



Human Resources Transaction System
 User Manual
 QAPD TESTING

User Roles	Pg 2
Navigation	Pg 3
Procedures: Position Request	Pg 3
Actions:	
New Request	Pg 4
Clone Existing Request	Pg 4
View Saved Request	Pg 4
View Submitted Request	Pg 4
Approve Request	Pg 5
Add Additional Approver	Pg 5
Add Attachments	Pg 5
Create PDF	Pg 5
Field Definitions: Position Request	Pg 7
Tips for Managing Requests	Pg 9
Request User Role Change	Pg 2

HRTS User Roles

Request Approval Workflow: Submitter ➡ HR QA Approval ➡ Dept Approval (optional) ➡ Dean/Director Approval
 VP Approval ➡ Budget Approval ➡ Final HR Approval *Ad Hoc Approval (optional) can be inserted at any approver level

Submitter:

- Has access to HRTS system and ability to submit a request
- Responsible for accurately submitting all required information
- Can SAVE request intermittently without SUBMITTING (saved requests will not move forward for approval)
- Can designate a Department Level Approver (optional)
- Can view request status at any time
- Will receive email notification when request is submitted and upon final approval or any denial
- Submitter, date, and time will be recorded and displayed
- **If Submitter is also an Approver:**
 - After HR Quality Review the request will automatically be self-approved at submitter approval level and be forwarded for next level approval
 - Can add Ad Hoc approver if additional approver desired

Dept Approver, Dean/Director Approver, VP Approver:

- Has all Submitter rights above
- Will receive email notification when a request is pending their approval
- Approve/deny a request which automatically forwards to next approval group or returned to submitter if denied
- Option: Add additional an AD HOC approver to the request approval chain from AD HOC group
- Option: Add comments or attachments to a request
- Can change/add account information
- Approval at each level is required on Position Request prior to being able to hire
- **If multiple users in approval group**
 - All approvers in group will receive email notification of a pending request
 - Only one approver in an approval group can approve a request
 - If submitter is also an approver, after HR Quality Review the request will automatically be self-approved at submitter approval level and be forwarded for next level approval

Ad Hoc Approver (Additional Approver for specific request)

- All Approver rights above

HR QA Approver (HR ONLY)

- All submitted requests will be reviewed for classification and compensation approval by HR professionals before moving forward for organizational approvals

Budget Approver (BUDGET ONLY)

- All requests must identify sufficient funding to be approved by Senior Budget Analysts

HR Final Approval (HR ONLY)

- An indication that all required approvals, documentation and, if applicable, ODI approval has been secured to launch search
- Email will be generated to submitter once approved

****Email HR Contact to Add/Update User Role Access****

HRTS Navigation

PeopleSoft link to HRTS in test environment:

- <https://psdevel.itsli.albany.edu/menu/menu.html>
- Select HE90QAPD from the dropdown options
- Preferred browser is Firefox

Username: UA netid – all caps

Password: QAPD{YOUR INITIALS}{BIRTH MONTH BIRTH DAY}! -all caps

Example: QAPDBS0425!

Via PeopleSoft (IAS) menu:

UAHR Custom Addons/UA HR Transaction System{HRTS}/Position Request

- Position Request Submit- submit new request or access a saved request
- Position Request Approve – to approve/update a pending request (approvers only)
 - Note: approval can only occurring when it is pending at your approval level
- Position Request Inquiry– to view any request (not yet approved, pending approval, approved, denied)

Via HRTS email notification

- HRTS email notifications will come from jobreq@albany.edu in test (Production will be HRTS@albany.edu)
- Click the link in the email notification regarding a specific request
- Login will be required if not already signed into IAS
- Note: if multiple approvers at a single approver level, once any one approver acts on the request, the email link will no longer be active for approval

Via HR Website

<https://www.albany.edu/hr/hrts.php> (you must use this link directly, it is not published on our website yet)

HRTS Procedures

Position Request (Prerequisite to All Hires)

No faculty/staff hire can be made until a position request is approved (excluding PT lecturers at this time). This includes temporary positions and positions that are exempt from search requirements or have an approved waiver. Appointments for hires that do not have an approved position may be delayed or denied. Please ensure all faculty and staff who make hires are aware of this requirement.

All requests to fill or change a position must be submitted through HRTS for Human Resources classification and compensation approval as well as divisional and Budget Office funding approval. This includes requests for:

- Filling an existing vacancy (same duties as prior incumbent)
- Creating a brand new position (including temporary, part-time or short-term positions exempt from a formal search)
- Reclassifying a vacant position based on changes to duties/responsibilities

[{top}](#)

- Reclassifying a filled position based on the assignment of additional duties/responsibilities of a higher level

Requests must include a detailed **job description** which identifies primary duties/responsibilities and reporting relationships. An **organizational chart** showing where the position fits in the unit is also required for all permanent positions. Positions that will be searched must also include a **Recruitment Plan**.

Requests will receive initial Human Resources Quality Assurance Review upon submission. Once classification, compensation and other position attributes have been agreed upon and approved by HR, the request will move through the approval chain within your division, then on to funding approval by Budget Office staff. Final approval to fill requested position will come from Human Resources after confirming all approvals, required documentation and, if applicable, ODI approval of your recruitment plan are received.

SUBMITTER ACTIONS

New Request

- Navigate to HRTS Position Request Submit
- Defaults to ADD new value, click ADD
- Complete Request (See Position Request Definitions)
- SAVE or SUBMIT request (saved requests will not move on for approval)
 - Budget title and Department are minimally required to SAVE
 - All * fields and Job Details page is required for SUBMIT

Clone Existing Request- copies all elements of a previous request

- Navigate to HRTS Position Request Inquiry
- Search for previously submitted Position Request
- Copy or make a note of the Position Request #
- Navigate to HRTS Position Request Submit/ADD
- Enter/Paste Position Request # you want to Clone
- Click the CLONE button
- All information from existing Position Request will populate, including job description. A new Position Request # will be assigned when saved or submitted
- Review and update information for current request
- SAVE or SUBMIT request (saved requests will not move on for approval)
 - Budget title and Department are minimally required to SAVE

View a Saved Request (not yet submitted)

- Navigate to HRTS Position Request Submit/Find an Existing Value
- Only Saved but not Submitted requests can be searched here
- Narrow search using search criteria
- Can view all requests based on departmental security
- Complete the request and submit
- You can also view a saved request under Position Request Inquiry but you can only view it, not change or submit from Inquiry

View a Submitted Request

- Navigate to HRTS Position Request Inquiry (view only)
- Narrow search using search criteria
- Can view all requests based on departmental security

- Can view current request status and search by status
- Can create a pdf of request

Add Attachments to Position Request

- From the Attachments tab, click ADD
- Browse and select document
- Repeat for multiple attachments
- You can leave comments about the attachment on this page
- Do NOT attach job description, must complete Job Details fields

Create PDF of Position Request

- Click the Create PDF button at the bottom of the first tab
- One PDF will be created for both tabs
- Print or save PDF

APPROVER ACTIONS

Submit a Position Request

- See Submitter Actions above

OPTION: ADD Additional Approver (AD HOC) * must be added before approving request

- On the workflow map at the top of Position Request, select the '+' to insert an additional approver after your approval level
- An Ad Hoc approval window will appear
- Select from Ad Hoc approver list (not department specific, make careful selection)
- Keep Approver radio button selected (do not use Reviewer)
- Approve request to generate email notification to Ad Hoc Approver selected that request is pending their approval

Approve/Deny a Position Request

(if multiple approvers at a level, all will be notified of pending request, only one can approve/deny)

- Navigate to HRTS Position Request Approve or via link in email notification
- Review request including Job Details tab
- Modify account information if necessary
- Add comments or attachments (optional)
- APPROVE: request will move to next Approver Level in workflow
- DENY: submitter will be notified via email

-

View a Saved Request (not yet submitted)

- Navigate to HRTS Position Request Submit/Find an Existing Value
- Only Saved but not Submitted requests can be searched here
- Narrow search using search criteria
- Can view all requests based on departmental security
- Complete the request and submit

- You can also view a saved request under Position Request Inquiry but you can only view it, not change or submit from Inquiry

View a Submitted Request

- Navigate to HRTS Position Request Inquiry (view only)
- Narrow search using search criteria
- Can view all requests based on departmental security
- Can view current request status and search by status
- Can create a pdf of request

Position Request Field Definitions

Request Type	
FILL: Fill a vacant position	Existing vacancy with same duties/responsibilities
NEW: Create new position	Additional position to the department
RE-FILL: Reclassify a vacant position	Or additional duties/responsibilities to an existing vacant position which warrants new title review (within same position type)
RECLASS: Reclassify a filled position	New or additional duties/responsibilities assigned to a filled position which warrants a new title review (within same position type)
Position Type	
CLASS: Classified	All civil service titles
FAC: Faculty	All teaching faculty titles
PROF: Professional	MC, UUP (non-teaching faculty) titles, casual titles
Recruit Type	
AD/NO SEARCH	Post and advertise even though position is exempt from required search https://www.albany.edu/hr/search-exceptions-waivers.php
NO SEARCH	Position exempt from required search or has approved ODI search waiver, https://www.albany.edu/hr/search-exceptions-waivers.php , fill once approved
SEARCH	Search required
Number of Positions	Can select more than one if filling multiple identical positions
Search Waiver	Do you have an approved waiver from ODI for a position required to be searched
APPOINTMENT	
Temporary Appointment	Typically YES if position duration one year or less, up to 3 yrs for visiting faculty and post docs
Obligation Type	Academic Year Calendar Year
Duration	Position not temporary, typically 1 year term for professionals, up to 3 year term for faculty. If Other, must specify
Proposed Effective Date	Anticipated fill date or, for reclassification of filled positions, <i>future</i> date of new/additional duties once approved
End Date	Required for Temporary positions
Obligation %	Full-time 1.000 Part-time <1.000
Hours	Number of hours worked per week, note: schedule will be assumed to be distributed equally each day and constant (i.e. 20 hrs= 4 hrs/day M-F every week) unless noted otherwise in comments. This will be used in daily rate of pay calculations for vacation payouts, benefit eligibility determination, retirement service credit, etc. It's important to convey accurate information. If it will vary greatly indicate in comments.
Shift	Days or Nights: shift falls primarily between 6pm and 6am, entitled to night pay
Pass Days	days off (NYYYYYN= works M-F, Sat/Sun off)
Supervisor	Immediate supervisor of record, responsible for performance programs/evaluations, time record approval

POSITION	
Line Item	Leave blank for new positions
PSR or TS	Refers to funding source (not appointment type)
Proposed Salary Range	Identify actual salary or range for searched position
Estimated Cost	For short term or hourly positions
Incumbent Status	Filled/Vacant, leave blank for New positions
Current or Most Recent Incumbent	Select if applicable
Proposed Budget Title	Select, HR will make final determination based on duties/responsibilities
Proposed Campus Title	Descriptive, will be assigned Budget Title if not provided. Can NOT use different Budget Title.
Department	Select from list
ACCOUNT	
Account	Choose from valid acct list
Funding Type	DIFR, IFR, State
Distribution Percent	Total from all accounts must equal 100
New Funding Source	Identify source funding if account not established
JUSTIFICATION	
Any additional information useful for approval. Required for new classified positions for submission to NYS Dept of Civil Service	
DEPARTMENT APPROVER(S)- OPTIONAL	
If departmental procedures require a department level approval, other than submitter, select approver here. After HR quality assurance review, request will proceed to departmental approver, if selected, prior to moving to Dean/Director level approval. If no department approver selected, request will move directly to Dean/Director level approval after HR quality review.	
COMMENTS	
Required for part-time schedule variations or other appointment details	
SAVE	
If request not complete, you can SAVE your work to return to it later. SAVED requests will not move on for approval	
SUBMIT	
Moves request onto HR Review and Approval. All required (*) fields must be completed, including Job Details page.	
JOB DETAILS (Tab 2)	
Complete all fields for job description. You can cut and paste from another document. Will be used for job postings in Interview Exchange.	
ATTACHMENTS	
You can attach documents to your requests. Org charts, recruitment plans, etc. You can leave comments regarding your attachments if necessary. Do NOT attach job description, you must complete Job Details fields.	

Tips for Approvers to Manage Requests

- All Approvers should set up email filters to move system notifications to a specific folder so they don't get "lost" in inbox
 - ITS instructions for setting up email filtering rules:
<https://wiki.albany.edu/display/public/askit/Creating+A+Conditional+Forwarding+Rule+Using+OWA>
- All system emails will come from jobreq@albany.edu
- Because all approvers within an approval group will get pending approval notifications, you need to determine who will review and act on which requests. The following information will be provided in the notification email about the pending request:
 - Budget title, Department
- Once a request is approved by anyone at that level, the link in the email notification will no longer access the pending request. You can view through Position Request Inquiry menu.
- Managing requests from the IAS (PeopleSoft) menu instead of email notification will enable the sorting and filtering of requests

Coming Soon:

- Position Request Approve menu search will only display the items pending your action at your approver level