

PeopleAdmin

# Ball State University HR-TMS Training Guide: Service

Human Resource's Talent Management System

## Human Resource's Talent Management System (HR-TMS) and PeopleAdmin

As we embrace our role as a model 21st century public research university, we envision our recruitment and hiring practices to be more efficient and convenient for both applicants and hiring managers at Ball State University. We are therefore pleased to be implementing Human Resource's new online Talent Management System (HR-TMS).

HR-TMS will enhance the applicant experience by giving those interested in employment opportunities at Ball State University the ability to apply for positions 24/7 anytime, anywhere, through an online applicant portal. It will also allow hiring managers the online ability to create and maintain job descriptions for their areas, create job postings, view a candidate's application materials, and hire employees.

The online system, HR-TMS, will be hosted by PeopleAdmin. PeopleAdmin's mission is "To help government and education build a better future by providing leading talent management solutions that connect the right people to the right jobs." They focus exclusively on education and government and have cultivated a deep understanding of the needs within these two sectors, which has enabled them to add value to their customers and the communities they support. They are proud to be a recognized leader in talent management solutions designed specifically for education and government. PeopleAdmin works with more than 700 institutions of higher education and has received numerous awards (<http://www.peopleadmin.com/>).



It is with great enthusiasm that we begin the rollout of the service applicant portal along with service position management and applicant tracking modules. We are pleased to offer you this step-by-step training manual for the Service phase of our rollout.

Should you have any questions about this exciting HR online recruitment initiative or need assistance in completing an action in the HR-TMS, please email:

**ERPHER@bsu.edu**

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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.*

Ball State University

[Click here to log in with your BSU Computer User Name and Password](#)

Username

Password



Log In

Authenticate with single sign-on? [SSO Authentication](#)



## Introduction & Home Page:

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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:

<u>Functional Area</u>	<u>Location</u>	<u>Definition</u>
 <b>Inbox</b>	<b>CENTER</b> of Home Page upon log in	Displays all items requesting your attention (approval/review).
 <b>Watch List</b>	<b>BOTTOM</b> of Home Page upon log in	Displays any request you are watching (postings, position actions) for easy access.
<b>My Profile</b> <b>Help</b>	Columns at <b>TOP</b> of screen	Used to update your user account details and online help for using the system.
<b>Module Type Selection</b> <b>POSITION MANAGEMENT</b> ▼ <b>APPLICANT TRACKING</b> ▼	Upper <b>RIGHT</b> hand corner of screen	Used to toggle between the Position Management and Applicant Tracking modules.
<b>User Group Selection</b> Hiring Manager ▼ <b>logout</b>	Upper <b>RIGHT</b> hand corner next to your name	Displays the user groups available to you.

### 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.

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## 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.

**Service 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 Next Level Supervisor or Chair/Director, depending on workflow.

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

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

**Preliminary Budget Review:** Reviews and approves budget information. Forwards actions to the AVP/Dean.

**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.

**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.

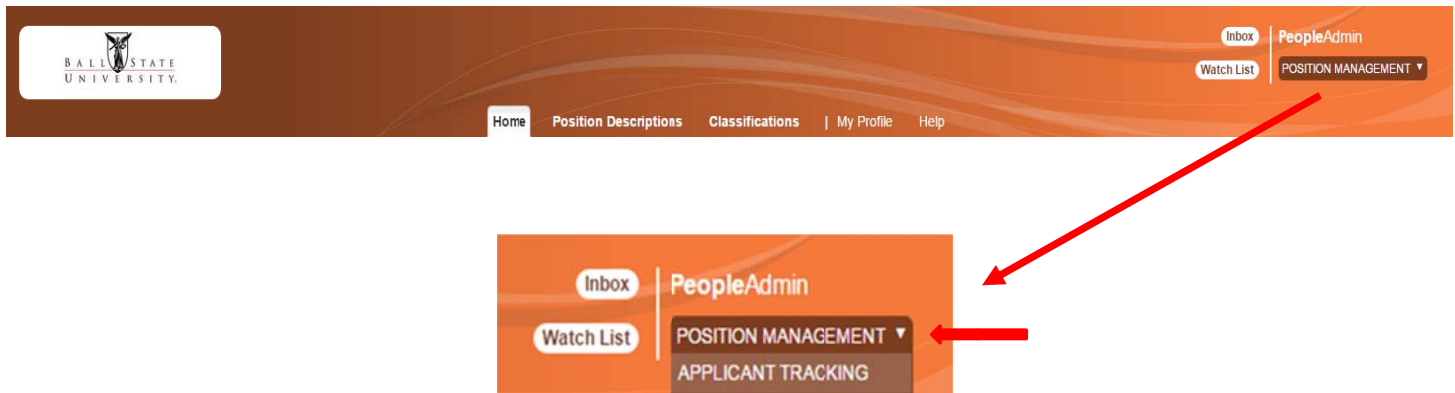
**Search Committee member:** Invited by Hiring Manager to participate in review of candidates and/or interviews.

**\*\*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.

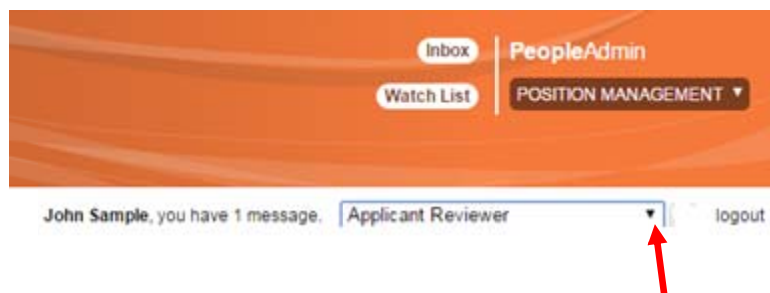
## Position Management Module

(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.



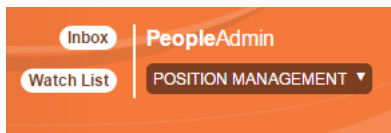
### Core Functions of the Position Management Module

- View, create, or modify your Staff position descriptions
- Access active position description requests

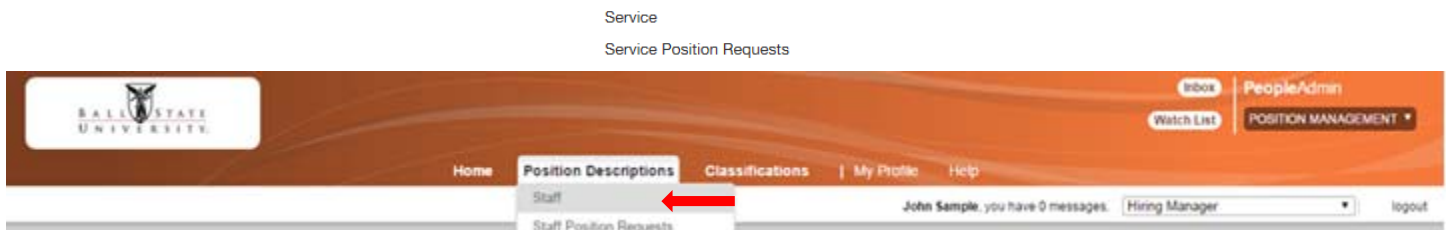
## Position Management Module

### Creating a New Position Description (New Position Request):

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




2. Hover over Position Descriptions and click **Service**.



3. Click the **Create New Position Description** 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,' click on "Filter these results." You can search for the position description you would like to clone by searching on a title, position number, or department and then clicking on Search.

### Clone an existing Position Description?

 [Filter these results](#)



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8. Once position has been located, click on the radio button next to the title of the position you wish to clone.

Position Title	Position Number
<input type="radio"/> Account Reconciliation Specialist	102150
<input checked="" type="radio"/> Accounting, Accounts Payable Representative	102149
<input type="radio"/> Accounting, Accounts Payable Representative	102153

9. Click the **Start Position Request** button.

Start Position Request

10. This will pull in pertinent information from the 'cloned' position description into this action and allow for edits.
11. 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.
12. 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.

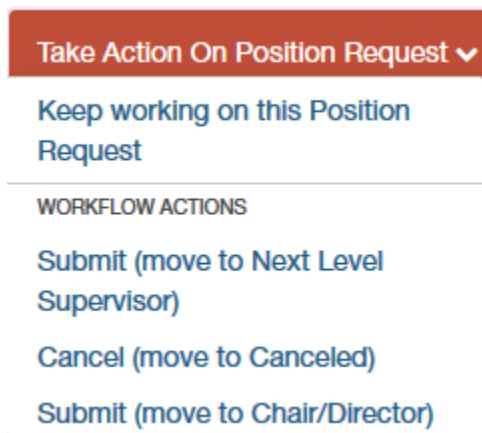
**Editing Position Request**

- ☒ **Position Justification**
  - State justification for new position request.
- ☒ **Position Details**
  - 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.
- ☒ **FOAP Details**
  - Identify funding sources for this position. Grant funding is also identified in this section.
- ☒ **Supervisory Position**
  - Select supervisor's position from list.
- ☒ **Position Documents**
  - Upload optional supporting documents for the new position action.
- Position Request Summary**
  - 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.

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13. 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 the appropriate action per the workflow.*

14. 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**.
15. You will receive a light blue bar on the top of your page that will state the action was successfully transitioned.

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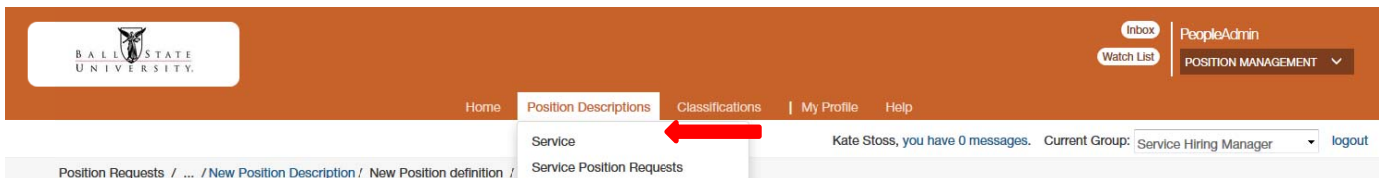
## Position Management Module

### Modifying an Existing Position Description:

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




2. Hover over Position Descriptions menu and select **Service**.



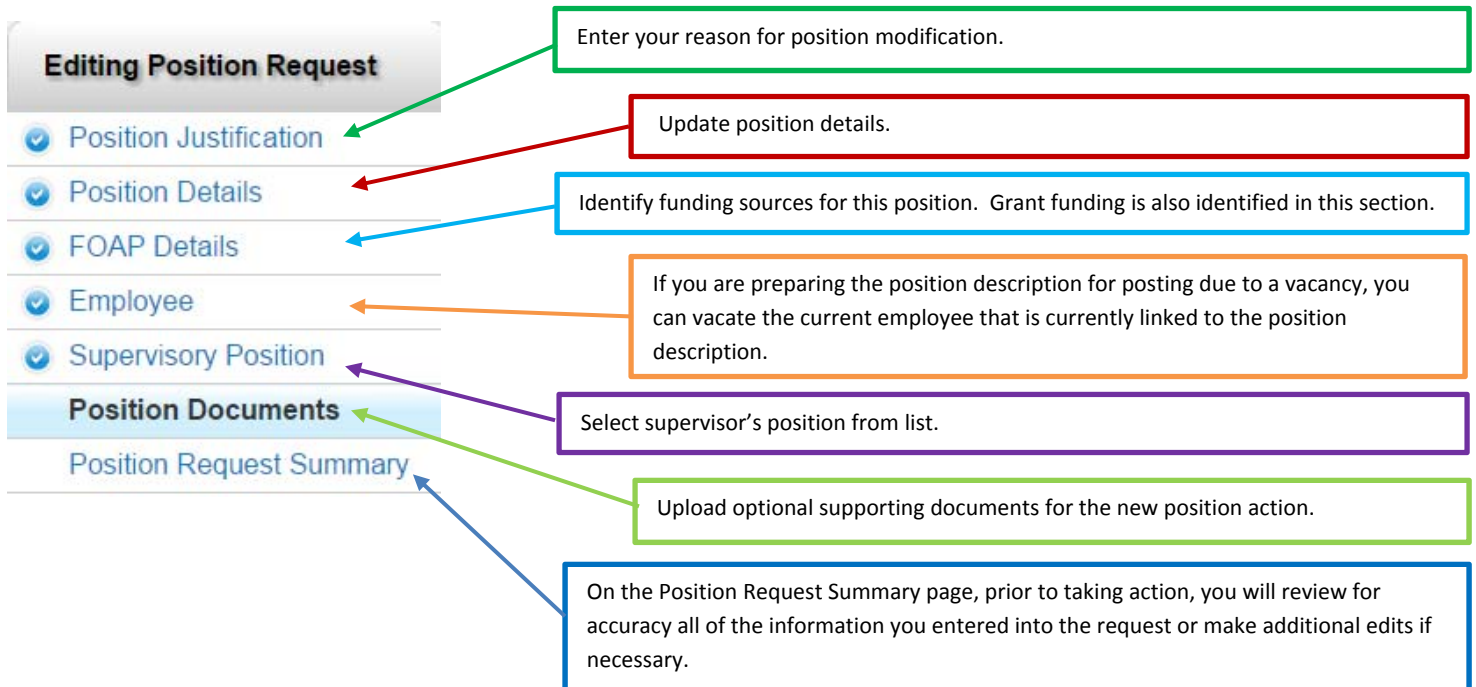
3. Search for and select the position description you wish to update.
4. Click the Modify Position Description link within the position summary (upper right hand corner).



5. Click  on the modify position description page.

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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.



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:



*Please note, to save this request and submit it later, please select 'Keep working on this action.' Service positions are submitted directly to HR for review.*

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**.

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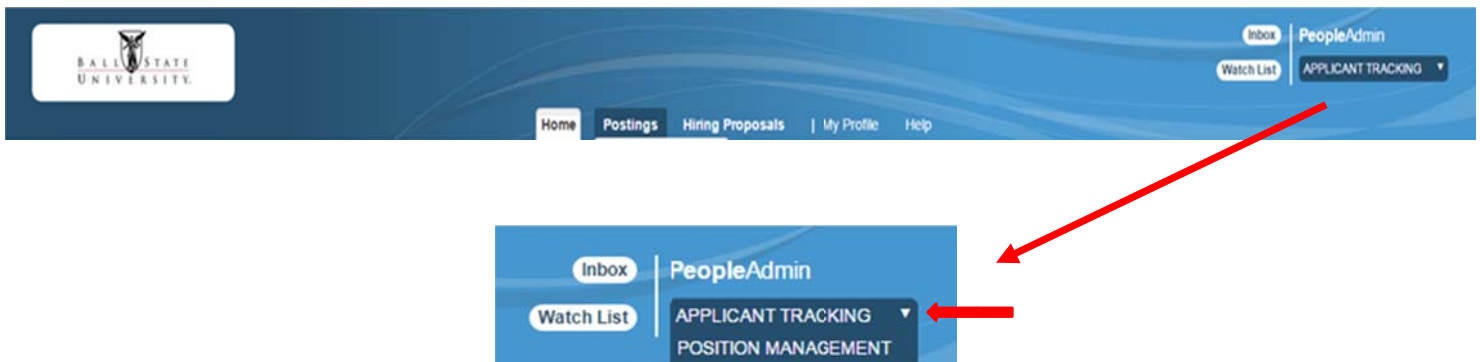
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9. You will receive a light blue bar on the top of your page that will state the action was successfully transitioned.

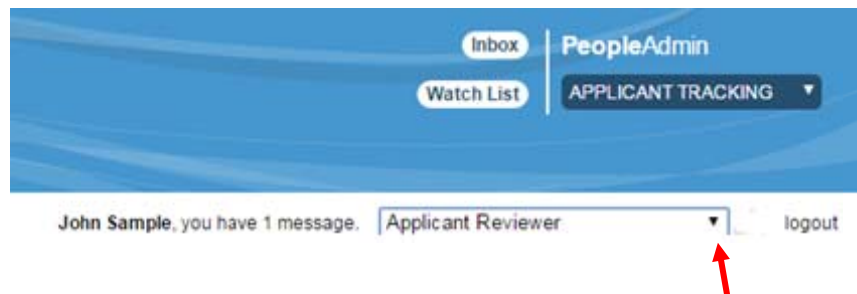
### Applicant Tracking Module

(blue background – changes to orange when you are in the Position Management module)

To select the Applicant Tracking module, click on the drop-down menu button located in the top right corner of the home page and select Applicant Tracking.



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



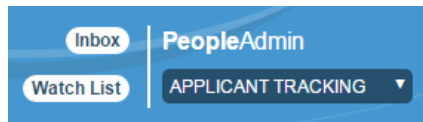
#### Core Functions of the Applicant Tracking Module:

1. Create a posting or approve a posting for recruitment
2. View job postings and applicant materials
3. Create Hiring Proposals

## *Applicant Tracking Module*


### Creating New Postings:

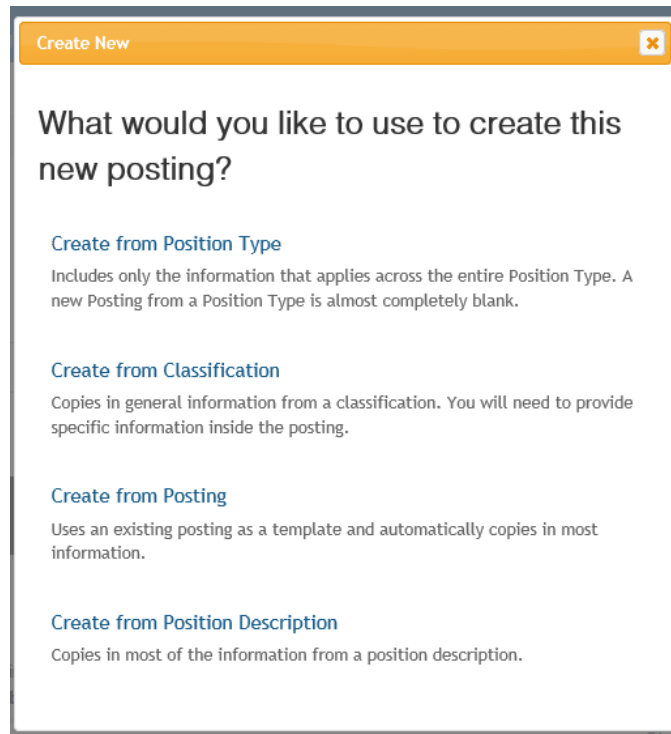
1. Verify you are in the Applicant Tracking module as either the Service Hiring Manager, Service Hiring Second Level, Chair/Director, AVP/Dean, or Vice President.



2. Hover over Postings and click Service.



3. In the upper, right corner of the page, click  button.
4. A box will appear that will give four options:



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**Create from Position Type** – This option includes only the information that applies across the entire Position Type. A new posting from a Position Type is almost completely blank.


**Create from Classification** – This option copies in general information from a classification. You will need to provide specific information inside the posting.

**Create from Posting** – This option uses an existing posting as a template and automatically copies in most information.

**Create From Position Description** – This option copies in most of the information from a position description.

***\*Most positions will be created from a Position Description.***

**Please note:** If you are creating a posting for the first time, you will only see the Create from Position Description option. After you have completed a posting, you will from then on have the two options listed above.

5. Select Create from Position Description to create a posting. This will take you to a page where you may enter a title into a search box or select from a list of approved position descriptions in your department. Once you have located your desired position description, click on the Title.
6. This will take you to a page with the Position Summary. Select  Create Posting from this Position Description button at the top right corner of the page to start your posting.
7. The Position Title and Organizational Unit Division and Department will default automatically from the Position Management module.
8. The Accept Online Applications will be automatically selected. ***Do not change it.***


Online Applications

☒ Accept online applications?

9. Service postings will not use the “Special Offline Application Instructions” feature.

☐ Service Application

☐ Internal Bid Application

10. Select either the checkbox.
11. Click  at the top or bottom right side of the page. This will take you to the Editing Posting menu and Position Details page.



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**Editing Posting**

- Posting Details**: Service Hiring Manager must certify posting. Justification for hiring must be completed along with appropriate fields in Posting Detail Information section.
- Supplemental Questions**: Screening questions candidates will be asked when they apply for the position.
- Applicant Documents**: This section allows you to select which documents will be required to be uploaded with application.
- Posting Documents**: Optional - you may upload additional information regarding the posting in this section.
- Guest User**: Gives guests access to view the posting.
- Search Committee**: Allows you to assign search committee members to the posting.
- Summary**

## Posting Details

- Posting Information:** most information in this section will default into the page from the position description. Some fields are either optional or required. Required information will be indicated by a red asterisk and a red box. Title, Position Function, Duties and Responsibilities, Minimum Education/Experience, and Preferred Education/Experience are not editable. If you would like to edit any of these fields, you will need to follow the “Modify Position Description” process in the Position Management module.
- Posting Detail Information:**

Posting Detail Information	
Posting Number	
Desired Start Date	
Position End Date (if temporary)	
Applicant Reviewer	
Open Date	
Close Date	
Open Until Filled	No
Special Instructions Summary	
Quick Link for Internal Postings	<a href="http://bsu-sb.peopleadmin.com/postings/4237">http://bsu-sb.peopleadmin.com/postings/4237</a>
Application Confirmation Message	Thank you for your interest in this position at Ball State University. The screening and selection process is currently underway and will continue until a successful candidate is chosen or the search is closed. Should a review of your qualifications result in a decision to pursue your candidacy, you will be contacted using the contact information you submitted in your application.

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**Desired Start Date** – date that you would like to have someone begin working.

**Position End Date** – used for temporary assignments that have an end date. If no end date, leave field blank.

**Applicant Reviewer** – person responsible for managing the applicants through the screening and selection process – may or may not be the same as the Service Hiring Manager – can select more than one person.

**Open Date** – this is the preferred date to post the position.

**Close Date** – indicate the preferred closing date for the posting.

**Open Until Filled** – typically you will leave this field as “No” for a service position. Contact your HR Representative for further information.

**Special Instructions Summary** – optional – input specific instructions to help the applicant fully complete his/her application. Information may also be entered here to help the applicant understand your department.

**Quick Link for Internal Posting** – link to the posting in the applicant portal.

**Application Confirmation Message** – this message is what will be sent via email to the applicant once he/she has successfully submitted an application for the position.

### Supplemental Questions

- Supplemental questions are available for you to use in order to do some screening of the applicants. If you would like to use a supplemental question, please click on [Add a question](#). You may choose questions from those available by category or by keyword.

The screenshot shows a web interface for adding supplemental questions. At the top is an orange button labeled 'Add a Question'. Below it is the heading 'Available Supplemental Questions'. There are two input fields: 'Category:' with a dropdown menu currently set to 'Any', and 'Keyword:' with an empty text box. Below these fields is a table with three columns: 'Add', 'Category', and 'Question'. The table contains three rows of questions, each with an unchecked checkbox in the 'Add' column.

Add	Category	Question
<input type="checkbox"/>	Education	Do you have a bachelor's or higher degree?
<input type="checkbox"/>	Service	Do you have a CDL driver's license?
<input type="checkbox"/>	Education	Do you have a Master's degree or higher?

- If you do not see an existing question you would like to ask, Supplemental Questions can be added here. Click on [Can't find the one you want? Add a new one](#) in the bottom right corner of the box.

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A new Add a Question box will pop up.

The screenshot shows a form titled "Add a Question" with an orange header. Below the header, a note states: "Questions defined here will be 'pending' approval and will not be available for use in other areas of the system until they have been approved." The form contains the following fields:

- Name \***: A text input field.
- Status \***: A dropdown menu currently showing "pending".
- Category**: A dropdown menu showing "Please select a category".
- Question \***: A large text area for entering the question.

Below the question field, there is a section titled "Possible Answers" with two radio button options:

- ☒ Open Ended Answers
- ☐ Predefined Answers

3. Enter your name.
4. Status will remain as pending until the questions have been reviewed and approved by Human Resources.
5. Select a category for your question from the drop down list (Education, Experience, Service, Staff, Professional, or Faculty).
6. Enter the question you would like to use in the Question text box.
7. You will need to select which type of answer will be needed for your question:

This screenshot shows the "Possible Answers" section with two radio button options:

- ☒ Open Ended Answers
- ☐ Predefined Answers

8. Open ended answers allow the applicants to respond with whatever answers they choose.
9. Predefined answers allow you to choose the possible responses. Once you select Predefined Answers the Possible Answer boxes will appear. You may enter the possible answers. The default has two answers, but there is no limit. As soon as you enter the first answer in Possible Answer 1 and hit Tab, then a new line will appear as Possible Answer 3 and so on.

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### Possible Answers

☐ Open Ended Answers

☒ Predefined Answers


Empty answers will be excluded. Click and drag possible answers to reorder them.

Possible Answer 1:  x

Possible Answer 2:  x

10. Once you have selected the supplemental questions you would like to ask, click on submit.

11. In order to make sure the supplemental question required, you must select the required box.

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Education	Do you have a bachelor's degree?	active 

### Applicant Documents

Applicant Documents are the documents and information the applicant is required to submit with his or her application. The use of the "Optional" selection is not recommended, as it may create inconsistency amongst applicants. Select the "Required" selection for any documents that you would like the applicant to submit for evaluation.

Applicant Documents				
Select the documents to be required with this item, and those that may optionally be attached. Document types marked "Not Used" cannot be attached to this item.				
Order	Name	Not Used	Optional	Required
1	Resume	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2	Cover Letter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3	Undergraduate Transcripts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4	Letter of Recommendation 1	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5	Curriculum Vitae	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Master's Transcripts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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## Posting Documents

Attaching posting documents is optional - you may upload additional information regarding the posting in this section by clicking on the Actions drop down menu and selecting the appropriate action.

Document Type	Name	Status	(Actions)
Where to Advertise Position?			Actions ▾
Suggested Print Ad Text			Upload New Create New Choose Existing
Other			
Diversity Hiring Plan			

Save << Prev Next >>

## Guest User

The Guest User feature is intended for those individuals who are not a Staff or Faculty member of Ball State University but will be serving on a committee for a specific search. You will usually use this feature if you have an outside community member or BSU student on your search committee. A Guest User will be able to view the applicants and application materials for the search he/she is given access to. He/she will not have the ability to make any actions on applicants.

1. To add a Guest User, select Create Guest User Account.

### Want to give guests access to view this posting?

Create Guest User Account

2. A Username and Password fields will appear with a username and password already assigned. If you would like to change the password, update the information in the "Password" field and select the "Update Password" button. Enter the email address of the guest user and the Username and Password will be automatically sent to them. All Guest Users that are assigned will have the same Username and Password to access the specific posting.

When finished or to skip this section, click the **Next** button.

#### Guest User Credentials

Guest users may view this posting by using these credentials.

Username

gu4213

Password

9c6e5c

Update Password

#### Email Addresses of Guest User Recipients

Email addresses (one per line)

Update Guest User Recipient List

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## Search Committee Members

Search Committee Members will be able to view applicants and application materials of the applicants in the posting they are assigned.

1. To add search committee members, you may search for someone in the database by entering the first name, last name, and/or email address under Search.

### Search

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

2. Once you see the employee you would like to add to the search committee, click on the Add Member button.

### Search

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member
John Sample	email@email.com	<input type="button" value="Add Member"/>



3. If the employee will also serve as the Committee Chair, you can select the checkbox next to the Add Member button.

### Search

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member	
John Sample	email@email.com	<input type="button" value="Add Member"/>	<input checked="" type="checkbox"/> Make Member The Committee Chair



4. If the employee does not appear for selection, he or she will need to be set up in the Search Committee user role. Please enter a WorkFront request to do so. Instructions for using WorkFront are located on our Talent Management System Guides webpage:

<http://cms.bsu.edu/about/administrativeoffices/humanresources/tms>

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## Summary

Allows you to take a final look at the posting for accuracy.

After you have entered the posting information and have reviewed the Summary:

1. You may then take action on the Posting by using the drop-down menu on the upper right hand side of the page.

Take Action On Posting ▼

Keep working on this Posting

WORKFLOW ACTIONS

Cancel (move to Canceled)

Post (move to Posted)

Cancel (move to Canceled)

Approved-Pending (move to Approved-Pending)

Submit (move to VP of Business Affairs)

Post Internally (move to Posted Internal)

Return (move to Service Hiring Manager)

Return (move to Chair/Director)

Return (move to AVP/Dean)

Return (move to Vice President)

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

2. 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**.

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Take Action

Submit (move to Chair/Director)


Comments (optional)

☒ Add this posting to your watch list?

Submit

Cancel

- You will receive a blue bar on the top of your page that will state the posting was successfully transitioned.

 Posting was successfully transitioned

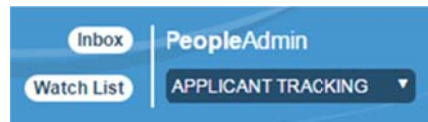


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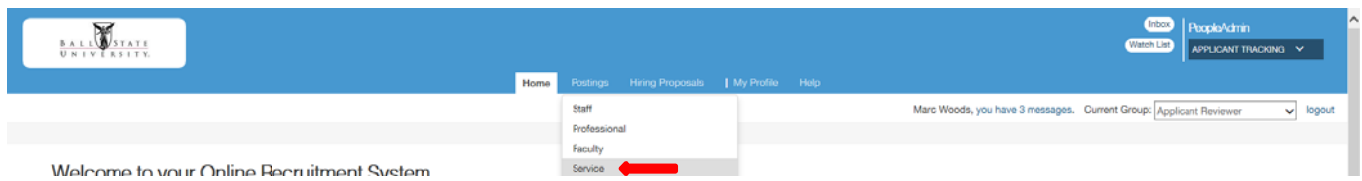
## Applicant Tracking Module

### View Job Posting:

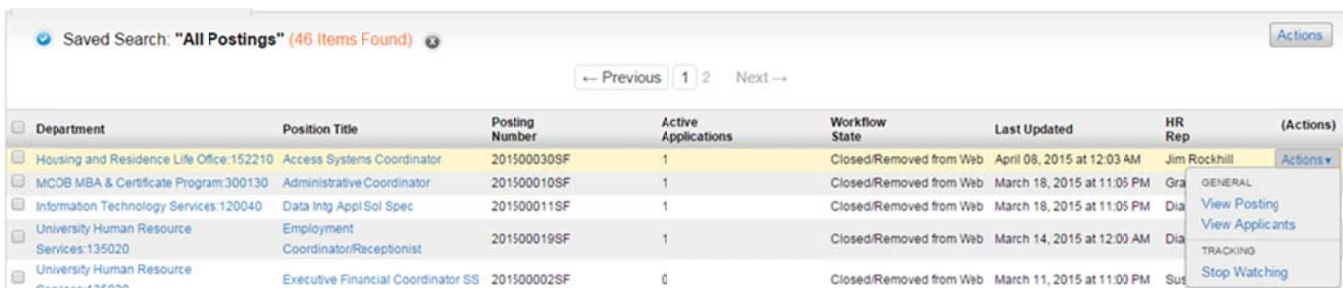
1. Verify you are in the Applicant Tracking module in the Applicant Reviewer user group.



2. Hover over Postings and select Service.



3. Locate the posting and click the Actions menu. You have two options – view posting or view applicants. Select View Posting.



Saved Search: "All Postings" (46 Items Found)

← Previous 1 2 Next →

Department	Position Title	Posting Number	Active Applications	Workflow State	Last Updated	HR Rep	(Actions)
Housing and Residence Life Office:152210	Access Systems Coordinator	201500030SF	1	Closed/Removed from Web	April 08, 2015 at 12:03 AM	Jim Rockhill	Actions
MCOS MBA & Certificate Program:300130	Administrative Coordinator	201500010SF	1	Closed/Removed from Web	March 18, 2015 at 11:05 PM	Gra	GENERAL
Information Technology Services:120040	Data Intg Appl Sol Spec	201500011SF	1	Closed/Removed from Web	March 18, 2015 at 11:05 PM	Dia	View Posting
University Human Resource Services:135020	Employment Coordinator/Receptionist	201500019SF	1	Closed/Removed from Web	March 14, 2015 at 12:00 AM	Dia	View Applicants
University Human Resource Services:135020	Executive Financial Coordinator SS	201500002SF	0	Closed/Removed from Web	March 11, 2015 at 11:00 PM	Sus	TRACKING
							Stop Watching

4. The following tabs are available with additional information associated with your posting: History, Settings, Applicants, Reports, Hiring Proposals, and Associated Position Description.

### Posting: Bookmark Café Cashier/Attendant (Service) [Edit](#)

**Current Status:** Posted

**Position Type:** Service

**Department:** The Atrium:134270

**Created by:** Diane Drake

**Owner:** Human Resources : Diane Drake

[Summary](#)

[History](#)

[Settings](#)

[Applicants](#)

[Reports](#)

[Hiring Proposals](#)

[Associated Position Description](#)

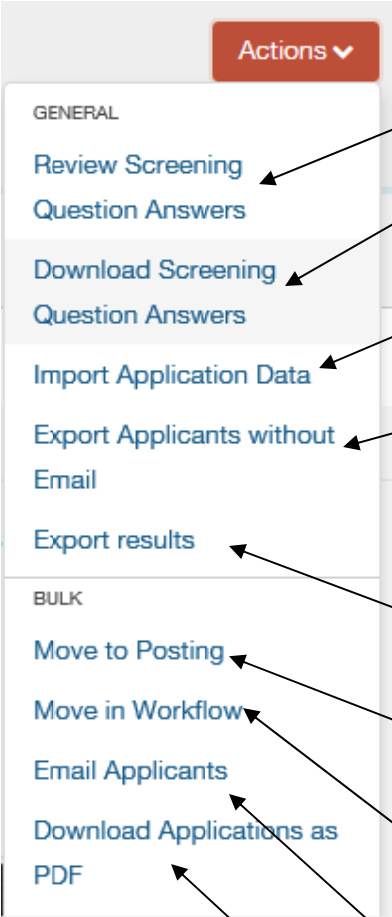
**Summary** – shows a summary of your posting.

**History** – see the workflow, attached notes or you can add a note, and emails associated with the posting.

**Applicants** - to view a single applicant's application, click on the applicant name. To perform bulk functions on applicants, select multiple applicants by checking the boxes to the left of the applicant's name.

Click the Actions button in the upper right hand corner of the table for more applicant review options.

## Ball State University HR-TMS Training Guide: Service



**Actions** ▾

**GENERAL**

- Review Screening Question Answers
- Download Screening Question Answers
- Import Application Data
- Export Applicants without Email
- Export results

**BULK**

- Move to Posting
- Move in Workflow
- Email Applicants
- Download Applications as PDF

Review Screening Question Answers allows you to see an applicant's results.

Download Screening Question Answers allows you to export into Excel for further review.

Allows you to attach documents

Allows you to export a list of applicants in Excel

Export Results allows you to export the table of selected applicants into Excel.

Allows you to set a Workflow State or disposition status

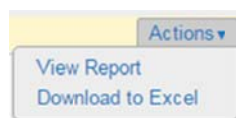
This allows you to update the status of multiple applications in the workflow.

This allows you to send an email to applicants

Download Applications as PDF will take the selected applications and create one PDF document with their applications and documents.

Reports – will show you any available reports for that position. To access a report, click on report name.

Once the report has run (status will say “Completed”), you will have two options: View Report or Download to Excel. Click on the Actions tab and select how you would like to view the report. If you click on View Report, it will open in a new window.



## Ball State University HR-TMS Training Guide: Service

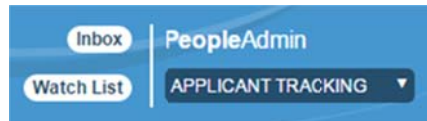
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Hiring Proposals – will show any hiring proposal(s) associated with the posting.

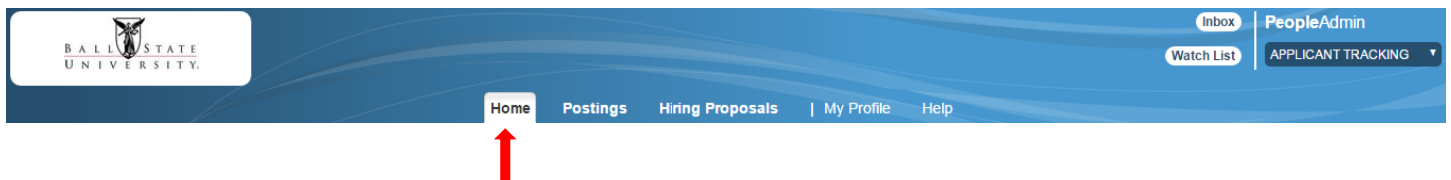
Associated Position Description – shows you the position description associated with this posting. If you are logged in as an Applicant Reviewer, this tab is not available.

### Approve Job Posting:

1. Verify you are in the Applicant Tracking module and either the Chair/Director, AVP/Dean, or Vice President user group.



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



3. Click on the Postings tab in the Inbox.



4. Locate the job title of the Posting in your Inbox you wish to take action on. Click on the title.

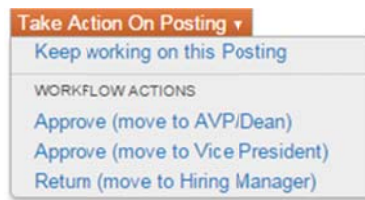


5. You will then be directed to a Summary Page where you can review for accuracy.

6. You may then take action on the Posting by clicking on **Take Action On Posting** .

## Ball State University HR-TMS Training Guide: Service


7. If corrections need to be made to the action, you may return it to the Service Hiring Manager. If not, select the next approval in 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**.

A screenshot of a "Take Action" pop-up window. The window has an orange header bar with the title "Take Action" and a close button. Below the header, the text "Approve (move to AVP/Dean)" is displayed. Underneath, there is a dropdown menu showing "Kate Stoss" with a yellow highlight. Below the dropdown is a text area labeled "Comments (optional)". At the bottom of the window, there is a checkbox with a yellow highlight, labeled "Add this posting to your watch list?". At the very bottom, there are two buttons: "Submit" and "Cancel".

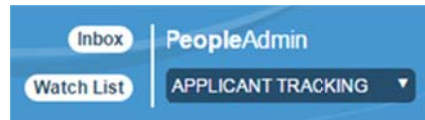
9. If the action was successful, you will see a blue bar indicating the "Posting was successfully transitioned."

 Posting was successfully transitioned

## Applicant Tracking Module

### Viewing Applicants/Changing Applicant Statuses:

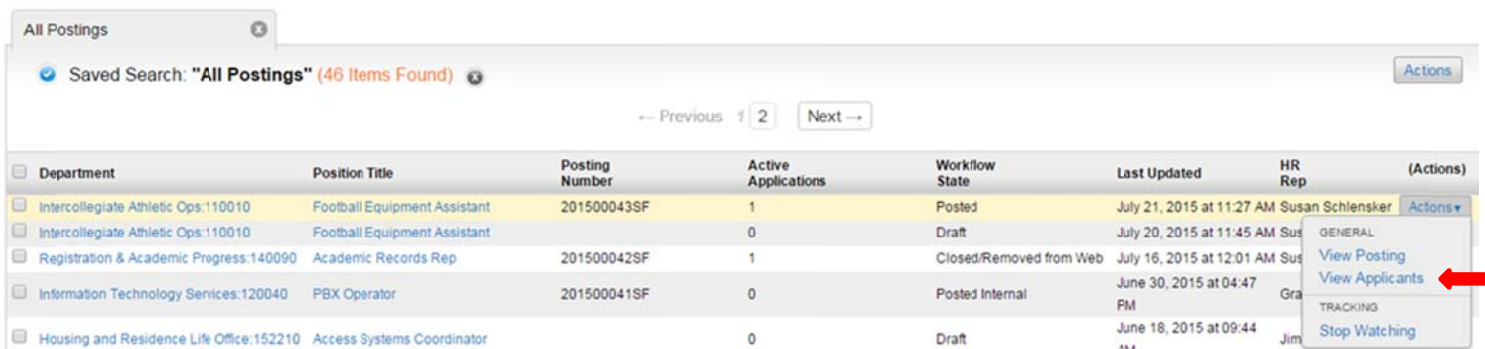
1. Verify you are in the Applicant Tracking module and either the Applicant Reviewer or Search Committee Member user group.



2. Hover over Postings and select Service.



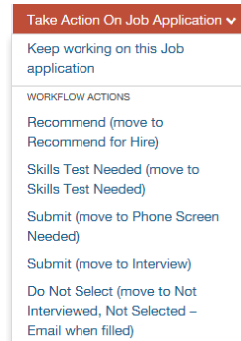
3. Locate the posting and click the Actions menu and choose view applicants.



4. Either click on the applicant's name or click the 'Actions' menu for each application and select View Application.

## Ball State University HR-TMS Training Guide: Service

5. Select Take Action on Job Application and select the state you wish to change the applicant to from the menu.



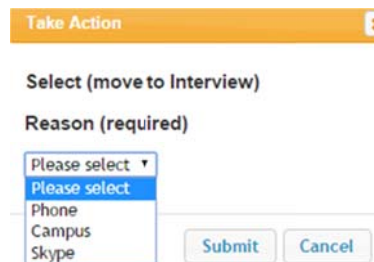
Take Action On Job Application ▼

Keep working on this Job application

WORKFLOW ACTIONS

- Recommend (move to Recommend for Hire)
- Skills Test Needed (move to Skills Test Needed)
- Submit (move to Phone Screen Needed)
- Submit (move to Interview)
- Do Not Select (move to Not Interviewed, Not Selected – Email when filled)

If you choose *Select (move to interview)*, a Take Action pop up window will appear; and you will need to select the appropriate interview type – Phone, Campus, or Skype.



Take Action

Select (move to Interview)

Reason (required)

Please select ▼

Please select

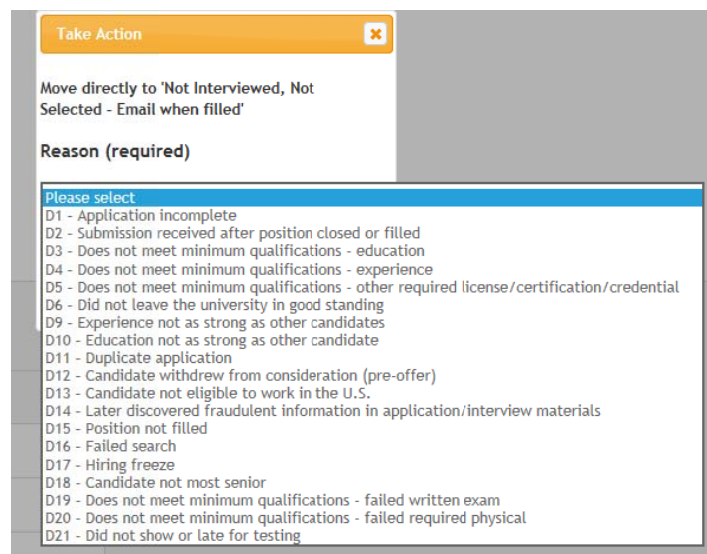
Phone

Campus

Skype

Submit Cancel

If you select *Do Not Select (move to Not Interviewed, Not Selected – Email when filled)*, a Take Action box will pop up; and you will need to select the reason. The drop-down menu button will not show; you can either click where it says *please select* and the reasons will appear or you can click and drag the lower right-hand corner of the box to make the box bigger and the menu button will appear.



Take Action

Move directly to 'Not Interviewed, Not Selected - Email when filled'

Reason (required)

Please select

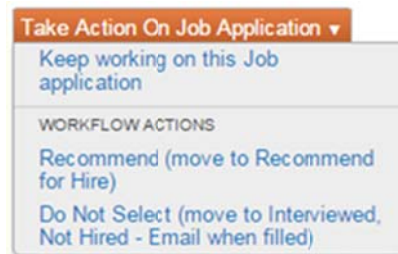
- D1 - Application incomplete
- D2 - Submission received after position closed or filled
- D3 - Does not meet minimum qualifications - education
- D4 - Does not meet minimum qualifications - experience
- D5 - Does not meet minimum qualifications - other required license/certification/credential
- D6 - Did not leave the university in good standing
- D9 - Experience not as strong as other candidates
- D10 - Education not as strong as other candidate
- D11 - Duplicate application
- D12 - Candidate withdrew from consideration (pre-offer)
- D13 - Candidate not eligible to work in the U.S.
- D14 - Later discovered fraudulent information in application/interview materials
- D15 - Position not filled
- D16 - Failed search
- D17 - Hiring freeze
- D18 - Candidate not most senior
- D19 - Does not meet minimum qualifications - failed written exam
- D20 - Does not meet minimum qualifications - failed required physical
- D21 - Did not show or late for testing

6. Make your selection and then confirm by clicking submit in the Take Action pop-up window.



## Ball State University HR-TMS Training Guide: Service

- Continue the steps until all applicants have been reviewed and moved through appropriate workflow actions to update their status. See workflows on pages 34-37 for guidance
- Once an Applicant Reviewer has identified the candidate to hire, select Recommend (move to Recommend for Hire) in the Take action on Job Application drop-down menu. An email will be sent to Human Resources which will initiate the background check. Human Resources will then notify the Service Hiring Manager when the background check is complete and the Hiring Proposal can be entered.



- You can also move candidates in bulk. Make sure the candidates you are moving in bulk are in the same workflow status by using the filter options. Click in the box by each name for the candidates you would like to move. Click on the Actions drop down menu and select Move in Workflow.

The screenshot displays the HR-TMS interface. At the top, there is a job posting for "Operations Manager (Staff)" with details like "Current Status: Closed/Removed from Web", "Position Type: Staff", "Department: Student Ctr:151110", "Created by: Teresa Pryor", and "Owner: Human Resources". Below this, there are tabs for "Summary", "History", "Applicants", "Reports", and "Hiring Proposals". The "Applicants" tab is active, showing a search bar and a table of applicants. The table has columns for "Applicant Last Name", "Applicant First Name", "Requisition Number", "Workflow State (Internal)", "Last Updated", "Ranking Criteria Score", and "Supplemental qu". Two applicants are listed: "Sample" and "Beagle". Both are checked. A red arrow points to the "Workflow State (Internal)" column. Another red arrow points to the "Actions" dropdown menu, which is open and shows options like "Review Screening Question Answers", "Download Screening Question Answers", "Export results", "BULK", "Move in Workflow", "Download Applications as PDF", and "Create Document PDF per Applicant".

Applicant Last Name	Applicant First Name	Requisition Number	Workflow State (Internal)	Last Updated	Ranking Criteria Score	Supplemental qu
<input checked="" type="checkbox"/> Sample	John	201500059SF	Under Review by Department	August 28, 2015 at 11:22 AM -	0.0	
<input checked="" type="checkbox"/> Beagle	Snoopy	201500059SF	Under Review by Department	August 28, 2015 at 11:43 AM -	0.0	

## Ball State University HR-TMS Training Guide: Service

10. You can change all applicants at once by clicking on the drop down button and choosing correct workflow.



Editing: Workflow States for 2 Applicants

---

Change for all applicants

Applicant	Current State	New State	Reason
John Sample	Under Review by Department	<input type="text" value="Select a workflow state..."/>	
Snoopy Beagle	Under Review by Department	<input type="text" value="Select a workflow state..."/>	

11. Or, you can change each applicant individually by clicking on the drop down button and choosing correct workflow.



Editing: Workflow States for 2 Applicants

---

Change for all applicants

Applicant	Current State	New State	Reason
John Sample	Under Review by Department	<input type="text" value="Select a workflow state..."/>	
Snoopy Beagle	Under Review by Department	<input type="text" value="Select a workflow state..."/>	

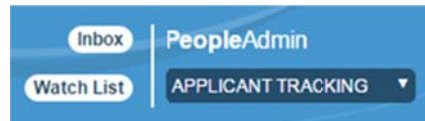
or

12. If the action was successful, you will see a light blue bar indicating the “Application was successfully transitioned.”

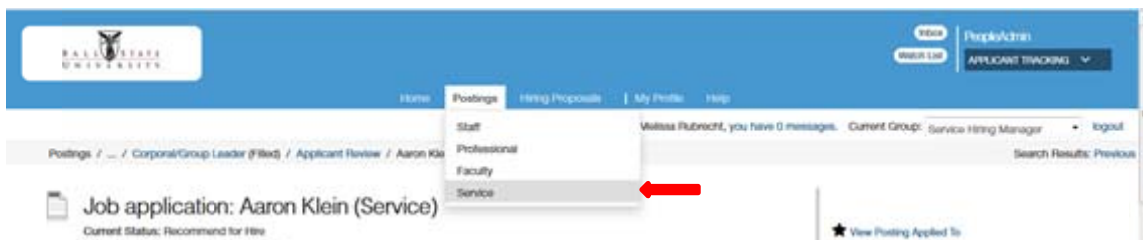
## Applicant Tracking Module

### Creating a Hiring Proposal:

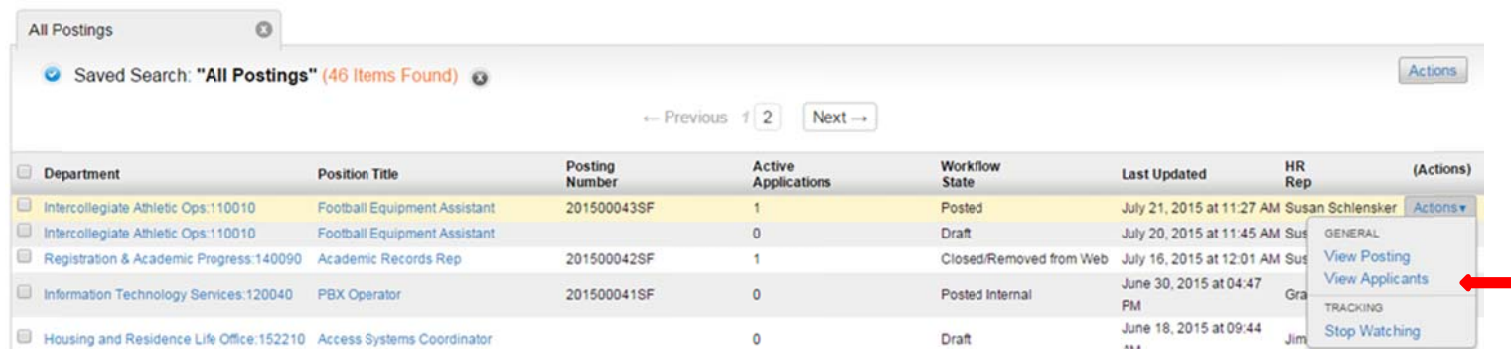
1. Verify you are in the 'Applicant Tracking' module in the Hiring Manager user group and that Human Resources has notified you that the background check is complete and that you may proceed with the hiring proposal.



2. Hover over 'Postings' and select Service.



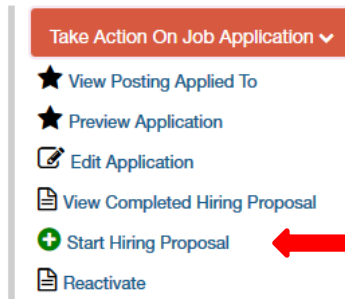
3. Locate the posting and click the 'Actions' menu and choose view applicants.



4. Select applicant you would like to start the hiring proposal for by either clicking on his/her name or using the Actions button at the end of his/her line and selecting View Application. This workflow replaces the New Person Identity Form.

## Ball State University HR-TMS Training Guide: Service

5. Click on Start Hiring Proposal.



6. Position should already be selected; if not, click on the button beside the correct position title/position control number.
7. Then click on [Select Position Description](#).
8. The Hiring Proposal will appear in an editing state so that required fields can be filled in. Click on the applicant's name to review the summary and make edits if needed.

If you don't know the information listed as optional below, Human Resources will update the Hire Information once the candidate has verbally accepted the position.

New Hire Rate – optional – if you know the hourly hire rate, you may enter it here.

2 Year Rate – optional – if you know the hourly rate, you may enter it here.

5 Year Rate – optional – used for grandfathered Custodian rates or Police Officer positions with multiple tiers.

Shift – **required** – use drop-down button to select appropriate shift. Choose the shift where the majority of the employee's shifts start in a given work week. e.g. if 3 shifts during the workweek begin at 2:30 p.m. and 2 shifts begin at 10:30 a.m., the majority of the workweek is on second shift and the second shift premium is applicable for all hours worked.

HR Rep Phone Number – optional – if you know the HR Rep's phone number you may enter it here using the XXX-XXX-XXXX format beginning with area code.

Job Change Reason – **required** – select appropriate job change reason from the using the drop-down button. A promotion is defined as a move to a higher paid position. A transfer is defined as a move to a lateral or lower paid position.

Start Date – **required** – actual first day of work for the selected candidate.

End Date – optional – for use if this is a temporary position.

## Ball State University HR-TMS Training Guide: Service

Justification for Selection of Candidate – **required** – specific reasons for selecting this candidate. If applicable, how does this meet your department's diversity plan?

Employee's Building/Room – optional – enter the building and room number the new employee will be working in.

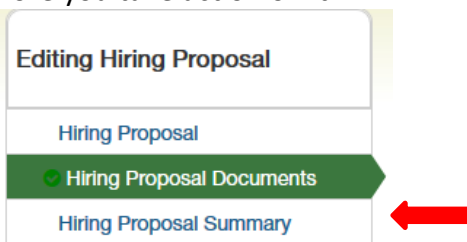
Employee's Phone – optional – enter the telephone number for the new employee.

Supervisor's Position Number – **required** – enter the position number of the person supervising this position.

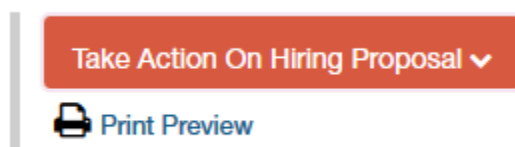
Time Sheet Org – **required** – this is the organization that performs time sheet approval for this position.

Supervisor Certification – **required** - the Chairperson/Administrative Head of the department needs to certify that the work experience, employment, references, and education requirements have been met, as well as indicate if this candidate will be working with minors.

9. Hiring Proposal Documents – optional – this can be used to add any additional documents requested by Human Resources.
10. Comment Field – Add any information needed such as: 10 month v. 12 month assignment; Occupational Group; instructions on where to report first day, etc.
11. Choose "Next"
12. The Hiring Proposal Summary allows you to review the hiring proposal and make any necessary edits before you take action on it.



13. Once all fields have been checked and the required fields completed, click on Take Action On Hiring Proposal.



## Ball State University HR-TMS Training Guide: Service

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You can either keep it at your stage of the workflow if you are waiting on additional information or you can move it to Approve (move to Hire Approved) which moves it on to Human Resources for approval.

1. If you select Approve (move to Hire Approved), 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. Please select the correct HR Representative. 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.
2. If the action was successful, you will see a light blue bar indicating the “Hiring Proposal was successfully transitioned.”

