san diego county office of EDUCATION
FUTURE WITHOUT BOUNDARIES℠

Employee Names vs User Names

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M_EMPLOYEE_VS_USER query

An employee has an employee record and a user record in PeopleSoft. In HCM you can run the **M_EMPLOYEE_VS_USER** query for a list of Employee/User names and their Employee/User email addresses.

	A	B	C	D	E	F	G	H
1	**Unit**	**ID**	**HR Status**	**Personal Info Name**	**Warrant Name**	**User Profile Name (CRC)**	**Personal Info Email**	**User Profile Email**
2	00600	123456	A	Bruce Lee	Bruce Lee	Bruce J Lee	blee@district.net	DRamos@cherryroad.com
3	00600	123457	A	Loretta Lynn	Loretta Lynn	Loretta Lynn	e@e.net	DRamos@cherryroad.com
4	00600	123457	I	Loretta Lynn	[illegible]	[illegible]	e@e.net	DRamos@cherryroad.com
5	00600	123458	A	Janet Jackson	Janet Jackson	Janet Damita Jackson	jjackson@district.net	DRamos@cherryroad.com
6	00600	123459	A	Nick Cannon	Nick Cannon	Nick Scott Cannon		DRamos@cherryroad.com
7	00600	123460	A	Sylvester Stallone	Sylvester Stallone	Sylvester G Stallone	e@e.net	DRamos@cherryroad.com

SAMPLE RESULTS

- **Column A - Unit.** This is your district #.
- **Column B - ID.** This is the employee's ID.
- **Column C - HR Status.** "I" stands for inactive HR status. Some employees might have multiple employee records, of which there are both active (A) and inactive (I) ones.
- **Column D - Personal Info Name.** This is the name that is entered at Main Menu > Workforce Administration > Personal Information > Personal Information. It should reflect the legal name.
- **Column E - Warrant Name.** This is the warrant name entered at Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names. On this screen you can enter an alternative warrant name if one is provided. NOTE: At conversion, if an employee existed in Legacy, the Warrant Name and SS Names were brought in on the Warrant Name screen. If you need to change an employee's name, be sure to check the Warrant Name screen, too. If it is a brand new employee, you do not need to add it to the Warrant Name screen.
- **Column F - User Profile Name (CRC).** This is the name on the PeopleSoft *user* account and is different than the employee record. Only the CRC can change the user profile name at this time (submit a HEAT ticket). When your district went live, the user names might have been loaded "Last First" or "First Middle Last" or "First Last." This name displays on:
  - **HCM:** My Profile, My Personalizations, and Change Password screens. If you have the M_ABSENCE_APPROVER role, it will show up in the HCM Worklist.
  - **Finance:** Requester and Buyer on all purchasing screens; Originator and Approver in workflow for all transactions; Finance Worklist.
- **Column G - Personal Info Email.** This is the email address that is entered at Main Menu > Workforce Administration > Personal Information > Personal Information. Some districts allow employees to update this in Employee Self-Service. The system sends messages to this email address for:
  - TB test email notifications
  - Credentials email notifications
  - For organizations that use Absence Requests: Absence Request email notifications are sent to the employee (requester)
- **Column H - User Profile Email.** This is the email address on the user account and is changed by you (user) in PeopleSoft ESS, Portal, or HCM from Main Menu > My (System) Profile. Additionally, the staff within your organization who handle your password resets can change the User email address from the Distributed User Profile screen that they access. The system sends messages to this email address for:
  - Workflow email notifications for approvals
  - Password reset email with temporary password
  - For organizations that use Absence Requests: Absence Request approval email notifications are sent to the manager (approver)

FAQs

Q: Why might an employee's name show up one way on a screen (First Last) and different on another screen (First Middle Last) in PeopleSoft?

A: Typically this is because they have a user name that is different from their employee name.

Q: What is the difference between an "employee" and a "user"?

A: The *employee* record is entered in PeopleSoft HCM (typically by the HR Department). For a new hire, this is entered at Main Menu > Workforce Administration > Personal Information > Add a Person. For editing an employee's name/email address, this is done at Main Menu > Workforce Administration > Personal Information > Personal Information.

The *user* record is created by the system (or by the CRC manually, if necessary).

- District enters job data in HCM.
- 7:00 PM: A scheduled job (M_HR_CRT_ID) runs nightly at 7 pm and creates a basic user profile.
    - User ID (pulls from Personal Data)
    - Description (pulls from Personal Data)
    - Email address (pulls from Personal Data)
    - Primary permission list
    - Assigns the default temporary password (First 4 of LAST NAME IN CAPS + Last 4 of SSN)
- 9:00 PM: Another process (DYNROLE_PUBL) runs at 9 pm and looks for all active employees.
    - This process assigns "basic roles" to any new user with an active employee record so the employee can log into PeopleSoft ESS (to view paycheck, for example) and Portal.
- If the user will need to use Finance or HCM, you (your organization's PeopleSoft contact) submit a HEAT Ticket with the requested role assignments.

Q: Is there something I should do when an employee leaves my organization to close out the user account?

A: Yes! Submit a HEAT ticket to indicate that the employee has left and the PeopleSoft access needs to be removed. The CRC will log into HCM and Finance and removes all roles; leave the Primary Permission list as is; leave M_EMPLOYEE role so the employee can still view paychecks in ESS. If you want the employee to have no access at all, please indicate that you would like the CRC to lock the account (cannot view paychecks).

Q: Where are email addresses entered and how are those email addresses used?

A: The *employee* email address is entered at Main Menu > Workforce Administration > Personal Information > Personal Information. Some districts allow employees to update this in Employee Self-Service.

The *user* email address is entered by the employee at PeopleSoft ESS, Portal, or HCM from Main Menu > My (System) Profile. Additionally, the staff within your organization who handle your password resets can change the User email address from the Distributed User Profile screen that they access.

Q: FAQ 91529 from http://crc.sdcoe.net/resources/faqs: Empl ID 123456 - last name was changed to Jackson in Personal Data and shows accurately in the system. EE is concerned that her paystubs still show her previous last name of Washington. Can you make sure the change is reflected on her paychecks going forward? Thanks!

A: The issue is that the warrant name wasn't updated. These directions are in the HR3 guide but are also included here. 1. Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names. For Warrant name, click on Edit Name History. 2. Enter Effective Date of name change. 3. Click Edit Name. 4. Make desired change. 5. Save.