Instruction Set: Manage Approval Workflow
This instruction set will show you how to review your pending requests, approve or deny a request, and manage any requests of your own which have been denied.

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ACCESS MANAGER SELF SERVICE

From the main Boise State University website, click on the link to my.boisestate at the top of the page, as shown in the illustration below.

On the my.boisestate page, click the Faculty/Staff sign in link:
A login window will appear. Log in using your Boise State username and password. If you are still logged in to my.boisestate from a previous session, you would skip this step and be taken directly to the page shown in the following step.
Click on the PeopleSoft link:

The home page for PeopleSoft will appear and it should look similar to the one shown in the illustration below. There may be a slight variation in the layout of the page depending on your browser/zoom settings or what you have access to. First check to see which system you are working in (indicated in the yellow highlighted area below). You’ll notice below that this person is working in the Student Administration system. Approval Workflow cannot be accessed in the Student Administration or Financial Information systems. Click the Human Resources link (green box) to move into the HR system.
You will know you’re working in the Human Resources system if you see “HR” up at the top next to your username (see red box below).

Next, locate the Candidate/Employee Transaction link in the HR Self Service box and click on the link:
MONITOR YOUR STUDENT HIRE REQUESTS

Upon clicking “Candidate/Employee Transaction” a new page will appear and it will feature 2 options that will help you locate pending hiring requests (see illustration below). Option 1 allows you to search for a specific request from all hiring requests on record for your department. Option 2 provides a quick and easy way to view your requests which are either pending, canceled, or completed.

Let’s start with Option #1. If you want to move ahead to the instructions for Option #2, please skip forward to the bottom of page 7.

**Option #1: Using Candidate Hire Search**
Click the “Candidate Hire Search” option (item #1 below):

![Candidate Hire Search Option](image)

Continue to next page....
After clicking “Candidate Hire Search” you will arrive at the page shown in the screen shot below. Here you can locate any hiring requests within your department by entering search criteria into any combination of the available search criteria fields (green box below). There are also lookup buttons (🔍) you can use to find specific pieces of criteria for your search. Here is a summary of how each search criteria can be used:

- **Hire Type** is used to find hire requests for either work study or non-work study students.
- **Hire Status** is used to find hire requests that have a certain status, such as:
  - **Awaiting Approval** - requests in the approval workflow process
  - **Cancel** - canceled hiring requests
  - **Hired** - hires that have been committed to the PeopleSoft database
  - **Ready for Hire** - hires which are fully approved but not yet committed to PeopleSoft
- **First Name** and **Last Name** are used to find a hire request for a specific student
- **HR Dept ID** is used to find a hire request for a specific department (use 5-digit dept. ID number)
- **Supervisor ID** is used to specify the employee ID of the supervisor assigned to one or more hire requests
- **Funding Source** is used to find hire requests that are funded by a specific funding source
- **Initiator** is used to find hire requests initiated by a specific person (use the lookup button)
- **Approver** is used to find hire requests that have a specific approver in their workflow chain
- **Employment Start/End Date** is used to locate hire requests that start/end within a date range

After entering your search criteria click on the Search button. Search results will appear below the search window:
Two types of links are embedded in the search results (see red boxes, previous page). One is in the **Name** column, the other is the **View** column. In the **Name** column if you click on the candidate’s name it will take you to their 2-page hire request form (example #1 below). If you click on **View** in the View column, it will take you to a page that summarizes all the form data you entered (example #2 below) and gives a snapshot of the approval workflow process and the status of approvals.

### Option #2: Using *Hire New Candidate Status*

Using *Hire New Candidate Status* is a quick and easy way to **view** your hiring requests. You’ll be able to view requests which are pending, canceled, and completed. Click the “Hire New Candidate Status” option (item #2 below):
After clicking *Hire New Candidate Status* you will see the screen below. The first section (green box) lists all of your current pending hiring requests. These are requests that you’ve started but have not actually submitted for approval. Click on the candidate’s name to gain access to the form so that you can complete it and submit (or resubmit) it for approval. **This section also serves as the destination for any of your requests that have been denied. For information on how to manage a denied request, please see Step 18 on page 15 of this document.**

The second section (blue box) shows any of your hires that have been canceled.

The third section (red box) displays the requests that are complete and have been committed to the PeopleSoft database. There are none listed in the example below, but this is the section where you’ll find your hired employees.
There are 2 ways to find out if you need to approve a hiring request. The first is via an email notification. Here’s an example of this notification.

A request is awaiting your approval.
Transaction Name: Approve Student Hire
Employee Name: [Redacted]
Employee Id: 1

To approve or deny this request, go to:

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

To complete your approval decision, click the hyperlink that appears in the notification message shown above. You will be taken to the PeopleSoft login screen (below) unless you already have PeopleSoft open in another window. Log in to PeopleSoft by entering your university username and password.
You’ll arrive at the Candidate Hire Approval screen (see below). This screen shows you the hire data that was submitted and provides you the opportunity to approve or deny the request. Review the information then click the Approve or Deny button at the bottom of the page (green box below). If you deny the request, you must leave a comment (orange box) so the initiator knows why the request was denied.
The other way to approve a hiring request is to access the request via your Worklist in PeopleSoft. Whenever you log in to PeopleSoft, you can use the Worklist feature by clicking “Worklist” as shown below.

When you click on Worklist you will be taken to a screen (shown below) which shows pending tasks that require you to take some kind of action. The tasks are listed in a table with the following column headings (from left to right):

- **From** – this is the person who last submitted (or reviewed and approved) the request
- **Date From** – this is the date of the previous submittal or approval
- **Work Item** – the type of work item describes the action the system took
- **Worked By Activity** – describes the type of workflow that assigned this item to you
- **Priority** – for your use to prioritize items in the worklist as 1 High, 2 Medium and 3 Low
- **Description** – name of the candidate who is being hired
- **Link** – click this link to be taken to the Candidate Hire Approval screen shown in step 15

Once you arrive at the approval screen shown in step 15, follow the instructions given for that step.
HOW TO DENY AN APPROVAL REQUEST

To deny a request, after arriving at the approve/deny screen shown on page 10, first type in a comment in the comment box explaining the reason the request is being denied. For example, perhaps the funding sources are no longer valid:

Once you have finished typing your explanation click the Deny/Send back for Revision button. The message below will appear on the screen indicating your denial was processed correctly. This will send the hiring request to the Canceled hiring requests list for the person who originally submitted the request. That person will also receive an automated email notification telling them their request was denied. They can then decide to resubmit it or delete the request altogether.

![Comment Box]

The funding sources you selected are no longer valid. Please use the grant account we talked about yesterday.

Approve  Deny/Send back for Revision

Hire New Candidate
Submit Confirmation

The Submit was successful.

OK
HOW TO MANAGE A DENIED REQUEST

If you submitted a hiring request and your request was denied, you’ll receive a notification such as the one below. Click the hyperlink in the email notification to view the denial and the comments explaining why the request was denied.

Upon clicking the hyperlink in the email notification above you will be taken to a PeopleSoft login screen (unless you are already logged in to PeopleSoft). Log in using your BSU username and password. Upon logging in, a screen will appear (below) showing a summary of the hiring information you submitted as well as an illustration of the approval workflow. You will notice in the approval workflow illustration that the request was denied by the first approver. As a result of the denial, the remaining approval steps are canceled, or “Terminated”.

[PeopleSoft login screen image]

[Approval workflow illustration image]
To see why your hiring request was denied, go down to the bottom of the screen summary and click the **Comments** button (green below).

You will see the comments box open (below). Based on the reason for denial, you may choose to modify the form and resubmit it. Or you might decide to cancel the hiring request altogether. Move to the next steps to learn how to execute each option.

To modify your hiring request and address any issues related to the denial decision, access your pending hiring requests by clicking “Home”, then “Candidate/Employee Transaction”, then “Hire New Candidate Status”.

![Diagram of navigation steps](image-url)
In the Pending Hires list find the hiring request that was denied by locating the name of the candidate you were hiring. Click on the candidate’s name.

After clicking the candidate’s name you will be taken to the first page of the original hiring request form. Navigate through the form by clicking the “Next” button and make whatever changes are required to get your request approved. On the final form page click “Submit” to resubmit the request for a second attempt at approval.