Northeastern University
Human Resources Management

PeopleAdmin User Guide for Faculty

Position Management | Requisitions | Postings | Applicant Tracking

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Position Management Module Overview

The Position Management module allows you to manage your positions and job descriptions. You will use this module when you need to hire an employee or manage position information for your existing employees.

To navigate to the Position Management module:

1. In the Product Module drop-down select **Position Management**.
2. In the Current Group drop-down select **Originator** or **Key Contact**.
3. There are several tabs across the top:
    a. **Home**: The Homepage lists your Inbox, Watch List, Shortcuts and Links.
    b. **Positions**: List of positions within your division. There are several options:
        - **Staff, Full-Time Faculty** and **Part-Time Faculty**. Allows you to view the associated Positions Library and create positions.
        - **Staff Actions, Full-Time Faculty Actions** and **Part-Time Faculty Actions**. List of transactions that have been created in your area.
    c. **Position Classes**: List of position classes for viewing purposes. Includes Staff, Full-Time Faculty and Part-Time Faculty. These are important for Banner and relate to positions.
    d. **My Profile**: Login preferences can be adjusted under “My Profile” and and a preferred default Group log in may be set as well.
    e. **Help:** PeopleAdmin help guides, not Northeastern specific.

Create a New Faculty Position

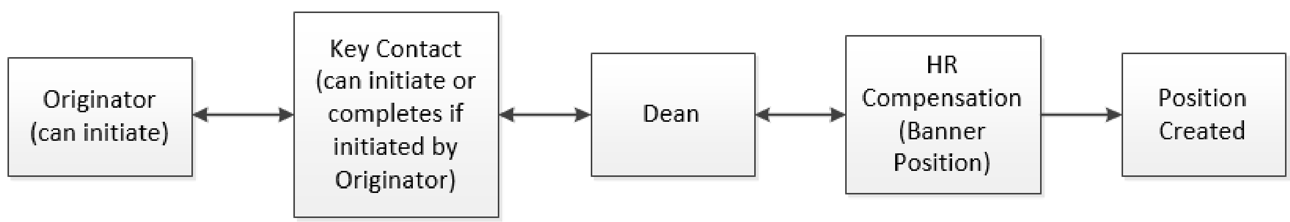
Workflow Overview:

A new position can be initiated by an Originator or a Key Contact. If a position is created by an Originator, the position will be sent to the Key Contact, and then the Key Contact will send it to HR Compensation (HRC). HRC will review and make any appropriate adjustments to the position attributes before finalizing the position action.

The Key Contact is the only user that can modify the position. If users in subsequent workflow steps would like a change, it must be sent back to the Key Contact.

The Key Contact will receive an email when HRC finalizes the position action. Relevant users will be notified throughout the workflow via email and the PeopleAdmin inbox.

Request/Create New Position – Full Time Faculty



Steps To Create a New Position

1. Select **Position Management** from the Product Module drop-down.
2. Select **Originator** or **Key Contact** from the Current Group drop-down.
3. Select **Full-Time Faculty** from the **Positions** tab to view the **Position Library**.
4. Click **Create New Position** in the upper right of screen.
5. Select **Create New Faculty Position** from the **Create New Faculty Position** pop up.

If cloning a position, skip to step 8.

6. Complete all fields:
    a. **Position Title**: Free form field limited to 30 characters for Banner HR only, abbreviate if necessary. The requisition for posting section will allow the title to be edited for posting.
    b. **Executive Level**: (defaults based on system settings)
    c. **Division**: (defaults based on system settings)
    d. **Department**: Select the Department where this position will reside. **Note:**
        i. Only departments for which you have access will display.
        ii. This field does not determine the funding for the position, only where it resides; funding information for this position will be designated the later in the process.
7. Click **Start Action**; **skip to step 9.**
8. To clone an existing position, leave all fields blank and select a position from the **Position Library**. Click the circle to the left of the position and click **Start Action**.
    a. Only position descriptions for which you have access to within your own division will display.

    b. All attributes associated with the cloned position will carry over to the new position.

9. **Action Form**: Complete the fields in a linear fashion, required fields have an asterisk (*). Click **Save** at any time to save changes to return to at a later time. Change will automatically save after clicking **Next**.
    a. *New position*: Complete each section of the form in a linear fashion, then click **Next**.
    b. *Cloned position*: Edit fields as necessary, then click **Next**.
10. **Action Summary**: Review all entries and edit as needed before submission. Click the **Edit** link in any section to make changes. **Errors must be fixed before submitting for approval**.
    a. **Current Status**: Current stage in the workflow.
    b. **Owner**: The owner at current stage in the workflow.
    c. **History tab**: Display the history of changes, comments and workflow steps.
    d. **Settings tab**: View the position's Org Security fields and make any edits if necessary.
11. Click **Take Action on Action** when ready to move forward and enter relevant comments. Comments will remain with the position and be viewable to all. Available options vary depending on the Current Group.
    a. **Cancel Action**: Signals Disapproval, the position will not be able to be re-activated later.
    b. **Send to Key Contact**: Only viewable by Originator. Send to Key Contact so that Key Contact can send it to HRC for review.
    c. **Send to HR Compensation**: Send the position to HRC for review and final Banner stage.

12. **Return to Originator**: Move the action back in the workflow. Only use this option if the Originator needs to make edits to the position attributes.

13. Create a requisition once notification of approval is received.

Modify an Existing Position

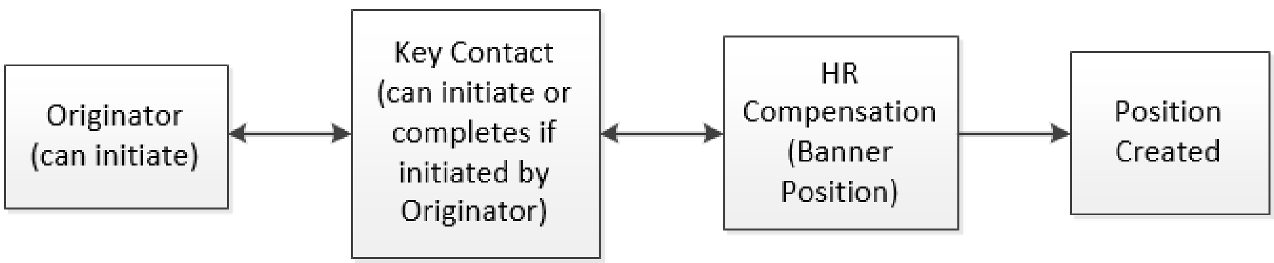
Workflow Overview:

A position can be modified by an Originator or a Key Contact. If a position modification is initiated by an Originator, the position will go to the Key Contact, and then the Key Contact will send it to HR Compensation (HRC). HRC will review and make any appropriate adjustments to the attributes of the position before finalizing the position action.

If the position needs to be edited after this step, it must send it back to the Key Contact. The users in the subsequent workflow steps cannot edit the position.

The Key Contact will receive an email when HRC finalizes the position action. Relevant users will be notified throughout the workflow via email and in the PeopleAdmin inbox.

Modify Existing Position – Full Time Faculty



Steps To Modify an Existing Position

1. Select **Position Management** from the Product Module drop-down.
2. Select **Originator** or **Key Contact** from the Current Group drop-down.
3. Select **Full-Time Faculty** from the **Positions** tab to view the **Position Library**.
4. Select the position to be modified by clicking the **position number**.
5. Select an **Action** from the list on the upper right side of the screen.
6. A prompt to confirm start will display, click **Start** to view the position form.
7. **Information Regarding Request:** Briefly explain intentions for modifying position. Use this section to input information such as additional responsibilities, new or different skills, expected outcomes, etc. All approval groups will be able to view the comments. Click **Save**.
8. Complete the fields in a linear fashion, required fields have an asterisk (*). Click **Save** when editing is complete.
9. Review the **Action Summary** section.
10. Click the **Take Action on Action** button and select **Send to HR Final Stage Banner**. Add comments as necessary and click **Submit**.
11. The page will refresh and a bar with the 'success' message will appear at the top of the screen.
12. The **Status** and **Owner** fields will display **HR Compensation**. No further editing can be completed at this time.
13. Once approved, create a requisition.

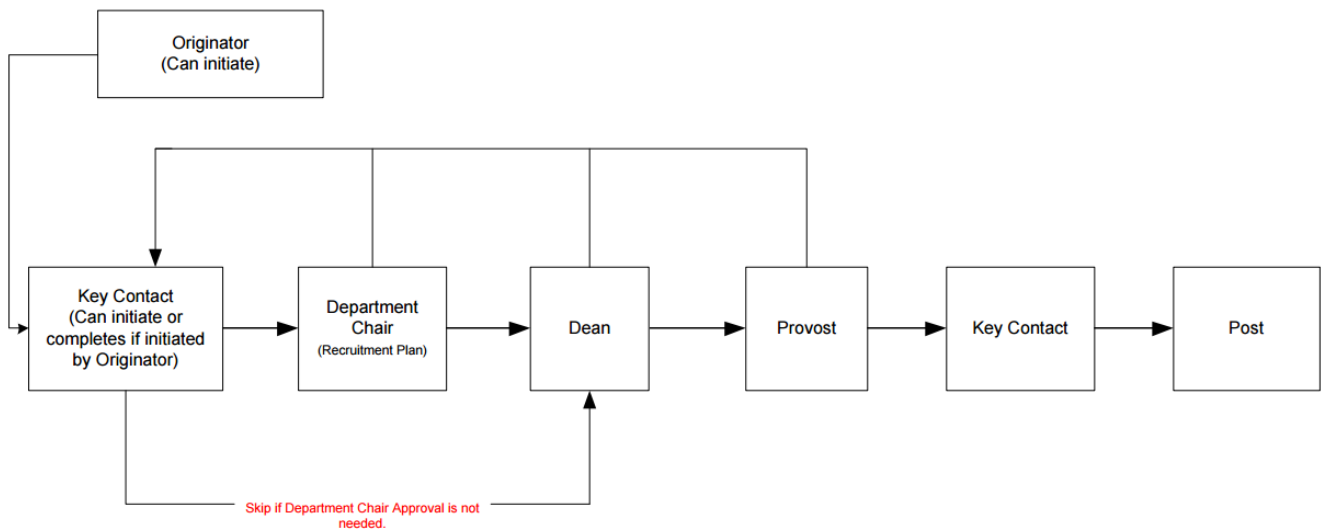
Create a Faculty Requisition

Workflow Overview:

Following approval to either replace or create a new position, a requisition must be created. A requisition will create the job posting through which candidates may apply.

In some cases, a requisition may be created before a position. This is common practice with Full Time Faculty searches in which the finalist will determine the position (title, rank, etc.).

Create a Requisition – FT Faculty



Steps to Create a Faculty Requisition

1. Select **Applicant Tracking** from the Product Module drop down.
2. Select **Originator** or **Key Contact** from the Current Group drop-down.
3. From the homepage either:
    a. Click the **Create New Full-Time Faculty Requisition** link under the **Shortcuts** section on the right side of screen.
    b. From the Requisition tab, select **Full-Time Faculty** and click **Create New Requisition**.
4. Three options will display but most users should select the third option: **Create from Position**.
    - Create from Position Type: Select if position has not yet been determined.
    - Create from Requisition: used for cloning existing requisitions in your area, *please call HRM before using.*
    - **Create from Position**: this is recommended for most requisitions as most of the position information is pulled over.

If the requisition is not being tied to a position, select Create from Position Type. Skip steps 5 through 7 and proceed to step 8 to complete the New Requisition form.

Only one open requisition can be tied to a single position at one time. If the requisition is going to be used hire more than one person, at the time of hire, the default position number must be changed to another approved position.

5. Select **Create from Position**, to view the **Positions Library**.
6. Select the position and click on the **Action** drop-down in the far right column.
7. Select **Create From** to connect the position to the requisition. If the **Create From** option does not appear, select **View** from the **Action** drop-down to review outstanding actions that need to be completed before the position can be used to create a requisition.
8. Complete the fields on the **New Requisition** form, then click **Create New Requisition** at the top or bottom of the page. Required fields have an asterisk (*).
    a. **Posting Details**: Complete the fields in the form. Required fields have an asterisk (*).
    b. **Guest User**: If applicable, create guest user account(s). Click **Next** to move forward.
    c. **Supporting Documents**: If applicable, upload supporting documents. Click **Next** to move forward.
    d. **Applicant Documents**: All options default to **Not Used**, select the documents for applicants to provide.
    e. **Posting Specific Applicant Questions**: If using knockout questions, provide question and answer choices for applicants to complete.
    f. **Search Committee**: If utilizing a search committee, input information for each committee member.
    g. **Ranking Criteria**: If utilizing ranking criteria, input information.
    h. **Requested References**: Input criteria for references.
9. **Summary Page**: Review the information, and click **Edit** to make additional edits if needed.
    a. Preview the applicant view of the requisition by clicking "**See how the requisition looks to an Applicant"** on the upper right of the page.
    b. Tabs on the Summary page:
        i. History – Displays all historical transactions and comments on the requisition as it moves through the workflow.
        ii. Settings – View the Organization fields (HR View)
        iii. Hiring Proposals – View all Hiring Proposals.
        iv. Associated Position – Detailed position information.
        v. Reports – Provides a series of reports including statistics on the applicant pool for EEO review.
10. Click **Take Action on Requisition** when ready to move forward. Available options vary depending on the Current Group.
    a. **Keep working on this Requisition:** Saves the form and allows for further edits before taking action. Comments may be entered at this point, they will stay associated with the requisition and be viewable to all.
    b. **Return to Originator:** Moves the action backward in the workflow. The option should only be utilized if the originator needs to make changes to the position. (Originators will not see this option)
    c. **Cancel Posting (move to Canceled):** This equals Disapproval and the position will not be able to be re-activated later.

    d. **Send to Department Chair:** This moves the action forward in the workflow.
    e. **Send to the Dean:** This moves the action forward in the workflow. **In some cases it is possible to skip the Department Chair if applicable.

11. Select **Department Chair** to move the requisition forward in the workflow. Comments may be entered at this point, they will stay associated with the requisition and be viewable to all.
12. The page will refresh and a bar with the 'success' message will appear at the top of the screen. If this bar is red, an error message will display, typically indicative of a missed required field. Edit the form to resolve the errors and re-submit.
13. The **Status** and **Owner** fields will update to **Department Chair** and the requisition will not be able to be further edited.

Post a Faculty Position

Workflow Overview:

The Provost can move a Requisition forward to the Key Contact as an Approval to Post. The Key Contact will receive an email when the Provost moves it to Approval to Post. The requisition will be in the state of "Key Contact to Post."

Steps to Review/Edit/Approve a Staff Posting

1. Select **Applicant Tracking** from the Product Module drop-down.
2. Select **Key Contact** from the Current Group drop-down.
3. Click on the **Job Title** from the inbox on the homepage.
4. The Summary page will display. Tabs on the page:
    a. History – Displays all historical transactions and comments on the requisition as it moves through the workflow.
    b. Settings – View the Organization fields (HR View).
    c. Applicants – The profiles of applicants apply to the position will appear here.
    d. Reports – Provides a series of reports including statistics on the applicant pool for EEO review.
    e. Hiring Proposals – All Hiring Proposals will appear here.
    f. Associated Position – Detailed position information will appear here if applicable.
5. **Review** the requisition, to confirm accuracy. Click **Edit** to make changes if necessary. (If the job title requires editing, do so at this point.) Review edits on the **Summary** page again if changes are made.
6. Click **Take Action on Requisition** when accuracy is confirmed.
    a. **Keep working on this Action:** Saves the form and allows further edits before taking action.
    b. **Approve for Later Posting:** Requisition will automatically post on the date specified.
    c. **Approve for Internal Only:** Requires a posting waiver. Posting will not appear on the Northeatsern website.
    d. **Post**: Requisition will post requisition immediately.
    e. **Cancel Posting (move to Canceled):** Posting will be cancelled and the position will not be able to be re-activated later.
7. Select **Post** to move the requisition forward in the workflow**.** Comments may be entered at this point, they will stay associated with the requisition and be viewable to all.
8. The page will refresh and a bar with the 'success' message will appear at the top of the screen. If this bar is red, an error message will display, typically indicative of a missed required field. Edit the form to resolve the errors and re-submit.
9. The **Status** will update to Posted and the **Owner** field will update to **Key Contact**.
10. The Key Contact will be able to take the following Actions:
    a. **Keep working on this Action:** Saves the form and allows further edits before taking action.
    b. **Close Posting: R**emove the posting.
    c. **Reposted:** If a change is made to the requisition, it will need to be re-post it to reflect the changes.
    d. **Extended Posting**: Use to extend beyond the Close Date, or if additional changes are made after using the Reposted option.
    e. **Cancel Posting:** Posting will be cancelled and the position will not be able to be re-activated

later.

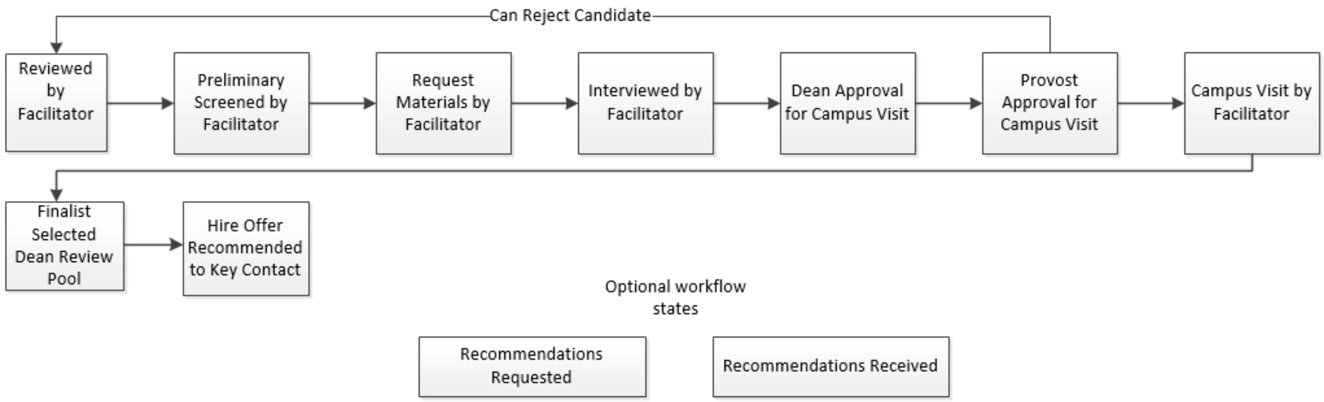
f. **Fill Posting**: Remove from the web; mark the position as filled.

Manage Faculty Applicant Pool

Workflow Overview:

- Applicants are automatically put into the “Reviewed by Facilitator” state. Key Contact can view applicants in the system, but only a Facilitator can move the candidate forward through the workflow. Contact HR Employment to be added to a requisition if it is already posted.
- A Key Contact may also be a member of a Search Committee.
- Key Contact must designate a facilitator (manage the applicant pool on the requisition) and Committee Member(s) (view applicant pool only).
- Applicant Dispositions: Only a Facilitator can take action on the applicant, also known as a disposition. Below are the 3 options available:
    - **Move the applicant along various workflow states** (Reviewed by Facilitator > Screened > Interviewed, etc.).
    - **Reject faculty applicants** instead of moving them along in the Workflow. Once rejected, they are no longer active in the applicant pool. HRM can move applicants out of the rejected state if necessary.
    - **Keep an applicant in the Review by Facilitator state** for later consideration.

Tenure Track - Candidate Process (Applicant Workflow) – Full Time Faculty



Steps to Manage Faculty Applicants

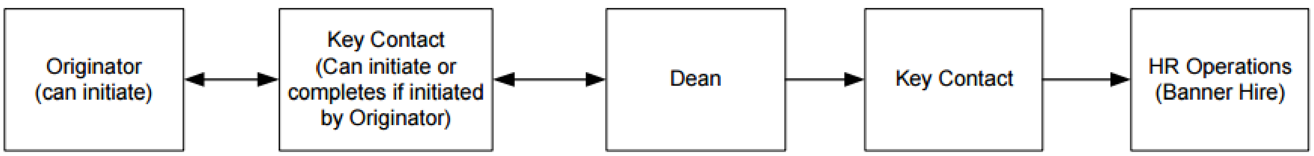
1. Select **Applicant Tracking** from the Product Module drop-down.
2. Select **Facilitator** from the Current Group drop-down.
3. Select **Full-Time Faculty** from the **Requisitions** tab and**.**
4. Click the requisition number or title to view the **Summary** page.
5. Click the **Applicants** tab to view a list of applicants.
    a. **Workflow State**: Applicants are automatically put into the "Reviewed by Facilitator" state, and are visible to the Facilitator and the Search Committee.
    b. **Active/Inactive**: If disqualification questions were used on the requisition and an applicant was disqualified based on responses, they will not display on this 'Active Applicant' list. Inactive candidates can be viewed by clicking the **More search options** link and selecting **Inactive**.
6. **Reviewing Applicants:** There are four options for reviewing applicants.
    a. Review one applicant at a time
    b. Review applicants 'in bulk'
    c. Review supplemental questions and answers
    d. Export search results
7. **Take Action on Applicants:** There are two options:
    a. Take action on one applicant
    b. Take action on applicants in bulk (only available if all in the same Workflow State)
8. Facilitator has the ability to select **two additional Workflow steps** for Applicants:
    a. **Preliminary Screened** by Facilitator (optional).
    b. **Interviewed** by Facilitator (required).

Initiating a Full-Time Tenure Track Hiring Commitment and Hiring Proposal

Workflow Overview:

This process can begin when the Dean has approved the pool, and has forwarded the finalist to the Key Contact in the state "Hire offer recommended to Key Contact". It will need to also be approved by the Provost.

Create Full-Time Non-Tenure Track Faculty Hiring Proposal



Steps to Initiate a Faculty Tenure Track Hire

1. Select **Applicant Tracking** from the Product Module drop-down.
2. Select **Key Contact** from the Current Group drop-down**.**
3. Select **Full-Time Faculty** from the **Requisitions** tab**.**
4. Click the requisition number or title to view the **Summary** page.
5. Click on the **Applicants** tab and click on the name of the applicant in the Workflow State of "Hire Offer Recommended".
6. Click **Start Tenure Track Hiring Proposal**.
7. A positions listing will display with the position to which the requisition was originally attached selected by default. Review position information by clicking on the position number. The position selected in this step will be attached to the applicant's new hire record in Banner.
    a. In some cases another position number is required. In this case, search for the position number and select the radio button next to the position number to select another position for this Hiring Proposal.
8. After selecting the position, **scroll to the bottom of the page** and click **Select Position**.
9. Complete the **Hiring Proposal Form.** Click **Next** to move through each section of the proposal or click **Save** to return to it at a later time. Require field have an asterisk (*).
10. When ready to begin the Hiring Commitment click the **Take Action** drop-down and select **Department Chair – Hiring Commitment (move to Department Chair – Hiring Commitment)**.

Hiring Part-Time Faculty

Position Management: Refer to the FT Faculty Position Management steps. These positions tend to be pooled, you don't need to follow the one-to-one rule that FT hires follow.

Requisitions: Refer to the FT Faculty Requisition steps. The form for PT is similar to the Staff requisition form in that it is simplified. The workflow is also much shorter than FT Faculty.

Managing Applicant Pool: Refer back to the FT Faculty steps. Facilitator is soley responsile for identifying a finalist.

Hiring Proposal: Refer back to the non-tenure track steps for FT Faculty. The Dean will approval this form.