

# PeopleSoft Time-Saving Tricks



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## **HCM Tricks/Tips**

### **Rapid Time**

Running the following queries that will assist with verifying the data needed to input Rapid Time

Run query M\_HR\_EE\_LIST\_WITH\_PAYRATE to verify position numbers, ID#'s and rate of pay

Run query M\_KK\_POSIT\_COMBO\_ACCTS\_LIST to confirm the position's combo code (chartstring)

### **Entering New Hire**

When I am entering a new hire in PS, I open the job data information on an employee in the same position so I make sure I am setting the new employee correctly. This is a time saver for me.

### **Time sheets**

When entering time on the time sheets, I enter and submit at least 10 or more employee's time then I use the approve time feature. It saves on the number of mouse clicks. It might save a micro-increment of time but not a whole lot.

### **Time & Labor**

1. Correct Time Reporter Data: Correct History is not required to fix an incorrect future dated Effective Date. For example, an employee's Hire Date is 11/1/2017 but on 4/20/2018 the Time Reporter Data screen Effective Date was entered incorrectly as 11/1/2018. Since the Effective Date is an incorrect future date of 11/1/2018, you can fix the error without having to submit a Heat Self-Service Ticket (in other words Correct History is not required). Delete the existing future dated record and re-enter it with the correct Effective Date.
2. Entering Time for a Prior Month: For example, during October you need to enter time worked in September. The Date under Change View on the Timesheet Summary screen automatically defaults to today's date of 10/9. The tip is to change the Date from today's date of 10/9 to the first Monday in September, 9/3, that way the Timesheet screen will display dates in September, not
3. Approve Time and Exceptions > Reported Time Screen: When using the "All Time Before" option for View By set the Date to be the first day of the next pay period. The All Time Before" option only lists time worked dates that are before the Date, not equal to the Date. For example, if you set the Date to 10/31 you will not see any time from 10/31, only time up to and including 10/30. Set the Date to 11/1 so you can approve time worked on 10/31.

### **Absence Management**

1. Adjust Balances > Absences Screen Search: Employee 123456 has multiple Empl Records or positions enrolled in Absence Management and you need to enter a sick balance adjustment in the 2018-05 Calendar ID or period for the employee's Empl Record 8 on the Adjust Balances > Absences screen. However, the employee's Empl Record 8 is not listed in the Search Results when searching by just the Empl ID. The solution or tip is to narrow the search criteria by entering the Empl ID, Empl Record and Calendar ID.
2. Review Forecast Results – Example #1: Click the Forecast Details link on the Forecast Results tab under Absence Events on the Absence tab of the Timesheet screen to review all of the fields related to the forecasting errors. The Forecasted Available Balance is the balance after the deducting the hours for the absence event you just entered and forecasted. The Forecasted Total Takes are the total number of hours taken by the employee in the current fiscal year for this absence event type. For example, the employee has a current vacation balance of 7.20 hours but since they work 8 hours per day the system calculated a vacation take of 8 hours for the absence event. The Forecasted Total Takes is 7.20 instead of 8 because there were only 7.20 hours of vacation available to use. This is why the system generated the "You do not have enough balance to cover this absence request - OR - You have not completed the vacation eligibility period yet." error.
3. Review Forecast Results – Example #2: Click the Forecast Details link on the Forecast Results tab under Absence Events on the Absence tab of the Timesheet screen to review all of the fields related to the forecasting errors. The Forecasted Available Balance is the balance after the deducting the hours for the absence event you just entered and forecasted. The Forecasted Total Takes are the total number of hours taken by the employee in the current fiscal year for this absence event type. The Forecasting is the end result from clicking the Forecast button. The Original Eligibility Check Amt is the number of days an AB 1522 employee must work (feet on the floor) before they are eligible to use an absence. The Original Eligibility Day Count is the number of days the AB 1522 employee has worked (these days are counted from Payable Time). The FY Eligibility Check Amt is the number of days an AB 1522 employee must work each fiscal year before they are eligible to use an absence. The FY Eligibility Day Count is the number of days the AB 1522 employee has worked so far in the current fiscal year (these days are counted from Payable Time). For example, the AB 1522 employee has only worked a total of 4 days in the current fiscal year so

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they are not eligible to use a sick absence even though their balance of 3.63 hours covers the 3 hour absence. This is why the system generated the "You do not have enough Sick balance to cover this absence request, OR - You have used all of your probationary period Sick Leave, OR - You are not yet eligible to take Sick Leave." error.

4. Add Comments to Approved Absence: Use the Absence Event screen to add comments for an absence that has already been approved instead of the Absence tab on the Timesheet screen.. When you add a comment for an approved absence using the Timesheet screen the system will require you to re-forecast, re-submit and re-approve the absence event.

## **Finance Tricks/Tips**

### **Processing P-Card PO's**

When creating the PO, click on the Schedule icon and then click on the tab "Matching" and change the matching from Full Match to Do not Match. After the order delivers, receive in PeopleSoft, and then the PO will automatically close after 15 days of non activity.

### **Uses the upload system for journal and budget journal entries.**

Budget Uploads: BUDGET TRANSFER - PEOPLESOFT.xls and BudgetJrnUpload\_Template\_v2.xlsx

General Journal Uploads: Mod\_JRNL1\_PROD\_v2.xls

### **PO**

1. A very good time-saving trick/tip is to set the PO dispatch method to email and enter the supplier email address as well as the buyer's email address (or just the buyer's email address) so the buyer is emailed a copy of the PO with any attachments when dispatched. This saves time so you don't have to go to the Process Monitor and print and/or save PO's from there. The buyer will then always have an electronic copy of the PO to reference making it easier to follow up with the supplier or provide the PO to the school site if needed.

2. At La Mesa - Spring Valley School District we save all of our PO's to a shared network folder too! Any of the buyers or the Director can see if the PO has been received, when, and note the receipt number for any PO in PeopleSoft! (PO information is available is the staff is on vacation and someone asks about a PO)

## **Other Tricks/Tips**

**Created Excel templates** that pull in data from queries and provide needed information:

1. Budget Report Template: provides Budget Summary Report, Budget Detail Report, Summary by Resource & Site
  - FAR\_BUDGET\_DETAILS\_LEDGERS
2. Journal Entry Report Template: provides Journal Entry Summary, Journal Entry Accounting Detail
  - FAR\_GL\_DETAILS
3. Accounts Payable Report Template: provides Item Summary, Accounting Detail, Vendor Summary
  - FAR\_AP\_SUBLEDGER\_PAYMENTS\_ONLY
4. MYP Report: provides FTE Assumptions Sheet, Net Change for PY/CY/(3)BY/5-year Net Change for Salary/Retirement/ER Taxes/Health Increase, Chart of MYP Increased Cost, Detail by person/position and ChartString
  - FAR\_POSITION\_W\_EE\_AND\_ACCOUNT
  - M\_HR\_EE\_VALIDATION\_DIST\_PROMPT
  - M\_TL\_PAYABLE\_TIME\_AUDIT\_SUM
  - M\_BN\_HEALTH\_CURR\_ENROLLMENT
  - M\_PY\_ADDL\_PY\_VALIDATION\_COMBO
  - M\_HR\_SAL\_GRADE\_STEP
  - M\_PY\_MCOP\_VALIDATION

**Performs the Save Search Criteria** in GL Journal and Budget Journal to do a quick search of journals that the user needs to look for. The parameters are defined for the search. The saved search can be deleted, as well.

**"Make Favorite"** the screens you use the most.