

# PeopleSoft Training Activity Sheet

## INTRODUCTION TO PEOPLESOFT - HCM

For use in training. Last updated October 25, 2016.

### Activity 1: Searching for Records (Personal Information)

**Directions:** Navigate to **Main Menu > Workforce Administration > Personal Information > Personal Information**. Make sure you are on the **Find an Existing Value** tab. Answer the questions about employees' personal information in the training database at District 063.

1. Find **Empl ID 226838**. You might notice the name **Tori Amos** appears as you type. Click **Search**.
  - How many tabs appear on the **Personal Information** screen? \_\_\_\_\_
  - What is **Tori's** date of birth? \_\_\_\_\_ Last 4 of **SSN**? \_\_\_\_\_
  - View the scanned document (PDF) on her record. What is it? \_\_\_\_\_
  - What is **Tori's** home phone number? \_\_\_\_\_
  - Click **Return to Search**. Notice the **Empl ID** is filled in. Clear the results.
2. Find **Tammy Fae Baker**.
  - Which field did you use to search for her record? \_\_\_\_\_
  - What is **Tammy Fae's** **Person ID/Employee ID**? \_\_\_\_\_ What is the significance of IDs that start with 600? \_\_\_\_\_
  - How many phone numbers does she have listed? \_\_\_\_\_ Which is her preferred #? \_\_\_\_\_
  - Turn on **Include History** (orange button at bottom of screen). Click **View Address Detail**.
  - What is the effective date of **Tammy Fae's** address at 1600 Pennsylvania Ave? \_\_\_\_\_ (If you didn't have **Include History** on, you wouldn't be able to see the previous address.)
  - Click the last portion of the breadcrumb (**Personal Information**) to go back to where you started. Notice the **Empl ID** is filled in. Clear the results.
3. **Try these searches:**
  - a. What happens when you search with no criteria entered? \_\_\_\_\_
  - b. Search **Empl ID** *begins with* "1." How many records return? \_\_\_\_\_  
NOTE: 300 is the max that will return on a search.
  - c. How many last names *begin with* "jack"? \_\_\_\_\_ How many last names *contain* "jack"? \_\_\_\_\_  
How many last names = "jack"? \_\_\_\_\_
  - d. How many employees have IDs *greater than* 604000? \_\_\_\_\_
  - e. Find **Courteney Cox (303415)** *without* **Include History** turned on – look in the **Name** area.  
How many records are displayed? \_\_\_\_\_
  - f. Find **Courteney Cox (303415)** *with* **Include History** turned on – look in the **Name** area.  
Now how many records are displayed? \_\_\_\_\_ Use the arrows to go between the records.
4. Add the **Personal Information** screen to your Favorites. Add it with the default name ("Personal Information").

# Activity 2: Searching for Records (Job Data)

Directions: Navigate to **Main Menu > Workforce Administration > Job Information > Job Data**.

1. Find these 3 employees in the training database at District 063. Answer the questions about their job data.

Employee	Questions		
<b>Tori Amos</b> <b>226838</b> 1 job record at this district	Work Location tab Position # and Position Name?	Work Location tab Which school is she at?	Job Information tab Who does she report to?
<b>John Mellencamp</b> <b>262562</b> 1 job record at this district	Work Location tab Position # and Position Name?	Job Information tab Full time or part time? 10, 11, or 12 months?	Compensation tab What is the frequency of pay? What is the compensation rate?
<b>Sandra Bullock</b> <b>114122</b> 3 job records at this district	Work Location tab For Empl Record 0, which Department # and Dept Name?	Salary Plan tab Plan/Grade/Step? Click the magnifying glass next to Plan to see its name.	SDCOE Job Data tab Which month doesn't she get paid?

2. Try these searches:

- What happens when you search with no criteria entered? \_\_\_\_\_
- Search Empl ID *begins with* "1." How many records return? \_\_\_\_\_ Take a close look – one record per employee? (Y/N) \_\_\_\_\_
- Find **Eddie Murphy (188641)**. How many records return? \_\_\_\_\_ What is the difference between Eddie's records? \_\_\_\_\_
- Find 1-3 other employees with multiple records and investigate the differences between the records. TIP: Make use of **Next in List/Previous in List** to flip through records.
- Find an employee without **Include History** turned on and look at the Work Location rows (1 of 1).

The screenshot shows a 'Work Location' history window with the following details:

- Effective Date: 01/01/2016
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Pay Rate Change
- Reason: Salary Increase(By Percent)
- Job Indicator: Primary Job

Then click **Include History** and review the Work Location history. Most employees have multiple rows.

3. Add the **Job Data** screen to your Favorites. Add it with the default name ("Job Data").

# Activity 3: Run a Report

**Directions:** Navigate to **Main Menu > Payroll for North America > Payroll Processing USA > Pay Period Reports > Deduction Register**. Refer to the directions in the Intro guide for the basic steps on running a report.

1. Run this deduction register report.

- Click **Add a New Value** and add a run control ID (must be one word): *DEDUCTIONREG\_[Your initials]*
- Enter the parameters. For this exercise, enter **Pay Run ID** of *M08AUG16*, select **Company** = *063* and **Payroll Cycle** = *On-Cycle*.

- Click **Run**. Select the desired report and format. Notice **Deductions Register (PAY001)** is already checked. Leave it as a PDF. Click **OK**. This runs the report.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Deductions Register	PAY001	SQR Report	Web	PDF	Distribution

- What is the **Process Instance #**? \_\_\_\_\_
- If you want to check the status, go to **Process Monitor**. Look for *Success/Posted*. Click **Refresh** (repeatedly). Use the “Go back to...” link to get back to the previous screen.
- The easiest way to get the report is from **Report Manager > Administration tab**. Look for your process instance number. Click the link to retrieve the report (PDF).
- Were you successful in opening the PDF? (Y/N) \_\_\_\_\_

2. Add this report to your Favorites. Add it with the default name (“Deductions Register”).

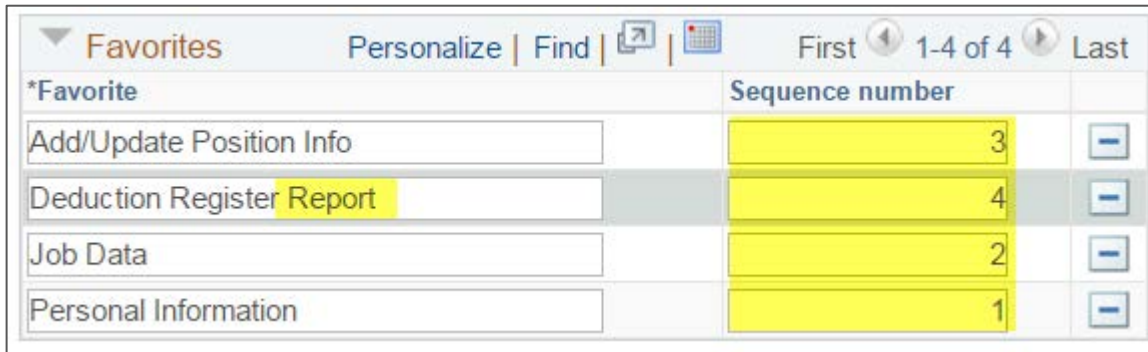
3. **True or False:** Every time you run a report, you always enter/find the run control ID, enter the parameters, click Run, monitor the report process (if desired), then view the report. \_\_\_\_\_

**If you have extra time:** Repeat these steps to run the same report but this time generate it for February 2016. Start from the beginning at the Deduction Register screen, on the Find an Existing Value tab, and search for your existing run control. When the parameters open, change *M08AUG16* to *M09SEP16*. Click Run. Repeat the steps above to retrieve the report.

# Activity 4: Add/Edit/Delete Favorites

**Directions:** Add, edit, and delete your Favorites.

1. Add one more screen to Favorites. Navigate to **Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info**. Add it with the default name (“Add/Update Position Info”).
2. Go to **Favorites > Edit Favorites** and rename your Favorites and the sequence. Save. Review.
  - Deduction Register – Change to “Deduction Register Report”
  - Sequence them 3, 4, 2, 1 (just an example so Personal Information will be first)



*Favorite	Sequence number	
Add/Update Position Info	3	-
Deduction Register Report	4	-
Job Data	2	-
Personal Information	1	-

3. Delete your Favorites. Go to **Favorites > Edit Favorites**.
  - Click the **minus sign (-)** for each favorite to remove all of them. Click **Save**.
  - Review your Favorites in the menu. They should be gone. Only Recently Used should be left.

