



Northeastern

PeopleAdmin


The Role of the Facilitator

End User Guide

Navigation in PeopleAdmin

Browser Note: PeopleAdmin has been tested on many browsers. You may experience slightly different behaviors between browsers and you can use the browser that you prefer.

Home Page Content

1. **Product Module** – Press this button to toggle between Position Management and Applicant Tracking. When you are in the Position Management Module, the header will be orange; and in the Applicant Tracking module, the header will be blue.
2. **Role Selector** – Use the drop down to change your role. Then press the Refresh button.  You will know that you have successfully changed roles when you see a green bar with a 'success' message. Click the x icon to close this green bar.
3. **Shortcuts** (Window content managed by HRM)
4. **My Links** (Window content managed by HRM)

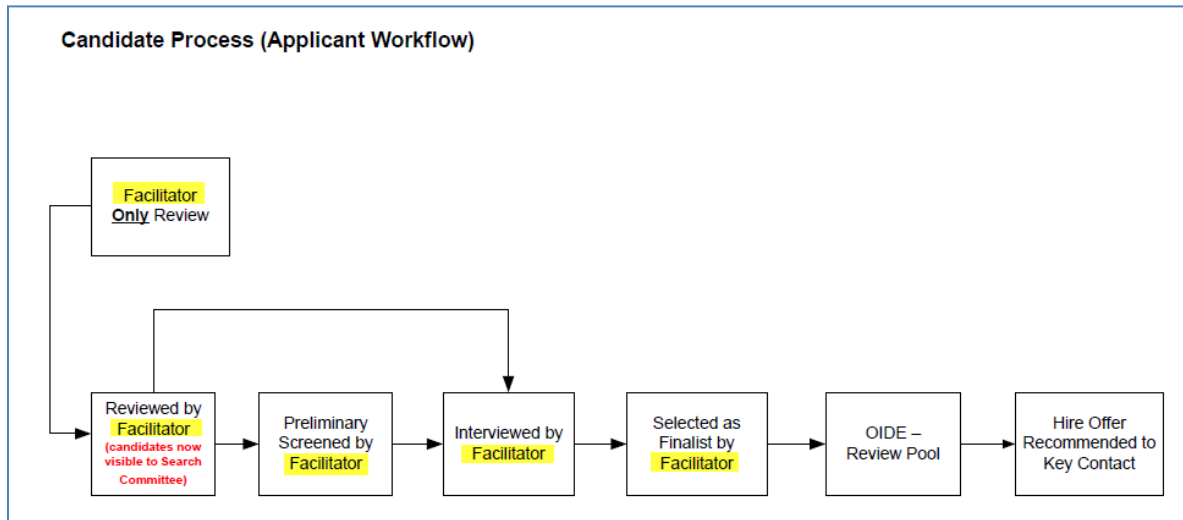
PeopleAdmin System Access

URL: <https://neu.peopleadmin.com/hr>

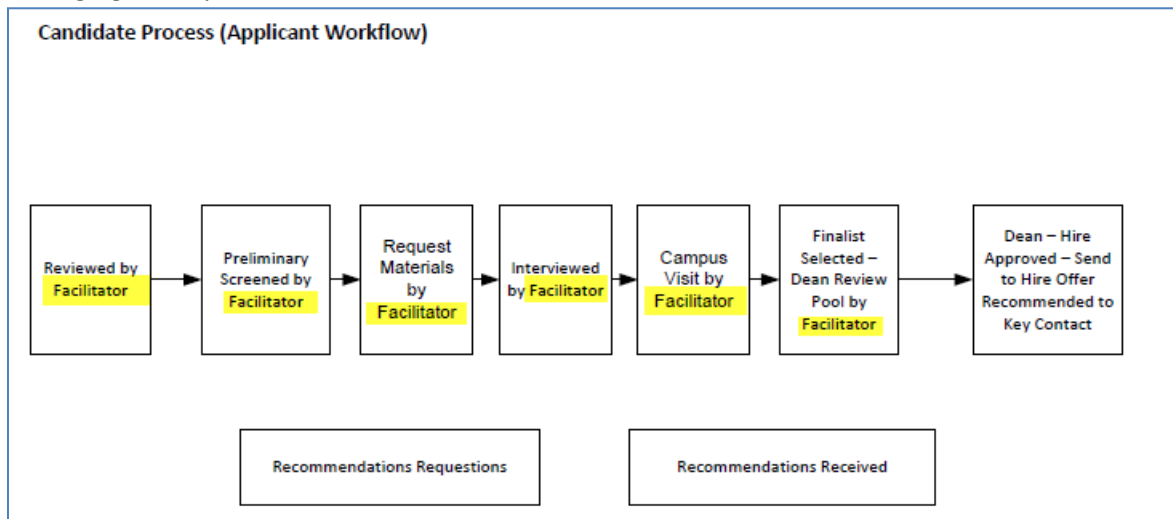
You will use your nunet username and password to access the system. This is the same username and password you would use to login to your computer each day.

The Facilitator will have a role in two specific Workflows:

1. Managing Staff Applicants



2. Managing Faculty Candidates



Managing Staff Applicants

Key Points:

- ✓ The 'Facilitator Only Review' workflow state will contain all applicants (internal and external) and will not be viewable by any Search Committee members until moved to 'Reviewed by Facilitator.'
- ✓ As a Key Contact, you are automatically a Facilitator even though you may not be specifically named as such on a Requisition.
- ✓ Applicant Dispositions: Below are the 3 options available to a Facilitator, who can use any combination of the 3 as they see appropriate.
 - a. A Facilitator can move staff applicants along various workflow states (Facilitator Only Review > Reviewed by Facilitator > Screened > Interviewed, etc.). In doing so, Search Committee members and others can view and rank applicants.
 - b. A Facilitator can Reject staff applicants instead of moving them along in the Workflow.
 - c. A Facilitator can retain a number of applicants in the Facilitator Only Review state instead of moving them along in the Workflow.

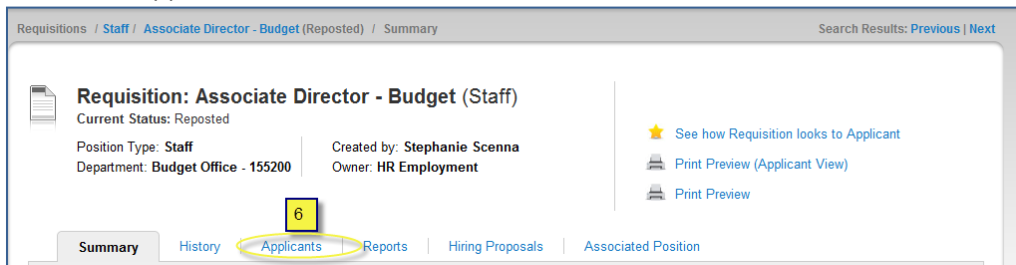
Steps to Manage Staff Applicants

1. Select the Applicant Tracking module
2. Change role to Facilitator
3. Go to Requisitions > Staff
4. Search for the Requisition
5. Click on Requisition Number or Posting Title

The screenshot displays the PeopleAdmin interface for managing staff requisitions. The top navigation bar includes 'Inbox', 'PeopleAdmin', 'Watch List', and 'APPLICANT TRACKING' (1). The user is logged in as 'Jill Smith' with the role of 'Facilitator' (2). The 'Requisitions' menu is open, showing 'Staff' (3), 'Full-Time Faculty', and 'Part-Time Faculty'. The 'Staff Requisitions' page features a search bar with 'budget' entered (4) and a 'Create New Requisition' button. Below the search bar, an 'Ad hoc Search' section shows 'All Staff Requisitions' and 'Ad hoc Search (8 Items Found)'. A table lists requisitions with columns for Requisition Number, Posting Title, Division/College (Posting), Requisition Facilitator, Workflow State, Active Applications, and Created Date. The second row is highlighted, showing requisition STFR000021 for the position 'Associate Director - Budget' (5).

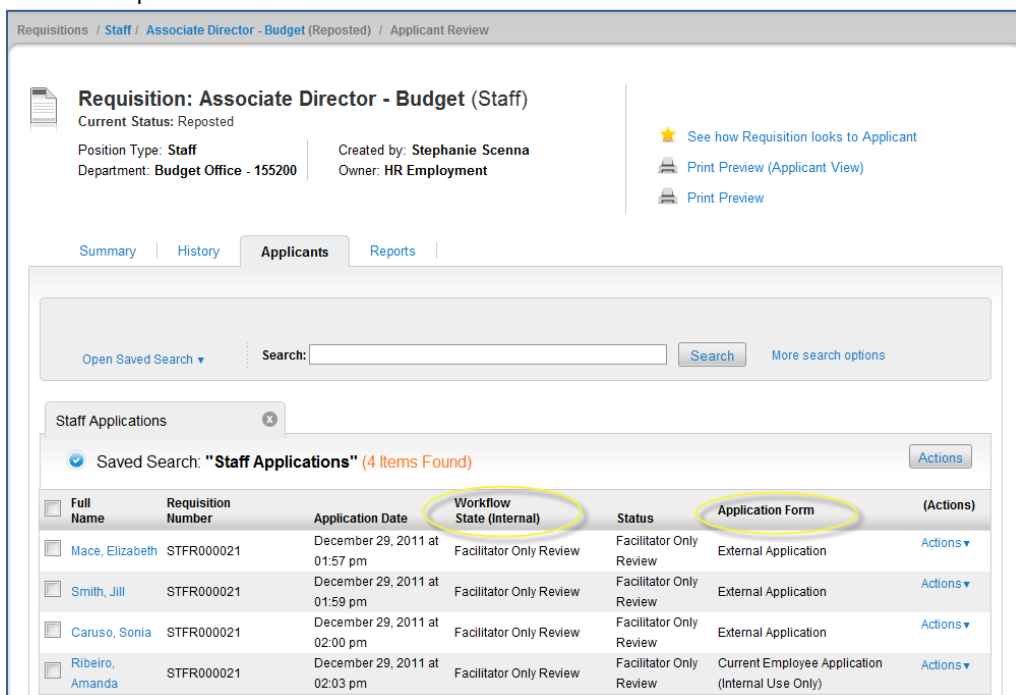
Requisition Number	Posting Title	Division/College (Posting)	Requisition Facilitator	Workflow State	Active Applications	Created Date	(Actions)
STFR000020	Senior Financial Analyst	Administration and Finance	Samuel Solomon, Jeffrey Wormuth	Approved - Internal	0	December 20, 2011 at 12:19 pm	Actions ▼
STFR000021	Associate Director - Budget	Administration and Finance	Samuel Solomon, Jeffrey Wormuth	Reposted	4	December 20, 2011 at 02:49 pm	Actions ▼

6. Go to the Applicants tab



7. **Reviewing Applicants:** On this page you have a number of options.

- A. Review one applicant at a time
- B. Review applicants 'in bulk'
- C. Review supplemental questions and answers
- D. Export search results



Search Results:

- Workflow State Column: As a reminder, at this state, applicants are only visible to the Facilitator, and not the Search Committee. Applicants will need to be moved to 'Reviewed by Facilitator' in order to be visible to the Search Committee. Any Internal candidates should be contacted regarding their candidacy.
- Application Form Column: Designates the External vs. Current Employee application type.

Note: For Office Support/Technical positions, the facilitator should only identify which applicants have been "Interviewed" and HR Employment will complete the process after meeting with the finalist.

A. To review one applicant at a time:

- Click on the applicant's name, or on the Actions button (in the applicant's row) and select View.

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions

At the **top** of the application, you can do the following things:

- Scroll through the application
- Take an action on this applicant
- Go back to the listing of applicants
- Go to the next applicant in the listing

Requisitions / ... / Associate Director - Budget (Posted) / Applicant Review / Tim Thomas Facilitator Only Review

Search Results: [Next](#)

Job application: Tim Thomas (Staff)

Current Status: Facilitator Only Review
Application form: External Application

Full name: Tim Thomas
Address: 10 Main Street, Arlington, MA
Username: tim123
Email: tim@zed.zed
Phone (Primary): (508) 555-4545
Phone (Secondary):
Position Type: Staff
Department: Budget Office - 155200

Created by: Tim Thomas
Owner: Facilitator

Take Action On Job Application

WORKFLOW ACTIONS

- Keep working on this Job application
- Candidate Reviewed (move to Reviewed by Facilitator)
- Reject Candidate (move to Rejected by Facilitator)

Summary | Recommendations (0 of 0) | History

At the **bottom** of the application are 3 links:

- Link to the PDF resume
- Link to download a PDF of the Application
- Link to download a PDF of the Application and the attached documents (ie., Resume)

Submitted on November 26, 2011

Required Documents

Document Type	Name	Conversion Status
Resume	Resume 11-26-11 19:22:13 (9.1 KB)	PDF complete

Optional Documents

No optional documents added.

PDF Documents

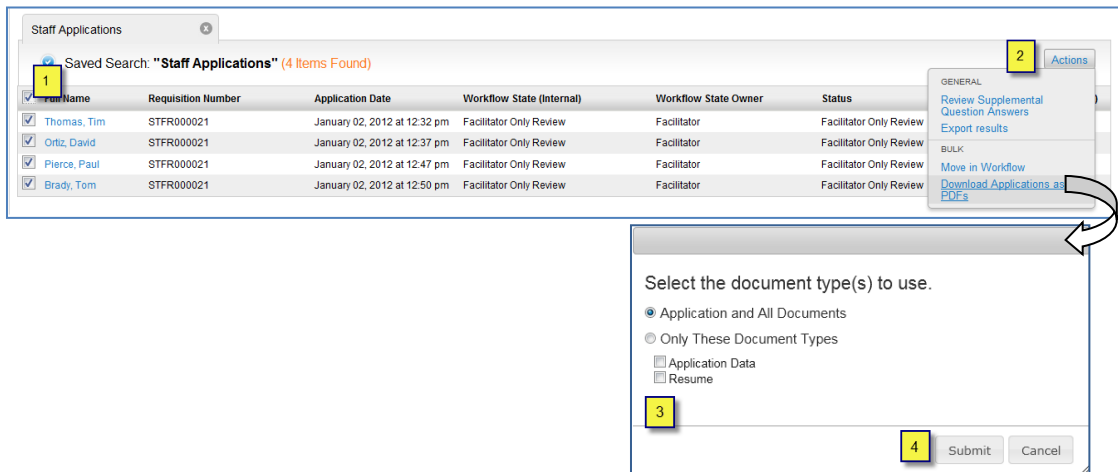
Document Type
Application
Application and attached documents

Recreate PDF
Recreate PDF

B. To Review applicants 'in bulk'

Return to your Applicants.

1. Select all applicants
2. Click on Actions > Download Applications as PDF's
3. Select the documents
4. Press Submit



C. To Review Supplemental Questions

Return to your Applicants.

1. Select all applicants
2. Click on Actions > Review Supplemental Questions

D. To Export Results (provides an excel spreadsheet of the applicants.)

Return to your Applicants.

1. Select all applicants
2. Click on Actions > Export Results.

8. **Take Action on Applicants:** On this page you have a number of options.

- A. Take action on one applicant (reject). Two methods.
- B. Take action on applicants 'in bulk'.

Requisitions / Staff / Associate Director - Budget (Posted) / Applicant Review

Requisition: Associate Director - Budget (Staff)
Current Status: Posted
Position Type: Staff
Department: Budget Office - 155200
Created by: Stephanie Scenna
Owner: HR Employment

See how Requisition looks to Applicant
Print Preview (Applicant View)
Print Preview

Summary | History | **Applicants** | Reports

Open Saved Search Search: More search options

Staff Applications 3

Saved Search: "Staff Applications" (4 Items Found) Actions

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions

A. Take Action on one applicant (Reject).

- 1. Click on the applicant's name or select the Actions link in the row of the applicant, select View Application
- 2. In the Applicant view, select Take Action On Job Application, select Reject Candidate.
- 3. Select a Reason and press Submit

Staff Applications 3

Saved Search: "Staff Applications" (4 Items Found) Actions

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review	Active	Actions

Requisitions / ... / Associate Director - Budget (Posted) / Applicant Review / David Ortiz Facilitator Only Review

Search Results: Previous | Next

Job application: David Ortiz (Staff)
Current Status: Facilitator Only Review
Application form: External Application

Full name: David Ortiz
Address: 12 Oak Street
Brookline, MA
Username: david123
Email: david@zed.zed
Phone (Primary): (617) 555-8989
Phone (Secondary):
Position Type: Staff
Department: Budget Office - 155200

Created by: David Ortiz
Owner: Facilitator

2 Take Action On Job Application

WORKFLOW ACTIONS

- Keep working on this Job application
- Candidate Reviewed (move to Reviewed by Facilitator)
- Reject Candidate (move to Rejected by Facilitator)

Take Action

Reject Candidate (move to Rejected by Facilitator)

Reason (please select)

Not Qualified
Not Qualified
Incomplete Application
Other

Submit Cancel

B. Take Action on all Applicants

1. Select all applicants
2. Select Actions > Move in Workflow
3. Select a Workflow state (Reviewed by Facilitator)
4. Press Save Changes

The screenshot displays the 'Staff Applications' interface. At the top, a search bar shows 'Saved Search: "Staff Applications" (4 Items Found)'. Below this is a table with columns: Full Name, Requisition Number, Application Date, Workflow State (Internal), Workflow State Owner, and Status. Four applicants are listed: Thomas, Tim; Ortiz, David; Pierce, Paul; and Brady, Tom, all with a 'Facilitator Only Review' status. A yellow box labeled '1' highlights the search bar. To the right, an 'Actions' menu is open, showing options like 'Review Supplemental Question Answers', 'Import Application Data', 'Export Applicants without Email', 'Export results', 'Move to Requisition', 'Move in Workflow' (highlighted with a yellow box labeled '2'), 'Email Applicants', and 'Download Applications as PDFs'. Below the table, a section titled 'Editing: Workflow States for 4 Applicants' shows a 'Change for all applicants' dropdown menu. The dropdown is open, showing a list of workflow states: 'Select a workflow state...', 'Reviewed by Facilitator' (highlighted with a yellow box labeled '3'), 'Rejected by Facilitator', 'Move to Draft', 'Move to Preliminary Screened by Facilitator', 'Move to Interviewed by Facilitator', 'Move to Selected as Finalist - OIDE Review Pool', 'Move to Hire Offer Recommended to Key Contact', 'Move to Hired', 'Move to System Det Does Not Meet Minimum Qualifications', and 'Move to Withdrawn'. At the bottom, a 'Save changes' button (highlighted with a yellow box labeled '4') and a 'Cancel' link are visible.

Full Name	Requisition Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status
Thomas, Tim	STFR000021	January 02, 2012 at 12:32 pm	Facilitator Only Review	Facilitator	Facilitator Only Review
Ortiz, David	STFR000021	January 02, 2012 at 12:37 pm	Facilitator Only Review	Facilitator	Facilitator Only Review
Pierce, Paul	STFR000021	January 02, 2012 at 12:47 pm	Facilitator Only Review	Facilitator	Facilitator Only Review
Brady, Tom	STFR000021	January 02, 2012 at 12:50 pm	Facilitator Only Review	Facilitator	Facilitator Only Review

Editing: Workflow States for 4 Applicants

Change for all applicants: Select a workflow state... (3)

Applicant	Current State	Reason
Tim Thomas	Facilitator Only Review	
David Ortiz	Facilitator Only Review	
Paul Pierce	Facilitator Only Review	
Tom Brady	Facilitator Only Review	

Save changes (4) or Cancel

A message will appear in the green bar at the top of the page, and the Status of the applicants will be updated.

Search Committee will now have the ability to view these applicants.

The Facilitator will now have the ability to select **two more Workflow steps** for Applicants:

- **Preliminary Screened** by Facilitator (optional)
- **Interviewed** by Facilitator (required)
 - Once Interviewed is selected, the Facilitator can select **Finalist** – and then the next step is for OIDE to review the pool. **The Facilitator will not be able to take any Actions on these applicants once it is in the status of 'Finalist Selected – OIDE Review Pool.'**

Managing Faculty Candidates

Please refer to the instructions for Staff Applicants. The tasks are the same, with the following exceptions:

- The Search Committee has immediate view to all candidates.
- The Facilitator will have the ability to select from multiple workflow states for Faculty Candidates.
- The Dean will select the workflow state of 'Hire Offer Recommended – to Key Contact' before the Hiring process can begin.
- The Key Contact will then have the ability to begin a Hiring Proposal.

Managing Part-Time Faculty Candidates

Please refer to the instructions for Staff Applicants. The tasks are the same with the following exceptions:

- The workflow is simplified
- The workflow does not include OIDE

