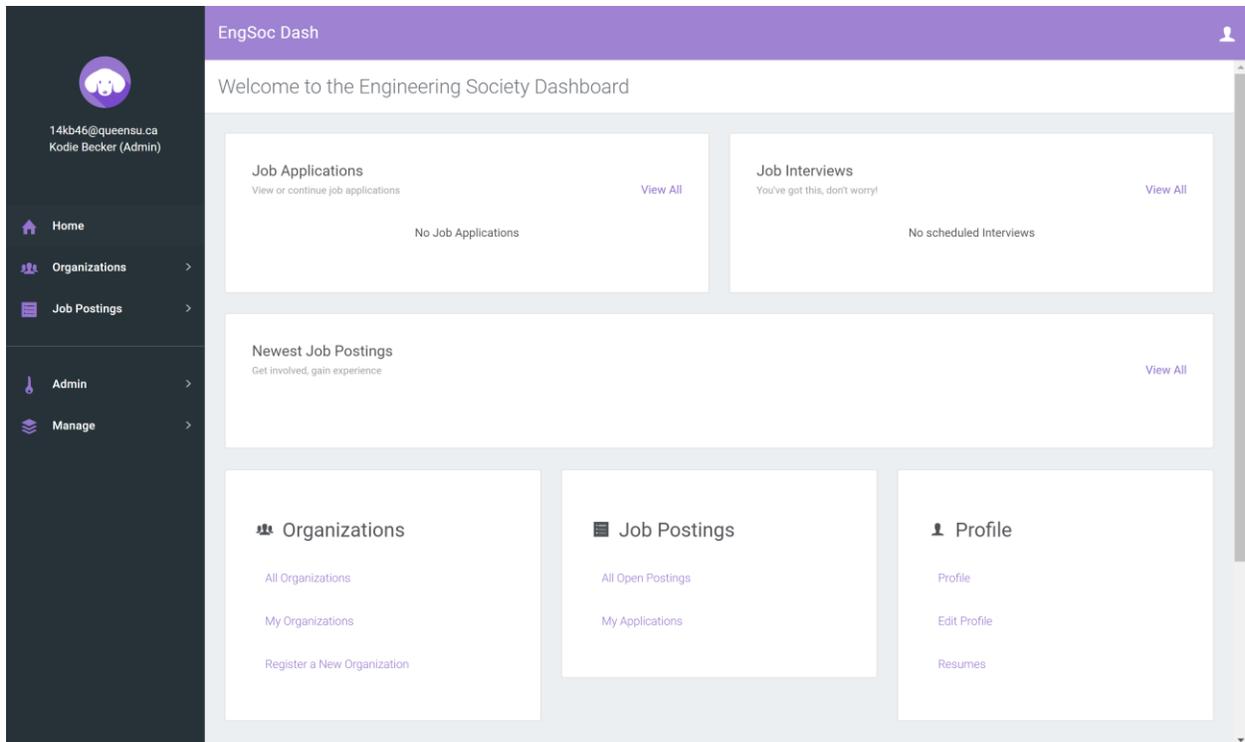


Figure 16: The Dash home page (as seen from an admin's perspective). For a normal user, the "Admin" and "Manage" options would not be available. Managers of organizations will have access to the "Manage" menu.

## Approvals

New Organizations and Job Postings need to be approved by an admin. To approve these postings, in the *Admin* panel, go to *Organizations* or *Job Postings* (depending on what needs approval) and you can filter by "Waiting for Approval". Organizations can only be made by admins. If the status of an Organization is set to waiting for approval, an error screen will appear, but the Organization is still made. Thing to keep in mind with approvals:

- Job postings can only be approved by admins
- Can edit anything only when something waiting on approval
- Admins can revoke approval anytime

**Note:** Job postings can only be edited when they are waiting for approval. To edit an application that has been approved, approval needs to be revoked before edits can be made.

**Note:** To reopen an application set to "Interviewing", it simply needs to be re-approved from the top right dropdown menu.

## Known Issues in Dash

Because Dash is new and still in development, there are a few issues that are known. These have been listed below and will (hopefully) be addressed in future updates to the platform.

- An admin can click on a pending approval organization, but an error screen is thrown
  - Not a large issue, as important information can be seen from the approval screen, and it could be approved, viewed, then approval revoked if there are issues
  - Also not a huge issue because only admins can create organizations
  - Can still edit organization too
- A manager of an organization can go into closed job postings and view declined applications
  - This should be switched to only admins can see declined/archived applications
  - Can delete the job posting afterwards, just means some information is lost, e.g. if want to review application if need to quickly hire someone else because person stepped down
- When editing organizations, the department must be set manually every time before clicking save.
- There is no way to delete an application (from the applicant's side) once it has been started. It will automatically be deleted when the application time frame ends.
- Deleting a posting will delete the position associated with it. **DON'T DO THIS.**
- Interview questions display in the opposite/random order after saved.
- The due date for a posting is the day before the one listed, at midnight.
- Due to the way Dash stores data, if someone changes their email alias, they will lose access to everything that was registered with their previous email. They will need to be re-added to their positions using their new email alias.

## Contributors

Here is a list of contributors to this document for future reference. Feel free to get in contact with them if you have any questions.

- Carson Cook – President (2018-2019)
- Kodie Becker – Director of Human Resources (2018-2019)