HR-TMS

Position Management Module
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Login Information:

1. Website address: https://bsu.peopleadmin.com/hr/shibboleth or you can find the HR-TMS link on https://my.bsu.edu under Additional Tools.

2. You can log in by clicking on the yellow “Click Here to log in with your BSU Computer User Name and Password” link or you can click on the white “SSO Authentication link.”

*Please note: the username and password fields will only be used if you, as an employee, have applied to an open position through the Applicant Portal and set up an account username and password.*
Introduction & Home Page:

Once you have logged into PeopleAdmin, the Home Page will display an inbox, watch list, and other items where you easily navigate to actions which need your attention. Below is a detailed list of the Home Page and the functions available:

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Location</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>💌 Inbox</td>
<td>CENTER of Home Page upon log in</td>
<td>Displays all items requesting your attention (approval/review).</td>
</tr>
<tr>
<td>🕵️ Watch List</td>
<td>BOTTOM of Home Page upon log in</td>
<td>Displays any request you are watching (postings, position actions) for easy access.</td>
</tr>
<tr>
<td>⚙️ My Profile  Help</td>
<td>Columns at TOP of screen</td>
<td>Used to update your user account details and online help for using the system.</td>
</tr>
<tr>
<td>🕊 Module Type Selection</td>
<td>Upper RIGHT hand corner of screen</td>
<td>Used to toggle between the Position Management and Applicant Tracking modules.</td>
</tr>
<tr>
<td>🕊 User Group Selection</td>
<td>Upper RIGHT hand corner next to your name</td>
<td>Displays the user groups available to you and the arrow will toggle you into each user group.</td>
</tr>
</tbody>
</table>

Watch for the following Icons:

⚠️ This icon indicates that there is missing information in a section which must be completed before next action in workflow can be taken.

✅ This icon indicates a section is complete, but will still allow editing in some instances.
Module Type Definitions

**POSITION MANAGEMENT**
Used to view Position Descriptions, submit New Position Actions, and Modify Position Descriptions.

**APPLICANT TRACKING**
Used to view Postings, Applicants, and complete Hiring Proposals.

User Group Definitions

**Applicant Reviewer:** Reviews applicants per posting and forwards actions to Hiring Manager.

**Hiring Manager:** Create a new position action or modify position description. Reviews applicants per posting and approves hiring proposals for new hires. Forwards action to Chair/Director, depending on workflow.

**Chair/Director:** Can initiate a new position action or modify position description. Approves actions sent from the Hiring Manager user group. Forwards action to AVP/Dean user group, depending on workflow.

**AVP/Dean:** Can initiate a new position action or modify position description. Approves actions sent from the Chair/Director user group. Forwards actions to Vice President for review.

**Vice President:** Can initiate a new position action or modify position description. Approves actions sent from the AVP/Dean user group. Forwards actions to Human Resources for initial review.

**Sponsored Projects Administration:** Reviews and approves grant funded position actions.

**Budget:** Reviews and approves all position actions for budget confirmation. Forwards action to the President/VP of Business Affairs user group.

**President/VP of Business Affairs:** Reviews and approves position actions on behalf of the President.

**Search Committee member:** Invited by Hiring Manager to participate in review of candidates and/or interviews.

**Please note:** Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions. Position action can include: initiating a posting form, creating or modifying a position description, or approving a position and/or hiring proposal.
Position Management Module
(orange header background – changes to blue when you are in Applicant Tracking module)

To select the position management module, click on the drop-down menu button located in the top right corner of the home page and select Position Management.

Make sure you are logged in as the correct user group. If not, use the drop-down menu to select correct group and click on the refresh button.

Core Functions of the Position Management Module

- View, create, or modify your Staff position descriptions
- Access active position description requests
**Position Management Module**

Creating a New Position Description (New Position Request):

1. Verify you are in the Position Management module and either Hiring Manager, Chair/Director, or AVP/Dean user group.

2. Hover over Position Descriptions and select appropriate classification.

3. Click the button at the top right corner.

4. You will receive a pop-up window to choose the action you would like to start. Click on **New Position Description**.

5. Enter the proposed Position Title.

6. The Organization Unit section will default unless you have responsibility for more than one department. You will then select from the drop down list.

7. If you have an existing position description within your department(s) you wish to copy or ‘clone,’ choose that position description from the list at the bottom of the page. This will pull in pertinent information from the ‘cloned’ position description into this action and allow for edits.

8. Click the **Start Position Request** button.
9. Complete all required information in each of the sections which are listed on the left hand side of the screen. Please note that if you ‘cloned’ from an existing position description many of the fields will be prepopulated and ready for you to edit if applicable.

10. The following is a list of the sections within a new position action that will need to be completed. The sections with a check mark next to the section indicate all required fields have been completed.

11. To take action, hover over the Take Action on Position Request button at the top right hand corner of the page and select one of the following:

- Position Justification
- Enter position details such as hours per week, position function, essential job duties, education, and experience required. If a new position is being created, Human Resources will create and enter new position number after position request has been moved to HR in the approval workflow.
- State justification for new position request.
- Identify funding sources for this position. Grant funding is also identified in this section.
- Select supervisor’s position from list.
- Upload optional supporting documents for the new position action.
- On the Position Request Summary page, prior to taking action, you will review for accuracy all of the information you entered into the request or make additional edits if necessary.

*Please note, to save this request and submit later, please select ‘Keep working on this Position Request.’ If there are additional approvers within the department, you will need to select the appropriate action per the workflow.*

12. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. You can enter any comments you want before submitting, but please note comments will be tied to the historical record of this action. If you want to include the action on your watch list, check that box before clicking Submit.
13. You will receive a green bar on the top of your page that will state the action was successfully transitioned.
**Position Management Module**

**Modifying an Existing Position Description:**

1. Verify you are in the Position Management module and either Hiring Manager, Chair/Director, or AVP/Dean user group.

2. Hover over Position Descriptions menu and select appropriate classification.

3. Search for and select the position description you wish to update.

4. Click the Modify Position Description link within the position summary (upper right hand corner).

5. Click **Start** on the modify position description page.
6. The following is a list of the sections within the Modify Position Description Action that will need to be completed. The sections that have a check mark next to the section indicate all required fields have been completed.

- **Position Justification**
- **Position Details**
- **FOAP Details**
- **Employee**
- **Supervisory Position**

### Position Documents
- **Position Request Summary**

- Enter your reason for position modification.
- Update position details.
- Identify funding sources for this position. Grant funding is also identified in this section.
- If you are preparing the position description for posting due to a vacancy, you can vacate the current employee that is currently linked to the position description.
- Select supervisor's position from list.
- Upload optional supporting documents for the new position action.
- On the Position Request Summary page, prior to taking action, you will review for accuracy all of the information you entered into the request or make additional edits if necessary.

7. To take action, hover over the Take Action on Position Request button at the top right hand corner of the page and select one of the following:

- **Keep working on this Position Request**
- **WORKFLOW ACTIONS**
  - Submit (move to Chair/Director)
  - Submit (move to AVP/Dean)
  - Submit (move to Vice President)

*Please note, to save this request and submit it later, please select ‘Keep working on this action.’ If there are additional approvers within the department, you will need to select the appropriate action per the workflow.*

8. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. You can enter any comments you want before submitting, but please note comments will be tied to the historical record of this action. If you want to include the action on your watch list, check that box before clicking **Submit**.
9. You will receive a green bar on the top of your page that will state the action was successfully transitioned.
**Position Management Module**

**Approving a Position Description Action:**

1. Verify you are in the Position Management module and in the correct user group for approval.

2. Click on the Position Requests tab in the Inbox (located on Home Page).

3. Locate the title of the Position Description in your Inbox you wish to take action on. Click on the title.

4. You will then be directed to a Summary Page where you can review for accuracy.

5. To take action, hover over the Take Action on Position Request button at the top right hand corner of the page and select one of the following:

   *Please note, to save this request and submit later, please select 'Keep working on this Position Request.' If there are additional approvers within the department, you will need to select appropriate action per the workflow.*
6. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. You can enter any comments you want before submitting, but please note comments will be tied to the historical record of this action. If you want to include the action on your watch list, check that box before clicking Submit.

7. You will receive a green bar on the top of your page that will state the action was successfully transitioned.