PEOPLEADMIN USER'S GUIDE

Sam Houston State University

Revised 10/2019

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Welcome to the Sam Houston State University Online Position Management and

Important Note:
To increase efficiency, SHSU uses a single sign-on method to access PeopleAdmin.
To access PeopleAdmin:

Click on from the SHSU main page
Then select from the pull down menu
Select the tab from the left-side menu

SYSTEM HELP

At any time, if you have a question, reference the help documentation available in the upper right hand corner of your screen.

POSITION TYPES

Position Types are the core configuration in PeopleAdmin position management. Position types represent the

WORKFLOWS

Approval workflows have already been established in position management and assigned at the department level. This means one user group, at a time, is able to make edits to or change the status

The Home Page

Depending on w
banner across the top of your screen, you are in the Applicant Tracking section of PeopleAdmin. If you have an orange banner across the top of your screen, you are in the position management section of PeopleAdmin.

Faculty postings are created in Applicant Tracking

Staff and Executive Staff requests for new positions, reclassifications of current positions, career path advancements, and replacement of vacant positions are created in Position Management

Items that need your attention - summary views of your inbox and

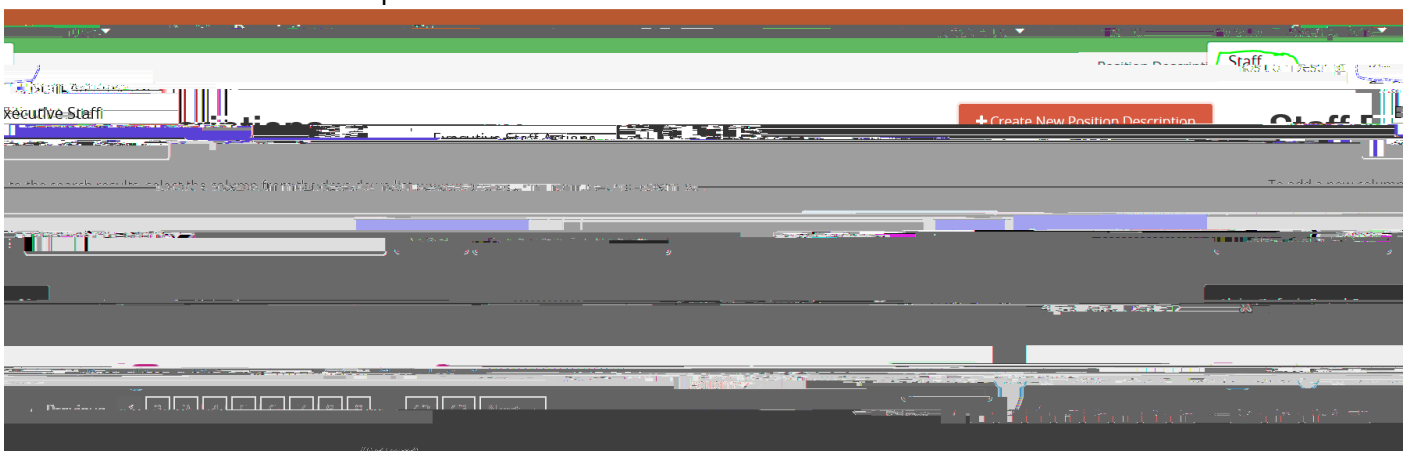
What to Do When You Do Not See the Tab You Need

PeopleAdmin has two modules that users will access. A highlighted area in the

The Request Posting (Replacement) action is used when you plan to replace an existing vacant FTE with a new employee. Typically, no changes are made to the Job Description, simply replacing a terminated/separated/retired employee.

Ensure you are in the Position Management module (Home screen)

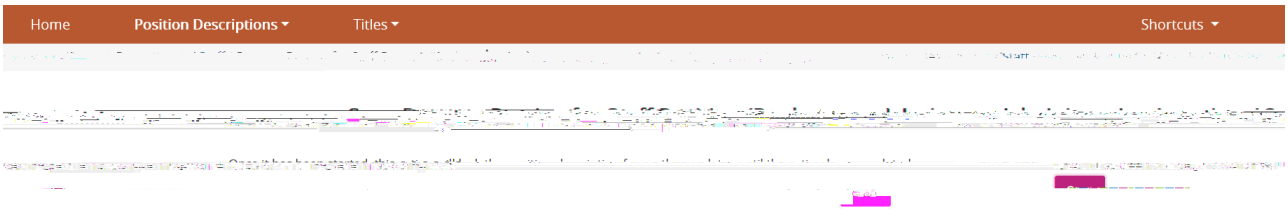
Select Position Descriptions tab



Find the title/employee you want to replace and click on the position title located under the 'Classification' column.

Click "Request Posting for Staff Position (Replacement)" in upper right corner of the screen.

Click 'Start'.



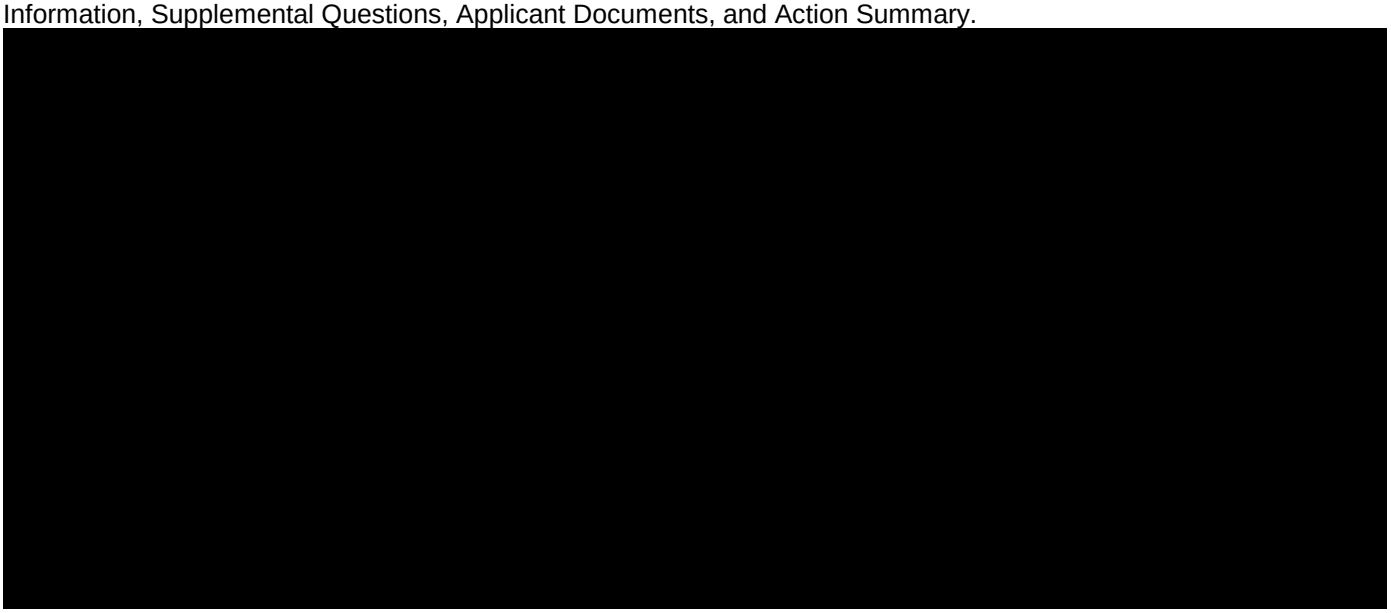
Position Details

Confirm all information in populated fields.

Complete all information in required fields noted with *

NOTE:

located on the left side of the screen. Page links include Position Details, Position Documents, Posting Information, Supplemental Questions, Applicant Documents, and Action Summary.

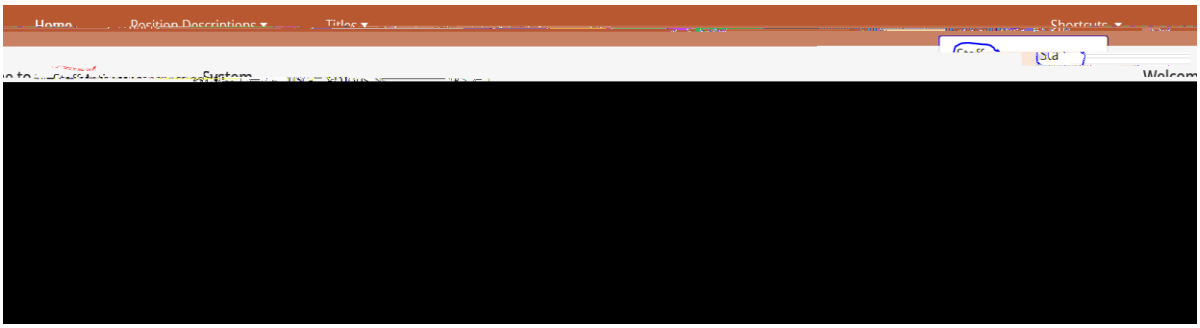


When you are finished checking and/or editing the information on the Position Details screen, click 'Next' to advance to the next screen. By clicking on 'Next', you are also saving the data on the page.

‘Name’ the question indicating the nature of the question and select of question. Type the question in the space provided and select **Open Ended Answers** or **Predefined Answers**. Open-ended questions allow a free-form field for the applicant. Predefined answers

From My Sam, access PeopleAdmin.
You need to be in the position management module (orange banner at top of screen)
Click the Position Descriptions tab, then click ‘Staff’ (not Staff Actions).

A Manager/Designee user will see all positions within the department(s) assigned to their user account.



Select a position from the list that you want to modify. Click the ‘Title’ of this position to start the action.

You should now see the details of t 63all positions w all positions w all positiU:AZ6AZWZ:Z@:aCTèâê

CLASSIFICATION TITLE

You only need to make changes on this page if you want to reclassify the position. If you do not need to reclassify, move on to the next page.

If you do want to request a reclassification, search and select the classification title you would like to associate with your position.

If you are unsure which title to pick, call Human Resources Classifications at 4-1166.

After you have made your selection, scroll to the bottom of the screen and select 'Next' to save your data and move forward.

POSITION DETAILS

On the position details tab, fill in information to update this position.

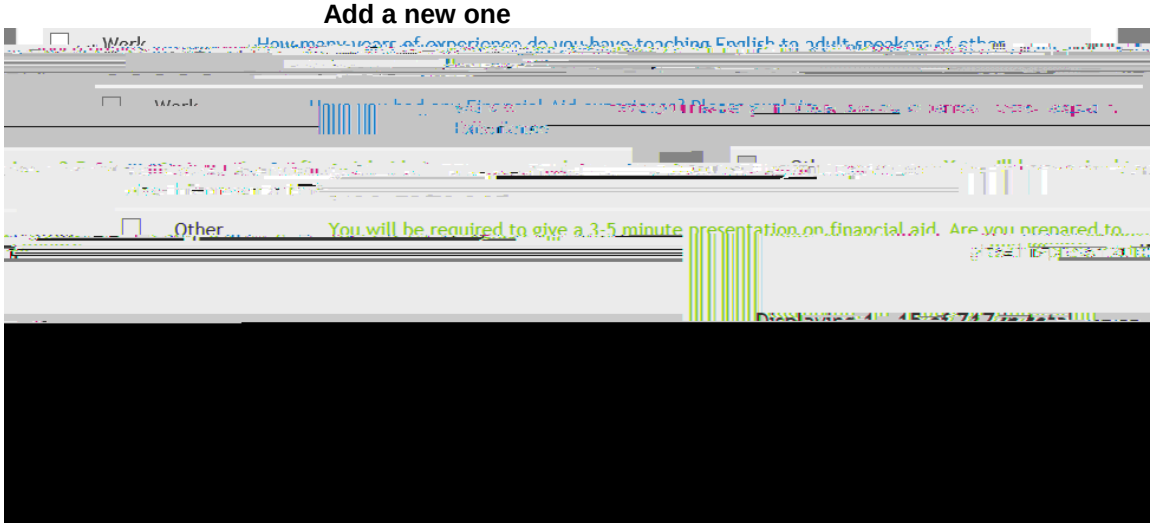
POSTING INFORMATION

Question: Why are we seeing this page? I thought I was requesting to modify a position.
Answer: in order to improve efficiency in the system, we allow Manager/Designee and

To Add a New Question:

If you do not see your question on the list of available questions, scroll down to the bottom of the

Add a new one



'Name'

Type the question in the space provided and select

question will be approved (with modifications if necessary).

Next' to save your data and move forward to the next screen.
This page is also included due to the

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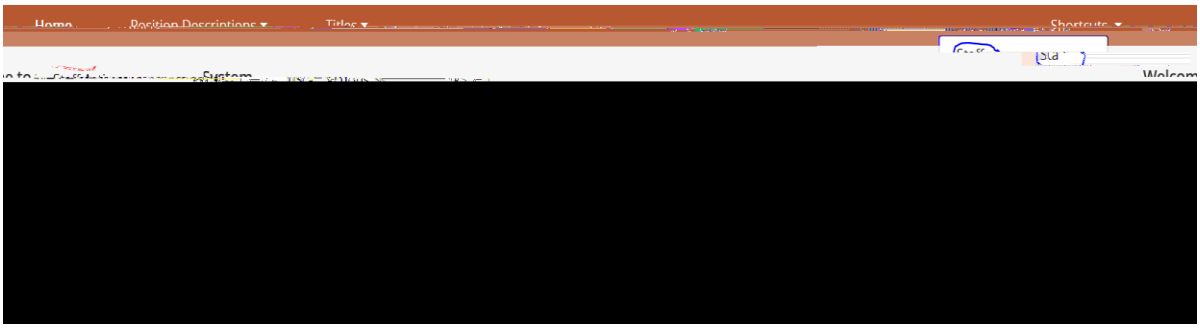
Click the Position Descriptions tab, then click ‘Staff’ (not Staff Actions).

A Manager/Designee user will see all positions within the department(s) assigned to their user account.



NEW POSITION SETTINGS

On this screen, you can title the new position, locate its place within the organizational structure, and clone an existing position if you choose.

Note that you should only clone an existing position to create a new one if the new

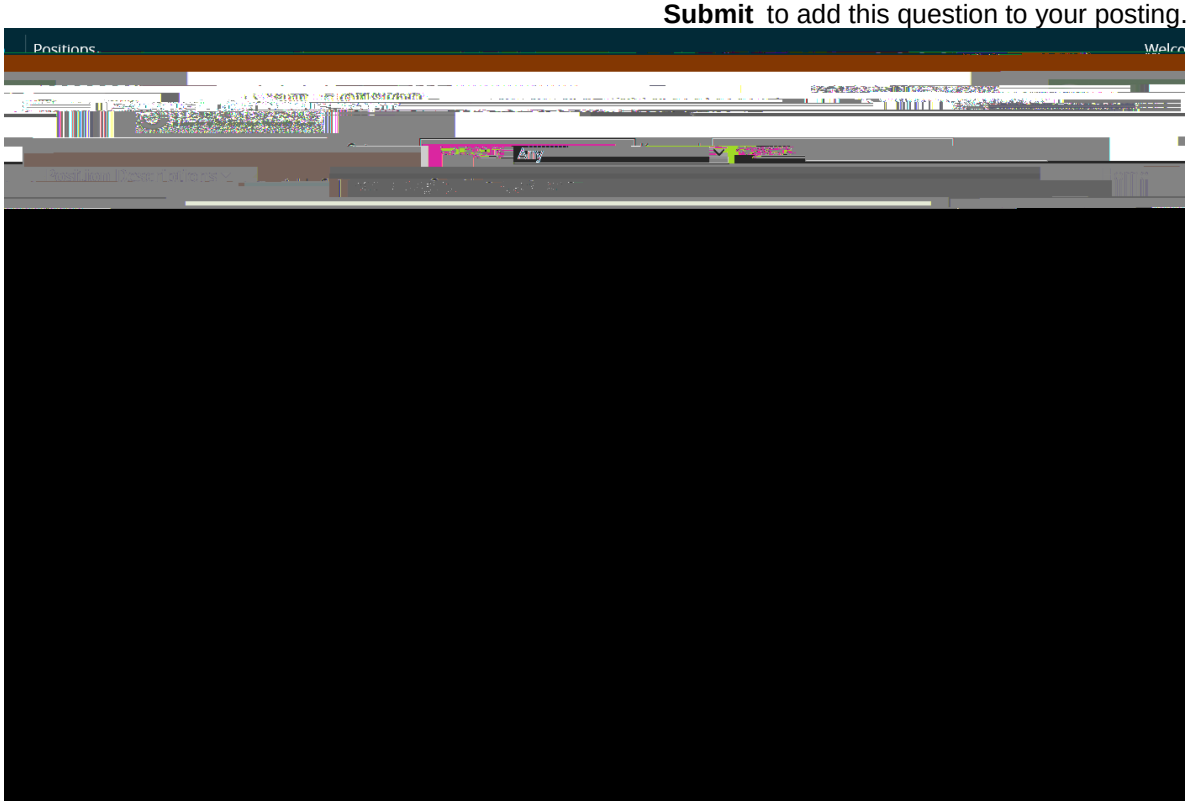
POSITION DETAILS

On the position details tab, fill in information to complete your new position.

This page contains most of the pertinent details for the new position. Fill out the information on this page to match the requirements for the position

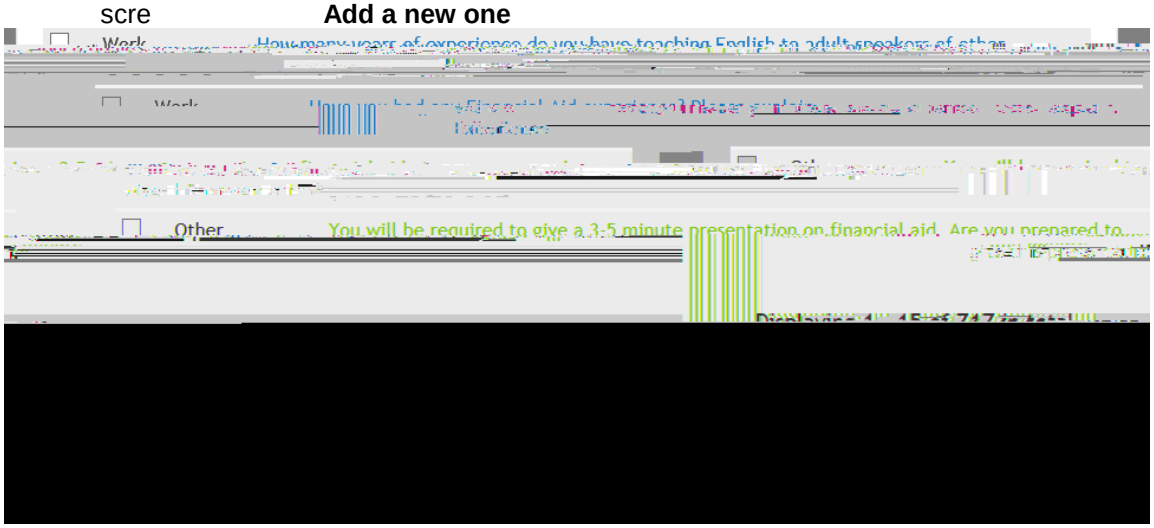
Browse through the list of available questions and select your question.

Submit to add this question to your posting.



To Add a New Question:

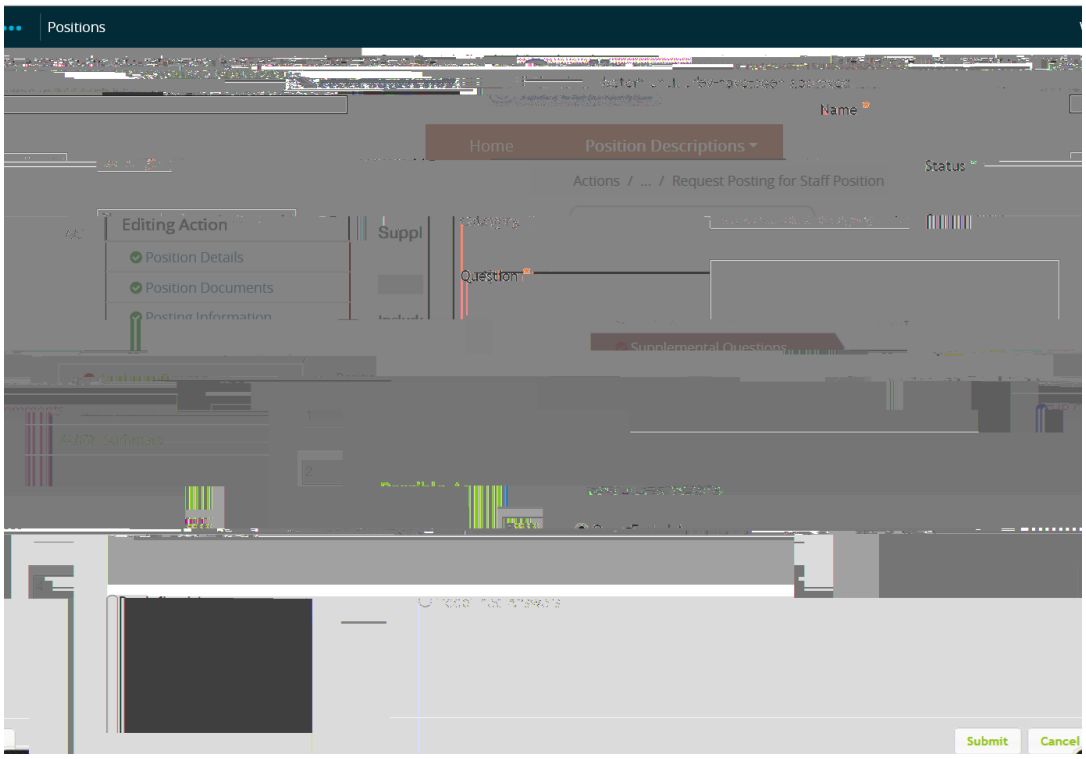
If you do not see your question on the list of available questions, scroll down to the bottom of the scre **Add a new one**



‘Name’

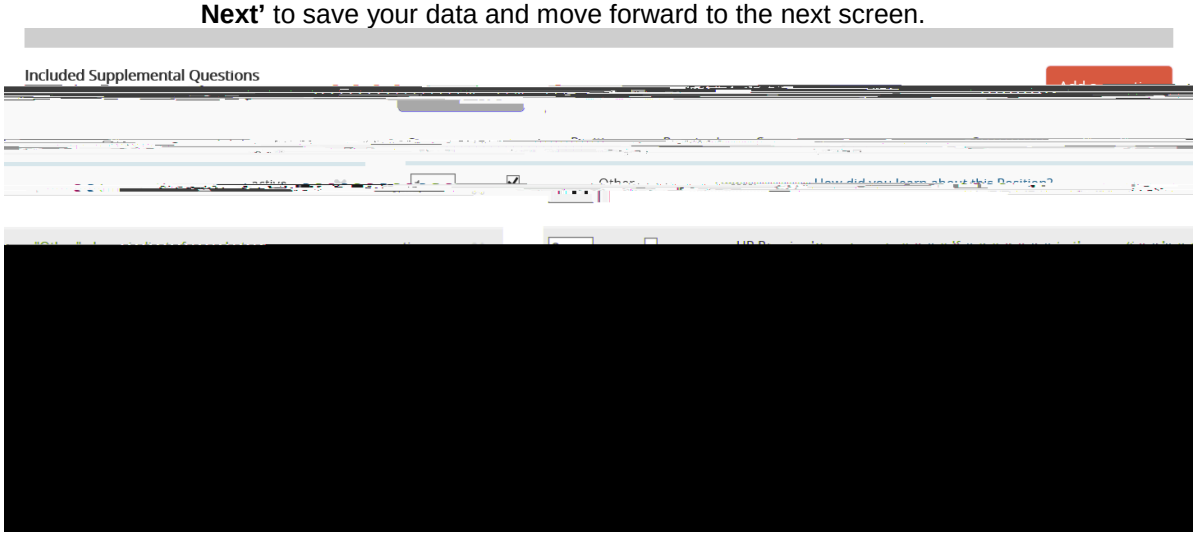
Type the question in the space provided and select **Open Ended Answers** or **Predefined Answers**. Open-ended questions allow a free-form field for the applicant. Predefined answers are answers identified by the department, provided to the applicant.

Submit



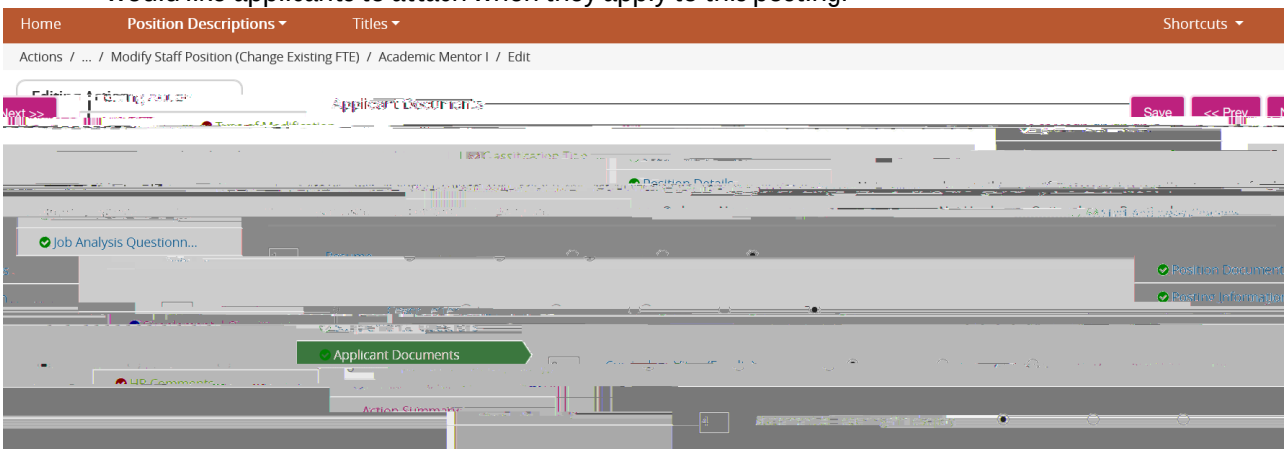
status of the new question below. As the HR Manager reviews the posting, the new question will be approved (with modifications if necessary).

Next’ to save your data and move forward to the next screen.



APPLICANT DOCUMENTS

On the Applicant Documents page, you will be able to specify which document you would like applicants to attach when they apply to this posting.



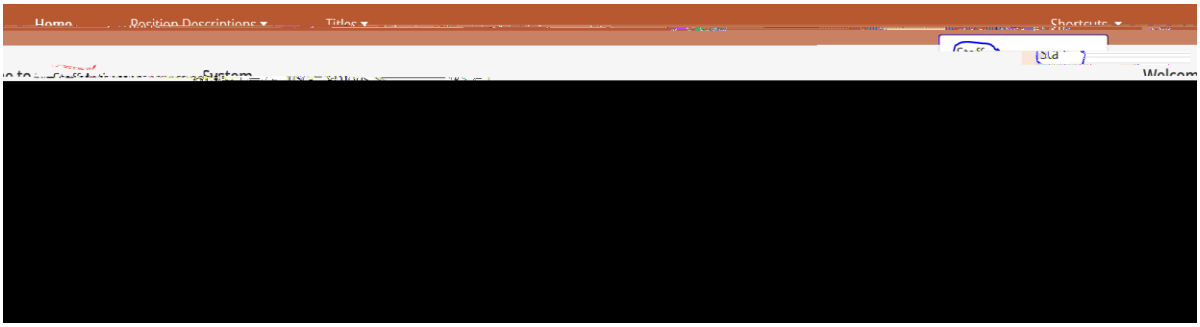
This page is also included due to the 'bundling' concept defined above. If you are not requesting a posting, you can bypass this page.

Here are some details on working with Applicant Documents:

You do have the ability to

From My Sam, access PeopleAdmin.
You need to be in the position management module (orange banner at top of screen)
The Career Path Advancement is a much-abbreviated action.
Click the Position Descriptions tab, then click 'Staff' (not Staff Actions).

A Manager/Designee user will see all positions within the department(s) assigned to their user account.



Select a position from the list that you want to modify. Click the 'Title' of this position to start the action.
You should now see the details of the position and in the top right corner of your screen you should see the options below.
If you do not see these options but instead see Print Preview and View Outstanding Action, the position you want to modify already has an outstanding action against it. In order to proceed, you will need to Search Staff Actions, find the action against this position and either approve or cancel it. For data

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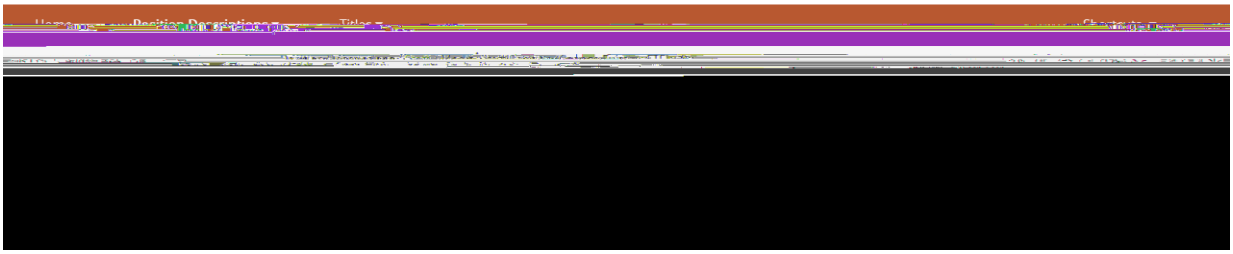
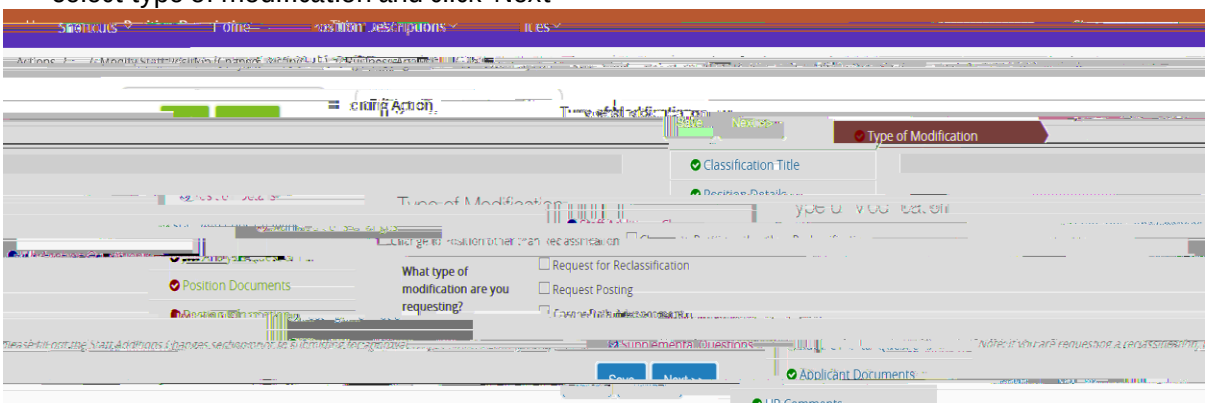
You will now see a message telling you that the action will lock this position once started. Click the 'Start' button.



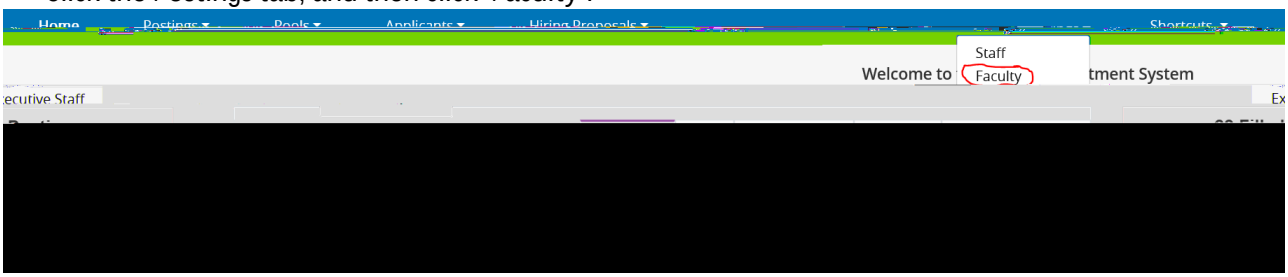
TYPE OF MODIFICATION

Career Path Advancement – this modification is designed specifically for positions on a Career Path, to move the position from one level to the next. It is an abbreviated process, which differs from a regular request for reclassification and can only be used for career path positions.

Select type of modification and click 'Next'



From My Sam, access PeopleAdmin.
You need to be in the Applicant Tracking module (blue banner at top of screen)
Click the Postings tab, and then click ‘Faculty’.



To create a new p ş ʊ

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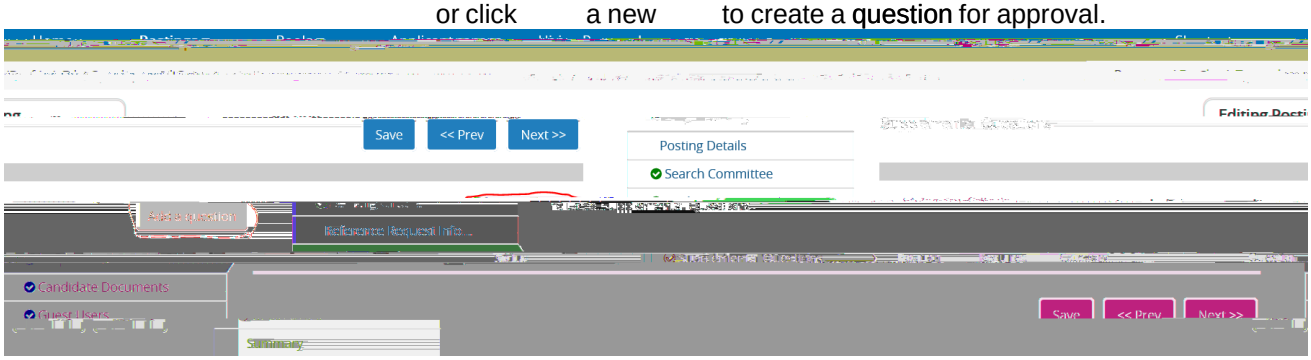
Search Committee
The Search Committee screen allows the “posting

questions.
Click the question name to expand the view to include the complete question and possible answers.

NOTE: The Human Resources department includes two screening questions to each posting. The questions are regarding how the applicant became aware of the posting.

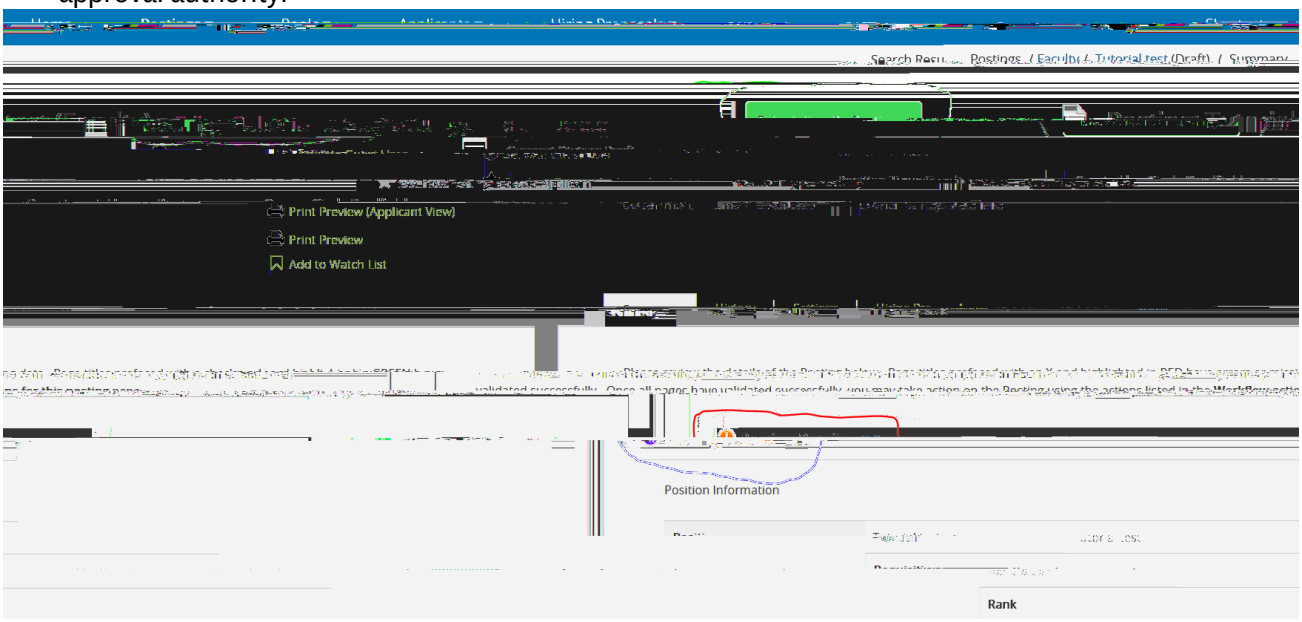
Click the **Add a Question** to add a question to the posting. Choose from the or click a new to create a question for approval.



To Add a New Question:

Summary

After entering all necessary information on the action form, select the 'Summary' page from the left hand navigation bar.

If all sections are marked with a Green indicator, then the action has passed the validation test. If an Orange indicator appears at any section, click on 'Edit' next to the page name to return to the Edit view of the action to correct any issues on this screen before submitting the action again.

Select the 'Take Action on Posting' dropdown menu and move the action to the next approval authority.