PEOPLEADMIN QUICK TIPS

GENERAL

1. PeopleAdmin documentation can be found on the HRM website.
    a. Under Banner HR & PeopleAdmin > http://www.northeastern.edu/hrm/bannerhr-pa/index.html.
    b. Under Resources & Forms > Employment Resources & Forms > Recruitment and Outreach > http://www.northeastern.edu/hrm/resources/employment-resources/index.html.
2. Familiarize yourself with the PeopleAdmin workflows.
    a. They can be found in the End User Guide (see page 6, 25, 29, 38, 57, 80, 81, 91, 92, 93, 101 and 110).
    b. They can also be found using the links above.
3. Banner position numbers need to be used on all forms.
4. If you are creating a new position, it means you are adding headcount. Otherwise, you should be modifying the position.
5. At the end of every transaction, review the summary to make sure you have blue check marks at every section. If you have any orange exclamation points, it means you missed a required field and you need to edit that section.
6. The History tab is a great place to review the "history" of a transaction (see page 15, 51 and 94).
7. If funding information is missing from a new position, the action will be returned to the Key Contact.
8. Requisitions will not automatically come down from the website when a candidate is in the workflow state of "Hire Offer Recommended to the Key Contact."
    a. Consider using the "close date" field on the requisition. Remember that a posting must be up for a minimum of 30 days, unless you received a waiver.
    b. HR Employment will remove postings from staff.
    c. Key Contacts will remove posting for faculty (see page 79).
9. If you wanted to see which position an Originator used to create a requisition, check the Associated Position tab (see page 54 and 77).
10. Any changes to text on a requisition should be initiated in PeopleAdmin and not directly with Job Elephant.
    a. Contact HR Employment for staff postings
    b. Key contacts responsible for faculty postings.
11. In order to make an Applicant Document "required" on a posting, you must check off the "Included" and "Required" boxes next to the document type (see page 45).
12. Originators can send the hiring proposals to HR Operations even though the workflow state says "Key Contact."

STAFF PROCESS

Positions

1. You will need your Position Action# when you create a requisition, not the Banner position#.
    a. Will be auto-assigned when you start a Position Action (see page 11).
    b. Will be in the email you receive.
    c. Will be listed in the default search under Staff Actions.
2. When modifying a position use the “Type of Change” field and the “Reason for request” field to let HR Compensation know what you are doing.
    a. For example, if you are inputting the job description, but will also be posting the position, select “Load existing position description without changes” in the “Type of Change” field and indicate “Replacement for John Smith” in the “Reason for request” field. HR Compensation will make sure that the modify action goes through all the approvals.
3. The “Approval to Post Existing…” modify action does not allow for edits.
    a. If we had a fully populated job description library this action would be used when replacing a staff member.
    b. You should use the appropriate “Modify” action to process replacement (see #2 above)
4. The “Create New Other” position type should be used for research positions, crafts and trades and service positions.
    a. Research scientist family templates are on the HRM website and there is a link in PeopleAdmin to these templates: http://www.northeastern.edu/hrm/resources/compensation-resources/index.html
        i. Post Doctoral Research Associate
        ii. Associate Research Scientist/Engineer
        iii. Senior Research Scientist/Engineer
        iv. Principal Research Scientist/Engineer
5. The Department Approver should send grant funded positions directly to HR Employment.

Requisitions

1. The “Special Offline Applicant Instructions” field should only be used if you are unchecking the “Accept Online Applications” box.
    a. Applicants will not be able to apply online, but will see your instructions on how to apply on the posting.
2. The Requisition Facilitator is the person who will be managing the applicant pool.
    a. You can have multiple facilitators, but each person will be able to change the workflow state for an applicant. This could be problematic if someone “rejects” an applicant prior to the other facilitators reviewing the applicant’s materials.
3. Search Committee Members can view the applicant pool and rank applicants (if ranking criteria is added to the requisition).

   a. Search Committee Members will **not** be able to view the applicant pool when applicants are in the "Facilitator Only Review" workflow state (see page 83).
   b. The minimum and maximum salary range is not available to this group.
4. The "hours per day" and "hours per week" fields need to match when creating a requisition.
   a. If "hours per day" is 7 and the position is 40 hours, you need to modify the position and change the Position class.
      i. Scroll down and "filter the search results" and find the equivalent "A8" position class.
   b. Hours per week is no longer displayed on the posting.
5. When you "Create a Requisition from a Requisition" it copies all the information, including the original Associated Position.
   a. This should only be used for replacements.
6. When OIDE has approved the applicant pool you will receive an email with the subject "Candidate Recommended for Hire."
   a. This will not appear in your PeopleAdmin Inbox.
   b. You will need to locate the applicant on the requisition and "Start the Hiring Proposal" (see page 94).
7. When OIDE rejects the applicant pool you will receive an email with the subject "OIDE Requires Additonal Information."
   a. Contact OIDE directly.
8. For Office Support/Technical positions, facilitators should identify those applicants who have been interviewed and HR Employment will complete the rest of the process.

FACULTY PROCESS

Requisitions

1. If the search committee would like to receive faculty recommendations from referees electronically, you must check off the "Accept References" box when creating the requisition.
    a. Fields are explained on page 60 and screen shot on page 61.
        i. You must select the Document Type, otherwise, the referee cannot upload a document.
    b. You must also complete the Requested References section (see page 74).
    c. Do not select "Letters of Recommendation" or "References" as an Applicant Document.
        i. This appears on the Posting as a required or optional document for the applicant to attach.
2. The Department Chair Approver field should be used to indicate the name of the person you want notified to complete the recruitment plan for tenure track faculty positions.
3. The Dean will receive an email when an applicant has been moved to the workflow state 'Selected as Finalist – Dean Review Pool."
    a. There are instructions in the Approver's Guide which direct the Dean on how to review the Departmental EEO report, which displays the diversity of the entire applicant pool.

Hiring Proposals

1. The Full Time Tenure Track Hiring Commitment and Hiring Proposal is a two-step process.
    a. Review pages 101 – 109 for clarification.