

# PEOPLEADMIN 7 USER GUIDE



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## HUMAN RESOURCES DEPARTMENT

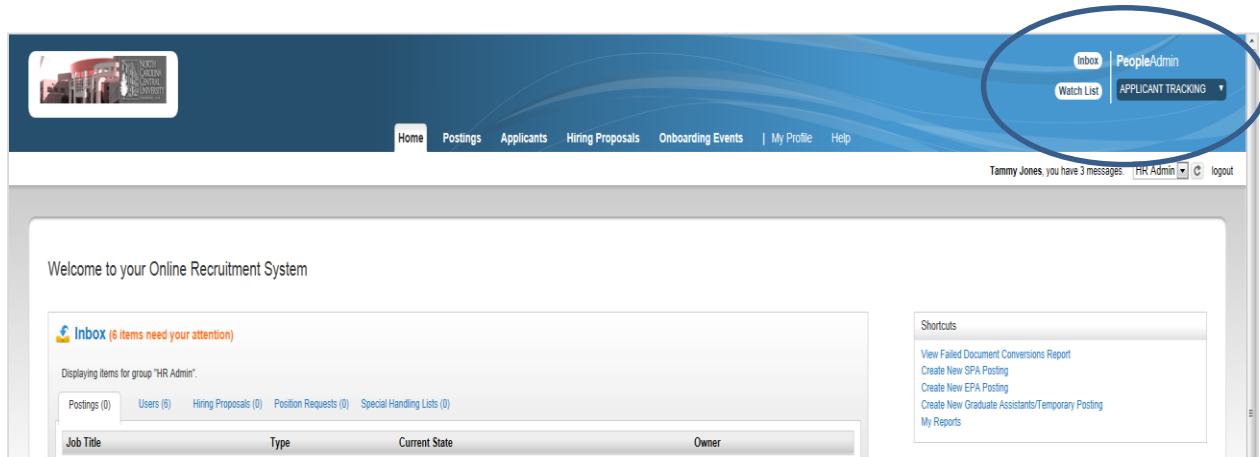
# Position Management Update/Reclassify an Existing Position

## MODULE IV

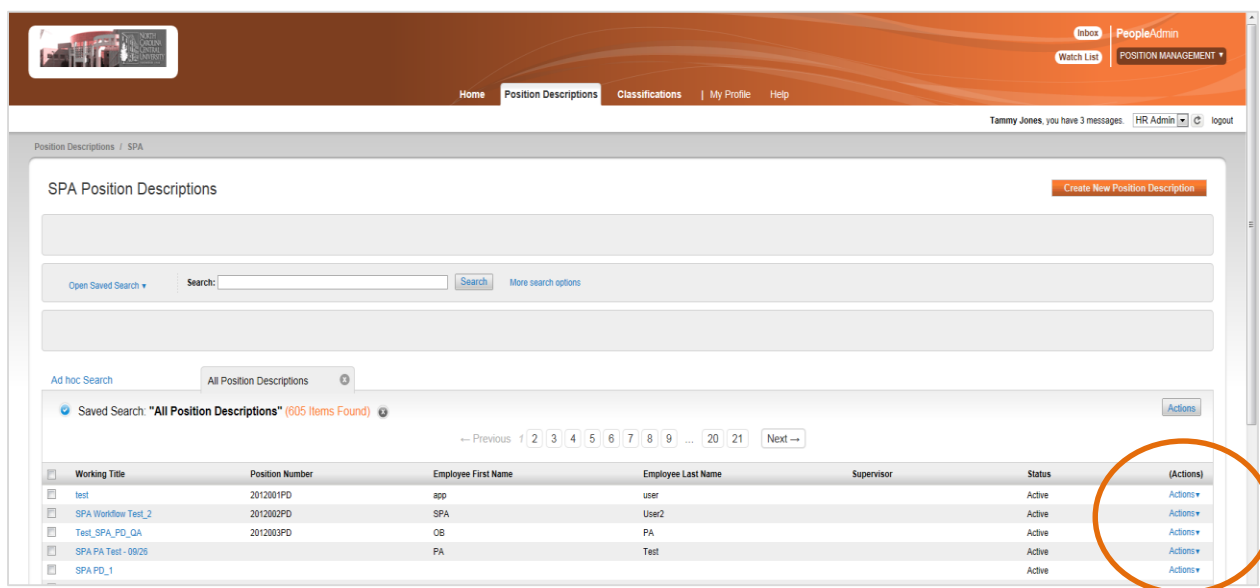
<b>Update/Reclassify An Existing Position</b>	Page 2
<b>Position Action Justification</b>	Page 3
<b>Classification Selection</b>	Page 4
<b>Employee</b>	Page 4
<b>Position Details</b>	Page 5
<b>Position Funding Information</b>	Page 5
<b>Job Duties</b>	Page 6
<b>ADA Checklist</b>	Page 6
<b>Supervisory Position</b>	Page 7
<b>Position Documents</b>	Page 7
<b>Summary</b>	Page 8

## Update/Reclassify an Existing Position

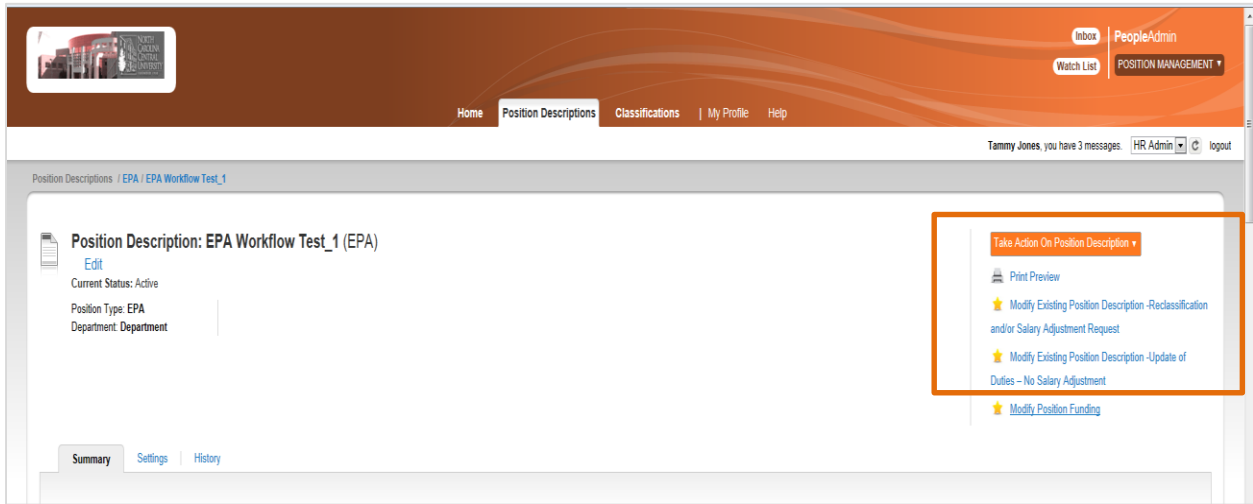
Login to PeopleAdmin at <https://jobs.nccu.edu/hr>. Select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen. The heading of page will turn to **orange**.



To start the process, hover over Position Description on the **Navigation Bar** and select the type of position to be updated or reclassified → SPA Position Request or EPA Position Request.



➡ Hover over the Action Link on the right of the position you want to modify then click on View. Click on the applicable action.



A confirmation screen will pop-up to notify you once you start this type of action, the position description will be locked from other updates. Click  to continue the process.



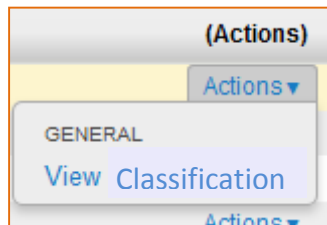
## Position Action Justification

## Classification Selection

To request a change in the Classification Title click the radio button next to the proposed Classification Title and click “View Classification”. **Note:** Classification Titles are determined based on a classification/compensation review by HR.

The screenshot shows the 'Classification Selection' page in the PeopleAdmin system. The left sidebar contains navigation options like 'Position Action Justif...', 'Classification Selection', 'Employee', 'Position Details', 'Position Funding Infor...', 'ADA Checklist Form', 'Analyst's Notes', 'Supervisory Position', 'Position Documents', and 'Position Request Summary'. The main content area is titled 'Classification Selection' and includes instructions on how to select a classification. Below the instructions is a table of classifications with columns for 'Classification Job Title', 'Classification Status', 'Last Updated', and 'Actions'. A search filter is applied, showing 'Saved Search: "EPA Classifications" (200 Items Found)'. The table lists various classification titles such as 'EPA PA Test - 0920', 'classification form GA', 'EPA Classification Test\_1', 'Chief Employment Officer Agency', 'Chancellor', 'VC Student Affairs & EM', 'Chief Legal Counsel', 'Vice Chancellor', 'Provost/Vice Chancellor', 'VC Finance and Administration', 'VC Institutional Advancement', 'VC Graduate Ed & Research', and 'Director of Library Services'. Each row has an 'Actions' column with a dropdown arrow.

To view the Classification Title hover over the Actions and choose “View Classification”.



## Employee

This tab provides information for the current employee in the position.

The screenshot shows the 'Employee' page in the PeopleAdmin system. The left sidebar is the same as in the previous screenshot, but the 'Employee' option is selected. The main content area is titled 'Employee' and includes a 'Vacate Position' button and a 'Details' section. The 'Details' section contains a table with the following information: First Name: Debra, Last Name: Parker, Work Email, and Employee ID: 820035622. Below the details is a search filter for 'Users - Filter these results' showing 'Saved Search: "user search" (7 Items Found)'. The table lists user groups with columns for 'User Group', 'Default Group', 'Status', 'Full Name', and 'Actions'. The table lists several employees, including 'Parker, Derrick', 'Parker, Debra', 'Parker, Sonya', 'Parker, Hadiyah', 'Parker, Freddie', 'Parker, Adia', and 'Parker, Evalie'.

Select the reason for the action under the Action Type by clicking in the check box. Any changes, including minor changes, will follow the process below.

Update the other fields as required or appropriate and use the next button to continue the position details tab.

**Note:** While in the Editing mode you can access a specific tab directly instead of by clicking on the tab name on the left side under Editing Action.

## Position Details

The current incumbent information will default under Position Details. Update the other fields as required and use the next button to continue to the Position Funding Information tab.

The screenshot shows the 'Position Details' tab in the PeopleAdmin system. The page title is 'Modify Existing Position Description -Reclassification and/or Salary Adjustment Request'. The left sidebar shows 'Editing Position Request' with 'Position Details' selected. The main content area has 'Position Details' and 'Employee Information' sections. Fields include Employee First Name (Debra), Employee Last Name (Parker), Banner ID (620035622), and Faculty Rank (Please select). There is also a 'Position Overview' section with a text area containing 'text'. Navigation buttons 'Save', 'Go Prev', and 'Next >>' are visible.

## Position Funding Information

Update the other fields as required and use the next button to continue to the ADA Checklist Form.

The screenshot shows the 'Position Funding Information' tab in the PeopleAdmin system. The page title is 'Modify Existing Position Description -Reclassification and/or Salary Adjustment Request'. The left sidebar shows 'Editing Position Request' with 'Position Funding Information' selected. The main content area has 'Position Funding Information' and 'Budget Summary' sections. A detailed instruction block is present above the 'Add Budget Summary Entry' button. Navigation buttons 'Save', 'Go Prev', and 'Next >>' are visible.

Position Requests / ... / Modify Existing Position Description -Reclassification and/or Salary Adjustment Request / EPA Workflow Test\_1 / Edit

**Editing Position Request**

- Position Action Justif...
- Classification Selection
- Employee
- Position Details
- Position Funding Infor...**
- ADA Checklist Form
- Analyst's Notes
- Supervisory Position
- Position Documents
- Position Request Summary

**Position Funding Information** [Save] [Prev] [Next >>]

Check spelling

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary if you are unsure of what fund to use, the most up to date information may be found in Banner Finance on these forms: 1) **FTVORGN**- Provides a list of Org Codes 2) **FTVPUND**- Provides a list of Funds 3) **FTYACCT**- Provides a list of Accounts These forms show listings of all active funds. For additional help, refer to the Banner Training Guide. If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

**Budget Summary**

\* Required Information

State Appropriated Funding/ Non-State Appropriated Funding [Please select]

If non-state, select source of funding [Please select]

If other, designate source

Is this position partially or fully funded on ARRA stimulus monies?

Fund

Org

Account

Program

Date Funds End

Annual Amount

Percentage of FTE

Remove Entry?

[Add Budget Summary Entry]

[Save] [Prev] [Next >>]

## Job Duties

Edit existing job duties. Additional duties may be added by clicking on [Add Job Duties Entry](#), duties may be deleted by checking the box next to "Remove Entry". Make sure the percentage adds to 100%. Use the [Next >>](#) buttons to continue the **ADA Checklist Form**.

**Editing Action**

- Classification Details
- Position Details
- Job Duties**
- Physical Demands
- Class/Comp Review
- Supervisory Position
- Budget Information
- Internal Documents
- Employee Details
- Action Summary

**Job Duties** [Save] [Prev] [Next >>]

Check spelling

\* Required Information

**Job Duties**

On this screen, please list in order of importance, and in detail, the job function and duties assigned to this position and estimate the percentage of time given to each function. To begin entering each individual duty, click the **Add Entry** button. Enter each percent of time and duty, and click the **Add Entry** button. Percentages must add up to 100%. You may copy and paste from another document. Do not include duties which constitute less than 5%. To a Job Duty click the **Add Entry** button below.

**Please Note:**

If this position supervises professional/operational/classified employees click here to copy and paste the standard [Performance Management Duty Link](#).

Percentage Of Time 40

Description

Perform and Provide General Cleaning Duties in Academic and Administration Buildings. Conduct Inspections. -Provide general cleaning duties within the academic, administration building zones in compliance with custodian route sheet schedules to ensure that areas within designated areas will be maintained at a 96% level of cleanliness daily.

Remove Entry?

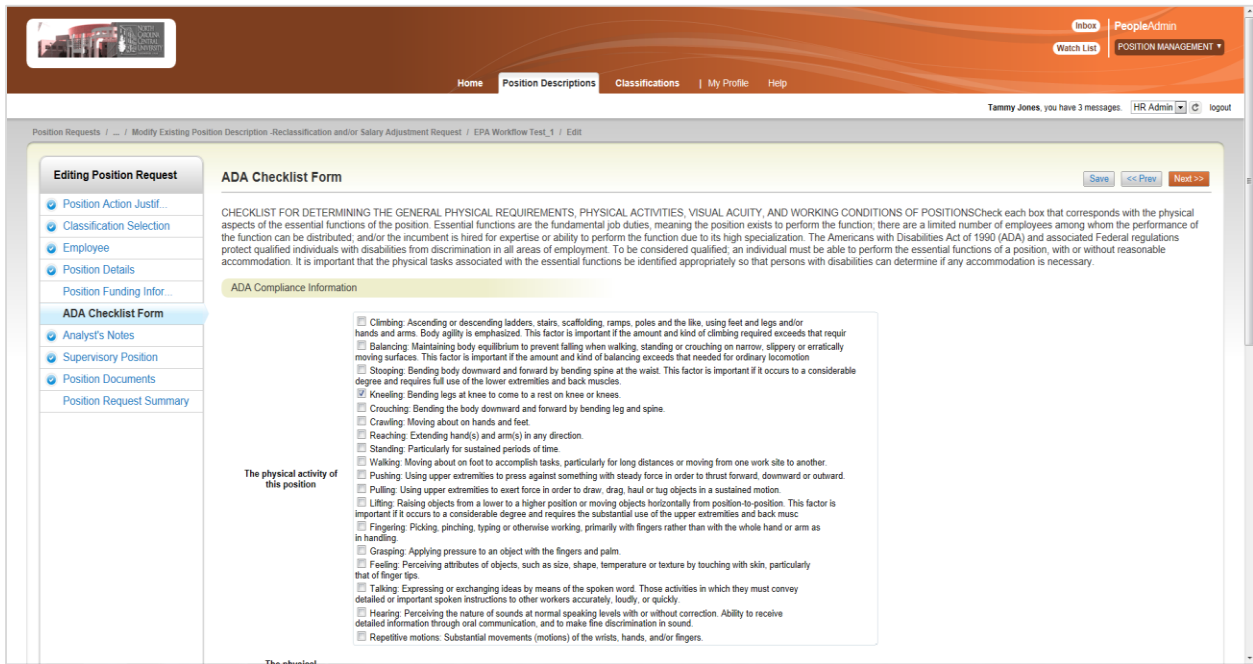
Percentage Of Time 10

Description

Job Training -Ensure staff is trained on proper procedures and guidelines related to housekeeping. -Ensure staff is trained on the correct use of equipment and chemicals.

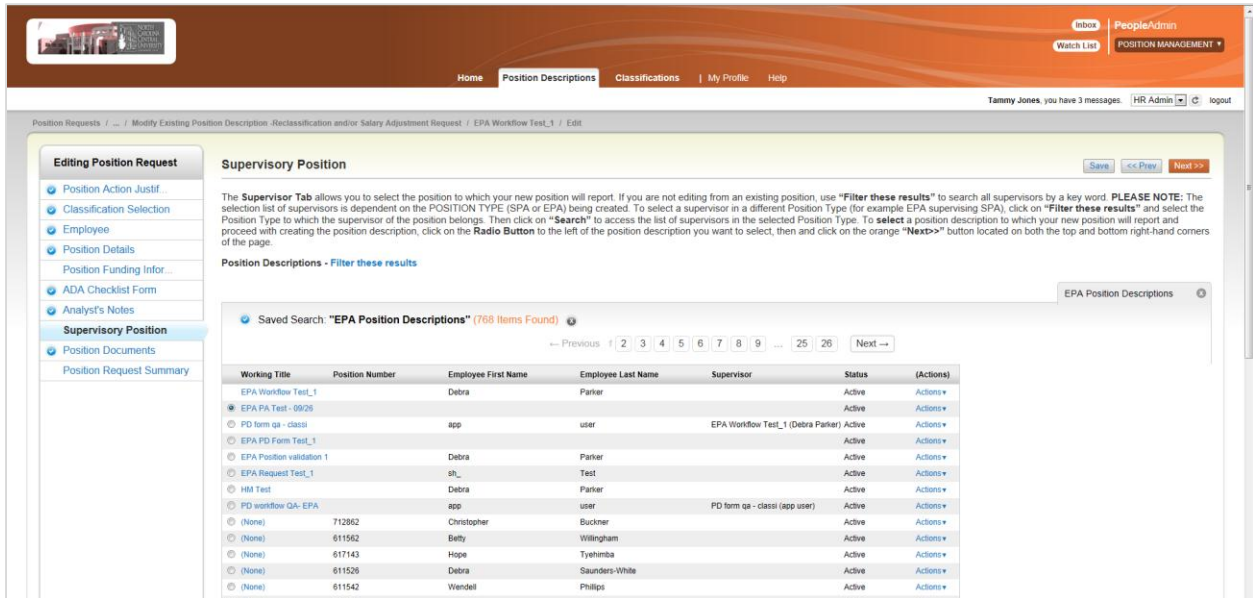
## ADA Checklist Form

Update the other files as required and use the next button to continue to the Analyst's Notes.



## Supervisory Position

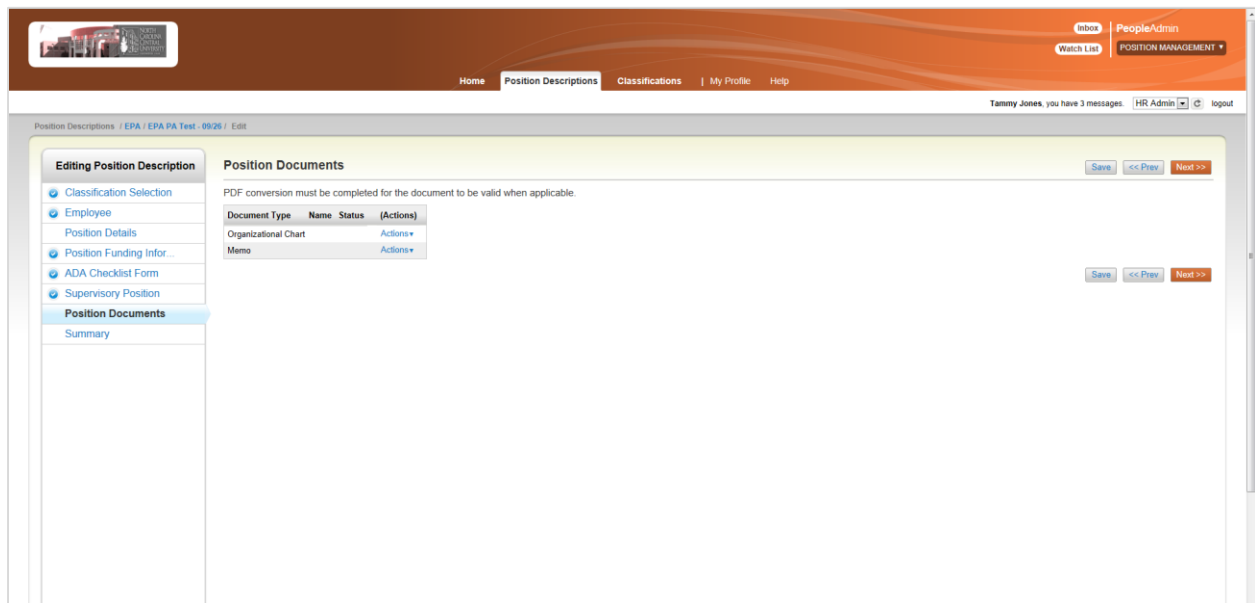
Update the other fields as required and use the next button to continue to the Position Documents tab.



## Position Documents

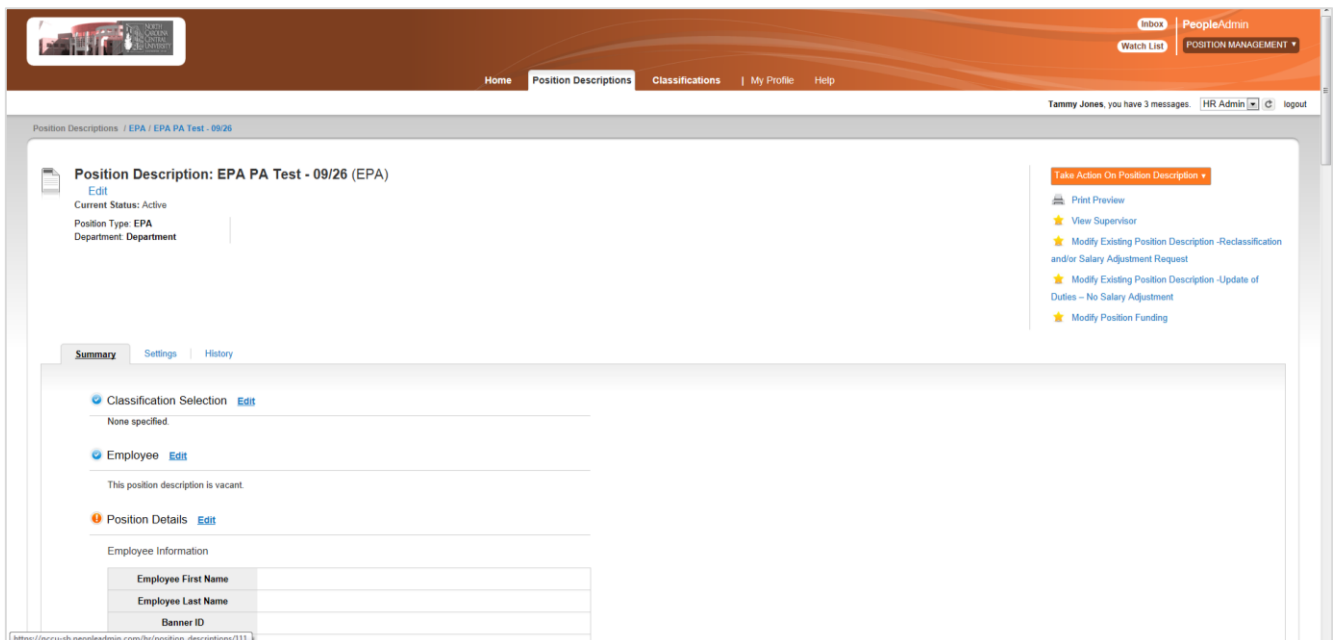
Updated organizational charts are required for all position actions. Documents may be attached, i.e., relevant memos, position budget justification, etc.

To attach a document, hover the cursor over the **Actions** button next to the document type.



## Summary

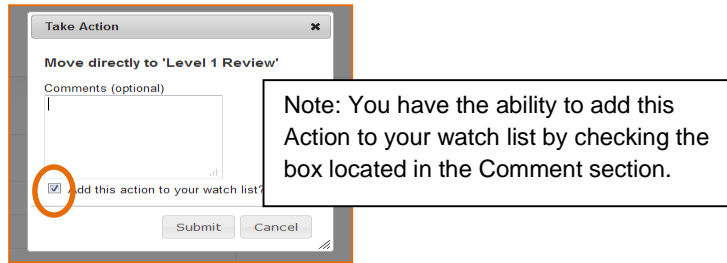
The Summary Tab provides the opportunity to review the position request and make any changes before submitting it for further approval. The overall Summary shows the Summary, History, and Settings (Posting Settings) in a tab view format.



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 that these comments will become part of the position record and cannot be removed.



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



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.



The screenshot shows the 'EPA Position Descriptions' page. At the top, a green notification banner reads 'Position Description was successfully updated.' The page has a navigation bar with 'Home', 'Position Descriptions', 'Classifications', 'My Profile', and 'Help'. Below the navigation bar, there is a search bar and a 'Create New Position Description' button. The main content area shows a table of position descriptions with columns for Working Title, Position Number, Employee First Name, Employee Last Name, Supervisor, and Status. The table is filtered by a saved search named 'EPA Position Descriptions' (768 Items Found). The table contains several rows of data, including entries for 'EPA Workflow Test\_1', 'EPA PA Test - 09/26', 'PD form qa - classi', 'EPA PD Form Test\_1', 'EPA Position validation 1', 'EPA Request Test\_1', 'HM Test', 'PD workflow QA- EPA', and several entries with '(None)' for the Working Title.

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				EPA Workflow Test_1 (Debra Parker)	Inactive	Actions
PD form qa - classi		app	user	EPA Workflow Test_1 (Debra Parker)	Active	Actions
EPA PD Form Test_1					Active	Actions
EPA Position validation 1		Debra	Parker		Active	Actions
EPA Request Test_1		sh_	Test		Active	Actions
HM Test		Debra	Parker		Active	Actions
PD workflow QA- EPA		app	user	PD form qa - classi (app user)	Active	Actions
(None)	712892	Christopher	Buckner		Active	Actions
(None)	611562	Betty	Willingham		Active	Actions
(None)	617143	Hope	Tyehimba		Active	Actions
(None)	611526	Debra	Saunders-White		Active	Actions