

PeopleSync Overview

PeopleSync is the system used to manage HR, Payroll, and Retirement Benefits for NYU. In this tip sheet, you will learn how to:

- Access PeopleSync
- Recognize and use the different landing pages
- View your PeopleSync Inbox
- Process a request
- Process a To-Do
- Utilize the PeopleSync search functionality
- Configure *the Workday* page
- Be more familiar with key PeopleSync terminology
- Conduct additional task(s) in PeopleSync (Hyperlinks)

How to Access PeopleSync

To access PeopleSync, follow the directions below:

- Log into the **NYU Home** (home.nyu.edu) with your NetID and password using single sign-on (SSO)
- Click on the **Work** tab

Note: You will not be asked to provide your credentials or need to sign in again. If you log out of PeopleSync, you will be logged out of all NYU Pages.

Basic Navigation

The following are basic navigation tools that you can use when you are in PeopleSync.

Inbox: The inbox icon located in the top right of the page is comprised of two tabs: Actions and Notifications that present a single, consolidated view of all actions and notifications related to you or your organization in PeopleSync.

Search Function: Use the search box in the top left corner to access reports, tasks, and objects in PeopleSync. You can use the search categories to filter scope of your searches to better target the results you are interested in.

Related Actions Button: Another way to access tasks and reports, the Related Actions button will list all the tasks and actions that can be taken on that object. Similar to the Search, it will only show actions and information applicable to your security access.

Workday

The Workday page is the default home page for employees assigned one or more organization support role(s).

PeopleSync provides optional dashboards (called “worklets”), containing organization and employee data that you may choose to add to your My Workday page. These dashboards provide real-time data each time you access your My Workday page.

- You may choose to have up to five worklets on this page
- Use the grey gear at the top right of the page to add a worklet
- Click the grey plus sign to add another row under Optional Worklets
- Use the prompt icon to select the worklet to add

PeopleSync allows you to complete tasks and update/add information required for your work and personal needs. You are able to:

- View and edit your personal information
- View and edit your contact information
- View and edit your retirement savings information
- View your compensation and pay-related information, including payment elections For changes that do not require approval, changes will be reflected in real-time

Viewing Your PeopleSync Inbox

The inbox icon is located under the icon next to your name in the top right corner of the page and is easily accessible from every page in PeopleSync. It provides a single, consolidated view of actions and notifications related to you and your organization in PeopleSync. The red number on the top right of the icon indicates the number of open items in your inbox.

Once you click the inbox icon, the **Actions** and **Archive** tabs will appear.

- **Actions** allow you to enter data, submit tasks, and/or approve information.
- **Archive** allows you to see any tasks or steps in a business process that you have submitted. From the Archive tab, you can see a short summary of a task or business process.

Processing a Request

As an Employee, PeopleSync allows you to initiate tasks in the system. These include processes associated with adding or editing personal data or updating your benefit elections. Once a request is submitted, it routes to the next person in the approval chain for review and approval.

Workflow	A workflow determines the steps and required actions within a process or transaction. It provides system tracking (including requiring approvals based on business rules), and tracking of approvals, denials, and status history for specific transactions. Workflows are not intended to replace conversations between employees.
Initiator	An initiator submits the request to begin a business process.
Reviewer	A reviewer receives an approval request and can edit the field values of the business process.
Approver	An approver receives a request to approve a business process. An approver does not have the ability to edit any field values of the business process.
Approvals	Approvals are used when immediate action or review is required, and to support policy or compliance requirements. A workflow will not continue until it has been approved.
Notifications	Notifications are used when a person needs to be informed, but is not required to take action. Notifications do not stop workflows.

Processing a To-Do

PeopleSync tasks can also include various **To-Dos**, which are a checklist of activities or requests for you to perform specific actions outside of or in PeopleSync.

1. Review the details of the instructions to complete the process. If there are any questions, please contact PeopleLink for assistance.

2. Provide a comment, if required. All PeopleSync comments are permanent and will always remain in PeopleSync to be seen by others.
3. Click the **Submit** button to complete the process. Click the **Save for Later** button to complete the To-Do task at a later time. Some processes will not continue until the associated To-Do has been completed.

Utilizing the PeopleSync Search functionality

Using PeopleSync’s search functionality, you can enter any field or object into the Search field and the system returns various matches (i.e., reports, tasks). You can also type partial text to obtain search results.

PeopleSync’s search enables you to limit the scope of your search, producing quick and accurate results. The **Categories** section after your search enables you to select a search scope and target your search to one of the following areas of interest:

- Common
- Organizations
- People
- Processes
- Procurement
- Security
- Staffing
- All of Workday

Note: The search results you receive and are able to access when using PeopleSync’s search functionality are based on PeopleSync’s security rules. If you do not have access to something in PeopleSync you believe you should be able to view, please contact PeopleLink to submit a formal request.

Configuring Your Landing Page

PeopleSync allows you to customize your landing page by adding or removing optional worklets.

1. Click the gear icon on the top right corner of the *Workday* page.
2. This will display the *Configure Worklets*.
3. The **Required Worklets** are compulsory on your *Workday* page. **Optional Worklets** allow you to add worklets to your *Workday* page.
4. Click the **Prompt** icon to select the specific worklet you want to add to your landing page. Use the + or - to add or remove optional worklets.

Key PeopleSync Terminology

The following are key PeopleSync terminology to help you understand the system better.

Worklets	The icons on the PeopleSync page that are used to view data, initiate business processes, and perform tasks.
Inbox	The location within PeopleSync that provides a single, consolidated view of actions and notifications related to you and your organization in PeopleSync.
Hyperlinks	A linked item (text in blue font) that can be clicked to take additional actions or view more information.
Related Actions	A button placed on the left or right of any hyperlink and looks like three dots and highlights orange when you hover above it. It displays actions that can be performed on an item.

Hyperlinks

Any text appearing in blue font indicates that it is a hyperlink. You can click the hyperlink to take action or view additional information (based on security role).

For additional information please contact PeopleLink at (212) 992-LINK [5465] or AskPeopleLink@nyu.edu.