Approver Guide

Revision History

Date	Revision
March 3, 2021	Guide Creation

Introduction

The Office of Human Resources has implemented this system in order to automate all personnel transactions on campus. This training guide focuses on the following actions in BP Logix:

1. How to review and approve PTF requests

Access within the System

Each user on campus has been categorized into a particular user group, which provides them certain permissions in the BP Logix system. Please see below for a brief overview of access granted to different types of users:

Role	Access Level
Requestor	Allowed to enter a PTF and view PTF's they have submitted
Approver	Allowed to review and approve PTF's assigned to them
College UBO	Allowed to approve PTF's assigned to them and view all PTF submissions for their College

Modes of Training

The recruitment team in the Office of Human Resources understands that every individual has a different learning style. Please see below for the various modes of training offered on this piece of the BP Logix system:

If you would like to have an in-person or Microsoft Teams meeting with a member of the recruitment team to walk you through creating a PTF, please contact the college/department recruitment and hiring contact for your area or call the Office of Human Resources at 920-424-1166 and schedule a time for this meeting.


If you would like to have a member of the recruitment team walk you through creating a PTF over the phone, please contact the college/department recruitment and hiring contact for your area or call the Office of Human Resources at 920-424-1166.

If you feel comfortable solely using this training guide to create your PTF, this is acceptable. Please know that a member of the recruitment team may reach out to you if there are any follow up items up for discussion.

Homepage Tips

When you log in to BP Logix, you should see a homepage similar to this one. Please familiarize yourself with the options on this page.
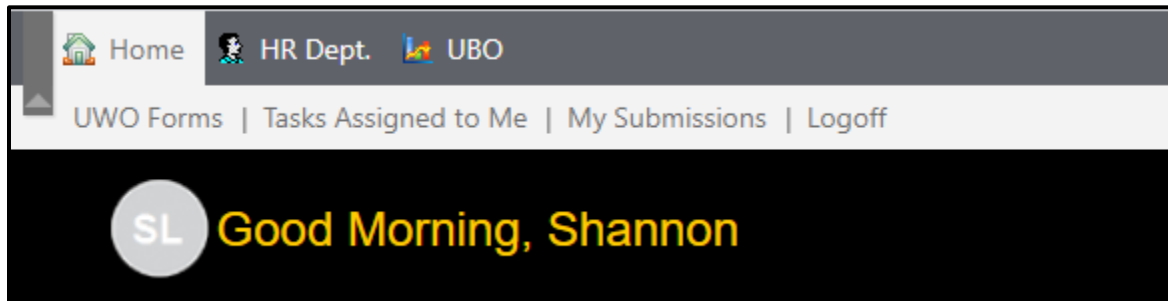
1. UWO forms - The BP Logix system will be used for multiple forms across campus. This tab lists all the forms you have access to submit.
2. Tasks assigned to me - Requests listed here require your review and approval.
3. My submissions - All active and complete requests you have made can be viewed here.
4. Logoff - Use this link to ensure you securely log out of the system.

To log into the BP Logix system, you may follow the link below:

uwosh.bplogix.net

Your username and password is pre-set as your **NetID**.

Step 1: Log into BP Logix – Email Notification

When you have a request to approve, you will be prompted via email from *UWO Office of Human Resources*. This email will contain basic information regarding the request and a link to bring you to your task list within BP Logix. From there you will be able to review information regarding the request.

Step 2: Reviewing and Approving the PTF Request

As mentioned in step 1, when you click on the link in the email notification, you will be directed to your "Tasks Assigned to Me" dashboard. Click on the transaction and it will open a new page with the details of the PTF Request.
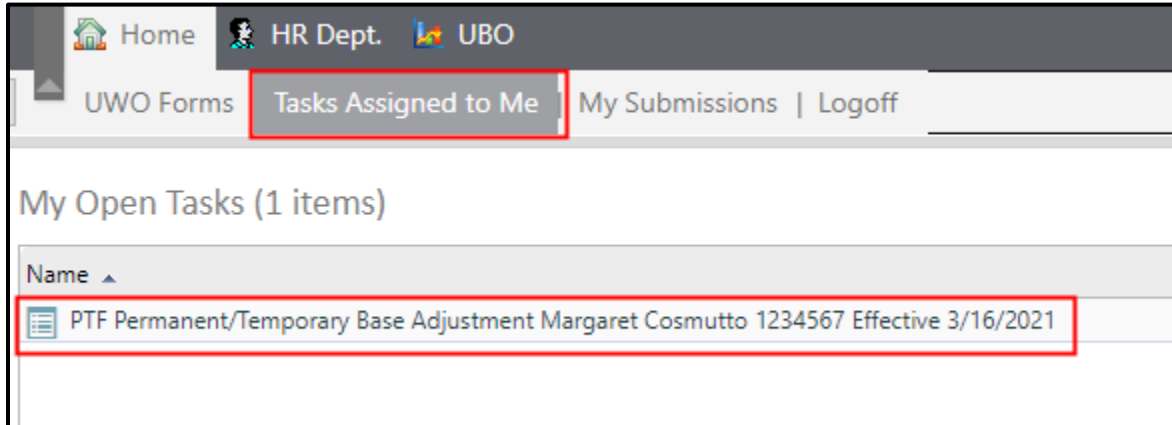
Review the information for accuracy and select from the actions near the bottom of the PTF.

- "Approved" – will send the form through to the next step in the process
- "More Info Needed" – requires a comment regarding the additional information needed, will be sent back to requestor to address and once fixed, will be resent back to you for review
- "Decline Request" – will end the PTF processing and terminate the request. This action requires a justification in the comments section. An email will be sent to the requestor indicating the transaction has been declined
- "Cancel Request" – can be used if you need to terminate a request if no longer needed
- "Cancel Form Changes" – can be used to cancel any changes that you made prior submitting