



Colorado State University

# Talent Management System (TMS)

---

How to Use the HR Professional User Group

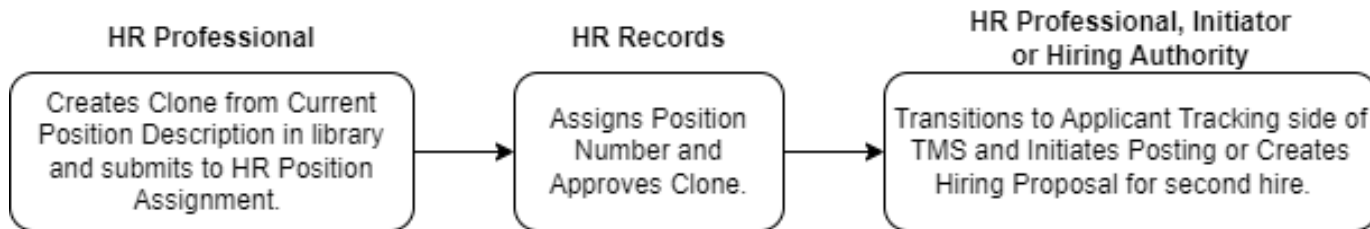


# Create/Modify an Administrative Professional/Research Professional Position Description

Below are the approval steps involved for Position Modifications:



Below are the approval steps involved for Cloning a Position (skip to page 9):



The table on the following slides demonstrates items/fields that may be updated by the HR Professional user group in the TMS that don't require HR Classification and Compensation review. If you have any questions, please reach out to [hr\\_cca@colostate.edu](mailto:hr_cca@colostate.edu).



# Completing the Modification/Clone

The following table demonstrates which fields the HR Professional may change or update on a modification or clone. These changes do not require HR Classification and Compensation (CCA) review.

Position Field	Requires CCA Approval	Does Not Require CCA Approval
Classification Title	X	
Working Title	X	
Employment Category		X
Salary Range	If more than 10K	If less than 10K
Salary Basis	X	
Department	X	
Description of Work Unit		X
Position Summary		X



# Completing the Modification/Clone

Position Field	Requires CCA Approval	Does Not Require CCA Approval
Position Supervises	X	
Decision Making	X	
Conditions of Employment		X
Required Qualifications	Substantive change	Non-substantive change (i.e., grammatical edits)
Preferred Qualifications		X
Hiring Authority		X
Work Hours/Week	X	
Job Duty Category	Substantive Change	Non-substantive change
Duty/Responsibility	Substantive Change	Non-substantive change (i.e., updating software names, grammatical edits)
Percentage of Time	Substantive Change	Non-substantive change



# How to Modify a Position Description

The screenshot shows the 'Position Management' interface. In the top-left corner, three dots are highlighted with a red box. A red callout box points to them with the text: '1. Select the Position Management module by clicking the three dots in the top-left corner of the screen.' In the top-right corner, a 'User Group' dropdown menu is highlighted with a red box, showing 'HR Professional' selected. A red callout box points to it with the text: '2. Select HR Professional from the User Group drop-down menu.' The main content area shows a table with columns 'CURRENT STATE' and 'DAYS IN CURRENT STATE'. The table has three rows of data. On the right side, there is a summary card for 'Active Applicants' showing a large '0' and a legend for 'Evaluated Applicants' (blue) and 'Unevaluated Applicants' (purple). Below that is another card showing '14 Committees Served By Department last 365 Days' with a partial donut chart.

Position Management

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

Applicant Tracking System

Position Management

OTHER TOOLS

Colorado State University Employee Portal

Descriptions ▾ Classifications ▾ Shortcuts ▾

### Online Recruitment System

Postings 3 Hiring Proposals Position Requests 3 Onboarding Tasks

Filters

	CURRENT STATE	DAYS IN CURRENT STATE
OSTDOCTORAL FELLOWSHIP	Initiator	1900
	Initiator	1867
essor	Initiator	896

Active Applicants

0

Evaluated Applicants  
Unevaluated Applicants

14 Committees Served By Department last 365 Days



# How to Modify a Position Description

Position Management

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

Colorado State University

User Group: HR Professional

Home **Position Descriptions** Classifications

Welcome to

Inbox

Special Hand

SEARCH

1. Click on Position Descriptions from the top menu and select Admin Professional/Research Professional.

Note: Position descriptions can be found in two separate areas of the system. Positions that have already been created or modified and are moving through the approval process or have been saved for later will be found under the 'Requests' options.

Once a created or modified position has been 'approved', the updated position can be found in the position 'library' (the library options are those without 'Requests' in the name). If you are creating a position description for the first time or just starting a modification, you will start in the position 'library'.

TITLE	CURRENT STATE	DAYS IN CURRENT STATE
SURGICAL ONCOLOGY POSTDOCTORAL FELLOWSHIP Clinical Sciences	Initiator	1900
Assistant Professor Clinical Sciences	Initiator	1867
Assistant/Associate Professor Clinical Sciences	Initiator	896

Evaluated Applicants

Unevaluated Applicants

14 Committees Served By Department last 365 Days



# How to search for and Modify a Position Description

Note: When you first navigate to the position library, you will be able to see every active position description within the department(s) for which you have the HR Professional user group assigned.

## Professional

+ Create New Position Description

### Position Descriptions

Saved Searches ▾  Search **Q More Search Options ▾**

1. To search for the specific position description you wish to modify, click the More Search Options Button to expand the additional search option fields.

Add Column: Add Column ▾  
Status:   
Position Number:   
Department: Department  
Last Name:

Note: If you know the position number, enter it into the Position Number field then click Search.

Note: The HR Professional group should **not** modify positions that are currently occupied. Please transition to the Initiator user group if you need to modify a current employee's position description.

Ad hoc Search  Admin Professional/Research...

2. When you have located the position you wish to modify, click on its working title.

Items 0  Clear selection?  (Actions)

<input type="checkbox"/>	Working Title	Number	Department	Employee First Name	Employee Last Name	Supervisor	Status	<input type="button" value="Actions ▾"/>
<input type="checkbox"/>	Academic Success Coordinator	012348.0001	College of TMS Training (0000)			Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	<input type="button" value="Actions ▾"/>

# How to Modify a Position Description



User Group:  
HR Professional



- [Print Preview](#)
- [Print Preview \(Employee View\)](#)
- [View Supervisor](#)
- [Modify Position - HR Professional](#)

1. Click Modify AP Position.

## Position Description: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Active

Position Type: Admin  
Professional/ Research  
Professional

Department: College of TMS  
Training (0000)

✔ Position Justification

Position Justification





# How to Modify a Position Description



User Group:

## Start Modify Position - HR Professional Position Request on Academic Success Coordinator?

Once it has been started, this position request will lock the position description from other updates until the position request has completed.

Start

1. Click Start.



# How to Modify a Position Description

From here, you may now follow the remaining instructions starting on page 17.



# How to Clone a Position Description

The screenshot shows the 'Position Management' interface. In the top-left corner, three dots are highlighted with a red box. A red callout box points to them with the text: '1. Select the Position Management module by clicking the three dots in the top-left corner of the screen.' In the top-right corner, a 'User Group' dropdown menu is highlighted with a red box, showing 'HR Professional' selected. A red callout box points to it with the text: '2. Select HR Professional from the User Group drop-down menu.' The main content area shows a table of position descriptions with columns for 'CURRENT STATE' and 'DAYS IN CURRENT STATE'. The table includes rows for 'OSTDOCTORAL FELLOWSHIP' and 'essor'. A sidebar on the left contains 'OTHER TOOLS' and 'Colorado State University Employee Portal'. A right sidebar shows 'Active Applicants' with a large '0' and a legend for 'Evaluated Applicants' and 'Unevaluated Applicants'. A bottom right widget shows '14 Committees Served By Department last 365 Days' with a partial donut chart.

Position Management

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

User Group:  
HR Professional

1. Select the Position Management module by clicking the three dots in the top-left corner of the screen.

2. Select HR Professional from the User Group drop-down menu.

Descriptions ▾ Classifications ▾ Shortcuts ▾

ine Recruitment System

Postings 3 Hiring Proposals Position Requests 3 Onboarding Tasks

Filters

	CURRENT STATE	DAYS IN CURRENT STATE
OSTDOCTORAL FELLOWSHIP	Initiator	1900
	Initiator	1867
essor	Initiator	896

0

Evaluated Applicants  
Unevaluated Applicants

14 Committees Served By Department last 365 Days



# How to Clone a Position Description

Position Management

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

Colorado State University

User Group: HR Professional

Home **Position Descriptions** Classifications

Welcome to

Inbox

Special Hand

SEARCH

1. Click on Position Descriptions from the top menu and select Admin Professional/Research Professional.

Note: Position descriptions can be found in two separate areas of the system. Positions that have already been created or modified and are moving through the approval process or have been saved for later will be found under the 'Requests' options.

Once a created or modified position has been 'approved', the updated position can be found in the position 'library' (the library options are those without 'Requests' in the name). If you are creating a position description for the first time or just starting a modification, you will start in the position 'library'.

TITLE	CURRENT STATE	DAYS IN CURRENT STATE
SURGICAL ONCOLOGY POSTDOCTORAL FELLOWSHIP Clinical Sciences	Initiator	1900
Assistant Professor Clinical Sciences	Initiator	1867
Assistant/Associate Professor Clinical Sciences	Initiator	896

Evaluated Applicants

Unevaluated Applicants

14 Committees Served By Department last 365 Days



# How to Clone a Position Description



User Group:  
HR Professional

## Admin Professional/ Research Professional Position Descriptions

**+ Create New Position Description**

1. Click on +Create New Position Description.

Saved Searches  Search **Q More Search Options**

Admin Professional/Research...

"Admin Professional/Research Professional Positions" 40 Selected records 0 [Clear selection?](#) **Actions**

← Previous 1 2 Next →

<input type="checkbox"/>	Working Title	Position Number	Department	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
<input type="checkbox"/>	Academic Success Coordinator	012341.0001	College of TMS Training (0000)			Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	Actions
<input type="checkbox"/>	Academic Success Coordinator	012342.0001	College of TMS Training (0000)			Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	Actions
<input type="checkbox"/>	Academic Success Coordinator	012343.0001	College of TMS Training (0000)			Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	Actions

# How to Clone a Position Description



Create New AP Position

Start Position Request

Cancel

To create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.

Working Title \*

### Organizational Unit

Division \*

Provost/Executive Vice President (1001DV)

Academic/Reporting Area \*

College of TMS Training Rptg Area (0000RA)

College of TMS Training (0000)

1. On the next page, scroll down to find the Clone an existing Position Description section.

Saved Searches ▾

Search

More Search Options ▾

Clone an existing Position Description?



# How to Clone a Position Description

Search interface showing filters and search options. The "Position Number" field is highlighted with a red box and contains the value "012348". A red callout box points to the "Hide Search Options" button.

Search interface showing filters and search options. The "Position Number" field is highlighted with a red box and contains the value "012348". A red callout box points to the "Hide Search Options" button.

1. In the More Search Options menu, enter the position number of the position you wish to clone or find it in the list below. If you are cloning an occupied position, you may also use the Last Name field.

## Clone an existing Position Description?

2. The position you wish to clone should appear in the list below. Select the position by checking the radio button next to the working title. This tells the system that you will be creating a **new** position description based on the selected position description which in turn, **will clone/pullover many of the fields found on the selected position description.**

Working Title	Position Number	Department	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
<input checked="" type="radio"/> Academic Success Coordinator	012348.0001	College of TMS Training (0000)			Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	Actions ▾

3. When the correct position description is selected, click Start Position Request.

Start Position Request

Cancel



# Position Justification Page – Cloning a New Position

Editing Position Request

- Position Justification
- Classification Selection
- Position Details

## Position Justification

Save Save & Continue

Check spelling  
\* Required Information

### Position Justification

\* Justification of Need

We are cloning a position description to use it for a second hire out of a current search. The position is exactly the same as the one that was cloned (02341.0001).

1. Fill out the Justification of Need field. Be sure to mention that this position is a clone and provide the position number of the position that was cloned.

Please elaborate on reason why position is being submitted for review

\* Is this position gift or grant funded? No

2. Select Yes or No from the Is this position gift or grant funded? drop-down menu.

\* Please indicate the percentage of gift or grant funding for this position. 0  
If this position is not gift or grant funded, please enter in 0.

3. If the position is gift or grant funded, please indicate the percentage in this field. If the position is not gift or grant funded, please enter 0.

\* Source Funding 0  
Please indicate which funds (ie. 64, 53) or 0 if not grant or gift funded

4. Please indicate which funds the position is being funded from. If the position is not grant or gift funded, please enter 0.

Check the box if this position is a State Classified to Administrative Professional conversion

If this position is SC to AP conversion please provide the State Classified title, name of employee, and position number.

Note: These two fields are optional. Please leave them blank if they do not apply to your position.

Note: When you **clone** a position description, you will be redirected to the Position Justification page. If a position was cloned, information from the cloned position description will appear in the fields below. Please be sure to update these fields accordingly. Please note that this is the only page that is different between the clone option and the modify option. Please navigate to page 17 to view the 'modification' required fields. To continue the create/clone process, please navigate to page 19 once you are finished filling out the Position Justification page.





# Position Justification Page – Modifying a Position

Position Requests / ... / Modify AP Position / Academic Success Coordinator / Edit

## Editing Position Request

Position Justification

✔ Classification Selection

## Position Justification

Save

Save & Continue

Note: When you **modify** a position description, you will be redirected to the Position Justification page. Please note that the Position Justification page is the only page with differences between the create/clone option and the modify option as it has the additional Reason for Modification multiselect field. All other fields are the same.

✔ Check spelling

✖ Required Information

## Reason for Modification

\* Reason for Position Modification

- Degree Exception Review
- Vacant/Need for Posting
- Salary/Off-cycle request
- Job Title Change - Salary Adjustment
- Job Title Change - without a salary adjustment
- Reorganization
- Transfer position to new Department/Unit
- FLSA Review
- SalX Request/Update
- Change in duties
- Promotion
- Promotion (RA Series requiring an AAR)
- Change in Employment Category (to or from regular)
- Position Reclassification
- Replacement of Supervisor
- Update Position Description
- Budget Update
- Other

This field is required.

1. Select your reason for modification. Multiple options may be selected. If you are unsure if the modification will result in a new classification, please cancel the current modification and submit it as an Initiator through the standard approval process.



# Position Justification Page – Modifying a Position (cont.)

1. Fill in the Why are you modifying this position description field with as much detail as possible. It's helpful to include information regarding the specific modifications you will be making to the position description i.e. "We are updating the program this position oversees" or "We are updating the position's supervisor to get it ready for a search." etc.

## Position Justification

Why are you modifying this position description?

Updating position to use for a search. Will be making changes to the duties, qualifications as well as the position summary.

*Please elaborate on reason why position is being submitted for processing.*

Is this position gift or grant funded?

No ▾

2. Select Yes or No from the Is this position gift or grant funded? drop-down menu.

Please indicate the percentage of gift or grant funding for this position.

0

*If this position is not gift or grant funded, please enter 0.*

3. If the position is gift or grant funded, please indicate the percentage in this field. If the position is not gift or grant funded, please enter 0.

Source Funding

0

*Please indicate which funds (in 64-53) or 0 if not grant or gift funded.*

4. Please indicate which funds the position is being funded from. If the position is not grant or gift funded, please enter 0.

Check the box if this position is a State Classified to Administrative Professional conversion

If this position is SC to AP conversion please provide the State Classified title, name of employee, and position number.

Note: These two fields are optional. Please leave them blank if they do not apply to your position.

Save

Save & Continue



# Position Justification Page

Position Requests / ... / Modify AP Position / Academic Success Coordinator / Edit

## Editing Position Request

### Position Justification

- ✔ Classification Selection
- ✔ Position Details
- ✔ Essential Job Duties
- ✔ Functional Attributes
- ✔ Position Budget Inform...
- ✔ Background Check Requi...
- ✔ Supervisory Position
- ✔ Employee
- ✔ Position Documents

### Position Request Summary

## Position Justification

1. When you are finished filling out the Position Justification page, click Save & Continue to navigate to the Classification Selection page.

Save

Save & Continue

ABC [Check spelling](#)

\* Required Information

## Reason for Modification

\* Reason for Position Modification

- Degree Exception Review
- Vacant/Need for Posting
- Salary/Off-cycle request
- Job Title Change - Salary Adjustment
- Job Title Change - without a salary adjustment
- Reorganization
- Transfer position to new Department/Unit
- FLSA Review
- SalX Request/Update
- Change in duties
- Promotion
- Promotion (RA Series requiring an AAR)
- Change in Employment Category (to or from regular)
- Position Reclassification
- Replacement of Supervisor
- Update Position Description
- Budget Update
- Other

This field is required.



# Classification Selection Page (DO NOT EDIT)



User Group:  
HR Professional

Shortcuts ▾

Note: The HR Professional user group should not modify this page. If you believe the position you are modifying/cloning needs a different classification, please cancel the current position modification/clone and restart the process as an Initiator, sending it down the standard approval workflow.

## Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Essential Job Duties
- ✓ Functional Attributes
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ Supervisory Position
- ✓ Employee
- ✓ Position Documents
- Position Request Summary

## Classification Selection

Save << Prev Save & Continue

It is optional to complete this information. This tab will be reviewed and completed by the Initiator.  
Job Family Definitions  
Job Levels  
Selected Classification

1. When ready, click Save & Continue.

Classifications - Filter these results

Classification Title	Classification Code	Classification Status	(Actions)
Admin Asst to President	009521	Approved	Actions ▾
Administrator	008000	Approved	Actions ▾

# Position Details Page



User Group:  
HR Professional

Note: The following slides will demonstrate what can and cannot be updated by the HR Professional. All fields highlighted in red are required.

If this is a cloned or modified position description, many of these fields may already be filled in.

Positions ▾

Shortcuts ▾

Coordinator / Edit

Save << Prev Save & Continue

Classification Selection

Position Details

Essential Job Duties

Functional Attributes

Position Budget Inform...

Background Check Requi...

Supervisory Position

Employee

Position Documents

Position Request Summary

ABC Check spelling  
\* Required Information

## Classification Information

If you need to change the Classification, please click on the "Classification Selection" tab.

Classification Title Prof/Indiv Contrib II

Classification Code ACPI02

Salary Grade

Min Salary

Mid Salary

Max Salary

1. Many of the top fields on the Position Details page will not be editable. Scroll down to continue filling out the page.

## Employee Information



# Position Details Page (cont.)

## Employee Information

Employee First Name

Employee Last Name

Employee Id

Note: The Employee Information section should be blank. The HR Professional user group should not modify currently occupied positions. The only time it's appropriate for the HR Professional user group to modify an occupied position is if the employee seated in the position will be vacating their position and the department wishes to update the position before searching for their replacement.

Note: A Position Number will only appear if you are modifying a position description. If you are cloning a position, HR Records will assign a position number once the clone is sent to their queue.

## Position Information

Working Title Academic Success Coordinator

Position Number 012341.0001

PD Job Number

Supervisor Email Address emily.rogers@colostate.edu

Employment Category Regular

Proposed Annual Salary Range \$40,000 - \$45,000  
Provide the estimated starting salary or range.

Salary Basis 12-month assignment

FLSA Non-Exempt

Department College of TMS Training

Hogwarts School of Witchcraft and Wizardry is the British wizarding school, located in the Highlands of Scotland.

1. The position's working title will appear in this field. You may only make non-substantive changes to this field without requiring HR CCA's review (i.e., adding a program name or fixing a typo). If you have any questions regarding what can and cannot be updated/added, please reach out to [hr\\_cca@colostate.edu](mailto:hr_cca@colostate.edu).

3. The HR Professional user group may update the Employment Category field.

Note: The HR Professional user group should not update the position's Salary Basis field.

Note: These two fields will not be editable by you.

2. Update or enter the position's supervisor's email address if needed.

3. The Proposed Annual Salary Range field may be changed by up to \$10,000 without requiring HR CCA review. For some positions, an increase or decrease in salary may trigger a FLSA review. If you have any questions, please reach out to [hr\\_cca@colostate.edu](mailto:hr_cca@colostate.edu).



# Position Details Page (cont.)

1. The HR Professional user group may make any necessary changes to the Description of Work Unit field.

Description of Work Unit	Hogwarts School of Witchcraft and Wizardry is the British wizarding school, located in the Highlands of Scotland. Established around the 10th century, Hogwarts is considered to be one of the finest magical institutions in the wizarding
--------------------------	--

*Mission statement, services provided by department, market posting. This information may be found on your department*

2. The HR Professional may make any necessary changes to the Position Summary field.

* Position Summary	The incumbent of this position will advise 4th-year students in Divination, Defense Against the Dark Arts and Muggle Studies. This includes advising students on coursework, providing outreach and intervention to students of concern,
--------------------	--

Note: The HR Professional should not update the Position Supervises field. If you need to make edits to this field, either cancel the current position request and start again as an Initiator, or reach out to HR CCA at [hr\\_cca@colostate.edu](mailto:hr_cca@colostate.edu).

* Position Supervises	None
-----------------------	------

*How many employees will this position supervise? Include titles and employment groups (SC/AP/Faculty/Student/etc.).*

Note: The HR Professional should not update the Decision Making field.

* Decision Making	Guide students towards making informed decisions on 2- and 4-year course completion plans Design and implement introductory undergraduate courses including
-------------------	--

*Provide specific examples of decisions at the highest level of significance that are related to the Essential Job Duties of the position, are regular and on-going, do not require supervisory approval, and determine how the duties are performed.*

Pre-employment Criminal Background Check (required for new hires)



# Position Details Page (cont.)

1. This field can be updated if necessary.

## Conditions of Employment

- Pre-employment Criminal Background Check (required for new hires)
- Pre-employment Physical
- Pre-employment Drug Testing
- Ongoing Functional Capacity Testing
- Valid Driver's License
- Essential Services Designation
- Shift Work
- On-call Status
- Use, Handling, or Exposure to hazardous materials
- Use of Firearms or Other Weapons
- Travel
- Special Requirements/Other

Note: If the position requires driving to conduct CSU business, 'Valid Driver's Licenses' must be selected under Conditions of Employment, Motor Vehicle Background check must be selected on the Background Checks page, and the following language must be added as a required job qualification: "Must have a valid driver's license, or be able to obtain a valid driver's license, or have access to a licensed driver by the employment start date."

2. Only non-substantive changes should be made to the Required Job Qualifications. Please do not add or remove required degrees or update required years of experience. If you are not sure what counts as substantive, please reach out to HR CCA.

## Required Job Qualifications

\* B.S. or B.A. degree completed by the time of appointment and a minimum of two years of professional experience in magical higher education working with students or other similar experience.  
\* Ability to collect, analyze and interpret data, and maintain databases.

Note: For help formatting any text field with bullets, please see the [TMS Formatting Guide](#).

## Preferred Job Qualifications

\* A Master's degree in Magical Education Completed Ministry of Magic training on magical crisis response, particularly relating to trolls, dementors, and magical impostors.  
\* Experience assisting with management of class programs including advising and course selection.

3. The HR Professional user group may make any necessary changes to the Preferred Job Qualifications.

Hiring Authority

Rogers, Emily ✕





# Position Details Page (cont.)

1. Enter at least one Hiring Authority in the Hiring Authority field by typing in their name. You may list multiple Hiring Authorities. If your desired Hiring Authority does not appear in the list of options, please contact OEO at [oeo@colostate.edu](mailto:oeo@colostate.edu).

Note: Please do not edit the Work Hours/Week field.

**Required Job Qualifications**

- \* B.S. or B.A. degree completed by the time of appointment and a minimum of two years of professional experience in magical higher education working with students or other similar experience.
- \* Ability to collect, analyze and interpret data, and maintain databases.
- \* Experience in advising/mentoring students

**Preferred Job Qualifications**

- \* A Master's degree in Magical Education Completed Ministry of Magic training on magical crisis response, particularly relating to trolls, dementors, and magical impostors.
- \* Experience assisting with management of class programs including advising and course selection.
- \* Demonstrated creativity, leadership, and

**Hiring Authority**

**Is this an Hourly position?**   
*Hourly positions do not have guaranteed hours and may work within a range of 0-40 hours per week.*

**Work Hours/Week**   
*Please enter a value from 0 - 40 representing the number of work hours per week for this position. If the position is for an hourly employee, please set the work hours to 0.*

Note: Please do not update the Is this an Hourly position field.

4. When complete, click Save & Continue.



# Essential Job Duties Page

Note: The HR Professional user group may only make non-substantive changes to the essential job duties page (i.e., updating grammatical mistakes or adding new programs or department language to the Duty/Responsibility field). If you are unsure if the change require HR CCA approval, or if you need to make a change to the Percentage of Time field, please reach out to [hr\\_cca@colostate.edu](mailto:hr_cca@colostate.edu).

Save    << Prev    Save & Continue

- ✓ Position Details
- ✓ **Essential Job Duties**
- ✓ Functional Attributes
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ Supervisory Position
- ✓ Position Documents
- Position Request Summary

ABC [Check spelling](#)

You **MUST** include at least two Essential Job Duties for the position to be approved.

\* Required Information

## Essential Job Duties

Job Duty Category

Advising \*

*E.g. Supervision, Accounting, Project Management, etc.*

Duty/Responsibility

\* Advises Divination, Defense Against the Dark Arts and Muggle Studies students.  
\* Assists all 4th-year students through issues including transitions and major exploration.  
\* Tracks students, provides outreach and intervention to, and assists faculty with students of concern.  
\* Meets with students on academic \*

Percentage Of Time

60 \*

*Remember: Job Duties entries must total 100%*

Remove Entry?

Add Essential Job Duties Entry

1. When ready, click Save & Continue.

Save    << Prev    **Save & Continue**



# Functional Attributes Page

Note: Functional Attributes may be updated on this page.

User Group:

HR Professional

## Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Essential Job Duties
- ✓ Functional Attributes**
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ Supervisory Position
- ✓ Employee
- ✓ Position Documents

Position Request Summary

## Functional Attributes

Save

<< Prev

Save & Continue

### Physical Demands

Select the frequency of use for each of the physical demands listed below.

[Link to full definition/description](#)

Exertion of Force	A - Sedentary ▾
Sitting	Constant (67-100%) ▾
Standing	Frequent (34-66%) ▾
Climbing	Never ▾
Balancing	Never ▾
Stooping	Rare (0-5%) ▾
Kneeling	Rare (0-5%) ▾

Never ▾  
Please select  
Never  
Rare (0-5%)  
Occasional (6-33%)  
Frequent (34-66%)  
Constant (67-100%)  
Rare (0-5%) ▾

2. When complete, click Save & Continue.

1. To make a selection, click on the drop-down menu next to each category and select one of the options that best aligns with the physical demands of the position.



# Position Budget Information Page

Note: On the Position Budget Information page you may click on the Add Budget Summary Entry button to fill in the Budget Account Number, Percentage Funded, and Budget Account Name fields. While not required, this page is recommended and can be helpful when managing funding from multiple grants.

User Group:

HR Professional

Shortcuts ▾

ator / Edit

## Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Essential Job Duties
- ✓ Functional Attributes
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ Supervisory Position
- ✓ Position Documents
- Position Request Summary

## Position Budget Information

Save

<< Prev

Save & Continue

### Budget Summary

Add Budget Summary Entry

1. To add a budget summary entry, click on the Add Budget Summary Entry button.

Save

<< Prev

Save & Continue

2. When ready, click Save & Continue.



# Background Check Requirement Page



User Group:

HR Professional

Shortcuts ▾

Note: On the Background Check Requirement page select any additional background checks the department wishes to conduct for this position in addition to the automatic criminal history background check for new hires and rehires.

Coordinator / Edit

## Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Essential Job Duties
- ✓ Functional Attributes
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ Supervisory Position
- ✓ Position Documents

Position Request Summary

## Background Check Requirement

Save

<< Prev

Save & Continue

Colorado State University requires a criminal history background check for all new hires. Select "Yes" to the question below to require additional background checks to be performed on the selected candidate.

\* Required Information

### Background Check Requirement

Education Check: Is an educational degree check desired?

Financial History Check: does the position reside in Student Financial Services

\* Motor Vehicle Record Check: does the position require driving a motor vehicle (i.e. university owned, personal, rental, etc.) on a routine basis to conduct university business?

1. All drop-down choices on this page are optional, with the exception of the required Motor Vehicle background check option. You must select either Yes or No.

2. When ready, click Save & Continue.

Note: If a Motor Vehicle Record Check is required for the position, it must be reflected in the Required Job Qualifications field by adding the language "Must have a valid driver's license, or the ability to obtain a driver's license, or access to a licensed driver by the employment start date." 'Valid Driver's Licenses' must also be selected in the Conditions of Employment multi-select field.



# Supervisory Position Page



User Group:

HR Professional

Home    **Position Descriptions** ▾    Classifications ▾    Shortcuts ▾

Position Requests / ... / Create New AP Position / Academic Success Coordinator / Edit

Note: On the Supervisory Position, the HR Professional may update or add the correct position supervisor. If you are modifying a position or cloning a position, a supervisor may already be selected. If you need to replace a selected supervisor, follow the directions below.

Save    << Prev    Save & Continue

Please select the supervisor for this position.

Selected Supervisor

Position Descriptions - [Filter these results](#)

1. The easiest way to select a supervisor is to search for their position description. To do so, click Filter these results.

Admin Professional/Research...

"Admin Professional/Research Professional Positions" 40

← Previous 1 2 Next →

	Working Title	Position Number	Department	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
<input type="radio"/>	Academic Success Coordinator	012341.0001	College of TMS Training (0000)				Active	Actions ▾
<input type="radio"/>	Academic Success Coordinator	012342.0001	College of TMS Training (0000)				Active	Actions ▾



# Supervisory Position Page (cont.)



User Group:

HR Professional

Home    Position Descriptions ▾    Classifications ▾    Shortcuts ▾

Position Requests / ... / Create New AP Position / Academic Success Coordinator / Edit

Editing Position Request

Note: If you are unable to locate the supervisor's position, ensure you are searching under the correct 'Position Type'. For example, if a Faculty member is supervising an Administrative Professional research position, ensure you switch the Position Type field to 'Faculty' before clicking Search.

Sup Search Position Descriptions

Search

Position Type: Admin Professional/ Research Professional ▾

Add Column: Add Column ▾

Status: × Active

Position Number: 012345.0001

Department: × College of TMS Training (0000)

Last Name: Granger

Search Cancel

Save    << Prev    Save & Continue

1. In the pop-up window, search for the supervisor's position by either entering their position number, searching within a specific department or by entering their last name. When ready, click Search.

○	Academic Success Coordinator	012342.0001	College of TMS Training (0000)	Active	Actions ▾
---	------------------------------	-------------	--------------------------------	--------	-----------



# Supervisory Position Page (cont.)



User Group:

HR Professional

Home    Position Descriptions ▾    Classifications ▾    Shortcuts ▾

Position Requests / ... / Create New AP Position / Academic Success Coordinator / Edit

## Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Essential Job Duties
- ✓ Functional Attributes
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ **Supervisory Position**
- ✓ Position Documents
- Position Request Summary

## Supervisory Position

Save    << Prev    Save & Continue

Please select the Supervisor for this position.

### Selected Supervisor

Position Descriptions - Filter these results

Working Title	Position Number	Department	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Director - Academic Advancement Center	012345.0001	College of TMS Training (0000)	Hemione	Granger	Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	Actions ▾

1. Once you've located the correct position, check the radio button next to the position then click Save.

Save    << Prev    Save & Continue





# Supervisory Position Page (cont.)



User Group:

HR Professional

Note: The Employee tab will only appear if you are **Modifying** a position description. If you are modifying an occupied position description to prepare it for a search, the employee's name will appear on this page. If you need to 'vacate' the position, you may do so here. Please only vacate the position if the current occupant has already left CSU or this role, otherwise, move forward by clicking on the Position Documents tab.

Classifications

Shortcuts

Position / Academic Success Coordinator / Edit

## Supervisory Position

Save << Prev Save & Continue

Note: The selected supervisor should now appear below.

Please select the Supervisor for this position.

### Selected Supervisor

Job Title	Director - Academic Advancement Center view
Position Number	
Position Type	Admin Professional/ Research Professional
Org Unit	College of TMS Training (0000)
First Name	Hemione
Last Name	Granger
Email	

- Supervisory Position
- Employee
- Position Documents

Position Request Summary

Position Descriptions - Filter these results



# Position Documents Page

Note: On the Position Documents page, you will be required to upload documents associated with the position, such as the required Organizational Chart. If you are modifying a position or cloning a position, an Organizational Chart may already be attached. Please make sure that it is the most current Organizational Chart for the department or unit.

User Group:  
HR Professional

Shortcuts ▾

### Editing Position Request

- ✓ Position Justification
- ✓ Classification Selection
- ✓ Position Details
- ✓ Essential Job Duties
- ✓ Functional Attributes
- ✓ Position Budget Inform...
- ✓ Background Check Requi...
- ✓ Supervisory Position
- ✓ Employee
- ✓ Position Documents**
- Position Request Summary

## Position Documents

Save << Prev Save & Continue


Uploads will be converted to PDF documents.  
PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Current Organizational Chart (Required)			Actions ▾ Upload New Create New Choose Existing
FLSA Form			
State Classified PDQ - Physical Copy (NEW)			
State Classified PDQ - Physical Copy (PREVIOUS)			Actions ▾
Other			Actions ▾

1. To upload a document, hover over Actions and select Upload New from the drop-down menu.

# Position Documents Page (cont.)

Position Management Welcome, Test User [My Profile](#) [Help](#) [logout](#)

 User Group:

[Home](#) [Position Descriptions](#) [Classifications](#) [Shortcuts](#)

Admin / Manage Documents ☆

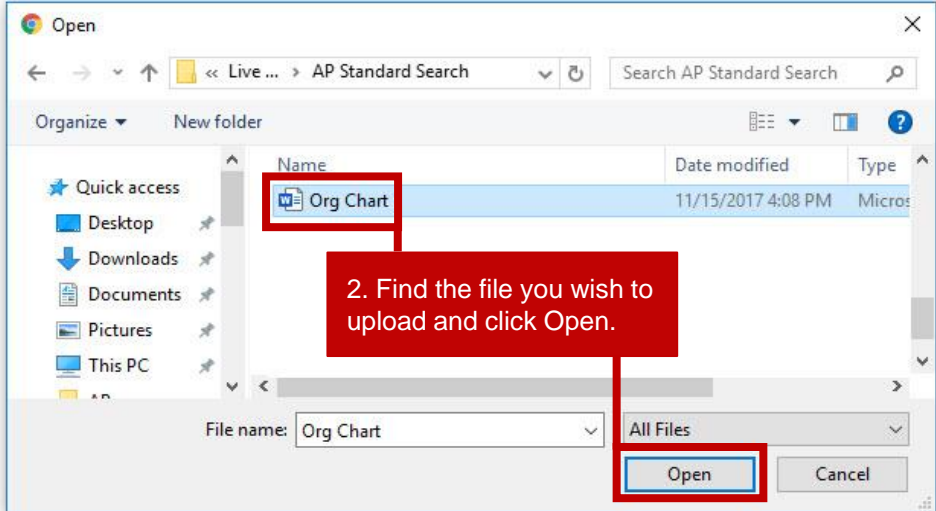
## Upload a Current Organizational Chart (Required)

To upload your document, provide a name and description of the document. To choose a file to upload, click the **Choose File** button and select the file from your computer. When you are ready to submit your document, click the **Submit** button.

Name:

Description:

File to upload:  No file chosen



1. Click on the Choose File button.

2. Find the file you wish to upload and click Open.

3. Once the correct file has been selected, click Submit.

# Position Documents Page (cont.)

Document 'Current Organizational Chart (Required) 02-10-20 15:29:33' was successfully created.

Note: A banner across the top of the page will let you know that your upload was successful.

Welcome, Test User [My Profile](#) [Help](#) [logout](#)

User Group:  
HR Professional

Home **Position Descriptions** Classifications Shortcuts

Position Requests / ... / Modify AP Position / Academic Success Coordinator / Edit

- Editing Position Request
- Position Justification
- Classification Selection
- Position Details
- Essential Job Duties
- Functional Attributes
- Position Budget Inform...
- Background Check Requi...
- Supervisory Position
- Employee
- Position Documents**
- Position Request Summary

## Position Documents

1. When complete, click Save & Continue to progress to the Summary page.

Save << Prev Save & Continue

Uploads will be converted to PDF documents.  
PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Current Organizational Chart (Required)	Current Organizational Chart (Required) 02-10-20 15:29:33	PDF conversion in process	
FLSA Form			Actions
State Classified PDQ - Physical Copy (NEW)			Actions
State Classified PDQ - Physical Copy (PREVIOUS)			Actions

Note: The system will automatically convert all uploaded documents into PDFs.

# Approving a Modification



User Group:  
HR Professional



## Modify Position - HR Professional: Academic Success Coordinator (Admin Professional)



Current Status: Draft

Position Type: Admin Professional/ Research Professional

Department: College of TMS Training (0000)

Created by: Emily Rogers  
Owner: Emily Rogers

Take Action On Position Request ▾

- Keep working on this Position Request

WORKFLOW ACTIONS

- Modifications Complete (move to Approved)**
- Cancel (move to Canceled)

1. To approve the modification, hover over the Take Action On Position Request and select Modification Complete (move to Approved).

Note: Once approved, a posting can immediately be created on the Applicant Tracking side of the TMS (see page 39).



# Approving a Clone

Position Management Welcome, Emily Rogers [logout](#)

Colorado State University User Group: HR Professional

Home Position Descriptions ▾ Classifications ▾ Shortcuts ▾

Position Requests / ... / [Create Position - HR Professional](#) / New Position definition / Summary

## Create Position - HR Professional: Academic Success Coordinator (Admin Professional Professional)

Current Status: Draft

Position Type: Admin Professional/ Research Professional  
Department: College of TMS Training (0000)

Created by: Emily Rogers  
Owner: Emily Rogers

Take Action On Position Request ▾  
Keep working on this Position Request  
WORKFLOW ACTIONS  
Submit (move to HR Position Assignment)

1. Once the clone is ready for approval, hover over the Take Action On Position Request and select Submit (move to HR Position Assignment)

Note: Clones require HR Records approval as Records will need to assign the clone a position number. Once the clone has been assigned a position number, a posting can be created on the blue Applicant Tracking side of the TMS (see page 39), or a Hiring Proposal using the clone can be created if the clone is to be used for a second hire out of a search.

Summary History Settings

✔ Position Justification

<https://colostate-sb.peopleadmin.com/hr/actions/22076#>



# Creating a Job Posting

Below are the approval steps involved when creating a Job Posting:



The steps in the following slides explain how to create a Posting Request as an HR Professional.

# How to Create a Posting

The screenshot shows the Applicant Tracking System interface. In the top-left corner, a red box highlights three dots next to the 'Applicant Tracking System' menu item. A red callout box points to these dots with the text: '1. Select the Applicant Tracking module by clicking the three dots in the top-left corner of the screen.' In the top-right corner, a red box highlights the 'User Group' dropdown menu, which is currently set to 'HR Professional'. A red callout box points to this menu with the text: '2. Select HR Professional from the User Group drop-down menu.'

The main content area displays the 'Online Recruitment System' dashboard. It includes a navigation bar with 'Postings 29', 'Users 438', 'Hiring Proposals 23', 'Position Requests 311', and 'Onboarding Tasks'. Below this is a search bar and a 'Filters' button. A table lists various recruitment categories and their current states and durations.

	CURRENT STATE	DAYS IN CURRENT STATE
OSTDOCTORAL FELLOWSHIP	Initiator	2918
	Initiator	2885
Engineering (Dean's Office)	Initiator	1914
Science	Initiator	1914
Pool	Initiator	1914


On the right side, there is a large '0' indicating the number of applicants, with a legend for 'State Classified', 'Admin Professional/ Research Professional', 'Faculty', and 'Temporary Hourly'. Below this is a chart titled 'Applicants Per Day Last Week'.





# How to Create a Posting

Applicant Tracking System Welcome, Emily Rogers [logout](#)

 User Group:

Home **Postings** Shortcuts

Welcome to

State Classified  
Admin Professional/ Research Professional  
Faculty

1. Click over Postings and select Admin Professional/ Research Professional from the drop-down menu.

Inbox Postings 29 Users 438 Hiring Proposals 23 Position Requests 311 Onboarding Tasks

Special Handling Lists

SEARCH  Filters

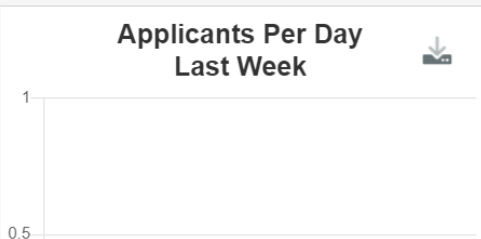
TITLE	CURRENT STATE	DAYS IN CURRENT STATE
<a href="#">SURGICAL ONCOLOGY POSTDOCTORAL FELLOWSHIP</a> Clinical Sciences	Initiator	2918
<a href="#">Assistant Professor</a> Clinical Sciences	Initiator	2885
<a href="#">Professor</a> Walter Scott, Jr. College of Engineering (Dean's Office)	Initiator	1914
<a href="#">Assistant Professor, Meat Science</a> Animal Sciences	Initiator	1914
<a href="#">https://colostate-sb.peopleadmin.com/hr/postings?position_type_id=2</a>	Initiator	1914

0 Filled Postings Last 30 days

0

State Classified  
Admin Professional/ Research Professional  
Faculty  
Temporary Hourly

Applicants Per Day Last Week



# How to Create a Posting



User Group:  
HR Professional

## Admin Professional/ Research Professional Postings

+ Create New Posting

1. Click + Create New Posting

Saved Searches  Search

Add Column:

Admin Professional/Research...

"Admin Professional/Research Professional Postings" 2 Selected records 0 Clear selection?

<input type="checkbox"/>	Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Status Update	(Actions)
<input type="checkbox"/>	Academic Success Coordinator		012343.0001	College of TMS Training (0000)	0	Draft	October 20, 2022 at 02:09 PM	Actions
<input type="checkbox"/>	Academic Success Coordinator	201900248AP	012380.0001	College of TMS Training (0000)	8	Hiring Authority Review and Approval	October 13, 2022 at 11:00 AM	Actions



# How to Create a Posting



User Group:  
HR Professional

## Admin Professional/ Research Professional

+ Create New Posting

Create New

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

**Create from Position Type**  
Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.

**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.

1. In the pop-up window, select Create from Position Description.

	Working Title	Posting Number	Position Number	College	Count	Status	Last Status Update	Actions
<input type="checkbox"/>	Academic Success Coordinator	012343.0001		College of TMS Training (0000)	0	Draft	October 20, 2022 at 02:09 PM	Actions
<input type="checkbox"/>	Academic Success Coordinator	201900248AP 012380.0001		College of TMS Training (0000)	8	Hiring Authority Review and Approval	October 13, 2022 at 11:00 AM	Actions



# How to Create a Posting



User Group:  
HR Professional

## Admin Professional/ Research Professional Position Descriptions

Saved Searches  Search **Hide Search Options**

Add Column: Add Column

Department: Department

**Position Number: 012341.0001**

Last Name:

Outstanding Actions: Select outstanding actions

Note: You can search for the exact position using the Position Number field in the More Search Options drop-down menu.

1. Locate the position you wish to create the posting from and click on the Working Title.

Working Title	Position Number	Department	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
<b>Academic Success Coordinator</b>	012341.0001	College of TMS Training (0000)			Coordinator: Search Approvals & Office Operations (Becca McCarty)	Active	<b>Actions</b>

# How to Create a Posting



User Group:  
HR Professional



1. On the next page, select Create Posting from this Position Description.

- Print Preview
- Print Preview (Employee View)
- Create Posting from this Position Description**
- View Supervisor
- Modify Position - HR Professional

## Position Description: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Active

Position Type: Admin Professional/ Research Professional

Department: College of TMS Training (0000)

Note: If the Create button does not appear, this means there is an outstanding posting already tied to this position. Please reach out to OEO at [oeo@colostate.edu](mailto:oeo@colostate.edu) if this happens.

Position Justification

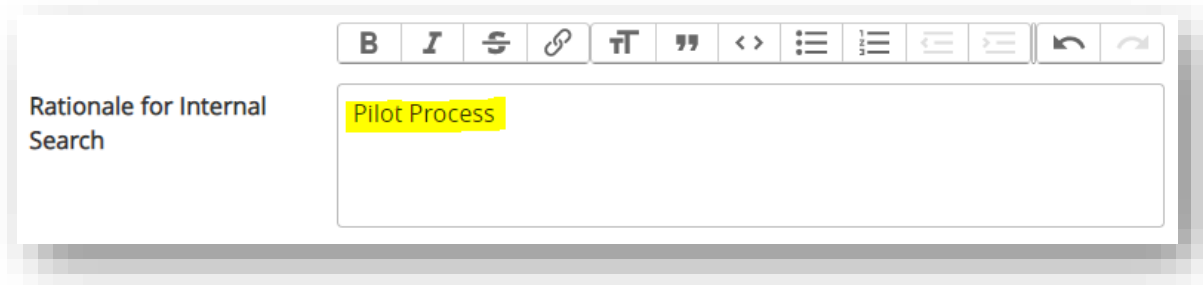


# Filling in the Posting

Please see our [AP Posting guide](#) for additional help filling in the posting. Please start on page 9.

**\*\*Additional step for Postings associated with pilot process\*\***

For tracking purposes, in the Rationale for Internal Search field, please enter 'Pilot Process'. (This field is located on page 18 of the linked AP Posting guide above).



The image shows a screenshot of a text editor interface. On the left, the label 'Rationale for Internal Search' is visible. The text area contains the words 'Pilot Process', which are highlighted in yellow. Above the text area is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), link, text color, background color, bulleted list, numbered list, indent, and outdent.

When you are ready to submit the posting for review and approval, please see the next slide.

# Submitting the Posting to OEO for Final Review and Approval



User Group:  
HR Professional

Note: The HR Professional has the ability to skip standard posting approval points (EO Coordinator and Hiring Authority) and instead, submit directly to OEO.

Take Action On Posting

Keep working on this Posting

WORKFLOW ACTIONS

Submit to OEO Final Approval  
(move to OEO Review and Approval)

## Posting: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Draft

Position Type: Admin Professional/ Research Professional

Department: College of TMS Training (0000)

Created by: Emily Rogers  
Owner: Emily Rogers

1. When you are ready to submit the posting for final review, hover over the Take Action On Posting button and select Submit to OEO Final Approval (move to OEO Review and Approval)

Summary History Settings Associated Position Description

Please review the details of the posting carefully before continuing.

To take move the posting, select the appropriate **Workflow** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List**. in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Tab** in the **Summary Section**. This will take you directly to the **Posting Page** to **Edit**. If a section has an orange icon with an exclamation mark, it is section and make necessary corrections before moving to the next step in the workflow.



# Moving applicants in workflow – Pilot Process

Departments participating in the pilot process are not required to request interviews in the TMS. Instead, applicants/candidates only need to be dispositioned or moved in workflow at the end of the process when the department is ready to submit their hire request.

The following slides demonstrate how to disposition candidates and request a hire.





# Moving Applicants in Workflow – Pilot Process

The screenshot displays the Applicant Tracking System interface. At the top, the header includes the Colorado State University logo, the text 'Applicant Tracking System', and a user profile for 'Emily Rogers' with a 'logout' link. A dropdown menu for 'User Group' is open, showing 'Applicant Manager' selected. The main navigation bar contains 'Home', 'Postings', and 'Shortcuts'. The breadcrumb trail reads: 'Postings / Admin Professional/ Research Professional / Academic Success Coordinator (Closed) / Applicant Review'. The main content area shows the details for the posting 'Academic Success Coordinator (Admin Professional/ Research Professional)', which is currently 'Closed'. It lists the position type, department, and creator. A red box highlights the 'Applicants' tab in the navigation menu. A red callout box points to this tab with the instruction: '1. As an Applicant Manager, navigate to the Posting and select the Applicants tab.' Below the navigation menu is a search bar with a 'Search' button and a 'More Search Options' dropdown.



# Moving Applicants in Workflow – Pilot Process

Active Applicants ×

"Active Applicants" 21 Selected records 8 × Clear selection?

<input type="checkbox"/>	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	Actions
<input checked="" type="checkbox"/>	Pansy				March 10, 2020 at 11:36 AM	
<input checked="" type="checkbox"/>	Vincent				March 10, 2020 at 11:38 AM	
<input checked="" type="checkbox"/>	Gregory				March 10, 2020 at 11:41 AM	
<input type="checkbox"/>	Hannah	Abbott	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 11:43 AM	
<input checked="" type="checkbox"/>	Colin	Creevey	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:40 PM	
<input checked="" type="checkbox"/>	George	Weasley	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:45 PM	
<input type="checkbox"/>	Viktor	Krum	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:50 PM	
<input type="checkbox"/>	Seamus	Finnigan	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:52 PM	
<input checked="" type="checkbox"/>	Dean	Thomas	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:52 PM	
<input type="checkbox"/>	Lavender	Brown	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:52 PM	
<input checked="" type="checkbox"/>	Parvati	Paul	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:58 PM	Actions
<input checked="" type="checkbox"/>	Fleur	Delacour	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:04 PM	Actions
<input type="checkbox"/>	Draco	Malfoy	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:07 PM	Actions
<input type="checkbox"/>	Cho	Chang	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:09 PM	Actions

1. Before submitting the hire request, the Applicant Manager will need to transition applicants who did not meet the minimum qualifications into the workflow state 'Determined did not meet min quals'. To bulk move these applicants (transition at the same time), check the boxes next to the names of the appropriate applicants.

2. Hover over Actions and select Move in Workflow from the drop-down menu.

GENERAL

- Review Screening Question Answers
- Download Screening Question Answers
- Export results

BULK

- Move in Workflow
- Download Applications as PDF
- Create Document PDF per Applicant

https://colostate-sb.peopleadmin.com/hr/postings/65929/job\_applications/edit\_transiti...



# Moving Applicants in Workflow – Pilot Process

Postings / ... / Academic Success Coordinator / Applicant Review / Bulk Workflow Status Change



Editing: Workflow States for 8 Applicants

1. On the next page, select Determined Did Not Meet Min Quals from the top drop-down menu.

Applicant	Current State	Reason	Group Prompt User
Pansy Parkinson	Under Review	<input type="text" value="Determined Did Not Meet Min Quals"/>	
Vincent Crabbe	Under Review	<input type="text" value="Determined Did Not Meet Min Quals"/>	
Gregory Goyle	Under Review	<input type="text" value="Determined Did Not Meet Min Quals"/>	
Colin Creevey	Under Review	<input type="text" value="Determined Did Not Meet Min Quals"/>	
George Weasley	Under Review by Dept/Committee	<input type="text" value="Determined Did Not Meet Min Quals"/>	
Dean Thomas	Under Review by Dept/Committee	<input type="text" value="Determined Did Not Meet Min Quals"/>	
Parvati Patil	Under Review by Dept/Committee	<input type="text" value="Determined Did Not Meet Min Quals"/>	
Fleur Delacour	Under Review by Dept/Committee	<input type="text" value="Determined Did Not Meet Min Quals"/>	

2. Click Save Changes.

Save changes

Cancel



# Moving Applicants in Workflow – Pilot Process

Active Applicants ×

"Active Applicants" 13 Selected records 8 × Clear selection?

<input type="checkbox"/>	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	Actions
<input checked="" type="checkbox"/>	Ha			Under Review by Dept/Committee	March 10, 2020 at 11:43 AM	
<input checked="" type="checkbox"/>	vi			Under Review by Dept/Committee	March 10, 2020 at 02:50 PM	
<input checked="" type="checkbox"/>	Seamus	Finigan	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:52 PM	
<input checked="" type="checkbox"/>	Lavender	Brown	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 02:56 PM	
<input type="checkbox"/>	Draco	Malfoy	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:07 PM	
<input checked="" type="checkbox"/>	Cho	Chang	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:09 PM	
<input checked="" type="checkbox"/>	Luna	Lovegood	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:11 PM	
<input type="checkbox"/>	Neville	Longbottom	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:12 PM	
<input checked="" type="checkbox"/>	Sinny	Weasley	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:13 PM	
<input type="checkbox"/>	Ron	Weasley	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:14 PM	
<input type="checkbox"/>	Harry	Potter	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:44 PM	Actions
<input type="checkbox"/>	Hermione	Granger	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:46 PM	Actions
<input checked="" type="checkbox"/>	Emily	Rogers	201900248AP	Under Review by Dept/Committee	December 03, 2020 at 02:30 PM	Actions

1. Now it's time to transition/disposition all of the applicants that met the required job qualifications yet did not progress to an interview. Select all of the appropriate names.

2. Hover over Actions and select Move in Workflow from the drop-down menu.

**Actions**

- GENERAL
- Review Screening Question Answers
- Download Screening Question Answers
- Export results
- BULK
- Move in Workflow**
- Download Applications as PDF
- Create Document PDF per Applicant



# Moving Applicants in Workflow – Pilot Process



Editing: Workflow States for 8 Applicants

1. On the next page, select Application Reviewed, Not Selected from the top drop-down menu and then the appropriate Reason. If you'd like to provide it, additional rationale can be placed in the Explanation field.

Change for all applicants Application Reviewed, Not Selected ▾

Ranked lower in numerical evaluation ▾  
Explanation:

Applicant	Current State	New State	Reason	Group Prompt User
Hannah Abbott	Under Review by Dept/Committee	Application Reviewed, Not Selected ▾	Ranked lower in numerical evaluation ▾ Explanation: <input type="text"/>	
			Ranked lower in numerical evaluation ▾ Explanation: <input type="text"/>	
Seamus Finnigan	Under Review by Dept/Committee	Application Reviewed, Not Selected ▾	Ranked lower in numerical evaluation ▾ Explanation: <input type="text"/>	
			Ranked lower in numerical evaluation ▾	

Note: If you'd like to disposition applicants into the same workflow state, use the top Change for all applicants selection. If you would instead like to move them into different workflow states, update the New State drop-down for each applicant. Anything selected at the top will automatically apply to every applicant below.

2. When you are ready, click Save Changes at the bottom of the page.



# Moving Applicants in Workflow – Pilot Process

Department: College of TMS  
Training (0000)

Summary | History | Applicants | Reports | Associated Position Description

Saved Searches ▾

Search

More Search Options ▾

Active Applicants ×

"Active Applicants" 5 Selected records 4 × Clear selection?

<input type="checkbox"/>	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date
<input checked="" type="checkbox"/>	Draco			Under Review by Dept/Committee	March 10, 2020 at 03:07 PM
<input checked="" type="checkbox"/>	Neville			Under Review by Dept/Committee	March 10, 2020 at 03:12 PM
<input checked="" type="checkbox"/>	Ron	Weasley	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:29 PM
<input checked="" type="checkbox"/>	Harry	Potter	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:44 PM
<input type="checkbox"/>	Hermione	Granger	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:46 PM

1. Now it's time to transition/disposition all candidates who were interviewed but not ultimately selected. Check the boxes next to their names.

Actions ▾

GENERAL

[Review Screening Question Answers](#)

[Download Screening Question Answers](#)

[Export results](#)

BULK

[Move in Workflow](#)

[Download Applications as PDF](#)

[Create Document PDF per Applicant](#)

2. Hover over Actions and select Move in Workflow from the drop-down menu.

# Moving Applicants in Workflow – Pilot Process

1. On the next page, select Open Pool – Finalist Interviewed, Not Selected next to each candidate name. Select Other from the Reason drop-down and then enter in detailed rationale in the Explanation boxes.

Change for all applicants

Other  
Explanation:

Group Prompt User

Reason

Neville Longbottom Under Review by Dept./Committee

Other  
Explanation:  
Other: Semifinalist Interviewed, Hold: Neville had a really good semifinalist interview. His answer on how he dealt with conflict was the best of the group and it was apparent that Neville knew how to hold his ground when confronted with difficult or uncomfortable situations. While Neville performed well during the interview, there were others in the group that the committee felt did a better job. The committee requests to hold Neville pending outcome of the finalist interviews.

Ron Weasley Under Review by Dept./Committee

Other  
Explanation:  
Other: Semifinalist Interviewed, Not Selected: though Ron had a great semifinalist interview, he failed to prepare for his on-site interview which caused him to fall short compared to the other finalists. His use of humor, while welcome, seemed to irritate attendees at the open forum where some stated that they didn't feel like Ron would be able to be professional if tasked with a serious situation i.e. students with family/mental health/general health concerns. Ron also offhandedly stated during his time with the committee that he 'tends to be a messy person' and that 'filling cabinets and data collection' should be left to the muggles. Both filling and data collection/maintenance are large aspects of this position which caused the committee to question if Ron would be the right candidate.

Other  
Explanation:  
Other: Finalist Interviewed, Hold: While Harry had a fantastic finalist interview, Hermione was nearly perfect, so at this time, the committee requests to hire Harry as an alternate should Hermione turn down our offer. Harry was able to connect with students during his open forum and proved that he would make a great advisor. He fell just short of Hermione in experience and organizational ability.

Note: The workflow 'Open Pool – Finalist Interviewed, Not Selected' is the workflow that needs to be utilized for this search pilot process. This allows you to properly disposition candidates who were interviewed without first having to request the interview in the TMS. Please use this workflow state for any candidate who was interviewed but ultimately not selected for both semifinalist interview and finalist interviews. **Please be sure to mention when in the search process (Semifinalist stage or Finalist stage) an individual was moved out of consideration.**

2. When you are ready, click Save Changes at the bottom of the page.

# Moving Applicants in Workflow – Pilot Process

[Add to Watch List](#)

## Posting: Academic Success Coordinator (Admin Professional/ Research Professional)

Current Status: Closed

Position Type: Admin  
Professional/ Research  
Professional  
Department: College of TMS  
Training (0000)

Created by: Test User  
Owner: OEO

[Summary](#) | [History](#) | **Applicants** | [Reports](#) | [Associated Position Description](#)

Saved Searches ▾

Search

More Search Options ▾

Active Applicants ×

"Active Applicants" 1 Selected records 0 × Clear selection?

Actions ▾

<input type="checkbox"/>	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	(Actions)
<input type="checkbox"/>	Hermione	Granger	201900248AP	Under Review by Dept/Committee	March 10, 2020 at 03:46 PM	Actions ▾

1. Once all applicants/candidates have been properly dispositioned and you are ready to submit your hire request, click on the desired hire's first name.





# Moving Applicants in Workflow – Pilot Process



## Job application: Hermione

Current Status: Under Review by Dept/Committee  
Application form: Administrative Professional - St

Full name: Hermione Granger Created by: Admin  
Address: 123 Main Street, London, United Kingdom (Great Britain)  
Username: hgranger  
Email: hgranger@gmail.com  
Phone (Primary): (012) 345-6789  
Phone (Secondary):  
Position Type: Admin Professional/ Research Professional  
Department: College of TMS Training (0000)

**Take Action** [Close]

Recommend for Hire - EOC (move to Recommend for Hire - EOC)

Reason (required)

Other ▾

Explanation:  
The committee requests to hire Hermione. She performed extremely well during her finalist interview. She received the best feedback during her open forum, was professional yet warm and welcoming during her time with the committee, and impressed

Submit Cancel

2. In the pop-up window, enter in detailed rationale and then click Submit.

1. Once in the hire's job application, hover over the Take Action On Job Application button and scroll down to find Recommend for Hire – EOC (move to Recommend for Hire – EOC)

**Take Action On Job Application ▾**

Keep working on this job application

WORKFLOW ACTIONS

- Send to Application Reactivated (move to Application Reactivated (MUST be prior to full consideration date))
- Request Semifinalist Interview - EOC (move to Request Semifinalist Interview - EOC)
- Request Finalist Interview - EOC (move to Request Finalist Interview - EOC)
- Recommend for Hire - EOC (move to Recommend for Hire - EOC)**
- Recommend for Hire Alternate - EOC (move to Recommend for Hire Alternate - EOC)
- Open Pool - Finalist Interviewed, Not Selected (move to Open Pool - Finalist Interviewed, Not Selected)



# Moving Applicants in Workflow – Pilot Process



Hello Emily Rogers

Hermione Granger has been placed in the Approved Recommend for Hire status for the Academic Success Coordinator position.

As the Hiring Authority you will need to start the Hiring Proposal for Hermione Granger.

For instructions on how to start the Hiring Proposal please see the *How to Initiate and Complete the Hiring Proposal* training guide: <https://oeo.colostate.edu/media/sites/144/2017/05/CSU-How-to-Initiate-and-Complete-the-AP-Hiring-Proposal.pdf>

For help drafting an Offer Letter, please view the templates listed on the Provost's website located here (Note: The templates are located halfway down the page under the header 'Offer Letter Templates'): <https://provost.colostate.edu/faculty-administrative-professionals/>

Job Title: Academic Success Coordinator  
Position #: 012380.0001  
Posting #: 201900248AP  
Department: College of TMS Training

Thank you,

Office of Equal Opportunity  
[oeo@colostate.edu](mailto:oeo@colostate.edu)  
970-491-5836

If you have an issue or questions please see our training website at <http://oeo.colostate.edu/talent-management-system-tms> or email OEO at [oeo@colostate.edu](mailto:oeo@colostate.edu)

Note: Once you have submitted the hire request, the EO Coordinator role will review and approve the request and then send it to OEO for final review and approval. Once OEO has approved the hire, the hiring authority will receive the below email, indicating that a hiring proposal may now be started. For additional help, please see the [hiring proposal guide located here.](#)



# Need further help?

Please visit the OEO website for more resources on the CSU Talent Management System (TMS) at:

[www.oeo.colostate.edu/talent-management-system-tms](http://www.oeo.colostate.edu/talent-management-system-tms)

For assistance/questions regarding the creation of Position Descriptions, please contact the classification/compensation unit in Human Resources at

[hr\\_cca@mail.colostate.edu](mailto:hr_cca@mail.colostate.edu)

