Agenda

- General System Overview
  - Workflow
  - Scope, Permissions, and User Groups
  - Homepage Elements

- Position Management Module
  - Creating New Position Description
  - Modify Position Description

- Applicant Tracking Module
  - Creating Postings and Posting Workflow
  - Applicant Review
  - Hiring Proposal
Agenda (Cont.)

- 10:30 - 11:30
- 11:30 – 12:00 Question & Answer
PeopleAdmin 7
General System Overview

North Carolina Agricultural and Technical State University
General System Overview

- PeopleAdmin 7 is an industry-leading online position management and applicant tracking system tailored specifically for higher education
- Automates personnel actions related to position management, classification / compensation and recruitment / selection for permanent EPA and SPA positions
- Go Live: August 12, 2013
General System Overview

- Electronic routing of recruitment and position management actions through Division / School / College, Budget and DHR approval steps
- Allows supervisors access to position description information online
- Introduces online applicant tracking, review and hiring processes for permanent SPA, EPA, and Post Doctoral positions
- Search Committee feature allows for easy online access to and review / ranking of applicants by search committee members
How will current processes change?

- Position Management Module will replace:
  - PD 420 Position Action and Salary Increase Request Form
  - SPA Career Banding Position Description Form
  - ADA Checklist
  - EPA-2 Questionnaire for EPA Status Assessment Form
  - EPA Designation Request Form
  - PD-400 SPA Internal Salary Authorization Form (will be used for separations only).

- Applicant Tracking Module will replace:
  - PD-301 EPA / SPA Recruitment Form
  - PD-303 Recruitment Justification Form
  - PD-430 and PD-430a EPA and SPA Selection Document
  - PD-400 SPA Internal Salary Authorization Form (will be used for separations only).
Questions?
PeopleAdmin 7
Workflow

North Carolina Agricultural and Technical State University
# Position Management vs. Applicant Tracking

## Position Actions / Requests

<table>
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<tr>
<th>SPA, EPA, Post Doc</th>
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<td>Create New Positions</td>
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<td>Enter Position Details Prior to Posting</td>
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<td>Funding Source Changes / Extensions</td>
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## Recruitment Actions / Requests

<table>
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<tr>
<th>SPA, EPA, Post Doc, Temp</th>
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<tr>
<td>Posting Positions</td>
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<tr>
<td>Accepting Applications</td>
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<tr>
<td>Review Applications / Applicant Screening</td>
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<td>Candidate Approval</td>
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<tr>
<td>Fill Position</td>
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<td>Applicant Notifications</td>
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</table>
SPA Position Action Workflows

Position Management Module
Workflow is inclusive of all SPA position actions (Create New / Modify, Updates, Salary adjustments, etc)
SPA Posting Workflow

Applicant Tracking Module

SPA postings should be created from an approved Position Description. If a position description has not yet been entered into the system, please refer to and follow the SPA Position Action Workflow.
SPA Applicant Workflow

Applicant Tracking Module
Includes applicant review and ranking, as well as Search Committee functionality.

SPA: Applicants

Under Review by HR

Under Review by Dept/Committee (Applicant Reviewer)

Interview (Applicant Reviewer)

Vice Chancellor/Dean (Vice Chancellor/Dean)

EE Review (EEO)

Recommend for Hire (HR)

Hired

* Figure out plan for Agency recruitment involvement

Create an email (not automated) to recruiter, department, that immigration documentation is required

Auto-moves when hiring proposal is approved

emails HR, allows HR to initiate and complete hiring proposal

Not Selected for Interview (Recruitment)

Interviewed Not Hired (Recruitment)

System Del’td Did Not Meet Min Quals

Withdrawn

Position Canceled (HR)

Hiring Proposal Canceled (HR)

Always starts here

with reasons; sends email when posting is filed

with reasons; sends email when posting is filed

sends email immediately

sends email immediately

with reasons
SPA Hiring Proposal Workflow

Applicant Tracking Module
Used to submit recommended candidate for hire.
EPA Position Action Workflows

Position Management Module
Workflow is inclusive of all EPA position actions (Create New / Modify, Updates, Salary adjustments, etc)
EPA Posting Workflow
Applicant Tracking Module

EPA postings should be created from an approved Position Description. If a position description has not yet been entered into the system, please refer to and follow the EPA Modify Position Description Workflow.
EPA Applicant Workflow

Applicant Tracking Module
Includes applicant review and ranking, as well as Search Committee functionality.
EPA Hiring Proposal Workflow

Applicant Tracking Module
Used to submit recommended candidate for hire.
Post Doctoral Position Action Workflows

Position Management Module

Workflow is inclusive of all Post Doctoral position actions (Create New / Modify, Updates, Salary adjustments, etc)
Post Doctoral Posting Workflow
Applicant Tracking Module

Post Doctoral postings should be created from an approved Position Description. If a position description has not yet been entered into the system, please refer to and follow the Post Doctoral Modify Position Description Workflow.
Post Doctoral Applicant Workflow

Applicant Tracking Module
Includes applicant review and ranking, as well as Search Committee functionality.
Post Doctoral Hiring Proposal Workflow

Applicant Tracking Module

Used to submit recommended candidate for hire.
Questions?
PeopleAdmin 7
Scope, Permissions and User Groups

North Carolina Agricultural and Technical State University
Scope

- Scope helps define what a user will “see” within the System
- The most common levels of Scope available are:
  » Organizational
  » Division
  » Department
  » Personal
Permissions

Permissions control what type of actions you can complete

» Provost / Chancellor
» Division / College / School
» Department
» Section / Unit
User Group Examples

- Chancellor (Organizational Scope)
- Dean / Vice Chancellor (Division / College / School Scope)
- Department Head (Department Scope)
- Supervisor (Personal Scope)
- Human Resources (Organizational Scope)
- Budget and Planning (Organizational Scope)
- Contracts and Grants (Organizational Scope)
- EPA Budget (Organizational Scope)
Definitions: Permissions

- **Level 1 – Section / Unit:**
  - A Section or Unit that reports to a Department within a Division, College, or School
  - **Example:** In DHR, Temporary Employment (Section / Unit) reports to Staffing Services (Department), which reports to the Division of Human Resources
  - Not all departments will have a Section / Unit reporting to them.

- **Level 2 – Department:**
  - A Department within a Division, College, or School to which individual Sections / Units report
  - **Example:** Departments in the College of Arts and Sciences would include the Chemistry and English Departments, both of which report to the Dean’s Office
Definitions: Permissions

- **Level 3 – Division / College / School**
  - A Division, College, or School typically led by a Vice Chancellor or Dean to which individual departments report
  - **Examples:** The Division of Business and Finance, the School of Business and Economics, and the College of Engineering

- **Level 4 – Provost / Chancellor**
  - The Office of the Chancellor or the Office of the Provost, to which Divisions, Colleges, and Schools report
Definitions: User Groups

- **Supervisor**
  - Typically serve as “front-line” supervisors for a particular Section / Unit and typically would not have other supervisors reporting to them.
  - This level of access will allow the user to view, initiate, and approve actions **only** for positions directly reporting to them.

- **Department Head**
  - These individuals typically serve as Department Heads to which individual Section / Unit supervisors report.
  - This level of access will allow the user to view, initiate and approve actions for positions directly reporting to them, as well as for positions within each Section / Unit reporting to them.
Definitions: User Groups

- **Dean / Vice Chancellor:**
  - These individuals typically serve as Vice Chancellor of a division or Dean of a school or college
  - This level of access will allow the user to view, initiate and approve actions for positions directly reporting to them, as well as for all other positions within their Division, School, or College
Questions?
Home Page Elements

- https://ncat-training.peopleadmin.com/hr
- Username and password upon initial login is your e-mail prefix:
  - E-Mail Address: tlbutler@ncat.edu
  - Username: tlbutler
  - Password: tlbutler
Home Page Elements

- Upon initial login, you will be prompted to reset your password
- Password must be a minimum of 6 characters and contain at least three (3) of the following criteria:
  - One lowercase letter
  - One upper-case letter
  - One numerical digit
  - One special character (@,#,$,%, etc.)
Home Page Elements

- Alerts
- Inbox
- Watch List
- User Group Menu
- Module Menu
- Tabs
- Shortcuts and My Links
Questions?
Create New Position Description

- Timing of Budget Revisions
  - Review funding **PRIOR TO** initiating a Create New Position Description action and submit a budget revision if necessary to support the action

- SPA
- EPA
- Post Doctoral
Modify Position Description

- **IMPORTANT NOTE:** A Modify Position Description action must be completed prior to creating a posting for a position in PeopleAdmin for the first time
- **Timing of Budget Revisions**
  - Review funding **PRIOR TO** initiating a Modify Position Description action and submit a budget revision if necessary to support the action
- SPA
- EPA
- Post Doctoral
Questions?
PeopleAdmin 7
Applicant Tracking Module

North Carolina Agricultural and Technical State University
Create Posting

- Timing of Budget Revisions
  - Review funding \textit{PRIOR TO} initiating a Create New Posting action and submit a budget revision if necessary to support action

- SPA
- EPA
- Post Doctoral
Applicant Review

- Applying for a Position
- Screening
  - Searches – Default, custom, and saved searches
  - Applicant Reviewer User Group
- Review
  - Search Committee
  - Moving applicants in workflow
  - Evaluating applicants
  - Changing applicant statuses and updating non-selection reasons
- Selection
  - Recommend for Hire
  - EEO/AA Approval
Hiring Proposal

- Timing of Budget Revisions
  - Budget revision may be required prior to job offer if negotiated salary is higher than current budgeted amount

- Offer Accepted – Candidate Hired

- Offer Declined – Back to Applicant Review
Questions?
Coming Soon: Onboarding Module
Need Assistance?

- **User Guide URL:**
- Coming Soon - Tutorial Videos
- Contact DHR:

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<tr>
<th>Contact</th>
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<tbody>
<tr>
<td>Linc Butler</td>
<td>Assistant Vice Chancellor for HR</td>
<td>285-3770</td>
<td><a href="mailto:tlbutter@ncat.edu">tlbutter@ncat.edu</a></td>
</tr>
<tr>
<td>Lonnie Crotts</td>
<td>EPA Recruitment Coordinator</td>
<td>285-3777</td>
<td><a href="mailto:lmicrots@ncat.edu">lmicrots@ncat.edu</a></td>
</tr>
<tr>
<td>Amy Braun</td>
<td>Classification and Compensation Analyst</td>
<td>285-3791</td>
<td><a href="mailto:ambraun@ncat.edu">ambraun@ncat.edu</a></td>
</tr>
<tr>
<td>Sheila Eaves</td>
<td>SPA Recruitment Coordinator</td>
<td>285-3778</td>
<td><a href="mailto:saeaves@ncat.edu">saeaves@ncat.edu</a></td>
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Questions?