HR-TMS

Human Resources -Talent Management System

Training Guide

For Hiring

Staff Employees

University Human Resource Services

April 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 Staff employees. Other employee groups – faculty, professional 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:

ERPHR@bsu.edu

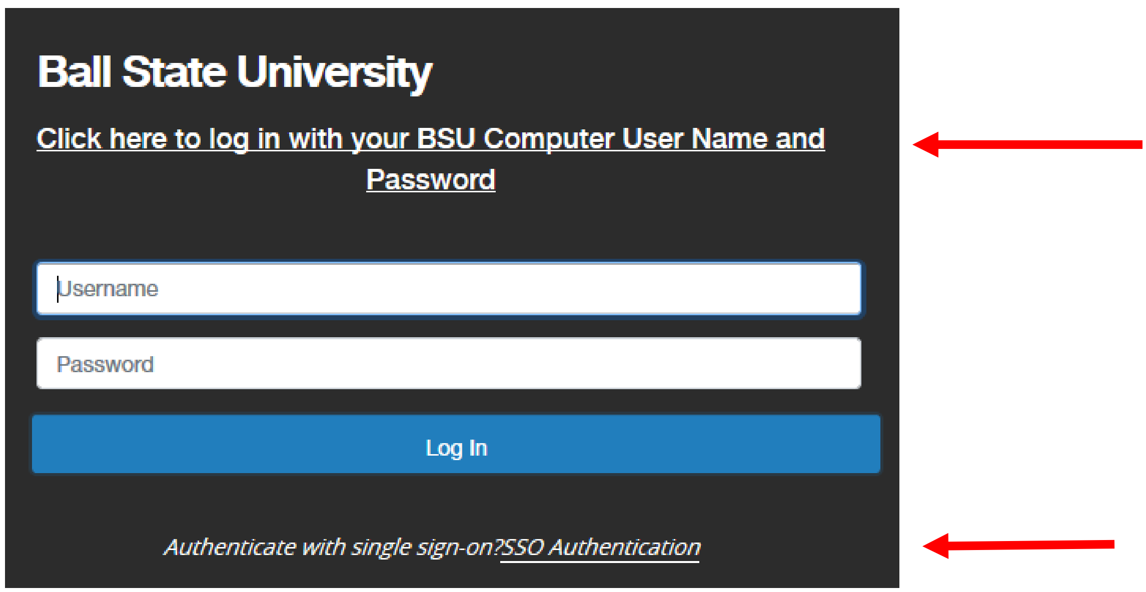
Table of Contents

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.



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:

Functional Area	Location	Definition
Inbox	**TOP** of Home Page upon log in	Displays all items requesting your attention (approval/review).
Watch List	**BOTTOM** half of Home Page upon log in	Displays any requests you are watching (postings, position actions) for easy access.
My Profile Help logout	**Upper Right-hand corner** of screen	Used to update your user account details and online help for using the system.
Module Type Selection Applicant Tracking System Position Management	Upper **Left**-hand corner of screen	Used to toggle between the Position Management and Applicant Tracking modules.
User Group Selection User Group: Hiring Manager	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.

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.

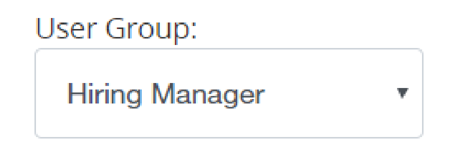
****Please note:** **Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions. Position action can include: initiating a posting form, creating or modifying a position description, or approving a position and/or hiring proposal.**

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.



Core Functions of the Position Management Module

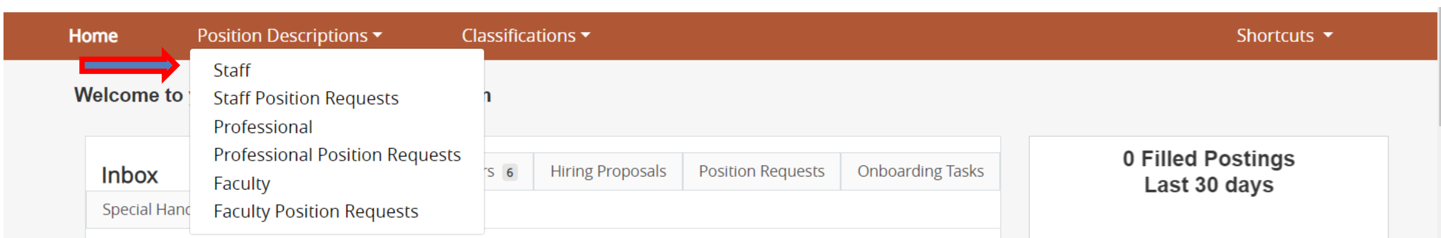
- View, create, or modify your Staff position descriptions
- Obtain the necessary approvals to post a Staff position
- Make title, compensation, FOAP, supervisor changes for incumbent
- Access active position description requests

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 **Staff.**



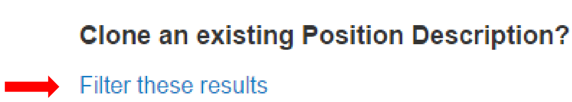
3. Click the  button at the top right corner.

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

5. Enter the proposed Position Title.

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

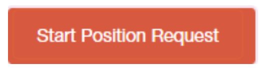
7. If you have an existing position description within your department(s) you wish to copy or 'clone,' click on "Filter these results." You can search for the position description you would like to clone by searching on a title, position number, or department and then clicking on Search.



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
○	Academic Records Representative	102272
◉	Academic Resource and Course Coordinator	102359
○	Academic Services Coordinator	102441

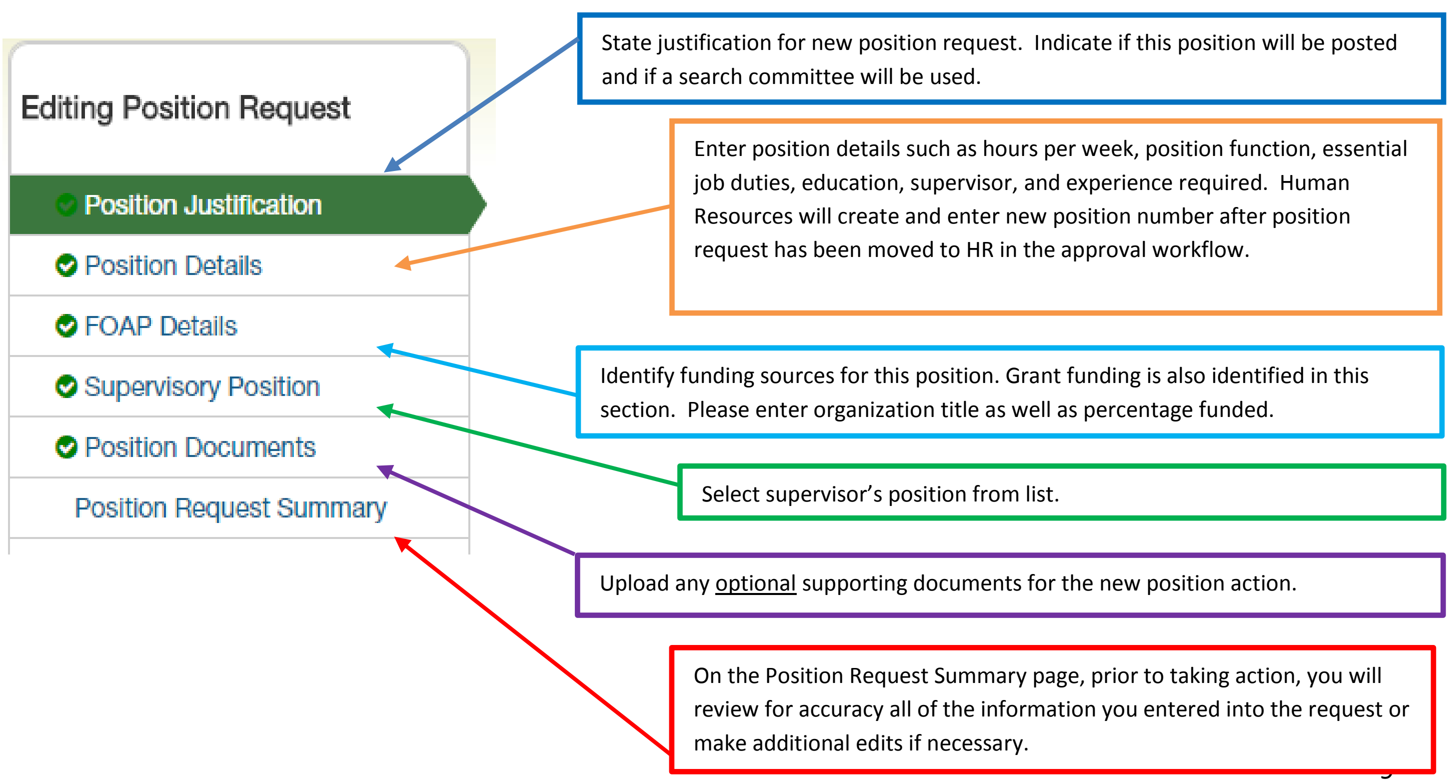
9. Click the **Start Position Request** button.



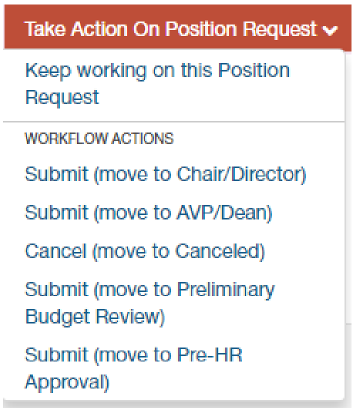
10. This will pull in pertinent information from the 'cloned' position description into this action and allow for edits.

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.



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:

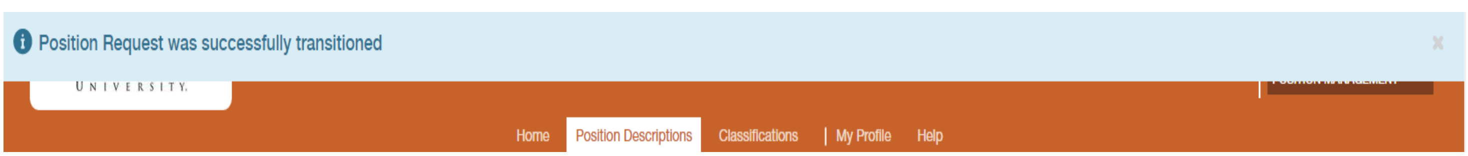


Please note, to save this request and submit later, please select 'Keep working on this Position Request.' If there are additional approvers within the department, you will need to select the appropriate action per the workflow.

To determine where to move the request, please refer to the Staff 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.

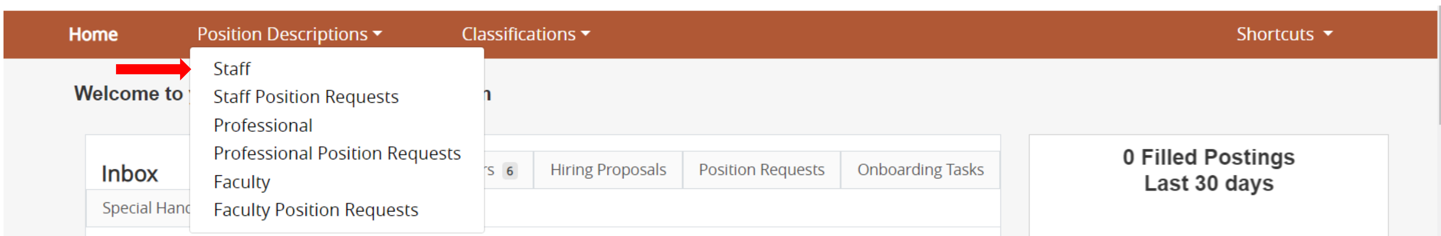


Position Management Module

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 **Staff.**



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.

Enter the reason for position modification and if posting the position, enter information in the Justification field. Indicate if this position will be posted and if a search committee will be used.

Enter any changes being made to a current employee's position.

Update position details, such as hours per week, position function, essential job duties, education, supervisor, and experience required.

Identify funding sources for this position. Grant funding is also identified in this section. Please enter organization title as well as percentage funded.

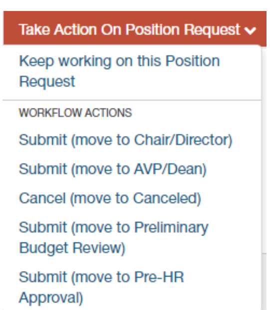
If you are preparing the position description for posting due to a vacancy, you can vacate the current employee that is currently linked to the position description.

Select supervisor's position from list.

Upload optional supporting documents for the new position action.

On the Position Request Summary page, prior to taking action, review for accuracy all of the information you entered into the request or make additional edits if necessary.

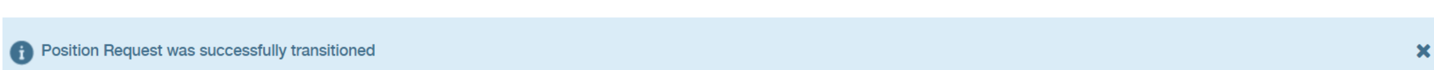
6. To take action, hover over the Take Action on Action button at the top right hand corner of the page and select one of the following:



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.

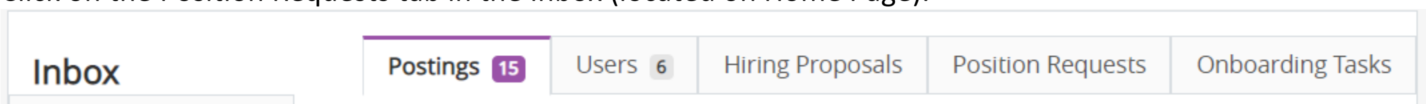


Position Management Module

Approving a Position Description Action:

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

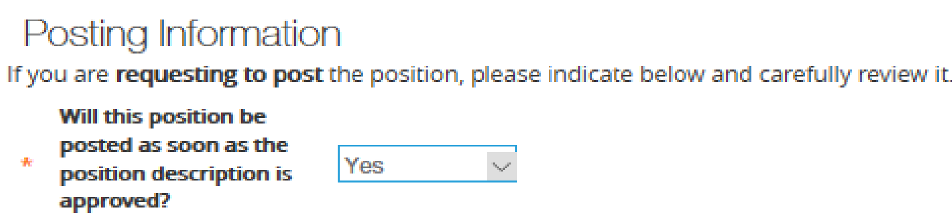
2. Click on the Position Requests tab in the Inbox (located on Home Page).



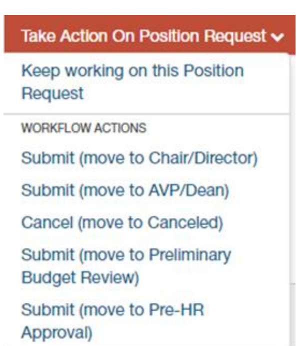
3. Locate the title of the Position Description in your Inbox you wish to take action on. Click on the title.

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.



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 …).



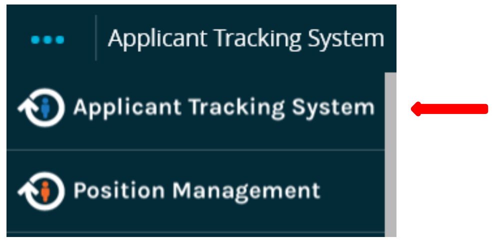
Please note, to save this request and submit later, please select 'Keep working on this Position Request.' If there are additional approvers within the department, you will need to select appropriate action per the workflow.

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.

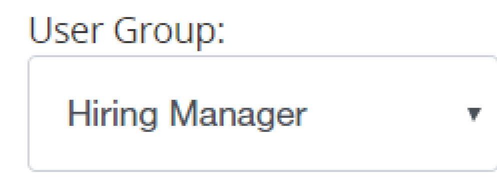
Applicant Tracking System Module

(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.



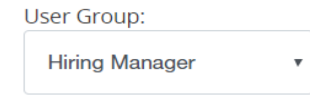
Core Functions of the Applicant Tracking System Module:

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

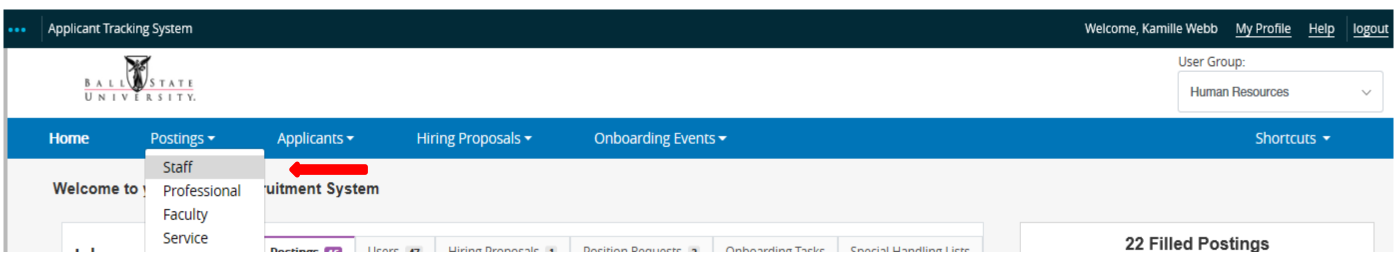
Applicant Tracking System Module

Creating a New Posting

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

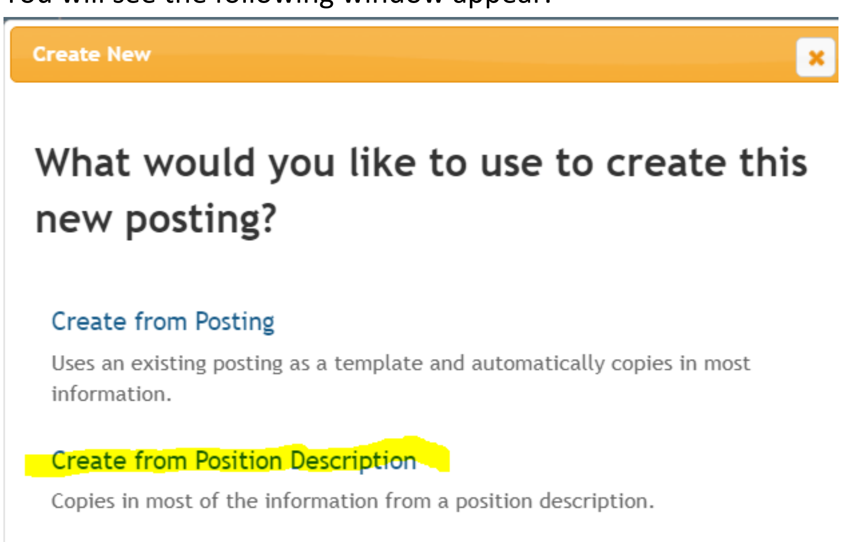


2. Hover over Postings and click **Staff**.
3.



4. On the right side of the page, click on

5. You will see the following window appear:

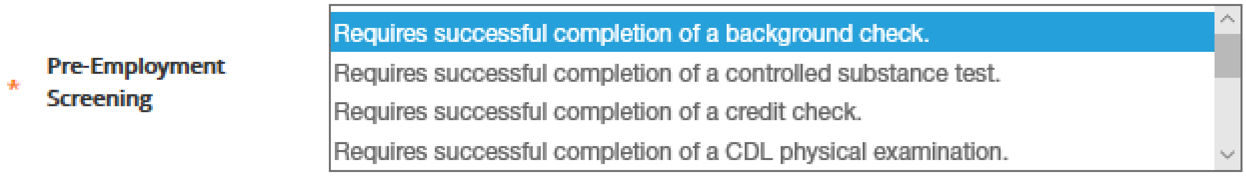


6. You should select "Create from Position Description", as this will populate the information into the posting from the position request that was just updated. The "Create from Posting" option is seldom used. An example of using this option would be a recently failed staff search where you would like 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.

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

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, Preferred Education/ Experience, 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.



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.

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

Close 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.

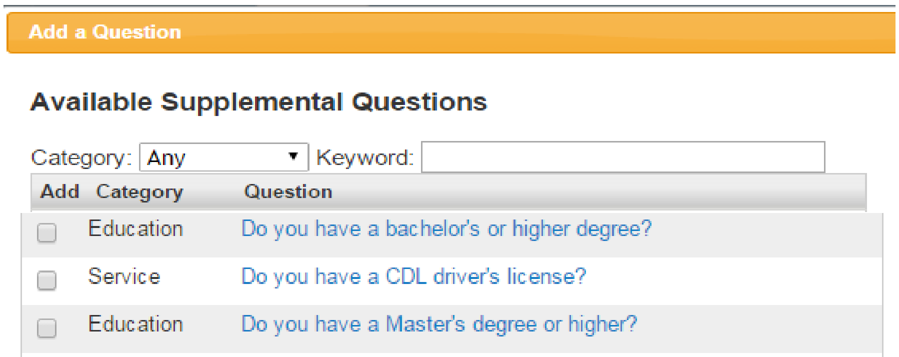
Quick Link for Internal Posting – link to the posting in the applicant portal if this will be an internal posting (A waiver for an internal posting must be requested.)

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.

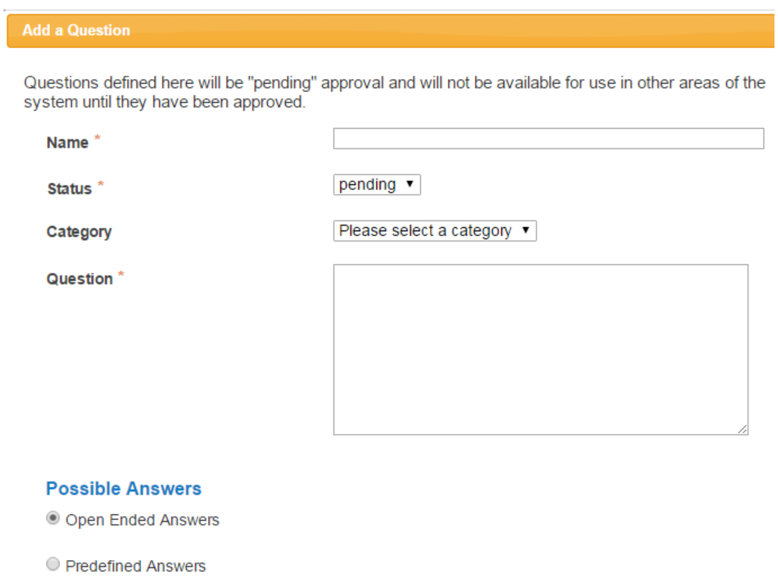
Do You Plan to use a Search Committee for this Search – select either yes or no.

<u>**Supplemental Questions**</u>

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.



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.

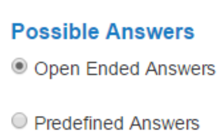


3. Create a name for the question (e.g. Staff – Degree, Staff – Certification). Choose a name that describes the question and/or uses terminology that might be used when conducting a search for a specific question.

4. Select a category for your question from the drop down list (Education, Experience, or Other).

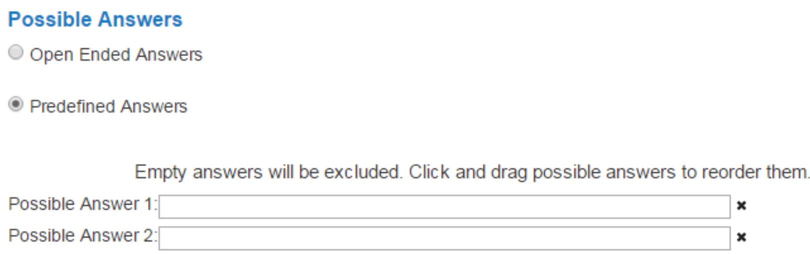
5. Enter the question you would like to use in the Question text box.

6. You will need to select which type of answer will be needed for your question:



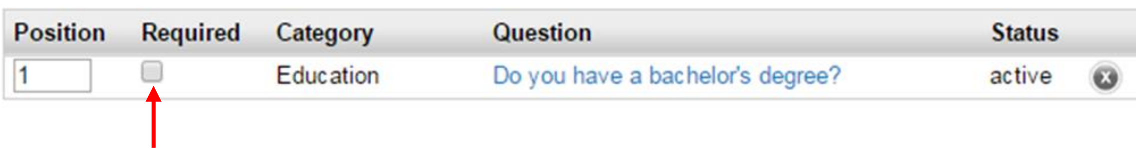
7. Open ended answers allow the applicants to respond with whatever answers they choose.

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.

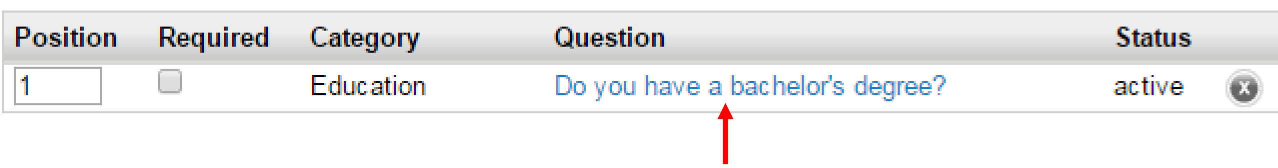


9. Once you have selected the supplemental questions you would like to ask, click on submit.

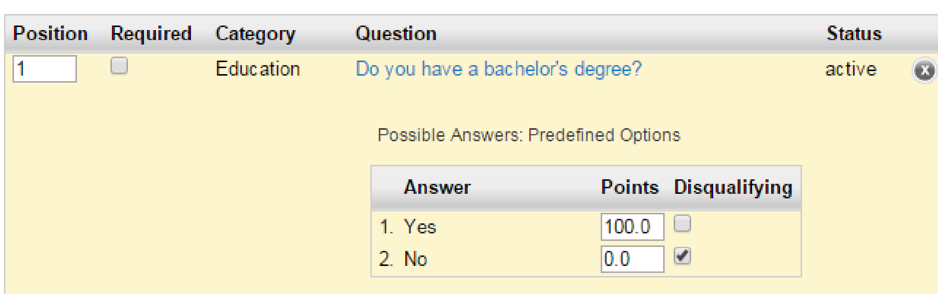
10. In order to make sure the supplemental question is required you must select the required box.



11. If a question has already been approved by Human Resources and is active, you may assign points to each predefined answer. To do so, click on the question name in blue:

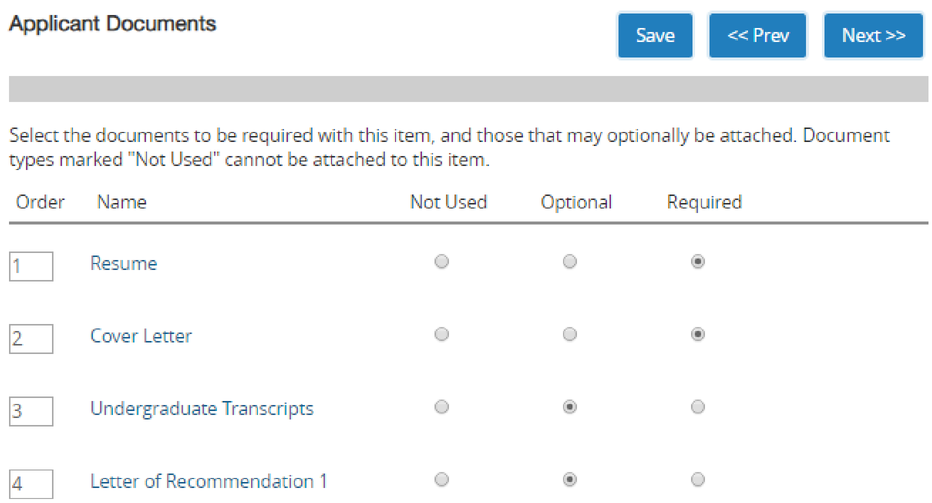


12. Enter points for each answer. *You can also choose to make an answer automatically disqualifying. HR recommends that you not use "disqualifying," as you will not be able to see applications of the applicants whose answers disqualified them.



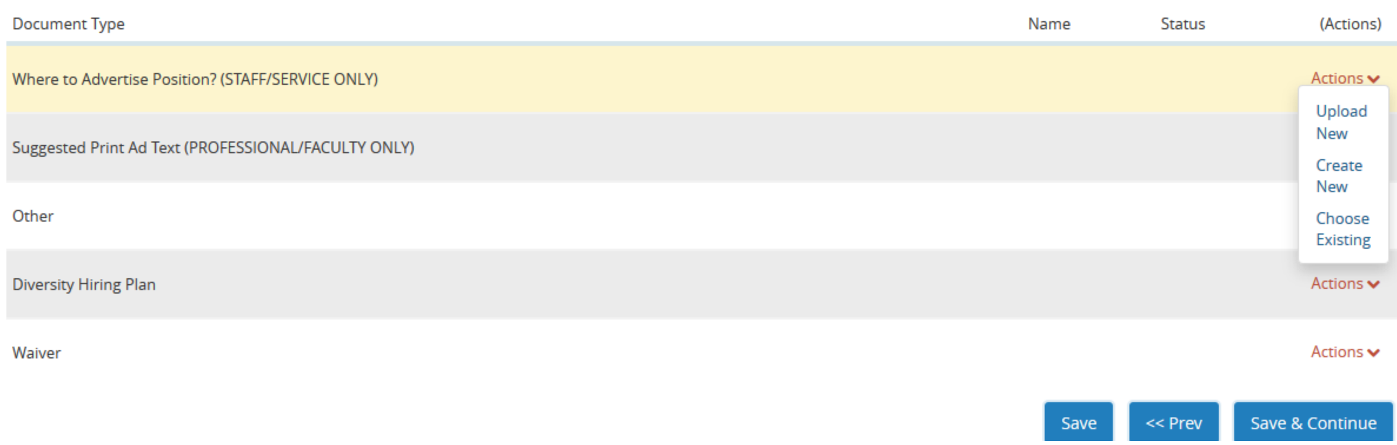
***If you want to use this option, please consult with HR first.**

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 for the Short Staff Application. A cover letter and resume may be optional documents for the Full Staff Application.) Select the "Optional" category for any documents that would be optional.



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.

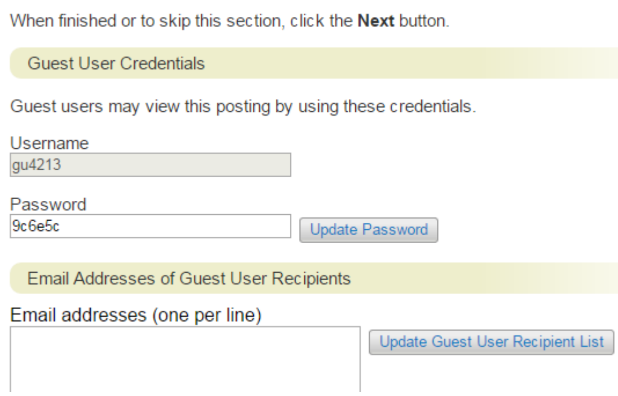


Guest User

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 take any actions on applicants.

1. To add a Guest User, select 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.



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 

*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.

Last Name	First Name	Email	Department	Committee Chair	(Actions)
Schlensker	Susan	SLSCHLENSKER@BSU.EDU	Ball State University	☐	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

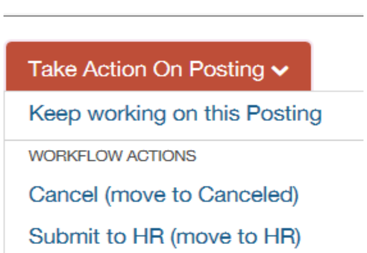
HR-TMS has the functionality to automatically solicit letters of recommendation from individuals whose contact information is provided by the applicant in the Professional Reference section of the application. If you would like to take advantage of this functionality, please contact your HR Partner,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

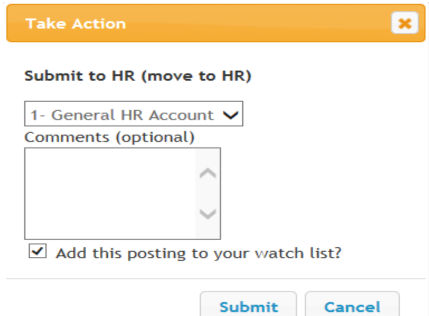
1. You may then take action on the Posting by using the drop-down menu on the upper right hand side of the page.



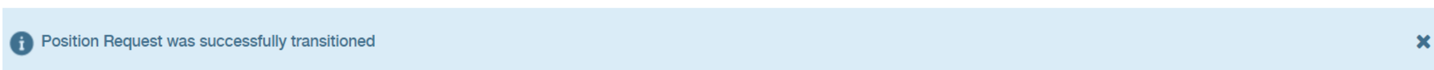
Please note, to save this request and submit later, please select 'Keep working on this Posting.' If there are additional approvers within the department, you will need to select appropriate action per the workflow.

2. You will receive a 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.



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

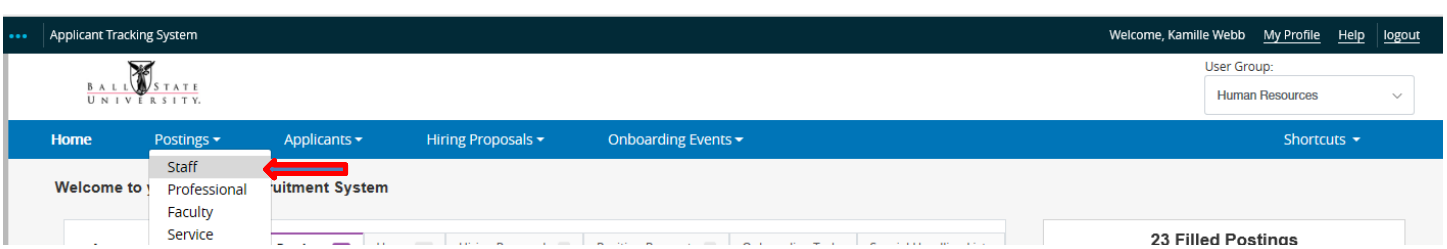


Applicant Tracking System Module

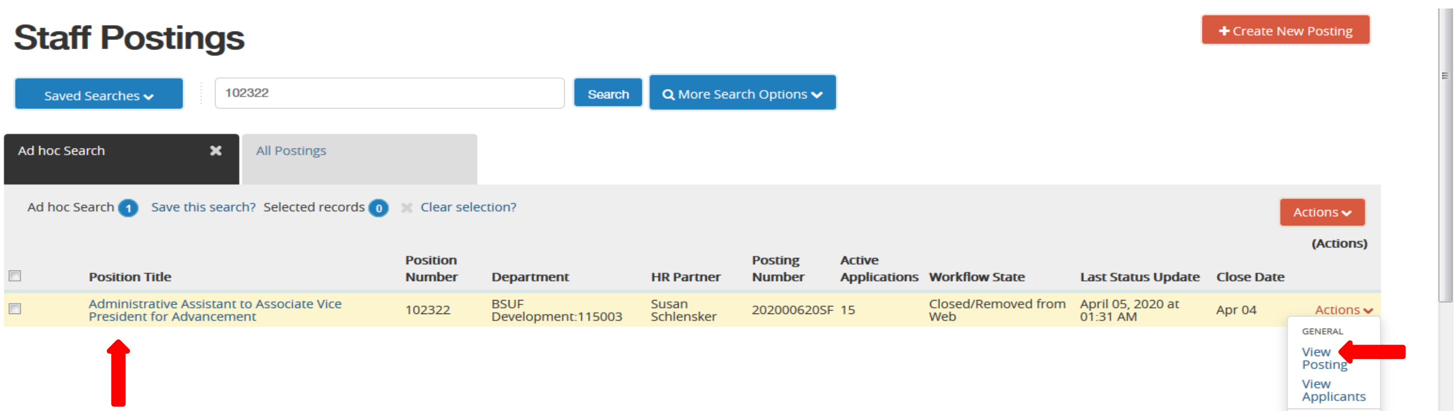
View Job Posting:

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

2. Hover over Postings and select **Staff**.



3. 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.

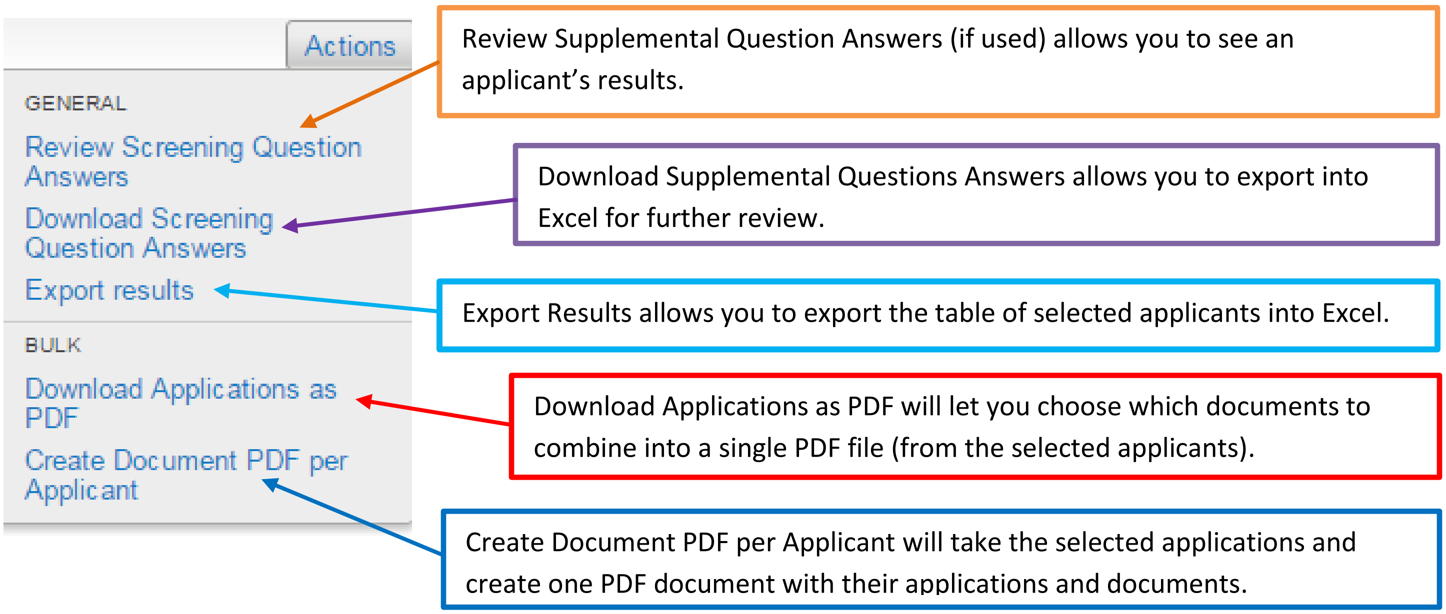


4. The following tabs are available with additional information associated with your posting: Summary, History, Settings, Applicants, Reports, Hiring Proposals, and Associated Position Description.

Summary Tab – Shows a summary of the posting.

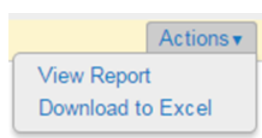
History Tab – Shows a history of the actions taken on the posting.

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



<u>Reports Tab</u> – 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.



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

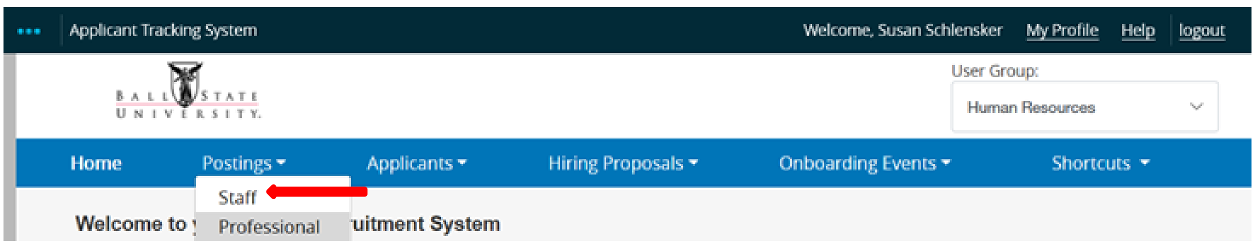
<u>Associated Position Description Tab</u> – shows you the position description associated with this posting. If you are logged in as an Applicant Reviewer, this tab is not available.

Applicant Tracking System Module

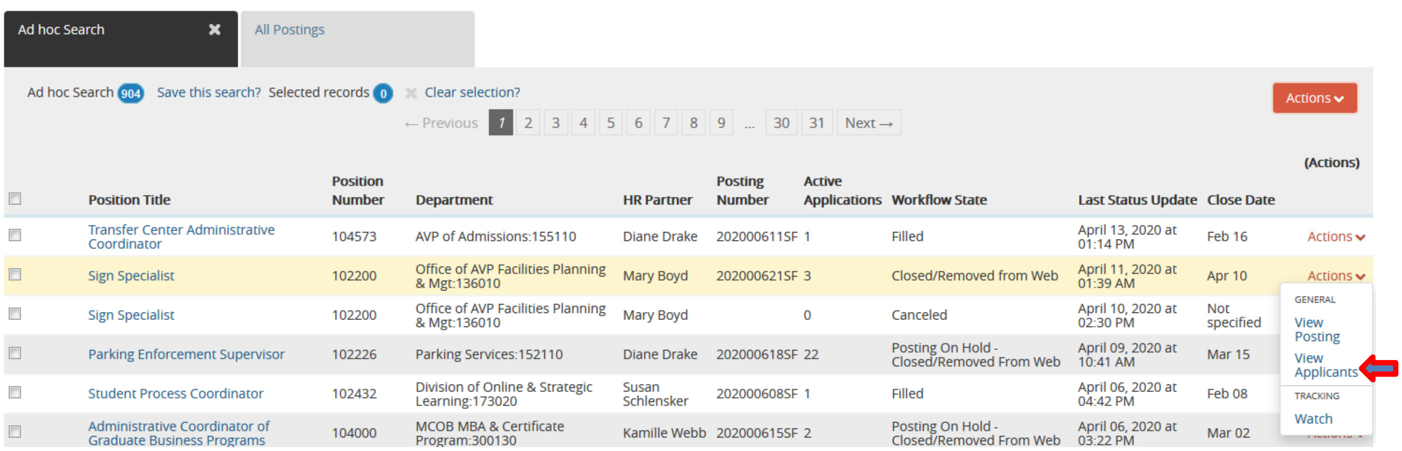
Viewing Applicants/Changing Applicant Statuses:

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

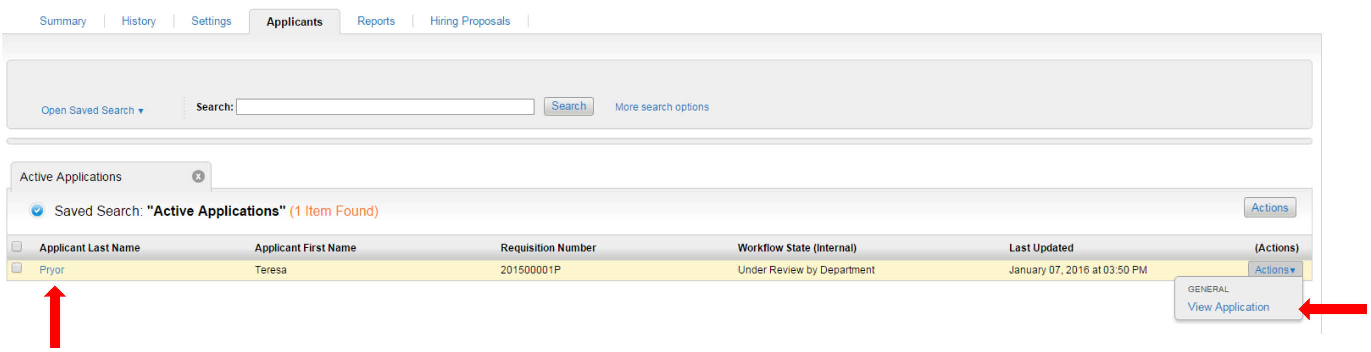
2. Hover over Postings and select Staff.



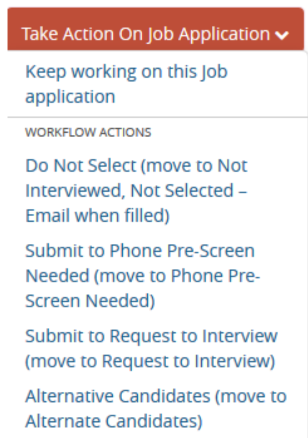
3. Locate the posting and click the Actions menu and choose View Applicants.



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

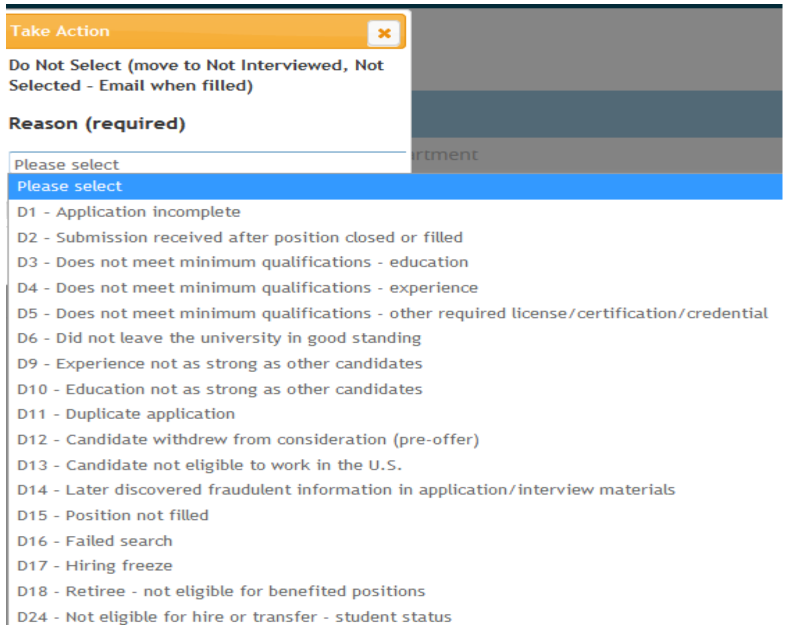


5. Select Take Action on Job Application and select the state you wish to change the applicant to from the menu.



If you select *Do Not Select (move to Not Interviewed, Not Selected – Email when filled)*:

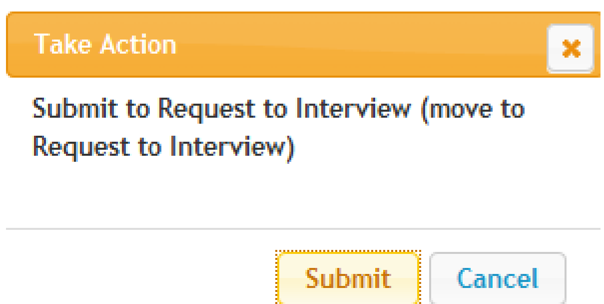
A Take Action box will pop up; and you will need to select the reason. The drop-down menu button will not show; you can either click where it says *please select* and the reasons will appear or you can click and drag the lower right-hand corner of the box to make the box bigger and the menu button will appear. Make your selection and then confirm by clicking submit in the Take Action pop-up window.



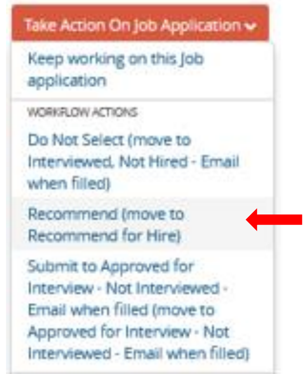
Continue the steps until all applicants you are not interviewing have been moved through appropriate workflow actions to update their status.

Moving Applicants into Request to Interview workflow:

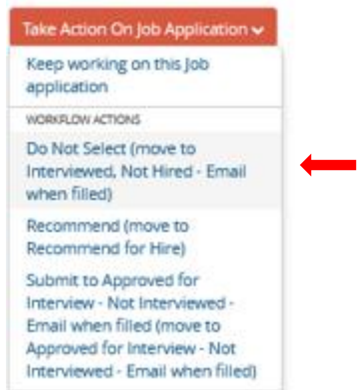
Those that you want to bring to campus for an interview will need to be moved to "Request to Interview."



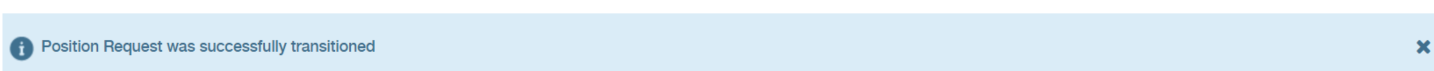
6. Once you have identified the applicant to hire from those who have been approved for interview, select *Recommend (move to Recommend for Hire)* in the Take action on Job Application menu. Human Resources which will initiate the background checks. Human Resources will then notify the Hiring Manager when the background check is complete and the Hiring Proposal may be entered.



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."

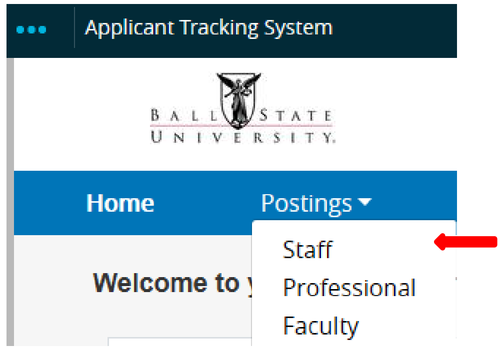


Applicant Tracking Module

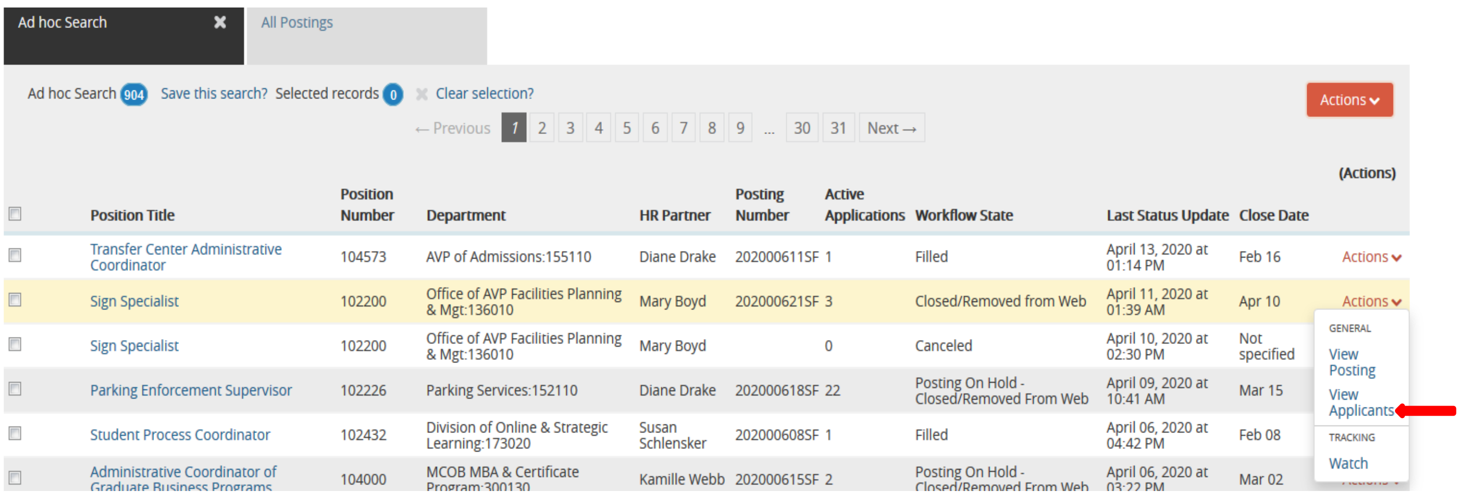
Creating a New Hiring Proposal:

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

2. Hover over 'Postings' and select Staff.



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



Position Title	Position Number	Department	HR Partner	Posting Number	Active Applications	Workflow State	Last Status Update	Close Date	(Actions)
Transfer Center Administrative Coordinator	104573	AVP of Admissions:155110	Diane Drake	202000611SF	1	Filled	April 13, 2020 at 01:14 PM	Feb 16	Actions
Sign Specialist	102200	Office of AVP Facilities Planning & Mgt:136010	Mary Boyd	202000621SF	3	Closed/Removed from Web	April 11, 2020 at 01:39 AM	Apr 10	Actions
Sign Specialist	102200	Office of AVP Facilities Planning & Mgt:136010	Mary Boyd		0	Canceled	April 10, 2020 at 02:30 PM	Not specified	
Parking Enforcement Supervisor	102226	Parking Services:152110	Diane Drake	202000618SF	22	Posting On Hold - Closed/Removed From Web	April 09, 2020 at 10:41 AM	Mar 15	
Student Process Coordinator	102432	Division of Online & Strategic Learning:173020	Susan Schlensker	202000608SF	1	Filled	April 06, 2020 at 04:42 PM	Feb 08	
Administrative Coordinator of Graduate Business Programs	104000	MCOB MBA & Certificate Program:300130	Kamille Webb	202000615SF	2	Posting On Hold - Closed/Removed From Web	April 06, 2020 at 03:22 PM	Mar 02	

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 .

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.

   Hire Rate –required- you can obtain this amount from your Human Resources Partner.

   Shift – required – indicate the appropriate shift: 1, 2, or 3.

   HR Partner Phone Number – optional – if you know the HR Partner'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 using 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 – specific reasons for selecting this candidate. 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.

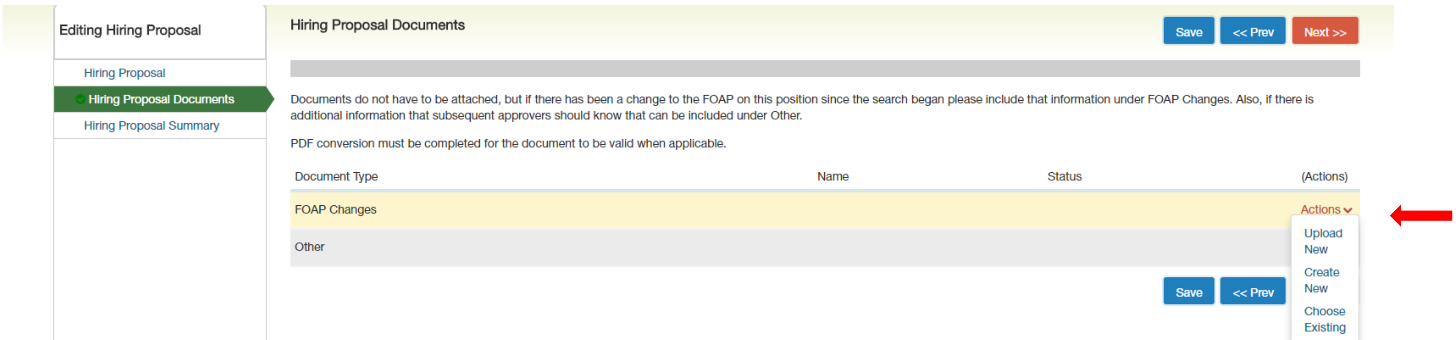
   Employee's Phone – required - if you do not know the telephone number for the new employee, enter alternate information that you may have changed later.

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

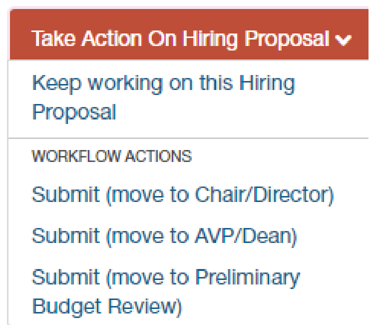
   Time Sheet Org – required – the organization number that performs time sheet approval for this position.

   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.



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



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.

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