



Northeastern

# PeopleAdmin

The Role of an Approver

End User Guide

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## 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.

### 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.**

### Home Page Content

1. **Product Module** – Press this button to switch 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. **Inbox** – Stores actions that reach you as part of the Workflow. Opening the Inbox using this icon will show an expanded view of the information in the Inbox. You can also see your Inbox as a window within the Home Page.
  - In eRecruit, this was called a Worklist. Items in your inbox require an action on your part; it is likely to be an action requiring your approval.
  - You can easily access the specific item directly via the inbox, review, 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 NEU Outlook program to alert you that something new is in your PeopleAdmin Inbox.
4. **Watch List** –Stores Requisitions and Hiring Action items that you choose to 'watch'. Opening the Watch List using this icon will show an expanded view of the information in the Inbox. You can also see your Watch List as a window within the Home Page.
5. **Messages** – Only used if you run reports in PeopleAdmin.
6. **Shortcuts** (Window content managed by HRM)
7. **My Links** (Window content managed by HRM)

## Home Page Navigation

The screenshot shows the PeopleAdmin Home Page with several annotations explaining navigation elements:

- Product Module (Position Mgmt or Applicant Tracking):** Points to the top navigation bar.
- Inbox:** Points to the 'Inbox' link in the top right.
- Watch List:** Points to the 'Watch List' link in the top right.
- APPLICANT TRACKING:** Points to the dropdown menu in the top right.
- Home, Requisitions, Hiring Proposals, My Profile, Help:** Points to the main navigation bar.
- Jill Smith, you have 0 messages:** Points to the user profile and message count.
- Department Approver:** Points to the role selector dropdown.
- Role Selector:** Points to the dropdown arrow.
- Refresh Role:** Points to the refresh icon.
- logout:** Points to the logout link.
- Messages: Relevant only to reports that have been run:** Points to the message notification area.
- Welcome to your Online Recruitment System:** Points to the main heading.
- Inbox: Actions that have reached you as part of the Workflow:** Points to the 'Inbox' section header.
- Shortcuts:** Points to the 'Shortcuts' section on the right.
- My Links:** Points to the 'My Links' section on the right.
- Useful Links:** Points to the 'Useful Links' section on the right.
- Watch List: You choose what to 'watch':** Points to the 'Watch List' section header.

The main content area includes two tables:

**Inbox (1 items need your attention)**

Displaying items for group "Department Approver".

Requisitions (0) Hiring Proposals (0) Actions (1)

Job Title	Type	Current State	Owner
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**Watch List (1 items)**

Requisitions (0) Hiring Proposals (0) Actions (1)

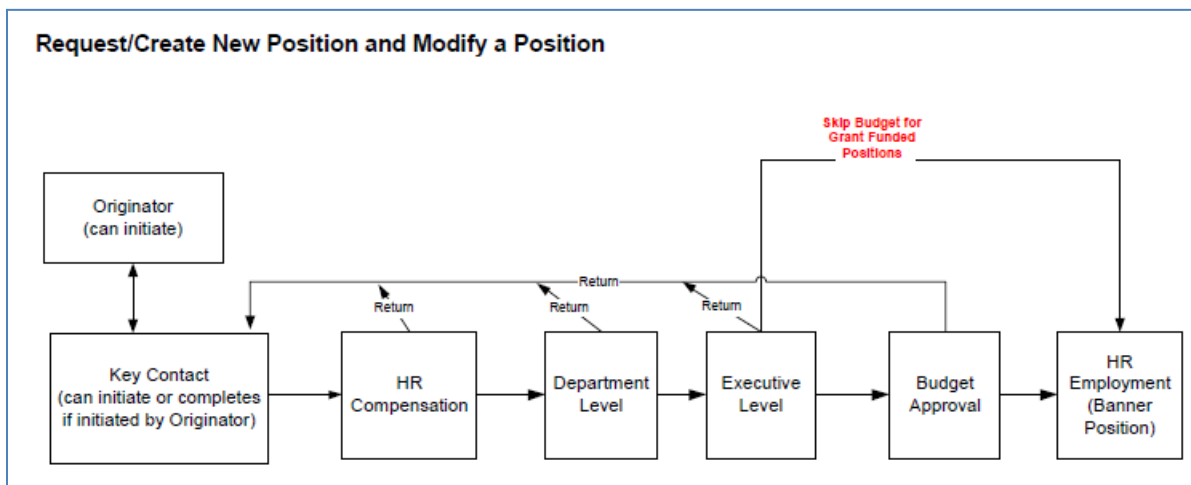
Job Title	Type	Current State	State Owner
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The footer contains the PeopleAdmin logo, the tagline "Talent Management Made Easy", the copyright notice "Copyright 2012 All Rights Reserved.", and a "Help" link.

## Position Management

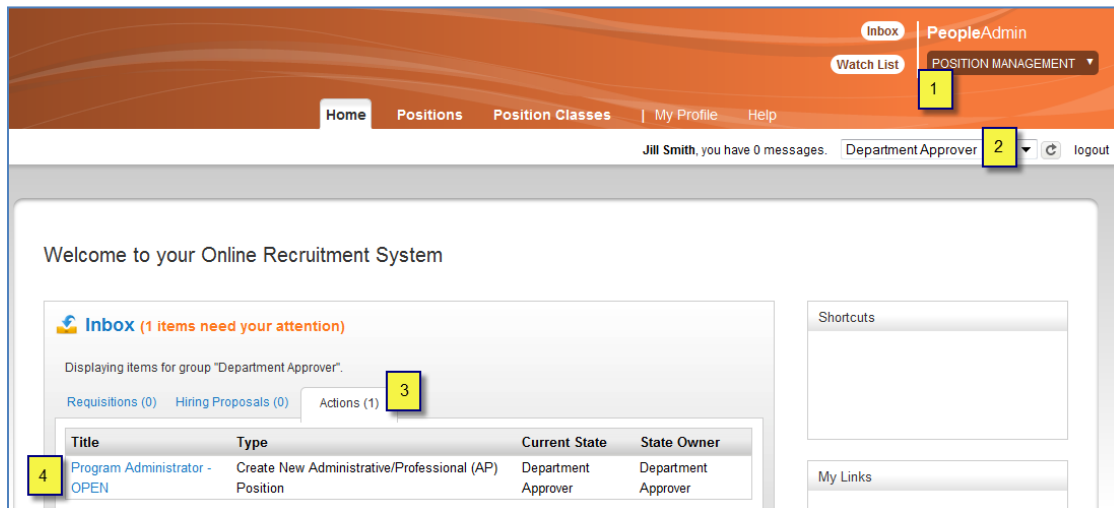
### STAFF: Approve a Position Action – Department Approver, Executive, Budget

- The four (4) paper forms used in the past (Position Management Activity form (PMA), HR/Comp Memo, HR/Comp Evaluation Memo, and the Job Description) have been replaced with a **single online form found in PeopleAdmin**.
- Roles within the Position Action Approval Workflow:
  - PeopleAdmin users who are in certain roles will be responsible for approving Position Actions and forwarding them ahead in the Workflow.
  - These users will receive an automated NEU email to notify them that an action is awaiting their approval. The PeopleAdmin inbox will contain the action for which their approval is requested. Actions that flow through approvals are: New Position, Modified Position, and Post Position with no Changes.
  - The Key Contact can monitor the approval stages via their Watch List.



## Steps to Approve a Position Action

1. Select the Product Module of Position Management
2. Select your Role (Department Approver, Executive or Budget)
3. Open the Actions tab in your Inbox
4. Click on the Position title.



On the next page you can view the attributes of the Position

- ✓ The Summary tab: View all sections of the Form on this page.
- ✓ The History tab: View the changes and workflow steps that have transpired during the life of the Position.
- ✓ The Settings tab: View the Organization levels attached to this position.


5. Press Take Action on Action

- Keep working on this Action - allows you to come back later.
- Send to - this forwards the action to the next 'Approver' in workflow.
- Return to – this sends the action backwards in the workflow.
- Deny Request: this cancels the action, the initiator of this action must start again.

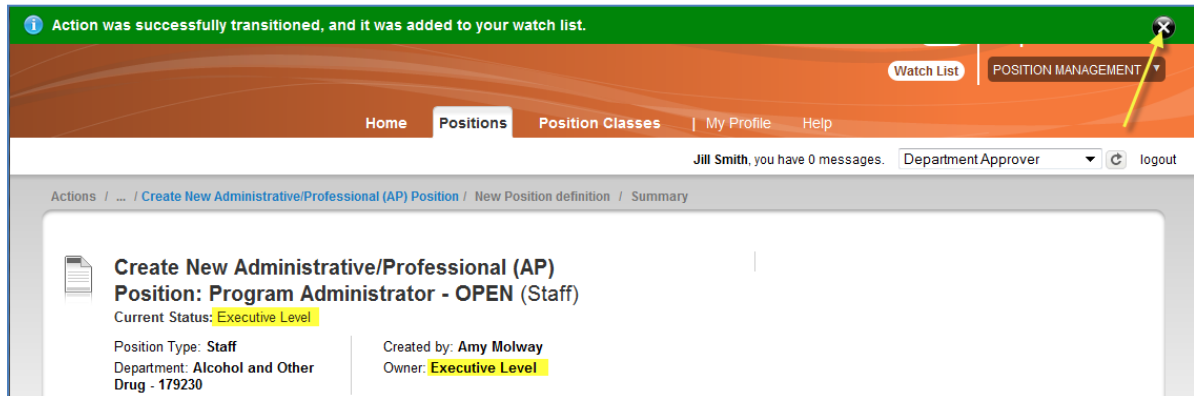
**\*You may add a note in the Take Action window and press Submit.**

The screenshot displays the PeopleAdmin web interface. The top navigation bar includes links for Home, Positions, Position Classes, My Profile, and Help. The user is logged in as Jill Smith, with a message count of 0 and a role of Department Approver. The main content area shows the 'Create New Administrative/Professional (AP) Position' page for 'Program Administrator - OPEN (Staff)'. The page includes fields for Current Status (Department Approver), Position Type (Staff), Department (Alcohol and Other Drug - 179230), and Created by (Amy Molway). A yellow box with the number '5' highlights the 'Take Action On Action' dropdown menu. The dropdown menu is open, showing workflow actions: 'Keep working on this Action', 'Send to Executive Level Approver (move to Executive Level)', and 'Return to Key Contact (move to Key Contact)'. A curved arrow points from the 'Send to Executive Level Approver' option to the 'Take Action' modal window. The modal window has a title bar 'Take Action' and a close button. The main text in the modal is 'Send to Executive Level Approver (move to Executive Level)'. Below this is a 'Comments (optional)' section with a text area containing 'Thank You'. At the bottom, there is a checkbox labeled 'Add this action to your watch list?' which is checked. The modal concludes with 'Submit' and 'Cancel' buttons. A yellow arrow points to the 'Submit' button.

The next page shows the results of your submission:

A green bar with the 'success' message appears next (press the x icon  to close the green bar). 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.

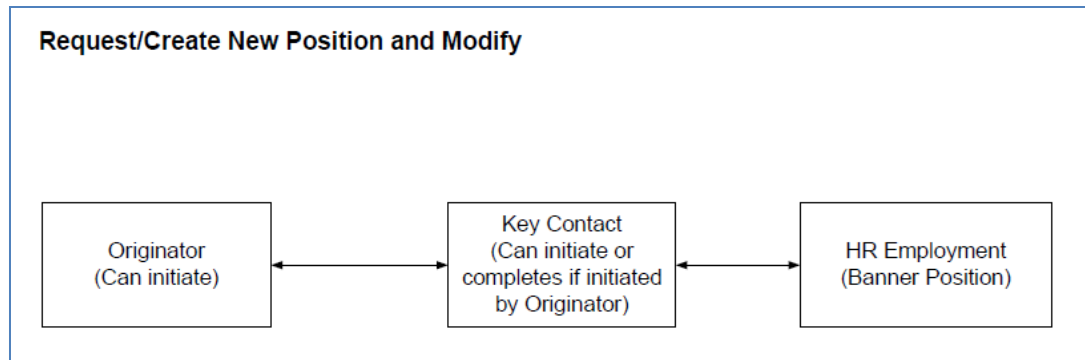
**Current Status** and **Owner** changes to values reflected in the next step in the Workflow.





## FACULTY: Approve a Position

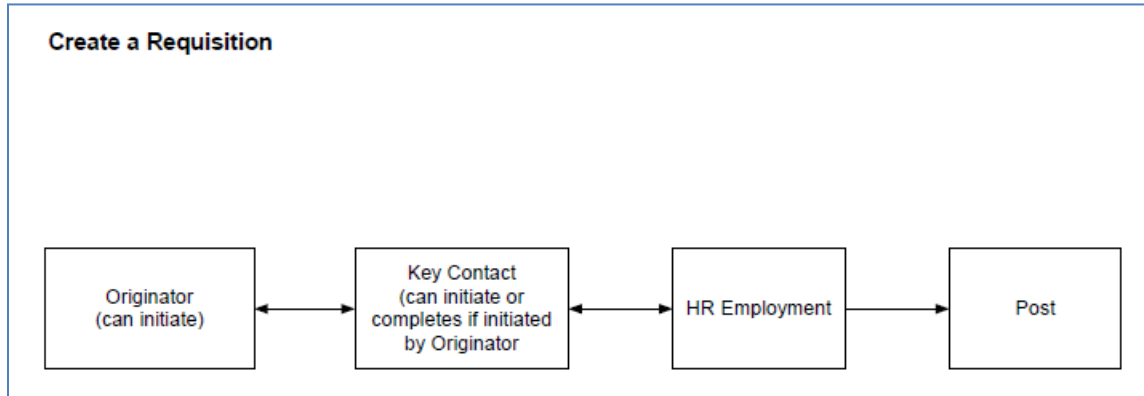
The Position Management Activity Form (PMA) has been replaced with an online form found in PeopleAdmin. Faculty positions will be 'approved' by HRM and the Requisition will have the former PMA and or Provost approvals.



## Requisitions and Postings

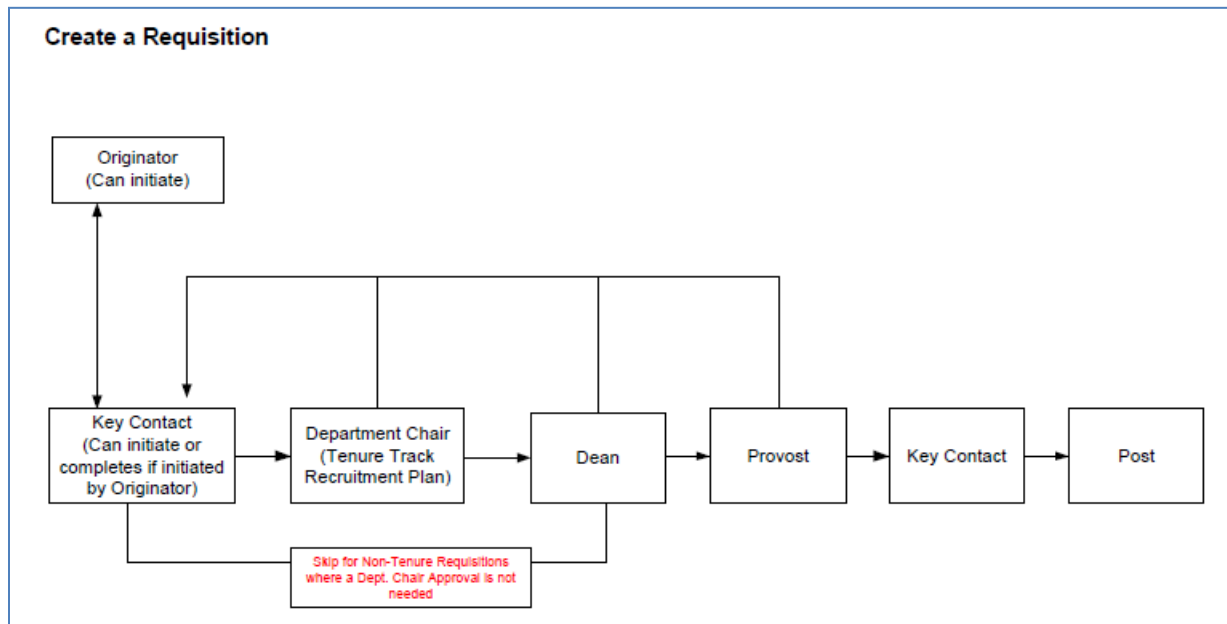
### STAFF: Approve a Posting

Staff Postings are approved by HR Employment as the Position Action contained the approval of the Department, Executive and Budget.



## FACULTY: Approve a Requisition and Recruitment Plan – Department Chair, Dean, Provost

- Roles within the Requisition Approval Workflow:
  - Each 'Approver' will review the Requisition when it has been moved forward in the workflow. The End User can edit, return (send 'backward' in the workflow) or approve (send 'forward' in the workflow).



## Steps to Approve a Faculty Posting

1. Go to Applicant Tracking Module
2. Change role (i.e., to Department Chair)
3. From the Home page, go to the Inbox and click on the Requisition Title.

The screenshot displays the PeopleAdmin Applicant Tracking Module interface. The top navigation bar includes links for Home, Requisitions, Hiring Proposals, My Profile, and Help. The user is logged in as Jill Smith, and the current role is set to Department Chair. The main content area shows a welcome message and an Alerts section with one alert from the administrator. Below the alerts is an Inbox section with one item needing attention. The Inbox table lists a requisition for a Professor - Chemical Engineering, which is currently in the Department Chair's state. The table has columns for Job Title, Type, Current State, and Owner. The requisition is highlighted with a yellow box labeled 3. The right sidebar contains shortcuts for creating new full-time and part-time faculty requisitions, and useful links for training videos, applicant portal, and customer portal login.

PeopleAdmin  
Inbox  
Watch List  
APPLICANT TRACKING

Home Requisitions Hiring Proposals My Profile Help

Jill Smith, you have 0 messages. Department Chair logout

Welcome to your Online Recruitment System

**Alerts** (1 alert from the administrator)

Type	Message
i	Today's PeopleAdmin Demo is being presented by Liz Mace and Betty Rodriguez.

**Inbox** (1 items need your attention)

Displaying items for group "Department Chair".

Requisitions (1) Hiring Proposals (0) Actions (0) Special Handling Lists (0)

Job Title	Type	Current State	Owner
Professor - Chemical Engineering	Full-Time Faculty	Department Chair	Department Chair

**Shortcuts**

- Create New Full-Time Faculty Requisition
- Create New Part-Time Faculty Requisition

**My Links**

**Useful Links**

- Training Videos  
(Go here for helpful videos for staff training on the use of PA7.)
- Your Applicant Portal  
(How Applicants access your PeopleAdmin system)
- PeopleAdmin MOPAC - Customer Portal Login  
(best practice library, customer support portal, customer community)

4. The Summary page appears next.

➤ Tabs on this page:

- History – This displays all the historical transaction (and comments) of the Requisition, as it moves through the Workflow.
- Settings – This is where you can view the Organization fields
- Applicants – Those who apply to this posting will be listed here.
- Hiring Proposals – View all associated Hiring Proposals here (if applicable).
- Associated Position – This shows you detailed Position information.
- Reports - Provides summary statistics on the applicant pool for EEO and/or departmental review.

5. To Review the Requisition, scroll the length of this summary page. You will see all sections and fields of the form here.

6. To Edit the Requisition, press any of the Edit links

The screenshot shows the 'Summary' page of a requisition in PeopleAdmin. The page title is 'Requisition: Professor - Chemical Engineering (Full-Time Faculty)'. The current status is 'Department Chair'. The position type is 'Full-Time Faculty' and the department is 'Chemical Engineering - 123000'. The requisition was created by 'Jill Smith' and the owner is 'Department Chair'. There are tabs for 'Summary', 'History', 'Settings', 'Applicants', 'Reports', and 'Hiring Proposals'. The 'Summary' tab is selected, showing instructions on how to take action or edit the posting. A table at the bottom displays 'NU Posting Detail Information' with the following data:

Posting Title	Professor - Chemical Engineering
Division/College (Posting)	College of Engineering
Department	College of Engineering

7. Type your change(s) in the field(s) as necessary.
8. Press Save
9. You can navigate to other fields in the Requisition by using the left hand menu items. To finalize your edits, go to the Summary page.

10. To Approve this Requisition (move it forward in the workflow) press the 'Take Action on Requisition' button and select Send to Dean.

The **Take Action** selection will move this Requisition to the next step in the Workflow (see the Flow Charts). Four choices are:


- **Keep working on this Action:** The saves the form and allows you to go back in later and continue working on it before taking action.
- **Send to Dean:** This moves the action 'forward' in the workflow.
- **Return to Key Contact:** This moves the action 'backward' in the workflow.

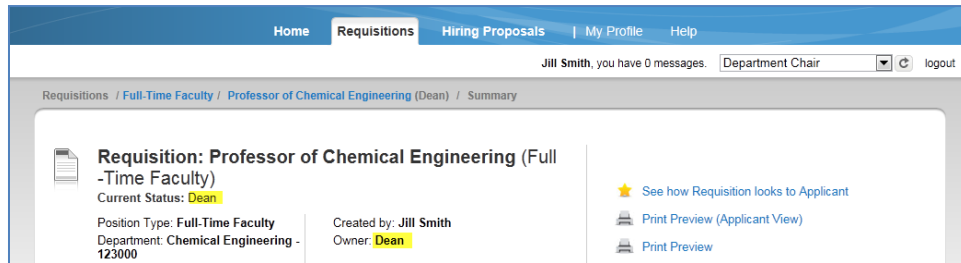
11. The Take Action window appears next.

**The Take Action window:**

- You can enter a **comment** which would appear in the transition email to HR/Employment. (Comments do not get stored in the Req or Posting).
- The checkbox for **"This requisition is currently in your watch list."** is defaulted as checked. You can monitor the subsequent activity of this action using your Watch List.

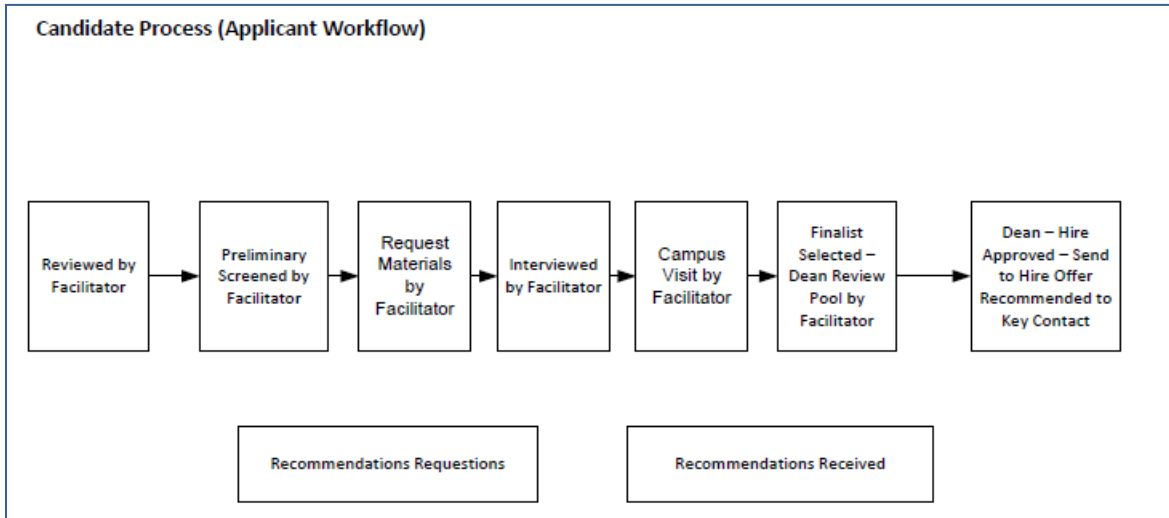
12. The next page shows the results of your submission:

- Green bar with the 'success' message appears next (press the x icon  to close the green bar). 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.
- Status and Owner indicators now reflect the next step in the Workflow. You now cannot edit the Requisition.



## Managing Applicant Pools

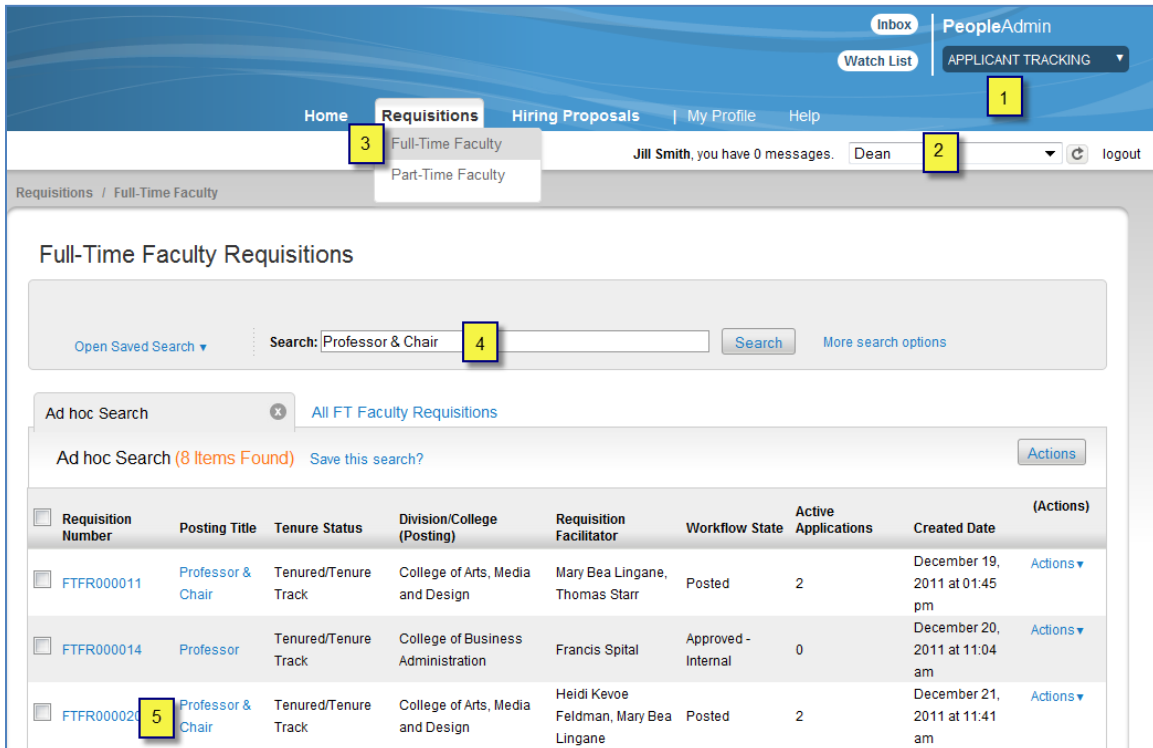
### FACULTY: Approve an Applicant Pool – Dean





## Steps to Approve a Finalist Candidate – Dean (Dean Review Pool)

1. Select the Product Module of Applicant Tracking
2. Select your Role (Dean)
3. Go To Requisitions > Full-Time Faculty
4. Search for the Requisition
5. Click on the Title



The screenshot displays the PeopleAdmin interface for a Dean. The top navigation bar includes links for Home, Requisitions, Hiring Proposals, My Profile, and Help. The Requisitions menu is expanded, showing Full-Time Faculty (highlighted with a yellow box labeled 3) and Part-Time Faculty. The user's role is set to Dean (highlighted with a yellow box labeled 2). The search bar contains the text "Professor & Chair" (highlighted with a yellow box labeled 4). Below the search bar, the results show a table of Full-Time Faculty Requisitions. The first row is highlighted, and the "Professor & Chair" link in the Posting Title column is highlighted with a yellow box labeled 5.

Requisition Number	Posting Title	Tenure Status	Division/College (Posting)	Requisition Facilitator	Workflow State	Active Applications	Created Date	(Actions)
FTFR000011	Professor & Chair	Tenured/Tenure Track	College of Arts, Media and Design	Mary Bea Lingane, Thomas Starr	Posted	2	December 19, 2011 at 01:45 pm	Actions
FTFR000014	Professor	Tenured/Tenure Track	College of Business Administration	Francis Spital	Approved - Internal	0	December 20, 2011 at 11:04 am	Actions
FTFR000021	Professor & Chair	Tenured/Tenure Track	College of Arts, Media and Design	Heidi Kevoe Feldman, Mary Bea Lingane	Posted	2	December 21, 2011 at 11:41 am	Actions

6. Select the Applicants tab
7. Select the Candidate who is the Finalist

**Note: If you have not already been provided with your diversity report, select the Reports tab and then select 'Departmental EEO Report.' Another window will appear where the report is being generated. Wait 10 seconds and then hover over the Actions link to 'View Report.'**

Requisitions / Full-Time Faculty / Professor & Chair (Posted) / Applicant Review

**Requisition: Professor & Chair (Full-Time Faculty)**  
 Current Status: Posted  
 Position Type: Full-Time Faculty  
 Department: Communication Studies - 132250  
 Created by: Mary Bea Lingane  
 Owner: Key Contact

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

Summary | History | **Applicants** | Reports | Hiring Proposals

Open Saved Search ▾ Search:  Search More search options

FT Faculty Applications

✓ Saved Search: "FT Faculty Applications" (2 Items Found) Actions

Full Name	Posting Number	Application Date	Workflow State (Internal)	Workflow State Owner	Status	Active/Inactive	(Actions)
Ortiz, David	FTFR000020	January 09, 2012 at 10:41 am	Dean Review Pool	Dean	Dean Review Pool	Active	Actions ▾
Brady, Tom	FR000020	January 09, 2012 at 11:02 am	Dean Review Pool	Dean	Dean Review Pool	Active	Actions ▾

8. To move the candidate 'forward' in the Workflow, select the Take Action on Job Application button and click on Approve Pool – Select as Finalist.

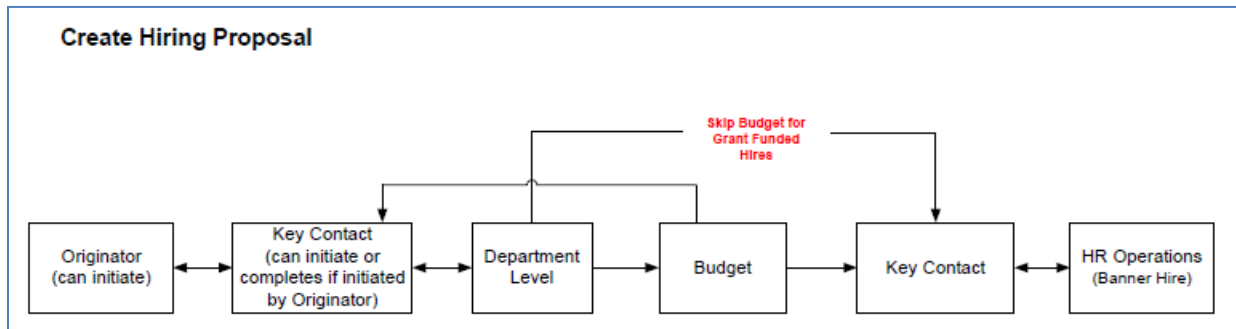
Requisitions / ... / Professor & Chair (Posted) / Applicant Review / Tom Brady Dean Review Pool Search Results: Previous

**Job application: Tom Brady (Full-Time Faculty)**  
 Current Status: Dean Review Pool  
 Application form: Faculty Application  
 Full name: Tom Brady  
 Address:  
 Created by: Tom Brady  
 Owner: Dean

Take Action On Job Application ▾  
 WORKFLOW ACTIONS  
 Keep working on this Job application  
**Approve Pool - Select as Finalist (move to Selected as Finalist)**  
 Approve Pool - Select as Finalist (move to Selected as Finalist)

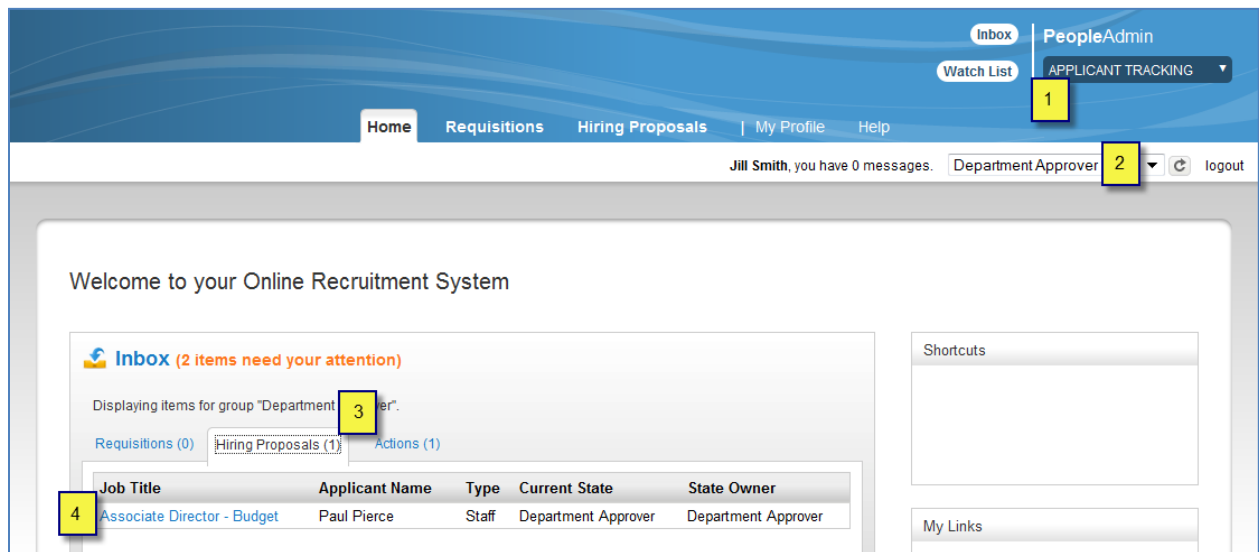
## Hiring Employees

### STAFF: Approve a Hiring Proposal – Budget, Department Approver

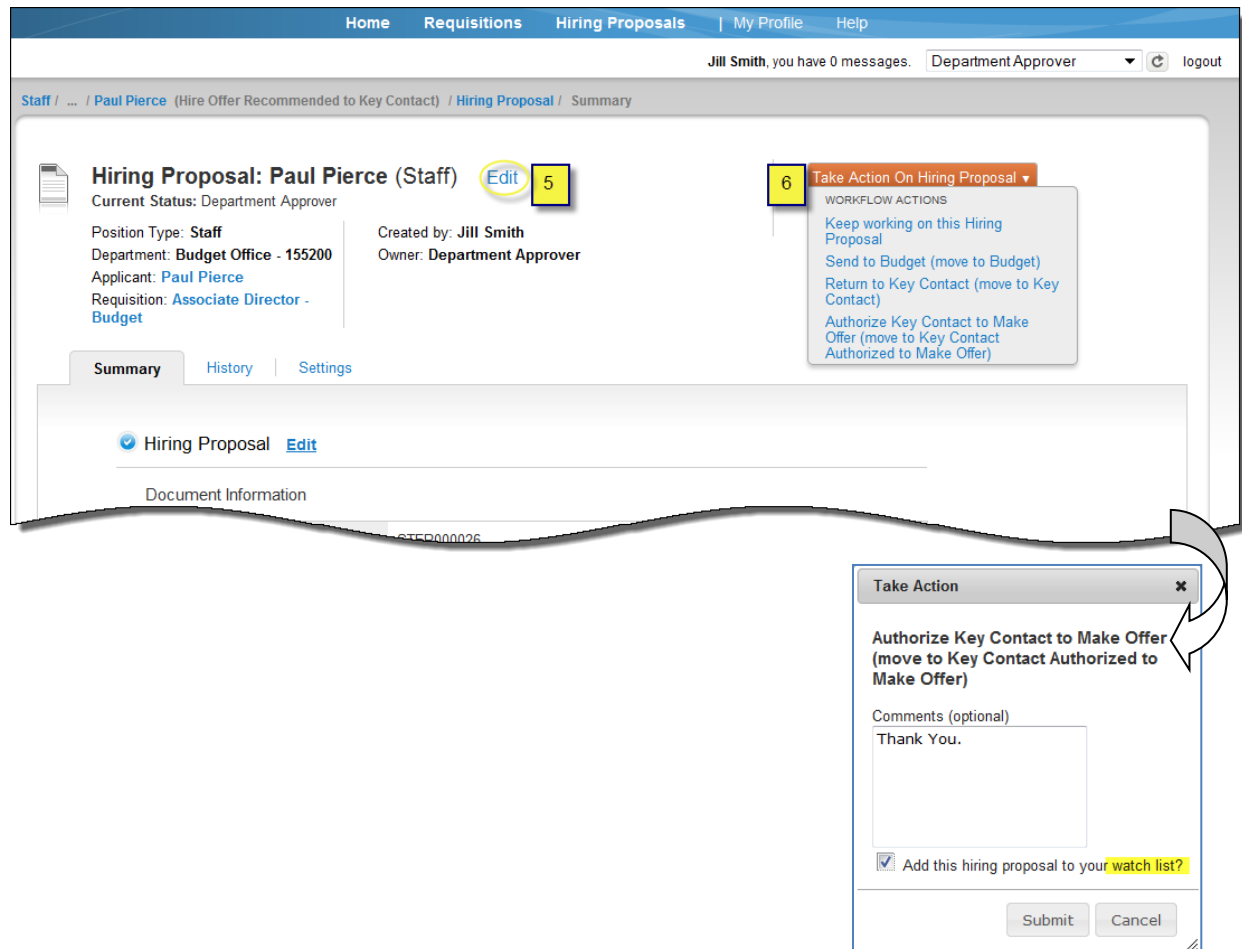


## Steps to Approve a Staff Hiring Proposal

1. Select the Product Module of Applicant Tracking
2. Select your Role (Department Approver, Budget)
3. Open the Hiring Proposals tab in your Inbox
4. Click on the Position title.

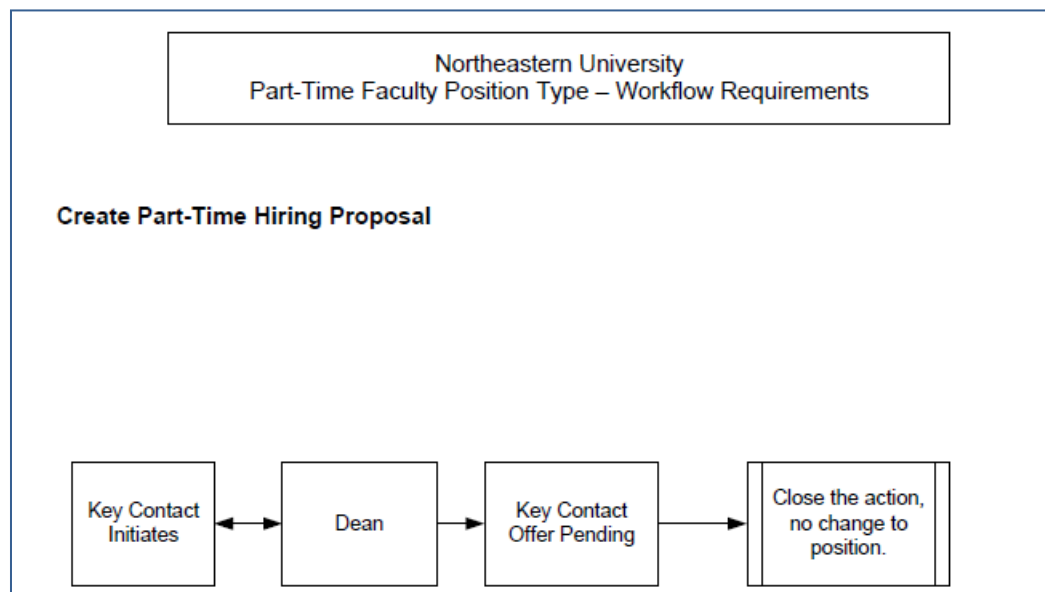
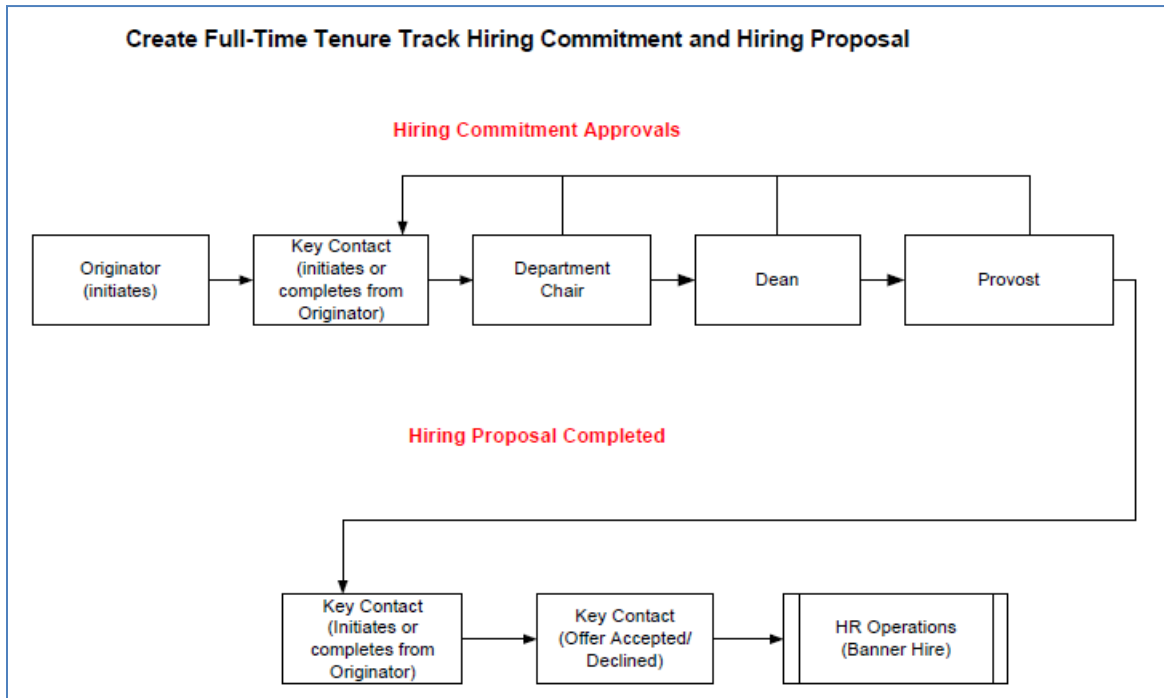


5. Press Edit anywhere in the page to make an edit to the Hiring Proposal.
6. To take action, Press Take Action on Hiring Proposal. The Take Action selection will move this Requisition to one of the Posting options:
  - Keep working on this Hiring Proposal: The saves the form and allows you to go back in later and continue working on it before taking action.
  - Send to Budget: Moves this 'forward' in the workflow. (Required for all Hires not funded by Grants)
  - Return to Key Contact: Moves this 'backward' in the workflow.
  - Authorize Key Contact to make Offer: Moves this 'forward' in the workflow.



## FACULTY: Approve a Hiring Commitment – Dept. Chair, Dean, Provost

This process can begin when the Dean has approved the pool, and has forwarded the finalist to the Key Contact.

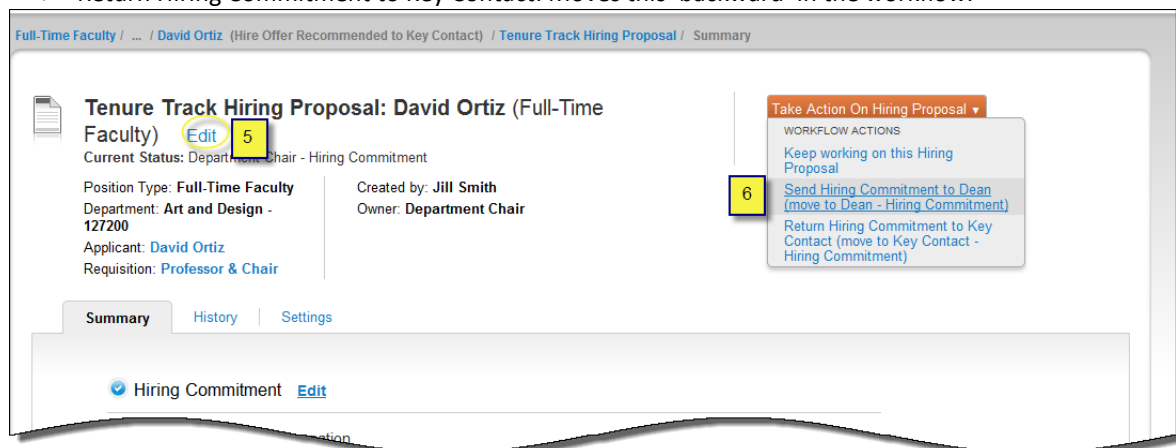


## Steps to Approve a Faculty Hiring Commitment

1. Select the Product Module of Applicant Tracking
2. Select your Role (ie., Department Chair, Dean)
3. Open the Hiring Proposals tab in your Inbox
4. Click on the Job title.



5. Press Edit anywhere in the page to make an edit to the Hiring Proposal.
6. To take action, Press Take Action on Hiring Proposal. The Take Action selection will move this Requisition to one of the Posting options:
  - Keep working on this Hiring Proposal: This saves the form and allows you to go back in later and continue working on it before taking action.
  - Send Hiring Commitment to - Moves this 'forward' in the workflow.
  - Return Hiring Commitment to Key Contact: Moves this 'backward' in the workflow.



## Full-Time and Part Time (Non Tenure Track) Faculty Hiring Proposals

Please see the instructions for the Tenure Track Hiring Proposals. The tasks are the same with, the following exceptions:

- There is no Hiring Commitment
- The workflow has less 'Approvals'

