Quick Reference Guide To PeopleSoft

Section Links

HR - Posting and Hiring	Job Data Action	Time and Labor
Employee Information	Employee Data	Budget Amendment

CHECKING FOR OPENINGS/VACANCIES
(Using the Position Detail Report)

CLICK Organizational Development→Position Management→ Position Reports→PB Position Detail Reports

First time:
ENTER Your initials in the Run Control ID field
CLICK Add a new value

Next time:
ENTER Your initials in the Run Control ID field
CLICK Search

ENTER Dept (your department #)
Company = PBC

CLICK Run
OK
Process Monitor
Refresh (you're looking for Success/Posted)
Details
View Log/Trace
.PDF link

BROWSE JOB OPENINGS

CLICK Recruiting→Browse Job Openings→ Find Job Openings
Status field should be blank, or choose from the list.
Search
Job Opening link to view general details
Job Opening Details link to view/edit your opening

SEARCHING FOR APPLICANTS TO HIRE

CLICK Recruiting→Find Applicants

ENTER Applicant name

CLICK Applicant name to see the applicant's statuses/jobs in the Hiring process
Applicant Data link to view Application information

Note: this is not to be used as a replacement for training, but rather a quick reference to the processes.

ADVERTISE A POSITION

CLICK Recruiting→Create New Job Opening

ENTER Department

SELECT Job Family = Instructional, Non Instruct, or Admin

ENTER Position # (obtain from your Position Detail Report)

CLICK Continue

ENTER Recruiting Location – your school/dept # preceded by a '9'
Desired Start Date – (enter date)

Under Employee Being Replaced:
Name of the person leaving, if applicable, if known
Begin Date
End Date (only if temp job)

CLICK Qualifications (you want the applicant to possess) link

ENTER Highest level education preferred for this position
Yrs of work exp/degree/license/lang are optional, but recommended

CLICK Screening link
Load from Question Sets
Check the box associated with the job (Instr, Noninstr, Admin)
OK
Job Postings link
+ Add job postings

SELECT Internal and External (select *only* Internal if you want this to be seen only by current District employees)
Description Type = PB General All Postings Info
Description ID = PB General All Postings Info

CLICK + Add Posting Description

SELECT Internal and External (select *only* Internal if you want this to be seen only by current District employees)
Description Type = PB Instructional Guidelines (for Instructional postings)
-or- PB Administrative Guidelines (for Admin postings)
Description ID = PB Instructional Guidelines (for Instructional postings)
-or- PB Administrative Guidelines (for Admin postings)
Note: there is an interim posting description also – be sure to click the +Add Posting Description link for each additional one.

SELECT Destination = Intranet
Posting Type = External

CLICK + Add Posting Destination link

SELECT Destination = Intranet
Posting Type = Internal

CLICK OK
Save & Open –or-
Save as Draft (for Admin postings)

OFFER JOB TO AN APPLICANT
(Get their SSN and Date of Birth)

CLICK Recruiting→Find Applicant
Applicant's Name
+Add New Disposition link

CLICK The small arrow in the shaded box "Click Icon to Edit Disposition Details"

VERIFY
or
ENTER Job Opening ID (!!)

SELECT 070 OFFER EXTENDED from Status Code dropdown menu

ENTER Offer date in the Status Date field

CLICK Save
Return to Previous Page link

ENROLLING APPLICANT IN NEO

CLICK Enterprise Learning→Student Enrollment→Enroll in Course

SELECT Applicant (from Person Type field) or Employee

ENTER Applicant's Last Name

CLICK Search
Look Up Course Code Button (ALT+5)

SELECT NEO (from Course Code field)

CLICK Look Up Session # (ALT+5)

SELECT Session # based on when they can attend NEO (choose a session that is **not** filled to capacity)

CLICK *Attendance list

SELECT Enrolled

CLICK Save

PRINTING OFFER LETTER

CLICK Recruiting→Offer Letter

ENTER Run Control ID (Your Initials)

CLICK Search

SELECT Applicant ID (use magnifying glass icon)
Job Opening ID

CLICK Run
OK
Process Monitor link (make note of process #)
Refresh (until you see success/posted)
Details link
View Log/Trace link
.PDF file
Print

If it does not print information, go back and make sure the person Applied, you entered the Offer status, you enrolled them in NEO, you entered a Job Opening ID

Note: this is not to be used as a replacement for training, but rather a quick reference to the processes.

"IN HOUSE MOVE" JOB DATA ACTION (NO CHANGE IN SALARY)

CLICK	Workforce Administration→Job Information→Job Data
ENTER	Enter EMPLID or Employee's last name
CLICK	Include History
CLICK	Search - Job Data page will appear if employee only has one job
CLICK	EMPL RCD - start with 0 record which is usually the primary job, all other records are secondary jobs
CLICK	Add a row
ENTER	Effective Date of In House Move Verify sequence number tied to effective date
ENTER	Action /Reason Combination: Transfer/In House Move
ENTER	Position Number and press TAB
CLICK	Job Information Tab
VERIFY	Employee Class; update if incorrect.
VERIFY	Classified Indicator, Regular/Temporary, Full/Part, Standard Hours, Work Period or FTE are correct. If incorrect, **STOP** and contact your budget department contact person. Once fixed, begin again.
CLICK	SAVE
Remember…	When you add a new row, the previous row's information is carried into the new row, along with the current date. Review each field and make all appropriate changes.

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"TERMINATION" JOB DATA ACTION

>>MAKE SURE EXIT FORM (PBSD0936) IS COMPLETED<<

CLICK	Workforce Administration→Job Information→Job Data
ENTER	Enter EMPLID or Employee's last name
CLICK	Include History
CLICK	Search - Job Data page will appear if employee only has one job
CLICK	EMPL RCD - start with 0 record, which is usually the primary job; all other records are secondary jobs
CLICK	Add a row
ENTER	Effective Date of Termination – Day after last day worked. Verify sequence tied to effective date
ENTER	Action /Reason Combination: Termination/(Select Reason from drop down menu)
CLICK	SAVE
CLICK	"YES" for Teachers/Assistant Principals if message asks to end contract.
Remember…	When you add a new row, the previous row's information is carried into the new row, along with the current date. Review each field and make all appropriate changes.

"RETURN FROM LEAVE" JOB DATA ACTION

CLICK Workforce Administration→Job Information→Job Data

ENTER Enter EMPLID or Employee's last name

CLICK Include History

CLICK Search - Job Data page will appear if employee only has one job

CLICK EMPL RCD - start with 0 record which is usually the primary job, all other records are secondary jobs

CLICK Add a row

ENTER Effective Date of Job Action
Verify sequence tied to effective date

ENTER Action /Reason Combination: Return from Leave/Return From Leave

VERIFY Position Number – If change is necessary then:

ENTER Position Number and press Tab

CLICK Job Information Tab

VERIFY Employee Class; update if incorrect.

VERIFY Classified Indicator, Regular/Temporary, Full/Part, Standard Hours, Work Period or FTE are correct. If incorrect, **STOP** and contact your budget department contact person. Once fixed, begin again.

CLICK Payroll Tab

ENTER Pay Group, Employee Type, Holiday Schedule (if it does not default from position) Refer Job Aid entitled, "Job Data Reference Guide".

VALIDATE Time and Labor enrollment

CLICK Employment Date Link

CLICK Time Reporter Link

VIEW If enrolled and no change in work group – no action needed or else . . .

If not enrolled:

ENTER Payable Status Date (same as return from leave date)

ENTER Effective Date (same as return from leave date)

ENTER Time Reporter Type (see chart)

ASSIGN Workgroup

ASSIGN Task Group (Always select "Generic")

CLICK Benefits Program Participation Link

VALIDATE If enrolled and there is no change, no action is needed or
else . . .

CLICK Add a new row

ENTER Effective Date of Return from Leave

CLICK Look Up

CLICK Appropriate Benefit Program

CLICK SAVE

WORK GROUP TABLE:

UNION CODE	DUTY DAYS	JOBCODE	WORKGROUP
02A			AESOP
04B			NCF&O-B
04D			NCF&O-D
04F			NCF&O-F
01T	<250		PBCTA
01T	250		YR_TCHR
05I			NONBARG-I
05P			NONBARG-P
08C			NONBARG-C
08M			NONBARG-M
08S		All except 70400, 70670, 70610, 70870	NONBARG-S
08S		Only 70400, 70670, 70610, 70870	SR MGMT
06G			PBG-R
06R			PBG-G
00Z		All except 50150	TEMPS
00Z		50150	SUB_TCHR

Remember…When you add a new row, the previous row's information is carried into the new row, along with the current date. Review each field and make all appropriate changes.

ADD ADDITIONAL JOB

CLICK Workforce Administration→Job Information→Add Additional Assignment

ENTER Enter EMPLID or Employee's last name

CLICK Search

CLICK CREATE ASSIGNMENT button (next available EMPL REC # is automatically displayed)

ENTER Effective Date

ENTER Action /Reason Combination: Additional Job/Additional Job

ENTER Position Number and press Tab

CLICK Calculate Status and Date button (upper right)

CLICK Job Information Tab

ENTER EMPL class using the drop down list

VERIFY Classified Indicator, Regular/Temporary, Full/Part, Standard Hours, Work Period or FTE are correct.

CLICK Payroll Tab

ENTER Pay Group, Employee Type
Holiday Schedule (if it does not default from position) using look up icon

CLICK Compensation Tab

CLICK Default Pay Component button

CLICK Calculate Compensation button

For teacher or AP's only …. If the "Choose Proration for Contract Change" message is displayed, click "OK" (Compensation will verify this.)

CLICK Employment Data Link

CLICK Time Reporter Link

ENTER Effective Date

SELECT Time Reporter Type (see chart)

ASSIGN Workgroup

ASSIGN Task Group

CLICK OK

CLICK OK

CLICK REFRESH button (the newly added additional assignment is displayed at the bottom of the page)

WORK GROUP TABLE:

UNION CODE	DUTY DAYS	JOBCODE	WORKGROUP
02A			AESOP
04B			NCF&O-B
04D			NCF&O-D
04F			NCF&O-F
01T	<250		PBCTA
01T	250		YR_TCHR
05I			NONBARG-I
05P			NONBARG-P
08C			NONBARG-C
08M			NONBARG-M
08S		All except 70400, 70670, 70610, 70870	NONBARG-S
08S		Only 70400, 70670, 70610, 70870	SR MGMT
06G			PBG-R
06R			PBG-G
00Z		All except 50150	TEMPS
00Z		50150	SUB_TCHR

ENTER EXCEPTION TIME (absences and/or additional hours worked)		ENTER TIME FOR INTERNAL BILLING (Charging outside of regular funding)	
CLICK	Manager Self Service→Time Management→Report Time→Timesheet	CLICK	Time and Labor→Report Time→Rapid Time
CLICK	EmplID # or Group ID	CLICK	Add a new session
CLICK	Get Employees Button	ACCEPT	Defaults (template type and add/replace)
CLICK	Name of Employee (scroll down)	ENTER	Description (Subs/payperiod begin/end dates)
CLICK	View by Field and SELECT Time Period (on the elapsed timesheet)	CLICK	Rapid Time Template spyglass
CLICK	Date Field and ENTER pay period begin date	SELECT	ELAPSED
CLICK	Refresh	CLICK	EmplID – enter #
CLICK	Apply Schedule	TAB	Empl Rcd – enter # (or choose default of "0")
CLICK	Time Reporting Code dropdown and select REG	TAB	Enter date
CLICK	Enter hours in each box under the appropriate date (On the second row)	TAB	Select Time Reporting Code (LSE, etc)
CLICK	Time Reporting Code dropdown and select TRC	TAB	Enter quantity (number of hours) (enter a row for regular hours if it is a workday)
CLICK	+ to add additional rows, if necessary	TAB	Select Billable Indicator "Y"
REPEAT	As needed	TAB	Enter Comments (weekly service, etc)
CLICK	Submit	TAB	Enter PC Business Unit (SDPBC)
		TAB	Enter Project ID (see job aide)
		TAB	Enter Activity ID (PAYROLL)
		TAB	Enter Combo Code (see job aide)
		ADD	Rows as necessary/copy down/increment date
		CLICK	Submit
		WRITE	Session # (used for a query)
		CLICK	OK

ENTER TIME FOR TEMPS
(all regular hours)

CLICK	Manager Self Service→Time Management→ Report Time→Timesheet
CLICK	EmplID # or Group ID
CLICK	Get Employees Button
CLICK	Name of Employee (scroll down)
CLICK	View by Field and SELECT Time Period (on the elapsed timesheet)
CLICK	Date Field and ENTER pay period begin date
CLICK	Refresh
CLICK	Enter hours in each box under the appropriate date (use TAB to scroll across)
CLICK	Time Reporting Code dropdown and select Time reporting code (RGR)

ENTER TIME FOR SUBS
(all regular hours)

CLICK	Time and Labor→Report Time→Rapid Time
CLICK	Add a new session
ACCEPT	Defaults (template type and add/replace)
ENTER	Description (Subs/payperiod begin/end dates)
CLICK	Rapid Time Template spyglass
SELECT	ELAPSED
CLICK	EmplID – enter #
TAB	Empl Rcd – enter # (or choose default of "0")
TAB	Enter date
TAB	Select Time Reporting Code (TRC)
TAB	Enter quantity (number of hours)
TAB	Across to Combo Code field
ENTER	Combo Code (dept#SUB1000-XXXX-XXXX)
ADD	Rows as necessary/copy down/increment date
CLICK	Submit
WRITE	Session # (used for a query)
CLICK	OK

REVIEW EXCEPTIONS

CLICK	Manager Self Service→Time Management→Approve Time And Exceptions→Exceptions
ENTER	Group ID (Dept #)
CLICK	Get Employees
VIEW	For message 'there are no employees found' no further Action is needed. If employees are listed, call your Payroll Contact for resolution.

APPROVING TIME

CLICK	Manager Self Service→Time Management→ Approve Time and Exceptions→ Payable Time
ENTER	Group ID (Dept #) for school/dept employees
ENTER	Begin and End dates of pay period
CLICK	Get Employees
CLICK	View All link
CLICK	Select All link
CLICK	Approve

Repeat all steps for substitutes:

ENTER	EmplID for Subs
ENTER	Begin and End dates of pay period
CLICK	Get Employees
CLICK	View employee time
CLICK	Select dates worked at school by Checking the box by the date
CLICK	Approve

TIPS ON RUNNING A PAYABLE STATUS REPORT

CLICK Time and Labor → Reports → Payable Status

ENTER Group ID #

CHANGE Pay Period begin and end dates

Before your time has been approved, run a Payable Status report and check off the following criteria:

Needs Approvals

Rejected

After your time has been approved, run a Payable Status report and check off the following criteria:

Approved

Closed

Taken by Payroll

Rejected

After payroll runs and the screens are reopened, run a Payable Status report and check off the following criteria:

Paid

EMPLOYEE INFORMATION

VIEW EMPLOYEE'S BENEFITS

CLICK	Benefits → Review Employee Benefits → Benefits Summary (w/pay dedns)
ENTER	EmplID
CLICK	Search
VIEW	Benefits Summary

VIEW EMPLOYEE'S LEAVE BALANCES

CLICK	Benefits → Manage Leave Accruals
CLICK	PB Review Credited Leave Accruals or PB Review Earned Leave Accruals
ENTER	EmplID
CLICK	Search

RUN BIRTHDAY REPORTS

CLICK	Workforce Administration → Personal Information → Biographical → Birthday Reports
CLICK	Search to find Existing Value
CLICK	Add A New Value if a value doesn't exist
ENTER	Run Control ID – Birthdays
CLICK	Run
CLICK	Process Monitor
CLICK	Refresh until process shows a status of Success and Posted
CLICK	Details
CLICK	View Log/Trace
CLICK	.pdf Link
SAVE	
PRINT	

VIEW EMPLOYEE PAYCHECK

CLICK	Payroll for North America → Payroll Processing USA → Produce Payroll → Review Paycheck Summary
ENTER	EmplID or Last Name
CLICK	Search
CLICK	Arrows for Earnings, Deductions, Taxes for Info

CHANGE A CURRENT EMPLOYEE'S BIOGRAPHICAL DATA (address, phone number, etc.)

CLICK Workforce Administration → Personal Information → Biographical → Modify a Person

ENTER EmplID#

CLICK Search

VIEW Contact Information

TO MODIFY EXISTING HOME ADDRESS

CLICK View address Detail for address type

CLICK Add a New Row Icon (+)

ENTER NEW EFFECTIVE DATE IN THE **ADDRESS HISTORY** PAGE

CLICK Add Address

ENTER New address information

CLICK OK

CLICK OK

TO ADD A NEW ADDRESS TYPE

ON THE CONTACT INFORMATION PAGE

CLICK Add a new row icon

SELECT Address type from drop down

CLICK Add Address Detail

CLICK Effective date and adjust

ENTER Country

CLICK Add Address

ENTER Address information

CLICK OK to save Edit Address page

CLICK SAVE on the Contact Information page

TO ADD/MODIFY PHONE INFORMATION

ON THE CONTACT INFORMATION PAGE

CLICK Add a New Row Icon

SELECT Phone Type from drop down list (if phone type already exists, modify current information)

ENTER Phone number and extension (if applicable)

CLICK Preferred (if main contact number)

CLICK SAVE on the contact information page

TO ADD/MODIFY EMAIL INFORMATION

ON THE CONTACT INFORMATION PAGE

CLI CK Add a new row icon (if email type already exists, modify current information)

SELECT Email type

ENTER Email address

CLICK Preferred (if applicable)

CLICK SAVE on the Contact Information page

ADDING/UPDATING EMERGENCY CONTACT INFORMATION

CLICK Workforce Administration → Personal Information → Personal Relationship → Emergency Contact

ENTER EMPLID# (or last name)

CLICK Search Button

ENTER Contact Name in the field

CLICK Relationship to Employee

SELECT Value

CHECK Primary Contact

CLICK Edit Address Link

ENTER Address information

CLICK OK Button

CLICK Other Phone Number tab (next to Contact Address/Phone)

SELECT Phone Type from list

ENTER Phone number

CLICK SAVE

RUNNING AN EMERGENCY CONTACT REPORT

CLICK Workforce Administration → Personal Information → Personal Relationship → Emergency Contact Report

ENTER Run Control ID (EMG_Contact or whatever you want to name this report)

CLICK Add a new value tab

CLICK ADD Button

CLICK RUN Button

CLICK OK Button

NOTE Process Instance Number (PIN)

CLICK Process Monitor Link

CLICK REFRESH UNTIL
Run Status = SUCCESS
Distribution Status = POSTED

CLICK DETAILS Link

CLICK VIEW LOG/TRACE Link

CLICK .pdf FILE LINK
(match PIN from above)

VIEW

PRINT (IF NECESSARY)

VIEW HONORS AND AWARDS

CLICK	Workforce Development → Competency Management → Track Person Competencies → Honors and Awards
ENTER	EmplID or last name
CLICK	Search
VIEW	Honors and Awards

VIEW LICENSES AND CERTIFICATIONS

CLICK	Workforce Development → Competency Management → Track Person Competencies → Licenses and Certifications
ENTER	EmplID or last name
CLICK	Search
VIEW	Licenses and Certifications

VIEW PALM BEACH LICENSE, CERTIFICATIONS, OUT OF FIELD, SUPPORT PROGRAM INFO

CLICK	Workforce Development → Competency Management → Track Person Competencies → PB Licenses and Certifications
ENTER	EmplID or last name
CLICK	Search
VIEW	PB Out-of-field info, etc.

VIEW TEST RESULTS

CLICK	Workforce Development → Competency Management → Track Person Competencies → Test Results
ENTER	EmplID or last name
CLICK	Search
VIEW	Test Results

BUDGET AMENDMENT

CREATING A BUDGET AMENDMENT

CLICK	Commitment Control→Budget Journals→ Enter Budget Transfers
CLICK	Add
CLICK	in the Ledger Group field
ENTER	DETAIL
TAB	to Parent Budget Entry Type
SELECT	Transfer Adjustment from drop down menu
CLICK	in the Long Description field
ENTER	a meaningful description
CLICK	on the Budget Lines tab
CLICK	in the Budget Period field
ENTER	2007 for FY '07
TAB	to the Dept field
ENTER	your dept or school number
TAB	to the Fund field
ENTER	correct Fund information
TAB	to the Function field
ENTER	the correct Function information
TAB	to the Account field
ENTER	the correct Account information
TAB	to the Program field
ENTER	correct Program information
TAB	to the Bud Mgr field
ENTER	the correct Bud Mgr information
TAB	to the Local Code field
ENTER	the correct Local Code information
TAB	to the Amount field
ENTER	the amount you would like to transfer **out** of this funding strip as a negative number (i.e. -500)
CLICK	on the Insert Lines button (all fields will copy down except the Account field)
TAB	to the Account field
ENTER	the correct Account information
TAB	to the Amount field
ENTER	the amount you would like to transfer **into** this funding strip as a positive number (i.e. 500) This entry must be balanced.
CLICK	SAVE
CLICK	PROCESS
CLICK	YES (this will post the journal entry and complete the budget transfer)