

# PEOPLEADMIN 7 USER GUIDE



NORTH  
CAROLINA  
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FOUNDED 1910

## HUMAN RESOURCES DEPARTMENT

### Position Management

### Create A New Position Description

EPA Faculty & Non-Faculty, SPA, Graduate Assistants, and Temporaries

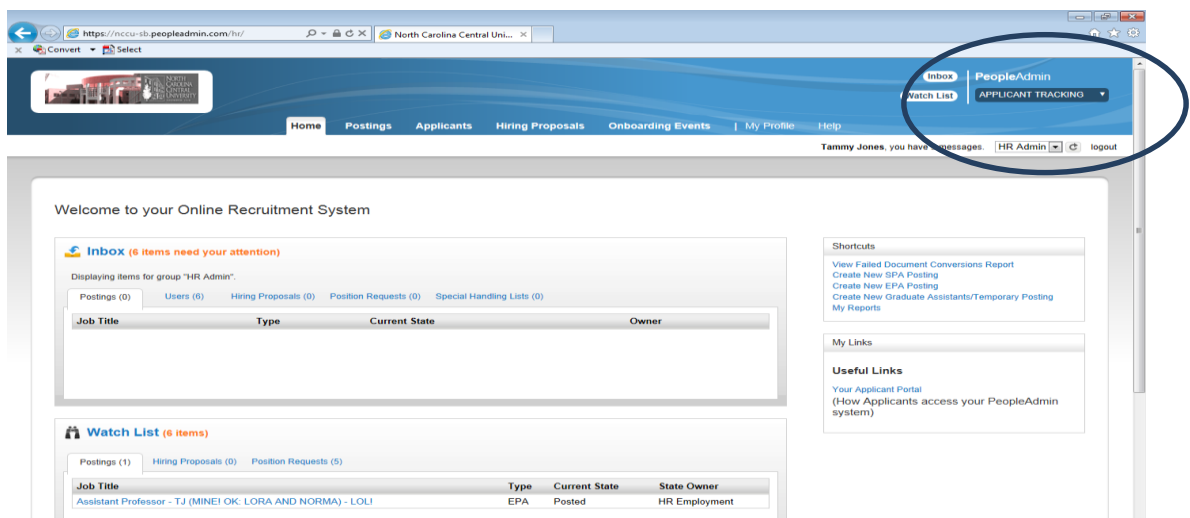
## MODULE III

<b>Create a New Position Description</b>	Page 2
<b>Classification</b>	Page 6
<b>Position Details</b>	Page 7
<b>Internal Documents</b>	Page 7
<b>Summary</b>	Page 9

# Create a New Position Description

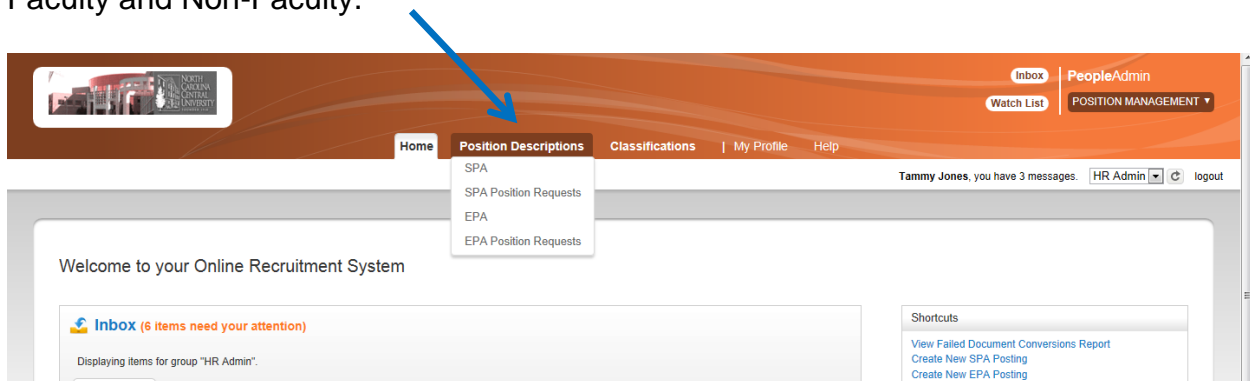
Login to PeopleAdmin at <https://jobs.nccu.edu/hr>. Requests for position changes, modifications, update/reclassify are completed in the **orange Position Management** side. Requests for postings and hiring proposals are completed in the **blue Applicant Tracking** side.

**Before a posting can be created you must have an approved position description.** To begin, select the **Position Management** module by hovering over the Applicant Tracking heading located at the top right hand section of the screen and select **Position Management**.



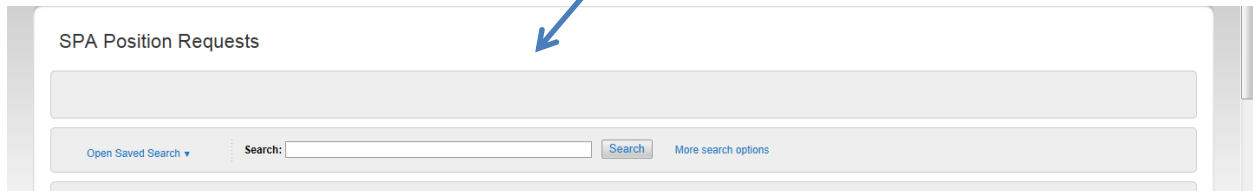
The heading of page will turn to orange.

A “skeleton” or “shell” of your position description (PD) may already be loaded in the system. To start the process and check for an existing PD, hover over Position Description on the **Navigation Bar** and select the type of position to be created EPA Faculty and Non-Faculty.

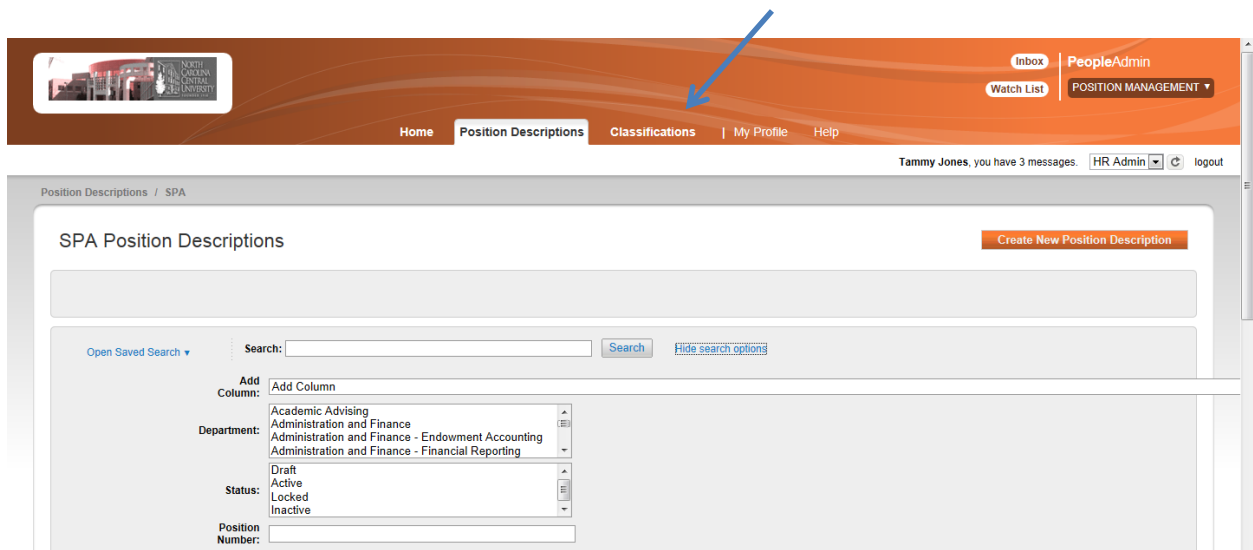


In the search bar, search for the position you want to update and/or recruit for:

## SPA Position Descriptions



You can expand the search field and/or limit your results by choosing “**more search options.**” If you have started to update a position description and saved it, click on “**draft**” to see your work.



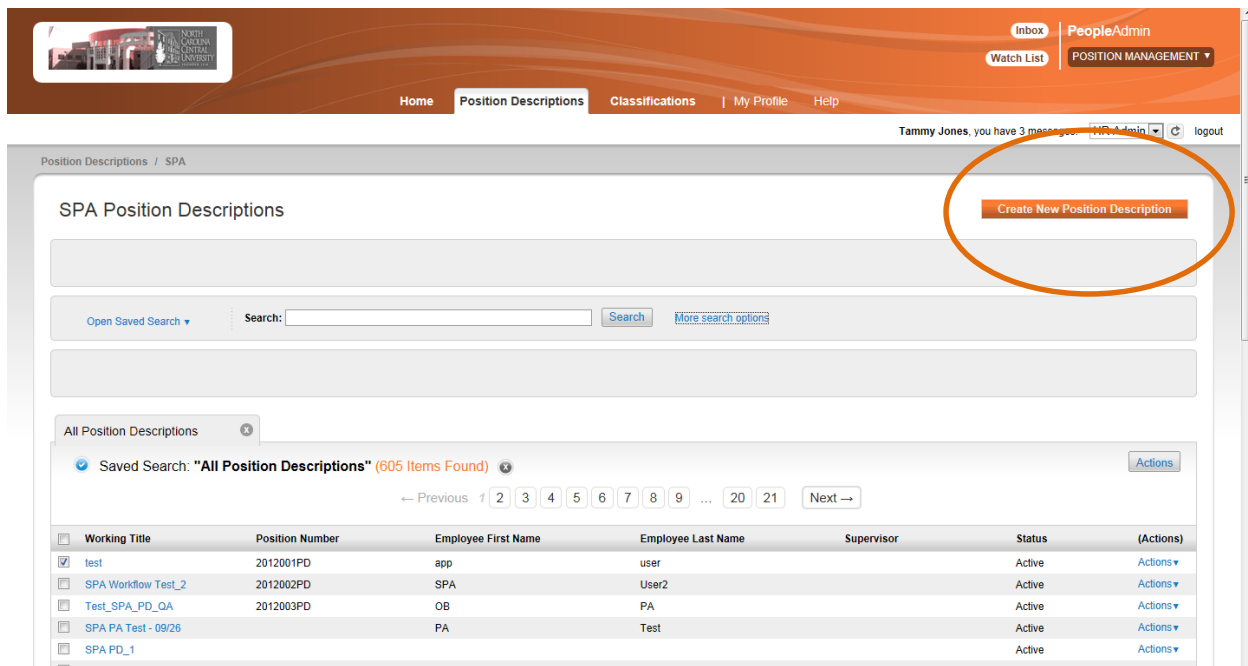
If the position you wish to update is listed, select the button on the left or click on any blue link. If you do not see the position listed, please contact HR for assistance.

The screenshot shows a search results table with the following columns: Role Title, Position Title, Department, Position Number, Employment Category, Agency, and (Actions). A blue arrow points to the 'Role Title' column, another points to the 'Department' column, and a third points to the 'Actions' column.

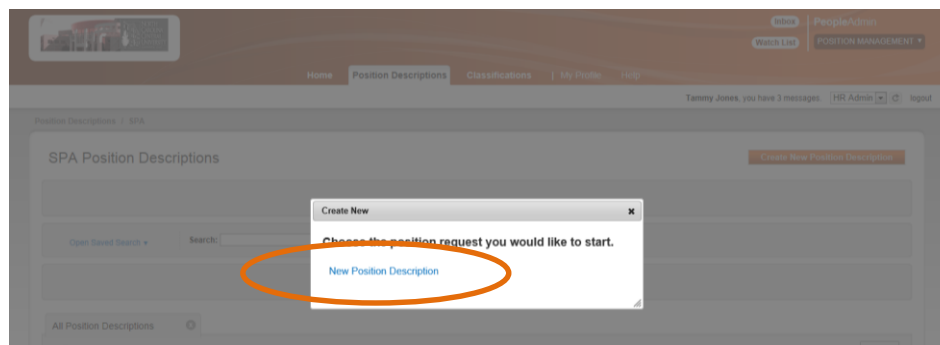
Role Title	Position Title	Department	Position Number	Employment Category	Agency	(Actions)
HSKP & Apparel Serv Worker I	Custodial Lead Worker	280000 Student Health Service	00123W		W&M (204)	Actions

If you are creating a brand new position, and a skeleton or shell PD is not already loaded, follow the steps below. **If the shell of the position description is loaded, follow the instructions to “Update/Reclassify” in a separate guide.**

Click **Create New Position Description**



Click on **New Position Description** in the pop up window



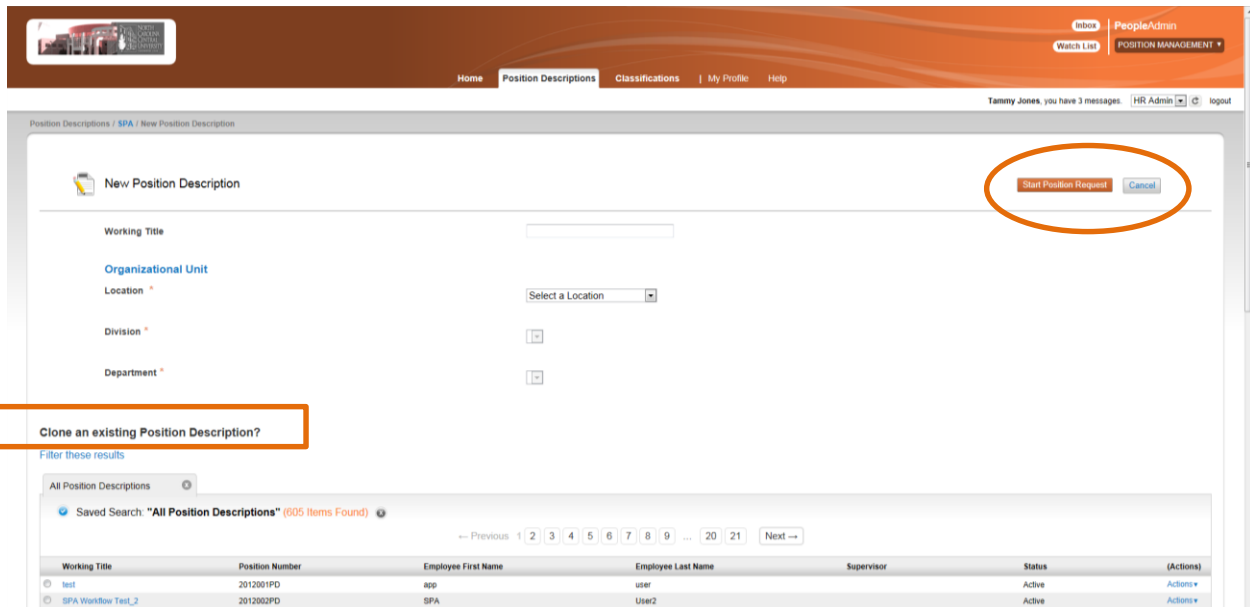
New positions can either be **cloned (copied)** from an existing position description or created from **scratch**.

### To create a new position by cloning an existing position:

Identify the position to be cloned 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 "Create New Position Description" button in the top right section.

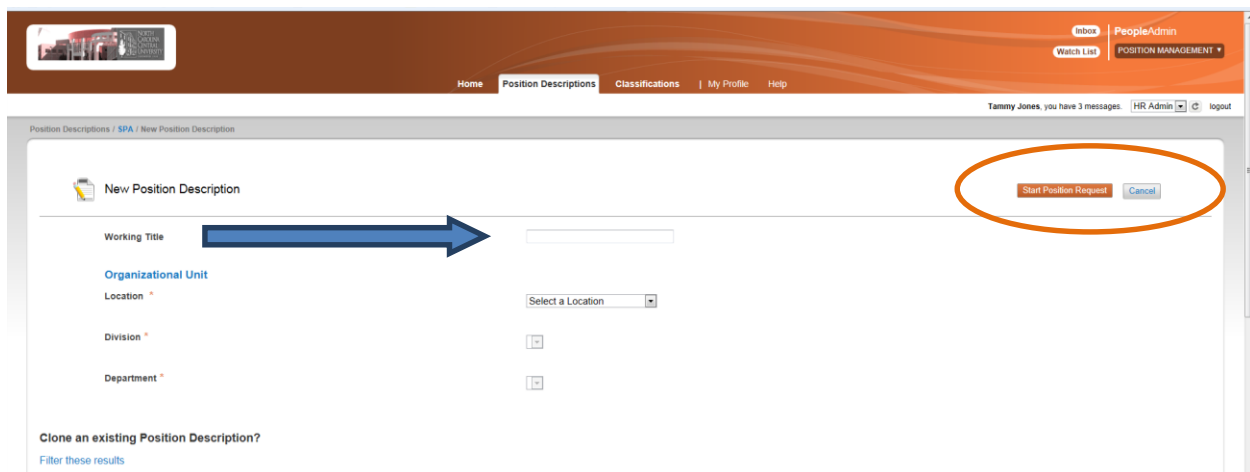
**NOTE:** The fields on the new position will pre-populate with all the information from the existing position (except the position number) and can be edited as needed.



## To create a new position from scratch:

Click on “Create New Position Description” tab and click on “New Position Description.”

Enter the Working title in the **Position Title** field. Select the **Department [Banner Orgn]** from the drop-down list. Click on the “Start Position Request” button in the top right section. Once you select “**Start Position Request**” the position description will be locked for editing.



## Classification

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.

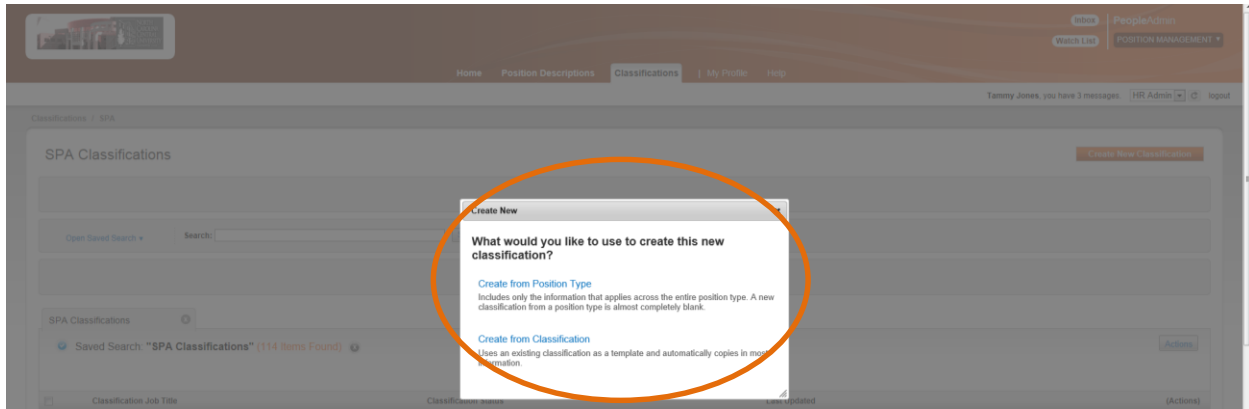
To view details about the role title, hover over the Actions and choose View Classification.

The screenshot shows the PeopleAdmin interface for SPA Classifications. At the top right, there are links for 'inbox', 'PeopleAdmin', 'Watch List', and 'POSITION MANAGEMENT'. Below the navigation bar, the page title is 'Classifications / SPA'. A search bar is present with a 'Search' button and a link to 'More search options'. A table lists various classification job titles with columns for 'Classification Job Title', 'Classification Status', and 'Last Updated'. The row for 'SPA PA Test - 09/26' is highlighted in yellow. To the right of this row, the 'View Classification' button is circled in orange. Another 'Create New Classification' button is circled in orange at the top right of the table area.

Classification Job Title	Classification Status	Last Updated	Actions
Director of Facilities	Pending	May 14, 2010 at 05:56 PM	Actions
Test_Classification_QAAAA	Approved	September 24, 2014 at 03:22 AM	Actions
test	Approved	September 24, 2014 at 03:12 AM	Actions
<input checked="" type="checkbox"/> SPA PA Test - 09/26	Approved	September 26, 2014 at 06:01 AM	Actions
SPA Classification_1	Approved	September 29, 2014 at 01:45 AM	Actions
SPA Validation 1	Approved	October 10, 2014 at 06:26 PM	Actions
Accountant	Approved	May 14, 2010 at 05:56 PM	Actions
Accounting Manager	Approved	May 14, 2010 at 05:56 PM	Actions
Accounting Technician	Pending	December 05, 2014 at 02:13 PM	Actions
Administrative Support Assoc	Approved	May 14, 2010 at 05:56 PM	Actions
Administrative Support Spec	Approved	May 14, 2010 at 05:56 PM	Actions
Administrative Support Supv	Approved	May 14, 2010 at 05:56 PM	Actions

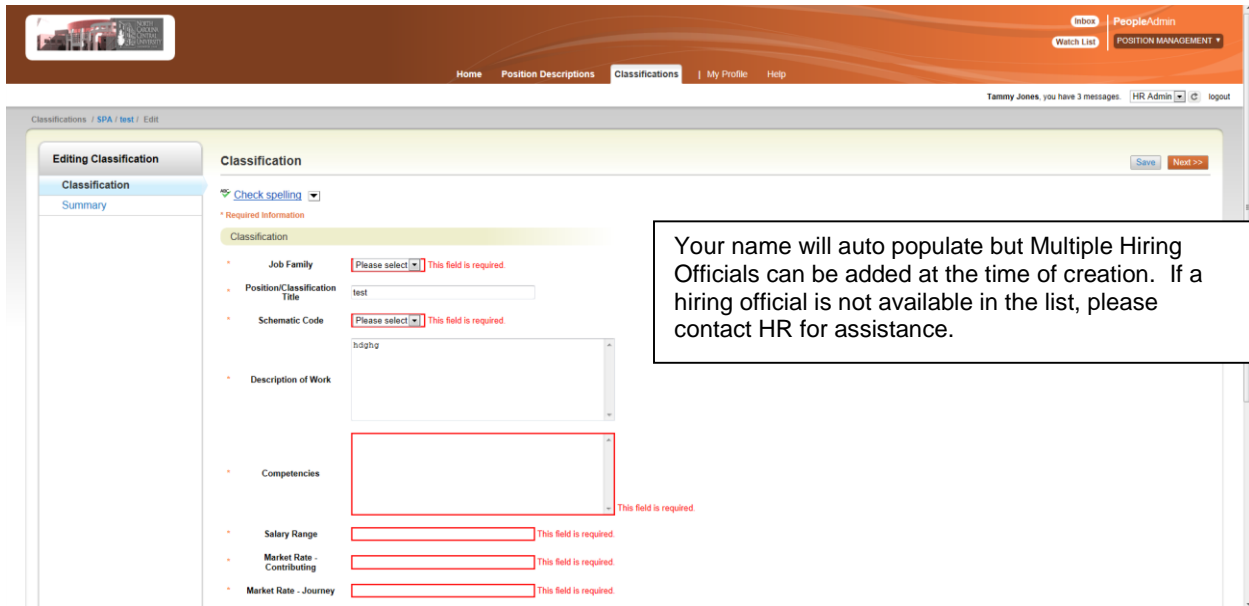
Click the radio button next to the selected Role Title and click the **Next >>** button in the top right corner to go to the **Position Details** tab. PeopleAdmin will auto save your work each time you click the next button.

This screenshot is identical to the one above, showing the PeopleAdmin SPA Classifications page. The 'Create New Classification' button is circled in orange. The table and other elements are the same as in the previous screenshot.



## Position Details

Complete all required information that did not default from Classification Details.



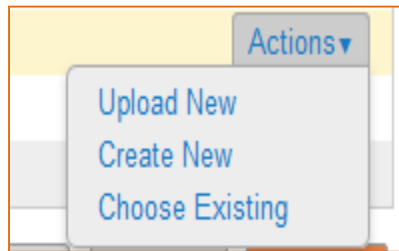
Use **Next >>** buttons to continue to the **Internal Documents Tab**.

## Internal Documents

Updated organization charts are required for all position actions. Other documents may also be attached, i.e., relevant memos, position budget justification, etc. To attach a document, hover the cursor over the **Actions** button next to the document type.

Document Type	Name	Status	(Actions)
Organizational Chart (Required)			Actions▼
Position/Budget Justification			Actions▼
Memorandum			Actions▼
Classification/Compensation Review Form			Actions▼

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



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

**Note:** Only the user that uploaded a document can remove the document. For positions requesting a full class/comp review with request for an in-band adjustment or pay raise, please complete the **Class/Comp Review Form** (available on the PeopleAdmin home page) and upload the completed document.

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.

Use [Next >>](#) buttons to continue the **Action Summary**.

## 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.

Classification: test (SPA) Edit

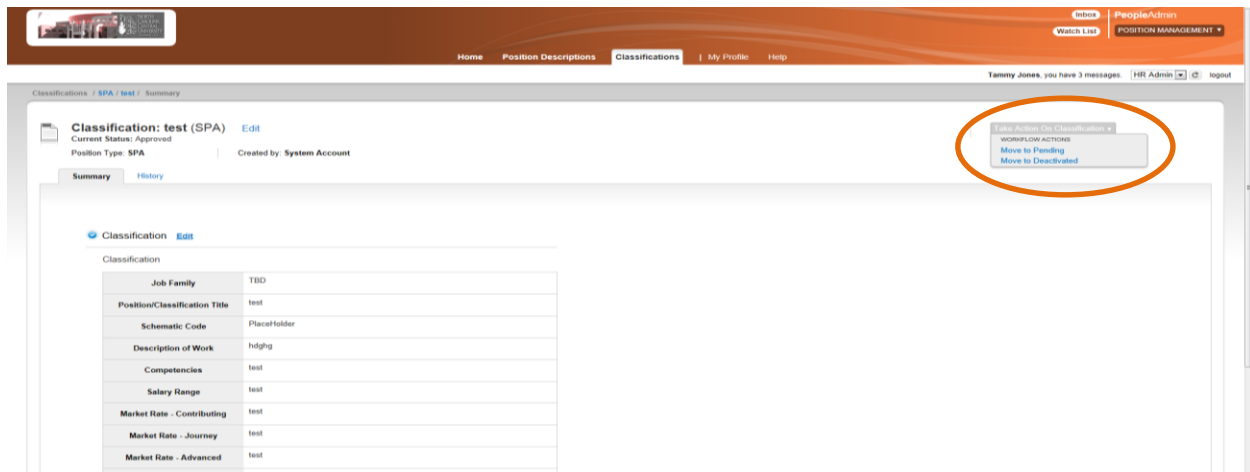
Current Status: Approved

Position Type: SPA Created by: System Account

Summary History

Classification	
Job Family	TBD
Position/Classification Title	test
Schematic Code	Placeholder
Description of Work	hdjgig
Competencies	test
Salary Range	test
Market Rate - Contributing	test
Market Rate - Journey	test
Market Rate - Advanced	test
Minimum Education/Experience	minlow

To initiate the approval queue, hover over the **Take Action On Action** button and choose 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** to move the action to the next stage of processing. **Do NOT click on an action in your Watch List to make changes after you have started routing the action for approval.**

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. Red error messages must be corrected before the action can transition to the the next step.

