2019 PeopleSoft User's Conference

CONFERENCE BROCHURE

On Thursday, October 24, 2019, the San Diego County Office of Education is hosting a free one-day PeopleSoft conference for the organizations that use PeopleSoft Finance and Human Capital Management.

Theme: “The More You Know”

SCHEDULE

8:00-8:35	Registration & Continental Breakfast - *Please plan to arrive during this time.*
8:40-9:00	Opening Session (Outdoors)
9:10-10:00	Session A
10:10-11:00	Session B
11:10-12:00	Session C
12:00-1:00	Lunch
1:10-2:00	Session D
2:10-3:00	Closing Session

Visit the conference website at http://crc.sdcoe.net/peoplesoftconference for additional details and updates.

san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES℠

Overview

How To Register

Registration: Friday, August 30 - Wednesday, September 18, 2019 (late registrations accepted until September 25)

Directions:

- **Check with your Conference Contact to make sure you are approved to register.**
- Review this conference brochure to pick your desired sessions.
- Go to http://crc.sdcoe.net/peoplesoftconference. Use the registration form to enter your first and second choices for each session (Sessions A, B, C, D).
- By Friday, October 4 you will receive a personalized schedule.
- If you need to make a change after you have registered, please email lfreetrout@sdcoe.net. Please note that Friday, October 11 is the last day for any requests for registration changes.

About The Conference

Date/Time/Location: Thursday, October 24, 2019 from 8:00 am - 3:00 pm at the San Diego County Office of Education

Why attend? To learn best practices, share ideas, network with district peers, leave feeling refreshed and inspired!

Who should attend: Sessions are geared for HCM users, Finance users, and "cross-topics" (both HCM & FIN). NOTE: This is not intended to be training!

Intended goal/outcome: As a team, participate in a variety of sessions and then share with one another after. Disseminate info to your own user community.

Who's presenting? This is a district-run event! Facilitators and guest speakers are intended to be from the districts and charter schools. The planning committee will reach out to look for people to take 5-10 minute "spots" at sessions to share your experiences, insights, and tips. If you would like to present on a topic, please email lfreetrout@sdcoe.net and she will get you connected.

Costs: There is no conference fee for attendees (free).

Parking: Due to limited space, please plan to carpool. Cars and vans with 4+ people will have access to free valet parking in the SDCOE parking lot (Fleet Services area).

Session Topics: See the Conference Schedule pp.4-9. Select your first and second choice topics for each session.

Conference Planning Committee: The planning committee has representation from 7 organizations.

1. Del Mar
2. Escondido Elementary
3. Julian Elementary
4. Ramona
5. San Dieguito
6. Santee
7. SDCOE

Day At a Glance: 10/24/19

Arrival (8:00-8:35 am)

CARPOOLS/PARKING

Please plan to carpool to the event as onsite parking at the SDCOE will be limited.

Cars and vans with 4+ people will have access to free valet parking in the SDCOE parking lot (Fleet Services area).

SIGN IN

Proceed to the sign-in table at Building 5 (outside). Due to space limitations and materials preparation, no walk-ins will be admitted.

Please be sure to finish signing in by 8:35 am.

CONTINENTAL BREAKFAST

A simple continental breakfast and coffee/tea will be provided. Specific offerings are subject to change.

Opening Session (8:40-9:00 am)

The opening session will be held outside of Building 5. Get prepped for a full-day of meeting others, networking, and sharing ideas!

Morning Sessions (9:10 am – 12:00 pm)

Attend three, 50-minute sessions (A, B, C) conducted in various rooms across campus.

Lunch (12:00-1:00 pm)

Enjoy a hosted lunch. Connect with your team, meet other teams, browser the vendor tables, and get refreshed for the afternoon.

Afternoon Session (1:10-2:00 pm)

After lunch, attend one additional 50-minute session (D). When it's over, head over to Closing Session in Rm 401-402.

Closing Session (2:10-3:00 pm)

Gather round, grab a treat, and hear from the Customer Advisory Board (CAB). Share final thoughts before we wrap for the day.

Conference Schedule

ALL = For HCM and/or Finance users
* = Session is offered multiple times

	Opening Session 8:40-9:00	A 9:10-10:00	B 10:10-11:00	C 11:10-12:00		D 1:10-2:00	Closing Session 2:10-3:00
Sign In & Continental Breakfast (8:00-8:35)	The opening session will be held outside of Building 5. Get prepped for a full-day of meeting others, networking, and sharing ideas!	*Excel Pivot Tables (HANDS-ON COMPUTER) *ALL* FULL	*Excel Pivot Tables (HANDS-ON COMPUTER) *ALL* FULL	*Excel Pivot Tables (HANDS-ON COMPUTER) *ALL* FULL	Lunch (12:00-1:00) – Connect with your team and others	*Excel Pivot Tables (HANDS-ON COMPUTER) *ALL* FULL	Gather round, grab a treat, and hear from the Customer Advisory Board (CAB). Share final thoughts before we wrap for the day.
		*Excel Vlookup (HANDS-ON COMPUTER) *ALL* FULL	*Excel Macros (HANDS-ON COMPUTER) *ALL* FULL	*Excel Vlookup (HANDS-ON COMPUTER) *ALL* FULL		*Excel Macros (HANDS-ON COMPUTER) *ALL* FULL	
		How to Audit DBT, Positions, and Job Data ***HR, FIN***	Methods to Validate Payroll Encumbrances ***FIN, HR, PAYROLL***	How to Handle Purchasing Pre-Encumbrances and Encumbrances ***PURCHASING, FIN***		Encumbrance Definitions Screen: How can I get payroll to Pre-Encumber a Certain Way? ***FIN, HR***	
		Financial Analysis and Reporting Tools Part I (I of II) ***FIN, PAYROLL***	Financial Analysis and Reporting Tools Part II (II of II) ***FIN, PAYROLL***	When Should I Request Correct History for Job Data and Positions? ***HCM***		How to Research Payroll Suspense ***FIN, PAYROLL, HR***	
		*Best Excel Formulas to Work With Your Data *ALL*	Tips and Tricks for Query Managers *ALL*	Auditing Step Increases ***HR, PAYROLL***		*Best Excel Formulas to Work with Your Data *ALL*	
		*Benefits are Not a Game of Chance ***BENEFITS***	For Beginners: How Job Data and Position Screens Impact Other Screens ***HCM***	Your Successful Benefits Practices ***BENEFITS***		*Benefits are Not a Game of Chance ***BENEFITS***	
		AP Tips and Tricks…Simplifying the Process! ***AP, PURCHASING, FIN***	What's New in Purchasing? ***PURCHASING***	Suppliers and 1099s ***AP***		Purchasing Roundtable ***PURCHASING***	

Opening Session 8:40-9:00	A 9:10-10:00	B 10:10-11:00	C 11:10-12:00	D 1:10-2:00	Closing Session 2:10-3:00
	The Advantages We Saw from Implementing ESS Pagelets *HCM, ESS*	For Beginners: Introduction to PeopleSoft *ALL*	Test Your Payroll Knowledge *PAYROLL*	How to Implement PeopleSoft ESS Absence Requests and Approvals *HCM, ESS*	
	How to Prepare Your Data for Mass Salary Updates for Your District *HCM*	For Beginners: Introduction to Budgets *FIN*	For Beginners: How to Schedule Queries and Reports *ALL*	Financial Asset Management: Loading Legacy Assets and other Topics *FAM*	
	*Retirement in PeopleSoft *HCM*	*Retirement in PeopleSoft *HCM*	Credentials in PeopleSoft *HCM*	Putting HCM Best Practices into Practice *HCM*	

Session A Descriptions

* = Session is offered multiple times

*Excel Pivot Tables (Hands-On Computer)
"I can't believe what a timesaver this is!" Join us for some hands-on learning where we focus on one of Excel's most powerful features: the pivot table. A pivot table allows you to extract specific data from a large, detailed data sheet. We will learn to use a pivot table to build a list of unique values, summarize, sort, count, total, average, and analyze information stored in a file of sample data exported from Excel.

*Excel Vlookup (Hands-On Computer)
Want to learn how to create and use a Vlookup? In this hands-on session, we will use real-world PeopleSoft examples to teach you Vlookups and Index/Match functions to look up, retrieve, and organize data. Great for merging two queries together that contain a field in common.

How to Audit DBT, Positions, and Job Data
Is your data "clean"? Is the same data reflected across all screens? Do you know what data is critical to other areas of PeopleSoft (Payroll, Benefits, Retirement, Budgeting, etc.)? Do you know what queries to run in order to verify that your data is "clean"? If your job involves any of these areas in PeopleSoft and the answer is No or I Don't Know, then join us in this session as we discuss how to audit DBT, Positions & Job Data

*Financial Analysis and Reporting Tools Part I (I of II)
In this session, Districts will present and discuss tools that have been created to assist with financial analysis and reporting requirements. Analysis tools include 1% calculation, payroll distribution adjustments, ledger and budget details, and more. Note that this session is different than Part II.

*Best Excel Formulas to Work with Your Data
Have you ever wondered how to transform your raw data into a customized spreadsheet that provides you with a better analysis of information? Together let's discuss simple and intermediate formulas tested and validated by other districts that can help with doing more with your query download.

*Benefits are Not a Game of Chance
Pass "Go", don't go "straight to jail!" Join us for "Benefits Monopoly" as we test your knowledge of Benefits, Benefits processes, and other benefits tricks of the trade. The goal of this session is to help you overcome Benefits challenges and roadblocks.

AP Tips and Tricks…Simplifying the Process!
Join us in this session to learn tips and tricks on streamlining the payable process. We will discuss batching, spreadsheets, how to view vendor payable information, reconciling/auditing payables, and more.

The Advantages We Saw from Implementing ESS Pagelets
Hear from districts about their experience with "read only" access to Personal Information, Benefits, and Absences and the advantages they saw for their employees and district office staff.

How to Prepare Your Data for Mass Salary Updates for Your District
Do you currently prepare spreadsheets for mass salary updates, or do you plan to in the future? At this session we will demonstrate the M_HR_SALARY_SCHED_UPDATE query to correctly prepare a spreadsheet for mass salary updates. We will include the various options you have when preparing the spreadsheet and follow a checklist that will help you to ensure you've prepared your salary spreadsheet correctly.

*Retirement in PeopleSoft
Presented by SDCOE Retirement. This session will focus on information in PeopleSoft that affects retirement reporting to CalPERS, CalSTRS, Social Security & Medicare. Please join us to learn about specific pages, screens, and fields that impact retirement reporting.

Session B Descriptions

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*Excel Pivot Tables (Hands-On Computer)

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*Excel Macros

Do you have a repetitive task that you want to automate in Excel? Join this hands-on session and learn how to create and run macros. In this session we will help you revolutionize your working relationship with Excel by the use of macros. Whether you need a basic introduction to automating and reducing your workload with Visual Basic Applications (VBA), or need hands-on practice, tips, and tricks, this session is for you.

Methods to Validate Payroll Encumbrances

Let's get the PEDR and start calculating! Come to this session to learn when and how to validate payroll encumbrances. We will also discuss the significance of timing and how encumbrances are calculated and adjusted.

Financial Analysis and Reporting Tools Part II (II of II)

Ready for more Financial Analysis? This session is a continuation of Financial Analysis and Reporting Tools Part I: Districts will present and discuss tools that have been created to assist with financial analysis and reporting requirements. Analysis tools include 1% calculation, payroll distribution adjustments, ledger and budget details, and more. Note that this session is different than Part II.

Tips and Tricks for Query Managers

This session is intended for Query Managers who have attended training to provide advanced content. Join us to learn tips and tricks that extend beyond the basics presented in training. This session will cover methods that can assist in data retrieval and manipulation via PeopleSoft Query Manager. We will also discuss commonly used expressions, ways to find records and fields, and things to look out for.

For Beginners: How Job Data and Position Screens Impact Other Screens

Do you want to know more about the key fields in HR - what they are, how they impact other areas and where potential issues may originate? Join us for this session as we discuss the cause and effect relationship of Job Data and Position entries across multiple HCM and Finance PeopleSoft modules.

What's New in Purchasing?

Join us in this session to learn what's new in Purchasing. Some of the topics are: Buyer's WorkCenter, Buyer's Workbench, PO Rollover Process. We will also provide an update on enhancement requests.

For Beginners: Introduction to PeopleSoft

Are you new to PeopleSoft? Join us in this session as we look at navigating the CRC Website/Resources, Bread Crumbs, Favorites, Personalizations, Worklist, Queries (how to search and add favorites), and how to use the search operators such as contains, =, >=, =<, etc.

For Beginners: Introduction to Budgets

If you are a beginner to PeopleSoft Finance, come join this session where we will discuss the most common pages and functions such as Budgets Overview, Revised Budget Summary, Budget Status Report, and favorite queries.

*Retirement in PeopleSoft

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*Excel Pivot Tables (Hands-On Computer)
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*Excel Vlookup (Hands-On Computer)
Want to learn how to create and use a Vlookup? In this hands-on session we will use real-world PeopleSoft examples to teach you Vlookups and Index/Match functions to look-up, retrieve and organize data. Great for merging two queries together that contain a field in common.

How to Handle Purchasing Pre-Encumbrances and Encumbrances
In this session you will learn how to prevent, identify, and resolve issues related to pre-encumbrance and encumbrance balances.

When Should I Request Correct History for Job Data and Positions?
History in PeopleSoft is key! Join us to learn about how Correct History changes are made, what they impact, and the proper way to enter a historical change without losing existing history.

Auditing Step Increases
Do you know which queries to use to validate step advances? Come find out! Join us to learn how to identify employees eligible for step advance, compare the Comp Rate on Job Data with the Comp Rate on the paysheet after precalcs, and view Salary Step Entry dates for all employees.

Your Successful Benefits Practices
Come join us to learn how some of our benefits colleagues successfully administer their benefits from start to finish.

Suppliers and 1099s
Do you work with Suppliers and 1099's? In this session, we will discuss supplier set-up, voucher entry for out of state vendors, Associated Student Body (ASB) Imports, the 1099 auditing/mismatch query, and the 1099 creation process.

Test Your Payroll Knowledge
Join us for "Payroll Monopoly" as we test your knowledge of Payroll, Payroll processes, and other Payroll tricks of the trade. The goal of this session is to help you overcome Payroll challenges and roadblocks.

For Beginners: How to Schedule Queries and Reports
Are you a beginner in Queries? Not sure how to schedule reports? This session covers the steps for scheduling reports and queries in PeopleSoft, including: selecting recurrences, output format, destination, and adding external recipients.

Credentials in PeopleSoft
Presented by SDCOE Credentials. In this session, we will discuss the Credential screens in PeopleSoft including information on credential holds, SEID numbers, queries/reports, and registering documents. We will also discuss the changes coming to the Assignment Monitoring process and how you can use these screens to prepare.

Session D Descriptions

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Encumbrance Definitions Screen: How can I get Payroll to Pre-Encumber a Certain Way?

Don't work for pre-encumbrances…make pre-encumbrances work for you!! Learn how to manage and edit the Encumbrance Definitions page to pre-encumber vacant positions with department changes, vacant new positions, and more.

How to Research Payroll Suspense

Do you have payroll entries in suspense? Learn how to identify whose pay went to suspense when the BETTERPDR doesn't match finance, when to use the Correct Suspense Entry screen to fix entries, and how to clear benefit adjustments.

*Best Excel Formulas to Work with Your Data

Have you ever wondered how to transform your raw data into a customized spreadsheet that provides you with a better analysis of information? Together let's discuss simple and intermediate formulas tested and validated by other districts that can help with doing more with your query download.

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Purchasing Roundtable

Join us in this session to share year-end learnings, troubleshooting tips, insights, best practices, and favorite queries to this roundtable discussion.

How to Implement PeopleSoft ESS Absence Requests and Approvals

This session covers the steps taken in preparation for implementing Absence Requests and Approvals functionality in ESS. You will learn how ESS functions, how to audit and clean up data, how to submit participation form, and how to prepare employees.

Financial Asset Management: Loading Legacy Assets and Other Topics

Did you know that there is a new process for loading Legacy assets into Financial Asset Management (FAM)? In this session, we will show you the asset load process in FAM and other topics.

Putting HCM Best Practices into Practice

Join us to discuss putting best practices in practice! Success during Payroll and accuracy of data relies on planning and communication across departments, timing of data entries, and auditing data. We will focus on available resources (checklists, Payroll Calendar, queries related to payroll, etc.), discuss timing data entry in relation to PeopleSoft and Payroll processes, and much more!