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# Table of Contents

**PeopleSoft 101** ........................................................................................................................................... 1

**What is PeopleSoft?** .................................................................................................................................... 3
  PeopleSoft at the U of A ................................................................................................................................. 4
  PeopleSoft Modules and Areas of Responsibility ......................................................................................... 9

**PeopleSoft Access and Navigation** .......................................................................................................... 14
  Obtaining Access to PeopleSoft .................................................................................................................... 15
  Signing In to PeopleSoft ................................................................................................................................. 20
  Navigating PeopleSoft - Common Features ............................................................................................... 26
  Understanding the Favorites Menu .................................................................................................................. 39
  Searching and Retrieving Data in PeopleSoft .............................................................................................. 53
  Using a Search to Retrieve Data .................................................................................................................... 55

**PeopleSoft Reporting** .............................................................................................................................. 60
  Running a PeopleSoft Query .......................................................................................................................... 61
  Creating a New Run Control ID ....................................................................................................................... 69
PeopleSoft 101

Audience

All University of Alberta employees using PeopleSoft regardless of which application being used.

Overview

This session will provide an introduction to the three PeopleSoft applications used to manage finances, human resources, and student administration at the University of Alberta. You will learn how the applications are used at the U of A and their relationship to each other, be able to perform basic navigation functions, use standard data retrieval tools common to all applications, and understand PeopleSoft reporting at a high level.

This session is intended to provide the foundation upon which you can build your PeopleSoft knowledge and skills in the business context of your specific job.

(All references to U of A in this training guide refer to the University of Alberta)

Objectives

This module will cover:

- What is PeopleSoft and How it is used at the U of A
- PeopleSoft Access and Navigation
- PeopleSoft Reporting

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.
What is PeopleSoft?

Overview

This section will provide an understanding of the three PeopleSoft applications used by the University of Alberta, how the applications are used and their relationship to each other.

Objectives

Upon completion of this section you will have a general understanding of:

- The 3 PeopleSoft Applications used at the U of A
- The Relationship between the PeopleSoft Applications
- The PeopleSoft Modules and Areas of Responsibility

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.

PeopleSoft at the U of A

In this topic you will be introduced to the three PeopleSoft applications used to manage finances, human resources, and student administration at the University of Alberta.
To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

1. **PeopleSoft** is a web-based application designed to help users perform, track, validate, and verify specific tasks or transactions using delivered tools.
2. The University of Alberta is currently using three PeopleSoft applications:

**Campus Solutions (CS)**
Used to track information regarding student administration, e.g. course enrollment, course planning and scheduling, and undergraduate award management.

**Human Capital Management (HCM)**
Used to track employee information, e.g. pay, benefits.

**Financials**
Used to track financial transactions, e.g. expenditures, revenues.

3. PeopleSoft sometimes **shares data** between applications and modules.

   This sharing of data among the applications eliminates redundant data entry and allows enhanced data availability and reporting capabilities.
4. For example, one commonly shared table is the Personal Data Table containing a Person ID.

Person ID’s are created in Campus Solutions and share the Personal Data Table with Human Capital Management in real time. This means that information added and saved within Campus Solutions will immediately be available in Human Capital Management to view.

The Financials application also uses the Personal Data Table. However in this case, the data is updated nightly via a file that is extracted from Human Capital Management and Campus Solutions and then loaded into Financials.

5. Entering data in one application may impact the other applications.

Therefore it is important to follow all processes correctly to ensure the integrity of the data.
6. PeopleSoft applications use an Oracle database to store data.

Oracle is a **Relational Database**, which means that similar types of data are stored in tables that can be linked to each other for cross-referencing.

Each table contains rows and columns. Rows represent a unique collection of data and the columns specify attributes related to the row.

In order to retrieve information, the software uses specific keys or fields that are common on each table to pull information together. As a rule, these fields should be a static type of data. For example, a person’s name is more static than their address.

7. The tables shown provides an example as to how a Relational Database works.

The Personal Data Table and the Address Table have the Employee ID. Therefore oracle can pull relevant information from both of these tables such as the Employee’s Name and Address that are linked to the Employee ID.
8. **Menu Labels**
Some of the menu items in the PeopleSoft applications may have different labels but the underlying data comes from the same source.

For example, in Human Capital Management, information related to a job (e.g. person ID, department, active status) is located under the heading **Workforce Administration**; whereas in Financials, portions of this information exist under the heading **Employee Profile**.

9. Continue on to the next topic to learn more about the modules used with the PeopleSoft Applications and the key areas responsible for these modules.

10. Congratulations! You have completed the training on how PeopleSoft is used at the University of Alberta.

    **End of Procedure.**

---

**PeopleSoft Modules and Areas of Responsibility**

In this topic you will be introduced to the modules used within the PeopleSoft applications and the key areas that are responsible for maintaining the integrity of PeopleSoft Data, ensuring processes and procedures are being followed correctly, and providing support for networks and database availability.

---

**To Begin the Online Tutorial:**

- Click the button located in the top left of the screen and follow the instructions provided.
1. **PeopleSoft Modules**

PeopleSoft applications are very large and complex so their various programs and processes have been organized into modules. These modules are comprised of organized business activities and programs to handle specific tasks within each application.

![Diagram of PeopleSoft modules]

2. The diagram provided illustrates each PeopleSoft application and its related modules currently in use at the University of Alberta.

For details on the various modules, refer to Appendix B – PS Modules Explained at the end of the Learning Guide.

WA - Need to determine where these details should reside.
3. **Areas of Responsibility**

The availability and reliability of data in PeopleSoft is critical to daily operations on campus. Key areas have been defined and are responsible for maintaining the integrity of the data, ensuring processes and procedures are being followed correctly, and for providing support for networks and database availability.

4. **PeopleSoft Financials**

*Financial Services (FS):*  
Responsible for overall financial transactions. Manages the integrity of all PeopleSoft Financials modules, financial reports, chart of accounts, and inter-module balances.

*Supply Management Services (SMS):*  
Responsible for the procurement of goods or services and the payment of supplier invoices.

*Research Services Office (RSO):*  
Responsible for processing research applications and awards and for managing research projects and institutional awards.
5. **Human Capital Management (HCM)**

   **Human Resource Services (HRS):**
   Responsible for managing payroll, benefits and pension transactions, employee history, and time and leave tracking.

6. **Campus Solutions**

   **Office of the Registrar and Student Awards (RO):**
   Responsible for managing the University’s student record system, recruiting students, processing applications and evaluating credentials, and for maintaining an accurate and complete record of each student's academic progress. This area is also responsible for administering, promoting and disbursing scholarships, creating timetables and exam schedules, and for providing official transcripts and certification of these records.

   **Faculty of Grad Studies and Research (FGSR):**
   Responsible for managing the University's graduate student records system, recruiting students, processing applications and evaluating credentials, and for maintaining an accurate and complete record of each graduate student's academic progress.
7. **Support, Technical, and Infrastructure Responsibilities**

**Information Services and Technology (IST):**
Provides Helpdesk service and accepts requests for support for the three PeopleSoft applications via e-mail or phone.

*Note:* IST does not respond to business process related issues.

**Enterprise Applications (unit inside IST):**
Responsible for managing the central University-wide administrative systems, primarily PeopleSoft applications. Enterprise Applications is also responsible for managing, coordinating, and monitoring the efforts of service providers and new development vendors in the delivery of production support and development projects.

**Tata Consultancy Services (TCS):**
Provides PeopleSoft application services that include application functional and technical support, common table configuration maintenance, application security administration, batch process support, enhancement development, and tax updates.

**IBM Global Services:**
Provides infrastructure services that include database administration support, batch monitoring, and infrastructure support, e.g. servers, networks, fire walls, storage systems, back-ups.

**Faculties and Departments:**
All PeopleSoft users in faculties and departments on campus are responsible for the integrity of the data in the Financials, HCM, and CS applications.

8. Questions regarding PeopleSoft may be directed to:

**IST Helpdesk:** ist@ualberta.ca

**IST Website Live Chat:** http://ist.ualberta.ca/

**IST Phone:** 780-492-9400 (press option 3)
9. **PeopleSoft Security Access**

Access to PeopleSoft applications and modules must be requested.

Authorized approvers are staff within departments who are designated as signing authorities for those requesting PeopleSoft access. They must complete and submit a form to Enterprise Applications requesting security access for Financials and Campus Solutions.

An alternative method to get security access for Human Capital Management is for users with specific roles (assigned within a department or faculty) to request access via a security eForm (online electronic form).

10. Departmental security in Human Capital Management (HCM) and Campus Solutions (CS) limits the data that a user may view, update, or change.

   It is important to note that if you have access to both HCM and CS, your menus will show both applications.

11. Congratulations! You have completed the training on how PeopleSoft is used at the University of Alberta.

    **End of Procedure.**
Peoplesoft Access and Navigation

Overview

This section will provide an understanding of what is needed to access any of the three Peoplesoft applications, how to sign in, and the basic tools and features common to all three Peoplesoft applications. This includes an introduction to the general display areas, navigation, data retrieval, data review and data entry.

Objectives

Upon completion of this section you will have a general understanding of:

- How to Obtain Access to Peoplesoft Applications
- How to Sign In and Sign Out of Peoplesoft
- Common Navigational Features in Peoplesoft
- How to Search and Retrieve Data from Peoplesoft

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.
 Obtaining Access to PeopleSoft

Overview

This section will provide information regarding what is required to obtain access to the PeopleSoft applications and where to go to get this access. As well, you will be presented with information pertaining to system availability.

Objectives

Upon completion of this section you will have a general understanding of:

- How to obtain access to PeopleSoft
- When you can access PeopleSoft

Getting Access to PeopleSoft

To get access to any of the PeopleSoft applications you need to:

1. Have a U of A Campus Computing ID (CCID)
2. Complete and submit the appropriate Request for Administrative Applications Access form(s)

At the University of Alberta, the Information Services and Technology (IST) - Enterprise Applications group is responsible for managing the institution’s administrative systems, which is primarily PeopleSoft applications (Human Capital Management, Financial and Campus Solutions).

Campus Computing ID (CCID)

IST holds the authority to issue Campus Computing ID’s (CCID) which grants user access to the University’s computing systems and facilities. The CCID along with a user-unique password are both critical aspects of maintaining the integrity of the University’s computing environment.

All staff members are assigned a Campus Computing ID (CCID) that provides access to a variety of University services including PeopleSoft. This CCID ensures only legitimate users of PeopleSoft are able to access the applications.
Administrative Applications Access Forms

Each application is a security based structure and access is granted through Authorized Approvers setup in each unit. Therefore, in order to get access to any of the PeopleSoft applications, the appropriate Request for Administrative Applications Access form is required to be completed and submitted.

A summary of the PeopleSoft related Security Forms is provided below. The primary security form for each of the PeopleSoft applications is highlighted for you.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>PeopleSoft Application</th>
<th>Use</th>
</tr>
</thead>
</table>
| Authorized Approver Signature Form                 | ALL                    | Use this form to assign Authorized Approvers for a specified list of department IDs.  
This includes a change in the Dean, Director or Chair. |
| Authorized Approver Signature Addendum             | ALL                    | Use this form to add and remove authorized approvers from an existing group of authorized approvers for a specified list of department IDs.  
This form is not used when there has been a change in the Dean, Director or Chair; this type of change requires the Authorized Approver Signature form. |
| PeopleSoft Financials Proxy Assignments Access Request | FIN            | Use this form to add and/or modify an individual as the assigned stand-in (proxy) for a budget owner who is absent.  
2 |
| PeopleSoft Financials/SupplyNet Subdelegate Assignments Access Request | FIN            | Use this form to assign, update, remove, or suspend (temporary leave) a sub-delegate from the research project team to approve online purchase requisitions.  
Sub-delegation applies to research projects active in fund codes 330, 530, 531, 535 and 540 only. |
<p>| AdAstra Access Request                             | None                   | Use this form to add and remove access to Ad Astra (central room booking application). |</p>
<table>
<thead>
<tr>
<th>Form Name</th>
<th>PeopleSoft Application</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft Financials/SupplyNet Access Request</td>
<td>FIN</td>
<td>Use this form to request access to one or more of the following roles: General User Inquiry, General User Inquiry and Reporting, Billing Invoice Entry, AP Journal Voucher Entry, Department Purchase Requisition Entry, eTRAC administrator. This form is also used to remove all access to PeopleSoft Financials or to remove individual roles for a specified person.</td>
</tr>
<tr>
<td>PeopleSoft Campus Solutions Access</td>
<td>CS</td>
<td>Use this form to request departmental access to PeopleSoft Campus Solutions</td>
</tr>
<tr>
<td>PeopleSoft Delete Access Request</td>
<td>ALL</td>
<td>Use this form to remove all PeopleSoft access for the specified person.</td>
</tr>
<tr>
<td>PeopleSoft Travel &amp; Expenses Independent Reviewer Access Request</td>
<td>FIN</td>
<td>Use this form to assign or remove a user's access to perform independent review of research Travel &amp; Expense claims for specified department IDs.</td>
</tr>
<tr>
<td>PeopleSoft eTRAC Access Request</td>
<td>FIN</td>
<td>Use this form to request or remove access to view financial information for specified research projects in eTRAC.</td>
</tr>
<tr>
<td>PeopleSoft Human Capital Management (HCM) Access Request</td>
<td>HCM</td>
<td>Use this form to request departmental access to PeopleSoft HCM for inquiry and reporting of HR information for specified department IDs. Access may also be granted for time/leave entry on behalf of employees and to adjust /transfer historical salary and benefit expenses from one combination code to another. This form is also used to remove all access to PeopleSoft HCM or access to individual roles and department IDs for a specified person.</td>
</tr>
<tr>
<td>PeopleSoft Human Capital Management (HCM) Proxy Assignments Access Request</td>
<td>HCM</td>
<td>Use this form to add and/or modify proxy/delegations for an approver who is absent.</td>
</tr>
</tbody>
</table>
### Form Name | PeopleSoft Application | Use
--- | --- | ---
FIN = Finance; CS = Campus Solutions; HCM = Human Capital Management

1. **Authorized Approvers** are given the authority to submit PeopleSoft security forms for people (staff, guests, pre-hires) in the specified list of department IDs. Authorized approvers may also receive the CCID/passwords for people (staff, guests, pre-hires) in the specified department IDs.

2. **PeopleSoft Financials Proxy Assignments Access:** This access allows the assigned stand-in to approve travel & expense claims, travel advances and online purchase requisitions on behalf of the budget owner of the specified department or project.

3. **PeopleSoft Delete Access Request:** This form is used when a person with PeopleSoft access is moving to a new department or leaving the University.

4. **PeopleSoft Human Capital Management (HCM) Proxy Assignments Access Request:** Access as a proxy/delegate enables the individual to approve payable time and/or leaves on behalf of the approver.

The above forms can be found on the Information Services and Technology (IST) ([http://ist.ualberta.ca/](http://ist.ualberta.ca/)) website.

**Navigation path:** Services & Technology > Enterprise Applications > Enterprise Solutions > Administrative Applications Access > PeopleSoft Security Forms ([https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#dexp_tab_item_251145597](https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#dexp_tab_item_251145597))

The completed form should be sent to PeopleSoft Security Forms (aisecurityforms@ualberta.ca), using the E-mail or fax number indicated on the form.

HCM access can also be granted using the online Security eForm available to Authorized Approvers in PeopleSoft HCM. A link to the PeopleSoft HCM database is available on the IST website under PeopleSoft ([https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#access](https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#access)) Security Forms ([https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#access](https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#access)) section.

SupplyNet access can also be granted using the online Security eForm available in the SupplyNet Security Forms ([https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#access](https://ist.ualberta.ca/services/enterprise-applications/enterprise-solutions#access)).

**System Availability**

PeopleSoft processes batch (a series of programs) at the end of each day, month, and year. In order to accommodate this process, there are established hours of availability for the PeopleSoft applications. Information regarding PeopleSoft availability is provided within the Information Services and Technology (IST) ([http://ist.ualberta.ca/](http://ist.ualberta.ca/)) website.
System Time-Outs

PeopleSoft has defined time-out sessions that detect if a session has been inactive for the predetermined amount of time. Prior to the application logging off the user, a warning message will be displayed indicating the session is about to be timed out. Click the Okay button to extend the session. If the session has timed out, the sign-on process must be completed again. Following is a list of the current application time-outs:

<table>
<thead>
<tr>
<th>Application</th>
<th>Time-Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bear Tracks</td>
<td>30 Minutes</td>
</tr>
<tr>
<td>Human Capital Management (HCM)</td>
<td>40 Minutes</td>
</tr>
<tr>
<td>Campus Solutions (CS)</td>
<td>40 Minutes</td>
</tr>
<tr>
<td>Financials</td>
<td>40 Minutes</td>
</tr>
</tbody>
</table>

Signing In to PeopleSoft

In this topic you will learn how to sign in to PeopleSoft as well as how to properly sign out.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: ist@ualberta.ca > Services & Technology > Enterprise Applications > Enterprise Solutions
1. **Signing In to PeopleSoft**

   There are multiple ways to get to the three PeopleSoft Applications. Links to specific PeopleSoft Applications are provided throughout the various University websites.

2. However, all three PeopleSoft applications can be accessed using the Information Services & Technology Website.

   This tutorial will walk you through this specific Navigation Path.

3. First you will need to open the IST Website by entering the web address 'https://ist@ualberta.ca/' into the address bar of your internet browser.

4. Once you have opened the IST Website, Click the **Services & Technology** link.
5. Click the **Enterprise Applications** link.

6. Under the **Enterprise Solutions** sections you will find the list of links to each of the three PeopleSoft Applications.

   - **Campus Solutions**
   - **Financials**
   - **Human Resource Management (HCM)**
7. For example purposes, Click the HCM link.
8. In the **CCID** field enter Your CCID.’
   For example purposes enter "**Student**".

9. Press [**Tab**].

10. Enter your password into the **Password** field. Enter "**UOFA**".
11. Click the **LOGIN** button.

12. The Home Page of the PeopleSoft Application you selected will appear. In this example the Human Capital Management Home Page is shown.

13. **Signing Out of PeopleSoft**

   There is only one way to Properly Sign Out of PeopleSoft.

14. **NEVER** click the 'X' to sign out of PeopleSoft.

   This will technically leave the session active in PeopleSoft and may be a potential security risk.
15. To properly sign out of PeopleSoft, go to the top right corner and Click the Sign out link.

16. If you have signed out properly the Logged Out page will appear. You can now close out of your web browser.

17. Congratulations! You have completed the training on how To Sign In to PeopleSoft.

End of Procedure.

Common PeopleSoft Navigational Features

There are some basic tools and features common to all three applications that enable navigation. In this topic you will learn about the following common navigational features used within all PeopleSoft applications

- Favorites Menu
- Main Menu/ Navigation menu
- Breadcrumbs
- Universal Navigation Header
- Navigation Collections
To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

1. When you initially sign in to a PeopleSoft application you are taken to your Home Page.
2. **Within your Home Page** you will see four primary navigation areas:
   - Favorites Menu
   - Main Menu / Navigation Menu
   - Universal Navigation Header
   - Navigation Collection

3. It is important to note that the first 3 Navigation areas, Favorites, Main Menu and Universal Navigation Header, are static.

   This means that you will always be able to view and use these navigation features on any page within any of the PeopleSoft applications.

4. **Favorites Menu**

   Located in the top left corner of the screen is the Favorites Menu. This menu is used to save navigation time by book-marking frequently used pages.

   Click the **Favorites** dropdown button to activate the menu.
5. Under the Favorites Menu is the **Recently Used** header.

This displays a list of the last 5 pages you accessed.

You can click on the page name listed to navigate directly to that page.

6. Also within the Favorites Menu is the **My Favorites** Header.

Under this header you can:
- View and Access your Favorites list
- Add to your Favorites list
- Edit your Favorites list

This list is used to quickly navigate to pages you use on a regular basis.

Further details on how to use your "My Favorites" feature is provided in a topic of its own.

7. **Main Menu / Navigation Menu**

The **Main Menu** is located in the top left of the screen, beside the Favorites Menu.

It consists of a hierarchy of menu items used to access PeopleSoft folders and pages.

Click the **Main Menu** dropdown button to activate the menu.
8. The menu items available within the **Main Menu** will vary for each employee. This access is based on the PeopleSoft Department security you have been given and the job you do.

9. Additional menu items are displayed depending on the hierarchy of the item you selected.
10. A yellow **Folder** icon indicates additional options available.
11. A **Page** icon indicates a direct link to a page.

12. In the example provided, the PeopleSoft HCM Application is being used.
   
   Keep in mind that the functionality being demonstrated **applies to ALL PeopleSoft applications**.

13. To demonstrate how the folder menu items work,
   Click the **Self Service** list item.

   ![Self Service Menu]

14. More items are displayed until you reach the lowest level of the menu structure.
   
   Click the **Time Reporting** list item.

   ![Time Reporting Menu]

15. Click the **Report Time** list item.
16. The lowest level of the menu has a Page icon on the left.

17. In this example, the **Timesheet** menu is the lowest level under the **Report Time** folder.

When you click on this menu item you will be taken directly to that page.

Click the **Timesheet** list item.
18. **Menu Breadcrumb**

In this example the *Timesheet* page is displayed from the PeopleSoft HCM application.

At the top of the page you will find the **Menu Breadcrumb**.

The main feature of menu breadcrumbs is to keep track of where you are by displaying the path taken.

19. You can also use breadcrumbs as a quick navigation to move between pages within the system.

For example, to navigate to the Benefits Summary page use the breadcrumb on the page and Click the **Self Service** link.

20. The menu navigation list related to the Self Service breadcrumb link will appear.

Click the **Benefits** list item.
21. Click the **Benefits Summary** list item.
22. The **Benefits Summary** page appears and the Breadcrumb at the top of the page has changed to reflect the navigation path.

23. **Universal Navigation Header**

   In the top right corner of your page is the **Universal Navigation Header**.

   The universal navigation header is available at any point in the application and contains hyperlinks such as:
   - Home
   - Worklist
   - Add to Favorites
   - Sign Out
24. The **Home** link returns you to your Home Page which is the page you see after you initially sign in to PeopleSoft.

   Click the **Home** link.

25. In this example you are returned to the PeopleSoft HCM Home Page.

26. The **Worklist** link is available in all PeopleSoft Applications but is currently not being used at the UofA.

27. The next link within the Universal Navigation Header is the **Add to Favorites**.

   This link works the exact same way as the Add to Favorites option under the Favorites Menu. This is just another way for you to access this feature.

28. The last link provided in the Universal Navigation Header area is the **Sign Out** link.

   Details on using this link are provided within the Signing In To PeopleSoft topic.
29. **Navigation Collections**

The last main navigation feature is **Navigation Collections**.

Depending on the PeopleSoft Application you sign in to, you may have **Navigation Collections** setup on your Home Page.

PeopleSoft provides the ability to group links to pages. The grouping of these links are called a Navigation Collection. The links in a navigation collection provide an alternate method of accessing PeopleSoft content.
30. Navigation collections are used as a quick and easy way to open commonly used PeopleSoft pages.

The options you see in your navigation collection may vary, depending on your PeopleSoft security.

31. Congratulations! You have completed the training on the Common PeopleSoft Navigational Features.

End of Procedure.

Understanding the Favorites Menu

In this topic you will learn about the features within the Favorites Menu. Such as, how to add commonly used PeopleSoft pages to your Favorites menu and how to edit your existing Favorites menu.
• Click the button located in the top left of the screen and follow the instructions provided.

Procedure

1. **Favorites Menu**

As mentioned in the PeopleSoft Navigation - Common Features topic, the Favorites Menu is used to save navigation time by book-marking frequently used pages.

Click the **Favorites** dropdown button to activate the menu.

2. Within the Favorites Menu dropdown list you can view, edit and access your list of Favorite pages under the **My Favorites** sub-header.

This topic will provide details on how to:
• Add to Favorites
• View and Use your Favorites List
• Edit Favorites

3. Your Favorites list is specific to you and no one else and is not automatically created.

You are in control of this list and therefore you need to build it.

You don't need to build your favorites list all at once. As you use the different pages within PeopleSoft you can determine which pages you want in your list and build it as you go.
4. **Add to Favorites**

There are 4 steps to add to your favorites list.

**Step 1.** Navigate to the page you want to add to your favorites list.
**Step 2.** Click on the Add To Favorites Tool
**Step 3.** Enter a Unique Description for your list item
**Step 4.** Click OK to Save

5. **STEP 1: Navigate To The Page**

Before you can use the Add to Favorites tool you need to open or go to the PeopleSoft page that you want to add to your list.

In this example the PeopleSoft HCM application is used and the Query Viewepage is going to be added to the Favorites list.

Click the **Main Menu** dropdown button to activate the menu.

6. **Click the Reporting Tools option.**

7. Click the **Query** option.

8. **Click the Query Viewer option.**

9. **STEP 2: Click on the Add to Favorites tool.**

When you are at the page you want, there are two places that the Add To Favorites tool can be accessed.
10. First way is using the **Favorites Menu**.

   Click the **Favorites** dropdown button to activate the menu.

   ![Favorites Menu](image)

11. Click the **Add to Favorites** list item.

   ![Add to Favorites](image)

12. **STEP 3: Enter a Unique Description or Name for the page.**

   In the **Description** field enter "**Example - Query Viewer**".

   ![Description Field](image)

13. **STEP 4: Click OK to Save**

   Click the **OK** button.

   ![OK Button](image)

14. Click the **OK** button.
15. The other way to get to the Add To Favorites tool is through the **Universal Navigation Header**.

   Click the **Add to Favorites** link.

16. After clicking on the link, you would follow the exact same steps as mentioned before.

   Because this page has already been added to the favorites list, Click the **Cancel** button.

17. To make sure that your page saved to your favorites list, Click the **Favorites** dropdown button to activate the menu.

18. The page you just added should appear under the **My Favorites** Header after the Add To Favorites and Edit Favorites tools.

19. For demonstration purposes return to the Home page.

   Click the **Home** link.
20. **Viewing & Using Your Favorites List**

To view your Favorites list, click the **Favorites** dropdown button to activate the menu.

![Favorites dropdown](image)

21. Your list of favorites will appear under the My Favorites header.

22. Your Favorites list is used to quickly navigate to these specific pages.

For example purposes,
Click the **Job Data** list item.

![Job Data](image)

23. As soon as you click on the list item you are taken to that page.

In this example, you are taken to the **Job Data** page.
24. Even if you have a page open you can still use your favorites list to navigate to another page.

For example purposes, while the Job Data page is open, click the Favorites dropdown button to activate the menu.

25. Click the **View GL Funding** list item.

26. The GL Funding Search/Inquiry page will open up.
27. For demonstration purposes return to the Home page.

Click the **Home** link.
28. **Editing Your Favorites List**

Within every PeopleSoft application you have the ability to edit your Favorites list as long as it has already been built.

Click the **Favorites** button.

29. Click the **Edit Favorites** menu.

30. In the **Edit Favorites** page you can customize and edit your Favorites list.

You can ...

- Change the order in which your Favorites appear in your list
- Edit/change the name of a Favorite
- Remove a Favorite from your list
- Change the sorting sequence

31. **Changing the Order of Your Favorites List**

To rearrange the order of your favorites, use the **Sequence Number** column fields and enter numerical values, where "1" is the first item to appear in your list.
32. For example purposes you will be rearranging the existing list as follows.
   ○ Job Data
   ○ ChartField Speedtypes
   ○ ChartField Values
   ○ View GL Funding*
   ○ Example - Query Viewer

33. In the Job Data row enter "1" into the Sequence number field.

34. In the ChartField Speedtypes row enter "2" into the Sequence number field.

35. In the ChartField Values row enter "3" into the Sequence number field.

36. In the View GL Funding* row enter "4" into the Sequence number field.

37. In the Example - Query Viewer row enter "5" into the Sequence number field.
38. Once you are done entering the sequential numbers, Click the **Save** button.

39. The Favorites list items are rearranged into the new sequential order.

40. **Editing/Changing the Name of a Favorite**

   You can also change the name of your list item.

   In this example you will be changing the 'WA - Query Viewer' list item to read as 'Viewing Queries'.
41. Click in the **Appropriate Favorite** field.

   ![Appropriate Favorite field example]

42. In the **Favorite** field enter "**Viewing Queries**".

   ![Favorite field example]

43. Click the **Save** button.

   ![Save button]

44. The name has now been changed.

45. **Removing a Favorite**

   In the **Edit Favorites** page you can also delete a favorite from your list.

   In this example the View GL Finding* page is to be removed from the list.
46. On the far right hand side of the grid there is a delete button for each row.

In the row for the View GL Funding* favorite, Click the **Delete row** button.

47. Confirm that you want to delete the selected row.

Click the **OK** button.

48. The entire row is removed from the list.

Notice that the Sequence Number fields remain the same. Even though the number 4 is missing from the sequence, the system will still keep the sequential order.

49. **Changing the Sorting Sequence**

You can also personalize your favorites list further by changing the sorting sequence.

50. For example purposes, change the sorting sequence to descending order.

Click the **Personalize** link.

51. The **Column Order** section provides a list of columns you can sort by.

The **Sort Order** section allows you to specify the sort order for the available columns.

The system auto defaults to sort the columns in ascending order.

52. To change the sort order of a column, highlight the Column name under the Column Order Section.

For example purposes, Click the **Sequence number** list item.
53. Click the Add To Sort button.

54. The Column name you highlighted should appear in the Sort Order section.

   Ensure the column name is highlighted in the Sort Order section and
   Click the Descending option.

55. To see how this change will affect your Favorites list, Click the Preview button.

56. The grid at the bottom of the page displays how your Favorites list will appear under
    the Favorites Menu.

57. To save the changes, Click the OK button.

58. You will be returned to the Edit Favorites page.

   After all of your edits have been completed, Click the Save button.

59. Return to your Home page.

   Click the Home link.
60. To make sure that your edits were saved, Click the Favorites dropdown button to activate the menu.

61. Your Favorites list should be displayed with the edits made.

62. Congratulations! You have completed the training on understanding the Favorites Menu in PeopleSoft.

End of Procedure.
Searching and Retrieving Data in PeopleSoft

Overview

PeopleSoft offers a number of features to assist in selecting, reviewing, or entering data. In this section you will learn about the general tools used to help retrieve information from PeopleSoft.

Objectives

Upon completion of this section you will have a general understanding of:

- Common Retrieval and Data Entry Tools
- Using a Search to Retrieve Data

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.

Common Retrieval and Data Entry Tools

The most common retrieval and data entry tools you will see are listed below.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Visual</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td><img src="image" alt="Calendar" /></td>
<td>To select a date from a calendar rather than enter the date manually.</td>
</tr>
<tr>
<td>Feature</td>
<td>Visual</td>
<td>Use</td>
</tr>
<tr>
<td>--------------</td>
<td>--------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Drop-down</td>
<td></td>
<td>To select data from a choice of pre-defined values for a field.</td>
</tr>
<tr>
<td>Lookup</td>
<td></td>
<td>To obtain a list of valid values for a field. The retrieved list will vary depending on the field to which it applies and your security access.</td>
</tr>
<tr>
<td>Scroll Bar</td>
<td></td>
<td>To view additional rows that do not fit on the grid.</td>
</tr>
</tbody>
</table>

**Using a Search to Retrieve Data**

In this topic you will learn how to use the search tool to retrieve data or review information stored within PeopleSoft.

---

**To Begin the Online Tutorial:**

- Click the button located in the top left of the screen and follow the instructions provided.

---

**Procedure**

1. A search in PeopleSoft generally starts from a **Find an Existing Value** tab (commonly referred to as a search page).
2. Every search page will have a **Search Criteria** area. The information you enter in the search criteria will help search for and retrieve the information you are looking for.

3. The fields provided within the **Search Criteria** area are considered to be **Key Fields** that are common on the tables, behind the scenes, that the system is looking at to gather your information.

4. The Search Criteria area also provides the option to select a **Search String Operand** for each Key Field.

5. The search string operand provides more flexibility in conducting your search by restricting or defining your search criteria further. It allows you to look for a combination of letters or numbers in specific search fields.

For example purposes, click the button to the right of the **begins with** field for the **Empl ID**: Key Field.

```
Empl ID:  
```

```
begins with  
```
6. Within the Drop-down list you will find the options available that apply to the Key Field you are in.

   An example of how to use these options is provided later in this tutorial.

   As well, a full description of each of the search string operands is provided under the Additional Reference Material link called ‘PeopleSoft Search String Operands’.  WA - Insert link to doc on website

7. You can enter your search criteria into one or a number of the fields. The more information provided in the search criteria, the more specific your search results will be.

8. You can perform two types of searches in PeopleSoft.

   An **Advanced** search provides more than one key field with a number of options for search string operands.

   Most pages are defaulted to the advanced search type.

9. A **Basic** search provides only one key field and the corresponding search string operand is set for you.

   Click the **Basic Search** link.

10. Provided is an example of a **Basic** search type.

    Generally the one Key Field in a Basic search is the first field listed in the Advanced search.

11. To demonstrate the search feature, the **Advanced** search type will be used.

    Click the **Advanced Search** link.

12. In this example you are looking for the Job Record for an employee. You know that the Employee ID starts with 144 and that the last name is Fa.
13. Because you only know the first part of the Employee ID you can use the Search String Operand 'begins with'.

   Click the button to the right of the Empl ID Search String Operand field.

   **Empl ID:**
   
   begins with

14. Click the **begins with** list item.

   begins with

15. Enter the known information into the Empl ID field. Enter "144".

   **Empl ID:**
   
   begins with

16. Now to add the last name to the search criteria.

   Click the button to the right of the Last Name Search String Operand field.

   **Last Name:**
   
   begins with

17. Click the **=** list item.

   =

18. Enter the known information into the Last Name field. Enter "Fa".

   **Last Name:**
   
   =

19. Click the button.

   Search

20. Your **Search Results** are displayed in the grid.

   In this example there are two employees that fit the search criteria that was entered.
21. Before continuing with another search it is recommended to clear your Search Criteria. This practice will ensure that your search is looking for exactly what you want.

Click the **Clear** button.

22. Once your previous Search Criteria is cleared from the Key Fields, you can continue with your next search.

23. Instead of entering data or a portion of data in the key fields you can use **wildcard** characters to search in PeopleSoft.

The two commonly used wildcard characters are:
  - ' % ' (**percent symbol**) To match one or more characters.
  - ' _ ' (**underscore**) To match any single character.

24. Again, all features and functions covered within this topic applies to all PeopleSoft Applications. The only difference is the data and information.
25. Congratulations! You have completed the training on how to use a search to retrieve data in PeopleSoft.

End of Procedure.
PeopleSoft Reporting

Overview

This section will provide an understanding of the basic functions and features used when reporting in PeopleSoft.

Objectives

Upon completion of this section you will have a general understanding of:

- Running a PeopleSoft Query
- Creating a New Run Control ID
- Round Bullet; Arial; 12 font; 6pt space

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.

Running a PeopleSoft Query

PeopleSoft Query enables you to run one-time or scheduled queries by selecting specific fields from specified record(s).

Queries are generally used to extract information at a transactional or detail level.

For example,

- To obtain a list of Terminated Employees; or
- To obtain Job information for hourly employees
The output can be displayed on the screen (Run to HTML) or downloaded into Excel and manipulated as needed.

In this topic you will learn the basics of how to run a PeopleSoft Query.

---

**To Begin the Online Tutorial:**

- Click the button located in the top left of the screen and follow the instructions provided.

---

**Procedure**

Navigation Path: **Main Menu > Reporting Tools > Query > Query Viewer**

1. Click the **Main Menu** button.

2. Click the **Reporting Tools** menu.

3. Click the **Query** menu.

4. Click the **Query Viewer** menu.

5. To view an existing query by **Query Name**, enter the Query name into the **begins with** field.

   For example purposes, enter "ZTL_DIST_TERMINATIONS".
6. **Click the Search button.**

7. A list of queries matching the search criteria is displayed.

   There are multiple outputs a query can be run to.
   - HTML - view results online
   - Excel - view results in a spreadsheet
8. **Run Query to HTML**

To view the query results online, click the **HTML** link.

9. **Select or enter the Effective Date (from)**

For example purposes, click the **Choose a date (Alt+5)** button.

10. **Click the button to the right of the Month field.**

11. **Click the January list item.**

12. **Click the 1 link.**
13. Select or enter the Effective Date (to)

For example purposes, click the **Choose a date (Alt+5)** button.

![Choose a date button](image)

14. For example purposes
   Click the **Current Date** link.

![Current Date link](image)

15. Click the **View Results** button.

![View Results button](image)

16. The results of the query are displayed online.
17. Run Query to Excel

Click the Excel link.
18. Enter or select the dates to run the query for.

Click the **View Results** button.
19. From here you can:
   • Open the Excel file directly. [Click on Open]
   • Save the Excel file for data manipulation or later use. [Click on Save]
   • Close the page if the operation is no longer needed. [Click on Cancel]

   For example purposes,
   Click the **Open** button.
20. Your results are displayed in an Excel spreadsheet. Press [Enter].

21. Congratulations! You have completed the training on Running a PeopleSoft Query. **End of Procedure.**

**Creating a New Run Control ID**

Every Operational Report you run will require a Run Control ID. A Run Control ID refers to a custom naming convention for each report. Run Control IDs are used to identify the specific options used to run a type of report. You will need to assign a name to each type of report you run. When naming a run control ID, keep in mind that you will need to be able to recognize one run control name from another.

By creating your own individual Run Controls you can save time when running infrequently used reports. The only change you may be required to make is in the date range.

**Naming Conventions**
There are several ways to name your Run Control.

Some naming recommendations are:

- AdHoc, Daily, Weekly, Monthly, Qtr, or YR to identify run frequency
- Staff_Detail
- Leave_Balance
- Employee_Performance_History
- Salary_Report
- Biweekly_Time_sheets

Run Control IDs can not contain any spaces. Use the underscore "_" between words instead.

---

**To Begin the Online Tutorial:**

- Click the button located in the top left of the screen and follow the instructions provided.

---

**Procedure**

Navigation Path: Main Menu > HR Operational Reports* > Absences, Time and Labor* > Leave Balance*
1. Navigate to any HR Operational Report.

To demonstrate how to create a new Run Control ID the Leave Balance report will be used.

2. Once you have opened the report page, Click the **Add a New Value** tab.

![Image of the Leave Balance report](image-url)
3. In the **Run Control ID** field enter "**LEAVE_BALANCE**".

   **Run Control ID:**

4. Click the **Add** button.

5. Identifying the report options is up to the individual running the report.
6. The following is an example of how to select and save different data selections for the Leave Balance report.

Click the **Department(s)** option.
7. Click the **Department Range(s)** option.

8. Click the **Look up Plan Type (Alt+5)** graphic.

9. Find and select the appropriate **Plan Type**.

   For example purposes,
   Click the **50 - General Illness** list item.

10. Click the **Add a new row at row 1 (Alt+7)** button.

11. Click the **Look up Plan Type (Alt+5)** graphic.
12. Find and select the appropriate **Plan Type**.

   For example purposes, 
   Click the **51 - Vacation** list item.

13. Click the **Add a new row at row 2 (Alt+7)** button.

14. Click the **Look up Plan Type (Alt+5)** graphic.

15. Find and select the appropriate **Plan Type**.

   For example purposes, 
   Click the **52 - Casual Illness** list item.

16. Click in the **Dept ID From** field.
17. Click the **Run** button.

18. The Report Format and Distribution will default to Web delivery in a PDF format. When you choose web, the report will show up under My Reports on your Manager Dashboard.

19. You can choose to change formats. The **CSV** option will return an Excel format which you can sort and save.
20. Click the **CSV** list item.

21. Having a report sent to your email inbox is another alternative.

When you choose this option however, the report will not show up under My Reports on your Manager Dashboard.

22. Click the **OK** button.
23. Click the **Process Monitor** link.

PROCESS MONITOR
24. The **Process Monitor** shows the status of the report generation. By clicking the Refresh button, it will update the run status.

Click the **Refresh** button.

25. When the **Run Status** shows **Success** and the **Distribution Status** shows **Posted**, the report is ready for review.

26. To navigate back to the Main Menu, in the top right of the page, Click the **Home** button.

27. From the Main Menu navigate to the Report Manager to retrieve your report.

   **Navigation Path:** **Main Menu > Reporting Tools > Report Manager**

   Click the **Main Menu** button.
28. Click the **Reporting Tools** menu.

29. Click the **Report Manager** menu.

30. Click on the report link. For example purposes, Click the **ZHRE087** link.

31. Depending on the type of report requested, it will open in a new window.

32. Congratulations! You have completed the training on Creating a New Run Control ID.

**End of Procedure.**