PeopleSync Newsletter: Issue 27

In this issue:

- Coming Soon to PeopleSync: Faculty Tenure Milestone Dashboards (US Only)
- Adjuncts and Activity Pay Details (US Only)
- **Reports Corner:** Active Primary and Non-Primary Job Effective Date (US Only)
- **PeopleSync Error Alerts:** Termination and Non-Primary Jobs (US Only)
- **PeopleSync Tips:** How to Search PeopleSync
- **Ticket Spotlight: Performance Management:** *I can view my goals but can only edit some of them – why? (US Only)*

Coming Soon to PeopleSync: Faculty Tenure Milestone Dashboards (US Only)

Beginning this summer for the first time at NYU Washington Square, we will have the ability to review faculty appointment and milestone review dates across all schools through PeopleSync dashboards in real-time.

The **Faculty Lifecycle Dashboard Project** is currently scheduled to go live in June with a Pilot Phase that includes three schools: Steinhardt, Stern, and the School of Nursing. Upon successful completion of the pilot, all schools will go live before the end of summer 2020.

The launch of this project represents the beginning of a journey to create a comprehensive faculty information system for the university. This initial release will result in increased transparency, consistency, and consolidation of important faculty data. For questions regarding this project, please email Mohammed Jibril at mj2320@nyu.edu.

Adjuncts and Activity Pay Details (US Only)

In response to recent inquiries, this is a reminder that Adjuncts can view details about their activity pay in PeopleSync. This includes courses/activities which have been assigned to the employee as well as payment details. Please see the following steps for the employee.

1. Login to PeopleSync and select the **cloud icon**.
2. Select **View Profile**. If you have more than one adjunct job, select from a list of jobs using the **plus** (**+**) icon next to the position title, which is above the Actions bar.
3. Select **Compensation**. The course, start/end date, payment details such as hours, rate, etc, planned and paid-to-date amount will display. The amounts and number of payments are hyperlinked to additional information such as amount by pay period.

Reports Corner: Active Primary and Non-Primary Jobs Effective Date (US Only)

We've added a new column to highlight specific reports in PeopleSync.

For this issue, we review **Active Primary** and **Non-Primary Jobs Effective Date.** To access the report, simply type the report name in the PeopleSync search field.

<u>Description</u>: A comprehensive report providing **Employee Details** (hire date, most recent performance rating, gender/ethnicity), **Job Details** (position ID, title, job profile, compensation grade, employee type, scheduled hours) and salary information.

If the employee has non-primary jobs they are included as well. Report includes prompts so data may be run by effective date, sup org, job family, job profile, comp grade, or worker.

<u>Who can run</u>: *HR Partner, HR Analyst, and Compensation Partner*

PeopleSync Error Alerts:

Termination and Non- Primary Jobs (US Only)

For employee's with non-primary jobs, there is a validation rule which prevents termination from the primary job until the non-primary jobs have been ended. This is a safeguard to ensure an employee's non-primary jobs are reviewed prior to separation.

The following alert appears:

Error

You cannot terminate this employee because the employee has active additional jobs. End the additional jobs before you terminate the employee.

To correct this error, you should:

1. If your school manages the non-primary job, review this job and process **a Job Change > End Job** using an effective date that is on or before the Termination date.

2. If another school manages this job, please reach out to that school so they are aware of the termination. The school will need to end this non-primary job or set up the record so that the non-primary becomes the primary position. (For assistance on this, contact PeopleLink).

PeopleSync Tips: How to Search

Below are tips you can use for improving search results in PeopleSync.

Add a prefix to the search term to narrow searching:
- **Org:** results of organizations (supervisory, custom)
- **Worker:** results of employees
- **Job:** results for job profiles
- **Position:** results for job requisitions and positions
OR

Click on a category in the left side menu to narrow results. Example: Enter an employee's name in the search bar and select enter. Select a category:
- **Organization:** results of organizations (supervisory, custom)
- **People:** results of employees
- **Processes:** results for business processes/events
- **Staffing:** results of employees, positions

Ticket Spotlight: Performance Management (US Only)

As we launch performance management in PeopleSync we have received questions from both employees and managers on this process. Below is a common ticket from employees on editing goals:

*I can view my goals but can only edit some of them – why?*

To access Goals, the Employee can login to PeopleSync > select the **Performance** worklet > then select the **Goals** button.

There are **two** main reasons why an employee is unable to edit a goal:

1. **The goal is pending approval.**
   The Employee can view the status of the goal in the Goals list. If the goal has been submitted and has routed to the manager, the goal is flagged **(Pending Approval).**

   - The Manager has either not yet actioned on the goal, or:

In Progress Goals

Build time travel car. (Pending approval) ⟵

In Progress   Performance
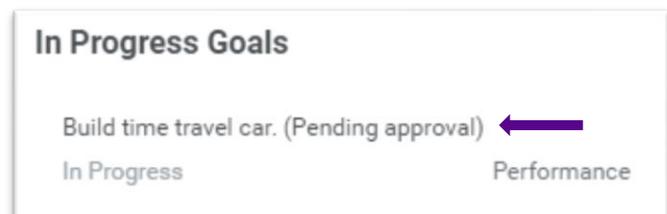
- The Manager has **Sent Back** the goal. (The employee can check their PeopleSync Inbox> Actions for a **Revise Goal** task and action on this goal).

- **HR** or **PeopleLink** can also verify if the goal is pending approval by navigating to the employee record. Select **Job > Worker History > Worker History by Category > Goals and Review**.

- Under the **Goals** section are the **Business Process** and **Status** columns. Select the **Manage Goals** link under **Business Process**.

- **Details** tab: Select **View** and check if the goal is **(Pending Approval)**.

- **Process** tab: This shows the workflow of the transaction. This will show if the transaction is awaiting action by the Manager or has been sent back.

- *Tip: If the employee has created a goal and submitted it but wishes to edit it, the employee can always contact the Manager and ask that it is sent back to the employee.*

2. **The goal was created by the Manager and marked as <u>not</u> editable.** Managers can create and cascade goals to an employee or department and mark them as not editable. If so, the employee will be unable to revise this goal.

- From the **Performance worklet > Goals** button, the Employee can view this goal in the In Progress Goals list.

- A goal created by a Manager will have no status.

- The **Employee** can select the **Edit** button and then the goal from the list.

- If the goal is editable, the fields will activate and can be changed.

- If the goal is not editable, the employee can only edit the **Status** field.