Main Dashboard

Upon logging into NEOED, employees and supervisors will see their Main Dashboard, a single central hub for them to manage tasks, see their direct reports, and view their personal details.

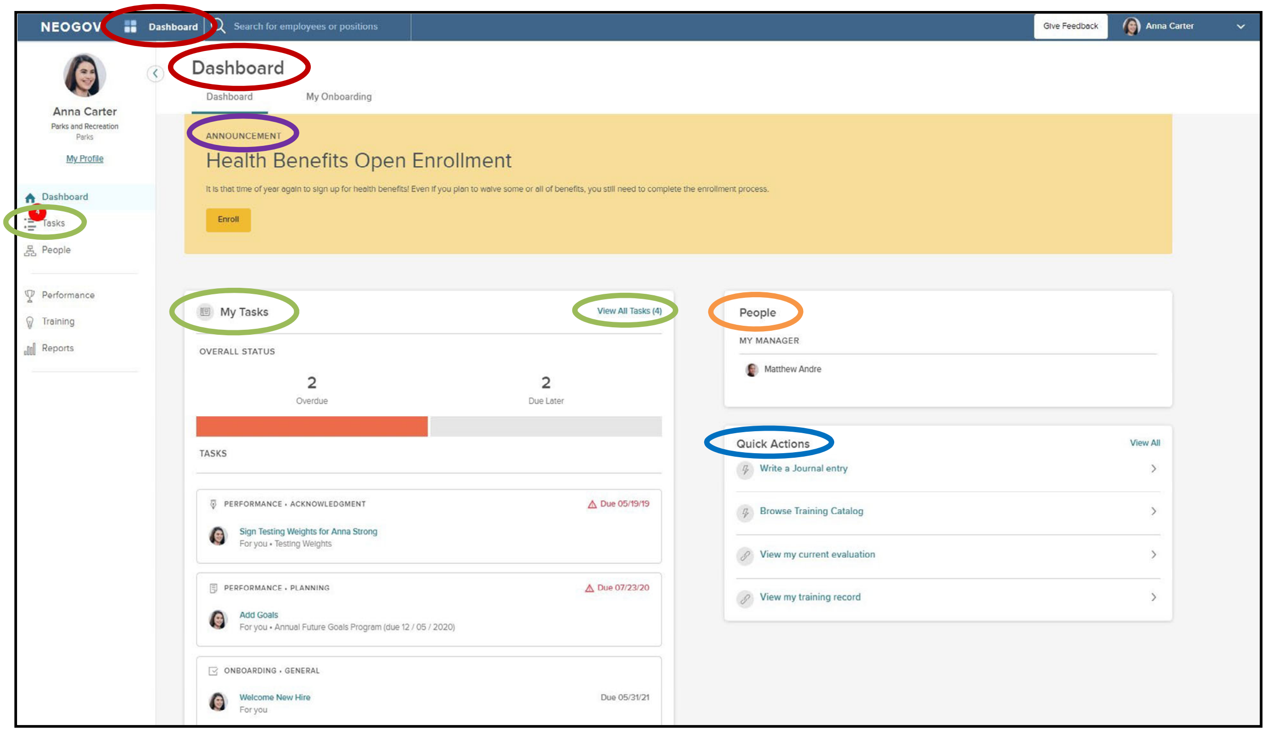

Figure 1: Main Dashboard Tab

The Main Dashboard is made up of widgets that organize information and actions for employees and supervisors. These widgets allow employees to act right from the Dashboard and include important metrics, filters, and key information so employees can focus on the highest priority tasks.

Announcements

At the top of the Main Dashboard, a banner will appear with HR Announcements, capturing employee attention immediately upon sign-in. Announcements allow HR administrators to promote key news, events, and actions to employees throughout the year.

My Tasks

Tasks across all NEOED products are now accessible on the Main Dashboard in one area instead of switching products to see them. My Tasks displays up to 5 employee tasks with the earliest due dates, with a toggle to **View All Tasks** in the upper right corner of the widget. Quick filters for tasks that are Overdue, Due This Week, and Due Later provide employees with easy access to anything time-sensitive. To see more than the five earliest tasks, the **Tasks** page in the left side navigation shows a complete listing of the employee's tasks across OHC, Onboard, Perform, Learn, and eForms portals.

People

The employee's direct reports and the employee's supervisor can now be viewed in a separate widget on the Main Dashboard. For each direct report, there will also be a message to show how many overdue tasks that employee has assigned, which links to a list of the relevant tasks. There is also a link to take the supervisor to the "My Team" page, where supervisors can view their direct reports in more detail. More information about this is listed in the People section of this guide, on page 5.

Quick Actions

HR has configured tasks that employees perform frequently within NEOED so they're available for quick access on the Main Dashboard. This may include submitting a tuition waiver, browsing the NEOED Learn training catalog, or writing a journal entry in Perform. HR will display up to six (6) quick actions on the Main Dashboard.

My Onboarding

Employees will also see a My Onboarding tab on their Main Dashboard. This tab will take them to their Onboarding Portal.

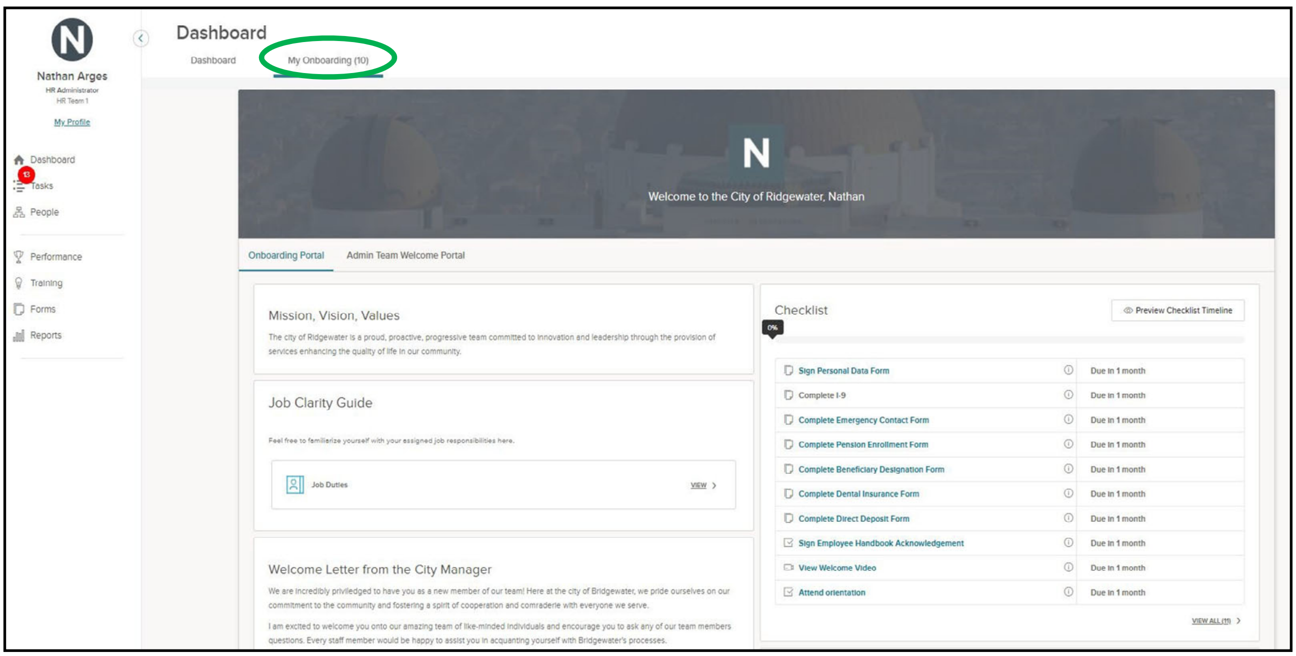

Figure 2: My Onboarding Tab

- During Onboarding, new employees' and supervisors' default tab on the Main Dashboard will be My Onboarding.
- Once Onboarding is complete, or if they are an active employee without onboarding tasks, the employee's default view is the Main Dashboard. Employees are able to return to their My Onboarding tab at any time to review their onboarding links, documents, and tasks.

Side Menu

On the left side of the Main Dashboard page, employees will see a side navigation menu. This menu includes quick links to specific pages for NEOED portals (as shown below) and employee-specific actions. The options employees will see here will vary based on their user role and permissions set up by Human Resources.

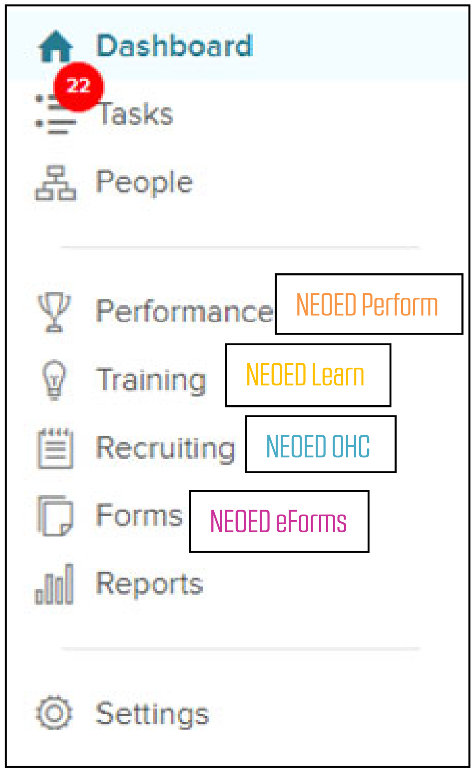

Figure 3: Side Menu

Selecting one of the Side Menu options will open the chosen page. The Side Navigation menu is accessible from each of these pages for easy navigation between different work processes. Employees can minimize the menu using the arrow icon near the top but can still select the page options using the icons. They can expand the menu again by selecting the arrow at the top again.

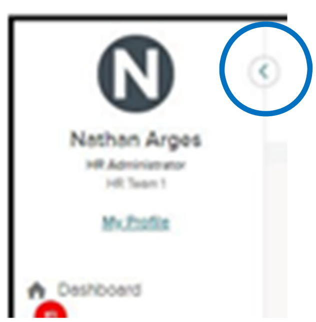

Figure 4: Arrow Icon

Tasks

The Tasks page allows employees to see all their NEOED tasks in one place. Employees can see both **To Do** and **Completed** Tasks and have easy visibility on quick metrics and task due dates.

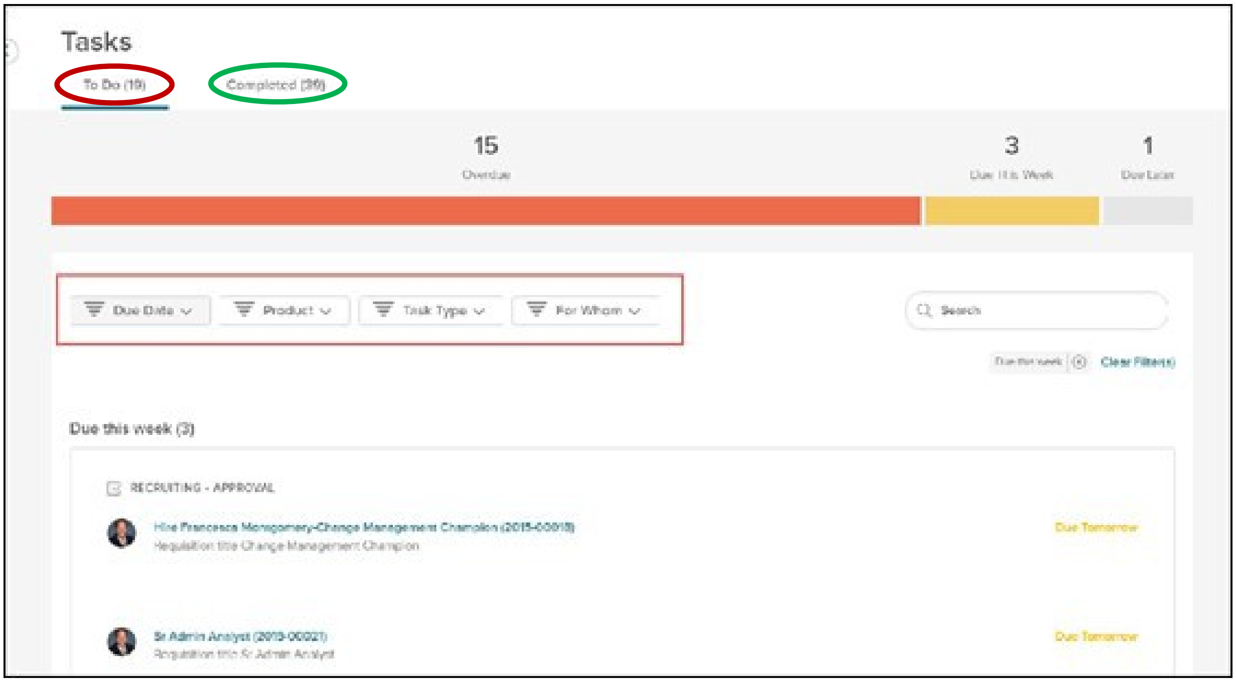

Figure 5: Filtering Options on Tasks Page

Employees can search for specific tasks, or filter the tasks assigned to them either by Due Date, Product, Task Type, or For Whom.

Employees can also act on tasks directly from this page simply by selecting the name of thetask, which will be in a bold font and blue color.

People

The People page gives employees visibility to the other employees and supervisors within their hierarchy or chain of command. Supervisors will see three tabs here to help them best manage their direct reports: My Team, My Team's Tasks, and Org Chart.

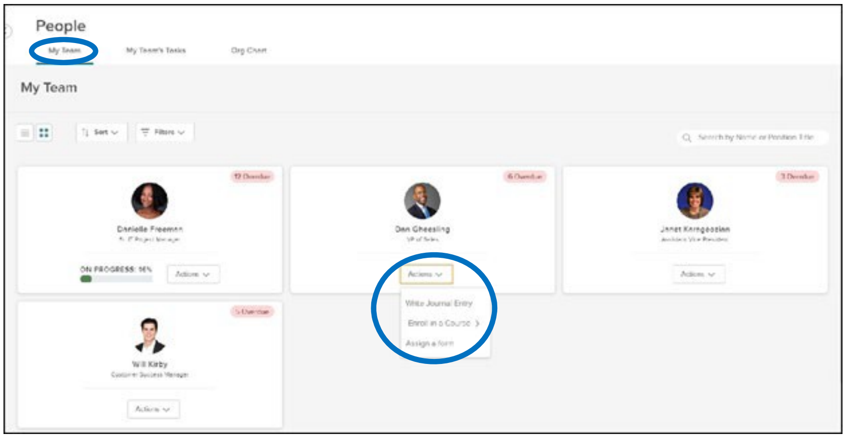

Figure 6: Action Options on People Page

On the **My Team** tab, supervisors can view their direct reports and see instant visibility on any overdue tasks each employee may have. The **Actions** dropdown on each employee's personnel card provides an easy way for supervisors to create a journal entry, enroll their employee in training, and/or assign their employee a form.

On the My Team's Tasks tab, supervisors can view tasks assigned to their employees and have more oversight over what their team needs to do.

Lastly, your employees will also have access to the Org Chart tab.

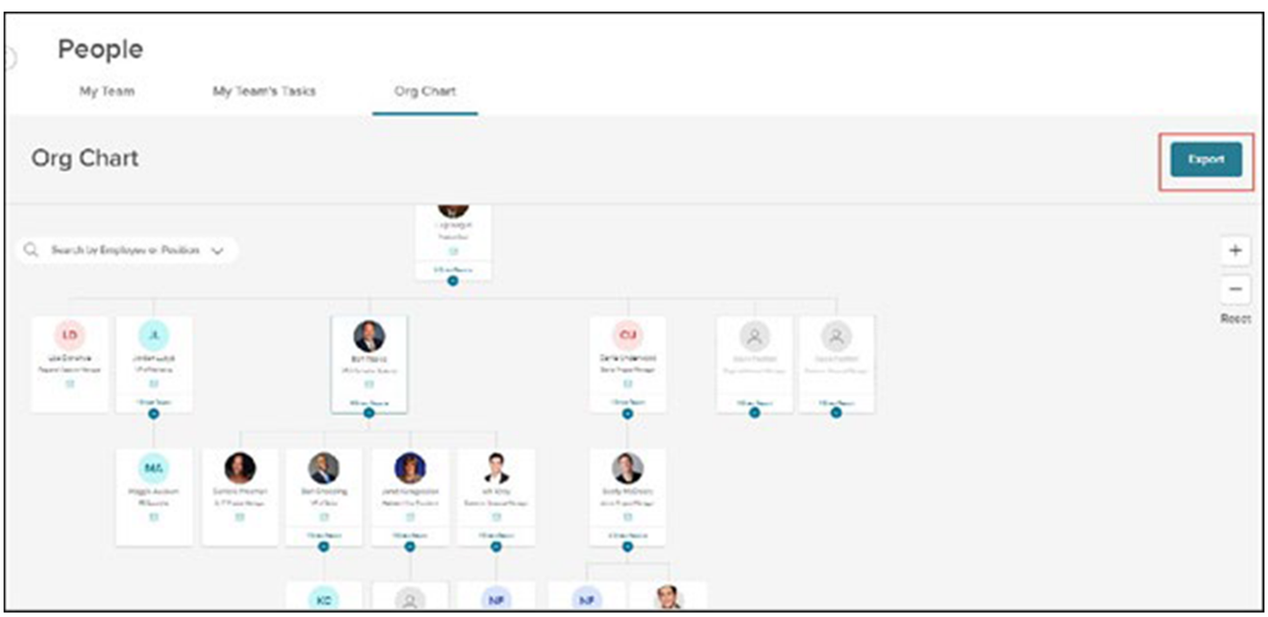

Figure 7: Exporting the Org Chart

This page includes an interactive, revamped organizational chart where employees can see the full DSU organizational chart at a glance, including employee titles and information on the employee's direct reports.

Employees can use the triangle toggles above and beneath the "personnel cards" to see the hierarchy and the connections between faculty and staff at your organization. From the organizational chart, employees can send an email directly from the employee card or select their own name to be taken to their Employee Profile.

This Org Chart can be exported and printed, if needed, by clicking on the blue Export button in the upper right corner of the Org Chart.

Employees who do not supervise other employees within NEOED role will have access to the People Page, but will only be able to access the Org Chart tab.

Performance

This page shows all information related to the **NEOED Perform** portal, or staff performance evaluations. This includes the employee's own evaluations, their team's evaluations (if a supervisor), and the journal hub.

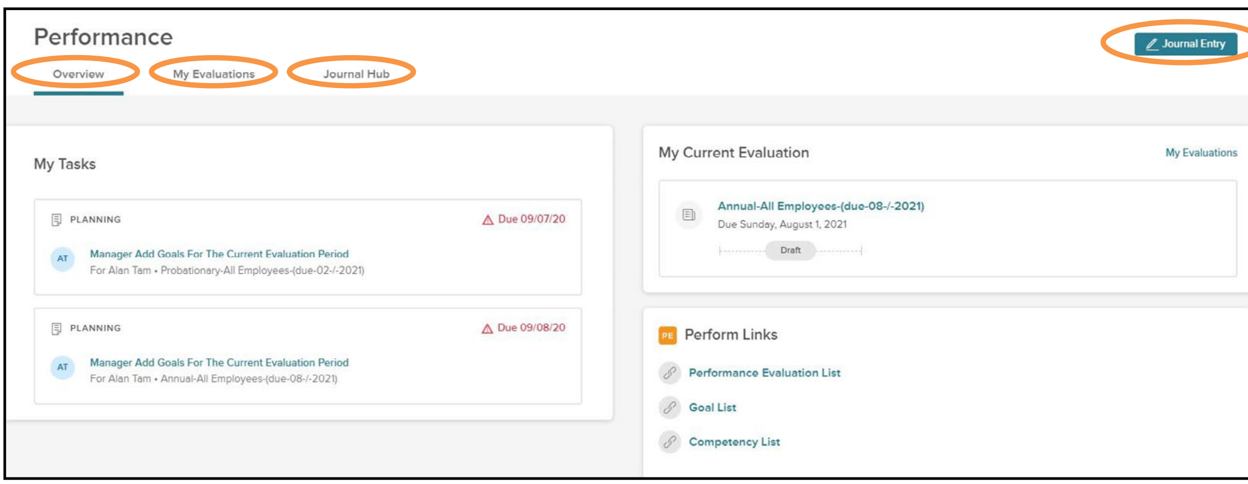

Figure 8: Performance Page

Employees can add a **Journal Entry** directly from any of the Performance page tabs.

From the **Overview** tab, employees are able to see their current Performance Review-related tasks.

The **My Evaluations** tab allows employees to access their current and past evaluations. Employees are able to filter this list between Active, Completed, or Archived evaluations.

The **Journal Hub** allows employees to see all of their journal entries, including Current, Pending, and Draft entries. This page allows employees to see at a glance who an entry is about, who created the journal entry and when, and if the entry has been shared or is private. Employees can select View More to read the full content of any journal entry.

Training

This page shows all information related to the **NEOED Learn** portal, including the employee's courses, the course catalog, and their training activity report.

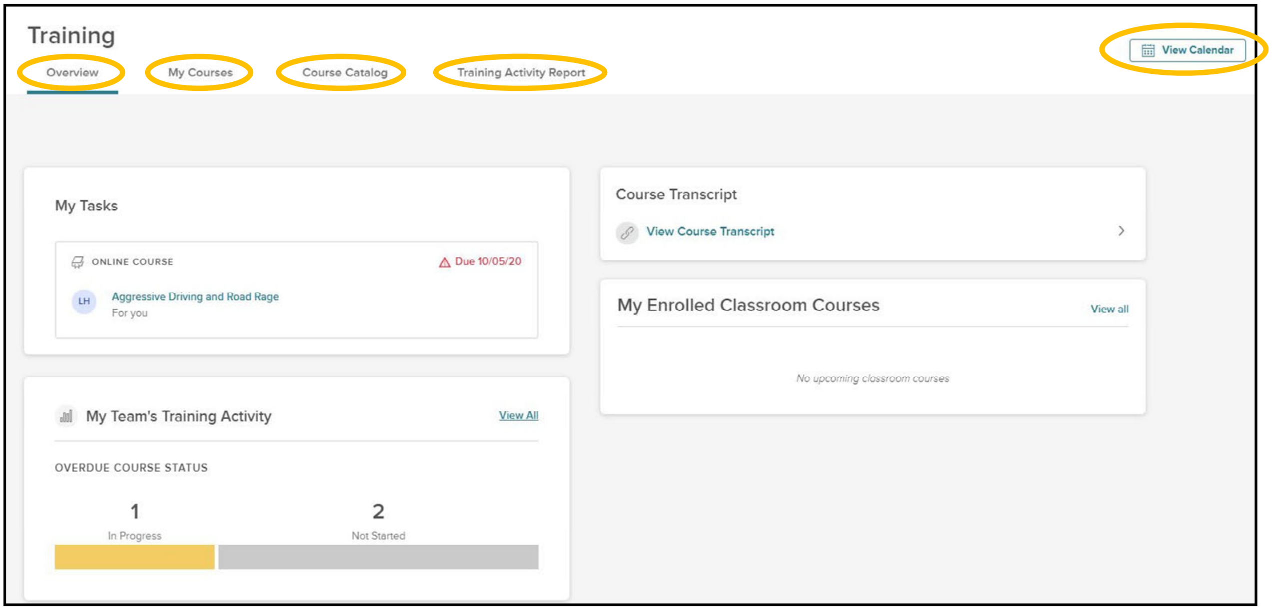

Figure 9: Training Page

Employees can click on the **View Calendar** button to see upcoming in-person/classroom trainings from any of the Training tabs.

The **Overview** tab allows employees to see their training related tasks, upcoming classroom courses, and access their Course Transcript. Supervisors will also see a widget detailing their team's training activity, allowing them to see at a glance if their direct reports have overdue or incomplete courses.

Employees can view their past and current enrollments on the **My Courses** Tab. This page lists vital information on Learning Plans and Courses, including the type of course, its completion status, and whether it was an online or in-person/classroom course. Employees can toggle this list between card and list view, or filter or search the list to see specific enrollments. Employees are also able to select the courses to see more details about the course, review course materials, or take course surveys.

The **Course Catalog** tab allows employees to view and enroll in the courses available to them. This page can be searched or filtered by topic, course type, duration, or category.

The **Training Activity Report** tab gives employees detailed metrics and reporting on their Course and Learning Plan activity. Interactive charts allow employees to quickly view their progress to see Overdue or Pending class information to help them act quickly on the courses most vital to their work.

Recruiting

This page shows all information related to the recruitments the employee is involved in within **NEOED Online Hiring Center (OHC)**, including Subject Matter Expert (SME) reviews, etc. Employees who do not have an OHC role will not have the Recruiting page available.

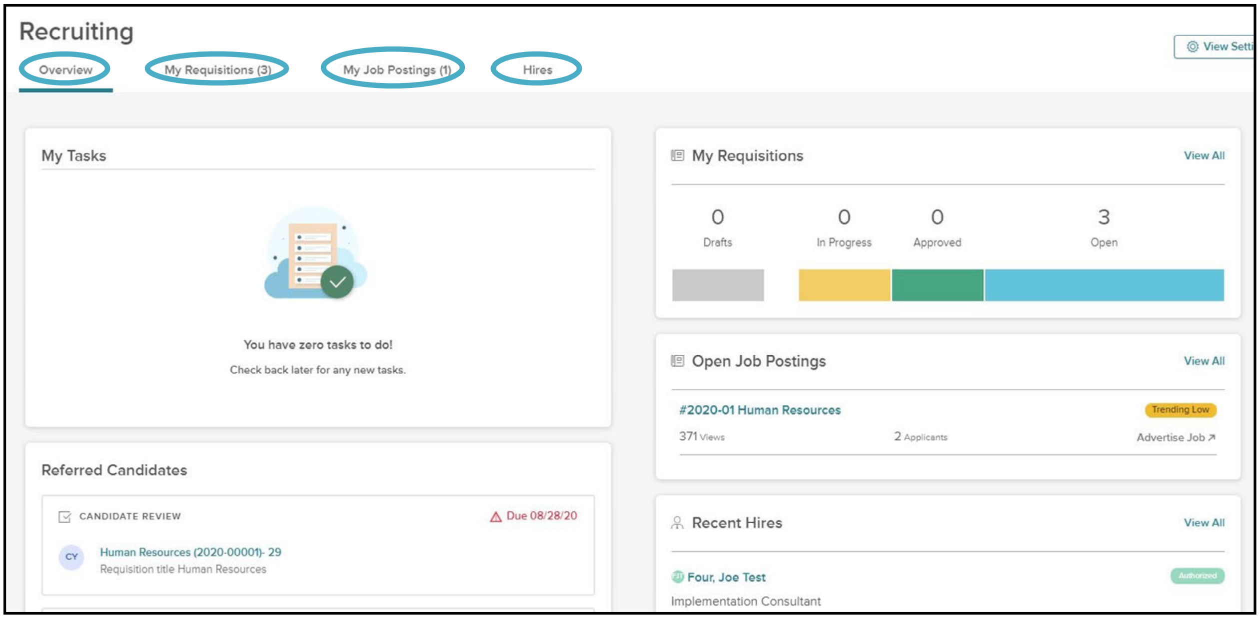

Figure 10: Recruiting Page

Employees are able to adjust the View Settings from any tab in the Recruiting page.

On the **Overview** tab, employees are able to view their current recruitment Tasks,

On the **My Requisitions** tab, employees can view any requisitions where they are assigned by HR as the hiring manager and the requisition status is Draft, In Progress, Approved, or Open. Employees can click on the name of the requisition to go to it and perform whatever actions are needed. Employees can filter the requisition list and click to view all requisitions they have access to from this tab.

On the **My Job Postings** tab, employees will see all open job postings that they have permission to see.

On the **Hires** tab, employees will see a list of all hires they have access to and be able to filter them based on status: Pending Release, Approval In Progress, Awaiting Authorization, or Authorized. Employees can click the hire to go to OHC and see more detail about the hire.

Forms

This page shows all information related to the **NEOED eForms** portal, including the employee's in-progress forms, completed forms, and their team's form status.

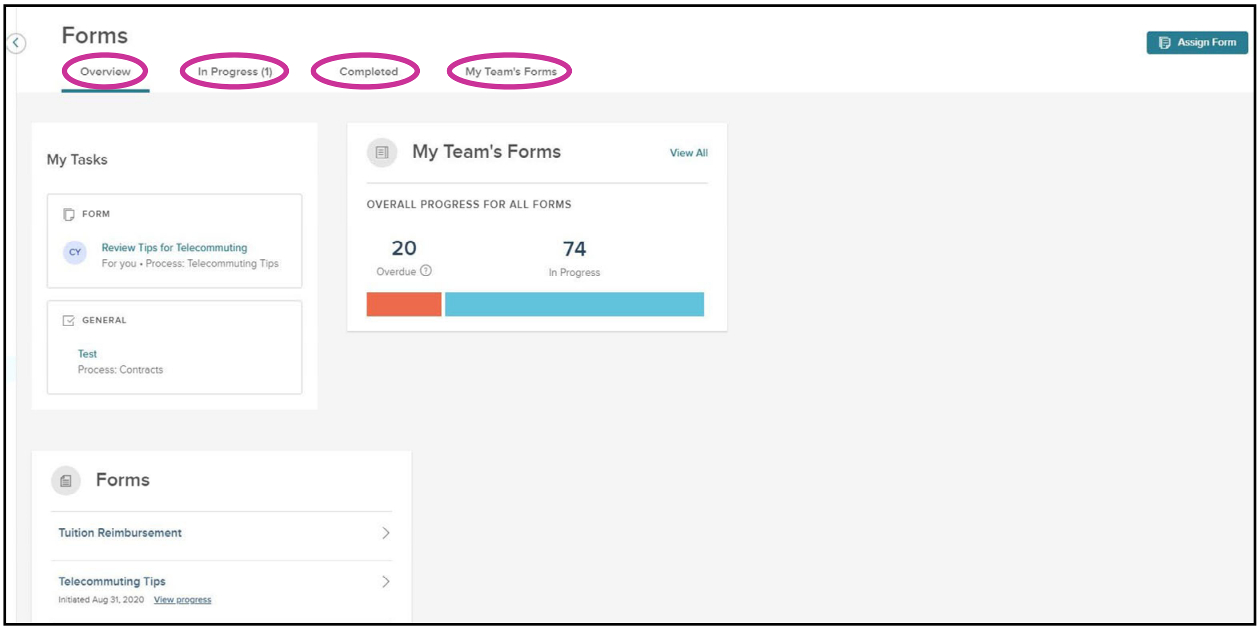

Figure 11: Forms Page

On the **Overview** tab, employees can see their tasks and available forms. Supervisors will also see interactive metrics on their Team's Forms.

Employees can view their in-progress or completed forms from the **In Progress** and **Completed** tabs. A number count appears next to the In Progress tab to give instant visibility on the number of forms waiting for the Employee's action.

Supervisors will also see the **My Team's Forms** tab. The My Team's Forms section allows supervisors to keep track of the outstanding forms assigned or initiated by the employees they have access to. It will display the total Overdue and In Progress forms to be completed.

Reports

The Reports tab is available for all campus employees. This page shows reports across all NEOED portals the employee has access to.

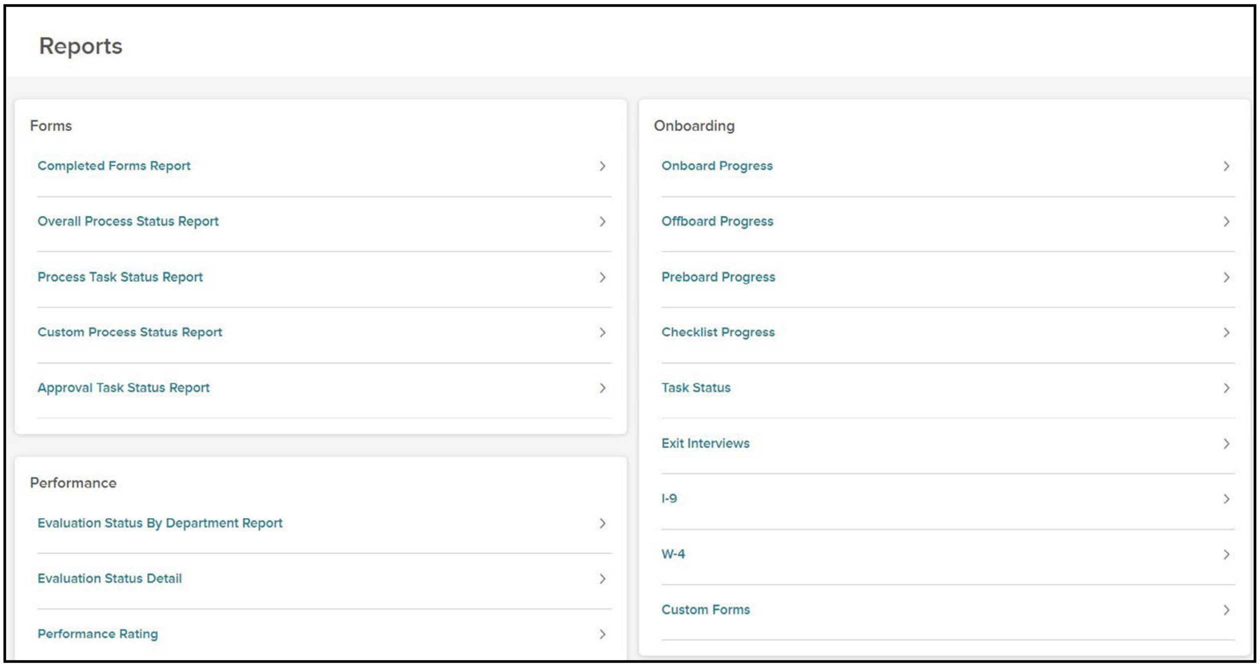

Figure 12: Reports Page

The report options available to employees on the Reports page will vary depending the employee's permissions and job scope (set up within NEOED) and past activity. Employees can select a report name, or the arrow beside it to take them to the Report Generator for that report.

The employee will have options to additionally filter or sort the report as well as export it to CSV, PDF or Excel format.

Performing Advanced Tasks

Sometimes, to accomplish tasks or navigate to more detailed visibility, the Unified Dashboard will take employees to the NEOED portal where that action is tied to. When this happens, the Unified Dashboard will prompt employees with a “Navigating to” window or loading screen.

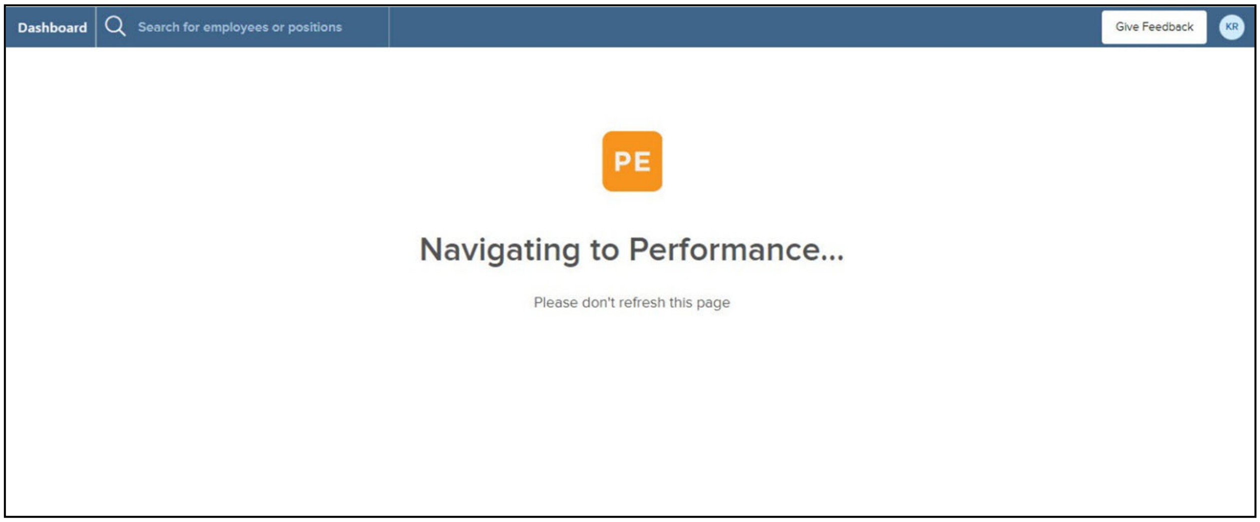

Figure 13: Navigating to Loading Screen

Once in the designated portal, employees will continue with the action that they began on the Unified Dashboard or complete additional tasks.

Employees can return to the Unified Dashboard at any time by selecting either the University’s Logo or the Dashboard icon in the top left of their screen.