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

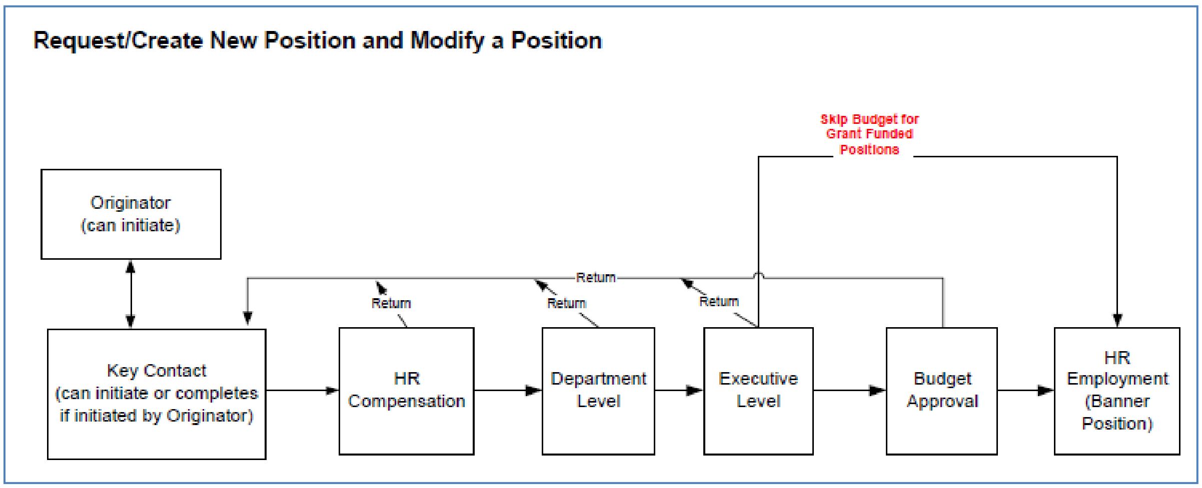
1. **Product Module** – Press this button to switch between Position Management and Applicant Tracking. When you are in the Position Management Module, the header will be orange; and in the Applicant Tracking module, the header will be blue.
2. **Role Selector** – Use the drop down to change your role. 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

Position Management

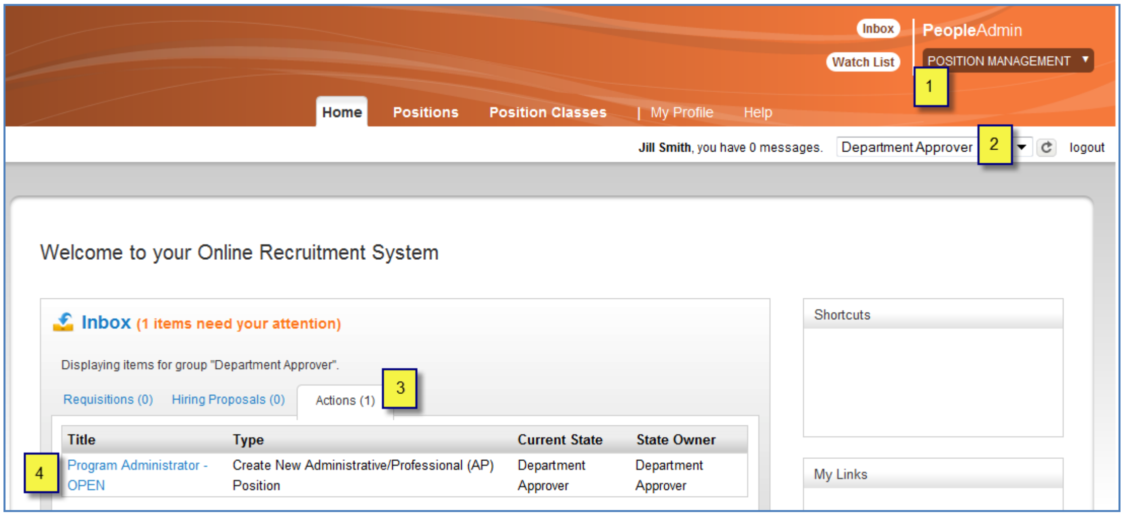
STAFF: Approve a Position Action – Department Approver, Executive, Budget

- 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.

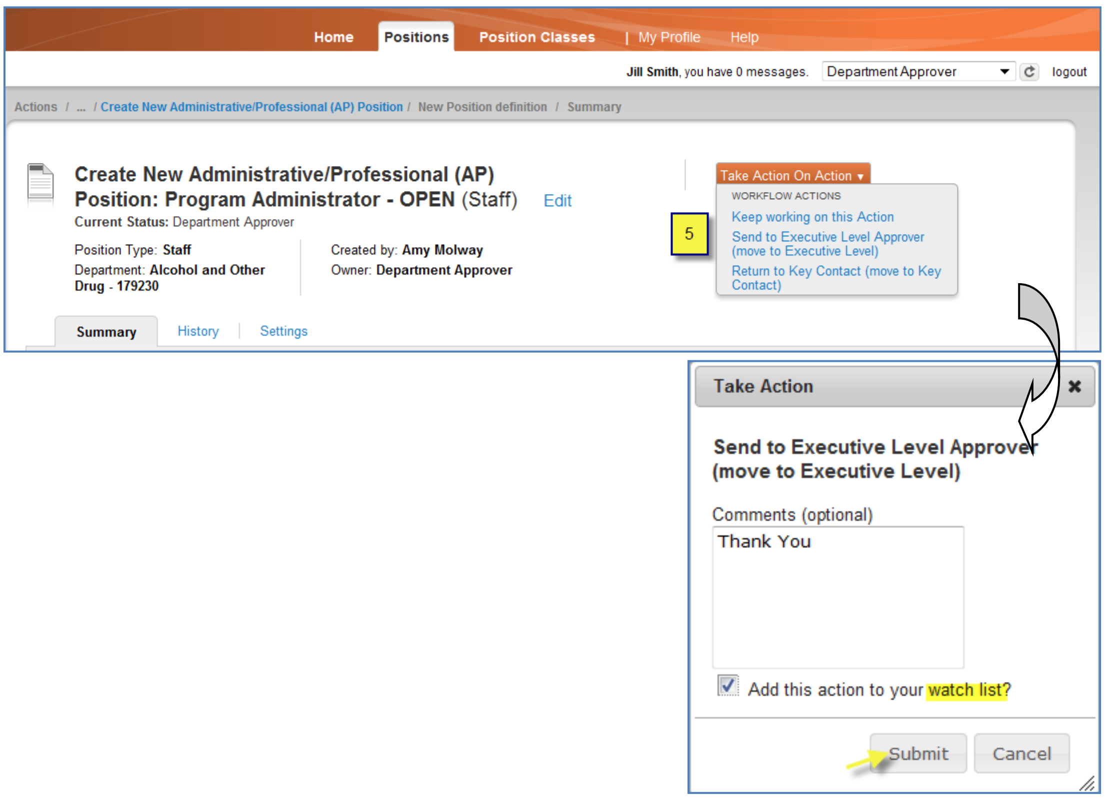


On the next page you can view the attributes of the Position

- ✓ 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.

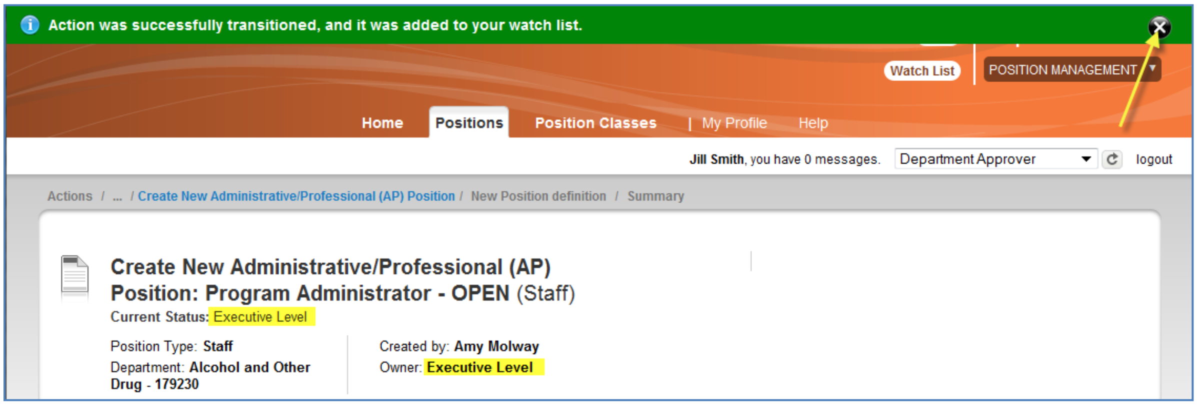
***You may add a note in the Take Action window and press Submit.**



The next page shows the results of your submission:

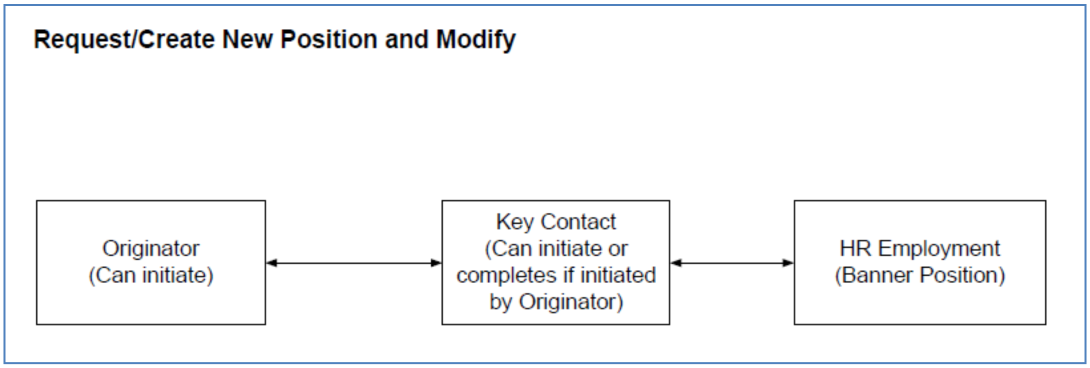
A green bar with the 'success' message appears next (press the x icon  to close the green bar). If this bar is red you will see an error message, typically indicative of a missed required field. You can go back in and edit the form and re-submit.

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



FACULTY: Approve a Position

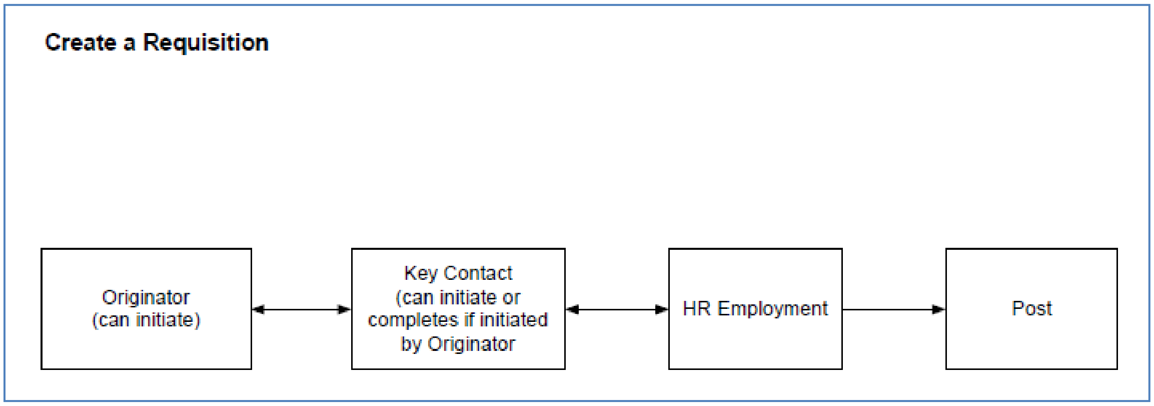
The Position Management Activity Form (PMA) has been replaced with an online form found in PeopleAdmin. Faculty positions will be 'approved' by HRM and the Requisition will have the former PMA and or Provost approvals.



Requisitions and Postings

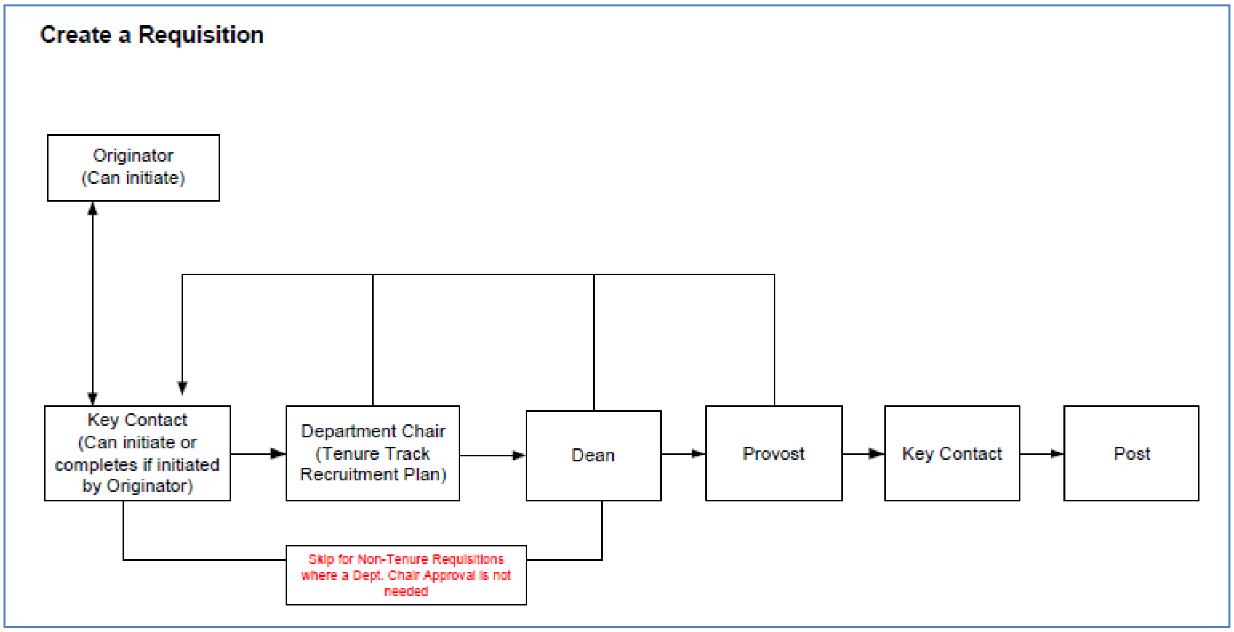
STAFF: Approve a Posting

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



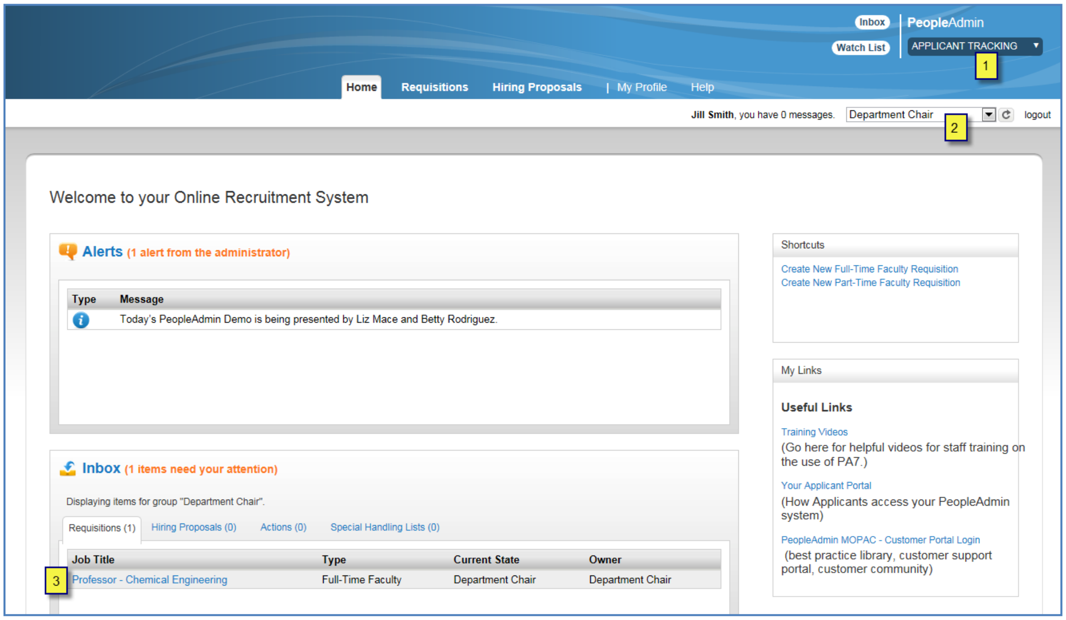
FACULTY: Approve a Requisition and Recruitment Plan – Department Chair, Dean, Provost

- 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).

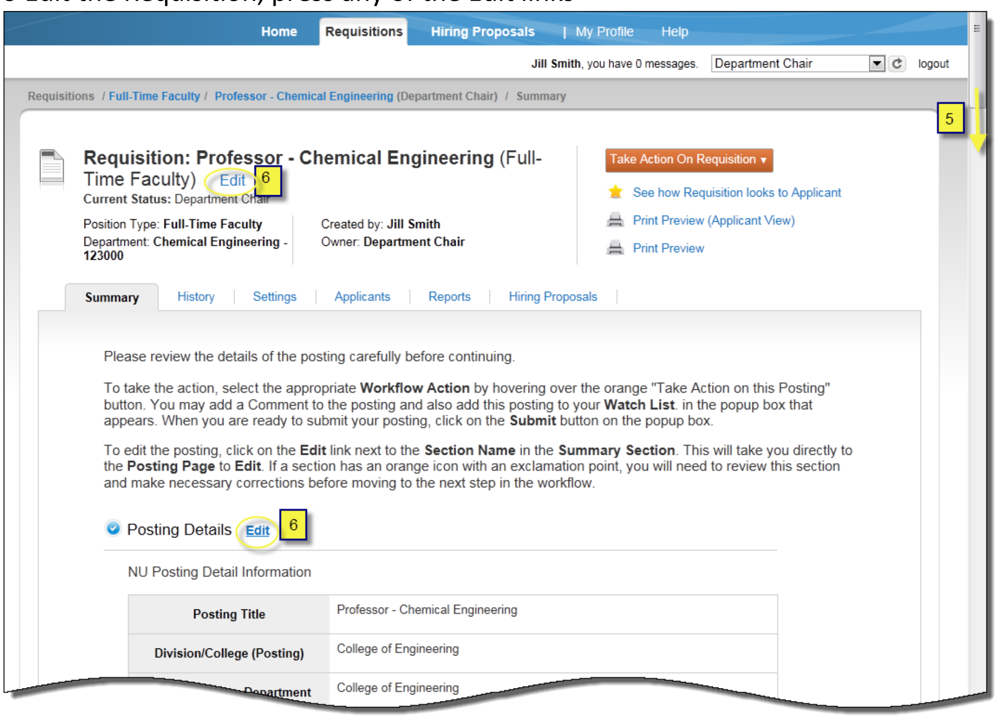


Steps to Approve a Faculty Posting

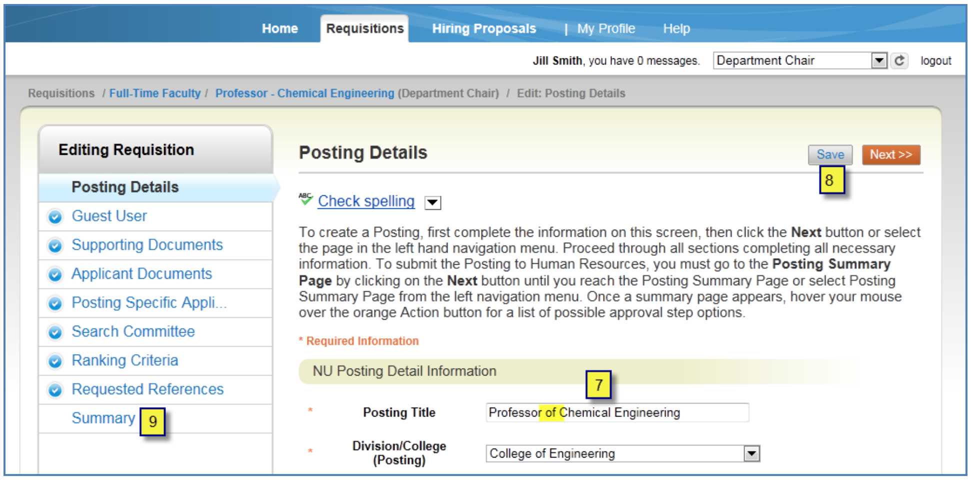
1. Go to Applicant Tracking Module
2. Change role (i.e., to Department Chair)
3. From the Home page, go to the Inbox and click on the Requisition Title.



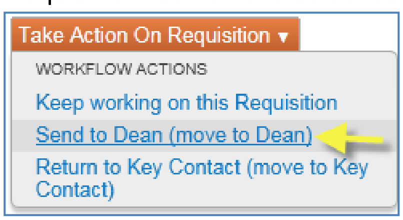
4. The Summary page appears next.
   - Tabs on this page:
     - History – This displays all the historical transaction (and comments) of the Requisition, as it moves through the Workflow.
     - Settings – This is where you can view the Organization fields
     - Applicants – Those who apply to this 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



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.



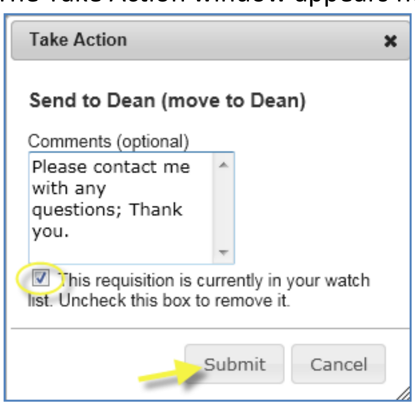
10. To Approve this Requisition (move it forward in the workflow) press the 'Take Action on Requisition' button and select Send to Dean.



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.



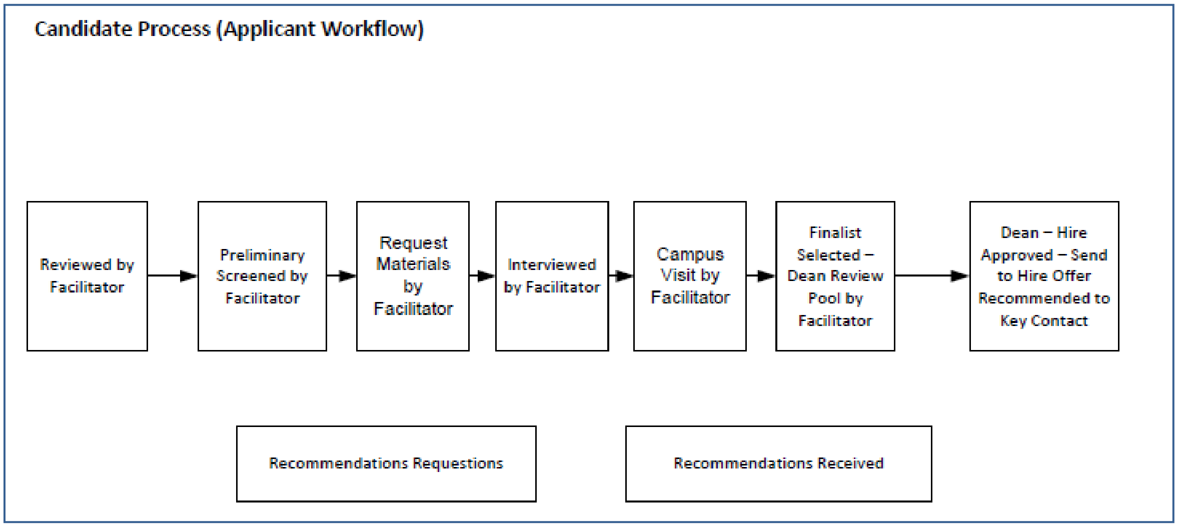
The Take Action window:

- 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.

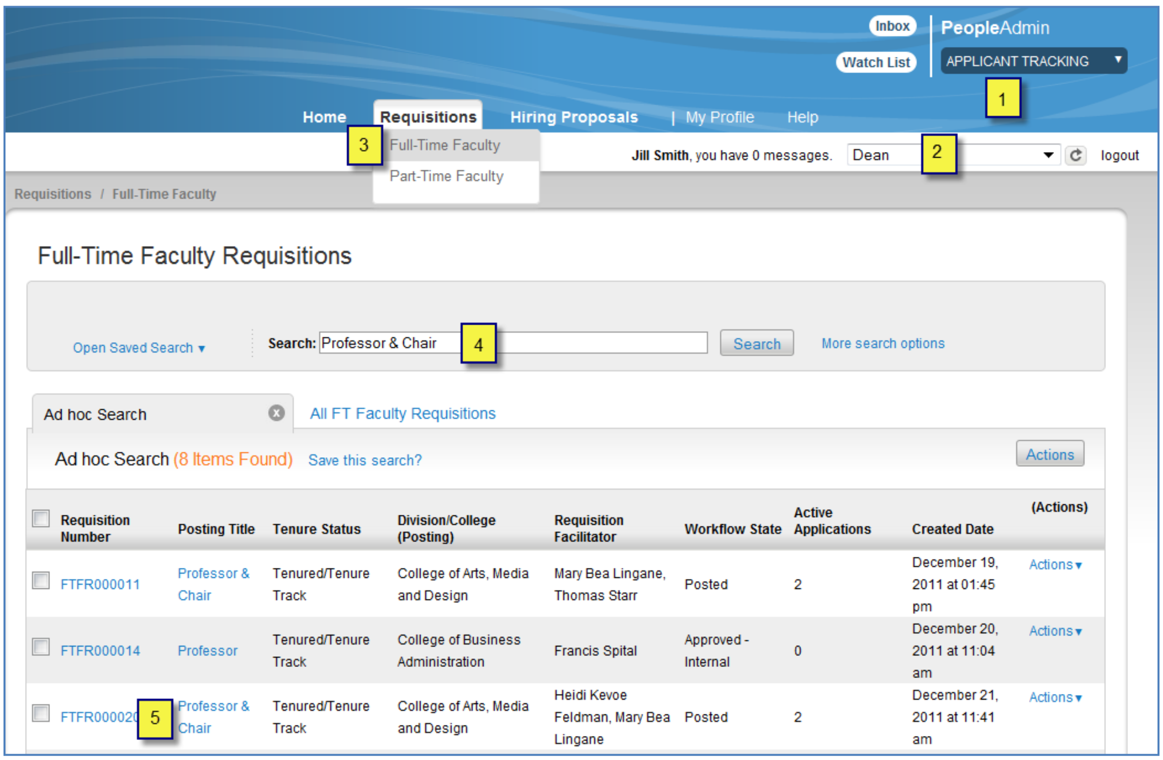
Managing Applicant Pools

FACULTY: Approve an Applicant Pool – Dean

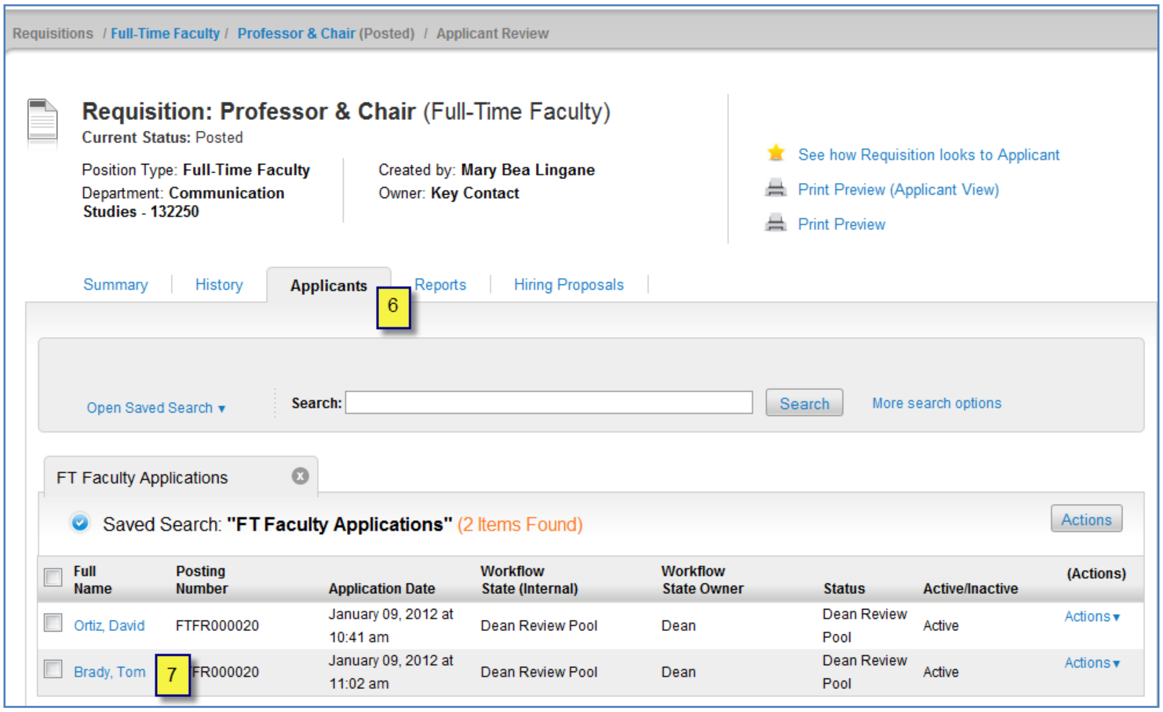


Steps to Approve a Finalist Candidate – Dean (Dean Review Pool)

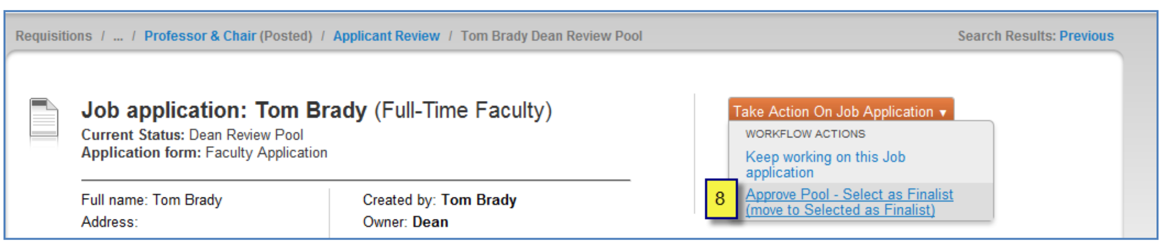
1. Select the Product Module of Applicant Tracking
2. Select your Role (Dean)
3. Go To Requisitions > Full-Time Faculty
4. Search for the Requisition
5. Click on the Title



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

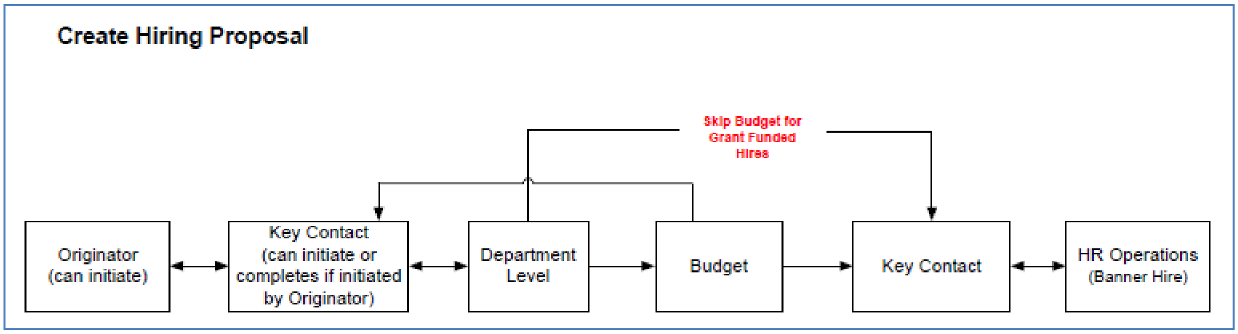


8. To move the candidate 'forward' in the Workflow, select the Take Action on Job Application button and click on Approve Pool – Select as Finalist.



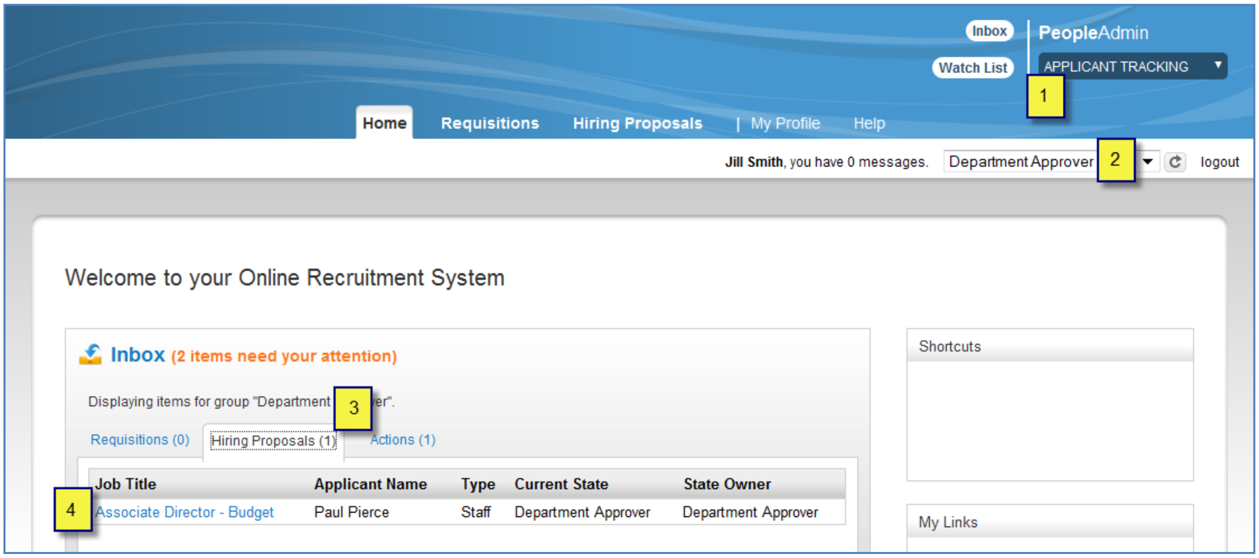
Hiring Employees

STAFF: Approve a Hiring Proposal – Budget, Department Approver

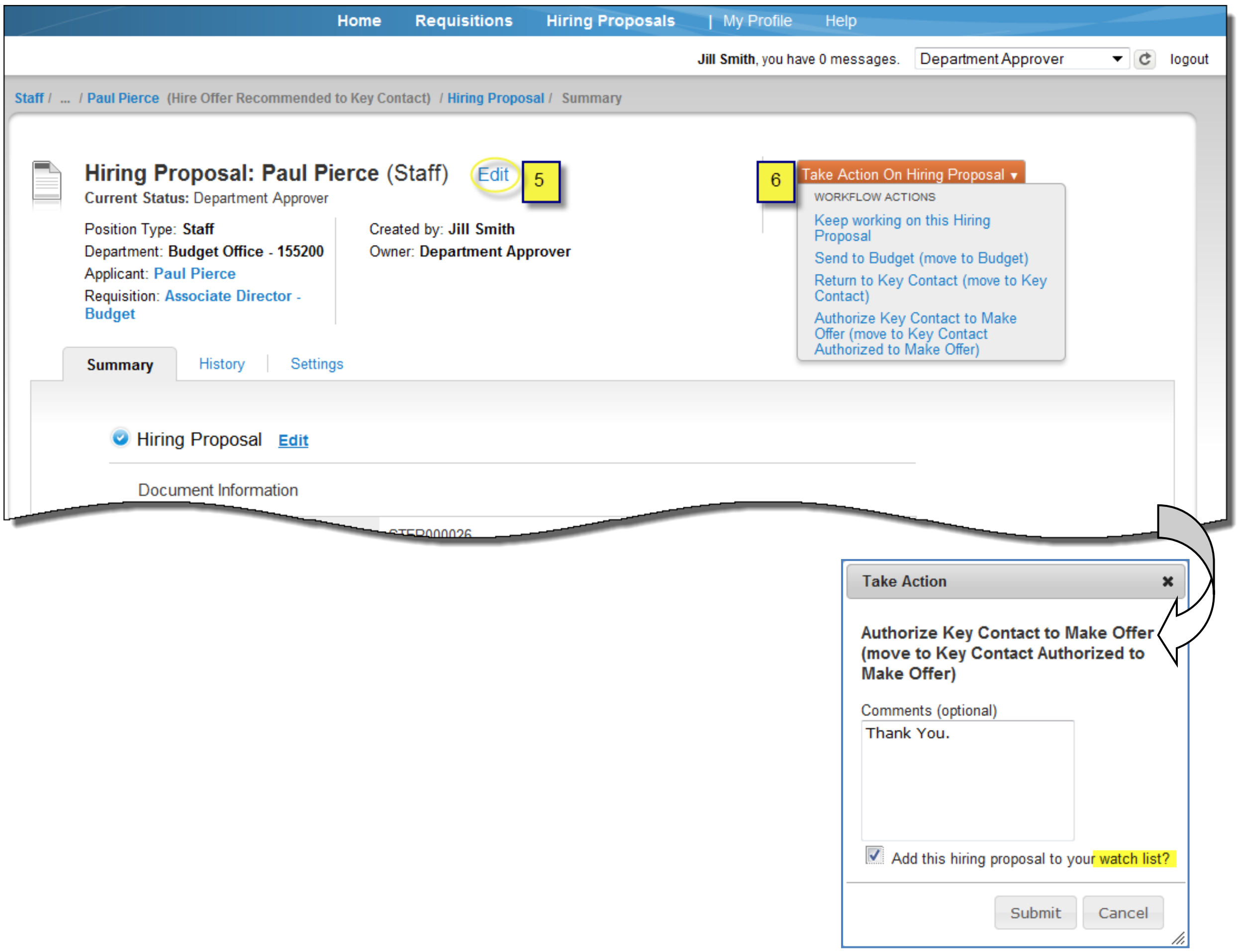


Steps to Approve a Staff Hiring Proposal

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.

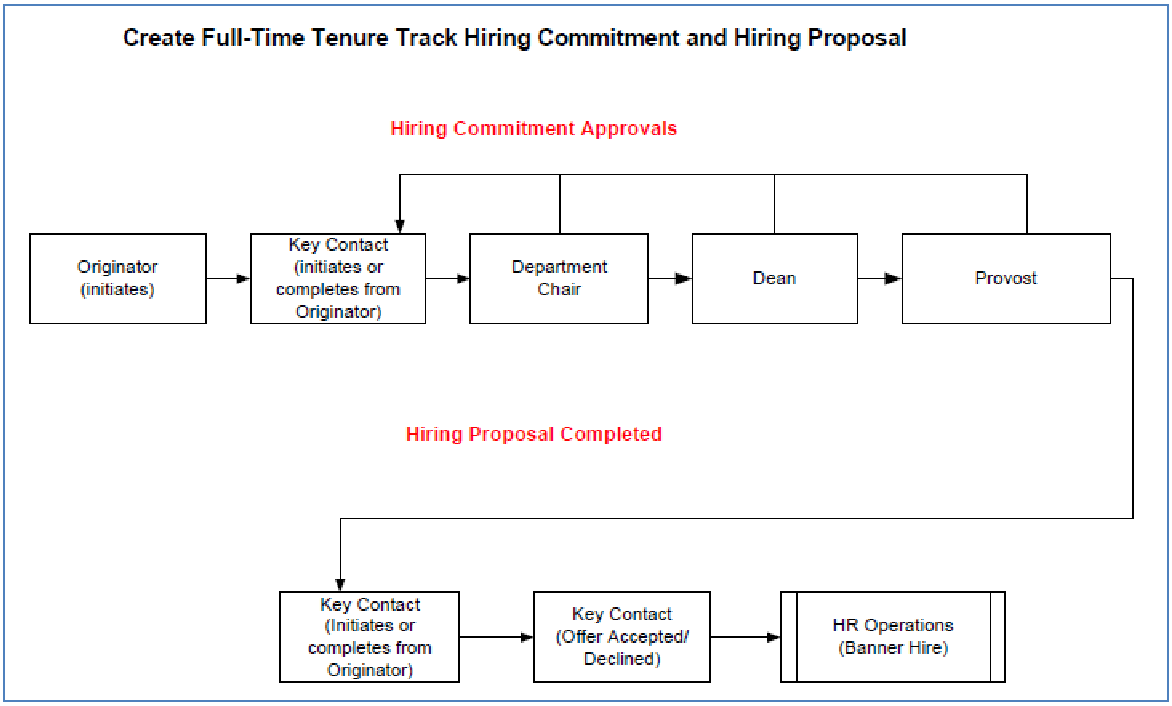


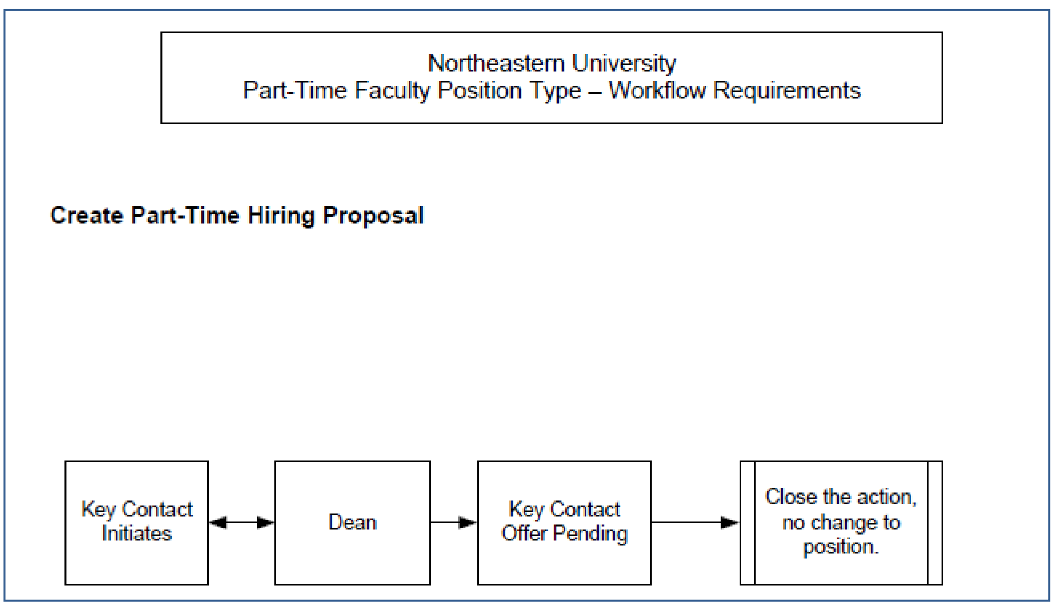
5. Press Edit anywhere in the page to make an edit to the Hiring Proposal.
6. To take action, Press Take Action on Hiring Proposal. The Take Action selection will move this Requisition to one of the Posting options:
   - Keep working on this Hiring Proposal: The saves the form and allows you to go back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

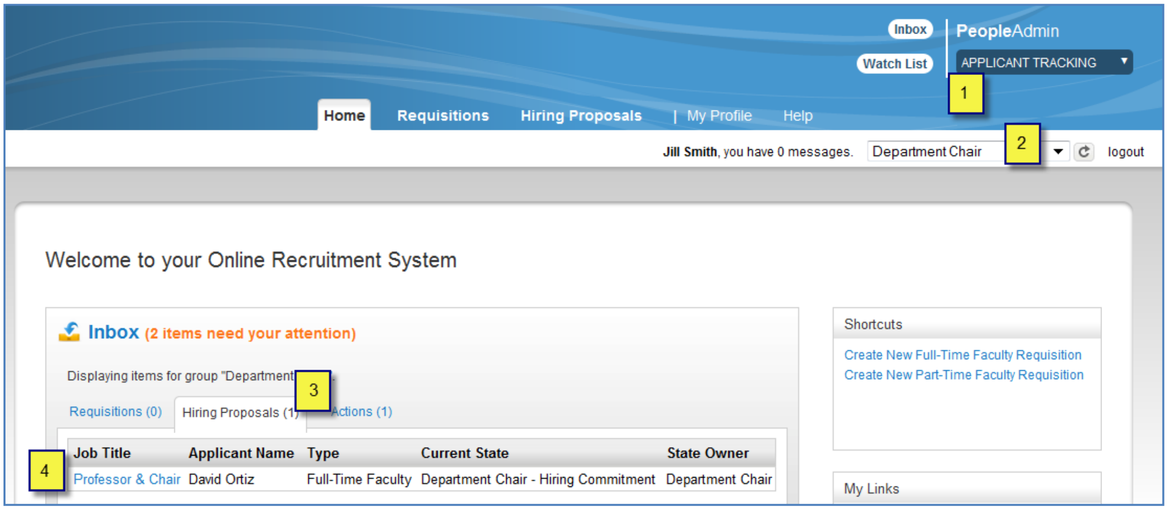
This process can begin when the Dean has approved the pool, and has forwarded the finalist to the Key Contact.



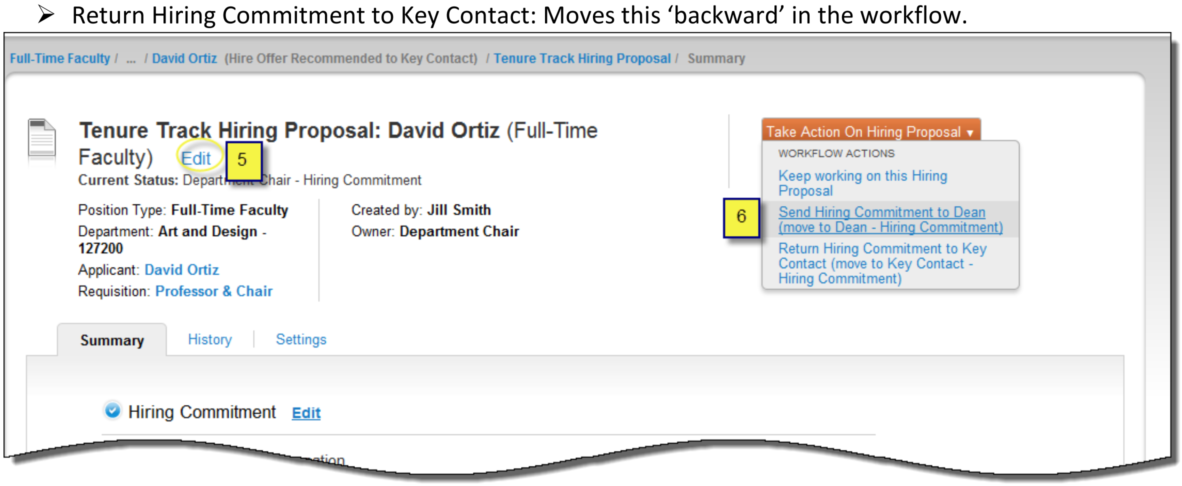


Steps to Approve a Faculty Hiring Commitment

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'