UNIVERSITY OF MISSOURI
PeopleSoft End User Training

NAVIGATION BASICS & INQUIRY
AN OVERVIEW FOR THE END USER

PEOPLE SOFT HRMS RELEASE 8.9
JUNE 2006
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PeopleSoft 8.9 Navigation Basics

Welcome to PeopleSoft release 8.9! This course covers basic concepts, terminology, and navigation techniques for PeopleSoft 8.9 applications using a browser-based interface to view and update data. You may already be familiar with some of the information in this user guide since in some cases it is about accessing web pages in general.

**Goal**

To have the skills and knowledge necessary to use PeopleSoft release 8.9 for Human Resources.

**Participant Objectives**

At the end of this module you will be able to...

1. Sign on to PeopleSoft 8.9 using an Internet browser.
2. Access different PeopleSoft 8.9 databases
3. Access the PeopleSoft home page and universal navigation header.
5. Recognize and use hyperlinks.
6. Utilize search pages to find records in the database and view data.
7. Understand how to use update pages for entering data.
8. Understand how data is displayed in PeopleSoft grids.
9. Open a new window to view data without losing an unfinished transaction.
10. Use favorites to save URLs within PeopleSoft to enable quick access to frequently used pages.
11. Understand PeopleSoft terminology.
12. Use this user guide as reference material and know who to call if you have additional questions.

**NOTE:** The screen shots in this document are only examples of what you will see on your workstation when using PeopleSoft release 8.9. What you actually see may vary due to your access or slight modifications to screen design.
A. BASIC CONCEPTS

1. PeopleSoft 8.9 Internet Architecture

PeopleSoft release 8.9 makes use of Internet technology to bring you PeopleSoft applications. Since there is no software actually installed on your computer, you can conveniently and securely sign on to PeopleSoft from any computer that is connected to the Internet by using a web browser.

PeopleSoft Internet architecture merges PeopleTools technology and World Wide Web technology to deliver view and update functionality through web pages. Here's a diagram of how it works:

PeopleSoft 8.9 applications are made up of a navigational structure that uses menus, submenus, hyperlinks, and web pages. If you've ever browsed the Internet, you'll find PeopleSoft Internet architecture is a simple, intuitive way of working with the database.

PeopleSoft 8.9 works with the following web browser/operating systems:

<table>
<thead>
<tr>
<th></th>
<th>IE 5.5</th>
<th>IE 6</th>
<th>Netscape Communicator 7</th>
<th>Netscape Navigator 7</th>
<th>Firefox 1.0</th>
<th>Mozilla 1.7</th>
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<tr>
<td>Linux</td>
<td>X</td>
<td>X</td>
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<td>Mac OS 9</td>
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<tr>
<td>MAC OS X</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>MS Windows 2000</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<td></td>
<td>X</td>
</tr>
<tr>
<td>MS Windows 2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MS Windows 98</td>
<td>X</td>
<td>X</td>
<td></td>
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<td></td>
<td>X</td>
</tr>
<tr>
<td>MS Windows NT</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MS Windows XP</td>
<td>X</td>
<td></td>
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<tr>
<td>Unix</td>
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**NOTE:** There is a glossary at the end of this guide. If you come across a word you don’t understand, please use the glossary to see a definition of the term.
2. Signing in to a PeopleSoft 8.9 Application

Signing in to PeopleSoft is just like accessing a secure page on a web site.

First, open a web browser, such as Internet Explorer. This can be done by clicking on the Internet Explorer icon, from the Start menu, on your computer. Then, type in the URL for the PeopleSoft 8.9 database you are trying to access (see URLs on pages 11-12). **NOTE:** Instead of typing in the URL every time you need to sign in to the site, you may set the URL as a Favorite (to learn how to set Favorites see pages 34-36).

When the sign in page displays, enter your user ID, press tab, and enter your password. Note that for the production databases these are the same as you use for e-mail (also referred to as Exchange ID, SSO ID, or NT ID). Notice that for security purposes, when you type the password, it will be shown with black dots instead of the actual characters. **Remember that the password is case sensitive.**

**PeopleSoft 8.9 Sign In Page:**

![PeopleSoft Sign In Page](image)

After you type in your password click **Sign In** or press Enter. PeopleSoft will authenticate your user ID and password. If the sign in information you entered is valid, the system
will display the PeopleSoft home page. This is an example of what you'll see after signing in:

You are now successfully signed in to the PeopleSoft 8.9 application!

Notes:
If you receive an error message in red text just below that reads: “Your User ID and/or Password are invalid,” try reentering your user ID and password. REMEMBER that the user ID and password are the ones you use for e-mail and that the password is case sensitive. If reentering the information doesn’t work contact your local help desk and they will help you to reset your sign in information. The error message and help desk numbers are displayed below.

**WARNING!** For security purposes, the PeopleSoft system signs you out of the application without saving your input after a 60-minute period of inactivity. Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire (see screen shot of the warning message below). You then have the option of continuing with your current session by clicking the OK button in the warning message:

If you do not respond within two minutes, the session ends and you will receive the following message:
To return to the application after being timed out, click the Sign in to PeopleSoft link. The sign in page will display, and you can sign in to the application again.

Web Site Security

The PeopleSoft application is accessed through a secure web site. You can verify that it is "secure" because the URL starts with https instead of http and there will be a lock displayed at the bottom of the web page.

Notes:
3. Data Integrity and Help Desk Support

Because data may be stored in multiple tables, is viewed by many users, and may be utilized for reporting purposes, all information entered into PeopleSoft should be as accurate as possible. Please consult the training guide for the specific process you are trying to complete if you have questions about that process. Training guides are available at this URL:

http://umsystem.edu/ums/departments/is/peoplesoft/training/upgrade8.9/

And, if you’ve reviewed the training guide and still have questions about using PeopleSoft to do your job, please contact local numbers given on the web pages at this URL for application support:

http://www.umsystem.edu/ums/departments/is/peoplesoft/

Notes:
4. Accessing Different PeopleSoft 8.9 Databases

Depending on your duties you may use different PeopleSoft databases to perform different functions. To access different databases you will use different URLs. This means that a user accessing the Student Administration 8.9 application or the Finance 8.8 application would not be able to access the Human Resources 8.9 application from the same URL.

a. Accessing the Training Database In Class

You are accessing a training database during classroom training. This database is not to be used outside of classroom training. The information in this database is not real. The production database to which you receive access after training will be actual data and will look slightly different than the training database. In training classes you will access the training database at this URL:

HRTRN89:  https://psdev.umsystem.edu:8004/HRTRN89/signon.html

To access the PeopleSoft training database in class go to the URL above. You will receive a sign-on screen allowing you to enter a User ID and Password. For our training here today, the User ID and Password are as follows:

**Departmental Inquiry**

User ID: OA  
Password: TEST89

**Processors Inquiry**

User ID: FO  
Password: TEST89

**Processors – Correction**

User ID: FOCORR  
Password: TEST89

b. Accessing the Training Sandbox After Training

The training sandbox is a database in which you can practice what you learn in training. This database does not update production data and is refreshed periodically, with copies of production data, so you can “play” and learn in the sandbox and make mistakes without impacting real data. Access the training sandbox at this URL:

HRTRT89:  https://psdev.umsystem.edu:8004/HRTRT89/signon.html

User IDs and passwords:
c. Accessing the Production Databases

The “production databases” are where you will view and update real information in PeopleSoft. There are two production databases, Production (also referred to as HRPRD89) and Reporting (also referred to as HRRPT89). The information in these databases is real data and is virtually the same. The Production database, however, contains live, up-to-the-minute data, and Reporting is refreshed from Production nightly. To run queries, use the Reporting Database. Only if you need to inquire on something that was entered the same day should you use the Production database. After you get your access approved and set up you will access PeopleSoft using one of these URLs:

Production Database:  https://hrprd.umsystem.edu/prd/signon.html
Reporting Database:  https://hrrpt.umsystem.edu/rpt/signon.html

NOTE: Some PeopleSoft data is updated by nightly batch processes. This may mean that entries made today, for example, may affect transactions that you won’t be able to view until tomorrow.
5. PeopleSoft 8.9 Home Page

The introductory page, called the home page, is the initial entry point into PeopleSoft and will indicate to the user a successful sign on into the PeopleSoft application. After you sign in to the PeopleSoft application this is an example of what you'll see:

![Image of PeopleSoft 8.9 Home Page]

**NOTE:** Use the **Back button** with caution. If you are entering data and click the Back button, the data will be lost. This guide will show you how to navigate to previous pages by using other buttons and links in the PeopleSoft application.

The **Universal Navigation Header** is displayed at the top of every page in PeopleSoft.

This is the **Main Menu**.

**NOTE:** You may have more, fewer, or different menu items than are displayed in the screen shots in this document. The menu display is dependent on your individual security set up.

a. Using the Universal Navigation Header

**Home.** When you click this hyperlink, no matter where you are in the application, you will return to the home page. If you have begun data entry and have not saved, you will see this warning message display:
Click **OK** to go back to the page and save your work, or click **Cancel** to close the page and return to the home page without saving.

**Add To Favorites.** Click this hyperlink to add a Favorite within the PeopleSoft application. This is similar but not the same as adding a favorite to your Internet browser. These two types of favorites are explained in detail starting on page 33.

**Sign Out.** Click this link to sign out of the application and return to the sign in page. The sign in page displays to confirm a successful sign out. Once you've signed out, no one can access the site from your computer. **Important!** For security purposes it is important that you use the sign out link when you are finished with your PeopleSoft session instead of simply closing the browser window. Whenever you access a secure site, it is recommended that you sign out to prevent another user from accessing the site through your browser window.

b. Using the Main Menu

The home page contains the main menu, which is a general list of the areas you can link to in the PeopleSoft application.

On the left is an example of what the main menu looks like before it is expanded. Note that your main menu will contain only the menu items you have been granted security to access, so it may have more, fewer, or different items on it than the one in the screen shot. Navigation using the main menu consists of a hierarchy of folders. Expanding and collapsing these folders is the primary means of getting around the PeopleSoft application. A right-facing arrow before a listing like this means there is more under this menu item. Click **to expand the menu further. A dash before a listing**
(→) indicates that it is a direct link to pages where transactions are performed and that the menu item is expanded as far as it goes. These direct links each represent a specific transaction or view of data already entered.

The buttons at the top right of the menu refresh ☰️, minimize ⏹️, or close ❌ the menu. The refresh button returns the menu to the home state. You may minimize the main menu as necessary to see more of the page.

Use the Search feature at the top of the main menu to search for a page within the application. Enter the name of the page you want to find and press Enter or click ⏯️. This action opens the Search page displaying the results. If your search produces a large number of results, modify your search criteria and select the Search Within Results option, then Find, to narrow your search further.

c. Using the Navigation Folders and Page Links

In addition to the main menu, PeopleSoft applications include navigation folders, which serve as alternatives to the main menu. These navigation folders provide a user-friendly navigation tool in the form of task-driven folders that provide intuitive access to the pages needed to complete your transactions. Inside each folder are the links that take you directly to the pages you need to access. Page links are displayed as hyperlinks, meaning that you can click the underlined word to open the selected page.

In the sample screen shot below, when you select the words Workforce Administration and then Job Information from the main menu, the right window displays subfolders containing all of the page links available to you. In this example, under the Job Information main folder there are three subfolders: Contract Administration, Review Job Information, and Reports. There are also direct links to the Job Data and Pay Rate Change pages.

The main menu, the navigation folders, subfolders, and page links are the tools you’ll use to navigate to the pages in PeopleSoft 8.9 where you’ll do your work.

We call this record of where you have navigated the “breadcrumbs;” This is the trail showing how you got to the current page. This is especially helpful if you’ve minimized the main menu.

By selecting any of these hyperlinks, you may quickly navigate back to these places in the application.

Page links are hyperlinks to the pages on which you will perform transactions. Each page link represents a specific set of data or a procedure that includes the steps and pages needed to complete data entry.
If the main menu is used for navigation, there are two ways to view submenus:

1) You may click on the arrow to view submenus under that folder. However, the submenus will only display in the menu bar, the folders will not display on the right side of the screen.

2) You may click on the actual word to view submenus. When the word is selected, the submenus display in the left menu bar and the folders also display on the right side of the window, with the page links in each folder also displayed.

Note that when you see a dash in front of a menu item, like the example below, it is an indication that there are no submenus or subfolders available beneath the item. To access items preceded by a dash, click on the word (hyperlink).
d. Accessing Hyperlinks (Page Links)

To access a hyperlink, click the underlined word for the task you wish to use. Page links are in the menu (left side), in folders (right side) or in “breadcrumbs” (top left).

For example, Job Data is contained within the Job Information Menu. To get there, select: Workforce Administration > Job Information > Job Data.

Notes:

These are the “breadcrumbs.”

Hyperlinks
e. Closing, Refreshing, and Minimizing the Main Menu

When you first sign in, the main menu looks like the one pictured here, with more or fewer menu items depending on your individual security.

There are three buttons on the top of the main menu:

**Refresh** – Click this button to clear or reset the main menu. You will want to do this if the menu gets expanded because of activity you want it returned to the home state.

**Minimize** – Use this to hide the main menu, to free up space on your PeopleSoft page. When you minimize the main menu before selecting an item, you will be able to maximize it at any time by clicking the maximize button which will display whenever the menu is minimized.

**Close** – **DO NOT USE THIS BUTTON.** Closing the menu means that the main menu will be completely gone and you will be unable to re-open it or access any of the page links listed as menu items.

**Notes:**
After you select an item from the menu, the top of the main menu changes and looks like the one pictured on the left. Now only the minimize button is available. At this point (after you've selected a page), if you minimize your main menu, you will be able to maximize it (or reopen it) again by selecting the expand button. The expand button will be available in the upper left hand corner, where the menu was previously displayed like the one pictured below.

Use the maximize button to re-display the main menu when it has been minimized.

Notes:
6. Conducting a Search

When you open a task (using a hyperlink or page link), either an entry page will display or a search page will appear prompting you for search keys needed to locate a record.

This is an example of a search page, also referred to as Find an Existing Value:

To find a record, or many records, search criteria must be entered, then click Search and a Search Results page displays.

Notes:
Search keys – Key data elements that may be used when a search is conducted. For most searches in PeopleSoft Human Resources, EmplID is a search key.

Operators – Conditions that can be changed which allow a search to be done with limited information. A common operator is equal to (=). When this is used, the search results will return records that are exactly the same as the entered data. For example, if Campus ID = ROLLA, all search results will have a campus ID of ROLLA.

Search fields – Fields for entering data to be used in the search process. In the search process, all fields do not need to be used. A search may be successful using only one search field.

Once you have entered in the search criteria key fields, click Search to process the search. If you wish to refresh the page (without saving), so you can enter new or different criteria, click Clear.

Notes:
In the example below, the first EmplID criteria is enough information to find the desired record.

First, enter the EmplID and change the operator to “=”. Since each employee is assigned a unique number, it is easiest to complete the search by EmplID if you know it. Then, click Search.

NOTE: You will not need to enter data in all of the search fields. If you have a unique identifier for a record, such as EmplID, your search will be easily completed.

a. Operators

A down arrow next to an operator indicates the availability of a drop-down list. There are various search options available that allow for enhanced search capabilities.

For example, if you know that the employee’s last name is Mayer, “=” would be used with the exact and full last name to find that employee:

Last Name: = Mayer

However, if only the first few characters of the last name were known, MAY could be entered in the field and the search option of “begins with” could be utilized:

Last Name: begins with MAY

The wildcard (%) can be used for either numerical or alphabetical characters. As a “wildcard” it instructs the application to search for the known values and stands in place
of unknown values. The wildcard could be used in the following ways to search for the data MAYER:

= %YER
= MAY%
= %MAY%

**NOTE:** Numbered items, like EmplID, may require preceding zeros when searching by exact number.

<table>
<thead>
<tr>
<th>Operators</th>
<th>How and when to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>begins with</td>
<td>If you know the first part of the search key only</td>
</tr>
<tr>
<td>contains</td>
<td>If you know the search key includes certain values</td>
</tr>
<tr>
<td>=</td>
<td>If you know the exact word or number</td>
</tr>
<tr>
<td>Not =</td>
<td>If you want to exclude certain records from being returned</td>
</tr>
<tr>
<td>&lt;</td>
<td>If you want a value less than</td>
</tr>
<tr>
<td>&lt;=</td>
<td>If you want a value less than or equal to</td>
</tr>
<tr>
<td>&gt;</td>
<td>If you want a value greater than</td>
</tr>
<tr>
<td>&gt;=</td>
<td>If you want a value greater than or equal to</td>
</tr>
<tr>
<td>between</td>
<td>If you want a value between two values</td>
</tr>
<tr>
<td>in</td>
<td>If you know the exact number, character fields do not allow</td>
</tr>
</tbody>
</table>

**Notes:**
b. Using Look Up

A magnifying glass next to a field indicates that a look up option is available for the field. When the magnifying glass is clicked, the look up page opens and the needed data, such as EmplID, may be selected.

![Look Up Page](image)

The Look up page to the right is an example of what you would see when you click on the magnifying glass.

The Look Up page Search Results list provides hyperlinks to the valid values resulting from your search. Click a hyperlink for the value you wish to select. Clicking one of these hyperlinks takes you back to the page where you were conducting a search with that particular value entered into the field you were searching on.

Notes:

![Notes Icon]
c. Saving Search Criteria

If you will be conducting the same search multiple times, you may wish to use the Save Search Criteria feature.

To use this feature, complete a search. Then, click **Save Search Criteria**.

**STEP 1** – Complete a search and click **Save Search Criteria**.

**STEP 2** - When the Save Search As page opens, enter a name for the search and click Save.

The saved search will contain these values:

- **EmplID:** begins with 01005901
- **Benefit Record Number:** =
- **Name:** begins with
- **Last Name:** begins with
- **Business Unit:** begins with
- **Department:** begins with
- **Organizational Relationship:** =
- **Alternate Character Name:** begins with
After the search is saved, the following options become available on the search page:

**Use Saved Search** – Use this drop-down menu to locate a previously saved search and use it again. The search is automatically completed.

**Delete Saved Search** – Allows you to delete a search you have named and saved.

STEP 3 – To use a Saved Search, click on the drop-down arrow and select the saved search.

---

Notes:
d. Viewing Search Results

After you press [Search] the Search Results list will display at the bottom of the page.

If your search generates a long list you may need to use the scroll bar to the right of the window to view the entire list. Or, by clicking Ctrl+F you can use the pop-up Find window to locate specific data in your Search Results list.

**NOTE:** The Search Results will only display 300 results. If the search page shows the sentence, "Only the first 300 results..." (see above), then you may want to enter more search criteria to further narrow the search results.

**Clear button** - To clear your search results list and the search criteria you have entered, and begin a new search, click [Clear].

You will see *Processing* flashing in the upper right corner of your PeopleSoft window as your search is being executed.
7. Accessing and Using Pages to View and Update Information

Once you have entered your search criteria, clicked Search, located and selected the record you need to view, this is an example of what you’ll see:

When a hyperlink is selected from the main menu, the pages within the selected activity are always related to each other and usually, represent data that is part of a transaction. There are multiple ways to move between pages. As you finish one page, you may click the folder tab of the next page you want to open. Or, you may select a hyperlink at the bottom of the page to proceed to the next page.

**NOTE:** On a page such as the employee record above, the folder tabs across the top of the page are identical to the hyperlinks at the bottom of the page. Both tabs and hyperlinks are available, to give you more flexibility. You may use either the tab or the hyperlink to get to the next page.

When viewing or entering data, you will access additional pages to view or enter more information.

The yellow buttons at the bottom of the PeopleSoft 8.9 pages each have a specific role. By hovering the cursor over the button, you will see the description and the access key.
The following are buttons that you may see on a PeopleSoft page. All buttons will not be available on every page. Access to the buttons are controlled by your security setup.

**Save button** (Alt+1) – Use this to save data and update the entry in the database.

**Return to Search button** (Alt+2) - Click here to return to the search page.

**Next in List button** (Alt+3) and **Previous in List button** (Alt+4) – These buttons bring up the next (or previous) record from the search page when multiple records are retrieved.

**Notify button** – This page brings up an option to send an email, if needed, regarding this entry. The email automatically includes a hyperlink to the transaction you are processing. Only use this if it is needed for the transaction you are processing. If Send Notification is used, be sure to include a subject and enter message text.

**Refresh button** (Alt+0) – The refresh button reloads or renews the screen content for the page you are viewing.

**Add button** – Takes you to the Add a New Value tab for this process.
Update/Display button – Takes you to the Find an Existing Value tab for this process.

Next Tab button and Previous Tab button – Navigates to the next page in the component.

Include History button – Includes all instances of changes to the record.

Correct History button – Enters data correction mode.

Notes:
8. Opening a New Window

There may be times when it would be handy to have multiple PeopleSoft windows open at the same time. Say you are in the process of viewing an employee record when your phone rings and someone wants you to look something up. Rather than close out the employee record before you are finished, you may click the New Window hyperlink and open another window in the PeopleSoft database you were working in:

When New Window is selected, another browser window opens in the PeopleSoft application. The new window displays a copy of the page you were using. From there, another menu item, sub-menu, or page may be selected.

**NOTE:** Although there is no limit to the number of windows you may have open, it is best to close additional windows when you are done with them because having multiple windows open can be confusing.
9. Setting Favorites

A Favorite is a shortcut to accessing frequently used web pages. A Favorite enables the user to save a URL in a location where it may be selected as a hyperlink. This saves time and potential errors in entering a URL.

This user guide will explain two ways of using favorites. Favorites may be used in your web browser, for accessing the PeopleSoft sign in page. And, Favorites may also be set up within the PeopleSoft application, to allow you to easily access the pages you use most often.

The instruction that follows will cover:
- Using Favorites in Internet Explorer
- Using Favorites in PeopleSoft

Notes:
a. Using Favorites in Internet Explorer

A favorite is a feature found in Microsoft Internet Explorer that allows a user to save the locations, or URLs, to their favorite, most frequently accessed Internet locations. In Netscape, bookmarks work the same way. The favorite saves the address as a link so that you can access the selected page by clicking the link instead of typing the URL in the address line of your web browser. You will be shown here how to save the PeopleSoft sign in page as a favorite.

**Saving a Favorite**

In Internet Explorer, you can save the URL for the web page you are currently accessing by pressing Ctrl and D at the same time. Simply click on the web page and then click Ctrl+D. Try this with the PeopleSoft sign in page.

To view the favorite you created, click on the Favorites button from the Internet Explorer toolbar.
The Favorite you created will display in the Favorites list that opens up when you selected the Favorites button:

The Favorites menu opens and the favorite you created, PeopleSoft 8.9 Sign-in, is displayed.

To access page in the future, simply click the link from the Favorites menu.

Notes:
If you only have a few page links saved as favorites, you may not need to organize your favorites in folders. If you’d like to organize your favorites, however, you may create folders by clicking Add, New Folder, and entering a folder name. Or, use the shortcut, Ctrl+B, to organize favorites.

1. Click Add

2. When this pop-up box displays, click [New Folder...].

3. When the Create New Folder box displays, enter a Folder name and click OK. Click OK again.

4. When your folder and links are displaying in the Favorites menu, you may click and drag the links to the folder(s) you have created.
b. Using Favorites in PeopleSoft

Within the PeopleSoft application, the first menu item is called My Favorites. This allows you to save specific page links that you frequently access. It is important to save hyperlinks within PeopleSoft in the My Favorites item on the PeopleSoft main menu because if you save these links in your web browser, they will not open unless you've already signed in to the secure site.

To save specific page links within the application to My Favorites, do the following:

Access the PeopleSoft page that you want to save in My Favorites. Then, click on the page link Add to Favorites (in the upper right hand corner of the page):

Notes:
When the Add to Favorites page opens, enter a description for the favorite and click OK.

After creating a favorite in PeopleSoft, you may edit your favorites. You may change a favorite name or change the sequence of the favorites you have created.

To edit a PeopleSoft favorite, select from the main menu: My Favorites > Edit Favorites

After editing click Save.
10. Troubleshooting Page Display Problems

a. Clearing the Cache

A cache is a temporary storage area for frequently-accessed or recently-accessed data. Your computer stores information to make it faster for the computer to recall web sites that you have visited. The problem with this is, when there are new pages or changes to a site your computer may go to the cache first to recall the page. So, you might be looking at the page from your cache that has since been updated.

By clearing the browser cache you see the most recent documents presented on that site. To clear the cache in Internet Explorer, do the following:

1. Open your web browser
2. Click on Tools
3. Click on Internet Options
4. On the General tab under Temporary Internet files, click Delete Files
5. Click OK to close the dialog box
6. Hold down the SHIFT key and click Refresh on the toolbar to reload the page

b. Pop-up Blocker

Your internet browser pop-up blocker needs to be set with pop-up blocker turned off. If pop-ups are blocked when you’re accessing pages in PeopleSoft 8.9, there may be problems with pages displaying, linking to other pages, or viewing pop-up messages displayed by the PeopleSoft application.

In Internet Explorer, you may check or change the setting of the pop-up blocker by doing the following:

1. Click on Tools
2. Click on Pop-up blocker
3. View or change the pop-up blocker setting (for all sites or for only specific sites).

Notes:
11. PeopleSoft 8.9 Buttons and Page Links

The following is an alphabetical list of buttons and page links you will encounter in PeopleSoft with their hot keys, if any, and their functions. A hot key is a key sequence, (or combination of keys clicked at the same time), that performs a defined action. Access to these commands are based on security level. Buttons will be grey if you do not have access.

<table>
<thead>
<tr>
<th>Button or hyperlink</th>
<th>Hot Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Alt + 1</td>
<td>Add a new value</td>
</tr>
<tr>
<td>Add</td>
<td>None</td>
<td>Add mode – go to add a new value</td>
</tr>
<tr>
<td>Add a new row</td>
<td>Alt + 7</td>
<td>Add a new row</td>
</tr>
<tr>
<td>Add to Favorites</td>
<td>None</td>
<td>Add page link for current page to PeopleSoft My Favorites</td>
</tr>
<tr>
<td>Back</td>
<td>None</td>
<td>Navigate back to the previous page</td>
</tr>
<tr>
<td>Cancel</td>
<td>Esc</td>
<td>Return to previous page without saving changes</td>
</tr>
<tr>
<td>Choose a date</td>
<td>Alt + 5</td>
<td>Open a calendar and select a date</td>
</tr>
<tr>
<td>Clear</td>
<td>None</td>
<td>Clears entries from data fields</td>
</tr>
<tr>
<td>Close</td>
<td>None</td>
<td>Closes the window or menu</td>
</tr>
<tr>
<td>Collapse section</td>
<td>None</td>
<td>Hide contents of selected section (for menu items and for grid areas)</td>
</tr>
<tr>
<td>Customize</td>
<td>None</td>
<td>Customize column order and sort order for selected section</td>
</tr>
<tr>
<td>Customize Page</td>
<td>None</td>
<td>Customize tab order for selected page</td>
</tr>
<tr>
<td>Delete row</td>
<td>Alt + 8</td>
<td>Delete the selected row</td>
</tr>
<tr>
<td>Download</td>
<td>None</td>
<td>Download data into Excel</td>
</tr>
<tr>
<td>Escape</td>
<td>Escape key on keyboard</td>
<td>Return to previous page without saving changes</td>
</tr>
<tr>
<td>Expand</td>
<td>Ctrl + V</td>
<td>Expand display</td>
</tr>
<tr>
<td>Expand section</td>
<td>None</td>
<td>Show contents of selected section (for menu items and for grid areas)</td>
</tr>
<tr>
<td>Find</td>
<td>None</td>
<td>Opens find pop-up window</td>
</tr>
<tr>
<td>Find an Existing Value</td>
<td>None</td>
<td>Search page for finding a record that is already in the database</td>
</tr>
<tr>
<td>First</td>
<td>None</td>
<td>Display first record</td>
</tr>
<tr>
<td>Help</td>
<td>None</td>
<td>Link to PeopleBooks</td>
</tr>
<tr>
<td>Home</td>
<td>None</td>
<td>Navigates to home page</td>
</tr>
<tr>
<td>http</td>
<td>None</td>
<td>Copy URL of current page</td>
</tr>
<tr>
<td>Last</td>
<td>None</td>
<td>Display last record</td>
</tr>
<tr>
<td>Command</td>
<td>Key Combination (default)</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Look up</td>
<td>Alt + 5</td>
<td>Look up value</td>
</tr>
<tr>
<td>Minimize</td>
<td>Ctrl + V</td>
<td>Minimize display</td>
</tr>
<tr>
<td>New Window</td>
<td>None</td>
<td>Opens a new browser window</td>
</tr>
<tr>
<td>New Window</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Next in List</td>
<td>Alt + 3</td>
<td>View the next record</td>
</tr>
<tr>
<td>Notify</td>
<td>None</td>
<td>Opens a window for sending an email notification</td>
</tr>
<tr>
<td>OK</td>
<td>Enter key on keyboard</td>
<td>Save changes and return to previous page</td>
</tr>
<tr>
<td>Preview</td>
<td>None</td>
<td>Preview changes before saving</td>
</tr>
<tr>
<td>Previous in List</td>
<td>Alt + 4</td>
<td>View the previous record</td>
</tr>
<tr>
<td>Refresh</td>
<td>Alt + 0</td>
<td>Refresh or reload the page</td>
</tr>
<tr>
<td>Return to Search</td>
<td>Alt + 2</td>
<td>Return to search page</td>
</tr>
<tr>
<td>Save</td>
<td>Alt + 1</td>
<td>Save changes</td>
</tr>
<tr>
<td>Search</td>
<td>Alt + 1</td>
<td>Processes the search once you have entered search criteria in the key fields above the search button.</td>
</tr>
<tr>
<td>Show all columns</td>
<td>None</td>
<td>Display data across page instead of using tabs</td>
</tr>
<tr>
<td>Show previous</td>
<td>None</td>
<td>Show previous row</td>
</tr>
<tr>
<td>Show next</td>
<td>None</td>
<td>Show next row</td>
</tr>
<tr>
<td>Show tabs</td>
<td>None</td>
<td>Show tabs instead of displaying data across page and using scroll bar</td>
</tr>
<tr>
<td>Sign out</td>
<td>None</td>
<td>Sign out of application</td>
</tr>
<tr>
<td>Transfer to</td>
<td></td>
<td>Transfer to selected page for entering details</td>
</tr>
<tr>
<td>Update/Display</td>
<td>None</td>
<td>Update mode – Go to find an existing value</td>
</tr>
<tr>
<td>View All</td>
<td>None</td>
<td>Display all records</td>
</tr>
<tr>
<td>View Related Links</td>
<td>Alt + 6</td>
<td>List related page links</td>
</tr>
<tr>
<td>Worklist</td>
<td>None</td>
<td>Navigates to worklist</td>
</tr>
</tbody>
</table>

**Notes:**
B. Human Resources Inquiry

1. Introduction

In the PeopleSoft Human Resources application there are many tables available for viewing. In this section, you will learn how to navigate to the pages you will use most often for inquiry, how to enter the correct search criteria to return the records you need to view, and how to view the appropriate fields.

We have covered only the most commonly accessed pages for Human Resources. You will use the following menu options for HR/Payroll inquiry:

- **Workforce Administration** – employee and job information
- **Workforce Development** - academic, tenure, and education information.
- **Organizational Development** – position data.
- **Payroll for North America** – additional pay information (e.g., extra compensation), leave accrual, paycheck data

Depending on your security, you may have more, fewer, or different menu items than are displayed in the screen shots for this training guide.

Notes:
2. Using PeopleSoft Searches

When you are searching for information in PeopleSoft, you are prompted to enter criteria to define your search. When searching employee data, a standard set of prompts are provided.

a. Advanced Search

An Advanced Search page requires the entry of at least one search key, but allows for the entry of multiple search criteria. You may search using only one field or a combination of fields. Refer to the table for a definition of each criteria field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description/Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmplID</td>
<td>Enter the employee's PeopleSoft assigned ID. Enter all or the first part of the Employee ID.</td>
</tr>
<tr>
<td>Empl Rcd Nbr</td>
<td>An employee entered in the system multiple times has multiple record numbers. Enter a record number to search for a specific record, or leave blank to retrieve all records associated with the employee.</td>
</tr>
<tr>
<td>Name, Last Name, Second Name, Alternate Character Name</td>
<td>All of these fields function in the same manner. Enter full or partial names to retrieve results based on a name. Use the wildcard (%) with a partial entry when you are unsure of the spelling.</td>
</tr>
<tr>
<td>Field</td>
<td>Description/Instructions</td>
</tr>
<tr>
<td>-------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Include History | Select this option to view all rows of data associated with the record. This displays all historical, current, and future effective dated records.  

**Current**  
A current row within PeopleSoft displays the most up-to-date information available; what is currently happening with the record. For example, the University has an employee named Susan Jones. When Susan was married on December 12, 2001, Human Resources inserted a data row into her record indicating a change of status from single to married, effective December 12, 2001. Unless Susan has a status change in the future, December 12, 2001, will remain her current data row.  

**Future**  
Future rows of data are changes that have not yet taken effect. They are future transactions. If Susan had advised Human Resources of her wedding date prior to it taking place, a row could have been inserted with an effective date of December 12, 2001. Until the effective date passed, the row remained in the system as a future row.  

**Historical**  
History rows are what current and future records eventually become. If Susan’s marriage doesn’t work out and she gets divorced, a row is inserted into her status field indicating a divorce with an effective date defined by Susan. The marriage date, which was the current row, would then become the history record. History records enable you to maintain an accurate online record of changes to your data. This data can then be incorporated into reports or viewed online.
b. Basic Search

The Basic Search uses the same fields presented in the Advanced Search, but the search is limited to a single field rather than all of the fields and the conditional operator is limited to ‘begins with.’ This is helpful if the exact data for a field is known. To retrieve only information for a specific Employee ID, the Basic Search is a good tool. However, searching for a common name using Basic Search, will retrieve a large number of records.

To access the Basic Search, select the Basic Search hyperlink.

Step 1: Select the field to search from the drop-down list.

Step 2: Enter the search criteria.

Step 3: Select Search.
c. Viewing Search Results

Once the criteria has been entered, select **Search** to begin your search.

If there is only one record that matches your search criteria, the information record will open.

If there are multiple matches to your search criteria, the results will display in a list. Use the navigation bar to view multiple pages of search results. Select the record you would like to view by clicking on any of the underlined items in the record.

If an employee has a concurrent job, like Andrew Jackson, you will find multiple employee records as displayed below. The EMPL Rcd# shows which job you are viewing. Employees with only one job will have an Empl Rcd# of 0; concurrent jobs will have an Empl Rcd# 1, 2 and so on. It will be important that you choose the correct employee record for the job you desire to retrieve.

Also note that concurrent jobs in different departments may appear on the list, but access to all concurrent jobs may be restricted based upon what departments you are authorized to view.

Select **Clear** to refresh the page and enter new search criteria.
3. Job Data

Job Data contains several pages of information regarding the employee’s position and compensation. Follow the steps below to access and search for Job Data.

**Step 1**

**Navigate to Job Data:** Select *Workforce Administration > Job Information > Job Data*

**Step 2**

**Enter Search Criteria:** Enter search criteria in any of the fields. Select **Search** to execute your search.
**Step 3**

**Review Search Results:** Job related information regarding the employee will display. Each page is pictured and described in the following sections.

### Work Location

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Empl</td>
</tr>
<tr>
<td>ID</td>
<td>08888888</td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
</tbody>
</table>

### Work Location

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Status</td>
<td>Active</td>
</tr>
<tr>
<td>Payroll Status</td>
<td>Active</td>
</tr>
<tr>
<td>Effective Date</td>
<td>09/01/2005</td>
</tr>
<tr>
<td>Sequence</td>
<td>0</td>
</tr>
<tr>
<td>Action / Reason</td>
<td>Pay Rate Change</td>
</tr>
<tr>
<td>Current</td>
<td>Annual Budget Increase</td>
</tr>
<tr>
<td>Last Asgn Start</td>
<td>12/01/2004</td>
</tr>
<tr>
<td>Last Start Date</td>
<td>12/01/2004</td>
</tr>
<tr>
<td>Assignment End Date</td>
<td></td>
</tr>
<tr>
<td>Last End Date</td>
<td>12/01/2004</td>
</tr>
<tr>
<td>Expected End Date</td>
<td>12/01/2004</td>
</tr>
<tr>
<td>Position Number</td>
<td>00032393</td>
</tr>
<tr>
<td>Position Title</td>
<td>BUSI/TECH/ANALYST-SPCLST</td>
</tr>
<tr>
<td>Position Management Record</td>
<td></td>
</tr>
<tr>
<td>Regulatory Region</td>
<td>USA</td>
</tr>
<tr>
<td>Company</td>
<td>UM</td>
</tr>
<tr>
<td>Business Unit</td>
<td>UMS/IS</td>
</tr>
<tr>
<td>Department</td>
<td>ANTSERV</td>
</tr>
<tr>
<td>Location</td>
<td>9999</td>
</tr>
<tr>
<td>Establishment Code</td>
<td>UM</td>
</tr>
<tr>
<td>Date Created</td>
<td>08/28/2005</td>
</tr>
</tbody>
</table>

### Notes:

- [Image of open book icon]
a. Work Location

Information located on this page includes personnel action/reasons, business unit code (campus), and employee’s home department code.

This information can also be found using *Employee Lookup* under WebTime on the Administrative Web Applications website at [https://webapps.umsystem.edu](https://webapps.umsystem.edu).

Notes:
b. Job Information

Click **Job Information** to open the Job Information page.

This page shows the employee’s benefit status: either regular or temporary; whether full-time or part-time; the standard hours the employee works, the FTE related to the standard hours, and the employee’s jobcode and title.

When **USA** is displayed on a page, click it to expand the section.

This information can also be found using *Employee Lookup* under WebTime on the Administrative Web Applications website at [https://webapps.umsystem.edu](https://webapps.umsystem.edu).
c. Job Labor

Click **Job Labor** to open the Job Labor page.

This page provides information on various seniority dates for union-eligible employees.

<table>
<thead>
<tr>
<th>Date</th>
<th>Control Value</th>
<th>Labor Seniority Date</th>
<th>Override</th>
<th>Override Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/01/2006</td>
<td>9</td>
<td>12/31/2006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**

- This page provides information on various seniority dates for union-eligible employees.
- Details include the effective date, control value, and labor seniority date.
- The page also shows options for override and override reason.
d. Payroll

Click Payroll to open the Payroll page.

This page shows the employee’s pay group (i.e., Bi-Weekly or Monthly). This page also shows the FICA Status (i.e., whether the person is subject to FICA taxes), Tax Location, and Employee Type.

This information can also be found using Employee Lookup under WebTime on the Administrative Web Applications website at https://webapps.umsystem.edu.

Notes:
e. Salary Plan

Click [Salary Plan] to open the Salary Plan page.

Notes:
f. Compensation

Click the Compensation tab to open the Compensation page. This page shows the compensation frequency and rate.

Notes:
g. Um Job Data

Click **Um Job Data** to open the Um Job Data page. This page provides information regarding Benefit Eligibility and Seniority Dates.

![Um Job Data Page](image)

Notes:
h. Um Specific

Click [Um Specific] to open the Um Specific page. This page displays information on I-9, VERIP, work authorization, etc.

Notes:
i. Employment Data

Click [Employment Data](#) to access Employment Information Page.

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Job Information</th>
<th>Job Labor</th>
<th>Payroll</th>
<th>Salary Plan</th>
<th>Compensation</th>
<th>UH Job Data</th>
<th>Um Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Exempt</td>
<td>EMP</td>
<td>ID: 88888888</td>
<td>Emp Id #: 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Find</th>
<th>First</th>
<th>Current</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Assign Start:</td>
<td>12/01/2004</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Start Date:</td>
<td>12/01/2004</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected Job End Date:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected Return Date:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Number:</td>
<td>00033333</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Management Record:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regulatory Region:</td>
<td>USA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company:</td>
<td>University of Missouri-System Admin</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Unit:</td>
<td>UM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department:</td>
<td>Admin Info Technology Sys</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location:</td>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establishment ID:</td>
<td>UM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
This page displays the employee’s business title, employment dates, and work phone if it is maintained in Position Management. Business Title is the same as the title associated with jobcode. It also displays service data - to view this data you must click USA to expand the page.

Employment Information page also displays:

- **Appointment End Date:** This date is used for reporting only—this date does NOT stop pay without the department processing a termination PAF.
- **Working Title**
- **Accrue Tenure:** This indicates the employee is an academic employee—it does NOT mean the employee is accruing tenure.
j. Earnings Distribution

Click [Earnings Distribution] to open the Job Earnings Distribution page.

Notes:
This page displays the job earnings information for the employee. The first section displays the employee’s standard hours, compensation rate, and frequency. The second section displays the funding source for the employee’s salary. The Combination Code is a combination of the MoCode and the Account Code.

### Earnings Distribution Type

<table>
<thead>
<tr>
<th>Earnings Distribution Type</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>08/01/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Sequence</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Indicator</td>
<td>Primary Job</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action/Reason</td>
<td>Pay Perf Chg</td>
<td>Annual Budget Increase</td>
<td>Current</td>
</tr>
</tbody>
</table>

### Standard Hours

- Standard Hours: 40.00
- Work Period: W (Weekly)
- Comp Freq: M (Monthly)

### Earnings Distribution Type

- By Amount

### Job Earnings Distribution

<table>
<thead>
<tr>
<th>Position</th>
<th>Unit</th>
<th>Department</th>
<th>Job Code</th>
<th>Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UNSYS</td>
<td>ANTSERV</td>
<td>2108</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### Earn Code

- GL Pay Type: REGULAR
- Compensation Rate: 3,702.600000

### Notes:

![Notes Icon]

UNIVERSITY OF MISSOURI
ADMINISTRATIVE INFORMATION TECHNOLOGY SERVICES
k. Benefits Program Participation

Click [Benefits Program Participation](#) to proceed to the Benefit Program Participation page.

**Notes:**
This page displays information regarding the employee’s benefit program including Annual Benefits Base Rate, Benefits Status, and Benefit Eligibility.

The Annual Benefits Base will be 0 for Non-Benefit Eligible (NBE) employees.

This Benefit Program can also be found using Employee Lookup under WebTime on the Administrative Web Applications website at https://webapps.umsystem.edu.

Notes:
4. Job Summary

Job Summary provides general job information. The information provided is a summary of the detailed information provided in Job Data. The pages provide a general overview of the employee’s job history at the University of Missouri including positions held, compensation, and work location. Note that Job Summary displays information about only one Employee Record Number at a time.

Follow the steps below to access and search for Job Summary information.

**Step 1**

Navigate to Job Summary: Select Workforce Administration > Job Information > Review Job Information > Job Summary

**Notes:**
Step 2

**Enter Search Criteria:** Enter search criteria in any of the fields. Select to execute your search.

Step 3

**Review Search Results:** Job history information regarding the employee will display. Each page is pictured and described in the following sections.
a. Legacy Information

Click the **Legacy Button** on any Job Summary page to view a history of information that is stored in the Legacy system (older system used before PeopleSoft). Click **OK** to close this window and return to the Job Summary page.
b. General
The General information page provides a history of changes made to the employee’s job record.

### Notes:

![Notes icon]
c. Job Information

Click [Job Information] to open the Job Information page. Job Information provides a history of changes to the employee's employment status.

Notes:
d. Work Location

Click to open the Work Location page. Work Location provides a history of department transfers.

Notes:
e. Compensation

Click [Compensation] to open the Compensation page. Compensation provides a salary history for the employee.

---

**Notes:**

![Notes icon]
5. Faculty Education

Access formal education for faculty by accessing the Education page. The Education page displays where a faculty member graduated, her/his major, degree obtained, and whether that degree is a terminal degree.

Follow the steps below to access and search for Education data.

**Step 1**  
**Navigate to Education:** Select *Workforce Development > Faculty Events > Track Events > Education*:

**Step 2**  
**Enter Search Criteria:** Enter search criteria in any of the fields. Select to execute your search.
### Step 3

**Review Search Results:** Education information regarding the employee will display. Each page is pictured and described in the following sections.

<table>
<thead>
<tr>
<th>School Education</th>
<th>Professional Ed. and Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item/Faculty</td>
<td>ID: 999999999</td>
</tr>
<tr>
<td>School Education</td>
<td>Find</td>
</tr>
<tr>
<td>Country</td>
<td>USA</td>
</tr>
<tr>
<td>School Type</td>
<td>Unknown</td>
</tr>
<tr>
<td>Date Acquired</td>
<td>13</td>
</tr>
<tr>
<td>Average Grade</td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>School Code</td>
<td>School Name</td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
</tbody>
</table>

### Area of Study

<table>
<thead>
<tr>
<th>Area of Study</th>
<th>Find</th>
<th>View all</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
a. School Education - This page is not used.

Notes:
b. Professional Ed and Training

Click to open to the Professional Education and Training page. This page displays education for the faculty member.

Notes:
6. Create Tenure Data

This page displays tenure information and academic discipline for academic employees.

Follow the steps below to access and search for Create Tenure Data.

**Step 1** Navigate to Create Tenure Data: Select Workforce Development > Faculty Events > Calculate Tenure > Create Tenure Data:

**Step 2** Enter Search Criteria: Enter search criteria in any of the fields. Select to execute your search.
Step 3

**Review Search Results:** Tenure information regarding the faculty member will display.

### Tenure Data
- **Name:** [Name]
- **ID:** 99999999
- **Tenure Status:** Non Tenure On Track
- **Home Rank:** 802 Assistant Professor
- **Track Start Date:** 09/01/2002
- **Change Date:** 09/01/2002
- **Original Track Date:** 09/01/2002
- **Tenure Home:** CTENOM
- **Economics** Grant Tenure: N
- **Service Calc. Group:** Mandatory Review Date: 09/01/2009
- **Granted Date:**
- **Total Required:** 0.000000
- **Extended By:** 0.000000
- **Time Accumulated:** 0.000000
- **Committee FTE:**
- **Notes:**

### Academic Discipline

<table>
<thead>
<tr>
<th>Department</th>
<th>Description</th>
<th>Grant</th>
<th>Rank</th>
<th>Bank</th>
<th>Bank Description</th>
<th>Tenure Status</th>
<th>Effective Date</th>
<th>EIE</th>
</tr>
</thead>
<tbody>
<tr>
<td>04563918</td>
<td>Art History and Archaeology</td>
<td>Y</td>
<td>N</td>
<td>Bank</td>
<td>Description</td>
<td>Tenure Status</td>
<td>Effective Date</td>
<td>EIE</td>
</tr>
</tbody>
</table>

### Notes:

- [Image of a book]
7. Faculty Rank and Status History

This page provides a summary of information on the employee’s academic rank and status history at the University.

Follow the steps below to access and search for Faculty Rank and Status History.

**Step 1**

**Navigate to Review Rank/Status History:** Select *Workforce Development > Faculty Events > Calculate Tenure > Review Rank/Status History*:

**Step 2**

**Enter Search Criteria:** Enter search criteria in any of the fields. Select *Search* to execute your search.
### Step 3

**Review Search Results:** Rank information regarding the faculty member will display.

<table>
<thead>
<tr>
<th>Employee:</th>
<th>Richard Hardy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenure Home:</td>
<td>CPO/LISCI</td>
</tr>
<tr>
<td>Tenure Status:</td>
<td>TEN</td>
</tr>
<tr>
<td>Track Start Dt:</td>
<td>08/15/1978</td>
</tr>
<tr>
<td>Override Calc:</td>
<td>N</td>
</tr>
<tr>
<td>Tenure Granted Date:</td>
<td></td>
</tr>
</tbody>
</table>

#### Change History

<table>
<thead>
<tr>
<th>Eff Date</th>
<th>Academic Rank</th>
<th>Tenure Status</th>
<th>Action Date</th>
<th>Change Reason</th>
</tr>
</thead>
</table>

#### Notes:

![Notes icon]
8. Leave Accruals

Information on the different leave plans (vacation, sick leave, personal days) for an employee can be located on this page.

**Step 1**
*Navigate to Review Accrual Balances:* Select Benefits > Manage Leave Accruals > Review Accrual Balances:

**Step 2**
*Enter Search Criteria:* Enter search criteria in any of the fields. Select to execute your search.
Step 3

**Review Search Results:** Leave accrual regarding the employee will display with several pages. Each type of leave will be grouped together. Use **Find** to locate different types of leave. For example, to find Personal Leave entries, click Find and enter "Personal." This will open the most recent Personal Leave record. To view each leave record page by page use the navigation bar.

![PeopleSoft Interface](image)

**Notes:**
9. Create Additional Pay

This page displays information on earnings paid to an employee in addition to regular, base pay. You can tell what type of additional pay it is by the information in the Earnings Code.

**Step 1**

**Navigate to Create Additional Pay:** Select *Payroll for North America > Employee Pay Data USA > Create Additional Pay*.

**Notes:**
Step 2

Enter Search Criteria: Enter search criteria in any of the fields. Select to execute your search.

Create Additional Pay
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

- **EmpID:**
- **Emp ID No.:**
- **Name:**
- **Last Name:** begins with PARKER
- **Second Name:**
- **Alternate Character Name:**

- Include History

[Search] [Clear] [Back Search] [Save Search Criteria]

Notes:
Step 3

**Review Search Results:** This page displays information regarding the employee and his/her additional earnings. More detail can be viewed by clicking the carats to expand the Job Information and Tax Information blocks.

---

**Notes:**
10. Review Paycheck

**Step 1** Navigate to Review Paycheck: Select Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck.

**Step 2** Enter Search Criteria: Enter search criteria in any of the fields. Select Search to execute your search.
Step 3

**Review Search Results:** This page displays information regarding the employee and his/her job. More detail can be viewed by clicking the carats to expand the Job Information and Tax Information blocks.

**NOTE:** Because we don’t actually run the payroll process in the training database you will not be able to view Paycheck Data during training. In the production database, however, information regarding what the employee has been paid will display.
C. PEOPLESOFT HR/PAYROLL TERMS

Action/Reason
The personnel action being taken and the reason for the action being taken. Action/reasons appear on the Job Data PeopleSoft pages as a code. For example, HIR/NP is an action/reason for Hire/Never Previously Worked.

Additional Pay
Earnings paid to an employee in addition to regular or base pay. This information appears on the Additional Pay PeopleSoft pages. For example, shift differential, extra compensation as a one-time payment, moving expenses, etc.

Administrative Posts
If an employee has an active, paid appointment, information regarding any subsequent unpaid appointment(s) is captured on the PeopleSoft Administrative Posts page. This designation is most commonly associated with academic staff; however, administrative staff may also have additional titles with no compensation.

*Benefit Program
The University benefit program an employee is eligible to receive. It appears as a 3-character code on the Benefit Program Participation PeopleSoft page. For example, NSB – Non-exempt Staff Biweekly.

*Benefit Status
Identifies the benefit eligibility of an employee. It appears on the Job Information PeopleSoft page as one of the following:

Regular – an Administrative, Service and Support staff member expected to work at least 75 percent FTE (full-time equivalency) with an indicated appointment duration of at least nine months and regularly scheduled to work a minimum average of 30 hours per week. Service credit under the UM retirement program requires a minimum of 1500 hours worked per year (Benefit eligible).

OR

Temporary – (non-regular) an appointment that does not qualify for regular status as defined above (Non-benefit eligible).

*Business Unit
Identifies the employee’s home campus/business unit. It appears as a 5-character code on the Work Location PeopleSoft page. For example, COLUM is the code for Columbia Campus.
**Concurrent Job**
If an employee has an active, paid appointment, any subsequent paid appointment(s) is considered a concurrent job(s). Concurrent jobs are generally in a different department. A concurrent job appears in PeopleSoft as an additional Empl Record. (For example, 01024881-0; 01024881-1)

**Courtesy Appointment**
An appointment where there is no compensation provided by the University. Used as a mechanism to provide access to certain university benefits (i.e., ID card, library, computer) and to track associations with the University. People in courtesy appointments are in Pay Group NEN (Non-Employee Not Paid). The Pay Group can be viewed on the Payroll page.

**Earn Code**
A code that identifies the type of pay. This information appears on the Job Earnings Distribution PeopleSoft page. For example, REX is the earnings code for regular, exempt pay.

**EmplID**
An identification number that is randomly generated by PeopleSoft and assigned to employees. It is used as a unique identifier for each employee. It appears as an 8-digit number on PeopleSoft pages. For example, 01024153.

**Empl Rcd#**
Identifies the employee record in PeopleSoft. An employee generally has an empl rcd# of 0 for the first position, and an empl rcd# of 1, 2, etc., for each successive appointment. Student appointments start with empl rcd# 1.

**Employee Status**

**FTE**
Full-time equivalency. It appears on the Job Information PeopleSoft page as one of the following:

- **Full-time** - the position has an FTE of 1.00 and standard hours are 40 OR
- **Part-time** - the position has an FTE less than 1.00 and standard hours are less than 40

**Department**
Identifies the specific department or sub-department that has fiscal, programmatic and administrative responsibility for the employee. It appears as a unique alpha code on the
Work Location PeopleSoft page. For example, CHUMNRESSV is the code for Human Resource Services on the Columbia campus.

**JED – Job Earnings Distribution**
Information on the source(s) of funding, the percentage or amount from each source, and the effective date for each source of funding for pay. This information appears on the Job Earnings Distribution PeopleSoft page.

*Job Code*
A code that is assigned to a specific job title. This information appears as a 4-digit code on the Job Information PeopleSoft page. For example, 9330.

**PAF - Personnel Action Form and Turn-Around PAF**
Information regarding personnel actions (e.g., new hires, re-hires, promotions, transfers, etc.) is completed on the PAF by departments. The department sends the PAF to HR to be reviewed and approved. After review and approval, it is entered into the PeopleSoft system by Payroll.

*Pay Group*
The structure of compensation and pay cycle. This information appears on the Job Information PeopleSoft page. Pay group includes:

- B17 - NRA Biweekly 17
- B18 - NRA Biweekly 18
- BIW - Biweekly
- ELO - Enterprise-Like Operations (HOSPT)
- M17 - NRA Monthly 17
- M18 - NRA Monthly 18
- MON - Monthly
- NEA - Non Resident Alien non-employee paid
- NEN - Non-Employee Not Paid

*These items can also be found in Employee Lookup in WebTime.

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GLOSSARY

Application – A program or group of programs designed for end users.

Authenticate – The process of identifying an individual, usually based on a username and password. Authentication merely ensures that the individual is who he or she claims to be, but says nothing about the access rights of the individual.

Browser – Short for Web browser, a software application used to locate and display Web pages. The two most popular browsers are Netscape Navigator and Microsoft Internet explorer.

Browser session – The period of time a user interfaces with an application (when using a web browser).

Cache – A small fast memory holding recently accessed data, designed to speed up subsequent access to the same data.

Data – Distinct pieces of information, usually formatted in a special way. All software is divided into two general categories: data and programs. Programs are collections of instructions for manipulating data.

Database – A collection of information organized in such a way that a computer program can quickly select desired pieces of data. You can think of a database as an electronic filing system.

Favorite – A favorite is a feature found in Microsoft Internet explorer that allows a user to save the locations to their favorite Internet locations. Similar to Netscape’s bookmarks.

Grid – Grids allow you to view multiple data records for a single transaction on the same page.

Home page – A home page is the main page of a Web site. Typically, the home page provides an index, menu, or other way to see and access the site content.

Hot key – A defined key sequence that executes a command.

Hyperlink – An element in an electronic document that links to another place in the same document or to an entirely different document. Typically, you click on the hyperlink to follow the link.

Interface – A boundary across which two independent systems meet and act on or communicate with each other.
Internet – A global network connecting millions of computers. More than 100 countries are linked into exchanges of data, news and opinions.

Internet Architecture – (architecture) The term architecture can refer to either hardware or software, or to a combination of hardware and software. The architecture of a system always defines its broad outlines, and may define precise mechanisms as well.

Internet Explorer – Also referred to as IE, this is Microsoft's free World-Wide Web browser.

Menu – A list of commands or options from which you can choose. Most applications now have a menu-driven component. You can choose an item from the menu by highlighting it and then pressing the Enter or Return key, or by simply pointing to the item with a mouse and clicking one of the mouse buttons.

Navigate – To access different pages on a web site.


Password – A secret series of characters that enables a user to access a file, computer, or program.

Production database – The database where real or “live” work data is stored.

Program – A program is like a recipe. It is an organized list of instructions that, when executed, causes the computer to behave in a predetermined manner. Without programs, computers are useless.

Record – In database management systems, a complete set of information. Records are composed of fields, each of which contains one item of information. A set of records constitutes a file. For example, a personnel file might contain records that have three fields: a name field, an address field, and a phone number field.

Secure page – When accessing a web site, a secure page is a page with security provisions which ensure that only authorized users may access it. Secure sites usually require logging in with a user ID and password, have a URL that starts with “https”, and display a lock 🛡️ at the bottom of the screen.

Security – In the computer industry, refers to techniques for ensuring that data stored in a computer cannot be read or compromised by any individuals without authorization.

Sign in page – The sign in page is where a user logs into a secure site. It provides fields for entering the user ID and password.
**Software** – Computer instructions or *data*. Anything that can be stored electronically is software. The storage devices and display devices are hardware.

**Subfolder** – A folder within another folder.

**Submenu** – Used to describe a menu that is contained within another menu.

**Table** – A collection of records in a relational database.

**Training sandbox** – The training sandbox is a database in which you can practice what you learn in training. This database is not tied to production data and is refreshed nightly so you can “play” in the sandbox and make mistakes without impacting real data.

**URL** – Abbreviation of Uniform Resource Locator, the global address of documents and other resources on the World Wide Web.

**User** – An individual who uses a computer. This includes expert programmers as well as novices. An end user is any individual who runs an application program.

**User guide** – A user guide is an instruction manual that serves as a learning tool and reference resource for users of a software application.

**User ID** – For our purposes, your user ID is the same as your Exchange ID, SSO ID, or NT ID.

**Username** – A name used to gain access to a computer system.

**Web browser** – a software application used to locate and display Web pages. The two most popular browsers are Netscape Navigator and Microsoft Internet explorer.

**Web page** – A web page is a document on the World Wide Web. Every Web page is identified by a unique URL (Uniform Resource Locator).

**Web site** – A site (location) on the World Wide Web. Each Web site contains a home page, which is the first document users see when they enter the site. The site might also contain additional documents and files. Each site is owned and managed by an individual, company or organization.

**World Wide Web** – A system of Internet servers that support specially formatted documents. The documents are formatted in a markup language called HTML (HyperText Markup Language) that supports links to other documents, as well as graphics, audio, and video files. This means you can jump from one document to another simply by clicking on hot spots. Not all Internet servers are part of the World Wide Web.
Congratulations!

You have completed the PeopleSoft 8.9 Navigation Basics module.