

# PEOPLEADMIN 7 USER GUIDE



NORTH  
CAROLINA  
CENTRAL  
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## HUMAN RESOURCES DEPARTMENT

# Position Management

## EPA (Faculty and Non-Faculty) and SPA

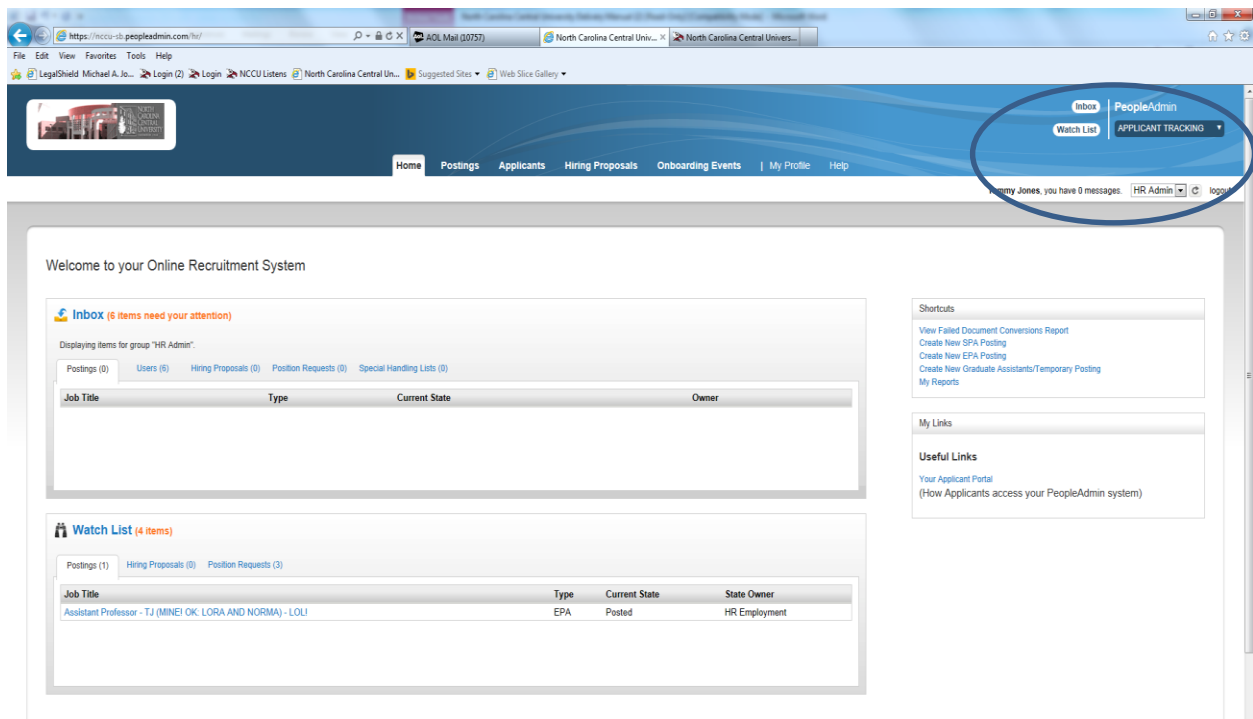
### MODULE II

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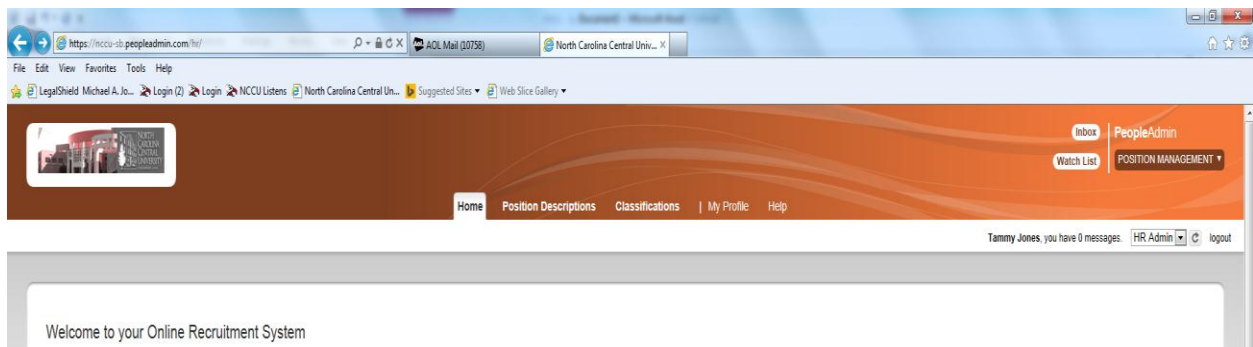
## Create a New Position Description

### EPA (Faculty-Non Faculty), SPA, Graduate Assistant and Temporary

Login to PeopleAdmin at <https://jobs.nccu.edu/hr>. Select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen. The heading of the page will turn to orange.

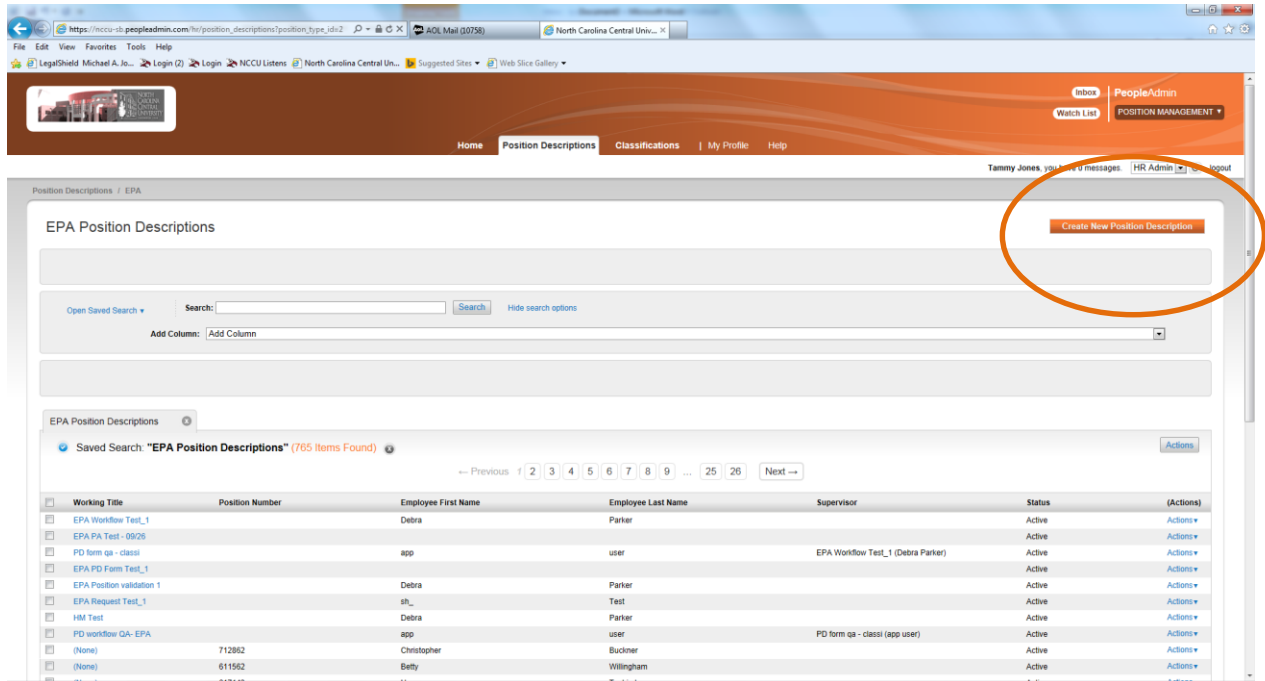


To start the process, select “Position Management” from the top right corner drop down menu. Note: The navigation bar will change from the color blue to orange.

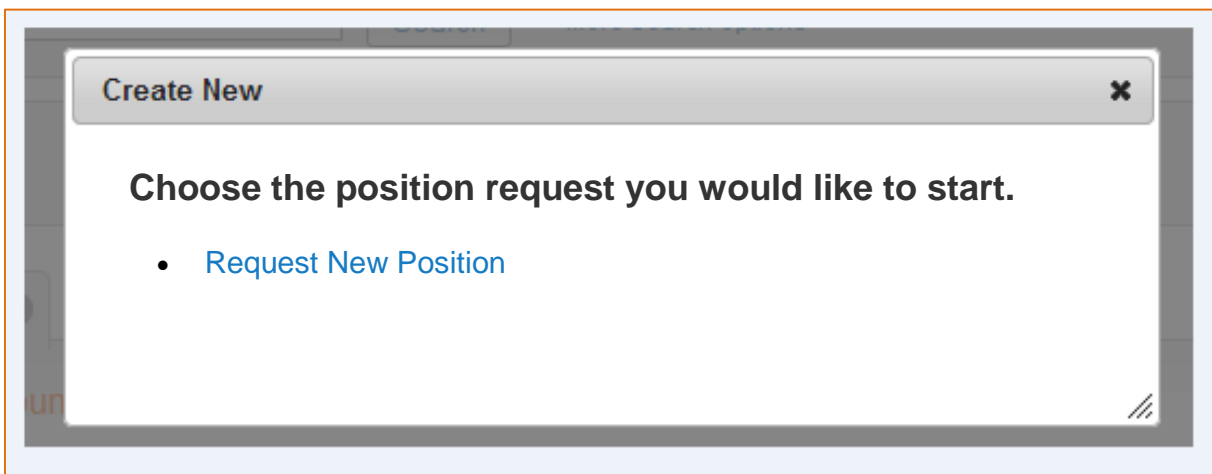


Note: The EPA choices display positions with current actions in progress.

## Select **Create New Position Description**



Click on the orange **Create New Position Description** button located on the top right corner of the page:



New positions can either be **cloned (copied)** from an existing position description or created from **scratch**.

## To Create a New Position by Cloning (Copying) an Existing Position

➔ Identify the position to be cloned (copied) from the list of Approved Position Descriptions at the bottom of the screen. Review the position description to ensure it is accurate by hovering over the Actions button and choose View. Use the back button on your browser to return to the previous screen.

To clone the position, click the radio button next to the selected position description and click on the orange Start Position Request button located in the top right corner of the page.

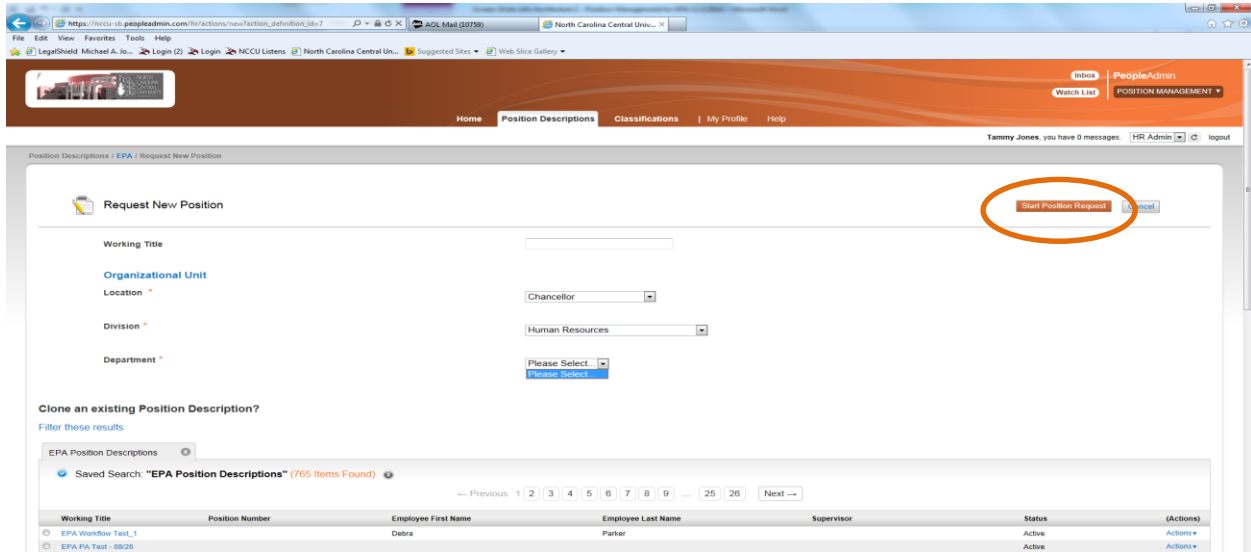
**NOTE:** The fields on the new position will pre-populate with all the information from the existing position (except the position number) and can be edited as needed.

The screenshot shows the 'Request New Position' form in the PeopleAdmin system. The form includes fields for Working Title, Organizational Unit, Location (a dropdown menu), Division, and Department. In the top right corner of the form, there are 'Start Position Request' and 'Cancel' buttons. Below the form, a search bar is visible with the text 'Filter these results'. A search result is shown for 'EPA Position Descriptions' with 765 items found. A table lists the search results:

Working Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
EPA Workflow Test_1		Debra	Parker		Active	Actions
EPA PA Test - 09/26					Active	Actions

## To Create a New Position From Scratch

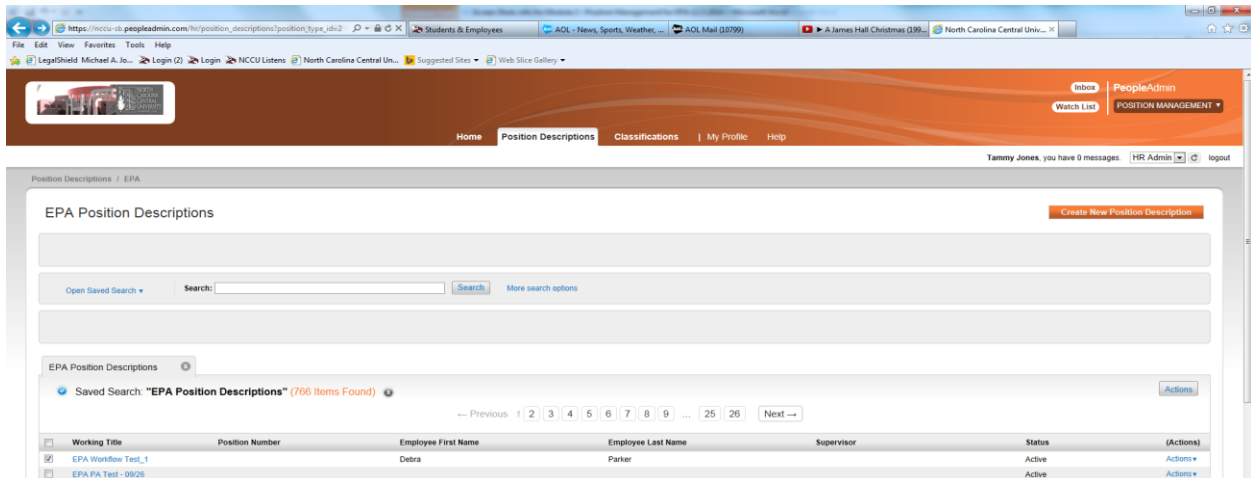
- ➔ Enter the Working title in the **Position Title** field. Select the location, division, department from the drop-down list. Click on the orange Start Position Request button located in the top right corner of the page.



## Classification Details

- ➔ You may skip this step if you do not know the role title, or, you may propose and select a role title by scrolling through the list of Role Titles or creating a filtered search. To create a filtered search click on "Filter these results" and a feature box will pop-up to enter criteria. The role title will default for cloned positions.

**Note:** The final determination of Role Titles is based on a classification/compensation review by Human Resources.



➡ To view details about the working title, hover over Actions and choose View.

The screenshot shows the 'EPA Position Descriptions' page in PeopleAdmin. A table lists various position descriptions with columns for Working Title, Position Number, Employee First Name, Employee Last Name, Supervisor, and Status. The 'Actions' column for each row contains a dropdown menu with 'View' and 'Edit' options. The 'View' button for the first row, 'EPA Workflow Test\_1', is circled in red.

Working Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	Actions
<input checked="" type="checkbox"/> EPA Workflow Test_1		Debra	Parker		Active	View Edit
<input type="checkbox"/> EPA PA Test - 09/26					Active	Actions
<input type="checkbox"/> PD form qa - classi		app	user	EPA Workflow Test_1 (Debra Parker)	Active	Actions
<input type="checkbox"/> EPA PD Form Test_1					Active	Actions
<input type="checkbox"/> EPA Position validation 1		Debra	Parker		Active	Actions
<input type="checkbox"/> EPA Request Test_1		sh_	Test		Active	Actions
<input type="checkbox"/> HM Test		Debra	Parker		Active	Actions
<input type="checkbox"/> PD workflow QA- EPA		app	user	PD form qa - classi (app user)	Active	Actions
<input type="checkbox"/> (None)	712862	Christopher	Buckner		Active	Actions
<input type="checkbox"/> (None)	611562	Betty	Willingham		Active	Actions
<input type="checkbox"/> (None)	617143	Hope	Tyehmba		Active	Actions
<input type="checkbox"/> (None)		Debra	Saunders-White		Active	Actions

➡ Click the radio button next to the selected Working Title and hover over to edit in the drop down button in the top right corner to go to the **Position Details** tab.

The screenshot shows the 'Editing Position Description' page for 'EPA / EPA Workflow Test\_1'. The 'Classification Selection' tab is active, displaying a list of classifications. The 'View Classification' button is highlighted in the top right corner of the classification list.

Classification Job Title	Classification Status	Last Updated	(Actions)
<input type="radio"/> EPA PA Test - 09/26	Approved	September 26, 2014 at 06:04 AM	Actions
<input type="radio"/> classification form QA	Approved	September 26, 2014 at 06:44 AM	Actions
<input type="radio"/> EPA Classification Test_1	Approved	September 29, 2014 at 03:50 AM	Actions
<input type="radio"/> Dual Employment Other Agency	Approved		Actions
<input type="radio"/> Chancellor	Approved		Actions
<input type="radio"/> VC Student Affairs & EM	Approved		Actions
<input checked="" type="radio"/> Chief Legal Counsel	Approved		Actions
<input type="radio"/> Vice Chancellor	Approved		Actions
<input type="radio"/> Provost/Vice Chancellor	Approved		Actions
<input type="radio"/> VC Finance and Administration	Approved		Actions
<input type="radio"/> VC Institutional Advancement	Approved		Actions
<input type="radio"/> VC Graduate Ed & Research	Approved		Actions
<input type="radio"/> Directory of Library Services	Approved		Actions
<input type="radio"/> Dean	Approved		Actions

Complete all required information that did not default from Classification details and use the “next” button to continue through the Position Documents tab. Click the Summary tab to review edits.

## Employee Details

The screenshot displays the 'Employee' details page in the PeopleAdmin system. The left sidebar contains a navigation menu with options: Classification Selection, Employee, Position Funding Information, ADA Checklist Form, Supervisory Position, Position Documents, and Summary. The main content area is titled 'Employee' and includes a 'Vacate Position' button. Below this is a 'Details' section with a table containing the following information:

First Name	Debra
Last Name	Parker
Work Email	
Employee ID	820035622

Below the details table is a 'Users' section with a search bar and a table of search results for 'user search' (7 items found). The table has columns for User Group, Default Group, Status, Full Name, and Actions.

User Group	Default Group	Status	Full Name	(Actions)
Employee	Employee	Approved	Parker, Derrick	Actions
Approver, Employee	Employee	Approved	Parker, Debra	Actions
Employee	Employee	Approved	Parker, Sonya	Actions
Employee	Employee	Approved	Parker, Hadiyah	Actions
Employee	Employee	Approved	Parker, Freddie	Actions
Employee	Employee	Approved	Parker, Anita	Actions
Employee	Employee	Approved	Parker, Evalee	Actions

## Position Details

The screenshot displays the 'Position Details' page in the PeopleAdmin system. The left sidebar contains a navigation menu with options: Classification Selection, Employee, Position Details, Position Funding Information, ADA Checklist Form, Supervisory Position, Position Documents, and Summary. The main content area is titled 'Position Details' and includes a 'Check spelling' dropdown. Below this is a 'Required Information' section with the following fields:

- Employee First Name: Debra
- Employee Last Name: Parker
- Banner ID: 820035622
- Faculty Rank: (if applicable)

Below the required information is a 'Classification Information' section with the following fields:

- Position/Classification Title
- Schematic Code
- EPA Position Type

The 'Position Overview' section includes a text area for the Primary Purpose of the Position.

# Position Funding Information

# ADA Checklist



## Supervisory Position

**Supervisory Position**

The **Supervisor** Tab allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the POSITION TYPE (SPA or EPA) being created. To select a supervisor in a different Position Type (for example EPA supervising SPA), click on **"Filter these results"** and select the Position Type to which the supervisor of the position belongs. Then click on **"Search"** to access the list of supervisors in the selected Position Type. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then click on the orange **"Next>>"** button located on both the top and bottom right-hand corners of the page.

Position Descriptions - Filter these results

Saved Search: "EPA Position Descriptions" (767 Items Found)

Working Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
EPA Workflow Test_1		Debra	Parker		Active	Actions
EPA PA Test - 89/26				EPA Workflow Test_1 (Debra Parker)	Active	Actions
FD form qa - class		app	user		Active	Actions
EPA PD Form Test_1					Active	Actions
EPA Position validation 1		Debra	Parker		Active	Actions
EPA Request Test_1		st_	Test		Active	Actions
HM Test		Debra	Parker		Active	Actions
FD workflow QA EPA		app	user	FD form qa - class (app user)	Active	Actions
(None)	71392	Christopher	Buckner		Active	Actions
(None)	811562	Beth	Willingham		Active	Actions
(None)	817143	Hope	Tyehmba		Active	Actions
(None)	811526	Debra	Saunders-White		Active	Actions
(None)	811542	Wendell	Phillips		Active	Actions
(None)	811569				Active	Actions
(None)	816849				Active	Actions

## Position Documents

➔ Other documents may also be attached, i.e., relevant memos, position budget justification, etc. To attach a document, hover the cursor over the button next to the document type.

The following drop down choices will appear for you to select.

**Position Documents**

PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Organizational Chart			Actions
Memo			<ul style="list-style-type: none"> <li>Upload New</li> <li>Create New</li> <li>Choose Existing</li> <li>Add by URL</li> </ul>

➔ Select **Upload New** to upload a document from your files. Click on submit. All uploaded files must be converted to PDF and you should see a message “PDF Complete” when the files have successfully uploaded.

Upload a test

To upload your document, provide a name and description of the document. To choose a file to upload, click the **Choose File** button and select the file from your computer. When you are ready to submit your document, click the **Submit** button.

Name

Description

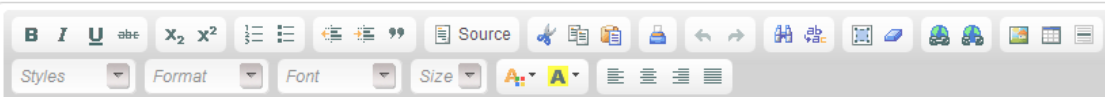
File to upload

➔ Select **Create New** to open the system format editor to create a document. Once you are finished click on Submit then Confirm.

Create a New test

Name

Description



➔ Select **Choose Existing** to link a document that was previously attached by selecting the document from the list, then click on Submit then Confirm.

Your Previously Uploaded Documents

A list of documents previously uploaded will appear here.

## Summary

The Summary Tab provides the opportunity to review the position request and make any changes before submitting it for further approval. The top section provides information about the action, i.e. current status, position type, who created the action and the owner, etc.

The screenshot shows a web browser window displaying the PeopleAdmin interface. The page title is "Position Description: EPA Workflow Test\_1 (EPA)". The "Summary" tab is selected and circled in orange. Below the tab, there are sections for "Classification Selection" (None specified), "Employee" (Seated User: Debra Parker), and a table of details for the seated user.

Seated User	
Details	
First Name	Debra
Last Name	Parker
Work Email	
Employee ID	820935622

➡ To initiate the approval queue, hover over the “Take Action On Position” button and chose from the list of available actions.

➡ Once the Action is selected, a comment box will appear and a comment may be added that will be incorporated into the e-mail notification sent to the next approver. Please keep in mind these comments will become part of the position record and cannot be removed.

If you want to monitor the progress and easily access it later, add the action to your watch list. You will be able to view it quickly from your home screen. Select **Submit**.

**Take Action** ✕

**Move directly to 'Level 1 Review'**

Comments (optional)

Add this action to your watch list?

Note: You have the ability to add this action to your watch list by checking the box located in the Comment section.

Information messages will appear at the top of the screen to let you know your action has been routed to your selected approver or to alert you to an error. Successful transitioned messages appear in Green and Error messages appear in Red.

i **Action was successfully transitioned**

! **Department can't be blank**

i **Action was successfully transitioned, and it was added to your watch list.**

Watch List
POSITION MANAGEMENT ▾

Home
Position Descriptions
Role Titles
My Profile
Help

Lynn Riggs, you have 1 message
Hiring Official ▾
logout

Actions / ... / [New PD Action: Instruct Faculty & Executive](#) / [New Position definition](#) / [Summary](#)

**New PD Action: Instruct Faculty & Executive :**  
**Associate Professor (Instructional/Executive)**  
Current Status: Level 1 Review

Position Type:  
Instructional/Executive

Department: Law School  
Operations - 3N1000

Created by: Lynn Riggs

Owner: Level 1

Summary

History

Settings

Classification Details

Position Classification Details

<b>Role Title</b>	Associate Professor/12-Mth
<b>Role Code</b>	01025
<b>FLSA</b>	
<b>Contribution Level</b>	

## Update/Reclassify an Existing Position

Login to PeopleAdmin at <https://jobs.nccu.edu/hr>. Select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen. The heading of page will turn to orange.

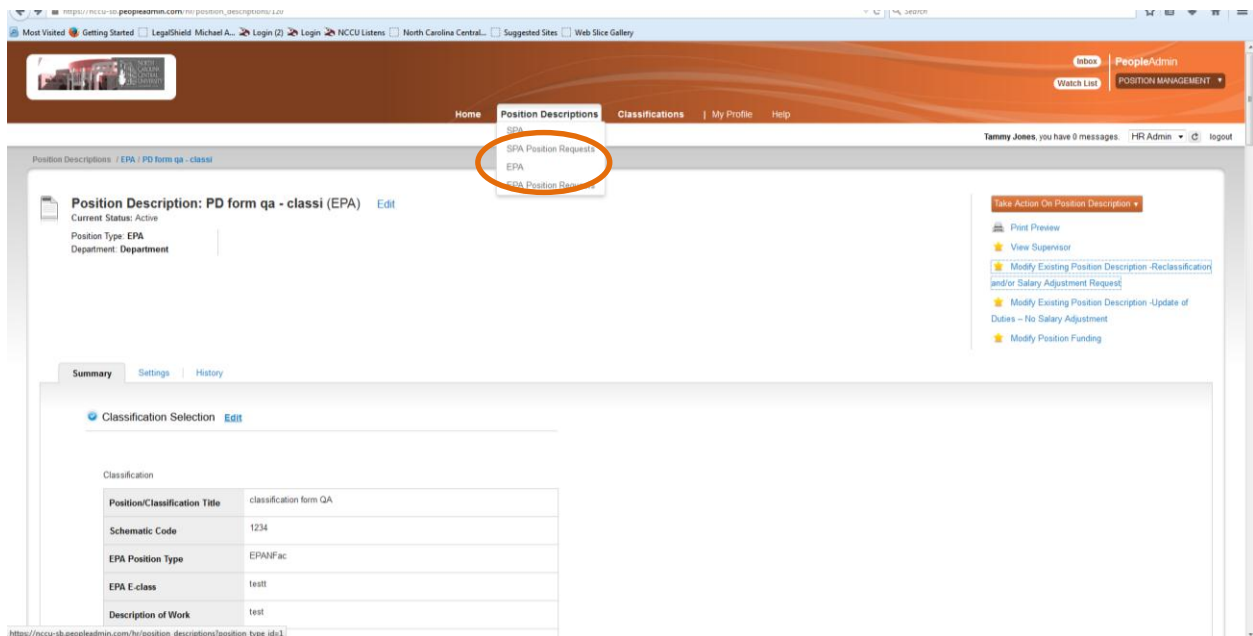
The screenshot shows the PeopleAdmin interface with a blue header. The navigation bar includes: Home, Postings, Applicants, Hiring Proposals, Onboarding Events, My Profile, and Help. In the top right corner, there is an 'Inbox' button and a 'PeopleAdmin' dropdown menu with 'APPLICANT TRACKING' selected. Below the navigation bar, the main content area displays a 'Welcome to your Online Recruitment System' message. On the left, there is an 'Inbox (6 items need your attention)' section with a table of items for the 'HR Admin' group. On the right, there are 'Shortcuts' and 'My Links' sections.

Job Title	Type	Current State	Owner

Job Title	Type	Current State	State Owner
Assistant Professor - TJ (MINEI OK LORA AND NORMA) - LOU	EPA	Posted	HR Employment

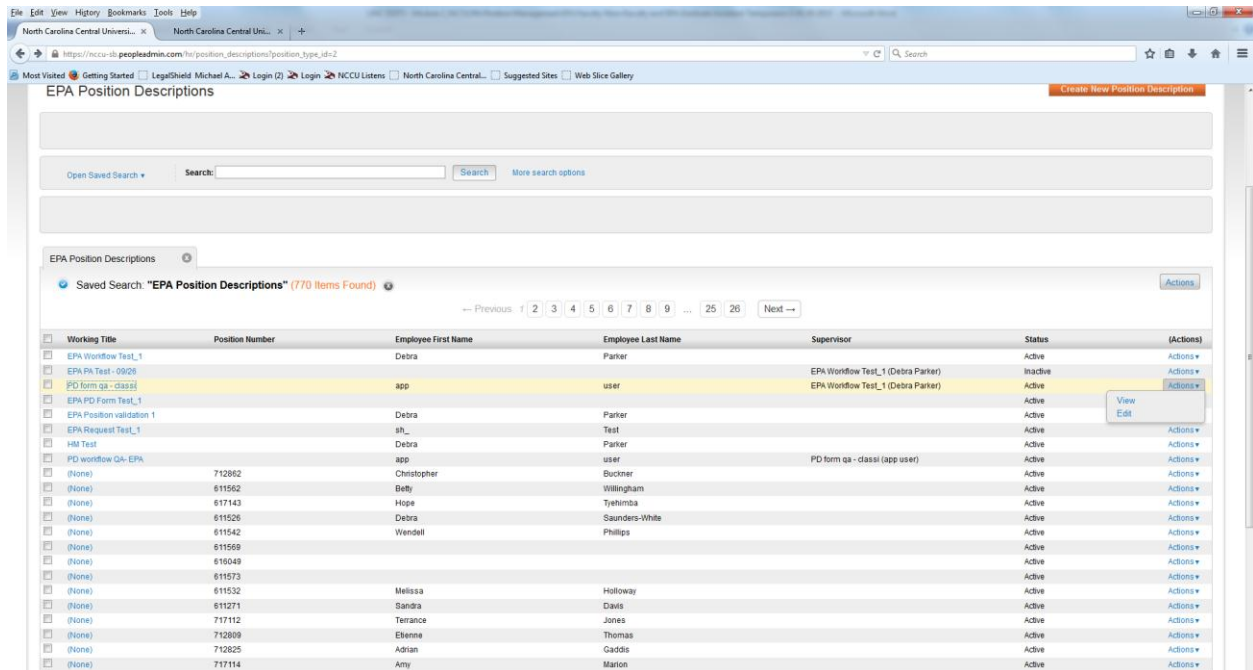
To start the process, select “Position Management” from the top right corner drop down menu. **NOTE:** The navigation bar will change from the color blue to orange.

The screenshot shows the PeopleAdmin interface with an orange header. The navigation bar includes: Home, Position Descriptions, Classifications, My Profile, and Help. In the top right corner, there is an 'Inbox' button and a 'PeopleAdmin' dropdown menu with 'POSITION MANAGEMENT' selected. Below the navigation bar, the main content area displays a 'Welcome to your Online Recruitment System' message.



**Note:** The Actions choices display positions with current actions in progress.

➡ Hover over the Action tab, and click “View”.



Click on Modify Existing Position Description – Reclassification and/or Salary Adjustment Request.

Position Description: PD form qa - classi (EPA) Edit

Current Status: Active  
Position Type: EPA  
Department: Department

Take Action On Position Description

- Print Preview
- View Summary
- Modify Existing Position Description -Reclassification and/or Salary Adjustment Request**
- Modify Existing Position Description -Update of Duties - No Salary Adjustment
- Modify Position Funding

Summary Settings History

Classification Selection Edit

Position/Classification Title	classification form QA
Schematic Code	1234
EPA Position Type	EPANIFac
EPA E class	testt

Start Modify Existing Position Description -Reclassification and/or Salary Adjustment Request Position Request on PD form qa - classi?

Once it has been started, this position request will lock the position description from other updates until the position request has completed.

Start