

HR-TMS

Human Resources -Talent Management System

Training Guide

For Hiring

Professional Employees



**BALL STATE
UNIVERSITY**

WE FLY

University Human Resource Services

February 2020

University Human Resource Services' Talent Management System (HR-TMS) and PeopleAdmin

HR-TMS enhances 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 candidate applications, and hire employees.



The online system, HR-TMS, is hosted by PeopleAdmin, a PowerSchool Company. 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/>).

We are pleased to offer you this step-by-step training manual for hiring Professional employees. Other employee groups – faculty, staff and service - have their own guides.

If you have any questions about this exciting HR online talent management system or need assistance in completing an action in the HR-TMS, please email:

ERP@bsu.edu

Table of Contents

Login Information.....	4
Introduction & Home Page.....	4
Module Type Definitions	5
User Group Definitions	6
Position Management Module.....	7
Core Functions of the Position Management Module	7
Creating a New Position Description (New Position Request)	8
Modifying an Existing Position Description	11
Approving a Position Description Action	13
Applicant Tracking System Module	15
Core Functions of the Applicant Tracking System Module	15
Creating a New Posting.....	16
Posting Details	17
Supplemental Questions	19
Applicant Documents	21
Recruitment Plan.....	21
Guest User	22
Search Committee Members	23
Reference Letter Feature	24
Summary	24
View Job Posting	25
Viewing Applicants/Changing Applicant Statuses	28
Creating a Hiring Proposal	31

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 white “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 blank 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



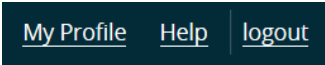
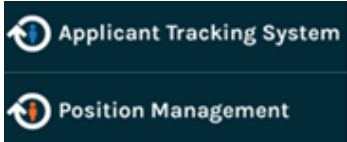
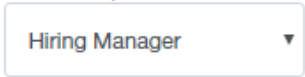
Log In

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


Introduction & Home Page:


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. Next is a detailed list of the Home Page and the functions available:

Ball State University HR-TMS Training Guide: Professional

<u>Functional Area</u>	<u>Location</u>	<u>Definition</u>
 Inbox	TOP of Home Page upon log in	Displays all items requesting your attention (approval/review).
 Watch List	BOTTOM of Home Page upon log in	Displays any requests you are watching (postings, position actions) for easy access.
	Upper Right-hand corner of screen	Used to update your user account details and online help for using the system.
Module Type Selection 	Upper Left -hand corner of screen	Used to toggle between the Position Management and Applicant Tracking modules.
User Group Selection User Group: 	Upper Right -hand corner under your name, My Profile and Help section	Displays the user groups available to you and you can select the user group via the drop-down box.

Watch for the following Icons:

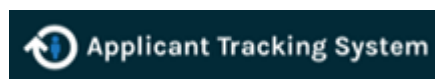
 This icon indicates that there is missing information in a section which must be completed before next action in workflow can be taken.

 This icon indicates a section is complete but will still allow editing in some instances.

Module Type Definitions



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



Used to view Postings, Applicants, and complete Hiring Proposals.

Ball State University HR-TMS Training Guide: Professional

User Group Definitions

Applicant Reviewer: Reviews applicants in the posting and moves applicants forward in the applicant workflow, while applying appropriate disposition codes. This is the only user group that can move applicants in the applicant workflow.

Hiring Manager: Create a new position action or modify position description. Reviews applicants per posting and creates 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.

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.

Provost Budget Director: For Academic Affairs division only, reviews and approves budget information.

EEO: Reviews and approves diversity of pools, diversity of recruitment plans, and may request additional recruitment sources be used.

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

Sponsored Projects Administration (SPA): Reviews and approves grant funded position actions.

Budget: Reviews and approves all position actions for budget confirmation. Forwards action to the AVP-HR user group.

AVP-HR: Approves actions sent from the Budget and/or VP user group. Forwards actions to VP of Business Affairs or HR user group.

VP of Business Affairs: Reviews and approves position actions. Forwards actions to HR user group.

President: Reviews new positions, position requests and hiring proposals that are over budget, or in the President's area. Forwards actions to HR user group.

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

****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 for the Applicant Tracking System module)



To select the position management module, click on the three dots located in the top left 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.

User Group:

Core Functions of the Position Management Module

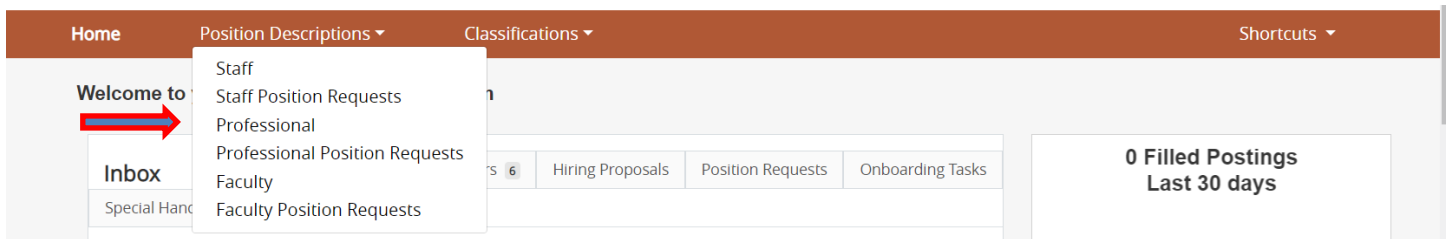
- View, create, or modify your Professional position descriptions
- Obtain the necessary approvals to post a professional position
- Make title, compensation, FOAP, supervisor changes for incumbent
- Access active position description requests

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 click **Professional**.



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](#)

Ball State University HR-TMS Training Guide: Professional

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.

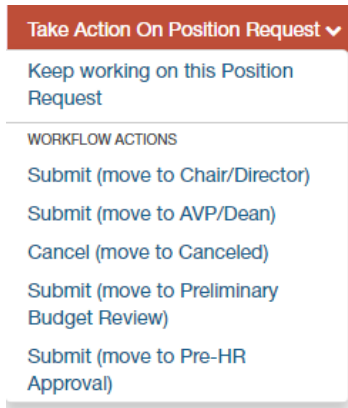
12. The following is a list of the sections within a new position action that will need to be completed. The sections with a check mark next to the section indicate all required fields have been completed.

Editing Position Request

- ☒ **Position Justification**
State justification for new position request. Indicate if this position will be posted and if a search committee will be used. Salary information is required for the position.
- ☒ **Position Details**
Enter position details such as hours per week, position function, essential job duties, education, supervisor, and experience required. 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. Please enter organization title as well as percentage funded.
- ☒ **Supervisory Position**
Select supervisor's position from list.
- ☒ **Position Documents**
Upload any 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.

Ball State University HR-TMS Training Guide: Professional

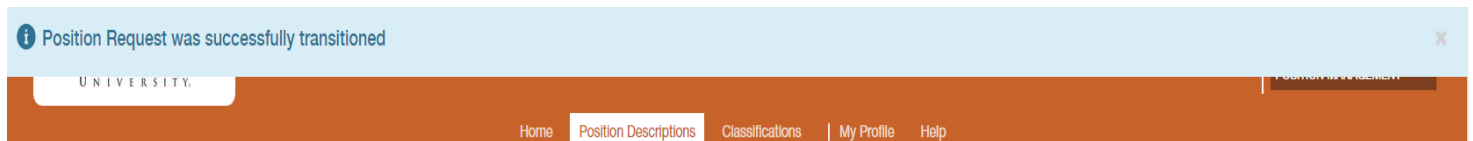
13. To take action, hover over the Take Action on Position Request button at the top right hand corner of the page and select one of the following:



****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.***

To determine where to move the request, please refer to the Professional Workflow Decision Trees which are found on the HR-TMS Home page under My Links (right margin of screen).

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. Comments may be entered before submitting, but please note that comments will be tied to the historical record of this action. If this position is funded by a grant, please include the name of the Grant Manager in your comments. If you want to include the action in your watch list, check that box before clicking **Submit**.
15. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.



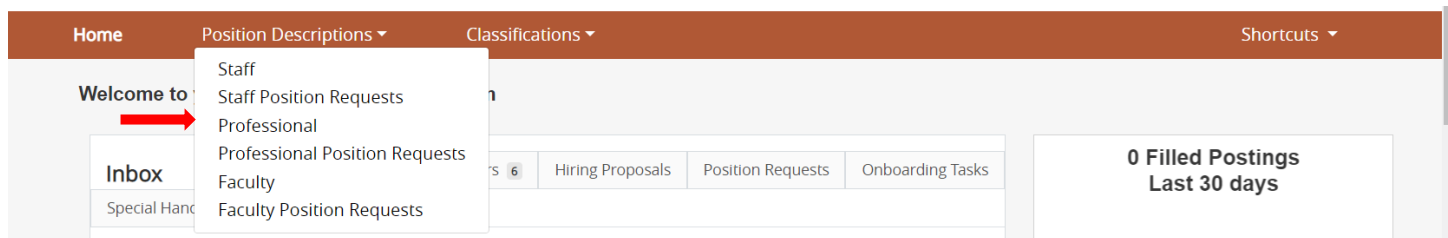
Position Management Module

Modifying an Existing Position Description:

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



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



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.

Ball State University HR-TMS Training Guide: Professional

Editing Position Request

- Position Justification**: Enter the reason for position modification and if posting the position, enter information in the Justification field. Indicate if this position will be posted, if a search committee will be used, and salary information if creating a posting.
- Request Changes for Current Position**: Enter any changes being made to a current employee's position - replaces the P-3.
- Position Details**: Update position details, such as hours per week, position function, essential job duties, education, supervisor, and experience required.
- FOAP Details**: Identify funding sources for this position. Grant funding is also identified in this section. Please enter organization title as well as percentage funded.
- Employee**: 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.
- 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, review for accuracy all of the information you entered into the request or make additional edits if necessary.

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

Take Action On Position Request

- Keep working on this Position Request
- WORKFLOW ACTIONS
- Submit (move to Chair/Director)
- Submit (move to AVP/Dean)
- Cancel (move to Canceled)
- Submit (move to Preliminary Budget Review)
- Submit (move to Pre-HR Approval)

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.

7. 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. Comments may be entered before submitting, but please note comments will be tied to the historical record of this action. If this position is funded by a grant, please include the name of the Grant Manager in your comments. If you want to include the action on your watch list, check that box before clicking **Submit**.
8. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.

Ball State University HR-TMS Training Guide: Professional

Position Request was successfully transitioned



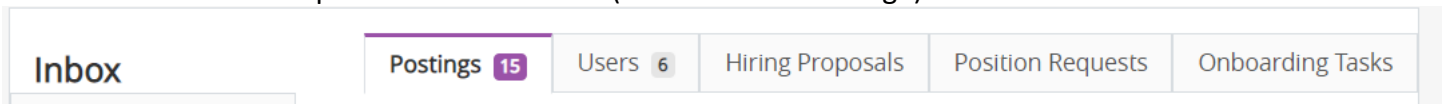
Position Management Module

Approving a Position Description Action:

1. Verify that you are in the correct user group for approval.



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

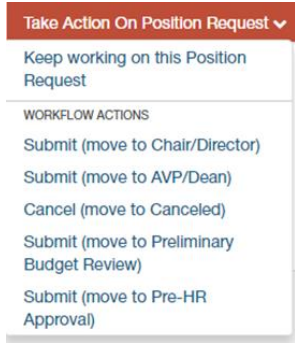


3. Locate the title of the Position Description in your Inbox you wish to take action on. Click on the title.
4. You will then be directed to a Summary Page where you can review for accuracy.
5. Remember if it indicates in the Posting Information of the Position Justification section that this position will be posted, your approval of the position description is also your approval to post this position. See below.

Posting Information	
If you are requesting to post the position, please indicate below and carefully review the salary information. The proposed pay range minimum and maximum will be used for the posting. If you are requesting to post the position, Human Resources will initiate the posting request once the position description is approved.	
Will this position be posted as soon as the position description is approved?	
Will a search committee be used?	

6. Take action on the Position Request by clicking on Take Action on Position Request. If corrections need to be made to the action, you can edit the position request or you can send it back to appropriate user group by selecting Return (move to ...).


Ball State University HR-TMS Training Guide: Professional



The screenshot shows a dropdown menu titled "Take Action On Position Request" with a downward arrow. Below the title, the option "Keep working on this Position Request" is selected. Underneath, a section labeled "WORKFLOW ACTIONS" lists several options: "Submit (move to Chair/Director)", "Submit (move to AVP/Dean)", "Cancel (move to Canceled)", "Submit (move to Preliminary Budget Review)", and "Submit (move to Pre-HR Approval)".

****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.***

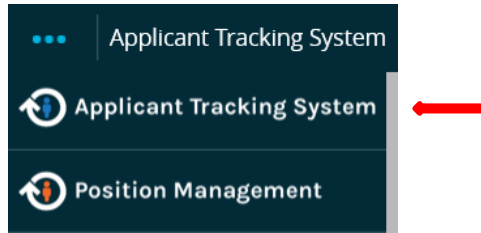
7. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. Comments may be entered before submitting, but please note comments will be tied to the historical record of this action. If you want to include the action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

 Position Request was successfully transitioned



Applicant Tracking System Module

(Blue background – changes to orange for the Position Management module)



To select the Applicant Tracking System module, click on the three blue dots located in the top left corner of the home page and select Applicant Tracking System.

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

User Group:

Hiring Manager ▼

Core Functions of the Applicant Tracking System Module:

1. Review, complete and submit a posting for recruitment
2. View job postings and applicant materials
3. Create Hiring Proposals

Applicant Tracking System Module

Creating a New Posting

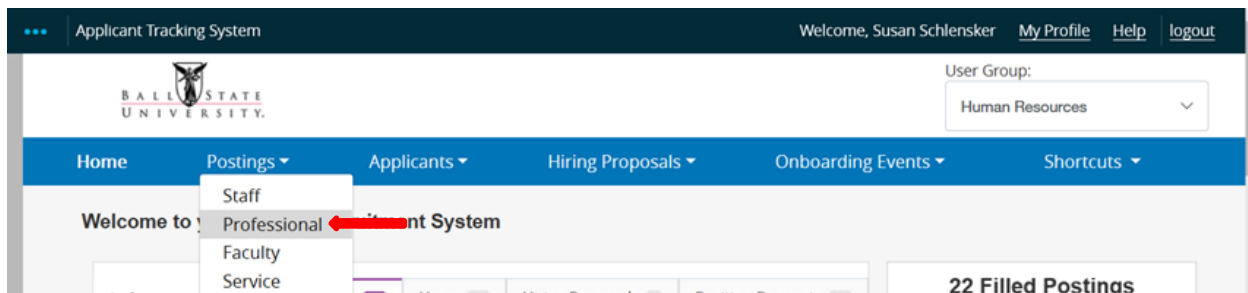
1. Verify you are in the Applicant Tracking System module as a Hiring Manager.



User Group:

Hiring Manager

2. Hover over Postings and click **Professional**.
- 3.



+ Create New Posting

4. On the right side of the page, click on
5. You will see the following window appear:

Create New ✕

What would you like to use to create this new posting?

Create from Posting
Uses an existing posting as a template and automatically copies in most information.

Create from Position Description
Copies in most of the information from a position description.

You should select “Create from Position Description”, as this will populate the information into the posting from the position request that was just updated. The “Create from Posting” option is seldom used. An example of using this option would be a recently failed professional search where you would like to post it again a position modification does not have to go through the workflow for approvals. Another posting can be created that will be identical to the prior posting.

6. Each of the posting sections are described in detail on the following pages.

Editing Posting

Posting Details

✓ Supplemental Questions

✓ Applicant Documents

✓ Recruitment Plan

✓ Guest User

✓ Search Committee

✓ Reference Letter Feature

Summary

Hiring Manager must complete and review information, duties and responsibilities, and posting detail information

Optional screening questions candidates will be asked when they apply for the position.

This section allows you to select which documents will be required to be uploaded with application.

This section allows you to select additional recruitment sources to attract a diverse and talented pool of applicants.

Gives guests outside of the university access to view the posting.

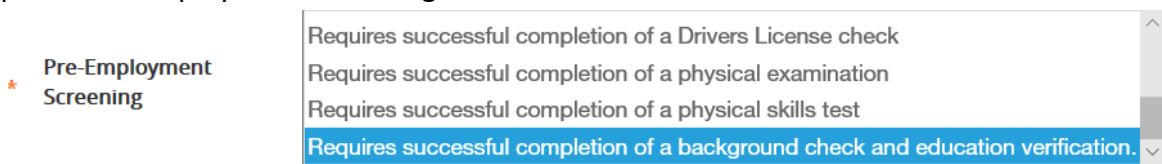
Allows you to assign search committee members to the posting.

This allows you to set specifications on any references you want applicants to submit as part of their application.

On the Posting Summary page, prior to taking action, you will review for accuracy all of the information in the posting request or make additional edits if necessary.

Posting Details

1. **Posting Information Section:** 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. Position Title, Position Function, Minimum Education/ Experience/Other, Preferred Education/ Experience/Other, Positions Supervised, EEO Statement and Duties and Responsibilities are not editable. If you would like to edit any of these fields at this point, please contact your HR Partner. Please note: you may need to select more than one option in the required Pre-Employment Screening Box.



The screenshot shows a dropdown menu for the 'Pre-Employment Screening' field. The menu is open, displaying four options: 'Requires successful completion of a Drivers License check', 'Requires successful completion of a physical examination', 'Requires successful completion of a physical skills test', and 'Requires successful completion of a background check and education verification.' The last option is highlighted in blue. The dropdown has a scroll bar on the right side.

2. **Posting Detail Information Section:**

Number of Vacancies – number of vacancies for this position – will usually be one (1) unless you have multiple position requests that are identical that have been approved, so that you can have one posting with multiple vacancies.

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.

Hiring Manager – person who will be entering the hiring proposal. Type in last name and select from list.

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

Number of Calendar Days that Applications will be accepted – select number of days you would like posting to remain open. There is a minimum of 14 days and a maximum of 90 days.

Open Date – This is the preferred date to post the position.

Applications Accepted Through Date - date that you wish the position to be closed automatically.

Special Instructions Summary – Optional specific instructions help the applicant fully complete his/her application.

Ball State University HR-TMS Training Guide: Professional

Quick Link for Internal Posting – link to the posting in the applicant portal if this will be an internal posting (A waiver for an internal posting must be requested.)

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.

Do You Plan to use a Search Committee for this Search – select either yes or no.

Supplemental Questions

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

Add a question

Included Supplemental Questions

Position	Required	Category	Question	Status
<input type="checkbox"/>	Education		Do you have an associate's degree or two years of college or have you successfully completed Indiana Law Enforcement Basic Training or equivalent approved by Indiana Law Enforcement Training Board?	
<input type="checkbox"/>	Education		Do you have a bachelor's degree or equivalent in criminal justice or related field or have you successfully completed Indiana Law Enforcement Basic Training or equivalent approved by Indiana Law Enforcement Training Board?	
<input type="checkbox"/>	Education		If yes, please list your major:	
<input type="checkbox"/>	Education		What is your highest degree?	

2. 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. A new Add a Question box will pop up.

Ball State University HR-TMS Training Guide: Professional

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.

Name *

Status *

pending ▾

Category

Please select a category ▾

Question *

Possible Answers

☒ Open Ended Answers

☐ Predefined Answers

3. Create a name for the question (e.g. Professional – Degree, Professional – Certification). Choose a name that describes the question and/or uses terminology that might be used when conducting a search for a specific question.
4. Select a category for your question from the drop down list (Education, Experience, or Other).
5. Enter the question you would like to use in the Question text box.
6. You will need to select which type of answer will be needed for your question:

Possible Answers

☒ Open Ended Answers

☐ Predefined Answers

7. Open ended answers allow the applicants to respond with whatever answers they choose.
8. 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.

Possible Answers

☐ Open Ended Answers

☒ Predefined Answers

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

Possible Answer 1: ✕

Possible Answer 2: ✕

9. Once you have selected the supplemental questions you would like to ask, click on submit.
10. In order to make sure the supplemental question is required, you must select the required box.

Ball State University HR-TMS Training Guide: Professional

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 will submit with the application. Select the “Required” category for any documents that you require. (A cover letter and resume should always be required.) Select the “Optional” category for any documents that would be optional.

Applicant Documents

Select the documents to be required with this item, and those that may optionally be attached. |

Order	Name	Not Used	Optional	Required
1	Resume	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2	Undergraduate Transcripts	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3	Cover Letter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4	Master's Transcripts	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5	Doctorate Transcripts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Curriculum Vitae	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Letter of Recommendation 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Letter of Recommendation 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Recruitment Plan

University Human Resource Services has negotiated advertising packages with a number of value-added sites, where your ads will automatically be placed. You have the option to request additional placements in the discipline specific/other section of this form. If you list discipline specific or other sites, please provide details such as the website address and the format of the ad.

1. To add a discipline specific/other source, click on the “Add Discipline-Specific/Other Sources Entry” button.




2. Enter the name of the source, as well as details regarding the web address and formatting of the ad. Please indicate if it is a diversity recruitment source by selecting “yes” or “no” using the drop-down menu.

Ball State University HR-TMS Training Guide: Professional

Discipline-Specific/Other Sources

Source

Is this a Diversity Recruitment Source? 

☐ Remove Entry?

[Add Discipline-Specific/Other Sources Entry](#)

3. Please indicate any other department listservs or email burst placed by department. To do this, click on the “Add Other Department-Initiated Listservs or Email Bursts Placed by Department” button.


Other Department-Initiated Listservs or Email Bursts Placed by Department

 [Add Other Department-Initiated Listservs or Email Bursts Placed by Department Entry](#)

4. Enter the name of the source and indicate if it is a diversity recruitment source by selecting “yes” or “no” using the drop-down menu.

Other Department-Initiated Listservs or Email Bursts Placed by Department

Source

Is this a Diversity Recruitment Source? 

☐ Remove Entry?

[Add Other Department-Initiated Listservs or Email Bursts Placed by Department Entry](#)

Guest User

The Guest User feature is intended for those individuals who are **not an employee 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.

Ball State University HR-TMS Training Guide: Professional

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](#)

Search Committee Members

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

1. To add search committee members, you may search for someone in the database searching after

selecting

[Add Existing User](#)

*Only employees who have been **previously** assigned to a search committee on a posting in TMS will be available in the search.

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

Ball State University HR-TMS Training Guide: Professional

Last Name	First Name	Email	Department	Committee Chair	(Actions)
Schlensker	Susan	SLSCHLENSKER@BSU.EDU	Ball State University	<input type="checkbox"/>	Add Member

3. If the employee will also serve as the Committee Chair, you can select the checkbox next to the Add Member button.
4. If you are unable to find an employee name to assign search committee member permissions, the employee has never been assigned as a search committee member in TMS before. You will need to request initial permissions from IT. Instructions can be found at: <https://www.bsu.edu/-/media/www/departmentalcontent/human%20resources/pdfs/hr%20forms/requesting%20roles%20in%20tms%20or%20epaf%20access%20dec%202019.pdf?la=en&hash=8A4623D23FD60BE095226AB9FC31064D0179D6E1>

Automatic Reference Letter Request Feature

HR-TMS has the functionality to automatically solicit letters of recommendation from individuals whose contact information is provided by the applicant in the Professional Reference section of the application. If you would like to take advantage of this functionality, please contact your HR Partner, who will explain the process and configure the setting in the posting.

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

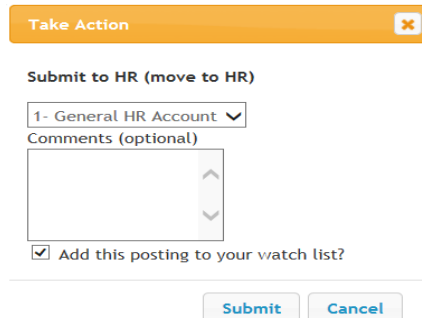
Cancel (move to Canceled)

Submit to HR (move to HR)


**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.*

Ball State University HR-TMS Training Guide: Professional

- You will receive a pop up window 'Take Action' which will send an email in Outlook to the approver in HR that you have selected to notify them they have an action pending. **Please select your HR Partner instead of the General HR Account shown in the drop box below.** Note: comments will be tied to the historical record of this action. Check the box to include the action on your watch list and then click Submit.



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

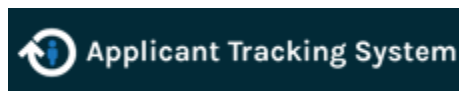
 Position Request was successfully transitioned



Applicant Tracking System Module

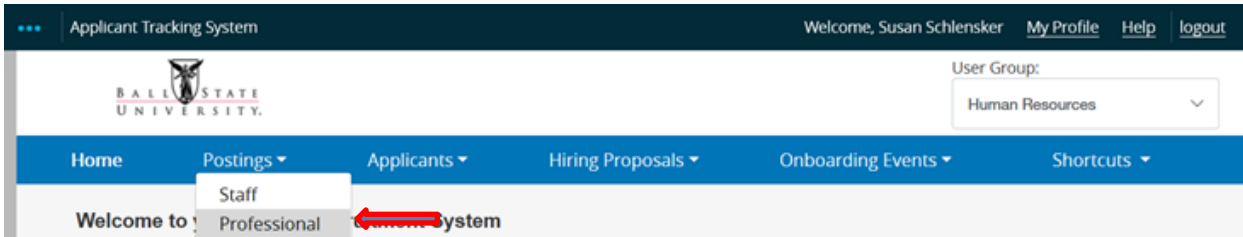
View Job Posting:

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

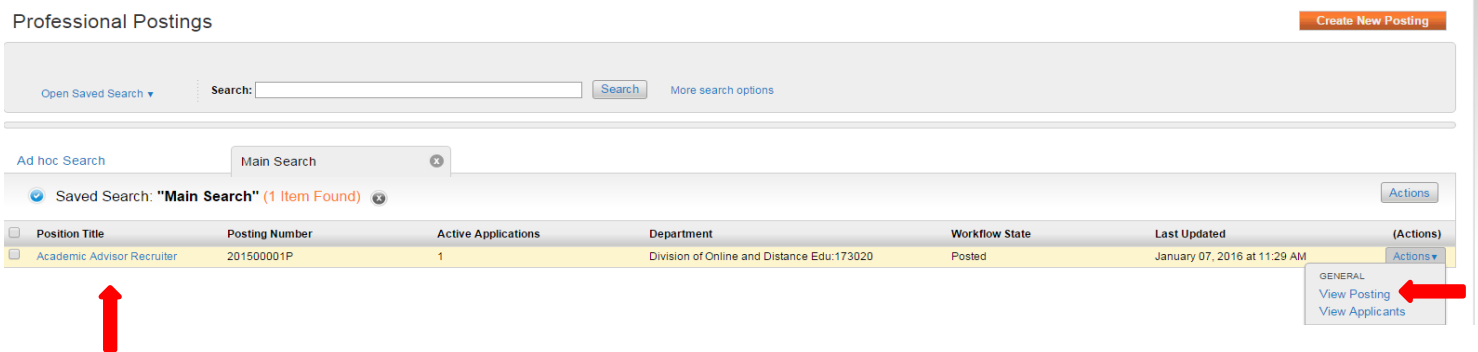


- Hover over Postings and select **Professional**.

Ball State University HR-TMS Training Guide: Professional



- You have two options to view the posting. You can either click on the blue position title or you can click on the blue Actions drop-down menu on the right-hand side of the posting line and select View Posting.



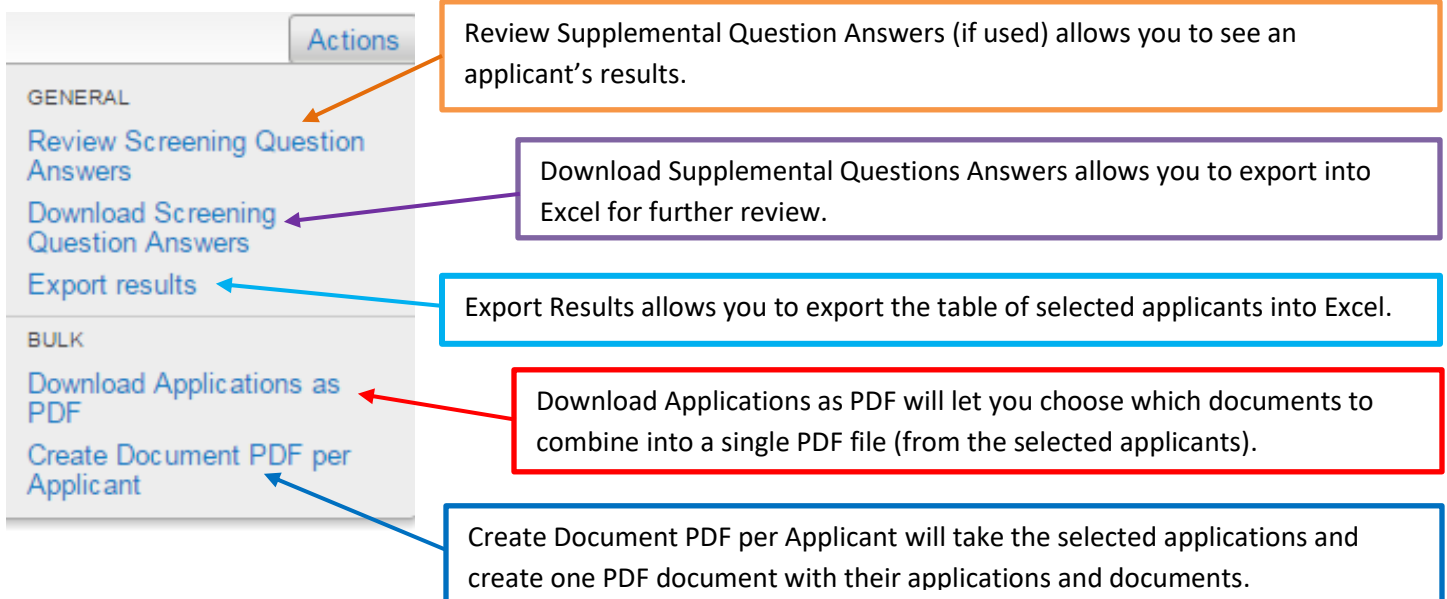
- The following tabs are available with additional information associated with your posting: Summary, History, Settings, Applicants, Reports, Hiring Proposals, and Associated Position Description.



Summary Tab – Shows a summary of the posting.

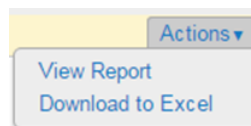
History Tab – Shows a history of the actions taken on the posting.

Applicants Tab - Click the Actions button on the right-hand side of the Applicants tab for more applicant review options.



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

Once the report has run, 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.



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

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

Ball State University HR-TMS Training Guide: Professional

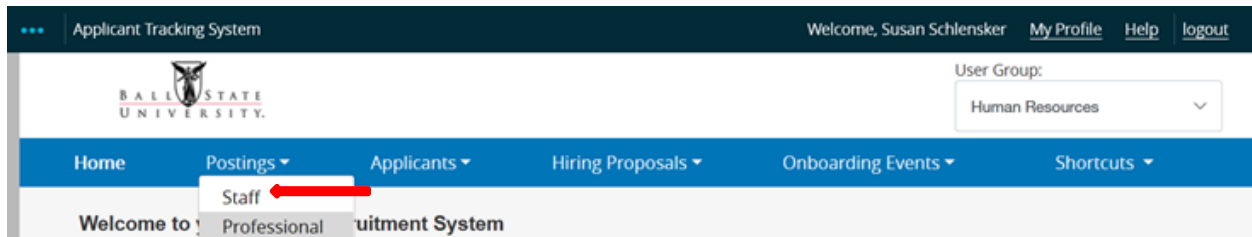
Applicant Tracking System Module

Viewing Applicants/Changing Applicant Statuses:

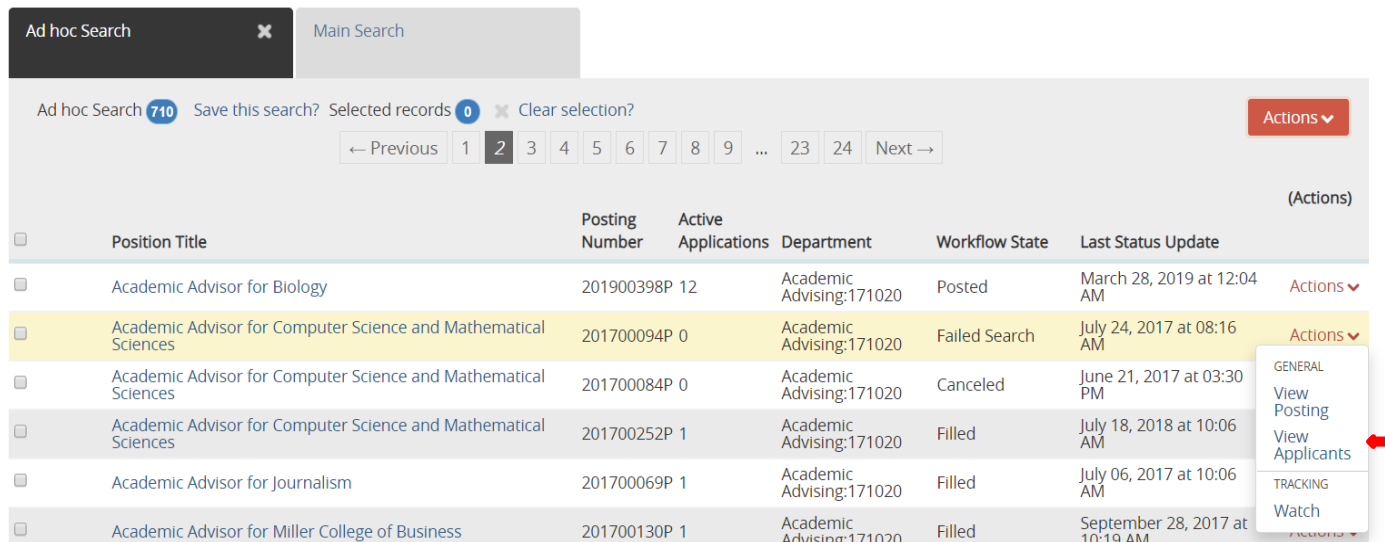
1. Verify you are in the Applicant Tracking System module and either the Applicant Reviewer or Search Committee Member user group.



2. Hover over Postings and select Professional.

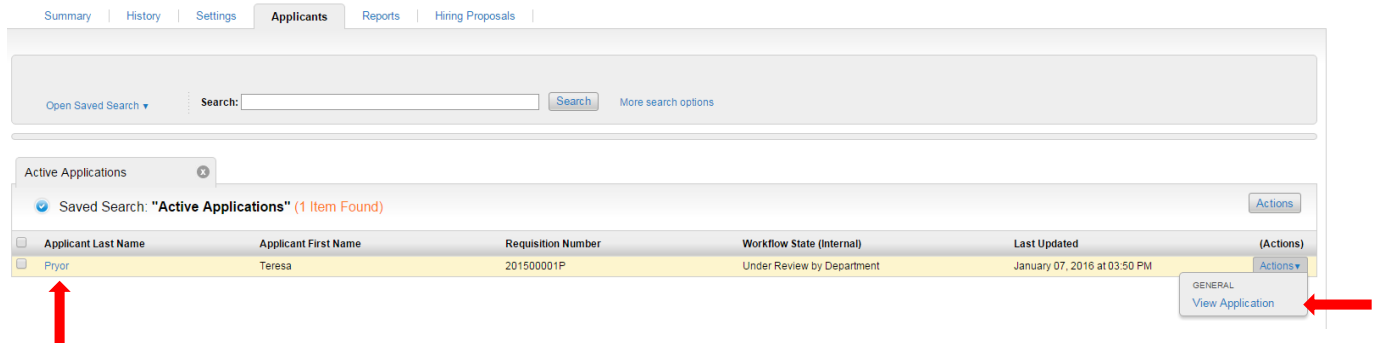


3. Locate the posting and click the Actions menu and choose View Applicants.

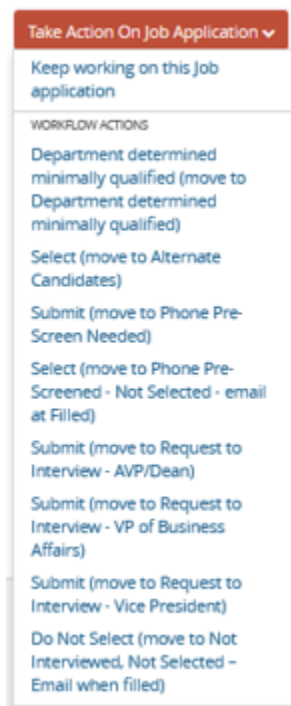


4. Either click on the applicant's last name **OR** click the 'Actions' menu for each application and select View Application.

Ball State University HR-TMS Training Guide: Professional



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



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

Take Action

Do Not Select (move 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 candidates
- 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 - Retiree - not eligible for benefited positions
- D19 - Unable to verify/unsatisfactory references
- D20 - Non-BSU employee applicant, not eligible for internal posting

Continue the steps until all applicants you are not interviewing have been moved through appropriate workflow actions to update their status. See workflows on pages 40-45 for guidance.

Moving Applicants into Request to Interview workflow:

You will select either “Request to Interview – AVP/Dean”, or if you do not have an approver in this role, move to “Request to Interview – Vice President” or if you are in Business Affairs, “Request to Interview – VP of Business Affairs”. Your HR Partner will review each applicant’s qualifications to verify their eligibility for interview. EEO will review the applicant pool and move the applicant into Approved for Interview.

- Once you have identified the applicant to hire from those who have been approved for interview and extended a verbal offer contingent upon the results of the background checks, select *Recommend (move to Recommend for Hire)* in the Take action on Job Application menu. Human Resources which will initiate the background checks. The Hiring Proposal may be created at this time.

Take Action On Job Application

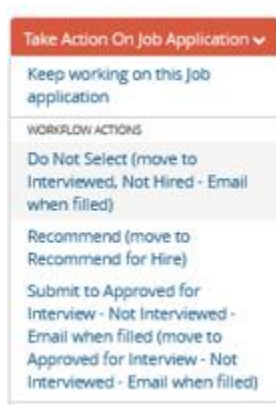
Keep working on this Job application

WORKFLOW ACTIONS

- Do Not Select (move to Interviewed, Not Hired - Email when filled)
- Recommend (move to Recommend for Hire)
- Submit to Approved for Interview - Not Interviewed - Email when filled (move to Approved for Interview - Not Interviewed - Email when filled)

Ball State University HR-TMS Training Guide: Professional

7. Move remaining applicants who were interviewed, but not selected into the Do Not Select (move to Interviewed, Not Hired – Email when filled) by clicking on the orange Take Action on Job Application drop-down menu.



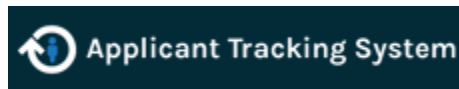
8. If the action was successful, you will see a blue bar indicating the “Application was successfully transitioned.”



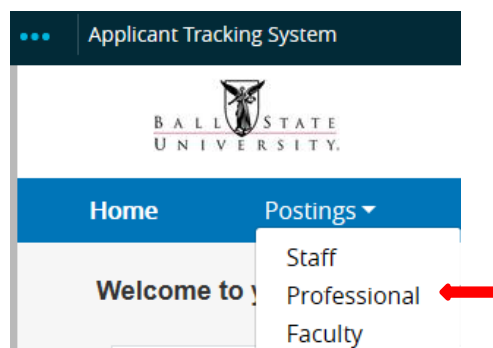
Applicant Tracking Module

Creating a New Hiring Proposal:

1. Verify you are in the ‘Applicant Tracking’ module in the Hiring Manager user group.

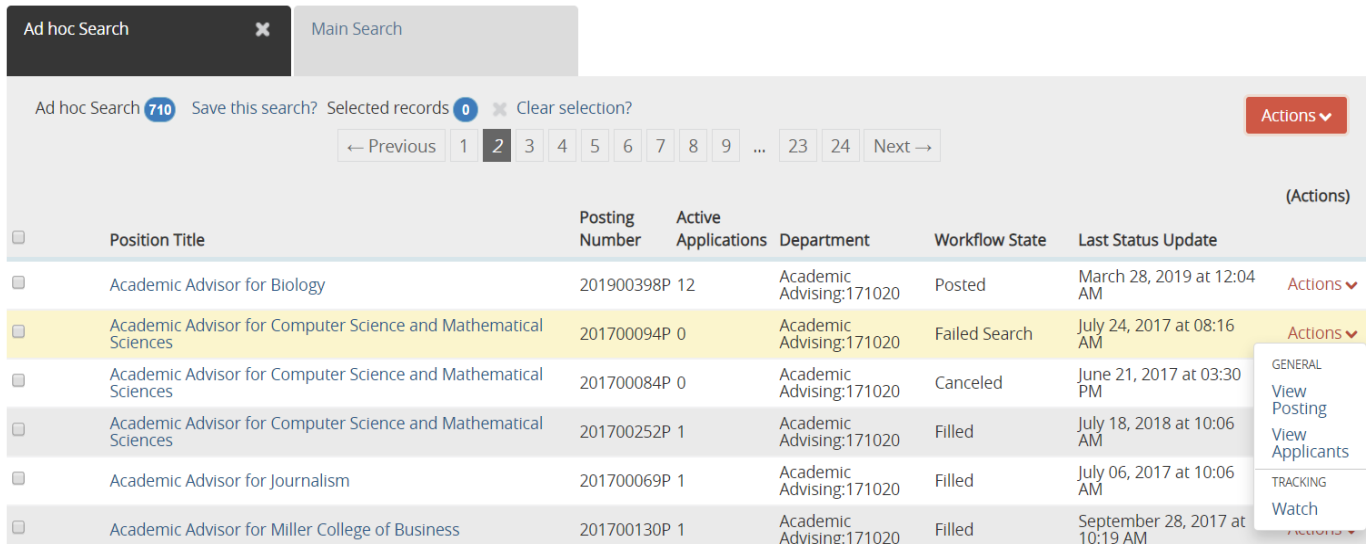


2. Hover over ‘Postings’ and select Professional.



Ball State University HR-TMS Training Guide: Professional

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

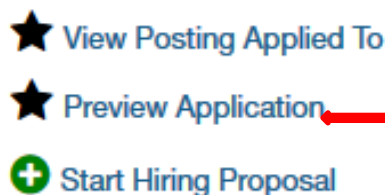


Ad hoc Search 710 Save this search? Selected records 0 Clear selection?

← Previous 1 2 3 4 5 6 7 8 9 ... 23 24 Next →

	Position Title	Posting Number	Active Applications	Department	Workflow State	Last Status Update	(Actions)
<input type="checkbox"/>	Academic Advisor for Biology	201900398P	12	Academic Advising:171020	Posted	March 28, 2019 at 12:04 AM	Actions
<input type="checkbox"/>	Academic Advisor for Computer Science and Mathematical Sciences	201700094P	0	Academic Advising:171020	Failed Search	July 24, 2017 at 08:16 AM	Actions
<input type="checkbox"/>	Academic Advisor for Computer Science and Mathematical Sciences	201700084P	0	Academic Advising:171020	Canceled	June 21, 2017 at 03:30 PM	GENERAL View Posting View Applicants TRACKING Watch
<input type="checkbox"/>	Academic Advisor for Computer Science and Mathematical Sciences	201700252P	1	Academic Advising:171020	Filled	July 18, 2018 at 10:06 AM	
<input type="checkbox"/>	Academic Advisor for Journalism	201700069P	1	Academic Advising:171020	Filled	July 06, 2017 at 10:06 AM	
<input type="checkbox"/>	Academic Advisor for Miller College of Business	201700130P	1	Academic Advising:171020	Filled	September 28, 2017 at 10:19 AM	

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.
5. Click on Start Hiring Proposal.



6. Position should already be selected; if not, click on the button beside the correct position title.
7. Click [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.

Employee ID – optional - if selected candidate is a current employee and you have their BSU ID number, you can enter it here.

Ball State University HR-TMS Training Guide: Professional

Highest Degree Obtained – enter highest degree earned by selected candidate.

Base Annual Salary – **required** – enter the base annual salary.

Job Change Reason – **required** – select appropriate job change reason from the drop-down menu.

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

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

Justification for Selection of Candidate – **required** – provide detail as to why candidate is uniquely qualified for this position.

Employee's Building/Room – **required** – if you do not know the building and room number for the employee, enter alternate information that you may have changed later.

Employee's Phone – **required** - if you do not know the telephone number for the new employee, enter alternate information that you may have changed later.

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

Time Sheet Org – **required** – the organization number 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.

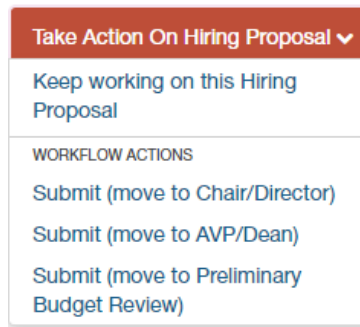
9. Hiring Proposal Documents – optional – can be used if there has been A FOAP change since the position was posted or for any additional information that subsequent approvers should know. To attach a document, click on the Actions button and select appropriate action.

The screenshot displays the 'Hiring Proposal Documents' section of the HR-TMS system. On the left, a sidebar shows the navigation menu with 'Hiring Proposal Documents' selected. The main content area has a header with 'Hiring Proposal Documents' and buttons for 'Save', '<< Prev', and 'Next >>'. Below the header, there is a text block stating: 'Documents do not have to be attached, but if there has been a change to the FOAP on this position since the search began please include that information under FOAP Changes. Also, if there is additional information that subsequent approvers should know that can be included under Other. PDF conversion must be completed for the document to be valid when applicable.' Below this text is a table with the following columns: 'Document Type', 'Name', 'Status', and '(Actions)'. The table has two rows: 'FOAP Changes' (highlighted in yellow) and 'Other'. The 'Actions' dropdown menu is open for the 'FOAP Changes' row, showing options: 'Upload New', 'Create New', and 'Choose Existing'. A red arrow points to the 'Actions' dropdown menu.

10. The Hiring Proposal Summary allows you to review the hiring proposal and make any necessary edits before you take action on it. Once all fields have been checked and the required fields completed, click on Take Action On Hiring Proposal. You can either keep it at your stage of the workflow if you are

Ball State University HR-TMS Training Guide: Professional

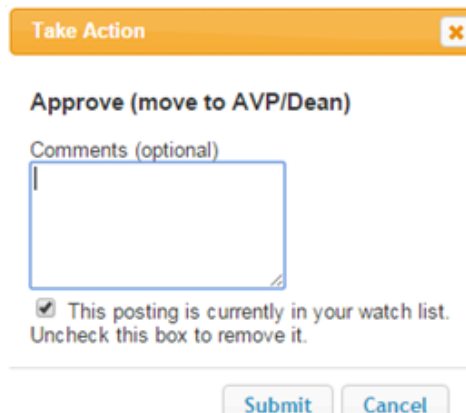
waiting on additional information or you can move it to the next workflow state for approval.



A dropdown menu titled "Take Action On Hiring Proposal" with a downward arrow. The menu contains the following options:

- Keep working on this Hiring Proposal
- WORKFLOW ACTIONS
- Submit (move to Chair/Director)
- Submit (move to AVP/Dean)
- Submit (move to Preliminary Budget Review)

11. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify him/her an action is pending. Please note, comments will be tied to the historical record of this action. Check the box to include the action on your watch list and then click Submit.



A "Take Action" pop-up window with a close button (X) in the top right corner. The window contains the following elements:

- Title: **Approve (move to AVP/Dean)**
- Text: **Comments (optional)**
- A text input box for comments.
- A checkbox labeled "This posting is currently in your watch list. Uncheck this box to remove it."
- Buttons: **Submit** and **Cancel**

12. If the action was successful, you will see a blue bar indicating the "Hiring Proposal was successfully transitioned."

