



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 pointing to key features:

- Product Module (Position Mgmt or Applicant Tracking)**: Points to the top navigation bar.
- Inbox**: Points to the top navigation bar.
- Watch List**: Points to the top navigation bar.
- PeopleAdmin**: Points to the top navigation bar.
- APPLICANT TRACKING**: Points to the top navigation bar.
- Home**: Points to the top navigation bar.
- Requisitions**: Points to the top navigation bar.
- Hiring Proposals**: Points to the top navigation bar.
- My Profile**: Points to the top navigation bar.
- Help**: Points to the top navigation bar.
- Jill Smith, you have 0 messages.**: Points to the user profile area.
- Department Approver**: Points to the role selector dropdown.
- logout**: Points to the logout button.
- Role Selector**: Points to the role selector dropdown.
- Refresh Role**: Points to the refresh role button.
- Messages: Relevant only to reports that have been run.**: Points to the messages area.
- Inbox: Actions that have reached you as part of the Workflow**: Points to the inbox section.
- Watch List: You choose what to 'watch'.**: Points to the watch list section.

Welcome to your Online Recruitment System

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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Shortcuts

My Links

Useful Links

[Your Applicant Portal](#)
(How Applicants access your PeopleAdmin system)

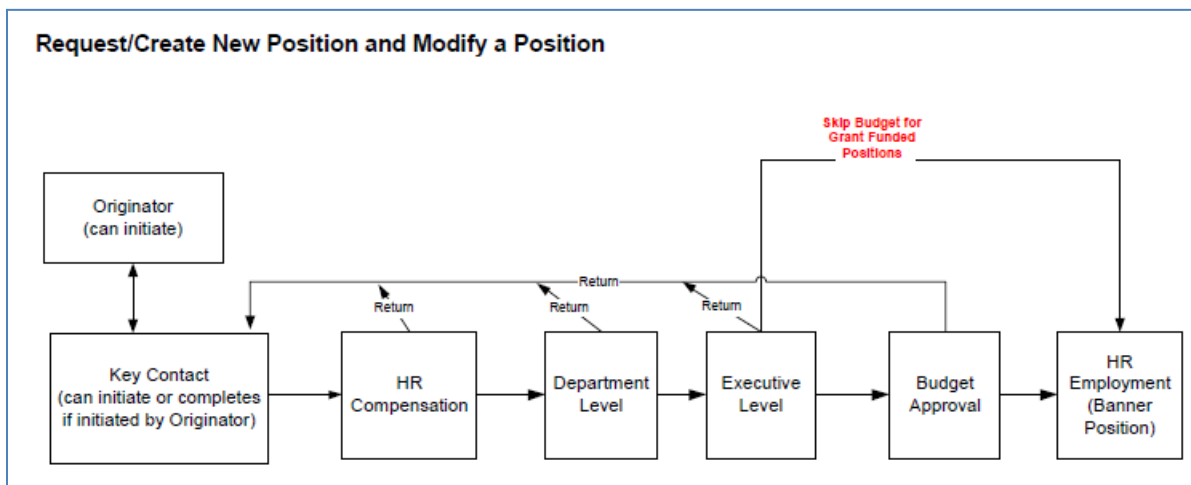
Footer:

PeopleAdmin Talent Management Made Easy Copyright 2012 All Rights Reserved. Help

Position Management

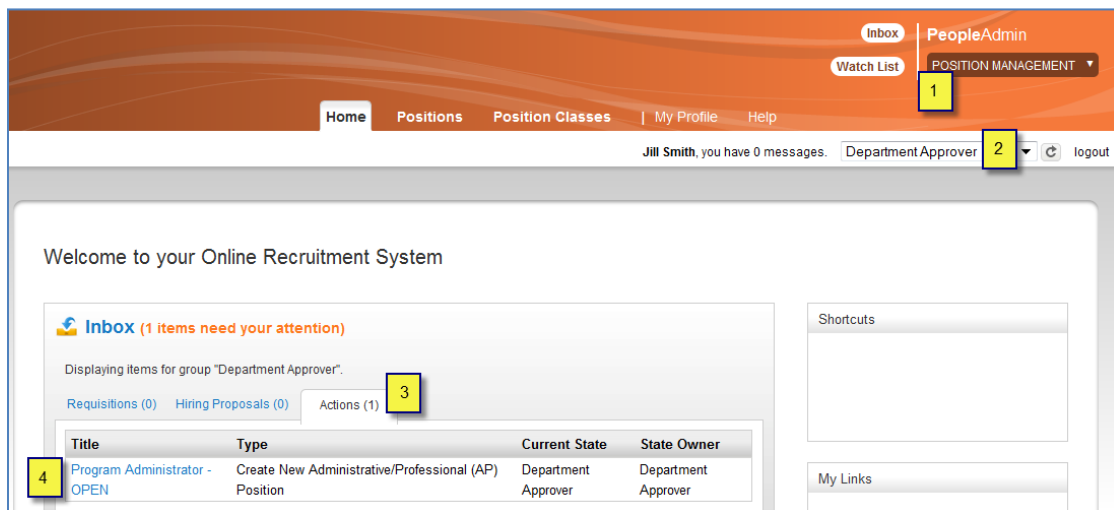
STAFF: Approve a Position Action – Department Approver, Executive, Budget

- 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.

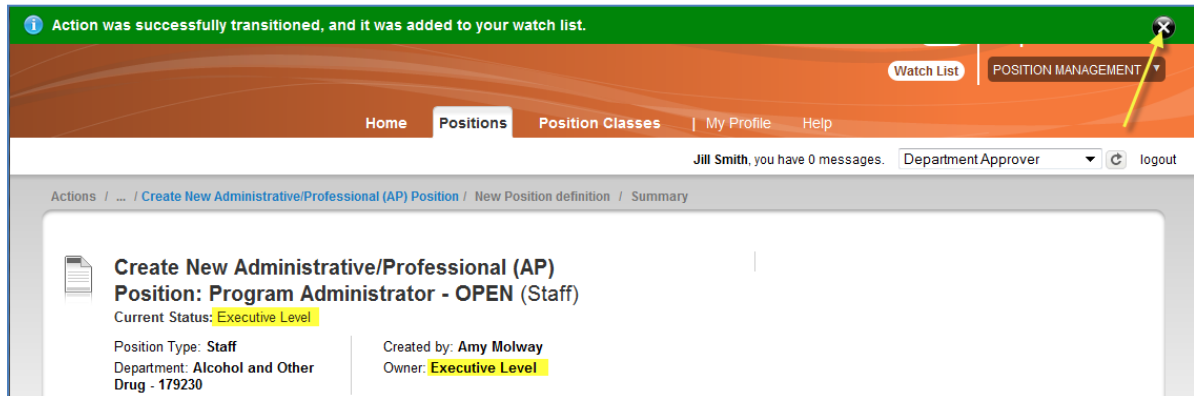
***You may add a note in the Take Action window and press Submit.**

The screenshot displays the PeopleAdmin web application 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 dropdown menu to the 'Take Action' modal window. The modal window is titled 'Take Action' and shows the selected action: 'Send to Executive Level Approver (move to Executive Level)'. It includes a 'Comments (optional)' text area with the text 'Thank You' and a checkbox labeled 'Add this action to your watch list?'. The modal window has 'Submit' and 'Cancel' buttons at the bottom. A yellow arrow points to the 'Submit' button.

The next page shows the results of your submission:

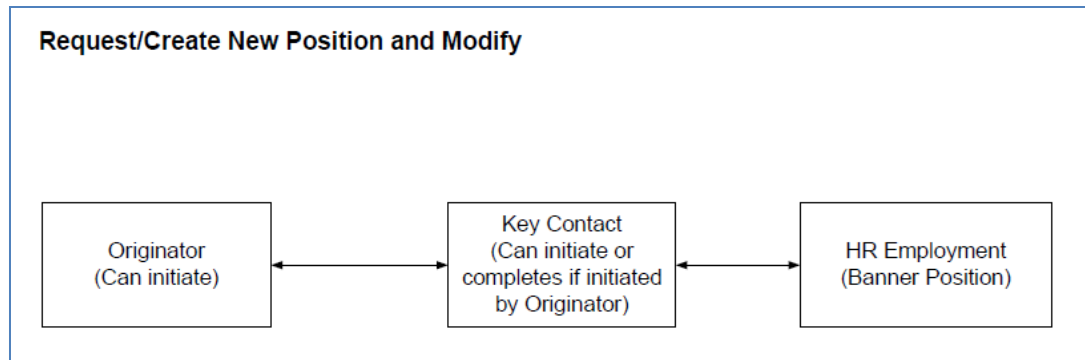
A green bar with the 'success' message appears next (press the x icon  to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.

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



FACULTY: Approve a Position

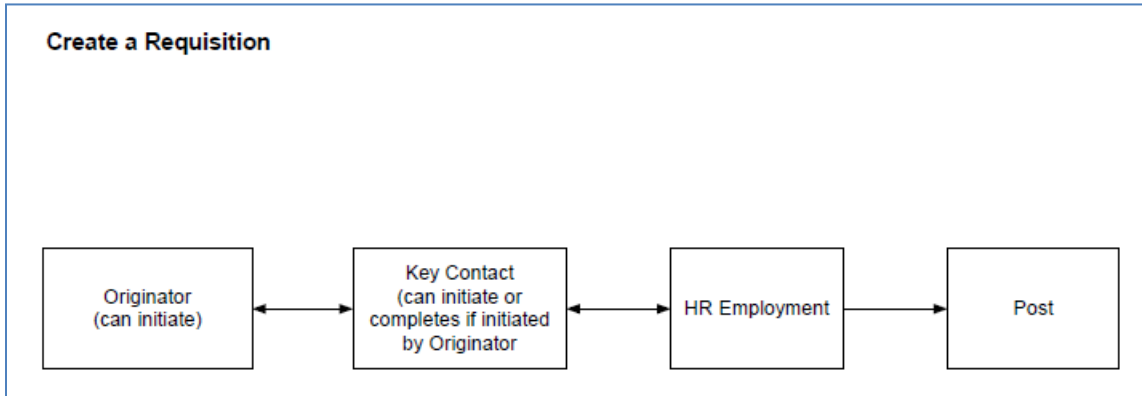
The Position Management Activity Form (PMA) has been replaced with an online form found in PeopleAdmin. Faculty positions will be 'approved' by HRM and the Requisition will have the former PMA and or Provost approvals.



Requisitions and Postings

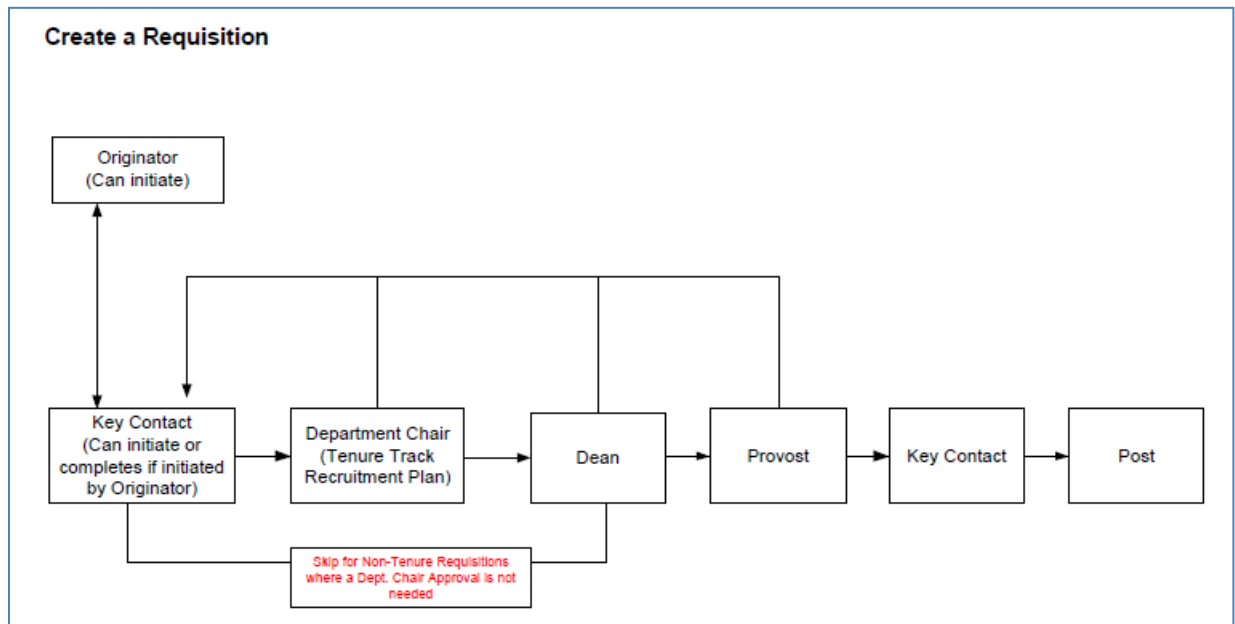
STAFF: Approve a Posting

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.

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

Home Requisitions Hiring Proposals My Profile Help

Jill Smith, you have 0 messages. Department Chair logout

Requisitions / Full-Time Faculty / Professor - Chemical Engineering (Department Chair) / Summary

Requisition: Professor - Chemical Engineering (Full-Time Faculty) [Edit](#) 6

Current Status: Department Chair

Position Type: Full-Time Faculty Created by: Jill Smith
Department: Chemical Engineering - 123000 Owner: Department Chair

Take Action On Requisition

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

Summary History Settings Applicants Reports Hiring Proposals

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Name** in the **Summary Section**. This will take you directly to the **Posting Page to Edit**. If a section has an orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the workflow.

Posting Details [Edit](#) 6

NU Posting Detail Information

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.

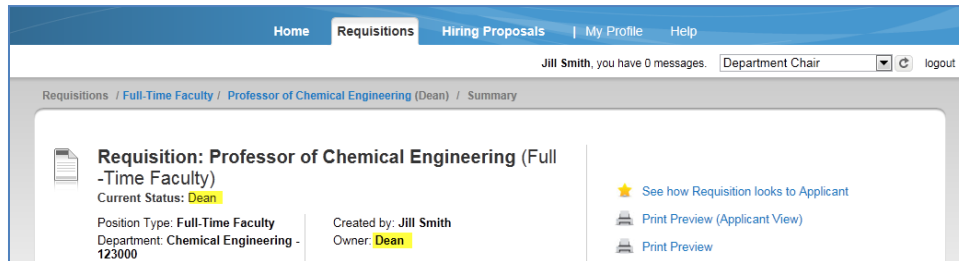
11. The Take Action window appears next.

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.

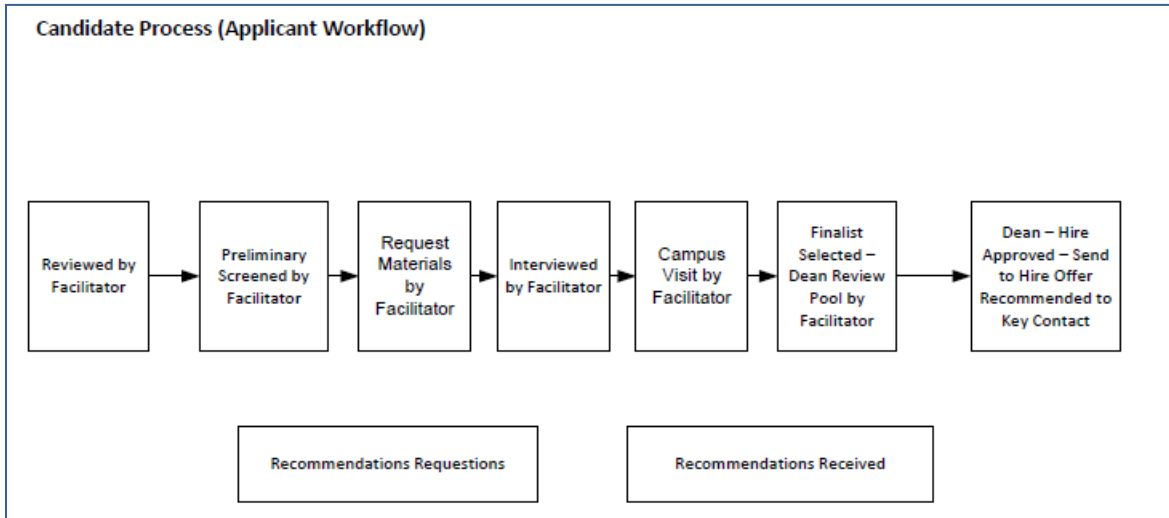
12. The next page shows the results of your submission:

- 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 web application interface. At the top, the 'APPLICANT TRACKING' dropdown is highlighted with a yellow box and the number 1. Below the navigation bar, the role 'Dean' is selected in the dropdown, highlighted with a yellow box and the number 2. The 'Requisitions' menu is open, and 'Full-Time Faculty' is selected, highlighted with a yellow box and the number 3. The search bar contains the text 'Professor & Chair', highlighted with a yellow box and the number 4. The search results table shows three requisitions. The first requisition, 'FTFR000011', has the title 'Professor & Chair' highlighted with a yellow box and the number 5. The table columns include Requisition Number, Posting Title, Tenure Status, Division/College (Posting), Requisition Facilitator, Workflow State, Active Applications, Created Date, and (Actions).

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

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	FTFR000020	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

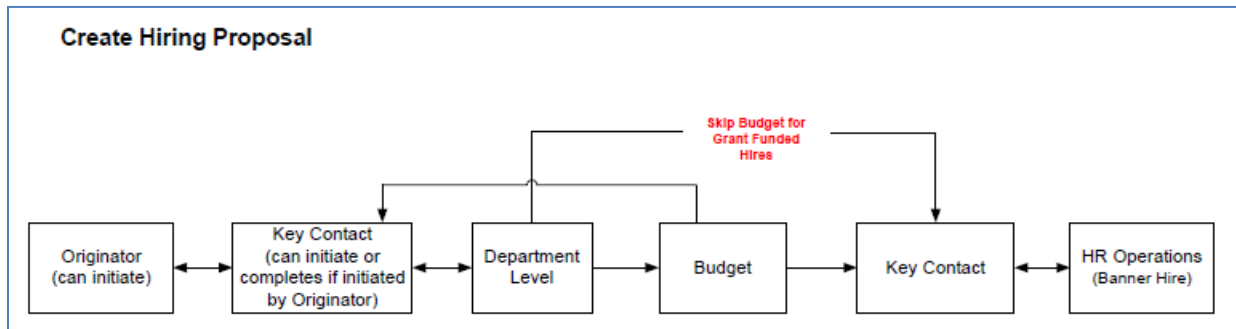
Job application: Tom Brady (Full-Time Faculty)
 Current Status: Dean Review Pool
 Application form: Faculty Application
 Full name: Tom Brady
 Address:

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)

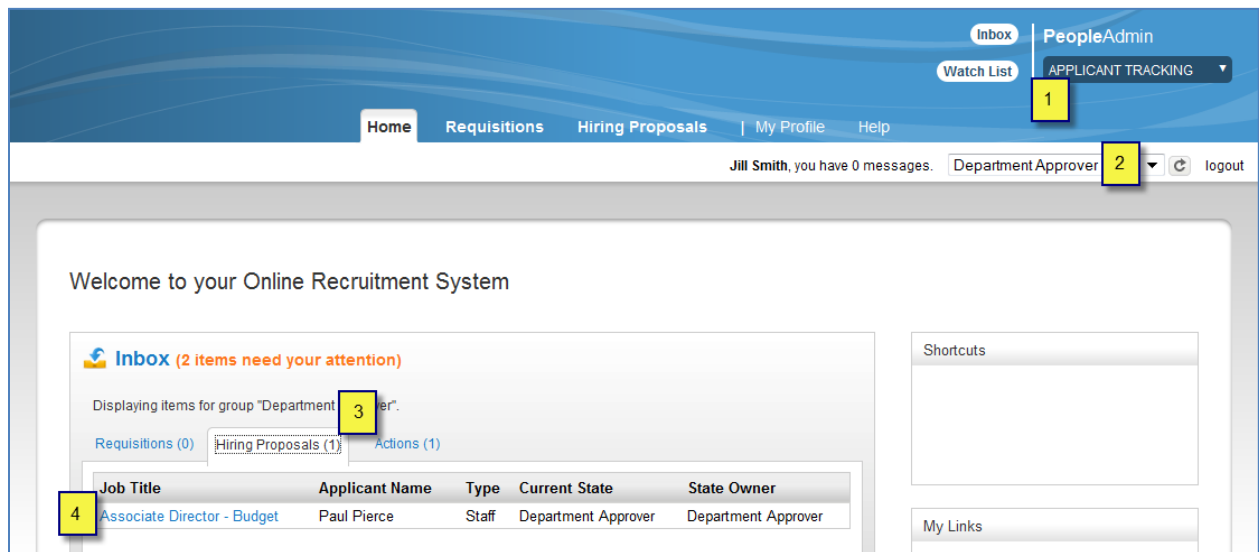
Hiring Employees

STAFF: Approve a Hiring Proposal – Budget, Department Approver

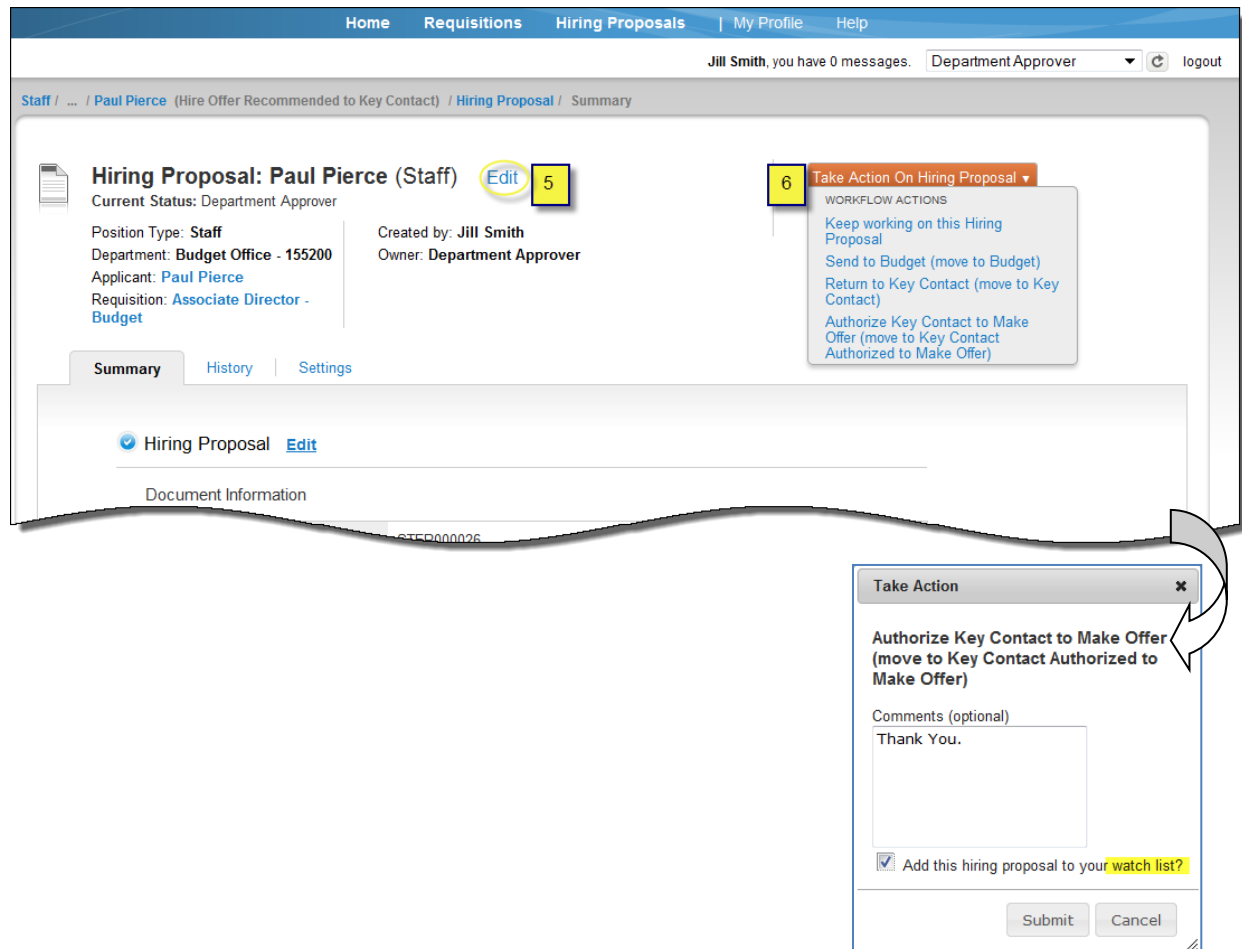


Steps to Approve a Staff Hiring Proposal

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.

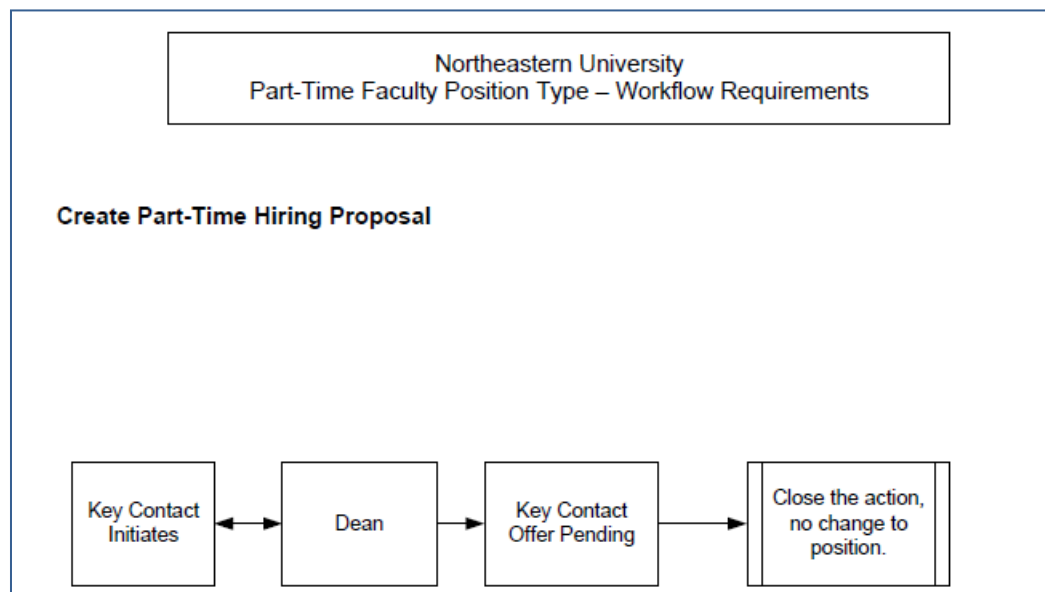
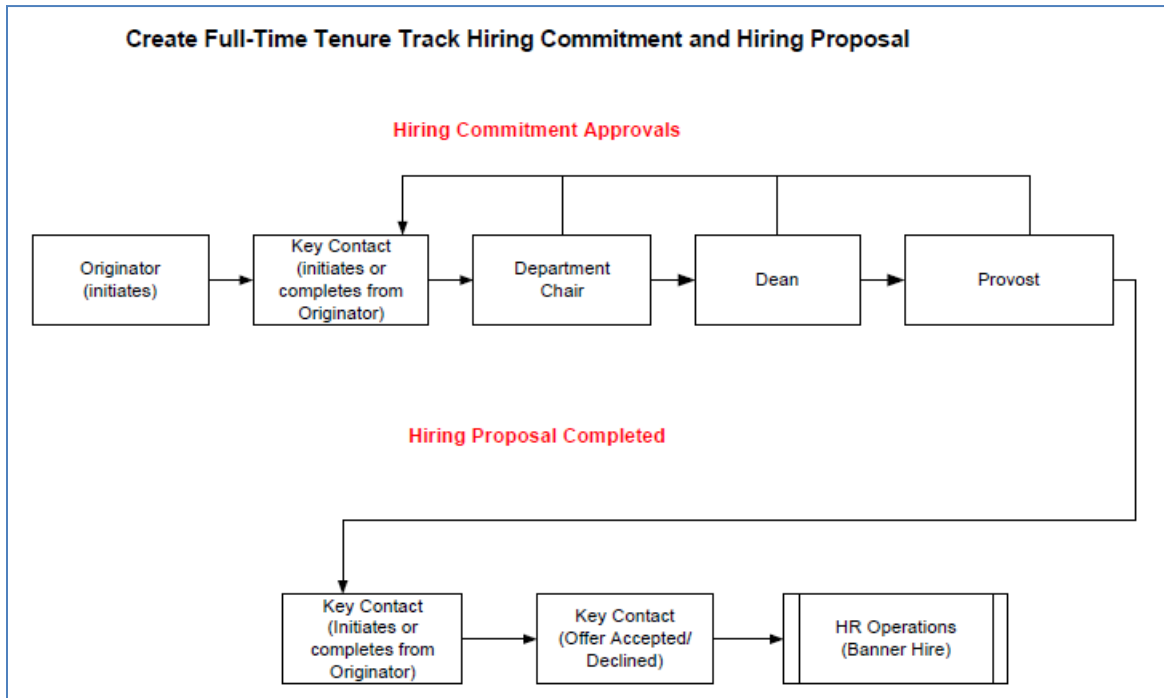


5. Press Edit anywhere in the page to make an edit to the Hiring Proposal.
6. To take action, Press Take Action on Hiring Proposal. The Take Action selection will move this Requisition to one of the Posting options:
 - Keep working on this Hiring Proposal: The saves the form and allows you to go back 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.

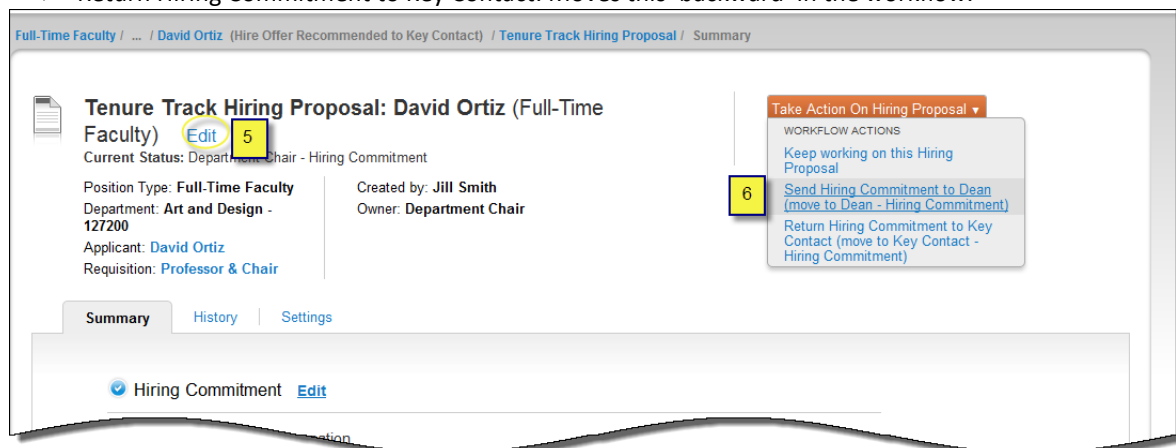


Steps to Approve a Faculty Hiring Commitment

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'

