Northeastern University Human Resources Management

PeopleAdmin User Guide for Staff

Position Management | Requisitions | Postings | Applicant Tracking



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Introduction to this guide

This guide covers the general process of hiring staff in PeopleAdmin, but does not cover the business processes of individual colleges and departments. It is the responsibility of the individual colleges and departments to develop supplemental materials for their specific business processes and procedures and to communicate them as necessary.

Browser Note: PeopleAdmin works best on Google Chrome, or Firefox. You can use Internet Explorer or Safari, but you may experience slightly different behaviors between browsers.

Glossary of Terms

Module Type: PeopleAdmin has two modules to work in:

- Position Management: Allows you to manage your positions and job descriptions.
- Applicant Tracking: Allows you to manage your requisitions, applicants and hiring proposals.

Role: PeopleAdmin is structured to allow users to perform certain actions and have access to certain information based on the user's role. Most users default to the Employee role upon login. Pick the appropriate role for the action you are performing. You will only be able to select the role(s) that have been tied to your User Profile.

There are different roles in PeopleAdmin that allow you to perform different functions. Every user can access the system as the following roles: Employee, Search Committee or Facilitator. There are additional roles that you may have based on your job duties, for example: Key Contact.

For each lesson, always check that your role is correct. With the exception of managing your application pool, most lessons in this guide are for the role of originator or key contact.

Most Common Role Descriptions:

- Division Approver: Typically assigned to a department head who will be responsible for approving
 positions and hires. You may be assigned a Department level approver role or an Executive level
 approver role.
- Department Chair: Responsible for approving recruitment plans for Tenured and Tenure Track Faculty searches
- **Employee**: Serves as the Default Role; currently this role contains no functionality.
- Facilitator: You may be selected (by a Key Contact) to serve as a Facilitator for a particular requisition.
 In this role you control the applicant workflow states.
- Key Contact: This role can create and modify positions and can also approve actions initiated by an
 Originator for a division. This includes positions, requisitions, and hiring proposals.
- Originator: This role can initiate the creation or modify positions. All forms created by this person must be approved by the Key Contact.
- Search Committee: You may be selected (by a Key Contact) to serve on a Search Committee for a
 particular requisition. In this role you can view applicants, submit rankings, and add comments to
 applicant records.

Requesting Access and Where to Get Help

To request access, email HRIS@neu.edu.

For help with the system, data inquires, reports, etc., please see the chart below:



Logging In

The link to PeopleAdmin is neu.peopleadin.com/hr. Use your MyNeu credentials to login.

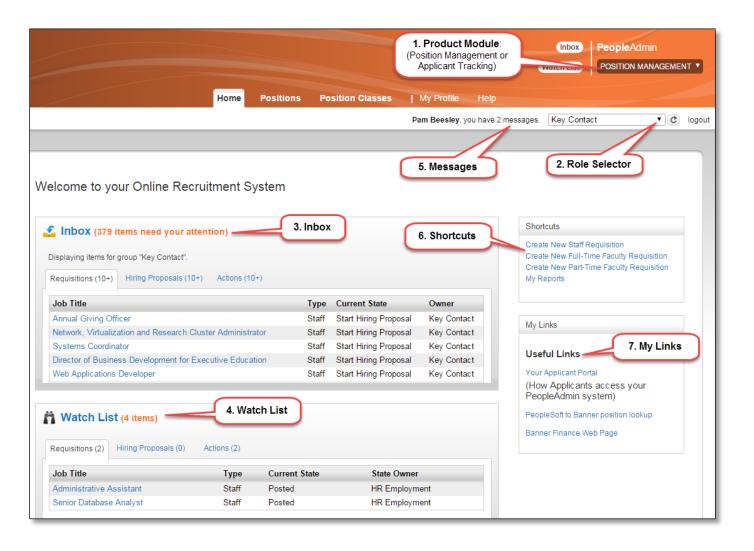
Training Guide Key

Reminder!	Important items to remember
*	Helpful hints to assist you during the process
0	Do not edit or click on the information

Home Page Navigation

It is important to familiarize yourself with the homepage of PeopleAdmin and there are several shortcuts available to you.

- 1. **Product Module**: Click the drop-down 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. The system will default to Applicant Tracking when you initially log in.
- 2. **Role Selector**: Use the drop down to change your role and then click the **Refresh** button. You will have successfully changed roles when you see a green bar with a 'success' message across the top of the page. Click the **x** icon to close this green bar.
- 3. **Inbox**: Contains items that need your attention/action as part of a workflow.
 - Items in your inbox require an action on your part; often the action will require your approval.
 - Your Inbox is organized in tabs: Requisitions, Hiring Proposals and Actions.
 - You can easily access the specific item directly via your inbox, review it, and select the next step in the workflow; without navigating elsewhere in PeopleAdmin to locate your action items.
 - You will also receive an email in your regular Northeastern Outlook email program to alert you that something new is in your PeopleAdmin Inbox
- 4. **Watch List**: Stores positions, requisitions and hiring action items that you choose to 'watch'. For example, when you create a requisition and send it to the next step in the workflow, you can choose to include the requisition in your Watch List. This way you can monitor the subsequent approvals and actions on that requisition.
- 5. Messages: Only used if you run reports in PeopleAdmin.
- 6. Shortcuts: Commonly used links to different areas of PeopleAdmin.
 - These links vary by role and by product module.
 - Familiarize yourself with this area as it's the quickest way to jump around in PeopleAdmin.
- 7. **My Links**: Commonly used external links. These links are helpful when trying to access common websites such as the HRM applicant portal.



Lesson 1: 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 Role 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 (highlighted in yellow below): Allows you
 to view the associated Positions Library and create positions.
 - Staff Actions, Full-Time Faculty Actions and Part-Time Faculty Actions (highlighted in purple below): List of transactions that have been created in your area.



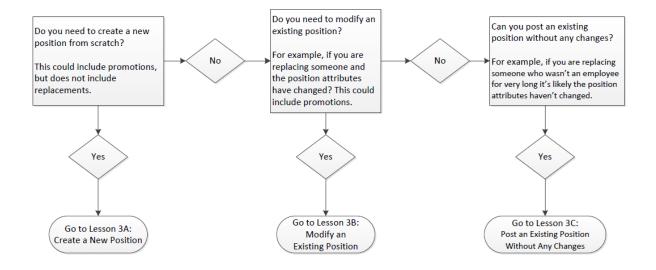
- c. **Position Classes**: List of position classes for viewing purposes. Includes Staff, Full-Time Faculty and Part-Time Faculty. These are important for Banner and relate to positions.
- d. **My Profile**: You can adjust your login preferences under "My Profile" and set your preferred default role.
- e. Help: PeopleAdmin help guides, not Northeastern Specific.

Lesson 2: Staff Position Overview

When you need to fill a vacancy or manage a current employee's position, you will need to create or modify a position in PeopleAdmin. There is an online form that captures position specific information and job description information. While the steps will vary for how you can create or modify a position, all actions will require some level of approval. See each lesson for a detailed approval workflow.

In most cases each employee is assigned to a unique position in PeopleAdmin so the ratio of positions to employees is 1:1.

When you are ready to fill a vacancy, if you are unsure how to begin, use the decision tree below to guide you:

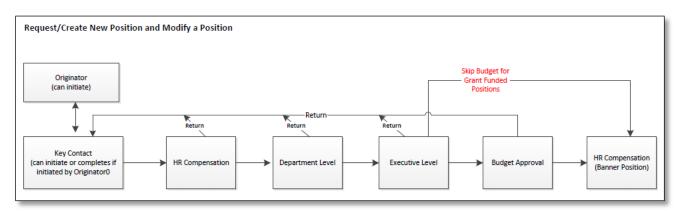


Lesson 3A: Create a New Staff Position

A new position can be initiated by an Originator or a Key Contact. If you create a position in the role of an Originator, the position will go to the Key Contact next, 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 forwarding it to the next step in the workflow.

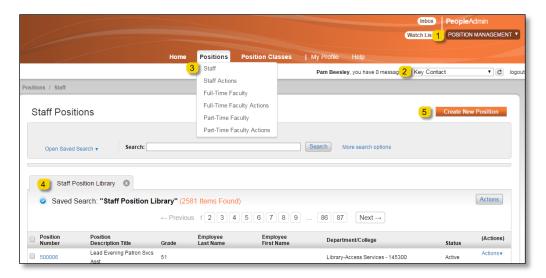
If the position needs to be edited after this step, it <u>must</u> send it back to the Key Contact. The users in the subsequent workflow steps cannot edit the position.

The Key Contact will receive an email when HRC sends it to the next step in the workflow. Each user in the workflow steps will receive an email when the action has been forwarded to them and it will also be in their PA inbox on the homepage.



Steps To Create a New Position

- 1. In the Product Module drop-down select **Position Management**.
- 2. In the Role drop-down select **Originator** or **Key Contact**.
- 3. Click the **Positions** tab and select **Staff**.
- 4. The **Position Library** will display.
- 5. Click the **Create New Position** button in the upper right hand corner.



- 6. A pop up box will display with two choices; each choice determines which form you will use:
 - a. Create New Staff Position: Combined form for A/P, OST, Crafts, and Service positions
 - b. Create New Research Position: Form for Research Scientists family and Post-Doctoral positions

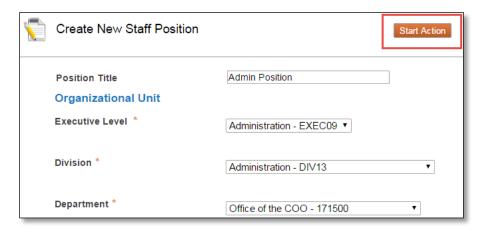


NOTE: In this guide, we will use Staff Positions in all examples. If you need to create a Research position select the Research Position option here. As you go through the guide, some of the Research fields will be slightly different than the Staff fields, but overall, the process is the same.

7. Select Create New Staff Position.

If you are creating a new position, proceed to step 8. If you are cloning a position, skip to step 10.

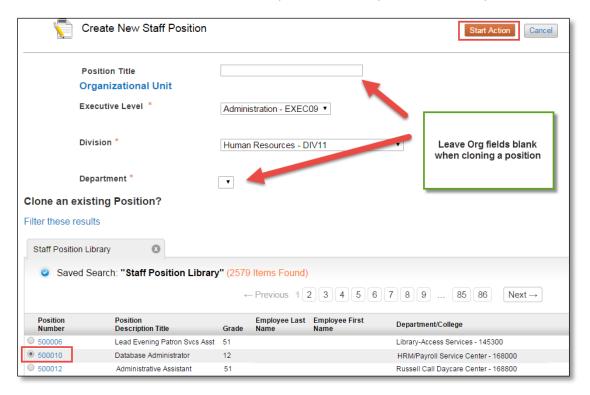
- 8. Complete the following fields:
 - a. **Position Title**: Free form field limited to 30 characters, abbreviate if necessary.
 - You will have an opportunity to write more characters in this field on the requisition for posting purposes; the 30 character limit is for the position and Banner HR only.
 - b. **Executive Level**: (defaults based on your system settings)
 - c. **Division**: (defaults based on your system settings)
 - d. **Department**: Select the Department where this position will reside. **Note:**
 - i. You will only see departments that you have access to.
 - ii. This field <u>does not</u> determine the funding for the position, only where it resides; you will designate the funding information for this position later on in the process.
- 9. Click **Start Action** to continue; **skip to step 11.**



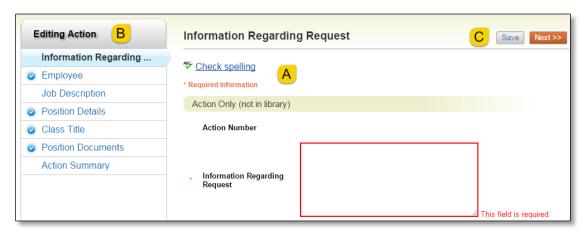
10. To clone an existing position, leave all of the fields blank and select a position from the library. Click the circle to the left of the position and click **Start Action**.



- a. You will only have access to position descriptions within your own division.
- b. All attributes associated with the cloned position will carry over to the new position.



- 11. Action Form: Whether you created a new position or cloned one, you are now on the Action Form.
 - a. If you created a new position you will want to move through the form in a linear fashion. Complete the necessary fields in each section and then Click **Next**.
 - b. If you cloned a position and know which fields you need to edit, you can jump to each section by clicking on the section titles on the left side.
 - c. At any time, you can save the position by clicking the **Save** button. When you click **Next** at the end of each section, the position will automatically save.



Follow the table below to complete the fields on the Staff Position form. Required fields have an asterisk (*). Click **Next** at the end of each section.

Information Regarding Request Section	
*Information Regarding Request	Briefly explain your intentions to create a position. You can also use this section to put information such as additional responsibilities, new or different skills, expected outcomes, etc. All approval groups will be able to see the comments.
HR Comp Representative	Select from the drop-down list.
HR Compensation comments	For Compensation use.
*Funding Type	Select from the drop-down list.
Reallocated from a discontinued position?	Select Yes or No.
Discontinued Position Number	Complete if the answer to question above is Yes.
Discontinued Position Title	Provide title of discontinued position.
Non-salary source	Provide information if position is reallocated from a non-salary source.
Minimum Salary	Provide the minimum amount expected to pay.
Maximum Salary	Provide the maximum amount expected to pay.
Employee Section	
Employee Information	This information will be blank until the position is filled and the employee is seated in the position.
Job Description Section: If you clo edit if necessary.	ned the position, all of this information will already be displayed;
General Information	,
*Position Title	Completed previously.
Grade	Select the appropriate grade level. May leave blank if not known.
*Position Summary	Overview of the job's responsibilities. This will carry over to the requisition for posting.
*Qualifications	Minimum qualifications required for the position. This will carry over to the requisition for posting.
Key Responsibilities & Accountage button to add responsibilities.	abilities: Click the Add Key Responsibilities & Accountabilities Entry
Responsibility & % of time	Add one job responsibility and the percent of time that is spent on that responsibility.
	Continue to add key responsibilities and accountabilities by clicking the Add button until all entries total 100%.
Financial Measures	
Annual Operating Budget that the job manages	Enter a dollar amount here and any supporting details.

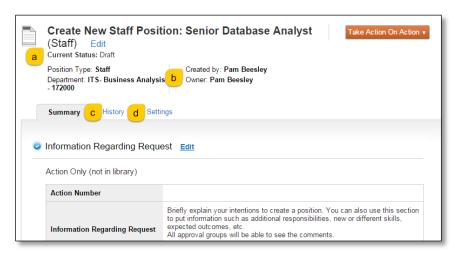
Supervision	
Number of direct reports and types of employees	Number of direct reports and types of employees (i.e. Admin Professionals, OST, Students, etc.).
Position Details	
Position Information Section	
Position number	The position number gets assigned when Compensation finalizes the position action.
Reports to	Enter the <u>position number</u> of the individual that this position will report to. If you do not know the number, provide the name.
Job code	Enter the 6 digit code if known.
Census code	Enter the 3 digit code if known.
Fiscal Year	Select the fiscal year in which you will start using this position.
Position Type	Select Single or Pooled . Choose Pooled if the position is meant to have more than one employee hired into it.
Position Funding: Click the Add	Position Funding Information Entry button.
Index	Enter the Index number. If you don't know the Index number, click the Index Lookup link.
Account	Select the appropriate account.
Percent	Enter the percent that will be charged to the above Index.
	If it is a split funded position, you will need to make additional entries and ensure the total equals 100%.
Class Title: Click the radio button r	ext to the appropriate Class Title.
•	oad up to three supporting documents. Examples include a Job Click Save if you upload any documents.

12. **Action Summary**: Review all the entries you have made and edit the information before submission if necessary. Click the **Edit** link in any section to make changes.



You must fix any errors before submitting for approval.

- 13. Note the following features of the **Action Summary** page:
 - a. **Current Status**: The stage in the workflow. This changes along the steps in the workflow.
 - b. **Owner**: The owner at the stage in the workflow. This changes along the steps in the workflow.
 - c. **History tab**: View the history of changes and workflow steps.
 - d. **Settings tab**: View the position's Org Security fields and make any edits if necessary.



14. Once you are sure all of the information is correct, click the **Take Action on Action** button: This action will move the position action to the next step in the workflow. You will see different options depending on your role:

Role View	Description of Role Specific Options in the Workflow
Originator	Keep working on this Action : This saves the form and allows you to go back in later and continue working on it before taking action.
	Cancel Action: This equals 'Disapproval' and the position will not be able to be re-activated later.
	Send to Key Contact : This sends the position to the Key Contact who will then send it to HR Comp for review. The Originator's process stops here.
Key Contact	Keep working on this Action : This saves the form and allows you to go back in later and continue working on it before taking action.
	Cancel Action: This equals 'Disapproval' and the position will not be able to be re-activated later.
	Send to HR Comp for Review: This sends the position to HR Comp for Review.
	Return to Originator : This moves the action back in the workflow. Only select this option if the Originator needs to make edit to the position attributes.

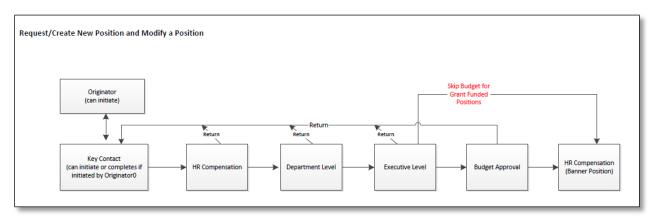
- 15. At the end of each action, you will be prompted to enter comments. The comments will:
 - Appear on the history tab of the position
 - Allow you to communicate with the next approver, previous user comments will display in the notification email to the next approver.
 - The comments live with the position action and are viewable to everyone
- 16. Once the position is approved, you can create a requisition. Go to lesson 4.

Lesson 3B: Modify an Existing Position

A position can be modified by an Originator or a Key Contact. If you initiate a position modification in the role of an Originator, the position will go to the Key Contact next, 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 forwarding it to the next step in the Workflow.

If the position needs to be edited after this step, it <u>must</u> 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 sends it to the next step in the workflow. Each user in the workflow steps will receive an email when the action has been forwarded to them and it will also be in their PA inbox on the homepage.

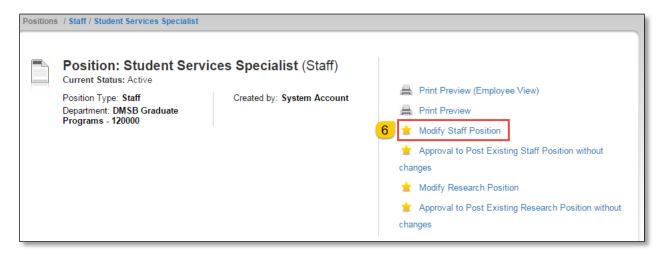


Steps To Modify an Existing Position

- 1. In the Product Module drop-down select **Position Management**.
- 2. In the Role drop-down select **Originator** or **Key Contact**.
- 3. Click the **Positions** tab and select **Staff**.
- 4. The **Position Library** will display.
- 5. Select the position that you wish to modify by clicking the **position number**.



6. Select an **Action** from the list on the right side of the screen. In this example, click **Modify a Staff Position.** If you are modifying a Research position, choose **Modify Research Position.**



7. You will be asked if you are sure, click **Start**. The position form will display.

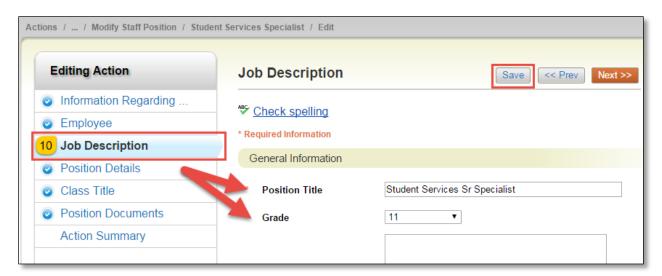


8. Before you can make any edits, you must provide a reason for the change and include any information regarding the request. There are 4 **Types of Changes**:

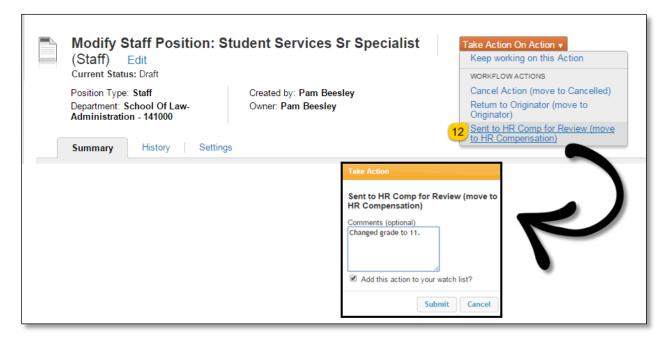
Reason	When Used
Job Description Update	There is an update to a job description that resides in the job library or a description needs to be added for an existing position.
Reclassification	There is a request to have a change to title and/or grade to an existing position with a seated employee. This may or may not result in a salary change.
Position Information Update	There are changes to position details, index information, employee class, hours, position class code, etc.
Incumbent Replacement	A vacant position that needs to be approved for posting that has changes to the job description and/or the position information.

9. **Information Regarding Request:** Briefly explain your intentions to create a position. You can also use this section to put information such as additional responsibilities, new or different skills, expected outcomes, etc. All approval groups will be able to see the comments. Click **Save**.

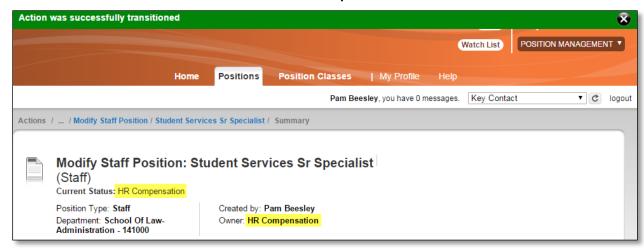
10. Now you can view and edit any of the position attributes by clicking through the sections on the left. For example, if you need to edit the grade and position title, click the Job Description Section and edit the fields. Once you are done editing, click **Save**.



- 11. Click the **Action Summary** section on the left side.
- 12. Click the **Take Action on Action** button and select **Sent to HR Comp for Review**. Add comments if necessary and click **Submit**.



- 14. The **Status** and **Owner** fields will now show **HR Compensation**. You cannot edit the Position Action.



15. Once the position is approved, you can create a requisition. Go to lesson 4.

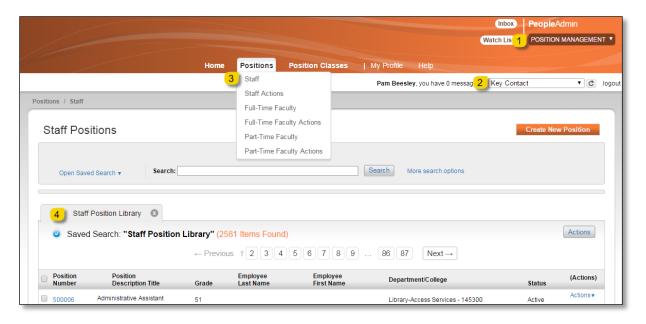
Lesson 3C: Post an Existing Position Without Any Changes

If you have a position that does not require any changes related to the job description or position specific details, you can send it for department approval and bypass HR Compensation and Budget approval. **This is a read only form. This should only be used when you are certain that there are no changes.**

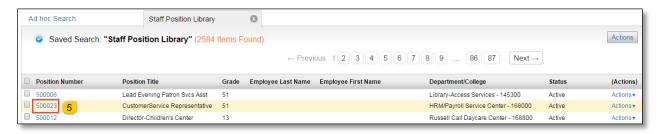
For example, if you are replacing someone who wasn't an employee for very long it's likely the position attributes haven't changed.

Steps To Post an Existing Position Without Any Changes

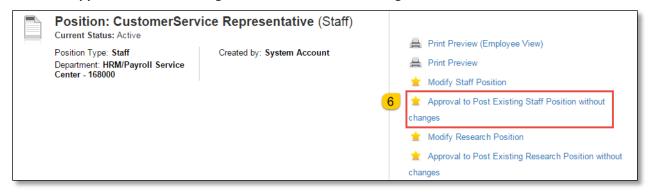
- 1. In the Product Module drop-down select Position Management.
- 2. In the Role drop-down select **Originator** or **Key Contact**.
- 3. Click the Positions tab and select Staff.
- 4. The Position Library will display.



5. Open the position that you want to modify by clicking the position number.



6. Select Approval to Post Existing Staff Position Without Changes.



7. You will be asked if you are sure, click **Start**.



8. The position form will display and you can view the position attributes by clicking through the sections on the left.

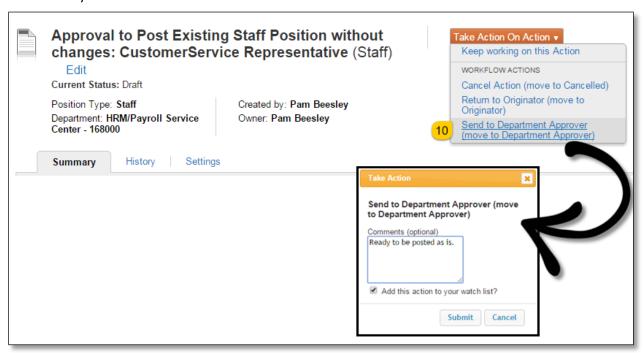


The position will be locked from any other updates during this time.

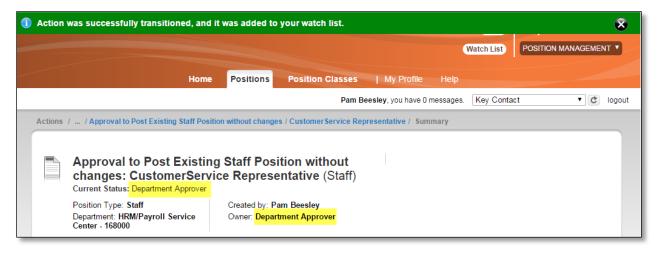
9. Click the **Action Summary** link.



10. Click the **Take Action on Action** button and select **Send to Department Approver**. Add comments if necessary and click **Submit**.

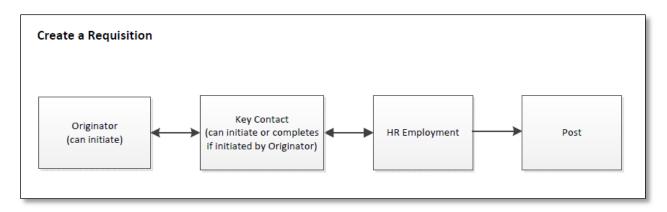


- 11. The page will refresh and a green bar with the 'success' message appears next (click the **x** icon **≥** to close).
- 12. The **Status** and **Owner** fields will now show **Department Approver**. You cannot edit the Position Action.



13. Once the position is approved, you can create a requisition. Go to lesson 4.

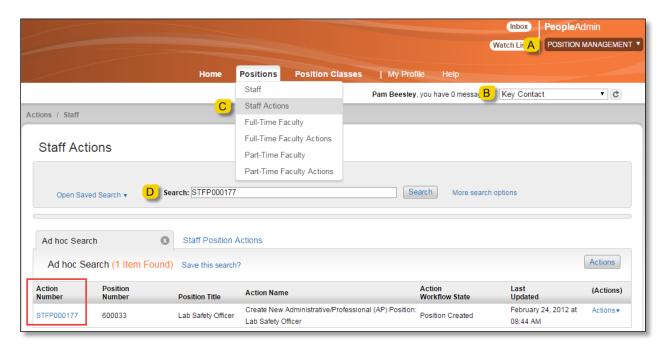
Lesson 4: Create a Staff Requisition



Create Staff Requisitions

Now that you received approval to either replace or create a new position, you will need to create a requisition. A requisition will become the job positing that candidates apply to. Before you create a requisition, you will need to obtain the Action Number from the approved position. You can find the Action Number in two places:

- 1. If you received an email from compensation, it will be in the email.
- 2. You can look it up in PeopleAdmin:
 - a. In the Product Module drop-down select Position Management.
 - b. In the Role drop-down select **Originator** or **Key Contact**.
 - c. Click the Positions tab and select Staff Actions.
 - d. Type the position number in the Search field. The Action Number is under the Staff Position Actions in the far left column.



If you selected the **Watch Your Action** option when creating the position, the position will be in your **Watch List**. Open the position and scroll to the Action Only section to find the action number.

You are now ready to create a new requisition.

Steps to Create a Staff Requisition

- 1. Switch to the **Applicant Tracking** module.
- 2. Change your role to **Originator** or a **Key Contact** if necessary.
- 3. From the homepage either:
 - a. Click the Create New Staff Requisition link under the Shortcuts section on the right-hand side.



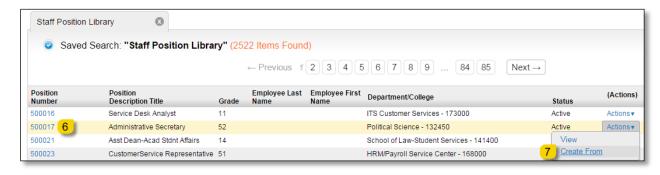
b. From the Requisition tab, select **Staff** and click the **Create New Requisition** button.



- 4. Three options will display but most users select the last option: **Create from Position**.
 - Create from Position Type: do not use; for HRM Administrator use only.
 - 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.
- 5. After selecting **Create from Position**, a listing of positions will appear on the next page. This is your Positions Library.

You can have only one open requisition tied to a single position at one time. If you plan on using a requisition to hire more than one person, you will need to open a single requisition, and then at the time of hire, you would change the default position number to another approved position.

- 6. Find your position and click the **Action** drop-down to the right of it.
- 7. Select **Create From** to connect the position to the requisition. If you don't see the **Create From** option, use the **View** option to see the outstanding actions that need to be completed <u>before</u> you can use this position to create a requisition.



8. The **New Requisition** form will display. Complete the fields in the form by following the instructions in the table below. Required fields have an asterisk (*):

New Requisition Form	
Field	Field Description
*Position Title	Defaults from the position, you can change the Title here.
Organizational Unit Section	
*Executive Level	Defaults from the position.
*Division	Defaults from the position.
*Department	Defaults from the position.
Applicant Workflow Section	
Workflow State	Defaults to Facilitator Only Review : the Facilitator is the ONLY person who can currently see any applicants (internal or external) that have applied. The Facilitator <u>MUST</u> move the applicant(s) to the State of Reviewed by Facilitator in order for Search Committee members to see applicants.
References Section	
References fields	ODO NOT USE for Staff Requisitions. This is ONLY used for Faculty.
Online Applications Section	
Accept Online Applications?	Defaults as checked, which indicates that you will accept online applicants through PeopleAdmin. You may uncheck this box if you intend to fill this requisition with an applicant sourced from another method such as a Search Firm. By unchecking this box, applicants will see this posting but will not be able to apply online.
Special Offline Application Instructions	If you uncheck the above box, please enter instructions for applicants on how to apply, e.g., "Thank you for your interest. Please call John Smith at the Recruitment Firm, 800-555-1212, to receive instructions on how to apply".

- 9. Click the **Create New Requisition** button at the top or bottom of the page.
- 10. **Posting Details**: Complete the fields in the form by following the instructions in the table below. Required fields have an asterisk (*):

Posting Details Form	
Field	Field Description
Posting Detail Informati	ion section
*Position Action Number	Enter Action number. (Go to step 1 of this lesson to retrieve Action number.)
*Position Title	This is the Title that will appear to applicants in the posting. Defaults from the position; you can change it here. (Changing it here will only impact the Posting, not the position)
*Division/College (Posting)	Will display on the Posting.
*Interdisciplinary Division/College	Will display on the Posting.
*Full/Part Time	Defaults from position, cannot edit.
*Benefits Eligible	Defaults from position, cannot edit.
*Grade	Defaults from position, cannot edit.
*Hours per Day	Defaults from position, cannot edit.
*Hours per week	Multiply the value in Hours per Day by 5 and enter the total in this field.
*Location	Where the job will be located. Select from the drop-down choices.
Requisition Number	Auto-assigned value.
Special Offline Application Instructions	The text will default to what you entered on the first screen and will be visible to applicants on the posting. This field is used only in the cases where another source will be used to receive applications or to communicate other instructions to applicants regarding external search firms. If this field is blank and you intend on accepting online applicants, please do not enter any information or instructions in this field.
*Position Summary	Defaults from position.
*Qualifications	Defaults from position.
Additional Information	Enter any additional information for applicants.
*Posting Date	Enter a date when you would like the posting to appear to applicants online. If you enter today's date, it will automatically be posted online as soon as it is approved.
Close Date	Enter a date here if the posting needs to close on a particular date and be removed from the web site. Unless you have a Waiver, (see Posting Waiver Type field below) postings must stay open a minimum of 30 calendar days.
Open until Filled	Check this box if you left the Close Date field blank.

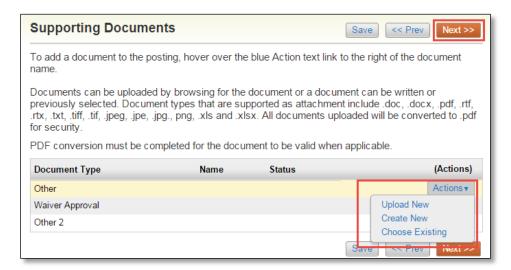
Posting Waiver Type	Select from the drop-down list. If you select the No Waiver option, the requisition will be posted.
Pass Message	O Do not edit this message. The default text will appear to applicants once their application is submitted.
Fail Message	O Do not edit this message. The default text will appear to applicants if you choose to use Posting Specific Questions on this requisition.
Quick Link	This is a direct link to the posting. It can be used to send to an applicant when you have a full waiver or to send to a friend.
Min Expected Salary	Defaults from the position and will <u>not be visible</u> to applicants on the Posting.
Max Expected Salary	Defaults from the position and will <u>not be visible</u> to applicants on the Posting.
Criminal Backgroun	d Check (CBC) Information section
Criminal Background Check Required?	Check if your job meets any of the criteria listed above.
Request CBC consultation with HRM	Check if you are unsure and would like someone from HRM reach out to you for clarification.
JobElephant Posting	g Information section
Send to JobElephant?	Defaults as not checked. Check this box if you want JobElephant to automatically post this Req on the following web sites: HERC.org, NEHERC.org, INSIDEHIGHERED.com, HIGHEREDJOBS.com, DiverseEducation.com, Veterensinhighered.com, Disabledinhighered.com and web.detma.org/jobquest
Notes for JobElephant	Indicate additional information and/or list additional web sites/publications/newsletters to which JobElephant should post.
Contact Information for JobElephant?	Enter the name, phone # and email address of the person with whom JobElephant should be in contact, in regards to this posting.
Inside Higher Ed Category	Select a category from the drop-down values. If you leave these fields blank, JobElephant will select them for you.
HERC Category	Select a category from the drop-down values. If you leave these fields blank, JobElephant will select them for you.
Additional Requisiti	on Information section
*Requisition Facilitator	Select the individual(s) within your division who will be managing the Applicant Pool (i.e. moving an applicant(s) to different states). If you want to select someone outside your division, please contact HR Employment.
	As a Key Contact, if you need to review applicants in the system or managing the applicant pool, you must add yourself as a "facilitator" at this step.
*Hiring Manager	Enter the name of the person to whom this position would report. This is <u>not visible</u> to

11. **Guest User**: Click the **Create Guest User Account** to grant users (e.g. a search firm) view-only access to this requisition. They will not be able to leave comments in the system or rank applicants.

The username and password are system generated; just enter the email address(es) and click the **Update Guest User Recipient List** button. Once you are finished or if you don't have any guest users, click **Next**.

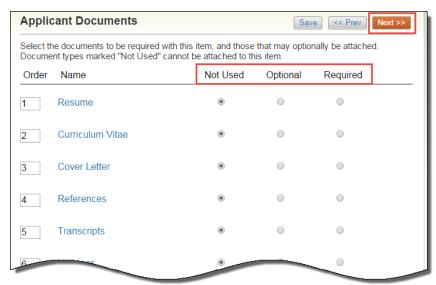


- 12. **Supporting Documents**: You may attach documents to this Posting that are not visible to Applicants. You can:
 - a. **Upload New**: browse to locate a file on your computer and upload.
 - b. **Create New**: use the online content tool to create a document to be included with this requisition.
 - c. **Choose Existing**: if you have documents previously uploaded into this site, you can choose them here.



13. When you are finished adding supporting documents or if you don't have any documents, click Next.

- 14. **Applicant Documents**: List of documents that can be included in the application process. There are three options to choose from, but all options default to **Not Used**.
 - a. **Optional**: optional document that an applicant can choose to provide.
 - b. **Required**: documents that the applicant must provide in order to submit an application.
 - c. **Not Used**: documents that will not be part of your application.

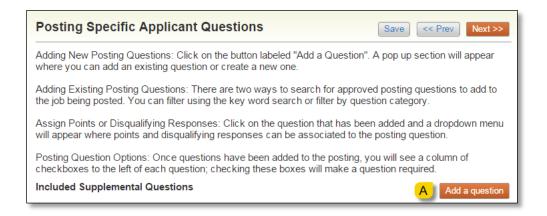


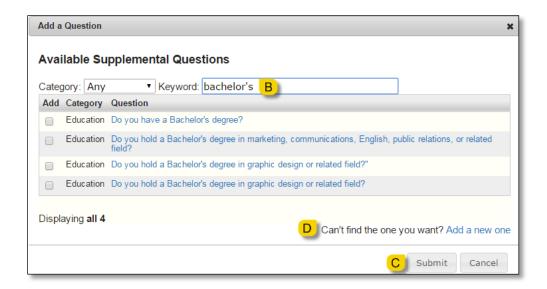
15. When you are finished with your selections, click **Next**.

16. **Posting Specific Applicant Questions**: You can set up questions and answer choices that applicants will answer during the application process. Answers can have ratings associated with them which may help in evaluating an applicant pool. These are known as "knock out" questions.

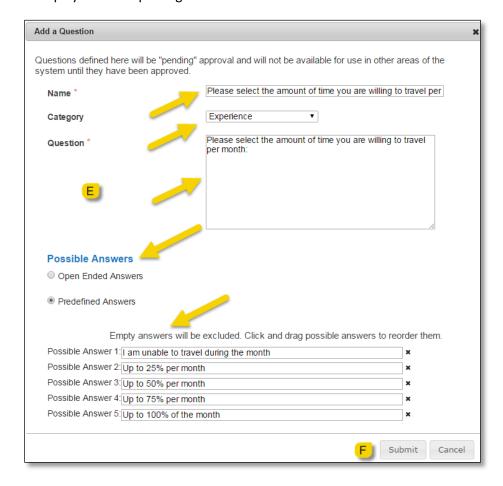
This feature allows you to narrow down your applicant pool using criteria to select the most qualified candidates. Please consider using this feature on all of your requisitions.

- a. Click the Add a Question button.
- b. A list of available questions will appear in a new window. Search by keyword and select a question. If you click the question, the list of possible answers will display.
- c. Once you've selected a question(s), click **Submit**.
- d. If you would like to write a new question, click the Add a new one link.

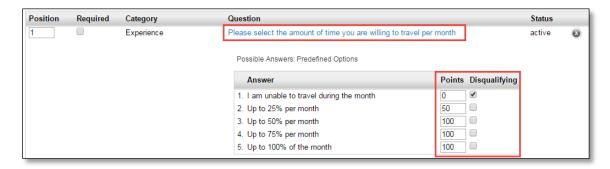




- e. If you are creating a new question, complete the required fields and click **Submit**.
- f. Your question has been added but has a status of pending. This new question will be automatically routed to Human Resources and upon their approval; this question will be displayed on the posting.



- 17. Once your question(s) is added, you have the option to assign points to possible answers.
- 18. Click the **question name** and assign points to each answer.
- 19. If an answer would automatically disqualify an applicant, check the box under the **Disqualifying** column. On Step 10 of this section, you can activate a field which allows you to display a 'Fail' message to the applicant in the event that this answer is chosen.

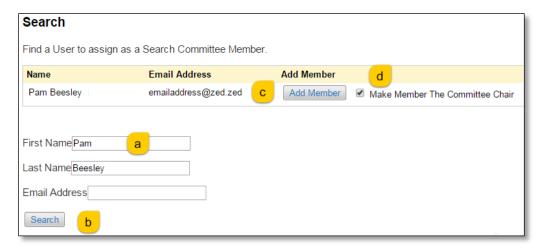


20. When you are finished with the questions, click **Next**.

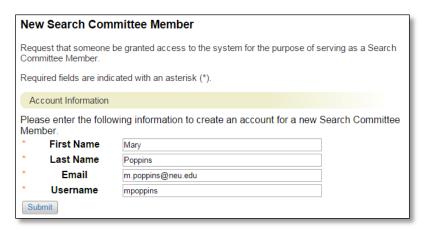
- 22. **Search Committee**: You may select Northeastern staff members to serve on a Search Committee. These individuals will be able to rank applicants based on Ranking Criteria that you will establish in the next section.
- 23. Under the **Search** section, search for a Northeastern employee:
 - a. Enter the name or email address.
 - b. Click Search.
 - c. Click the **Add Member** button from the list of search results.
 - d. To make a person the **Search Committee Chair**, check the **Make Member the Committee Chair** box.

This person will be able to view <u>all</u> of the comments from the Search Committee. Other Search Committee members can only view their own comments.

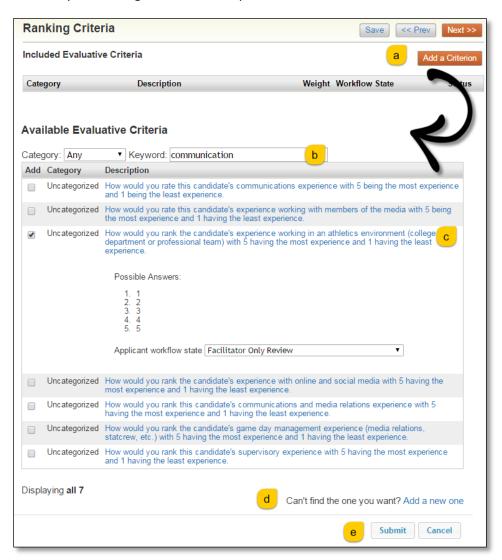
If you cannot find a Northeastern employee in the Search function and you would like them to be able to view and rank applicants, contact HRM to grant them access.



New Search Committee Member: If you would like invite someone outside of Northeastern to be able to view and rank applicants, enter the name, email (you can leave Username blank), click **Submit** and then click **Next.**



- 24. **Ranking Criteria**: In this section, you may set up evaluative questions to assist you and the Search Committee with the selection decision.
 - a. Click the Add a Criterion button.
 - b. Search by **Keyword** or select a question from the list.
 - c. Click on the question to see the possible answers and select the **Applicant workflow state**. This is the point during the workflow where the Search Committee members will be able to enter their comments / answers.
 - d. You can also add a new question by clicking the **Add a new one** link. This new question will be automatically routed to Human Resources and upon their approval, this question will be available.
 - e. Once your ranking criteria are complete, click Submit and then click Next.



- 25. Summary Page: Review the information and if you need to make edits, click Edit.
- 26. You can also see the applicant's view of the posting by clicking the link **See how the requisition looks to an Applicant** on the right side of the page.

- 27. Tabs on the Summary 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. Hiring Proposals View all Hiring Proposals.
 - d. Associated Position Detailed position information.
 - e. Reports Provides a series of reports including statistics on the applicant pool for EEO review.



- 28. Click the **Take Action on Requisition** button. You will see different options depending on your role:
 - a. Keep working on this Action: This saves the form and allows you to go back in later and continue working on it before taking action. **You can also enter comments that will appear on the history tab of the position. The comments allow you to communicate with the next approver, previous user comments will display in the notification email to the next approver.
 Note: The comments live with the position and are viewable to everyone.
 - b. Send to HR Employment (move to HR Employment).
 - c. **Return to Originator:** This moves the action 'backward' in the workflow. Only select this option if the originator needs to make changes to the position. (If you are in the originator role, you will not see this option).
 - d. **Canceled Posting (move to Canceled):** This equals 'Disapproval' and the position will not be able to be re-activated later.
- 29. To move the requisition forward in the workflow, select **Send to HR Employment**.
- 30. You will be prompted to enter comments and add the requisition to your Watch List. The comments will appear in the transition email to HR Employment (comments do not get stored in the Position Library):
- 31. The page will refresh and a green bar with the 'success' message appears next (click the **x** icon close). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- 32. The **Status** and **Owner** fields will now show **HR Employment**. You cannot edit the Position Action.



Lesson 5: Review, Edit and Approve Staff Posting

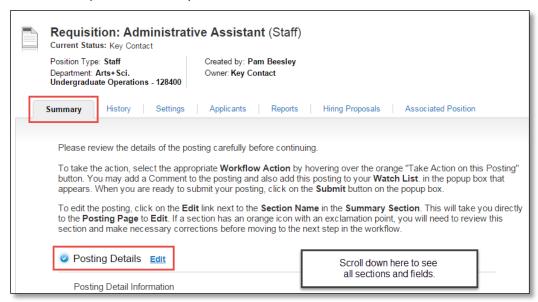
When an Originator has created a posting, it will move to the Key Contact for review and approval next. When a Key Contact has created a posting, it will move to HR Employment for review and approval next.

Steps to Review/Edit/Approve a Staff Posting

- 1. In the Product Module drop-down select Applicant Tracking.
- 2. In the Role drop-down select **Key Contact**.
- 3. From the homepage, go to the Inbox and click on the requisition title.



- 4. The Summary page will display:
- 5. 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 who have applied to the position
 - d. Reports Provides a series of reports including statistics on the applicant pool for EEO review.
 - e. Hiring Proposals View all Hiring Proposals.
 - f. Associated Position Detailed position information.
- 6. To review the requisition, scroll the length of this summary page. You will see all sections and fields of the form here.
- 7. To edit the requisition, click any of the **Edit** links.



This is a good time to check the requisition title as you can type more characters. You'll want to edit this title as it's what the applicant will see on the job posting.

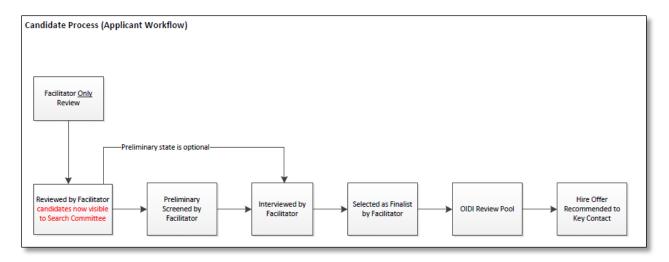
- 8. Type any changes in the field(s) as necessary. Click **Save**.
- 9. You can navigate to other fields in the requisition by using the left hand menu items or by clicking the **Next** button on each page. To finalize your edits, go to the **Summary** page.
- 10. Click the **Take Action on Requisition** button. You will see different options depending on your role:
 - **a. Keep working on this Action:** This saves the form and allows you to go back in later and continue working on it before taking action.
 - b. Send to HR Employment (move to HR Employment): For posting.
 - c. **Return to Originator:** This moves the action 'backward' in the workflow. Only select this option if the originator needs to make changes to the position. (If you are in the originator role, you will not see this option).
 - d. **Canceled Posting (move to Canceled):** This equals 'Disapproval' and the position will not be able to be re-activated later.
- 11. To move the requisition forward in the workflow, select **Send to HR Employment**
- 12. You will be prompted to enter comments and add the requisition to your Watch List. The comments will appear in the transition email to HR Employment (comments do not get stored in the Position Library):
- 13. The page will refresh and a green bar with the 'success' message appears next (click the x icon lose). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.
- 14. The Status and Owner fields will now show HR Employment. You cannot edit the Position Action.



If you need to make any edits to the requisition after this step, contact HR Employment.

You can keep tabs on your requisition by looking at your **Watch List** or looking at the workflow state on the requisition.

Lesson 6: Manage Staff Applicant Pool

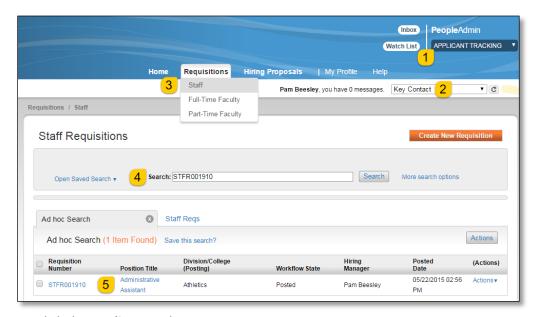


Key Points:

- As a Key Contact, you can only review applicants in the system/ managing the applicant pool at this step if
 you are listed as a Facilitator on the requisition. If you need to be added after the requisition has been posted,
 you will need to contact HR employment to be added.
- A Key Contact may also be a member of a Search Committee.
- As a Key Contact, you will need to indicate who will be a facilitator (ability to managing the applicant pool on the requisition) versus who will be a search committee member (view applicant pool only).
- Applicant Dispositions: Once you review an applicant, 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 (Facilitator Only Review > Reviewed by Facilitator > Screened > Interviewed, etc.). In doing so, Search Committee members and others can view and rank applicants.
 - Reject staff 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 Facilitator Only Review state for later consideration.

Steps to Manage Staff Applicants

- 1. In the Product Module drop-down select Applicant Tracking.
- 2. In the Role drop-down change your role to **Facilitator** (if you are in the system as a Key Contact role, you will not be able to view the applicants).
- 3. Click the **Requisitions** tab and select **Staff.**
- 4. Search for the requisition.
- 5. Click the requisition number or title.



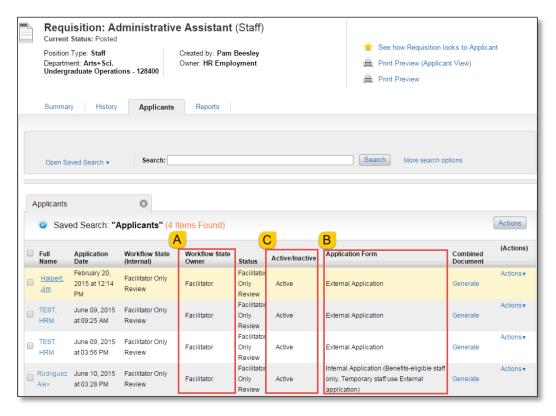
6. Click the **Applicants** tab.



- 7. Applicant tab overview: There are several details available on each applicant. Some columns to note are:
 - a. **Workflow State**: 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' status in order to be visible to the Search Committee.
 - b. **Application Form**: Designates the External vs. Internal Employee application type.
 - c. **Active/Inactive**: If you set up disqualification questions on the requisition and an applicant was disqualified based on their responses, they will not display on this 'Active Applicant' list. You can always view Inactive candidates by clicking the **More search options** link and selecting **Inactive**.



Any Internal candidates should be contacted regarding their candidacy.



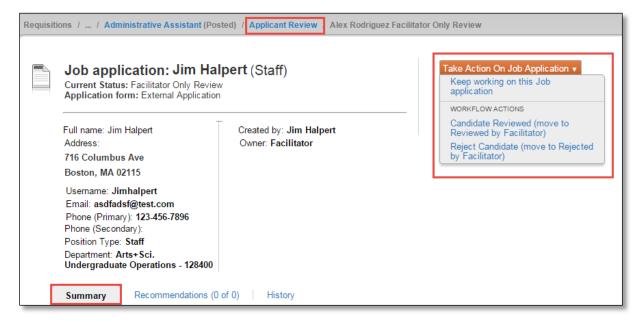
- 8. **Reviewing Applicants:** When reviewing applicants, you have a number of options that are explained in more detail below:
 - A. Review one applicant at a time
 - B. Review applicants 'in bulk'
 - C. Review supplemental questions and answers
 - D. Export search results

A. To review one applicant at a time: Click the applicant's name or click the **Actions** button and select **View Application**.



You can:

- Scroll through the application; on the summary page there are answers to DQs and attached documents such as the resume.
- Take action on an applicant.
- Return to the list of applications.

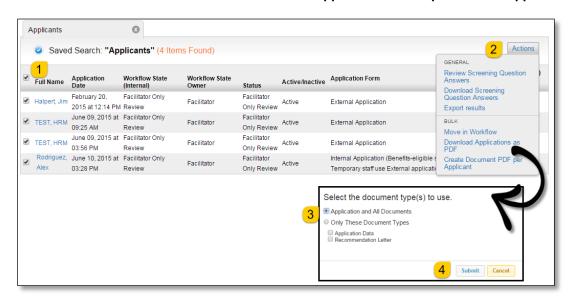


B. To Review applicants 'in bulk' for offline review:

- 1. Select all applicants
- 2. Click on Actions > Download Applications as PDF's
- 3. Select the documents
- 4. Click Submit
- 5. A pdf is created for you to review offline



You will still need to come back into each individual application and disposition the applicant.



C. To Review Supplemental Questions in Bulk:

- 1. Select all applicants
- 2. Click on Actions > Review or Download Screening Question Answers

D. To Export Results in an Excel spreadsheet:

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

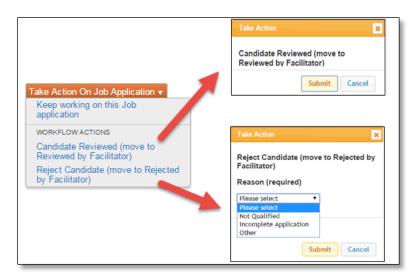
- 9. Take Action on Applicants: There are two options:
 - A. Take action on one applicant
 - B. Take action on applicants 'in bulk'

A. Take Action on one applicant

a. Click on the applicant's name or select the **Actions** link in the row of the applicant and select **View Application**.



- b. In the Applicant view, select **Take Action On Job Application** and select one of the following:
 - Candidate Reviewed (move to Reviewed by Facilitator)
 - Reject Candidate (move to Rejected by Facilitator)
 - Follow the prompts

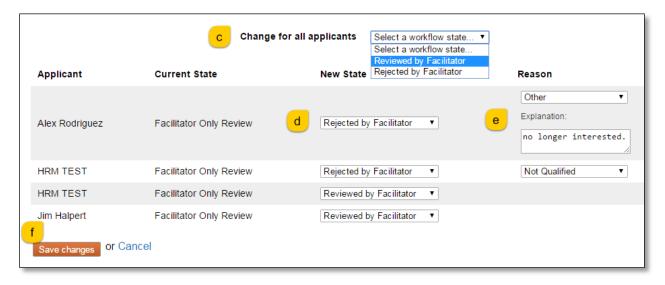


B. Take Action on all Applicants

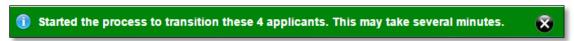
- a. Select all applicants
- Select Actions > Move in Workflow



- c. You can choose to give all applicants the same disposition by making a selection in the **Change for all applicants** drop-down.
- d. If you want to give a different disposition to each candidate, go down the list and make a selection in the New State drop-downs.
- e. If you select Rejected, you will need to select a Reason.
- f. Click Save Changes



g. 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 users will now have the ability to view these applicants.

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

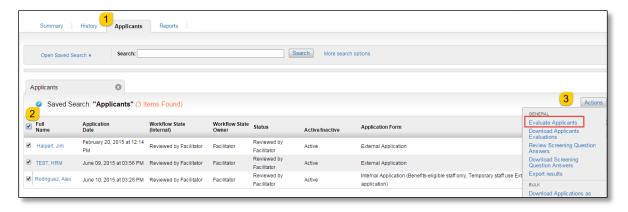
- Preliminary Screened by Facilitator (optional)
- Interviewed by Facilitator (required).

Once Interviewed is selected, the Facilitator can select **Finalist** – and then it's ready to go to OIDI. Afterwards, the Facilitator will not be able to take any actions on these applicants.

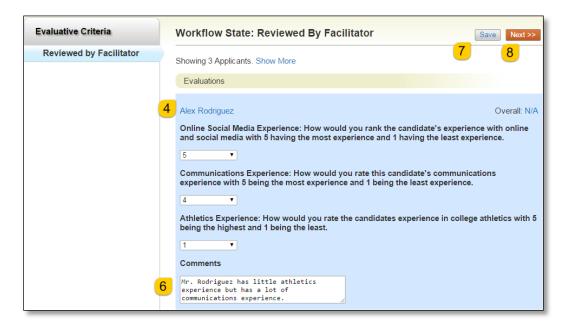
Lesson 7: How to Rank an Applicant (Search Committee Members)

If Ranking Criteria has been selected by the Facilitator for a requisition, and if the requisition is in the correct workflow state, you will be able to enter rankings.

- 1. Navigate to the requisition and select the **Applicants** tab.
- 2. Select all applicants.
- 3. Click on the **Actions** button and choose **Evaluate Applicants**.



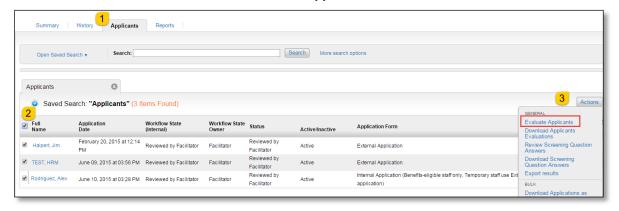
- 4. Click on the name to review the application again, if necessary. This will open a new tab in your browser.
- 5. Close the tab to return to this page and continue on to the next step.
- 6. Enter a ranking and a comment. Scroll to all applicants on the page to enter rankings.
- 7. Click Save.
- 8. To navigate back to the previous page click **Applicant Review** on the path, click **Next**, or your browser's back button.



Lesson 8: How to View Applicant Evaluations (Search Committee Chair)

If Ranking Criteria has been selected by the Facilitator for a requisition, and if the requisition is in the correct Workflow State, the **Search Committee Chair** will be able to enter and view rankings of all other search committee members.

- 1. Navigate to the requisition and select the **Applicants** tab.
- 2. Select all applicants.
- 3. Click the **Actions** button and choose **Evaluate Applicants**.



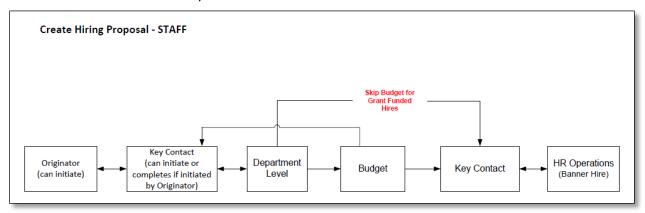
4. To learn how to rank the applicants, review lesson 7. To view the rankings and comments of all search committee members, click **View Detailed Entries**.



- 5. Evaluations can only be viewed one applicant at a time. Select the name of the candidate you want to review.
- 6. View evaluations that have been entered to date.
- 7. Use the browser back button to go back to the detailed entries page. To navigate back to the previous page click **Applicant Review** on the path, click **Next** or use your browser's back button.

Lesson 9: Initiating a Staff Hiring Proposal

This process can begin when OIDI has reviewed the EEO reports, the applicants and has forwarded the selected finalist in the workflow to the Key Contact.

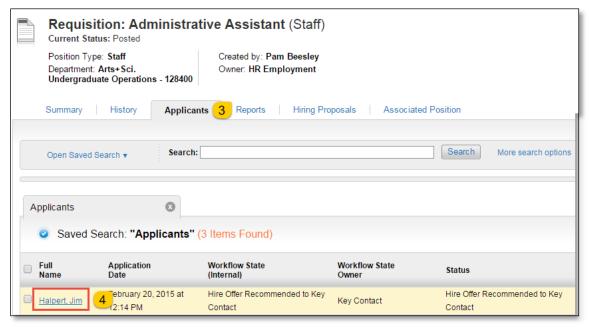


Steps to Initiate a Staff Hiring Proposal

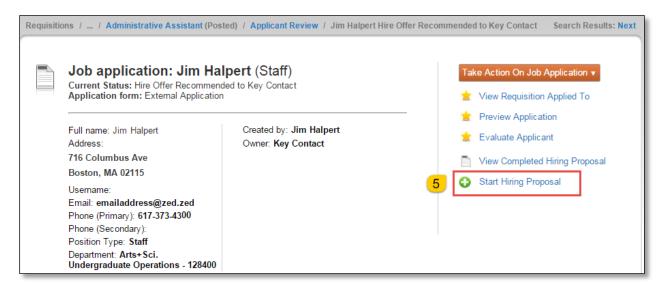
- 1. Go to your homepage inbox.
- 2. Under the **Requisitions** tab navigate to the requisition and open it. Or find the requisition in your Watch List and click on the title to open.



- 3. Click on the Applicants tab.
- 4. Click on the name of applicant you want to hire.



5. Click the **Start Hiring Proposal** button on the right side of the page.

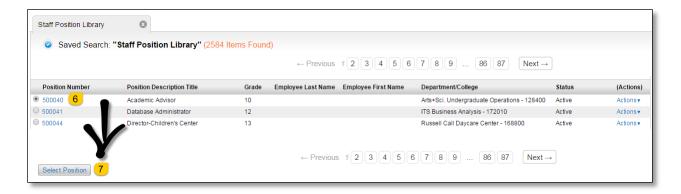


6. A positions listing will display; the position to which the requisition was originally attached, will be selected by default. You may review position information by clicking on the position number.

Note: The position selected in this step will be attached to the applicant's new hire record in Banner.

In some cases you may need to select another position number for this hiring proposal. In this case, search for the position number and select the radio button next to the position number and you can select another position for this Hiring Proposal.

7. After selecting the position, scroll to the bottom of the page and click the Select Position button.



8. Complete the **Hiring Proposal Form** by scrolling down the page and completing the required and necessary fields. Click **Next** to move through to the end of the proposal or click **Save** to save your progress. Use the table below for instructions on each field. Require field have an asterisk (*):

Hiring Proposal Form					
Field			Notation about the Field		
Document Information section:					
Requisition Number			Auto-assigned when the requisition was created		
Applicant Confirmation Number			Auto-assigned when the Applicant submitted their application		
Candidate Information section (PPAIDEN): Some fields have already been completed by the applicant. Fill in any additional fields as necessary.					
These fields will be fed to the PPAIDEN form in Banner as the new hire record.					
Prefix	*Address 1	*Natio	on	Race	
*First Name	Address 2	Phone	Туре	Military Status	
Middle Name	*City	*Telep	Telephone *Email Address		
*Last Name	*State	Gende	der		
Suffix	*Postal Code	Are yo	ou Hispanic or Latino(a)?		
Employee Information section (PEAEMPL): These fields will be fed to the PEAEMPL form in Banner as the new hire record.					
*Appointment Type			New Hire, Rehire or Transfer/Promotion		
*Employee Class			Auto-assigned when the requisition was created		
*Hire Date			Date the employee is starting		
*Campus Phone			Campus phone number		
*Campus Address			Enter if available		
*Mail Drop			Enter Campus Mail Drop		
Job Information section (NBAJOBS): These fields will be fed to the NBAJOBS form in Banner as the new hire record.					
Position Title			Populated from the position		
Job Code			Populated from the position		
Position Number			Populated from the position		
*Annual Salary			Key Contact must enter a value here.		
Hourly Rate			Enter if applicable		

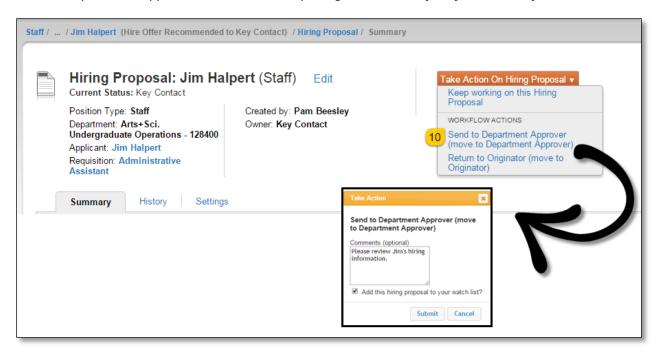
Min Expected Hiring Range	Blank or populated from the requisition			
Max Expected Hiring Range	Blank or populated from the requisition			
Shift	Enter if applicable			
Hours per day	Populated from the requisition			
Contract Start Date	Enter if applicable			
Contract End Date	Enter if applicable			
Grant Funded End Date	Enter if applicable			
Appointment End Date	Enter if applicable			
*Standard Hours	Enter standard hours			
Position Funding Information section (NBAJOBS): Pulled from position				
Additional Funding Information : Indicate changes to Position Funding source(s) or any additional payments needed, along with the funding source(s). Click the Add button to add the sources.				
Offer Letter Information: Directions for offer letter				
Return Letter by	Enter date			
Questions Contact	Point of Contact for offer letters			
Verifying Requirements: Details on verification of ed	ducation, employment and references.			
If this position has an education requirement, has the candidate's degree(s) been verified?	No/Yes			
*Degree Verified by	Enter name			
*Date of Degree Verification	Enter date			
* Has the candidate's last seven years of employment history been confirmed?	No/Yes			
* Employment Verified by	Enter name			
* Date of Employment Verification	Enter date			
* Have at least 2 professional references been completed on the candidate?	No/Yes			
* References Checked by	Enter name			
* Date of Reference Check	Enter date			
Additional Comments: Enter any final comments here about the hiring proposal.				

9. Once you have finished completing all of the fields, click **Next** to move to the summary. Click **Save** if you can't complete all of the fields at once.

10. Once you are ready to make a hire, click the **Take Action** drop-down and select the **Department Approver** option.



The Department Approver will be able to skip Budget in the Workflow for all Grant-funded hires.

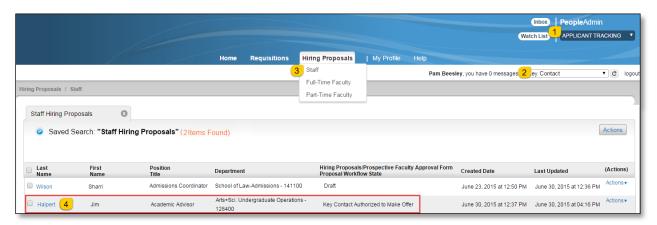


Lesson 10: Finalized Hiring Proposal – Ready to Make Offer

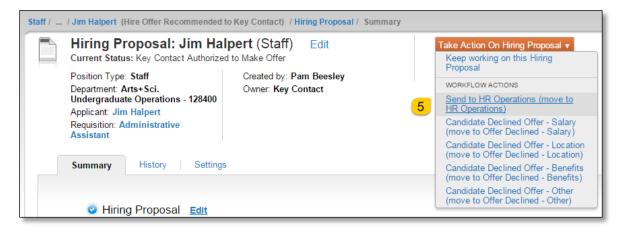
When all approvals have been completed, the Key Contact can make the official offer and will need to transition the hiring proposal to HR Operations in PeopleAdmin.

Steps to Transition New Hire to HR

- 1. In the Product Module select the Applicant Tracking.
- 2. In the Role drop-down select Key Contact.
- 3. Click the Hiring Proposals tab and select Staff.
- 4. Navigate to the applicant you are going to hire and click the last name. Note that the Status is **Key Contact Authorized to Make an Offer.**



- 5. Click **Take Action on Hiring Proposal** to move it through the Workflow:
 - Keep working on this Hiring Proposal: You intend to come back to this.
 - **Send to HR Operations**: Move it 'forward' in the workflow.
 - Candidate Declined Offer [reason]: Select this in the event the offer was made and it was declined. Pick the corresponding reason.



HR Operations will then move the Hiring Proposal to the Status of **Hire Approved Position Updated** once the hire packet has been received.

The Key Contact will then transition the requisition to HR Employment. This completes the hire process.