

# ECU Human Resources 2018 Talent Management Conference Featuring



**PEOPLEADMIN**

# Applicant Tracking

## Security, Integrations, & Data Best Practices

Dan Blumberg  
Director, HR Information Systems



# Security Overview: Applicant Tracking (ATS)

The screenshot shows the PeopleAdmin interface. At the top right, there are buttons for 'Inbox' and 'Watch List'. Below these, the user is identified as 'PeopleAdmin' with a dropdown menu currently set to 'APPLICANT TRACKING'. Below the dropdown, there are links to 'Go to East Carolina University' and 'Employee Portal'. On the left side, a message notification says 'Daniel Blumberg, you have 0 messages.' Below this, a dropdown menu is open, listing various user roles: 'Level 1 Approver', 'Applicant Reviewer' (which is highlighted in blue), 'Employee', 'HR Class and Comp', 'HR Employee Relations', 'HR Employment', 'Human Resources Admin', 'Integrations', 'Level 1 Approver', 'Search Committee Member', and 'Temp/Student/PostDoc/Non PD EHRA Initiator'. To the right of the dropdown menu, there is a 'logout' link.

- Based on user types *and* organization codes
- Will limit who you can see and what you can do
- Don't forget which "hat" you are wearing if you wear more than one!

# PeopleAdmin - Security



PeopleAdmin is ECU's talent management system. Users who require assistance with their account, such as security access and permissions, should contact the PeopleAdmin Helpdesk.

### Requestor \*

This is an individual that is listed as the person asking for service detailed within the ticket. If used as a filter in a report, the filter allows for a lookup search.

Daniel Blumberg

### Employee Name

### Supervisor Email (for approval)

### User Type

- Applicant Reviewer – Access for reviewing applicants
- Level 1 Approver – Departmental level access to position management and applicant tracking modules for SHRA/CSS/EHRA-F/EHRA-NF positions
- Level 2 Approver – Division Level access to position management and applicant tracking modules for SHRA/CSS/EHRA-F/EHRA-NF positions
- Temp/Student/Post Doc/Non PD EHRA Initiator – Access to applicant tracking modules for these position types

- Applicant Reviewer
- Level 1 Approver
- Level 2 Approver
- Temp/Student/Post Doc/Non PD EHRA Initiator
- Other - Please specify in 'Description'



- Request PeopleAdmin Security through Team Dynamix Ticket
- Requires Supervisor Approval
- HR completes and notifies when complete

## User Type

Applicant Reviewer – Access for reviewing applicants

Level 1 Approver – Departmental level access to position management and applicant tracking modules for SHRA/CSS/EHRA-F/EHRA-NF positions

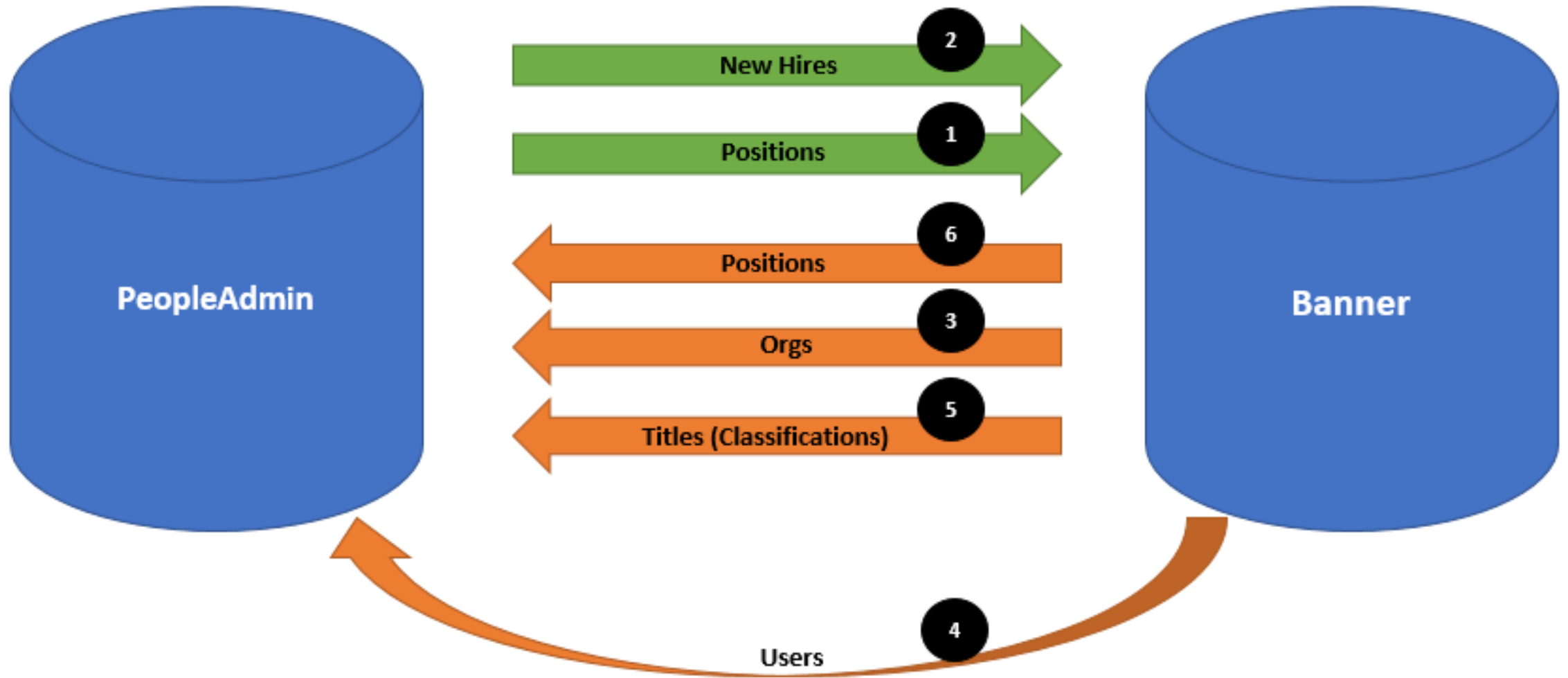
Level 2 Approver – Division Level access to position management and applicant tracking modules for SHRA/CSS/EHRA-F/EHRA-NF positions

Temp/Student/Post Doc/Non PD EHRA Initiator – Access to applicant tracking modules for these position types

- Applicant Reviewer
- Level 1 Approver
- Level 2 Approver
- Temp/Student/Post Doc/Non PD EHRA Initiator
- Other - Please specify in 'Description'

- 
- Search Committee / Applicant Reviewer require additional verification
  - Level 1 and Temp/Student/Post Doc/Non PD EHRA Initiator most common
  - Provide Orgs for each User Type

# PeopleAdmin Integrations Overview



# Integrations: What Data Feeds ATS?

✔ User Details [Edit](#)

Account Information

<b>Username</b>	blumbergd14
<b>External Authentication Key</b>	blumbergd14@ecu.edu
<b>First Name</b>	Daniel
<b>Middle Name</b>	Evan
<b>Last Name</b>	Blumberg
<b>Email</b>	blumbergd14@ecu.edu
<b>Employee Org Unit</b>	East Carolina University
<b>Employee ID</b>	B01047138
<b>Base Job Begin Date</b>	02/02/2015
<b>Probationary?</b>	No
<b>Employee Type Description</b>	EHRA Non-Faculty
<b>Interim Required?</b>	No
<b>Employee Class</b>	E2 - SAAO IB FT
<b>Position Type</b>	EHRA Non-Faculty
<b>Reporting Org Unit</b>	AFH HR Information Systems
<b>Default Module</b>	Applicant Tracking
<b>Password</b>	

- Daily user and org integrations have largest impact on ATS
- No errors in PeopleAdmin; if something is off, likely an error in Banner
- Be aware of what you change on EPAFs!



# Integrations: Hiring Proposal Export

Employee Class	SA - CSS FT Perm nonexempt 100
Leave Category	LM - CSS Standard
Home Department	665201 - HSH BSOM Family Medicine
Current Hire Date	10/30/2017
Position Number	961099
Classification Title	10422 Admin Support Specialist
Job Suffix	00
Job Begin Date	11/01/2017
Jobs Effective Date	11/01/2017
Jobs Personnel Date	10/30/2017
Job Employee Class Code	SA - CSS FT Perm nonexempt 100
Timesheet Org	HFMPA1 - FM Patient Access FMC

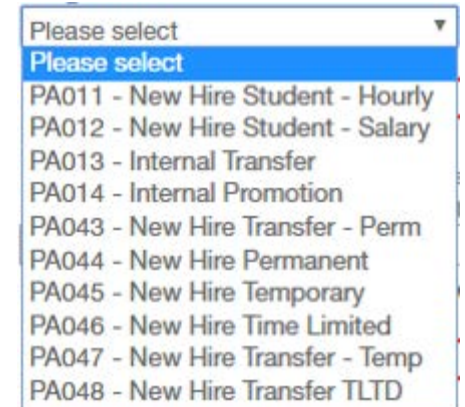
- Daily export of new hires from PeopleAdmin sent to Banner
- Triggered by a hiring proposal reaching it's final status (Hire Approved, Student Hire Approved, etc.)
- Replaces the new hire EPAF; no double data entry



# Integrations: Hiring Proposal Export

- Critical Data Points

- Job change reasons – used in integration crosswalk
- Effective dates – used in payroll and must conform to deadlines
- Timesheet orgs – where timesheet will show up in Kronos
- Budget builders – how salary dollars will be expensed in Banner



A screenshot of a dropdown menu with a white background and a blue header. The header contains the text "Please select" in white. Below the header, a list of job change reasons is displayed in black text. The options are: PA011 - New Hire Student - Hourly, PA012 - New Hire Student - Salary, PA013 - Internal Transfer, PA014 - Internal Promotion, PA043 - New Hire Transfer - Perm, PA044 - New Hire Permanent, PA045 - New Hire Temporary, PA046 - New Hire Time Limited, PA047 - New Hire Transfer - Temp, and PA048 - New Hire Transfer TLTD.

- Please use proper formatting

Position Number

9218030

This entry is too long (maximum is 6 characters).

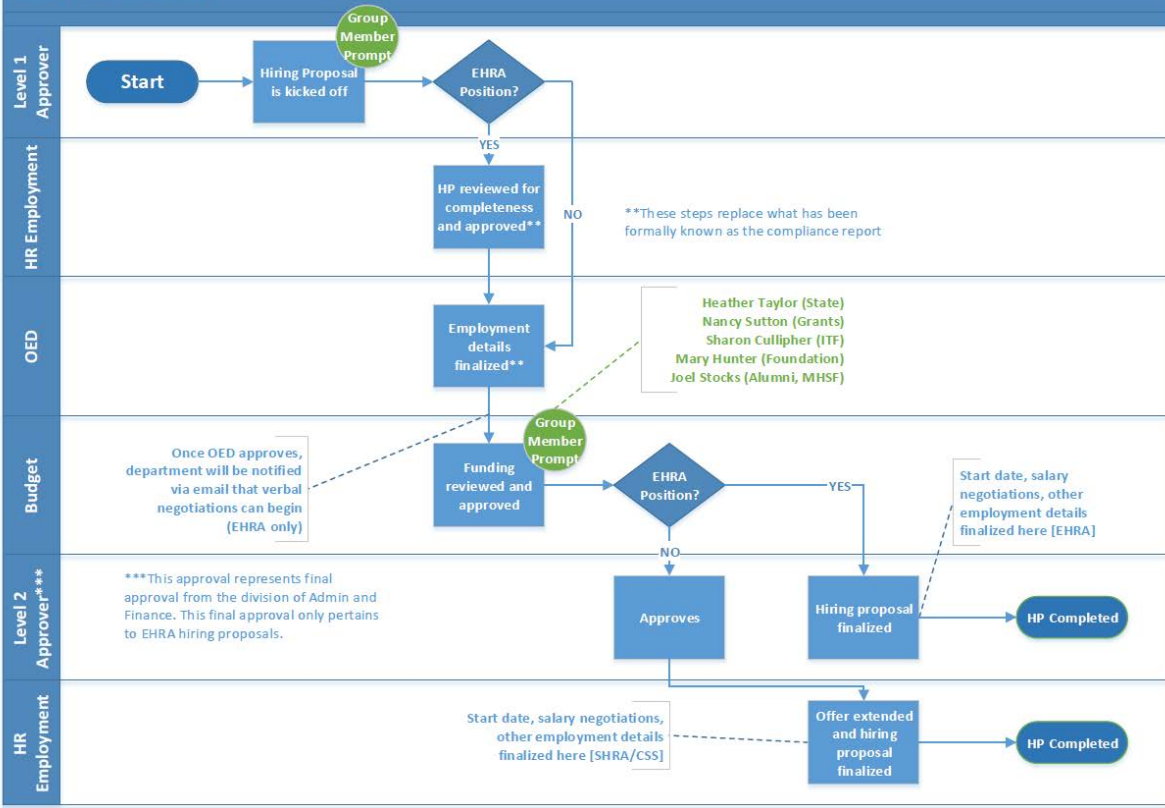
- If you don't know what something is, ask for help!

# Don't Forget the Flow Charts!

## PeopleAdmin Process Flow – Admin and Finance

November 9, 2017

### Hiring Proposal (HP)



## PeopleAdmin Budget Routing Hierarchy



The budget approval step in PeopleAdmin SelectSuite (PeopleAdmin 7) is a group member prompt, meaning that all budget users (regardless of funding source) share the same approval step. A position, posting, or hiring proposal can be routed to as many budget users as is necessary, but the order in which those should be routed is dictated by funding source. The system will not enforce the above hierarchy, so it is critical that budget users identify how a particular action is being funded and make sure that, within the budget approval step, all necessary offices see the action.

For example, if a hiring proposal comes through and the new employee's salary is being partially funded by a grant, by state funds, and by ECUP funds, then Grants will get the action first. Grants will then route it to State Funds, who will in turn route it to ECUP Funds for the final budget approval. ECUP Funds will then pass the action on to the next approval step in the workflow.

## Formatting Guidelines for Budget Data

### Effective Date

Labor Dist Effective Date: 09/07/2017

Labor Dist Effective Date: MM/DD/YYYY (or select from the calendar)

### Budget Details

Fund Code: 111170  
 Orgn Code: 22  
 Acct Code: 60100 - EPA Non Teaching Salaries  
 Prog Code: 0000  
 Activity Code:  
 Project Code (FTE): 1.0  
 Percent: 100  
 Location Code:

Fund Code: XXXXXX

Orgn Code: XXXXXX (can be fewer than 6 characters)

Acct Code: Please select from drop-down.

Activity Code: XXXXX (not required)

Project Code (FTE): X.XXX

Percent: XXX (integer value between 1 and 100; multiple budget entries should total to 100)

Location Code: Not currently in use.



# EPAF vs. Hiring Proposal: What's the Difference?

- In short, not all that much
- Serves the same business function; just a different, more flexible tool
- EPAFs are *not* being wholly replaced, some are just being retired
- Same deadlines, business rules, and operating procedures still apply
- Still ultimately applied to Banner by HRIS

# Data Best Practices

- Pretend hiring proposals are EPAFs; nearly all of the same rules apply
- Follow your division's business process (flow charts)
- Don't guess; if you're not sure, ask!
- Be proactive; if something looks off, don't procrastinate troubleshooting
- Dates matter!

# How Do I Request Help?

The screenshot shows the ECU Technology Service Management System interface. At the top left is the ECU logo and the text 'TECHNOLOGY SERVICE MANAGEMENT SYSTEM'. To the right is a search bar with the text 'Search the client portal' and a magnifying glass icon, and a user profile icon for 'Dan Blumberg'. Below this is a navigation menu with 'Home', 'Projects/Workspaces', 'Services' (highlighted), 'Knowledge Base', and 'News'. Underneath is a secondary menu with 'Project Requests', 'Ticket Requests', 'My Favorite', 'My Recent', 'My Approvals', 'Services A-Z', and 'Search'. A breadcrumb trail reads 'Service Catalog / Other Campus Services / Human Resources / PeopleAdmin - Employment'. The main heading is 'PeopleAdmin - Employment'. Below it is a paragraph: 'PeopleAdmin is ECU's talent management system. Users who require assistance with employment-related activities, such as a posting or a hiring proposal, should complete this form.' To the right of this text are three purple buttons: 'Request Service' (with a circular arrow icon), 'Share' (with a share icon), and 'Add to Favorites' (with a star icon).

- Team Dynamix ticket specific to Employment
- Help with hiring proposals, postings, or general hiring activity support
- Do not request security adjustments here; separate ticket for that
- Call HR @ 328-9847

Questions?