PeopleSoft

Introduction to PeopleSoft

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san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES℠

PREPARED BY SDCOE PEOPLESOFT SUPPORT

For additional information about this publication please contact PeopleSoft Services and Solutions Team at 858-298-2203 or submit a Service Portal ticket.

Contents

Customer Service image on p.2 designed by CK from thenounproject.com.
Pointer image on p.5 designed by Evan MacDonald from thenounproject.com.

Part I: Overview

About This Guide

Welcome to PeopleSoft! Just getting started?

This guide will show you the basics. We've provided some useful rules of thumb and new terminology on the next pages. Use the remainder of the guide to assist you with logging in to your PeopleSoft Portal, navigating, searching, and running reports. You'll be up and running in no time!

Do you know your Employee ID? You will use your 6-digit Employee ID to log into PeopleSoft. Reach out to your Manager or Human Resource Department to get your Employee ID Number.

What is PeopleSoft?

Overview

In January 2011, the San Diego County Office of Education formed a team to modernize the areas of **business operations**, **finance**, **payroll**, and **human resources** for your school district, as well as the county office.

- Oracle PeopleSoft is the software solution.
- PeopleSoft applications include Financials, Human Capital Management (HCM), Employee Self-Service (ESS) and Planning and Budgeting Cloud Solution. Your district might use some or all of these applications.
- Finance and HCM user will log in through the PeopleSoft Portal at https://peoplesoft.erp.sdcoe.net.
- There is a separate URL for the Employee Self-Service (ESS) site, used to view paychecks and update personal information. To access ESS, go to https://ess.erp.sdcoe.net.

  NOTE: Some districts also use the ESS for entering absences, viewing benefits information, and other "self-service" functions.

Finance and HCM Applications

NOTE: Your district may or may not be using all these components.

Finance	HCM	ESS	Planning and Budgeting Cloud Service
▪ Accounts Payable ▪ Accounts Receivable ▪ Accounts Receivable – Billing ▪ Budget Monitoring (Commitment Control or KK) ▪ Financial Asset Management ▪ General Ledger ▪ Inventory ▪ Project Costing ▪ Purchasing ▪ Travel & Expenses	▪ Absence Management ▪ Benefits Administration ▪ Department Budget Table (DBT) ▪ Human Resources ▪ Payroll ▪ Personnel Action Forms (PAF) ▪ Recruiting ▪ Time & Labor	Employee Self-Service (ESS) is for *all staff* for: ▪ Changing password ▪ Viewing paychecks ▪ Updating personal information ▪ Entering direct deposit information ▪ Updating tax withholding forms Your organization may opt to enable other features: ▪ COVID vaccinations tracking and testing ▪ Enter absence requests ▪ View benefits	▪ Budget planning system that started in the 2021-22 fiscal year. **Hyperion** ▪ Hyperion was used for prior budgeting years and was retired in December 2020

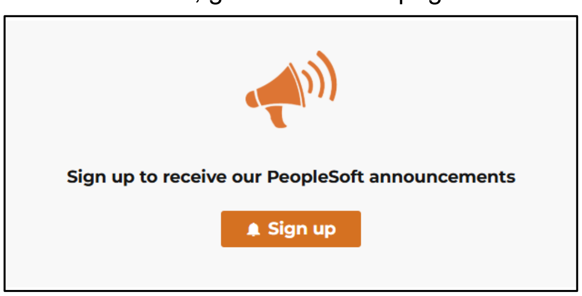
PeopleSoft Support Team

SDCOE's PeopleSoft (PS) Support Team conduct training on the PeopleSoft application and provide Help Desk support. We also create guides and job aids as well as offer webinars and user group meetings. We work closely with your organization's PeopleSoft contacts to resolve issues and determine training needs.

If you have any question, please contact the PeopleSoft Support Team by submitting a Service Portal ticket or calling 858-298-2203.

We encourage you to visit the PeopleSoft Support website at: www.sdcoe.net/peoplesoft-support for guides, job aids, demos, tutorials, and announcements and calendar.

- **Resources:** Use the links to ESS, HCM, Finance and PBCS to access specific guides, job aids, checklists, flowcharts, demos, tutorials, and other information to help you use PeopleSoft.

- **Links:** Can't remember how to get to PeopleSoft? This page provides links to where you need to go:
  - **PeopleSoft Portal and ESS**
  - **Other Environments**: Sandbox where you can practice your new skills
  - **Remote access environments**:
    - Production (SDPP) can only be accessed from your district's work sites. or with a Secure Authorization account provided by the PS Support Team.
    - Sandbox (SDPX) and Testing Sandbox (SDPT) are only available from your district's work sites.
  - **System Status page**: See if system is down and when maintenance will occur
  - **Calendar and Training**:
    - View dates and times for upcoming trainings. Be sure to register.
    - Note when extended maintenance will be occurring on the weekend.
    - Sandbox refreshes are done every 2 weeks. This is an environment where you have practice using PeopleSoft.
  - **Announcements –** See the most recent announcements. To sign up to receive our PeopleSoft Announcements, go the to Home page and look for this box.
  - 

Rules of Thumb

Here are a few items about PeopleSoft to point out, right up front.

PeopleSoft is web-based. Access is from work only.

You can use Chrome, Firefox, Edge, and Safari.

Remote access is only available to select districts users. Contact your district support person for questions regarding remote access.

To access PeopleSoft applications, you need to be set up as a user with roles.

Your level of access to the Finance and HCM applications is based on the types of things you need to see and do in PeopleSoft. This is determined by your district. Every user is set up with the same basic access to the Portal.

Periodically clear your cache.

When you use PeopleSoft, you should periodically clear your browser cache to allow your browser to function more efficiently. Directions are on p.57.

Be aware of the 90-minute timeout.

If you don't use PeopleSoft for 90 minutes, the screen will timeout. Please be aware that if you have multiple windows open, including the Portal, and you don't touch one of those screens within 90 minutes, all open PeopleSoft windows will time out.

Don't share your password.

Log into PeopleSoft with only your ID and password, and never share this information with anyone else.

Home Page

The Home Page is the first screen you see when logging into PeopleSoft. https://peoplesoft.erp.sdcoe.net. It could be Employee Self Service or Manager Self Service.

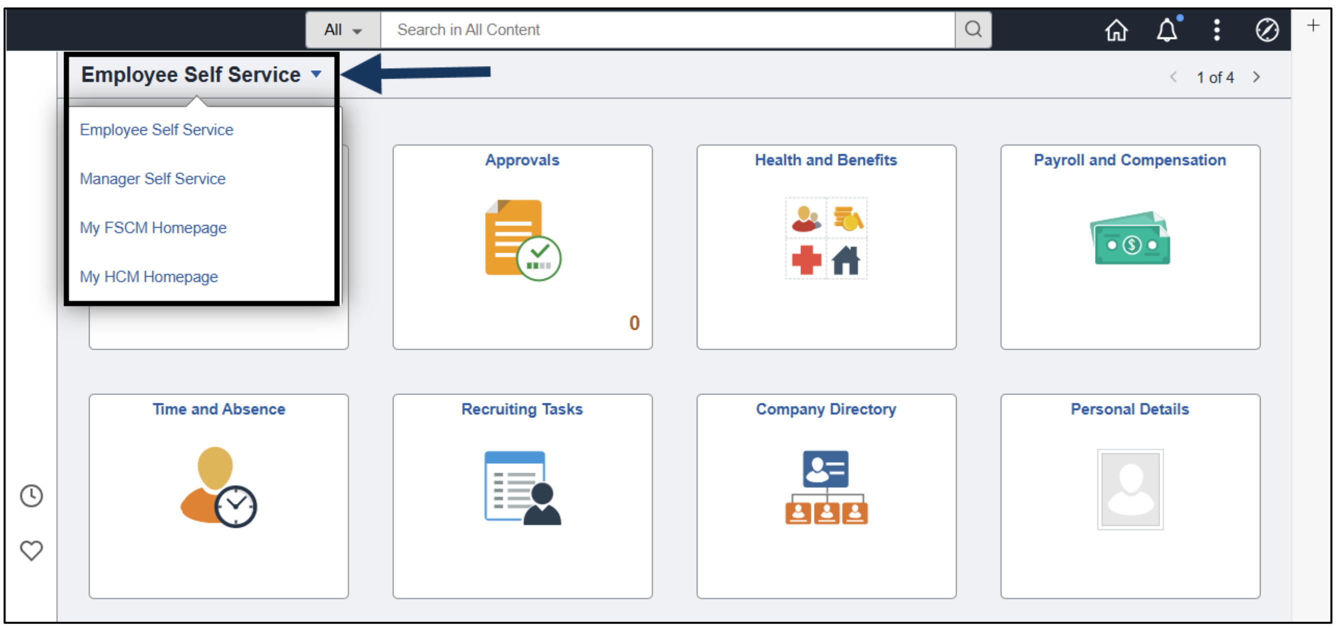
Homepage Selections

Use the left dropdown to get to the homepage you need. Has tiles with access to specific modules.

- Employee Self Service*
- Manager Self Service
- My FSCM Homepage
- My HCM Homepage

The tiles you see for Manager Self Service, My HMC Homepage and My FSCM Homepage will be based on your roles and permissions.

* For details on **Employee Self Service**, please refer to the ESS guide or Quick Steps for ESS job aid found on the PeopleSoft Support Website under https://www.sdcoe.net/peoplesoft-support/resources/ess-training-materials

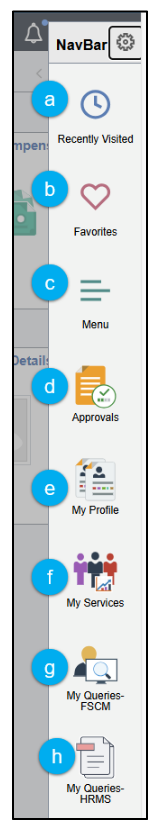


Toolbar overview

A. **Dropdown menu**: To navigate to different homepages
B. Home icon: Will take you back to Employee Self-Service where you started after log in.
C. Global Search: Allows you to search for the pages you are looking for
D. Bell: List of notifications
E. 3 dots: Action list has several options

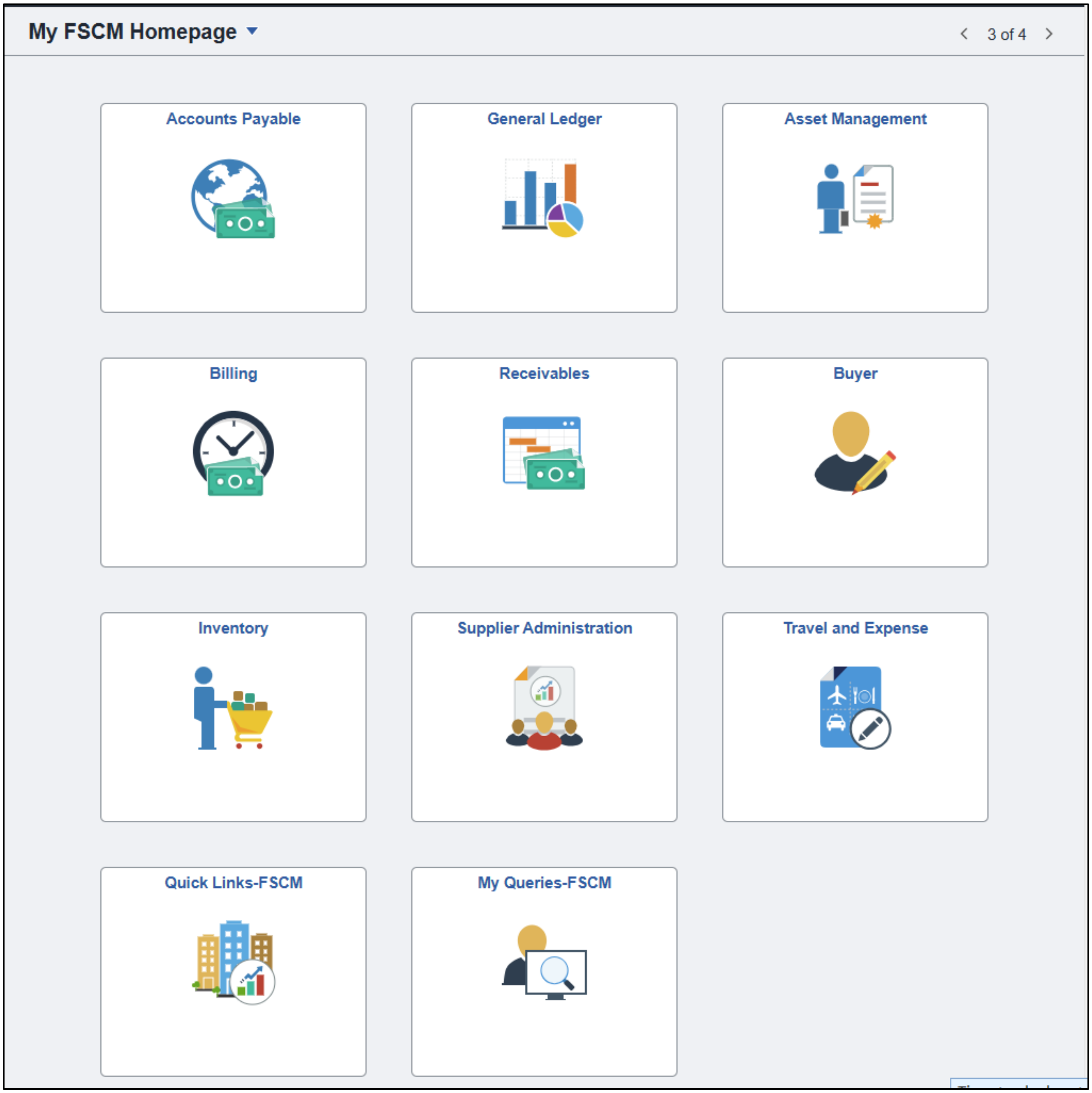
- **Personalize Homepage:** Currently not available
- **Refresh:** Refreshes the page
- **New Window:** Opens your current session in a new tab (window)
- **My Preferences:** Currently not available
- **Help**: Takes you to Oracle PeopleSoft documentation
- **Sign Out**: Before closing your browser when done, be sure to log out of your PeopleSoft session

F. **Compass icon**: Opens the NavBar to:
  a. **Recently Viewed:** Lists last 10 pages you were working in.
  b. **My Favorites:** You can save any page as a Favorite. Favorites can be edited see page 24
  c. **Menu:** Here you can step through each area to get to the page you want to work on
  d. **Approvals:** See items that need your approval if you are set up as an approver
  e. **My Profile:** You can reset password, update email address, set up security questions, set alternate approver.
  f. **My Services:** Links to additional helpful pages outside of PeopleSoft
  g. **My Queries HRMS:** Takes you to Query Viewer
  h. **My Queries FSCM:** Takes you to Query Viewer.



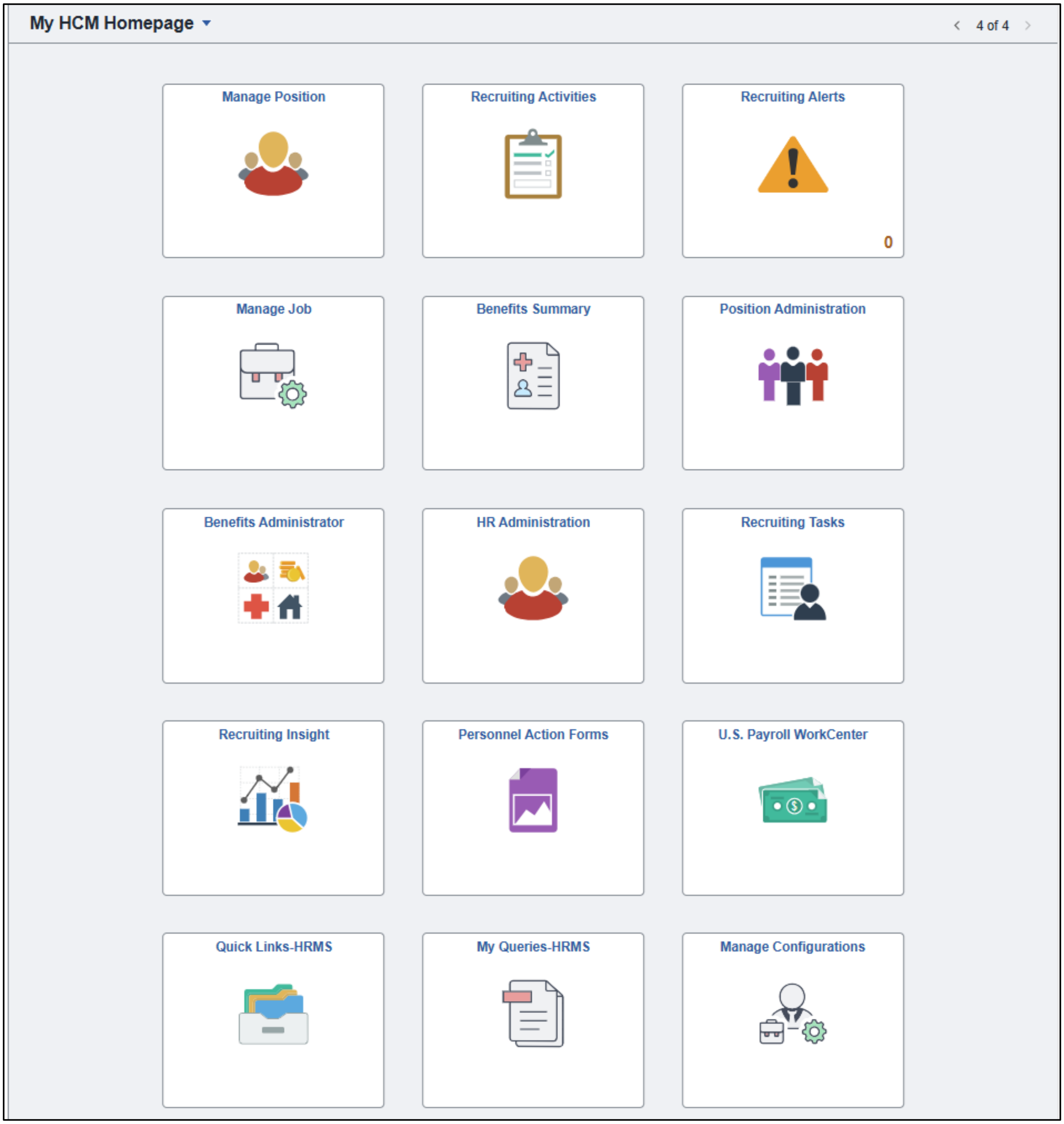
My FSCM Homepage

Tiles shown will vary based on your permissions.



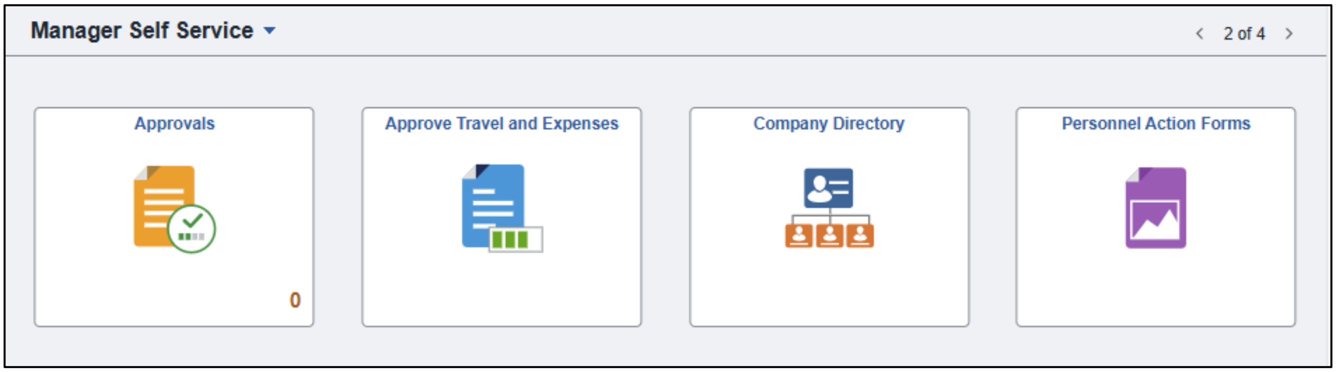
My HCM Homepage

Tiles shown will vary based on your permissions.



Manager Self Service

Tiles shown will vary based on your permissions.



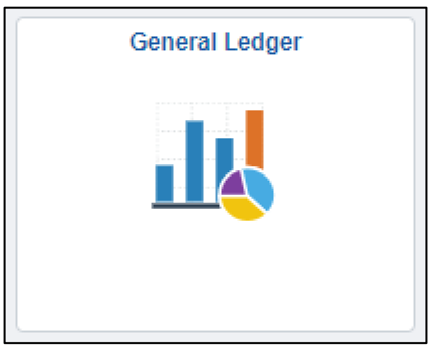
Navigation Options.

From the homepage, there are several navigation options to get to the page you are looking for:

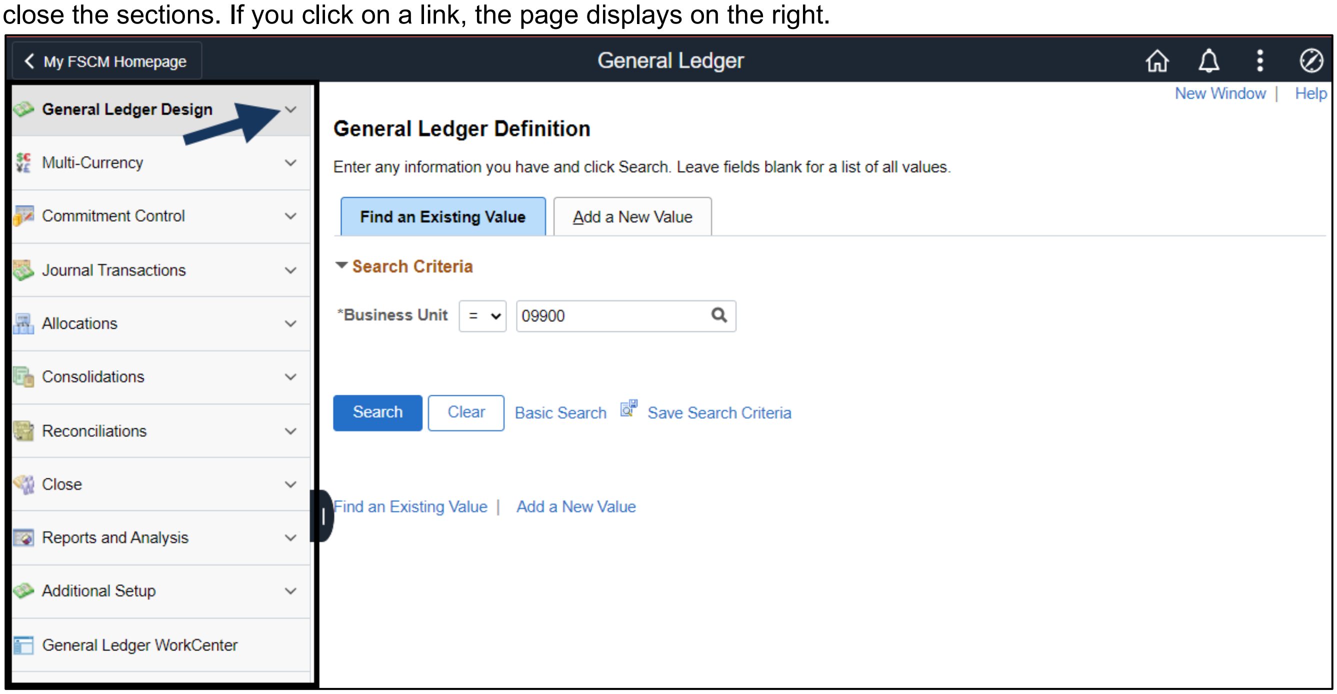
- Tile > Navigation Collection
- Quick Links Tile> Quick Links
- NavBar > Menu
- NavBar > Favorites
- Nav Bar > Recent Places

Tile > Navigation Collection (FSCM)

1. **Click on the tile** for the area you will be working in. Remember the tiles you see will be based on your roles and permissions. **Example:** General Ledger



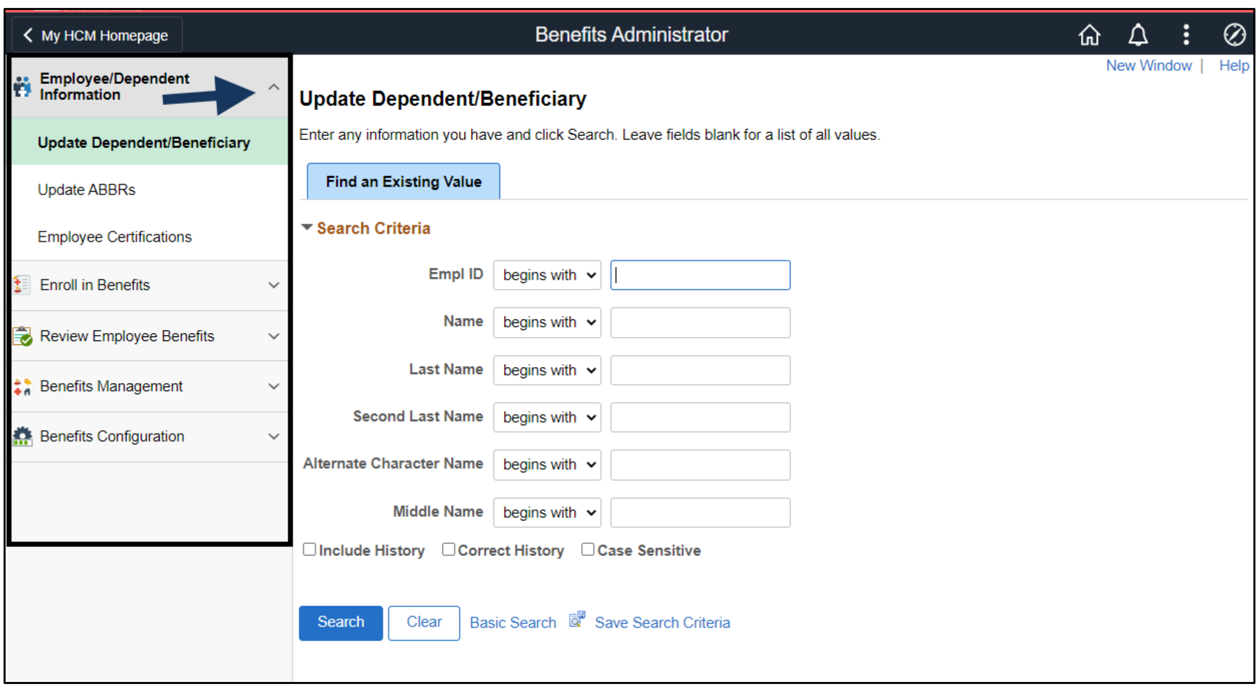
2. **Navigation Collection opens** with different areas you can work in. Use a dropdown arrow to open and close the sections. If you click on a link, the page displays on the right.



Tile > Navigation Collection (HCM)

1. **Click on the tile** for the area you will be working in. Remember the tiles you see will be based on your roles and permissions. **Example:** General Ledger

2. **Navigation Collection opens** with different areas you can work in. Use a dropdown arrow to open and close the sections. If you click on a link, the page displays on the right.

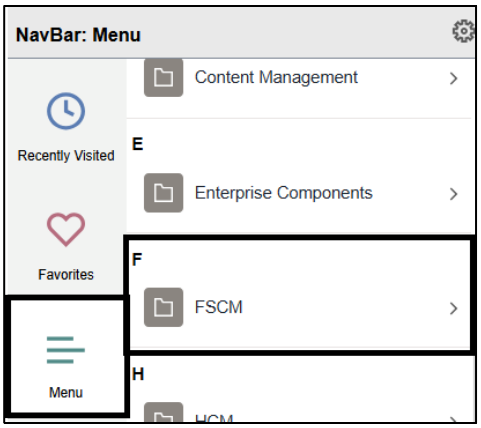


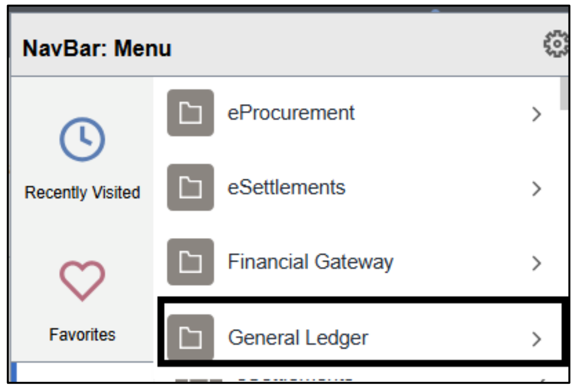
NavBar > Menu

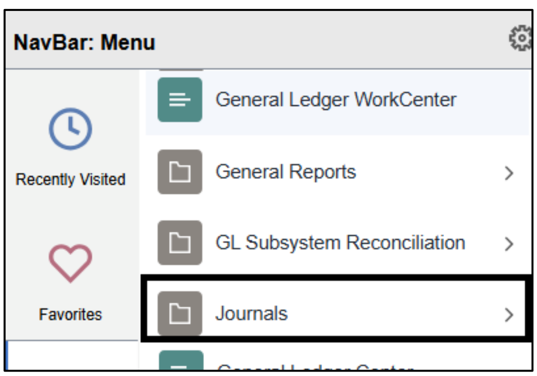
All pages in PeopleSoft can be accessed by using NavBar > Menu The navigation you need is available in the guides and job aid. Here is an example of 2 different navigations.

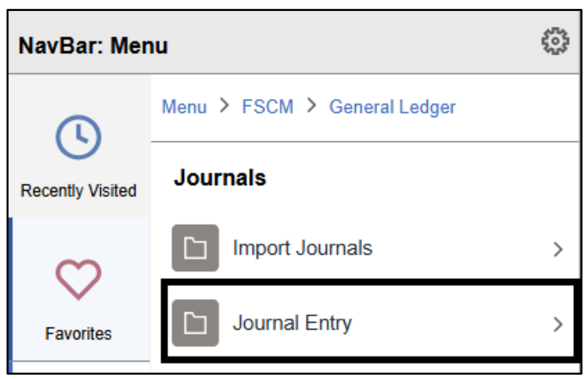
Finance

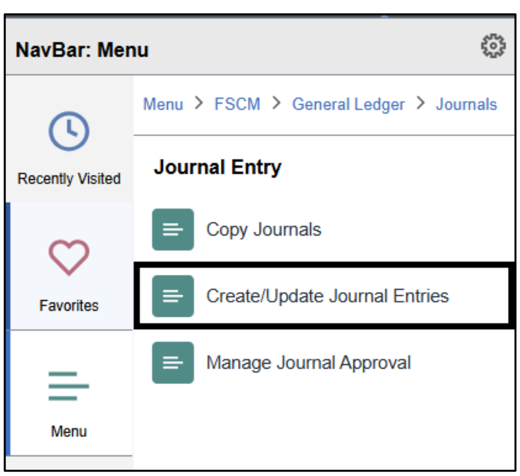
Here is navigation for **Create/Update Journal Entries screen**: NavBar > Menu > FSCM > General Ledger > Journals > Journal Entry > Create/Update Journal Entries







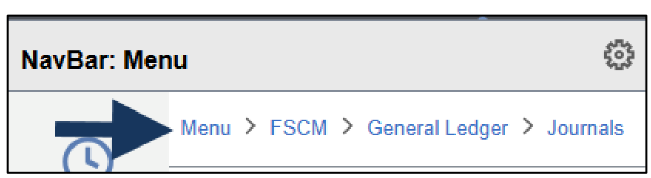




NOTE:

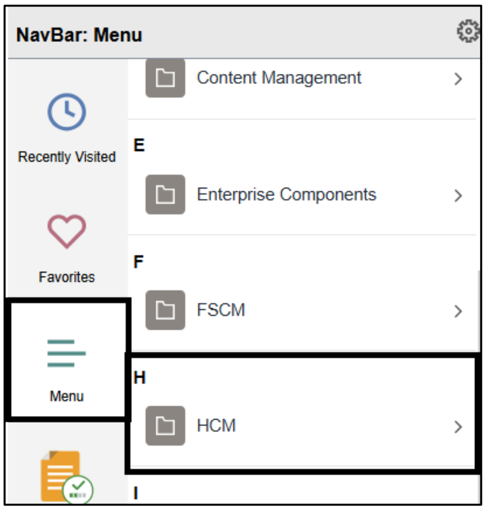
The items that you see in the Menu are based on your roles (permissions).

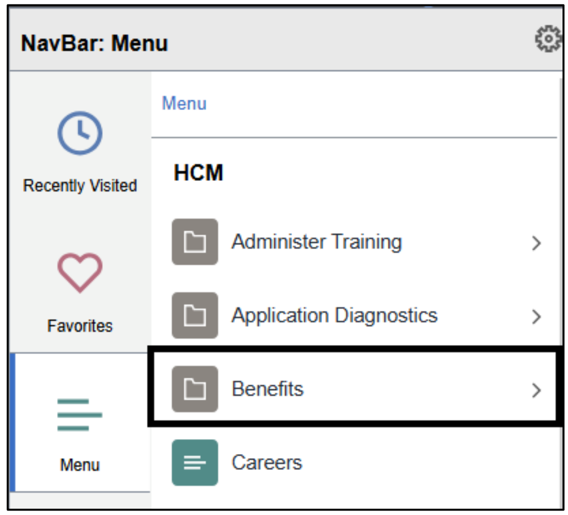
You can go back steps by clicking the item in the breadcrumbs at the top of the Menu page

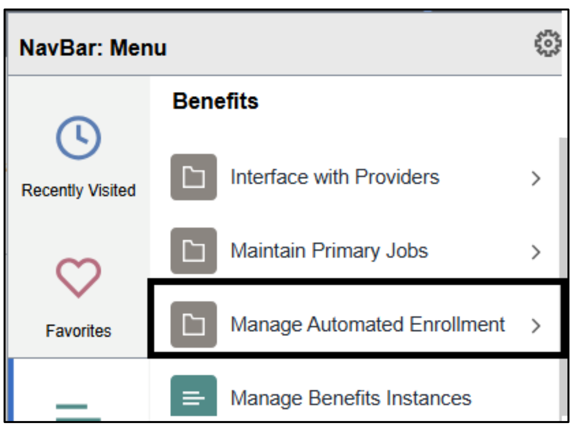


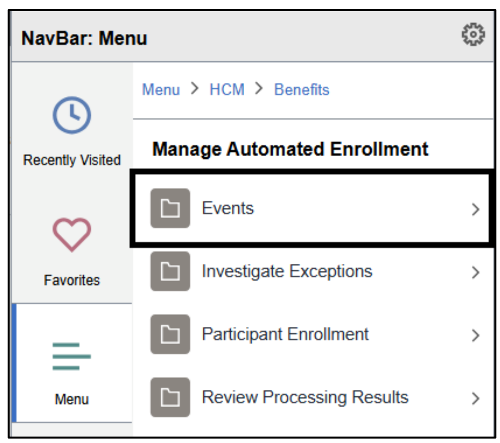
HCM

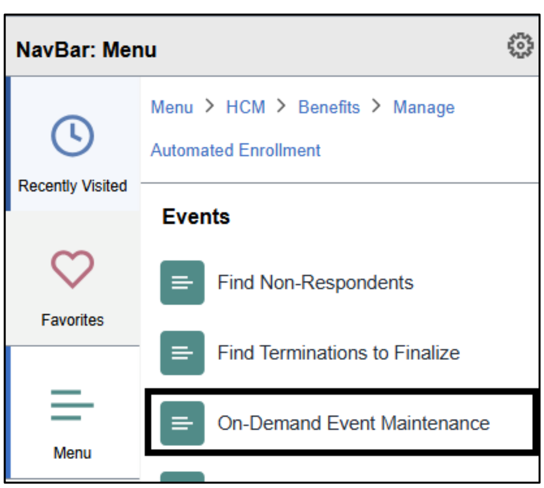
Here is navigation for **On-Demand Event Maintenance screen:** NavBar > Menu > HCM > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance











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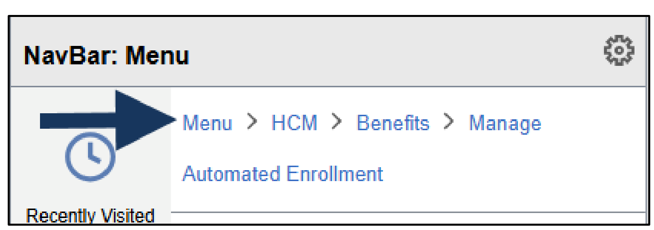
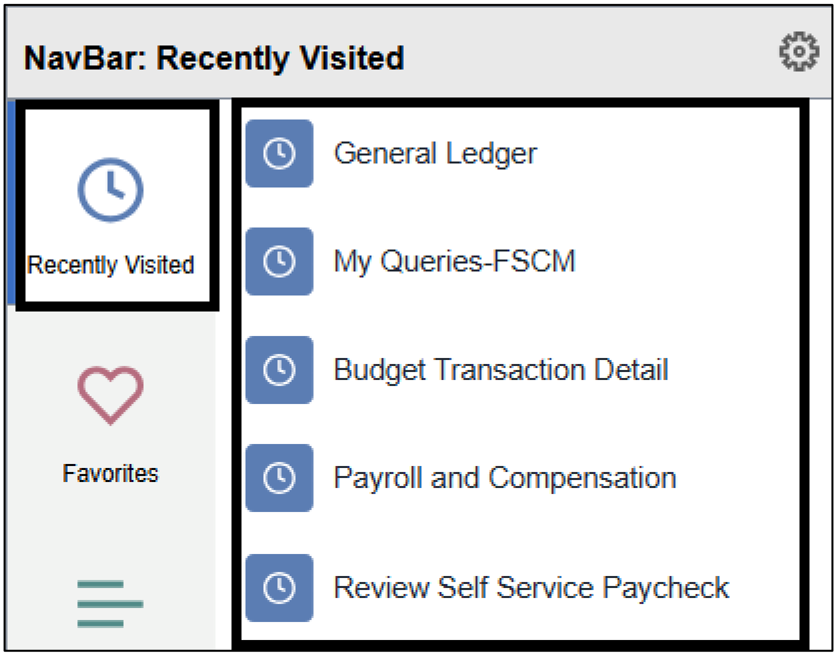


Nav Bar > Recently Visited

Use the NavBar > Recently Visited to find those pages you have recently completed transaction on.



Part II: PeopleSoft Access

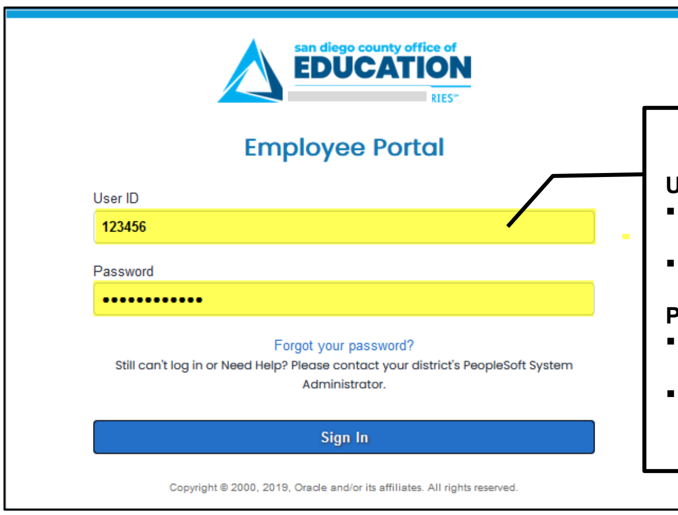
Logging In to the PeopleSoft Portal

Log into the PeopleSoft Portal to access the Finance and HCM applications. Access is only from district worksite or the SDCOE network (no public access). Remote access requires special set up. Refer to your district PeopleSoft contact so they can submit a ServiceNow Ticket.

Note: If at any time your log in is not working, try clearing cache and restarting your browser (see page 57).

Directions:

1. Go to the **PeopleSoft Portal** at https://peoplesoft.erp.sdcoe.net. This is the site that you will want to bookmark. You can use Chrome, Firefox, Internet Explorer, Edge, and Safari.
2. Log in with your PeopleSoft User ID and password. If you are a new user, you will be forced to change your auto-generated password the first time you log in (see p.18).



USER ID:
- User ID = Your employee ID without hyphens.
- *Example: 123456*

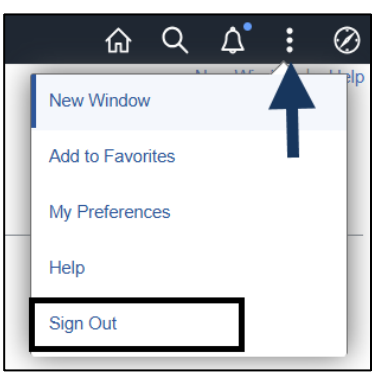
PASSWORD:
- *You will be given a TEMPORARY password by your district's IT department.*
- *You will be prompted to reset the password.*

NOTE: If you have already used PeopleSoft Finance or HCM, continue to use your existing password.

Logging Out

Always sign out when you are done rather than closing the browser or window.

From any page, click on the **3 dots** at the top-right of the screen then click **Sign out**.



Changing Your Password

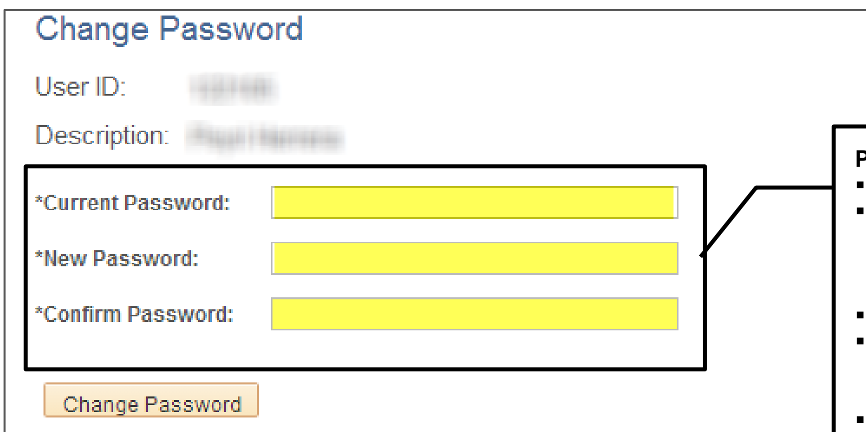
This section covers:

- Password at First Login
- Setting Up "I Forgot My Password" – **VERY IMPORTANT!**
- Changing Your Password
- Resetting a Forgotten or Expired Password

First Login

On your first login, you will be prompted to change your auto generated password. You will need to change your password every 365 days.

Directions: When prompted, enter your current password. Then type a new password twice following the password requirements. Click **Change Password**. Remember, your password is case sensitive.



PASSWORD REQUIREMENTS:

- Minimum of ten characters
- Must contain the following: an uppercase letter, lowercase letter, numeral, and a special character (%,!,&)
- Cannot contain the User ID.
- Must be changed every 365 days. When changed, it may not match the previous password.
- Passwords cannot be reused.

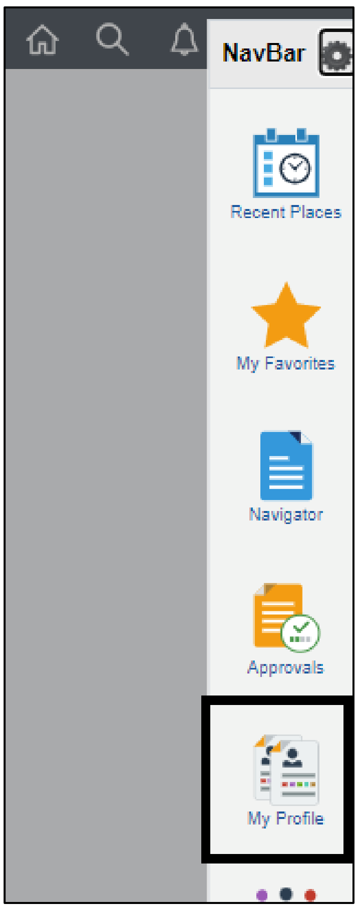
Upon changing your password, please enroll in "I Forgot My Password" (p.19) so you can easily reset a forgotten or expired password.

Note: If at any time your log in is not working, try clearing cache and restarting your browser (see page 57).

Setting Up "Forgot Your Password" – VERY IMPORTANT!

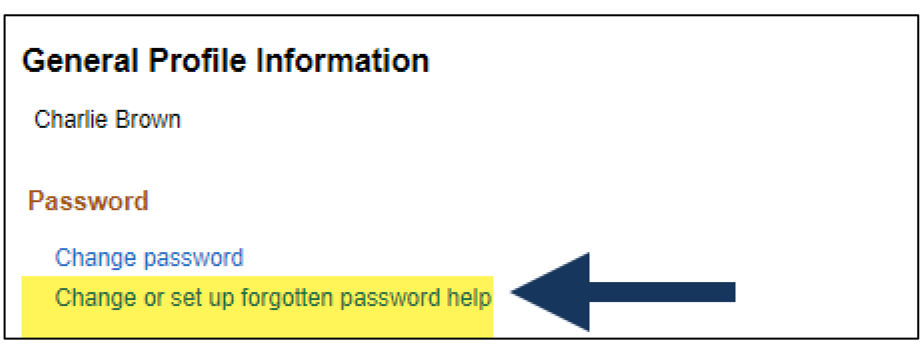
Select a security question and verify your email address. It is very important that you set this up! It will save you time in the future in the case you forget your password or if it expires.

1. Go to **PeopleSoft Portal** https://peoplesoft.erp.sdcoe.net (This can also be done in ESS).
2. Go to: **NavBar**.
3. Click **My Profile** icon. The General Profile Information page will appear. Be sure to complete the next steps (Parts 1 & 2).

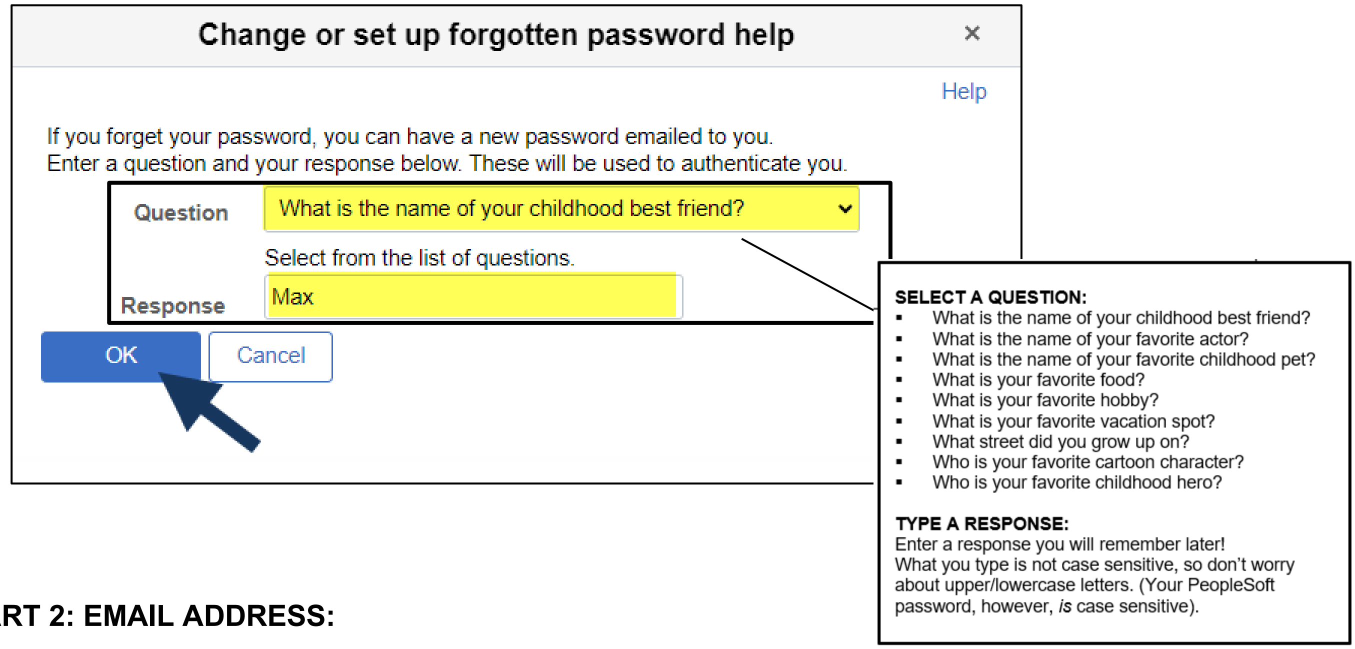


PART 1: SECURITY QUESTION:

1. Click the link that says **Change or set up forgotten password help**.

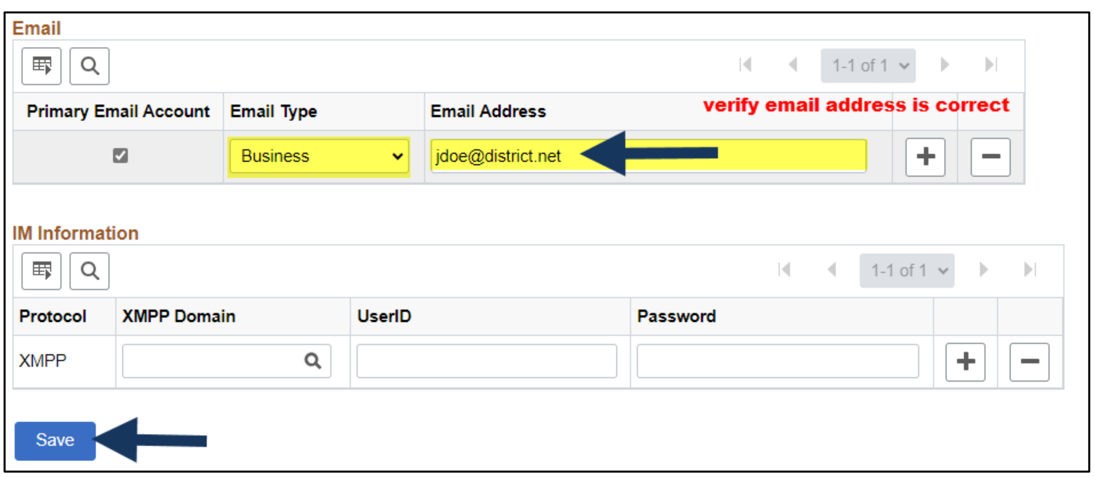


2. Select a security question and enter a response, then click **OK**. Your response is *not* case sensitive.



PART 2: EMAIL ADDRESS:

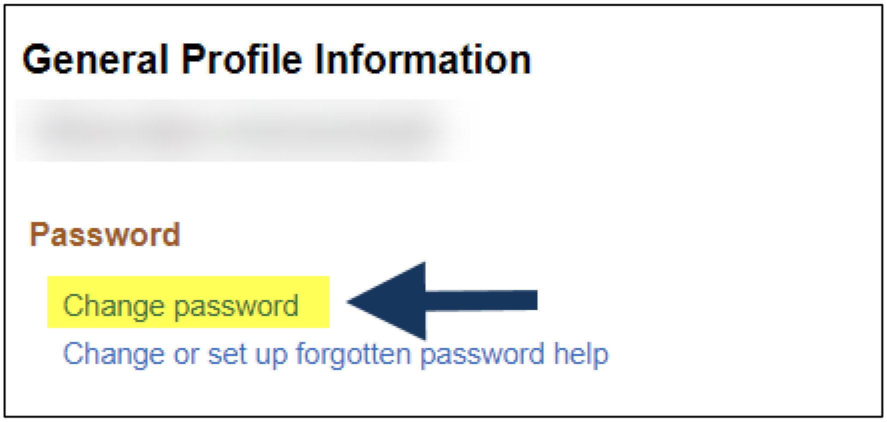
1. In the Email section, **verify/enter your email address**. This will be the address that a temporary password is sent to in the case that you forget your password. This is also the address that is used for absence request email notifications sent to and from your manager.
    a. Make changes in the email address box
    b. Check box to the left of the email address that will be your Primary Email Account
    c. Additional emails can be added for informational purposes
2. Click **Save** to save your changes.



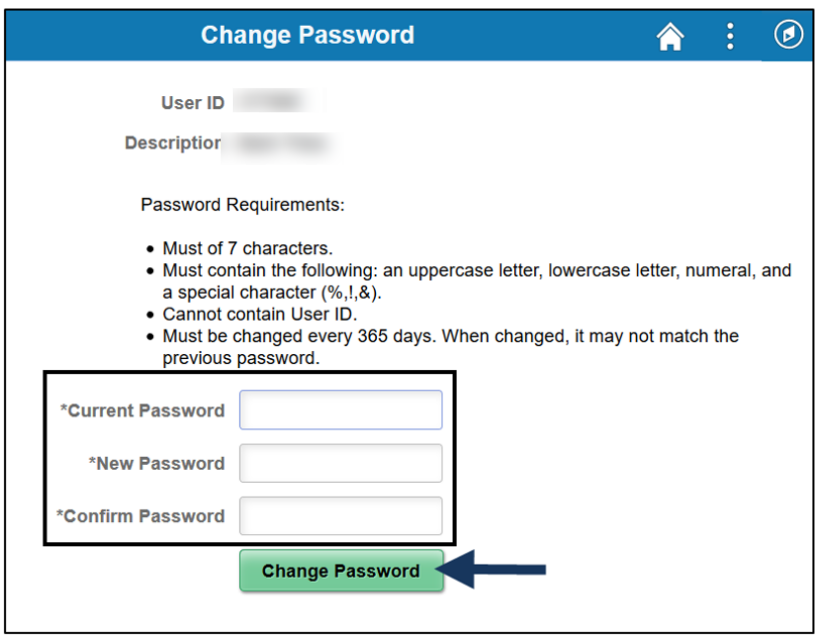
3. If necessary, click **Home** to go to the Homepage.

Change Your Password

1. Go to **PeopleSoft Portal** https://peoplesoft.erp.sdcoe.net
2. Go to: **NavBar**.
3. Click **My Profile** icon.
4. Click on **Change Password.**



5. **Enter Change Password information.**

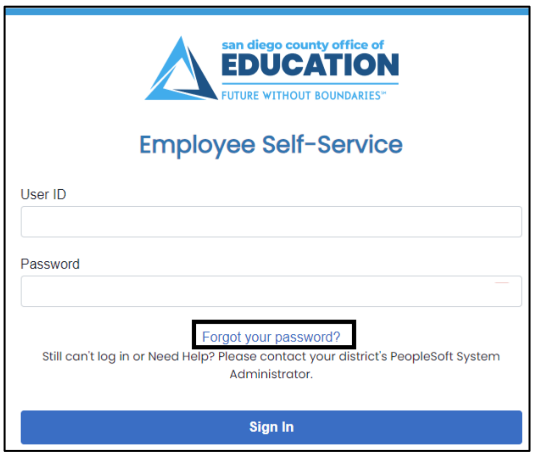


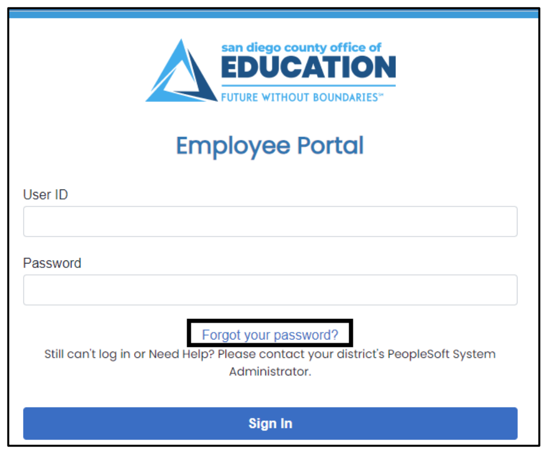
6. Click **Change Password.**

"Forgot My Password" Link for Employees

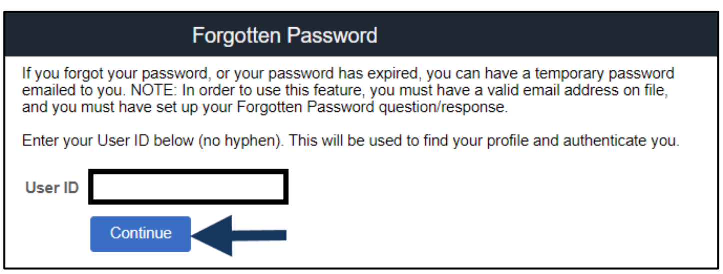
*You may **use the PeopleSoft Portal or Employee Self Service (ESS)** to reset forgotten or expired password if you have previously set up "I Forgot My Password" (p.19). If you did not set this up, please contact your district's PeopleSoft Security Administrator and ask them to reset your password. Be sure to enroll in "I Forgot My Password" for future use!*

1. Go to either **ESS or Production**
   - Employee Self Service https://ess.erp.sdcoe.net.
   - Production *https://peoplesoft.erp.sdcoe.net*
2. Click **Forgot My Password**.

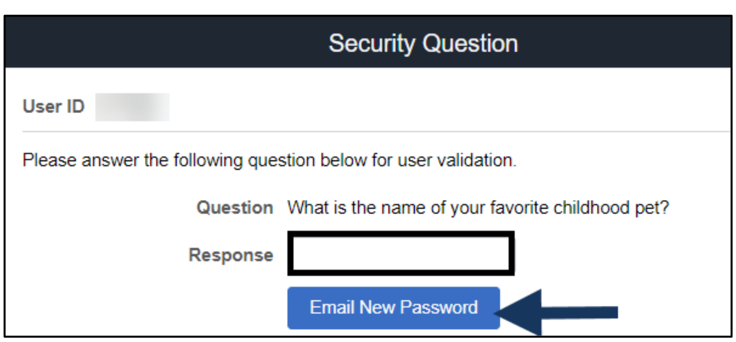




3. Enter 6-digit **User ID** and click **Continue.**



4. You will need to give a **Response** to security question and click **Email New Password.**



5. A temporary password will be emailed to you.

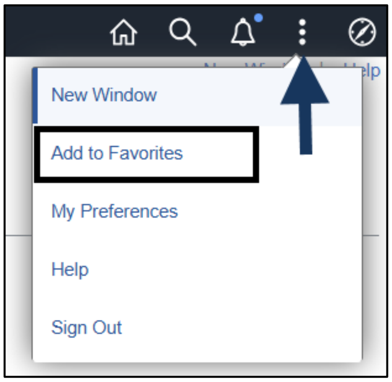
Part III: PeopleSoft Basic Functionality

Using Favorites

You can use Favorite to access screens you frequently use.

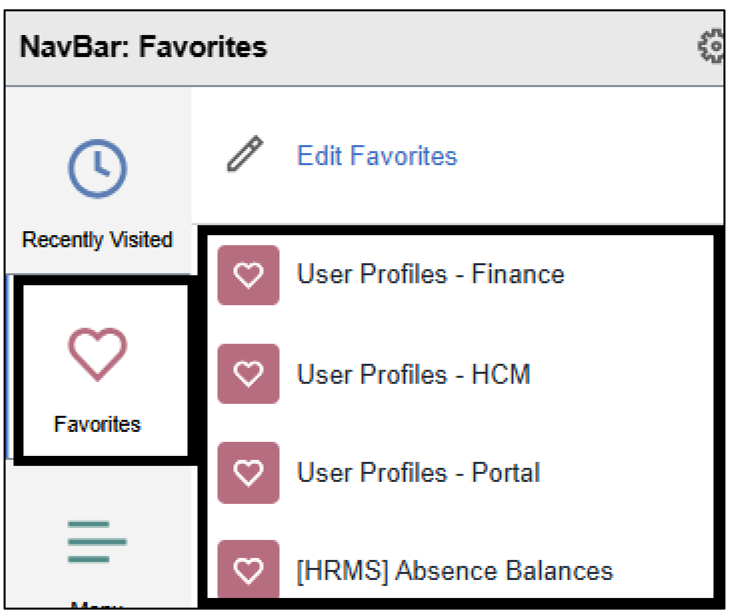
Adding a screen to Favorites

Navigate to the screen you want to add to Favorites. **Click 3 dots** in upper right then click **Add To Favorites.**



Accessing Favorites

From NavBar, click on **My Favorites**. A window opens with a list of your Favorites. Scroll down to see items on your list.



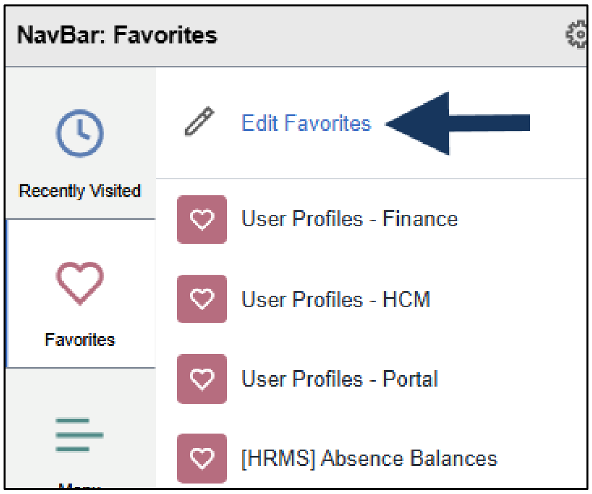
Note about Favorites:

With the system upgrade on May 2, 2022, Favorites for Finance are listed as [ERP] and HCM are listed as [HRMS].

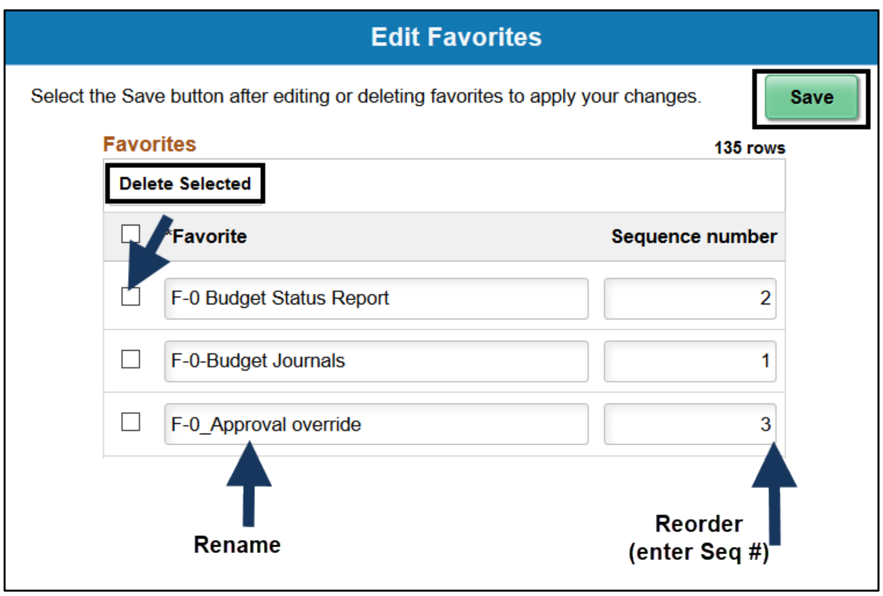
Any Favorites created after May 2, 2022, can be named any way the user wants them.

Editing Favorites

1. To edit your list of favorites, go to My **Favorites**. Select **Edit Favorites**.



2. The Edit Favorites window will appear. Here you can rename, reorder (sequence numbers), and delete your favorites.
   - Using sequence numbers allows you to choose items you want at the top of your list.
3. Click **Save** to save your changes.

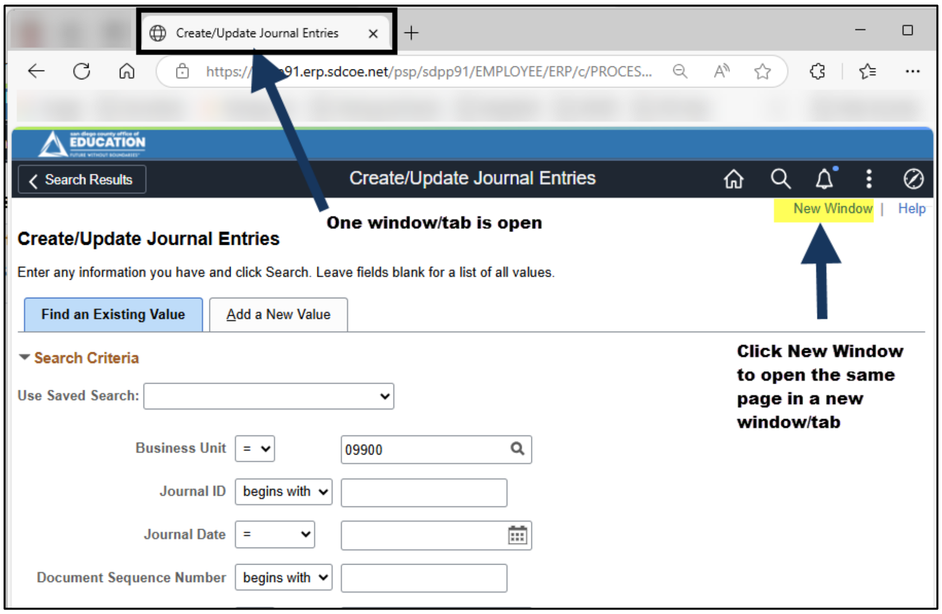


- **Rename:** Type a new name in the field.
- **Reorder:** Enter the desired sequence numbers.
  - Smaller numbers appear at the top of our list
- **Delete** Click the checkbox at the end of the row and click Delete Selected.

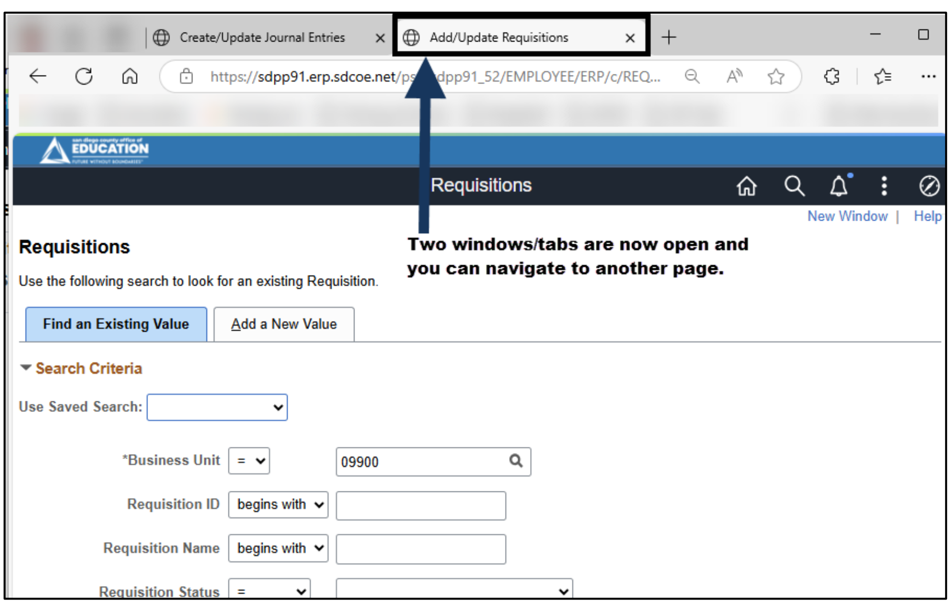
Opening a New Window

TIP! Click **New Window** to have a second window open, which you might find useful for multi-tasking. For example, use the first window for performing transactions, and the second window for looking up information. This is not available on every screen.

In this example, we are on the **Create/Update Journal Entries** with one window/tab open. By clicking **New Window**, the same page will open in a new window/tab.



On the new window/tab, you can then navigate to a different screen or report, if needed. In this example, we have navigated to the **Add/Update Requisitions** page to review a requisition.



Using Find an Existing Value Search

Throughout PeopleSoft, you will see screens that have **Find an Existing Value**. Basic steps are:

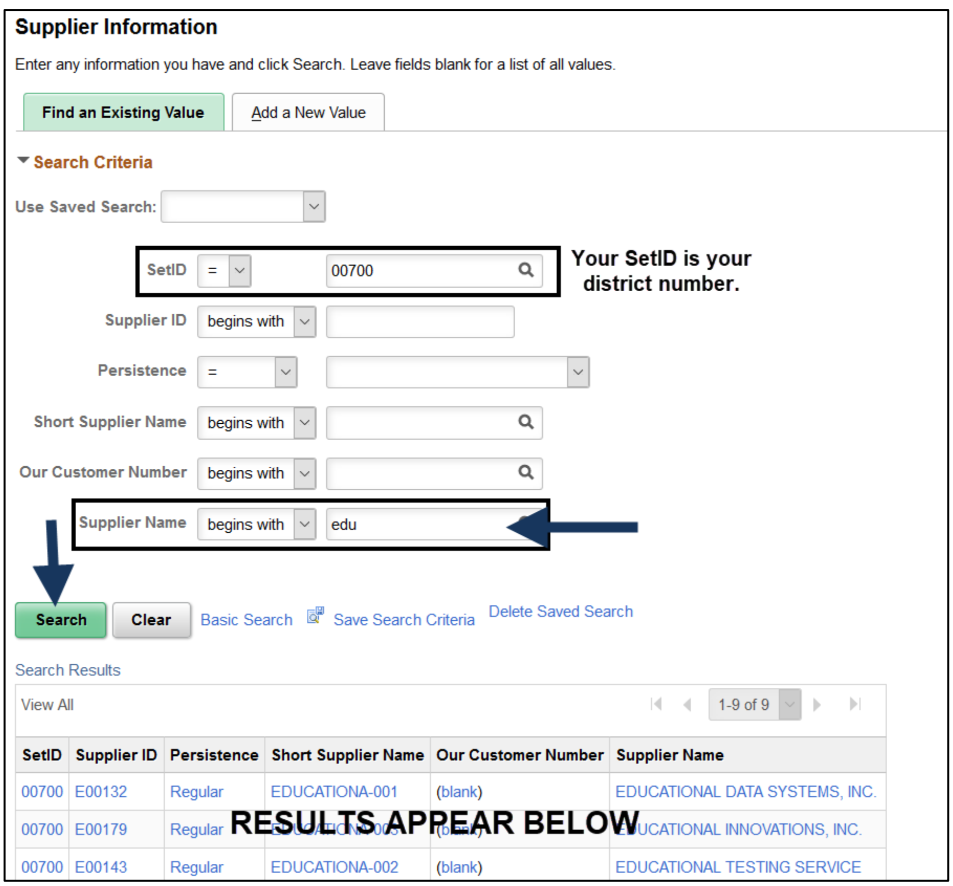
1. Enter search criteria (if desired)
2. Click **Search**
3. **View** the search results
4. **Click the desired record** to get more information.
5. Click **Return to Search** to return to the search screen.

A. Perform the search.

On the **Find an Existing Value** screen and in other areas where you can search, simply **click Search** to see all values. If you want to filter the results, enter search criteria. After you click Search, the results appear on the lower part of the screen. You can sort the results by clicking on a column heading. Click a link to view the record.

FINANCE EXAMPLE – SUPPLIERS "FIND AN EXISTING VALUE" SCREEN

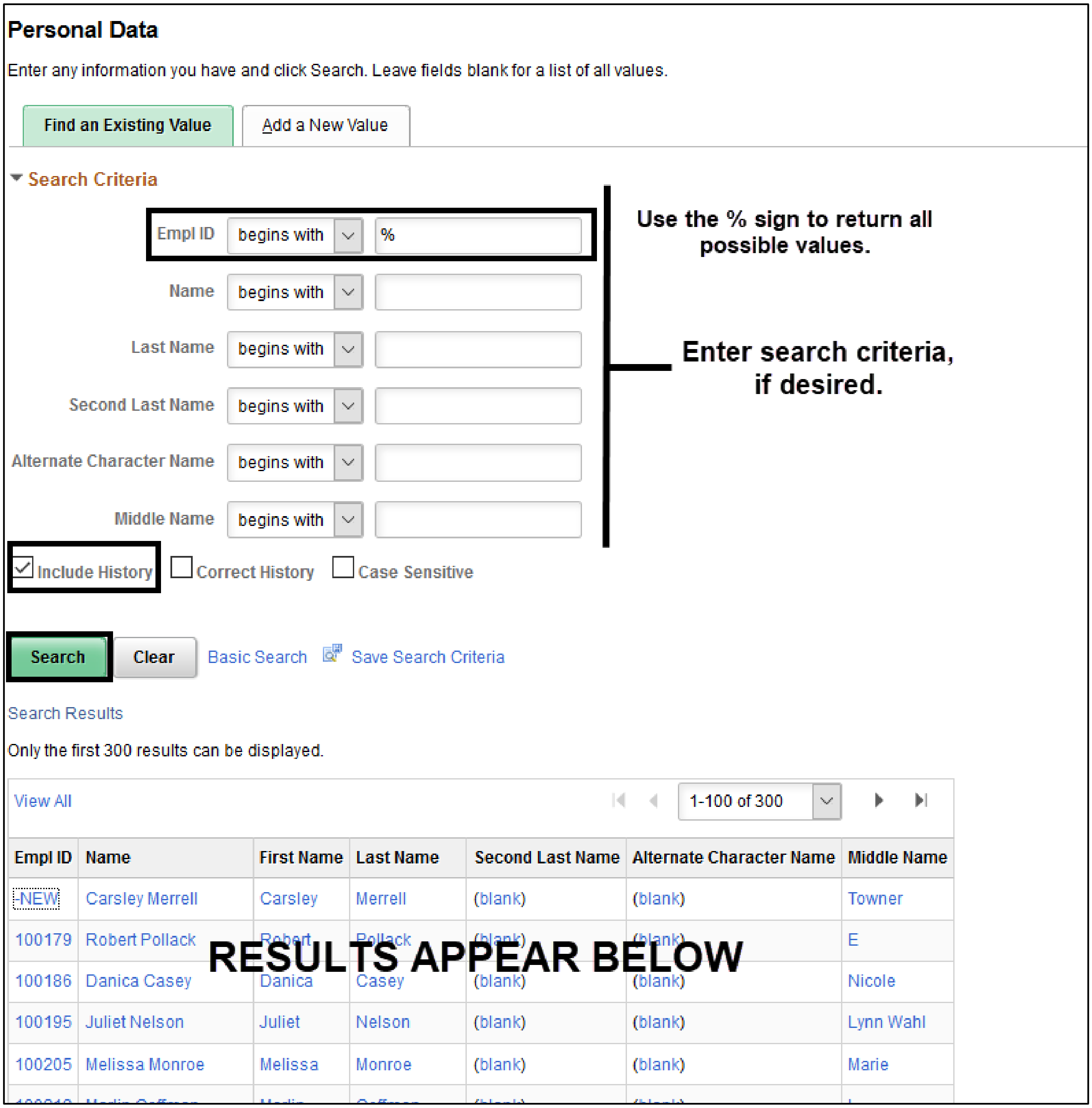
In this example, we are searching for all suppliers (vendors) that begin with "*edu*" for District #007. You can see that there are 6 results. If we had not entered "edu", then *all* suppliers—up to 300—would be returned.



Want to search like a pro? See the techniques on page 30.

HCM EXAMPLE – MODIFY A PERSON "FIND AN EXISTING VALUE" SCREEN

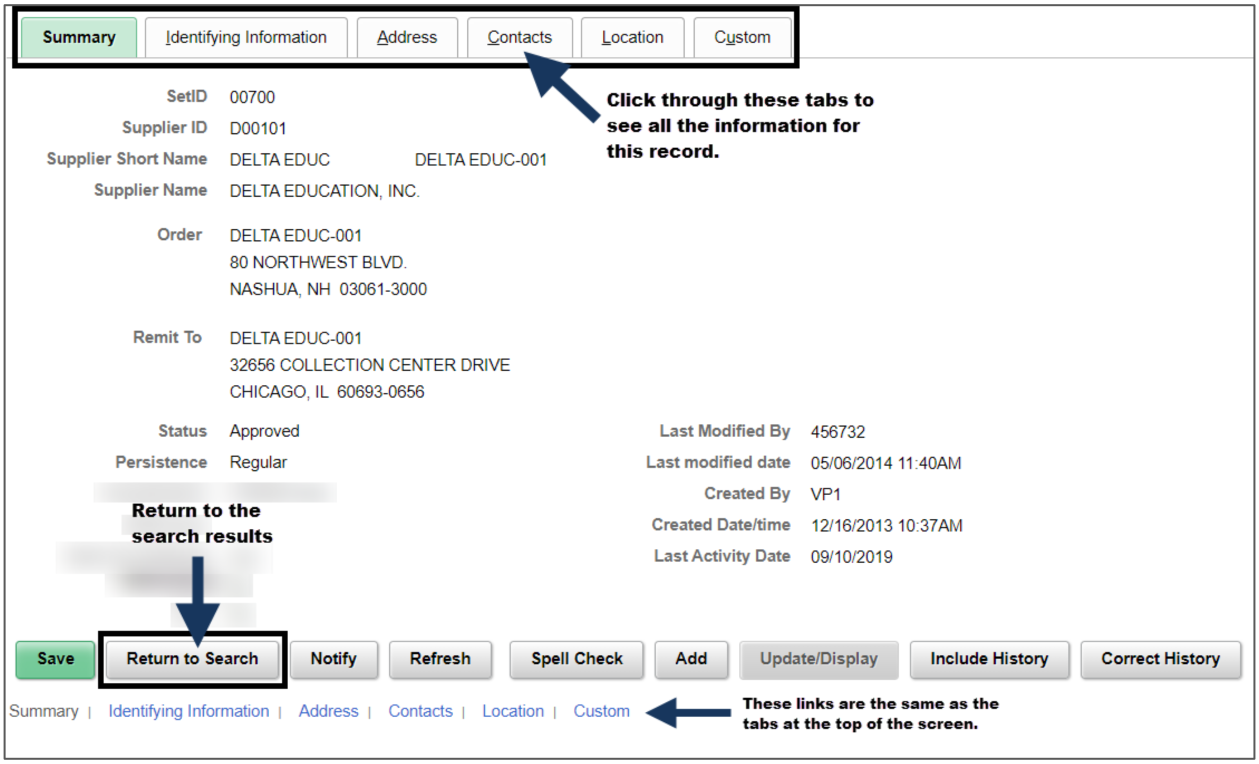
In this example, we are searching for all employees (up to 300) by entering the % sign in the Empl ID field. You can see that there are 300 results. If we wanted to search for a specific employee or narrow the search, we could enter the Employee ID or part of the name as the search criteria.



Want to search like a pro? See the techniques on page 30.

B. View the record.

In the Search Results, click a link to view the record. The way the record is displayed is based on the type of screen you are on. Some display the results with multiple tabs, like the Suppliers screen shown below. Others show the record in a grid or rows.



C. Click Return to Search.

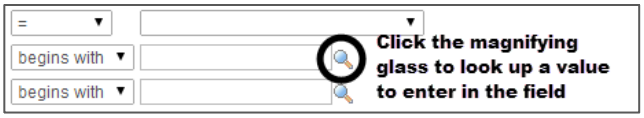
Click **Return to Search** to go back to the results screen (with the same search results).

TIP: If you did not find the right record, you can click **Previous in List** or **Next in List** to go to the previous/next one without having to go back to the results screen.

Search techniques:

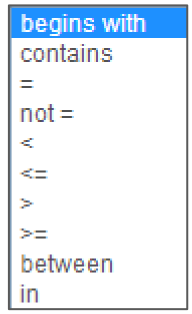
Magnifying glass (lookup)

When entering search criteria, click the magnifying glass (also called the lookup) to open a lookup table. Click the desired value to automatically enter it into the field.



Operators

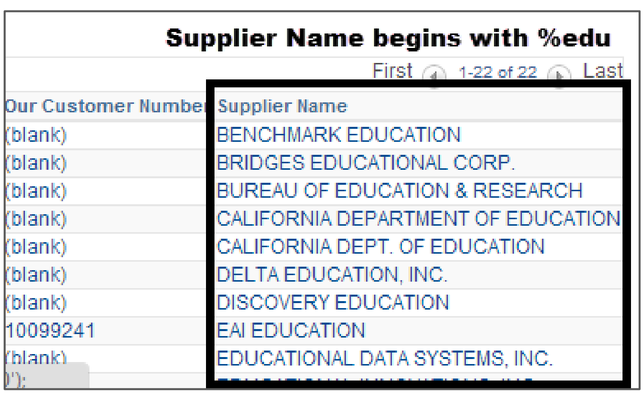
When entering search criteria, use the appropriate operator. Examples of operators are *begins with*, *contains*, *=*, *not =*, and so on.



% Wildcard

Enter only a % sign to return all possible values.

TIP: Use the % sign for a quick "contains" search. In this example, we searched for suppliers that contain *edu* by typing **%edu** as the search criteria.



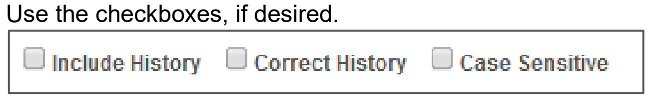
Supplier Name begins with %edu

First 1-22 of 22 Last

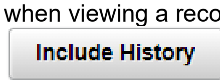
Our Customer Number	Supplier Name
(blank)	BENCHMARK EDUCATION
(blank)	BRIDGES EDUCATIONAL CORP.
(blank)	BUREAU OF EDUCATION & RESEARCH
(blank)	CALIFORNIA DEPARTMENT OF EDUCATION
(blank)	CALIFORNIA DEPT. OF EDUCATION
(blank)	DELTA EDUCATION, INC.
(blank)	DISCOVERY EDUCATION
10099241	EAI EDUCATION
(blank)	EDUCATIONAL DATA SYSTEMS, INC.

Checkboxes

Use the checkboxes, if desired.



Include History: Click the Include History checkbox to include history records when the system processes the search. If you forget to turn this on, you can click the orange "Include History" button at the bottom of a screen when viewing a record.



Correct History: *Very few users have permissions to use this.* If you have access to Correct History, it means that you can correct historical records. If you do not have access to this and need to update/modify a record, add a new row and "effective date" it. See p.31 for information.

Case Sensitive: Turn this on if you want the search to be case sensitive.

Understanding Effective Dates

IMPORTANT! Be aware that PeopleSoft uses effective dates.

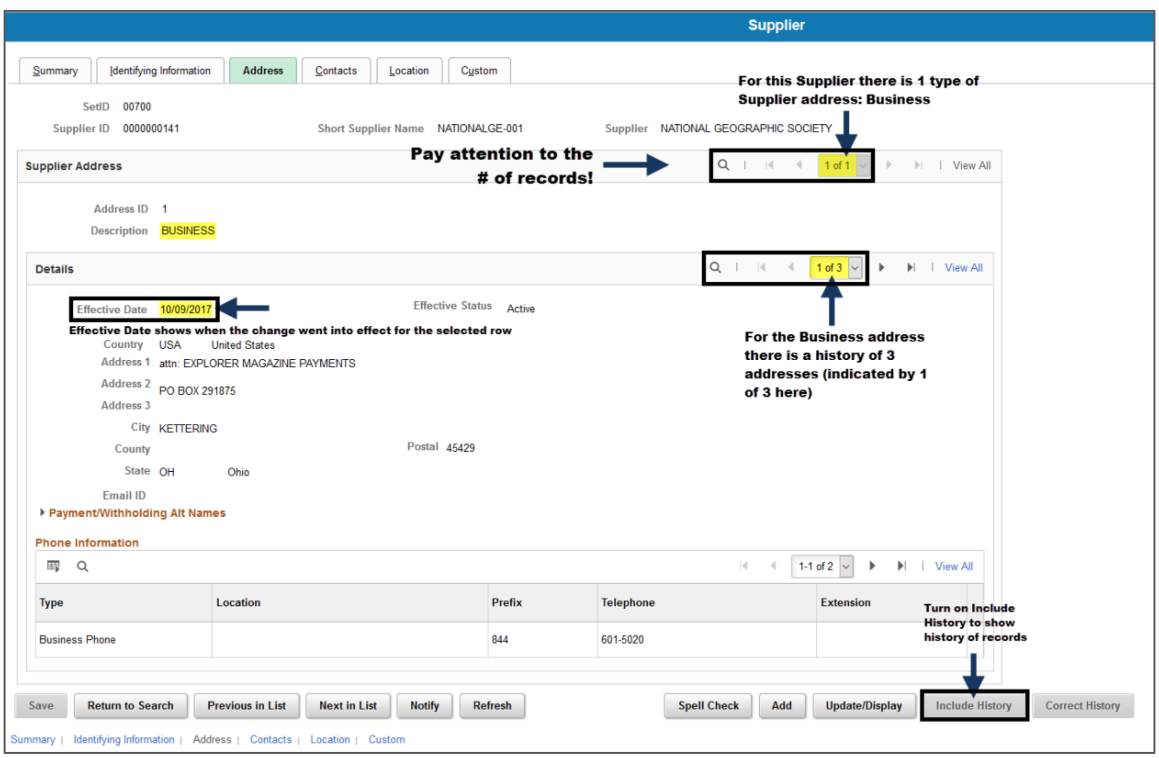
BIG PEOPLESOFT CONCEPT

An effective date is a way to make changes to the system while maintaining the history of how it was before the change. Rather than deleting something or changing the original record, you add a new row and put a date on it.

This means that you never update an old record. You always add a row and "effective date" it. The first record is always the newest record.

- **Example 1 (Finance):** A supplier is moving to a new address at the end of January. Starting February 1, you will need to mail invoices to the new address. To change the information in PeopleSoft Finance, you would go to the supplier record, add a new row (+ sign) for the remittance address, enter February 1 as the effective date, type the new address, and save the record. The system will then start using the new address on February 1 (and will also retain the old address).
- **Example 2 (HCM):** An employee has a legal name change as of August 1 and has turned in the required documentation to HR. To change the record in PeopleSoft HCM, you would go to the Personal Information screen for the employee, add a new row (+ sign) for the name, enter August 1 as the effective date, type the new name, and save the record. The system will start using the new name as of August 1 (and will also retain the old name).

Quick steps: Find the record/row that you want to update. Click the + sign. **Enter the effective date.** Enter the updated information. Click Save. Verify that the number of rows changed, for instance from "1 of 1" to "1 of 2."



Please refer to other PeopleSoft guides for information about situations when you would need use effective dates.

Part IV: Quick Links and WorkCenters

Quick Links

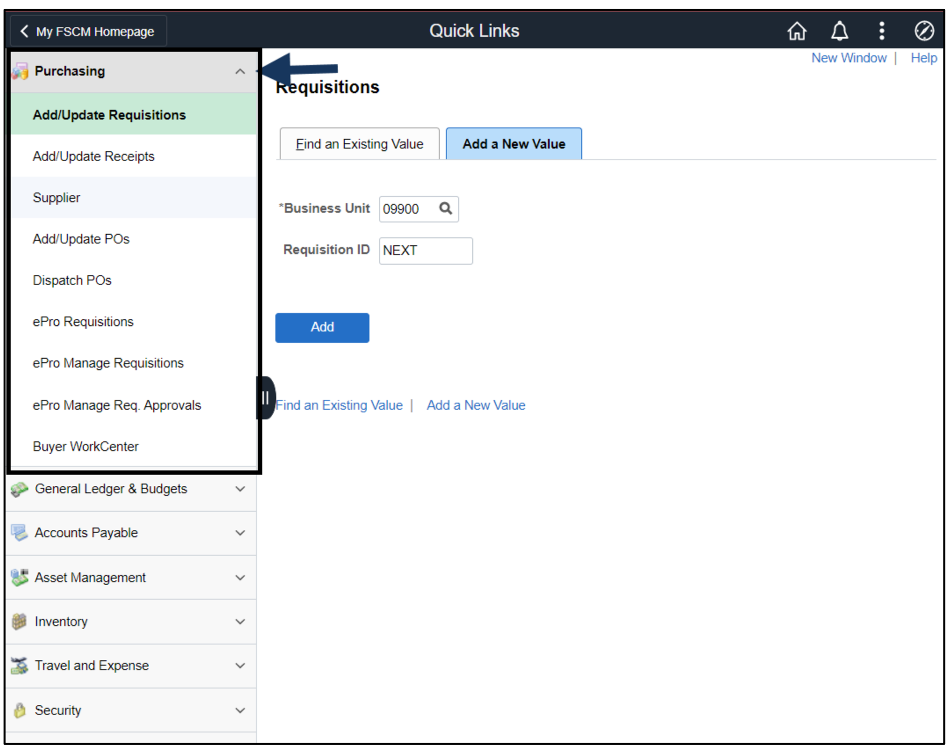
In addition to the basic navigations shared in the Overview section of this guide. You can access your pages by using Quick Links. Access to Quick Links will vary depending on the roles/permissions you have in PeopleSoft

- **Quick Links** have tiles on the homepage for HCM and one for Finance. The page that displays lists frequently used modules in PeopleSoft. These modules have a dropdown list of frequently used links.

Quick Links for Finance

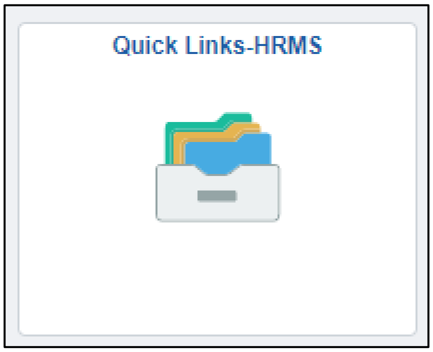
1. From the **My FSCM Homepage**, click the **Quick Links – FSCM tile.**

2. The navigation collection on the left lists different modules. The dropdowns have some of the frequently used pages. This example shows Purchasing pages.

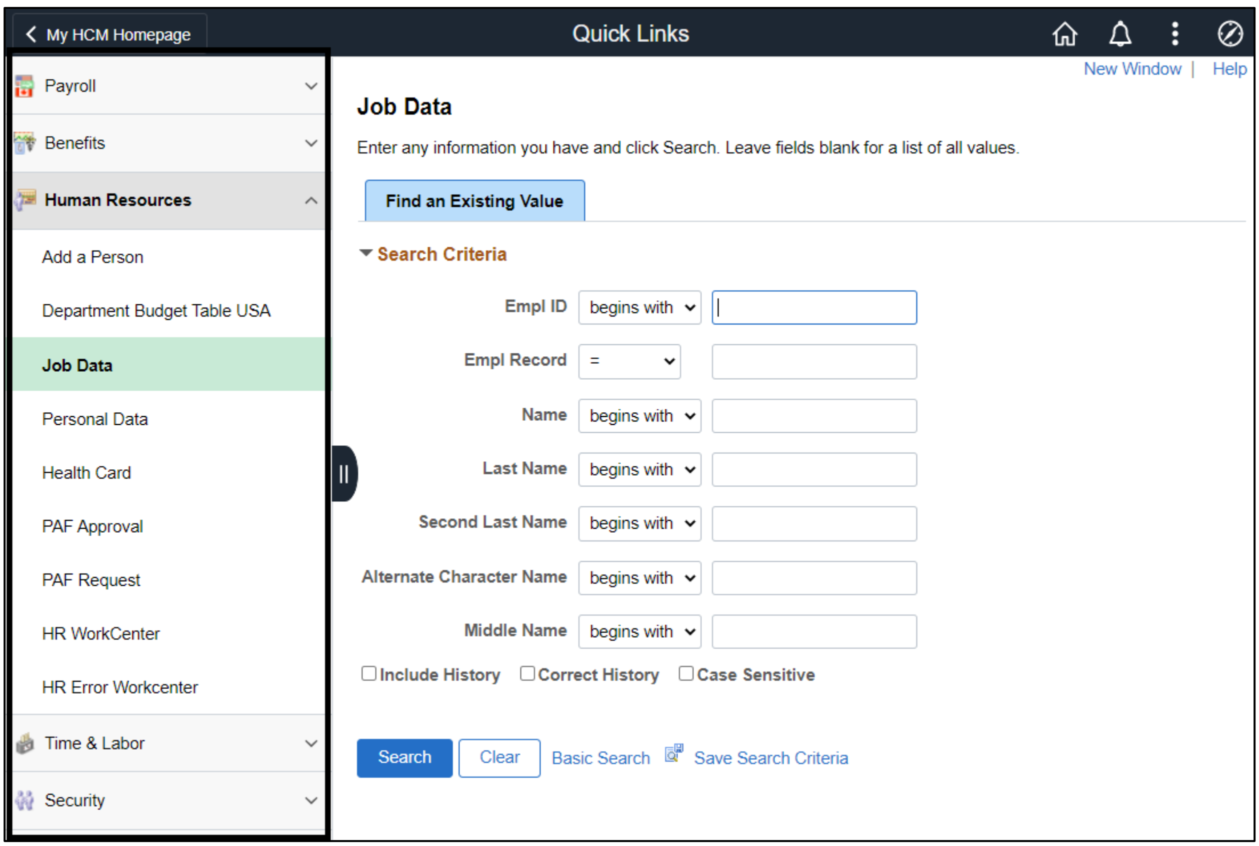


Quick Links for HCM

1. From the **My HCM Homepage**, click the **Quick Links – HRMS tile.**



2. The navigation collection on the left lists different modules. The dropdowns have some of the frequently used pages. This example shows Human Resources pages.



WorkCenters

In addition to the basic navigations shared in the Overview section of this guide. You can access your pages by using WorkCenters. Access to WorkCenters will vary depending on the roles/permissions you have in PeopleSoft

- **WorkCenters** are a set of conveniently clustered job-based links and alerts centered around specific modules. It contains information about your specific work activities, alerts you to tasks that may need to be performed, and provides access to the most commonly used screens, queries and reports.
- **Benefits of PeopleSoft WorkCenters:**
  - One-stop shop with conveniently clustered job-based links and alerts
  - Streamlines training
  - Improves customer efficiency (less clicks and navigation)
  - Overall simplification of customer experience in PeopleSoft

WorkCenters are a great place to start when you are trying to figure out what you are supposed to be doing and how you are going to get there. They are in both Finance and HCM. There are currently 9 WorkCenters to use for day-to-day work. There are also 2 Error WorkCenters in HCM that are used for troubleshooting:

- Buyer's WorkCenter
- General Ledger WorkCenter
- Account Payable WorkCenter
- Asset Management WorkCenter
- Inventory WorkCenter
- Travel and Expense WorkCenter
- Payroll WorkCenter USA
- HR WorkCenter
- Time and Labor WorkCenter
- *Payroll Errors WorkCenter*
- *HR Errors WorkCenter*

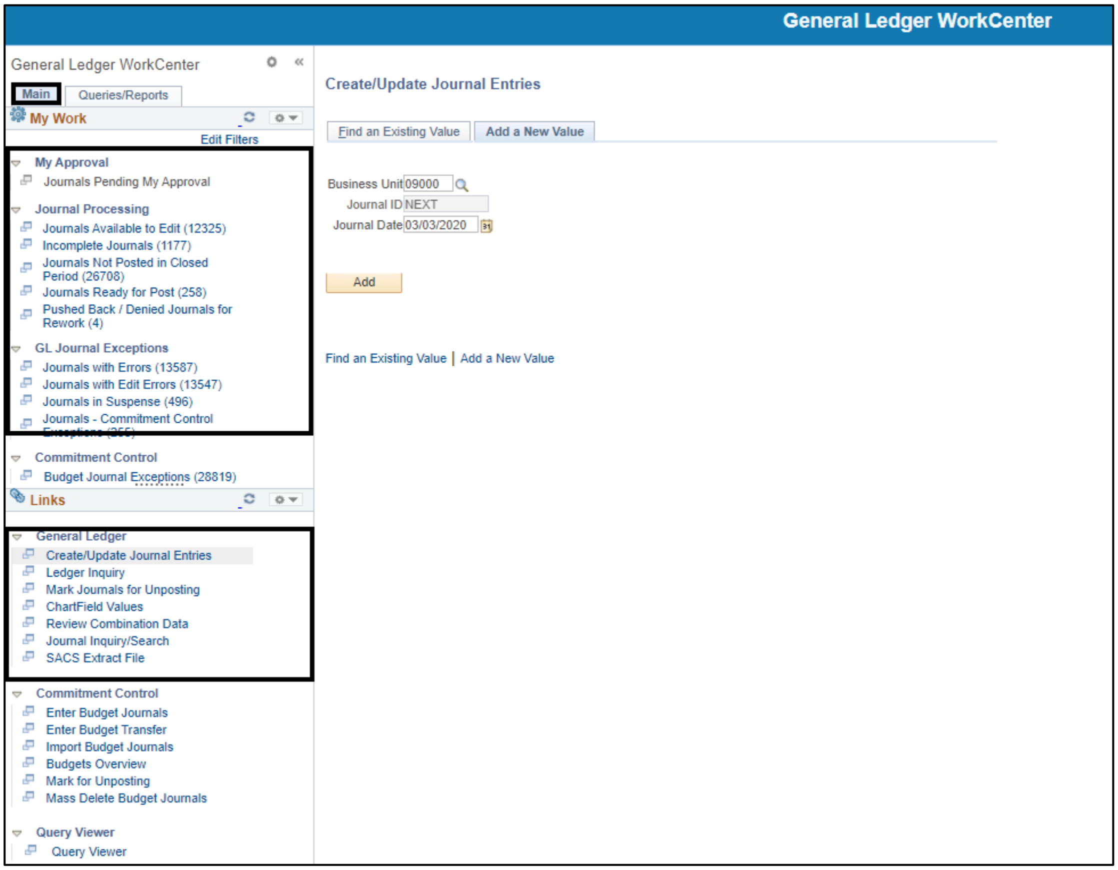
Note: WorkCenter links tend to be at the end of the list when looking at Navigation Collections.

Finance WC Example: FSCM> General Ledger > General Ledger WorkCenter

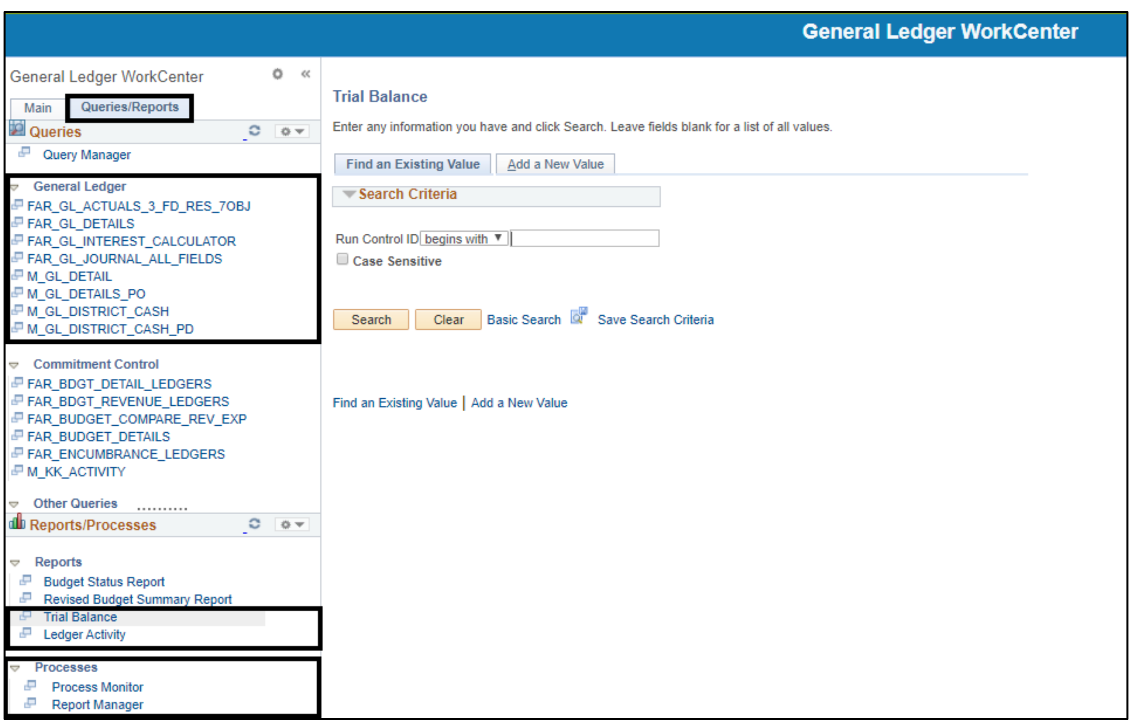
For General Ledger we use the **General Ledger WorkCenter.** The **General Ledger WorkCenter** displays a *My Work* section listing Journal Processing items and GLE Journal Exceptions. The *Links* section contains links to the various screens used for General Ledger functions. Also included, are the most commonly used queries and reports you can run directly from the **WorkCenter**. Some WorkCenters may have a dropdown arrow to the left of link items . You need to click on the arrow to bring up links in the WorkCenter.

- Clicking on an item will open in up in the **window to the right**.
- Clicking on the icon to the left of an item will **open it in a new window**.

The **Main tab** includes *My Work* and *Links.*



The **Queries/Reports tab** includes *Queries* and *Reports/Processes.*

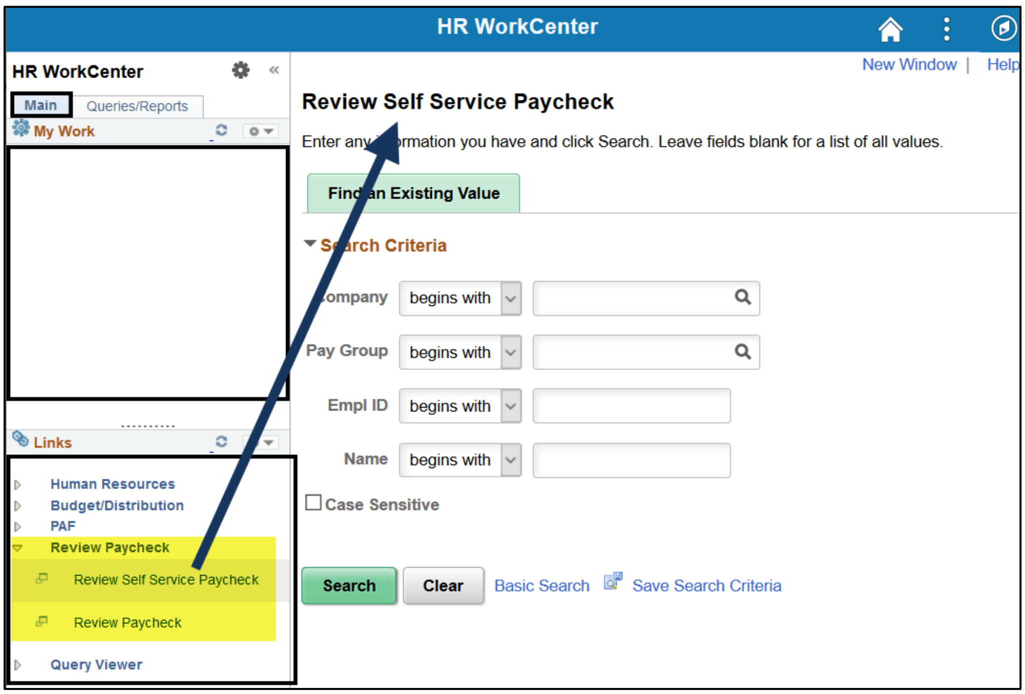


Example HCM WC: Human Resources > HR WorkCenter

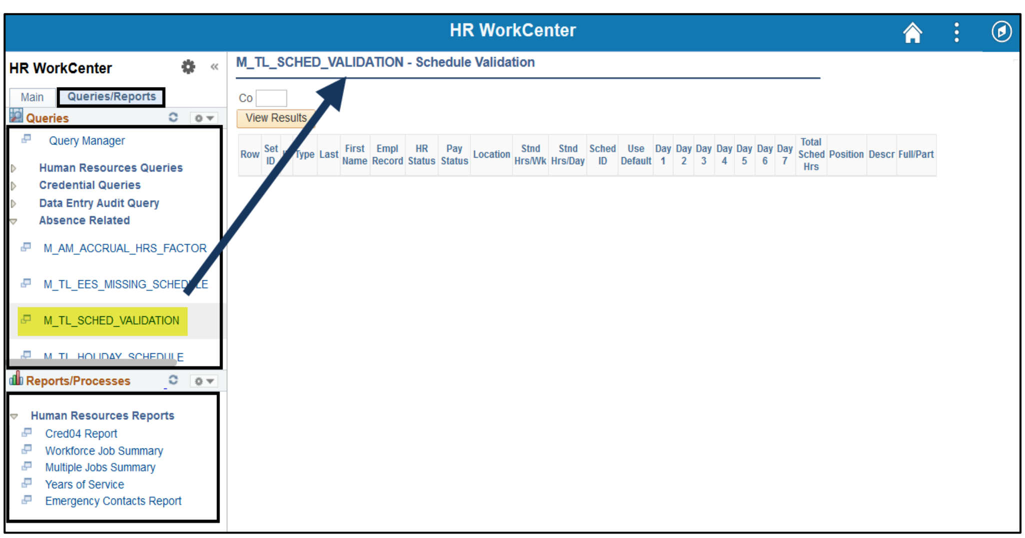
For Human Resource, we use the **HR WorkCenter.** HCM > Workforce Administration > HR WorkCenter. The **HR WorkCenter** displays a *My Work* section and a *Links* section. The *Links* section contains links to the various screens used for HR functions. You will notice that there is a dropdown arrow to the left of link items . You need to click on the arrow to bring up links in this WorkCenter.

- Clicking on an item in the dropdown will open it up in the **window to the right**.
- Clicking on the icon to the left of an item will **open it in a new window**.

The **Main tab** includes *My Work* and *Links.*



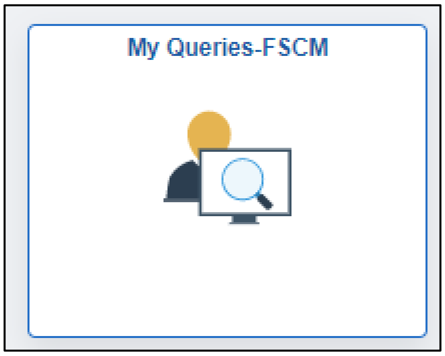
The **Queries/Reports tab** includes *Queries* and *Reports/Processes.*

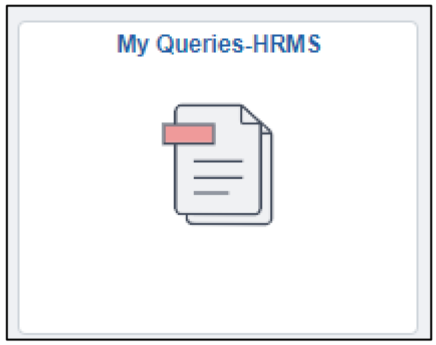


Part III: Reports, Queries and Dashboards

Query Viewer

Query Viewer provides access to standard queries that are used to retrieve data from the system. Refer to the Finance Query Guide and the HCM Query Guide to find a list of queries and their results. Queries can be accessed from the tiles on the Homepages.





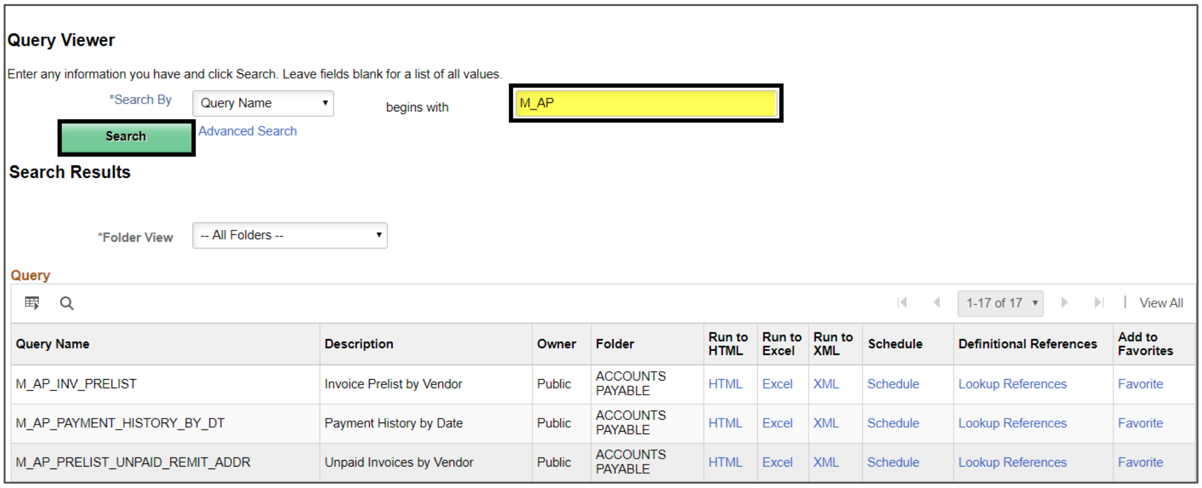
Or from the icons on the NavBar

Running a Query

The steps for running a query in PeopleSoft Finance or HCM are the same. However, there are different queries available in each application. Be sure you select the correct application (Finance or HCM) for the query you want to run.

To run a query in PeopleSoft Finance or HCM, do the following:

1. **Navigate to Query Viewer screen**: NavBar **>** Menu > **select either FSCM or HCM** > Reporting Tools > Query > Query Viewer f
2. **Search** for the desired query. Look for those that begin with *M_* or *FAR_*.
   - The queries that begin with *M_* were developed by the SDCOE PeopleSoft Support team. For example, a search for *M_AP* returns this list of queries:



Query Viewer

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

*Search By Query Name begins with M_AP

Search Advanced Search

Search Results

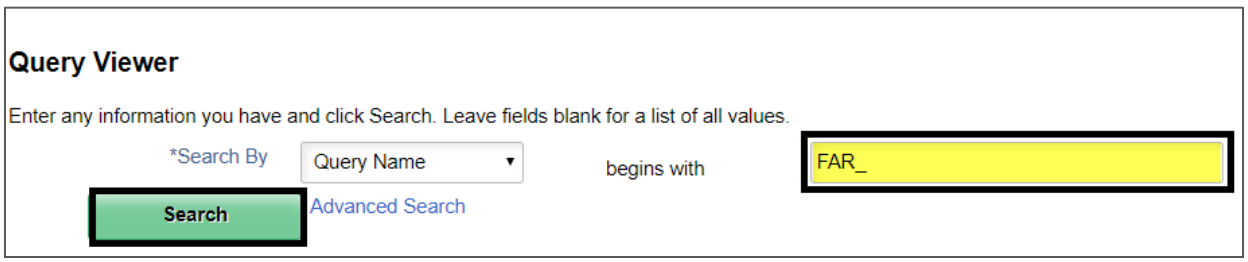
*Folder View -- All Folders --

Query

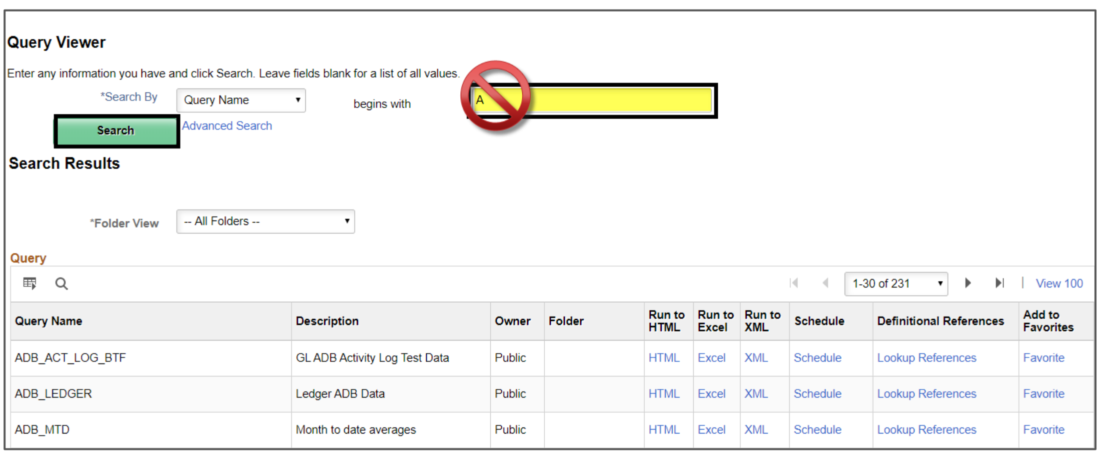
1-17 of 17 View All

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
M_AP_INV_PRELIST	Invoice Prelist by Vendor	Public	ACCOUNTS PAYABLE	HTML	Excel	XML	Schedule	Lookup References	Favorite
M_AP_PAYMENT_HISTORY_BY_DT	Payment History by Date	Public	ACCOUNTS PAYABLE	HTML	Excel	XML	Schedule	Lookup References	Favorite
M_AP_PRELIST_UNPAID_REMIT_ADDR	Unpaid Invoices by Vendor	Public	ACCOUNTS PAYABLE	HTML	Excel	XML	Schedule	Lookup References	Favorite

- Those that begin with *FAR_* were created by SDCOE Financial Accounting.



- If the query name starts with the letter *A* (or any other letter or number, except for *M_* or *FAR_*) then it is system delivered. Those queries were not developed by SDCOE. We typically do not use those queries.



Query Viewer

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

*Search By Query Name begins with A

Search Advanced Search

Search Results

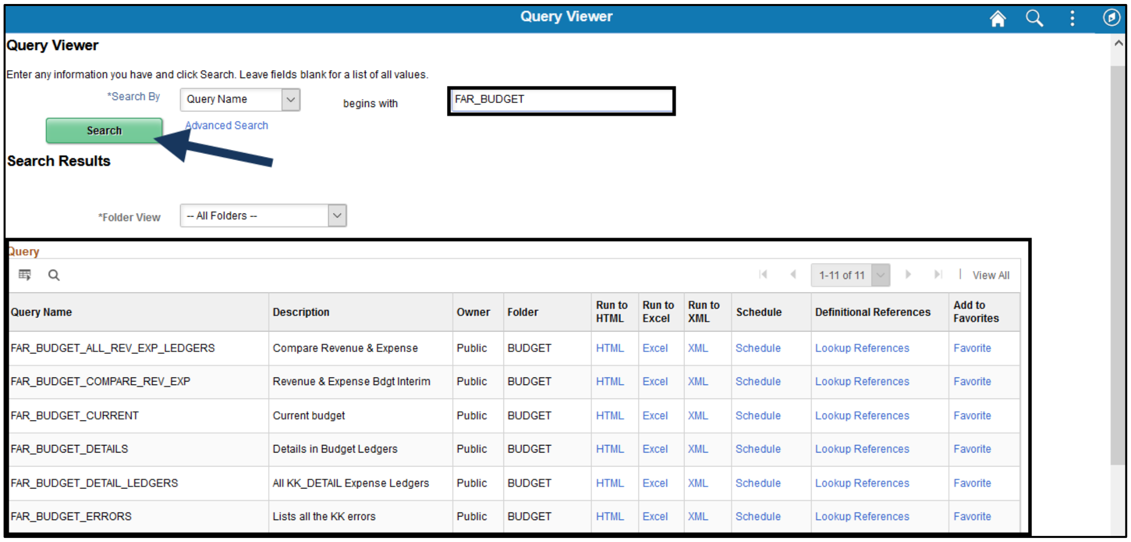
*Folder View -- All Folders --

Query

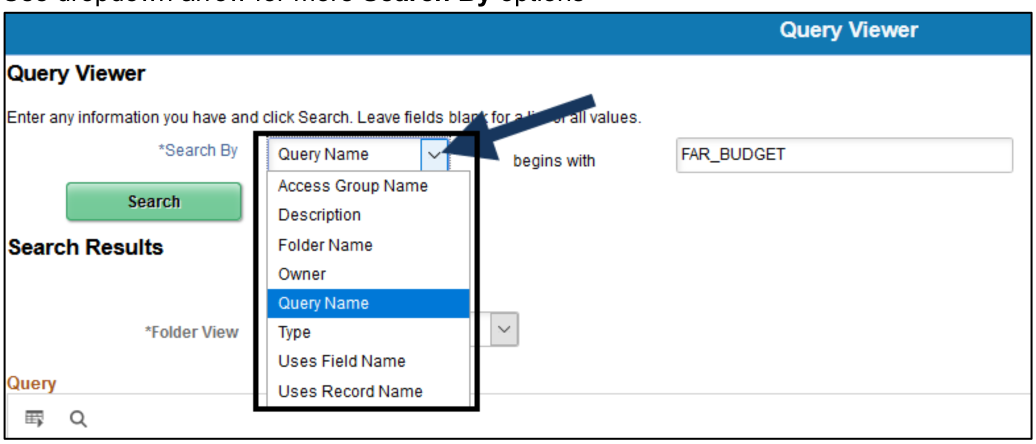
1-30 of 231 View 100

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
ADB_ACT_LOG_BTF	GL ADB Activity Log Test Data	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
ADB_LEDGER	Ledger ADB Data	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
ADB_MTD	Month to date averages	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

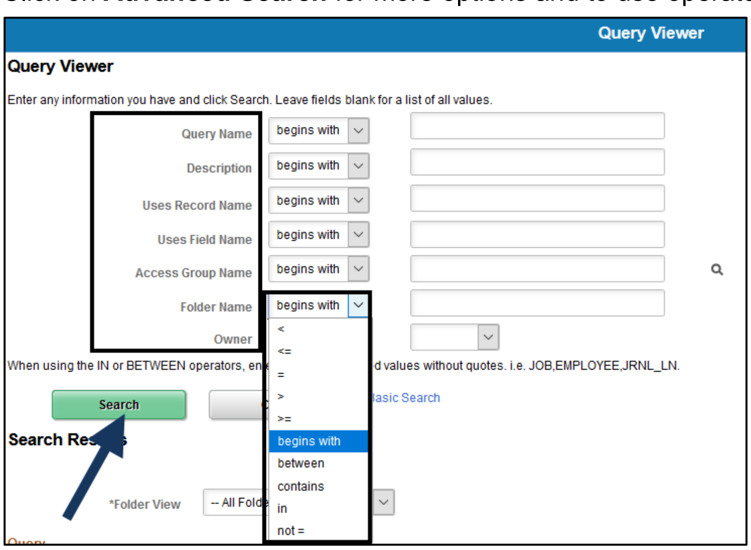
3. There are several ways to search for a query. Here we searched for **FAR_BUDGET** by typing part of the name of the query and clicking **Search.**



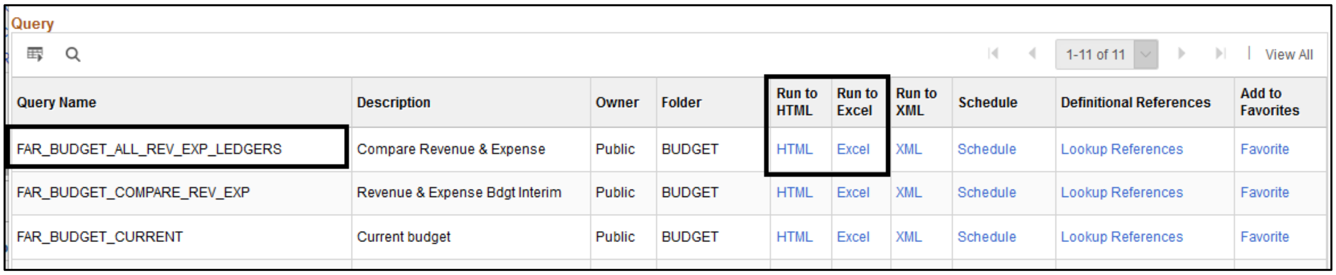
- Use dropdown arrow for more **Search By** options



- Click on **Advanced Search** for more options and to use operators



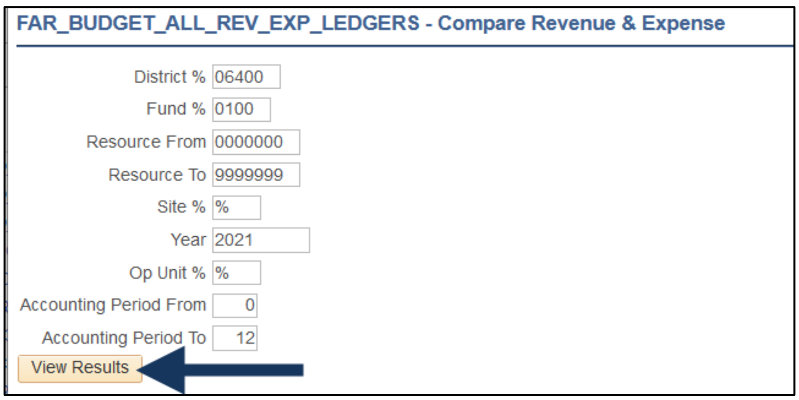
4. In the *Query* results, find the query you want and click **HTML** (for onscreen viewing) or **Excel** (to download). A good practice is to click **HTML** to view your results onscreen. If you like the results, you can export to an Excel spreadsheet with a single click from the results page.



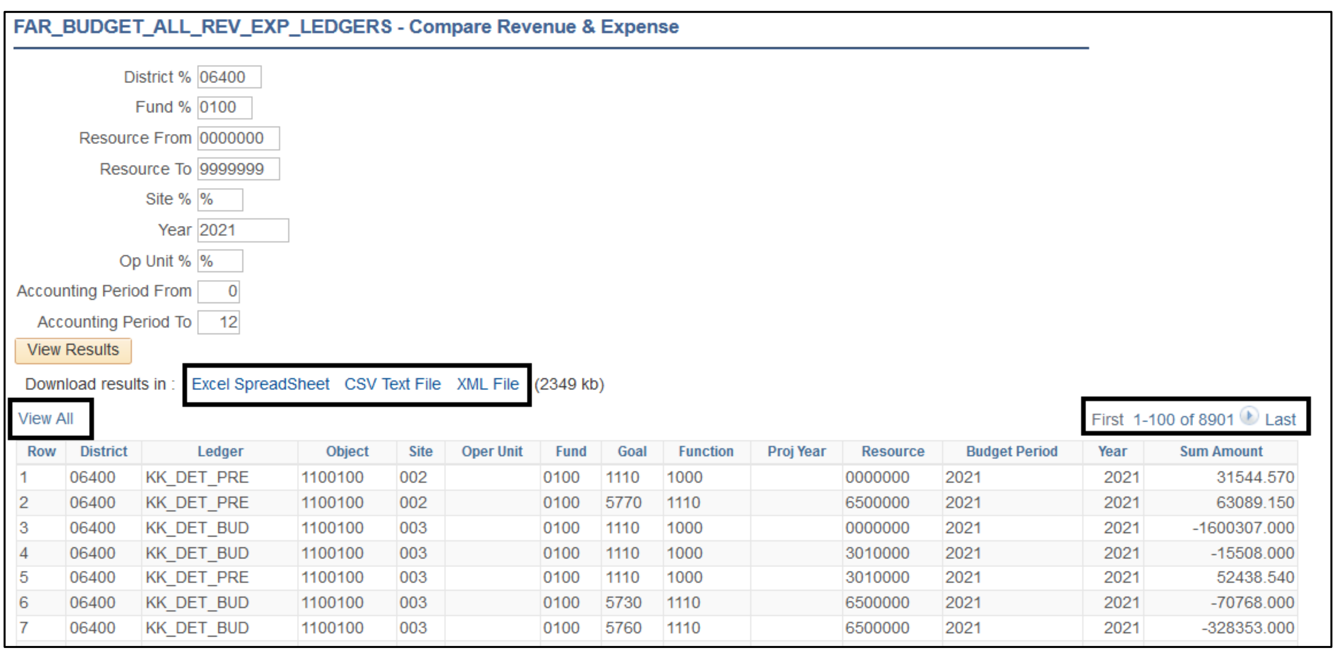
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
FAR_BUDGET_ALL_REV_EXP_LEDGERS	Compare Revenue & Expense	Public	BUDGET	HTML	Excel	XML	Schedule	Lookup References	Favorite
FAR_BUDGET_COMPARE_REV_EXP	Revenue & Expense Bdgt Interim	Public	BUDGET	HTML	Excel	XML	Schedule	Lookup References	Favorite
FAR_BUDGET_CURRENT	Current budget	Public	BUDGET	HTML	Excel	XML	Schedule	Lookup References	Favorite

5. **Enter** relevant information into each of the **parameters**.

- Each parameter or prompt must have a value, it cannot be left blank unless it states "Optional".
- A parameter or prompt label followed by a percent sign (%) indicates that you may enter the percent sign as a wildcard to return all results. For example, enter % in the Fund field prompt if you want to pull all funds.



6. Click **View Results.**



Row	District	Ledger	Object	Site	Oper Unit	Fund	Goal	Function	Proj Year	Resource	Budget Period	Year	Sum Amount
1	06400	KK_DET_PRE	1100100	002		0100	1110	1000		0000000	2021	2021	31544.570
2	06400	KK_DET_PRE	1100100	002		0100	5770	1110		6500000	2021	2021	63089.150
3	06400	KK_DET_BUD	1100100	003		0100	1110	1000		0000000	2021	2021	-1600307.000
4	06400	KK_DET_BUD	1100100	003		0100	1110	1000		3010000	2021	2021	-15508.000
5	06400	KK_DET_PRE	1100100	003		0100	1110	1000		3010000	2021	2021	52438.540
6	06400	KK_DET_BUD	1100100	003		0100	5730	1110		6500000	2021	2021	-70768.000
7	06400	KK_DET_BUD	1100100	003		0100	5760	1110		6500000	2021	2021	-328353.000

7. **Review the data.** Note the number of rows on the right. You have other options:
   - Review data here. If you cannot see all the rows, click View All on the left
   - Export data to Excel Spreadsheet, CSV or XML file
8. **Need other results?** Change parameters and click View Results again.
9. Query results tab can remain open if you need to refer back to the data. If not, close the tab by clicking on the X.

   Reminder that this page will time out after 90 minutes.
10. Click View Results

Running Reports

The steps to generate a PeopleSoft report are very similar, regardless of the specific report that you want to generate. Here are the basic steps for running a report:

A Navigate to the report → **B** Enter/find the Run Control ID → **C** Enter or update the parameters, then Run → **D** Monitor the report process (if desired) → **E** View the report

A. Navigate to the report.

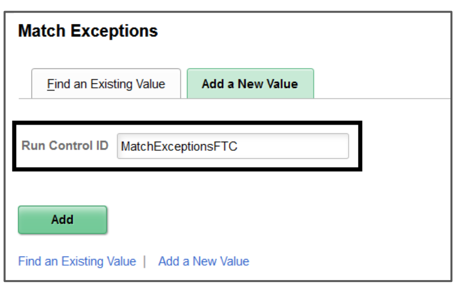
Navigation will vary according to the type of the report. Some may be available from **WorkCenters** others may need to be accessed from the **NavBar > Menu**.

For example, to run the **Match Exceptions** report, navigate to **NavBar > Menu > FSCM > Accounts Payable > Reports > Vouchers > Match Exceptions**. Please refer to other PeopleSoft guides and job aids for more information about specific reports.

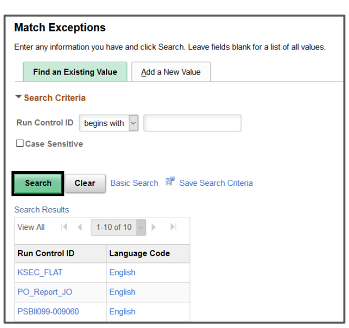
B. Enter/find the Run Control ID.

The Run Control ID is the report request. It is the entry in the system that remembers your report selection criteria and other run parameters. **NOTE**: You cannot delete run Control IDs.

FIRST TIME: Click **Add a New Value**. Enter a Run Control ID (your choice), which is a unique name with no spaces. You can use underscore in place of the space. Click **Add**. This will take you to the screen where you enter the parameters.

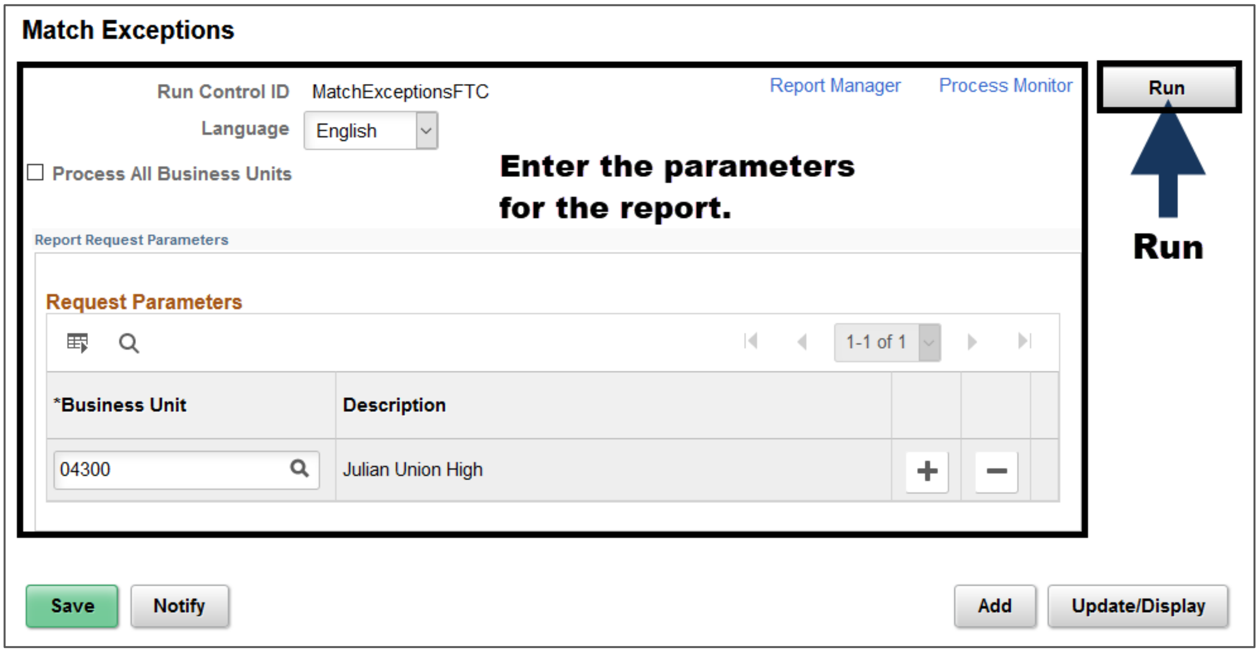


SUBSEQUENT RUNS: After you add a Run Control ID, you can reuse it, even if you want to change the selection criteria or other report parameters. Click **Find an Existing Value** and search for the desired Run Control ID.



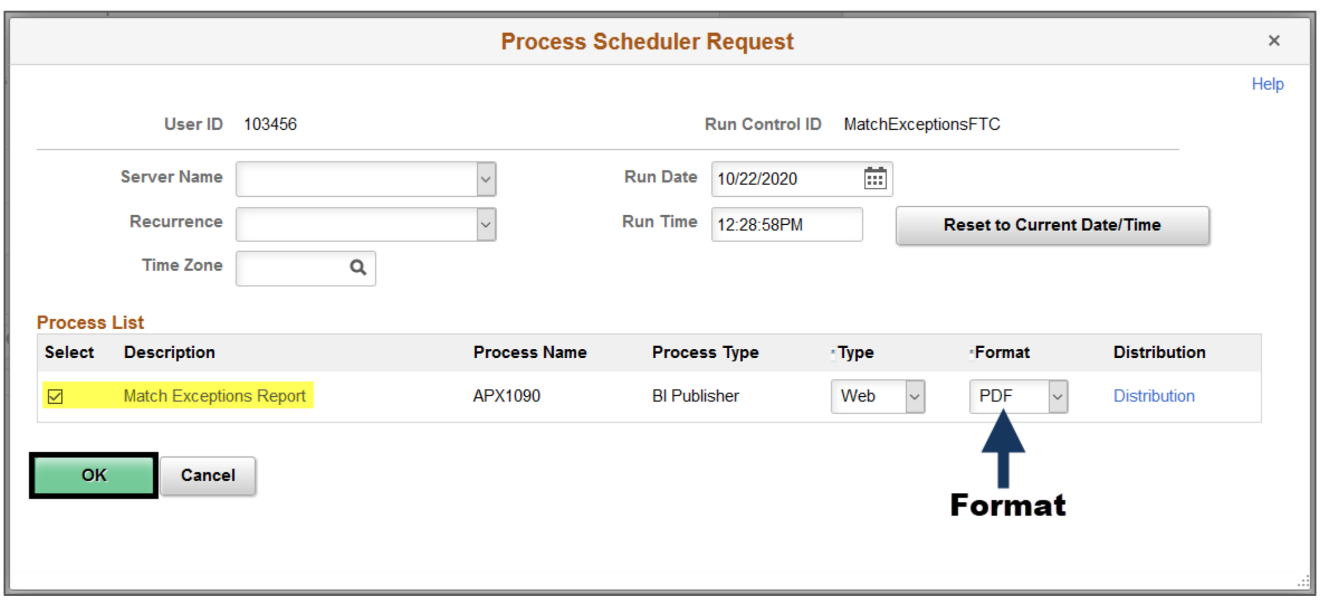
C. Enter/update the parameters, then run the report.

1. Every report will contain run request parameters. They will change based on the nature of the report. You should set the parameters according to the information you need. The parameters are saved when you click on either the Save or Run buttons.



2. Click **Run** to generate the report. This will open the Process Scheduler Request window.

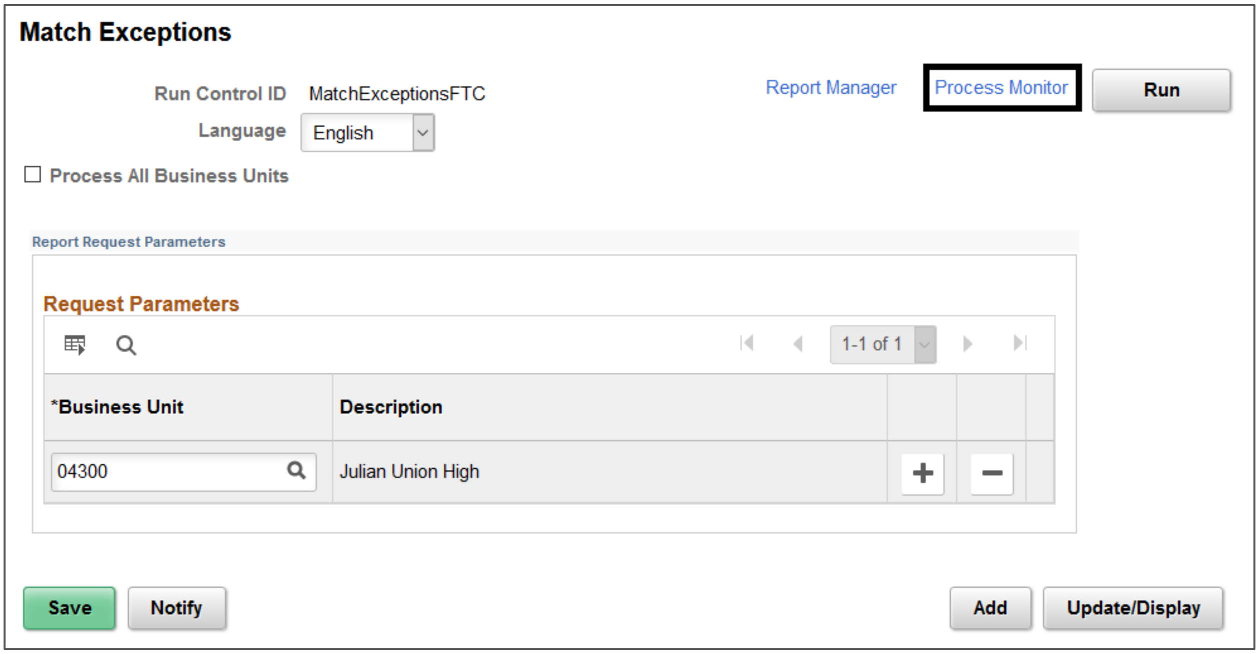
3. In the Process Scheduler Request window, verify that the desired report is checked. If more than one report can be generated, they will all be displayed, and you should select the one you need. Select the format (HTM, PDF, RTF, XLS). Click **OK** to start the report generation process.

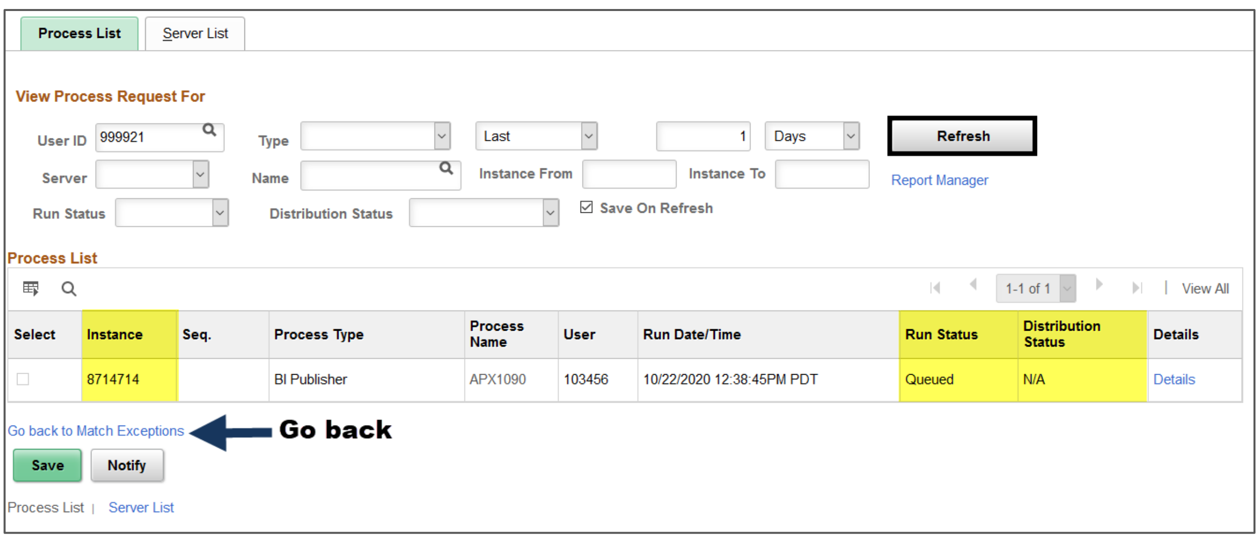


4. Go back to the Report Request (parameters) page.

D. Monitor the report process, if desired.

1. Click the **Process Monitor** link to view the status of the report being generated. This will open the screen where you can check its status. If preferred, skip this step and go directly to the Report Manager.



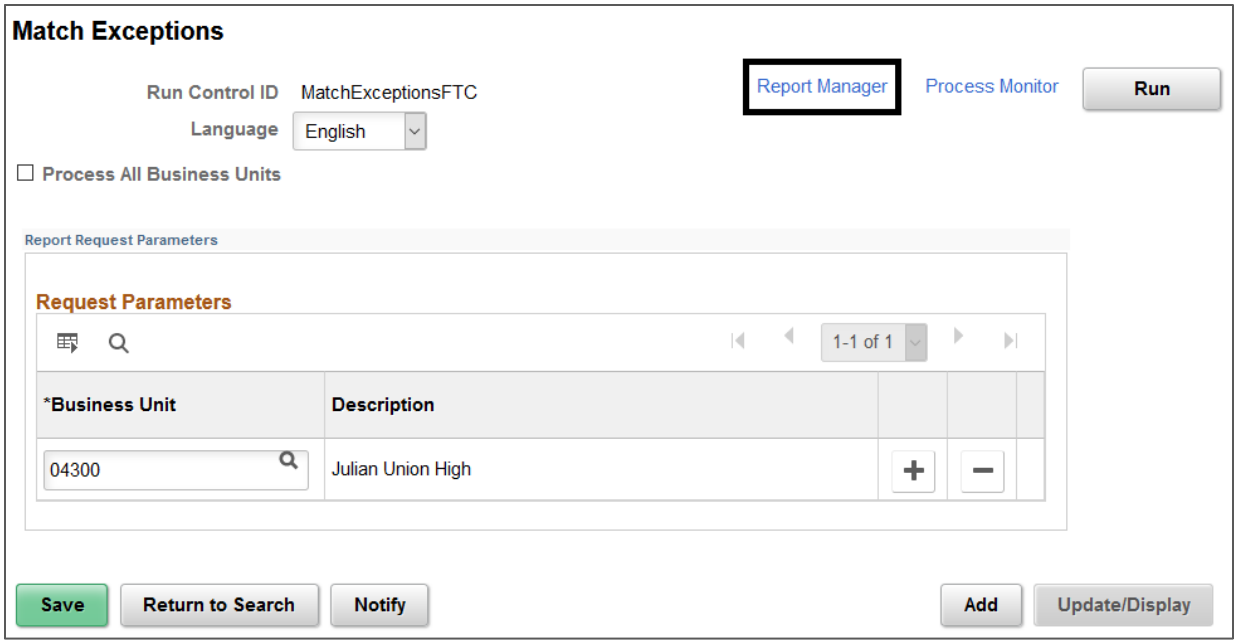


2. Click the **Refresh** button to update the status. When the report process is completed, **Run Status** = *Success* and **Distribution Status** = *Posted*.

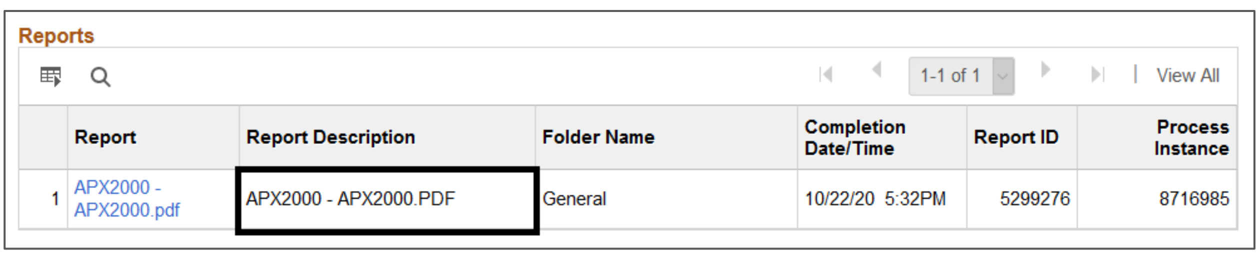
3. Select the link provided to go back to your Report Request page. (Advanced users can click Details > View Log Trace and check the report from the Process Monitor.)

E. View the report.

1. On your Report Request page, click the **Report Manager** link. This takes you to your Report Manager, where you can retrieve your reports.



2. Select the **Administration** tab.
3. View the report by clicking on the link in the **Description** field.



	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	APX2000 - APX2000.pdf	APX2000 - APX2000.PDF	General	10/22/20 5:32PM	5299276	8716985

- **TIP:** Use the **Process Instance** and **Request Date/Time** columns to help you identify the desired report.
- PDF reports will open if you have Adobe Reader installed on your computer. You can save and email the pdf version of the report.

4. You have successfully generated a report.

Sample Report

ORACLE®

Report ID: APX2000

PeopleSoft Accounts Payable
SUMMARY PAYMENT HISTORY BY SUPPLIER
From: Sep/1/2020 To: Oct/22/2020

Page No 1
Run Date 10/22/2020
Run Time 5:27:33 PM

Remit Supplier: 09900 A811

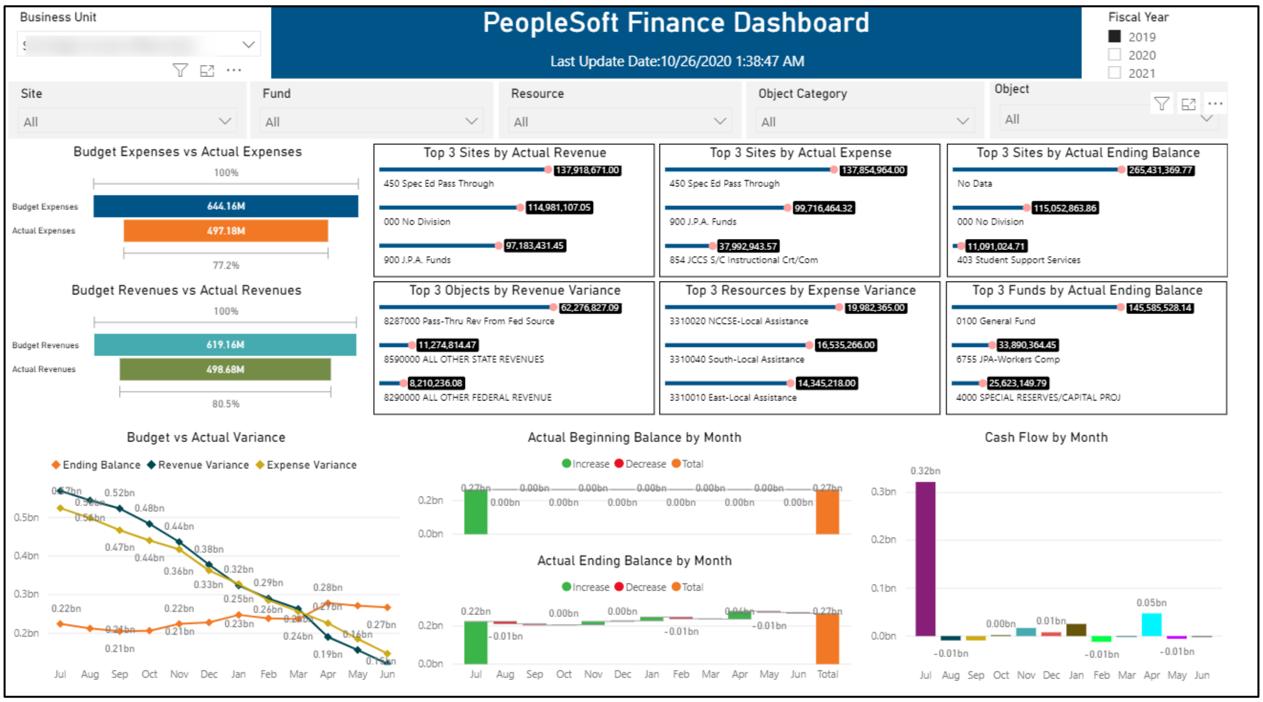
Payment Currency: USD

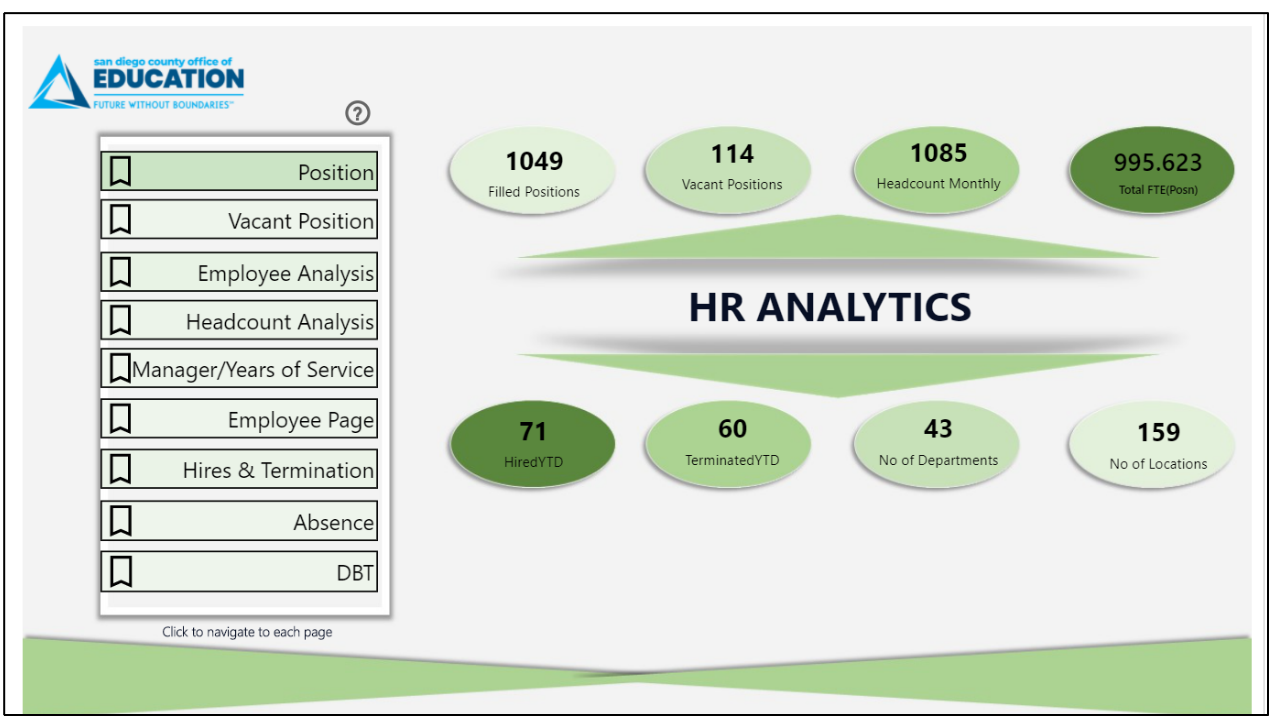
Bank Account: APP *****2699

Payment Ref	Date	Handling	Status	Remit To	Pay Cycle	Seq	Payment Amount	Document Sequence
[illegible]	Sep/3/2020	RE	Paid	[illegible]	DAILY	1580	1,154.58 USD	
[illegible]	Sep/10/2020	RE	Paid	[illegible]	DAILY	1582	7,345.86 USD	
[illegible]	Sep/14/2020	RE	Paid	[illegible]	DAILY	1583	590.14 USD	
[illegible]	Sep/24/2020	RE	Paid	[illegible]	DAILY	1586	4,510.96 USD	

Dashboards

CBO Finance Dashboard and HR Analytics Dashboard give a high-level overview of data from PeopleSoft for CBO's. Administrators and Superintendents. District approval is required. Submit a Service Now ticket to request access.



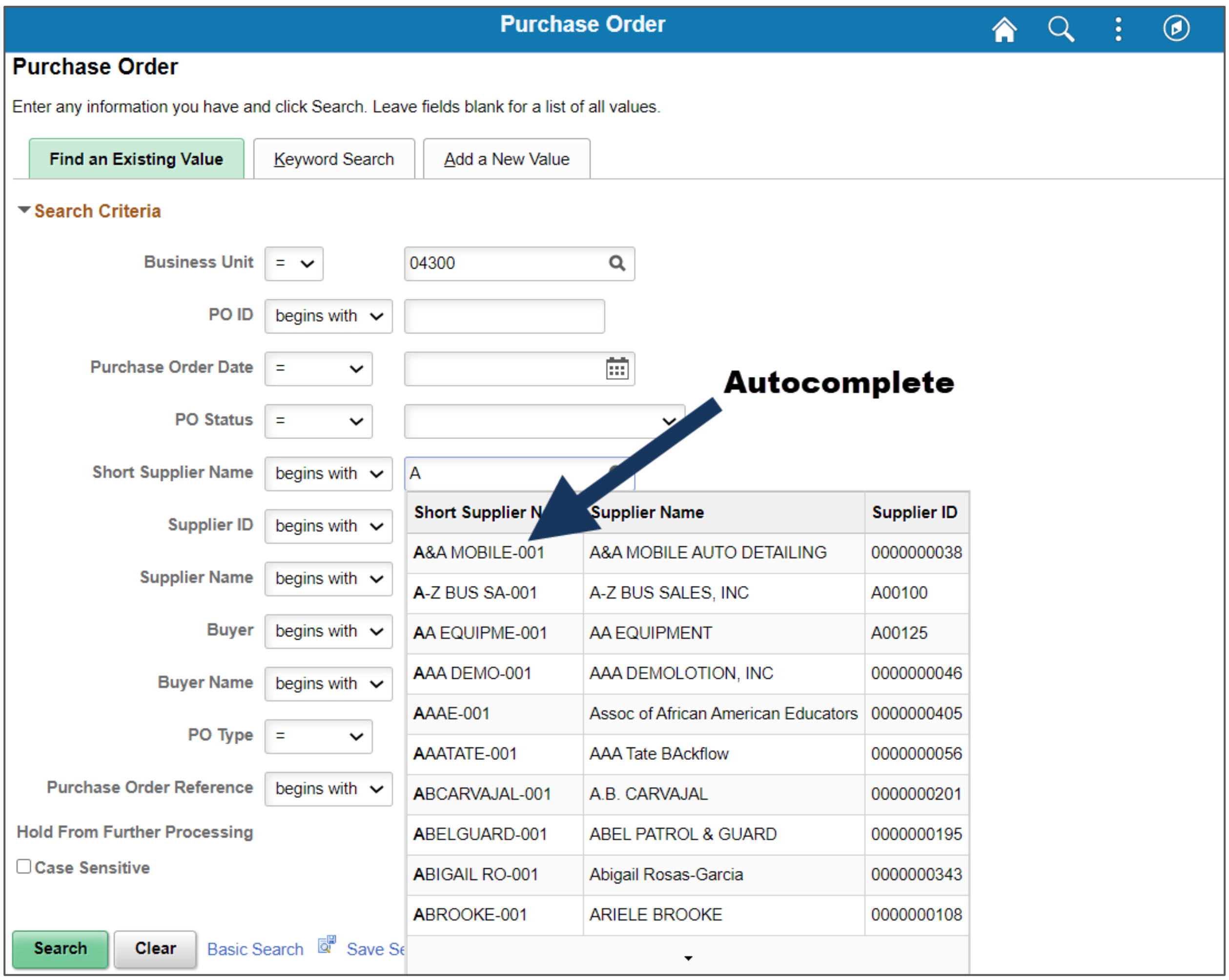


Part III: Personalizing PeopleSoft

Turn Autocomplete Off

Do you want to turn off Autocomplete? In PeopleSoft, the **Autocomplete** feature allows you to see suggestions as you're typing a value in a field. You can select one of values on the list to fill out the field or keep typing. In the example below, we typed "al" and a list of items that begins with "AL" appears. By default, Autocomplete option is set to Yes. If you prefer to type in all values manually and not have the floating suggestions appear, you can turn off Autocomplete using **My Preferences**.

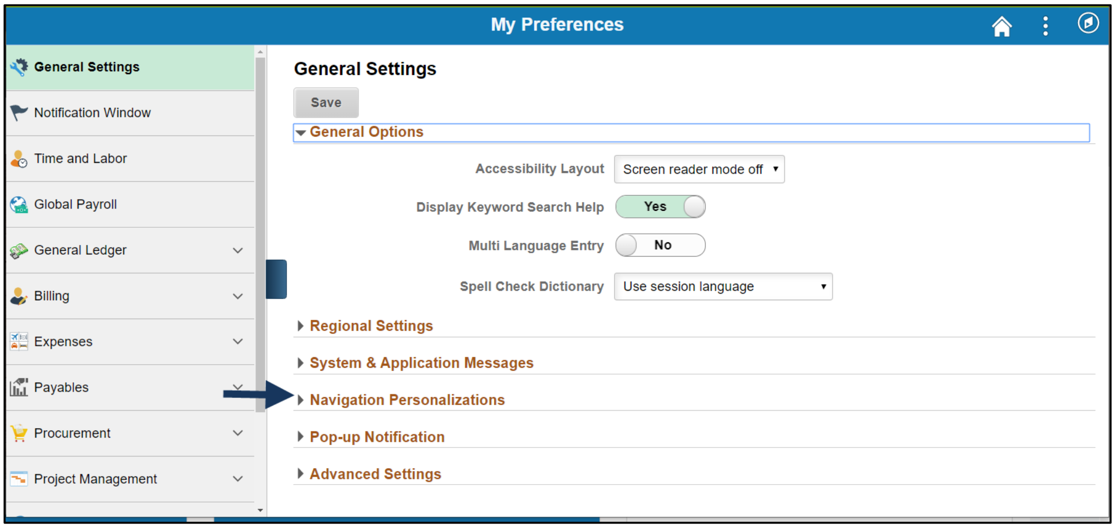
IMPORTANT! With Autocomplete off, the system will still let you know if the value you typed in the field is invalid. You will also still be able to click on the magnifying glass to expand the complete list of valid values and select from it.



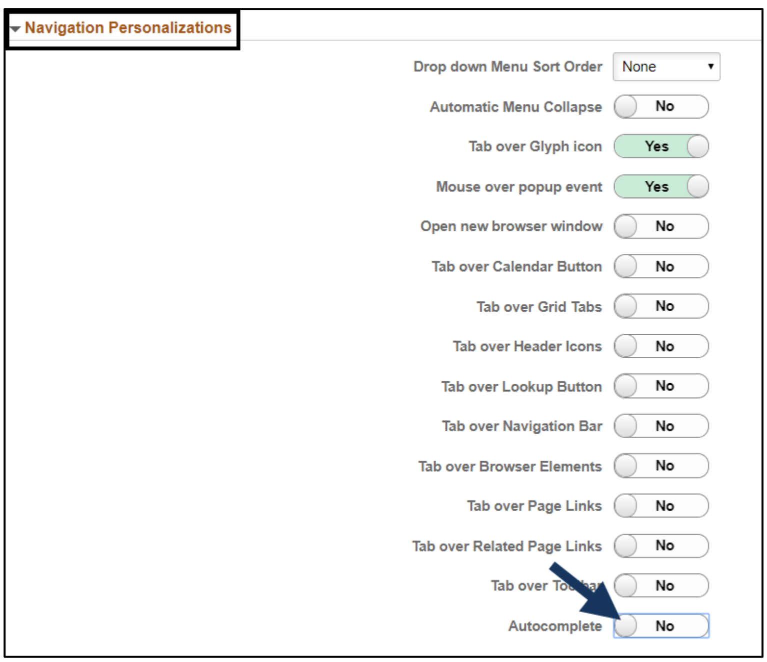
Directions:

1. Launch the desired PeopleSoft application, like Financials or HCM.
2. **Navigate to My Preferences screen:** NavBar > Menu > FSCM (or HCM) > My Preferences

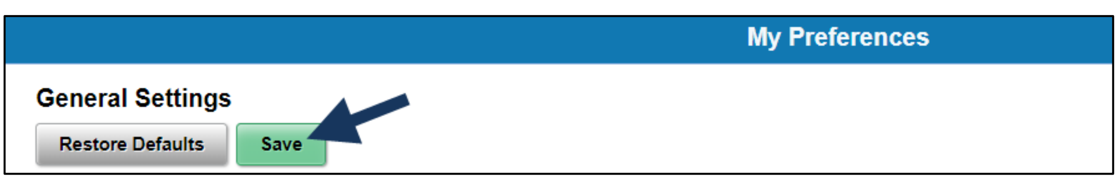
3. Click on **Navigation Personalizations dropdown.**



4. For the **Autocomplete** option (at the bottom of the list) select *No*.



5. Click **Save** (top right of screen). Look for an indication at the top of your screen that your personalizations have been saved.



6. Click **Home**.
7. If you don't see the change immediately, log out and log back in to the application.

NOTE: If you use Finance and HCM, you need to do this separately in each navigation.

Personalize Columns (Grids)

In certain areas of PeopleSoft, you will notice that the fields are arranged in a grid with columns. You can customize the way you enter data in these fields. To do this, you click the **Personalize** link located directly above a grid.

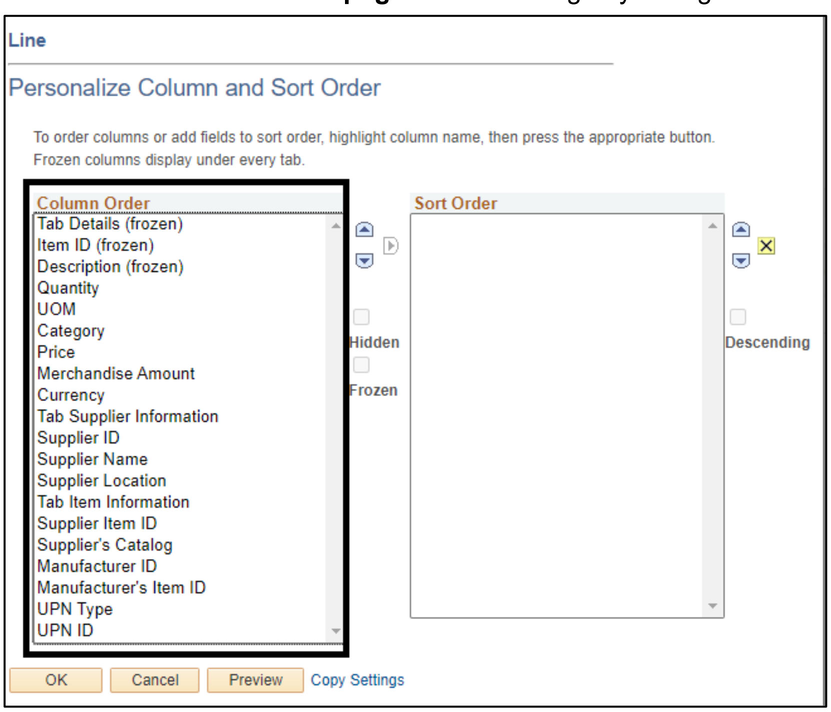
Before

Here is the **Express Item Entry** screen, used to enter a purchasing requisition.

Notice the following default settings:

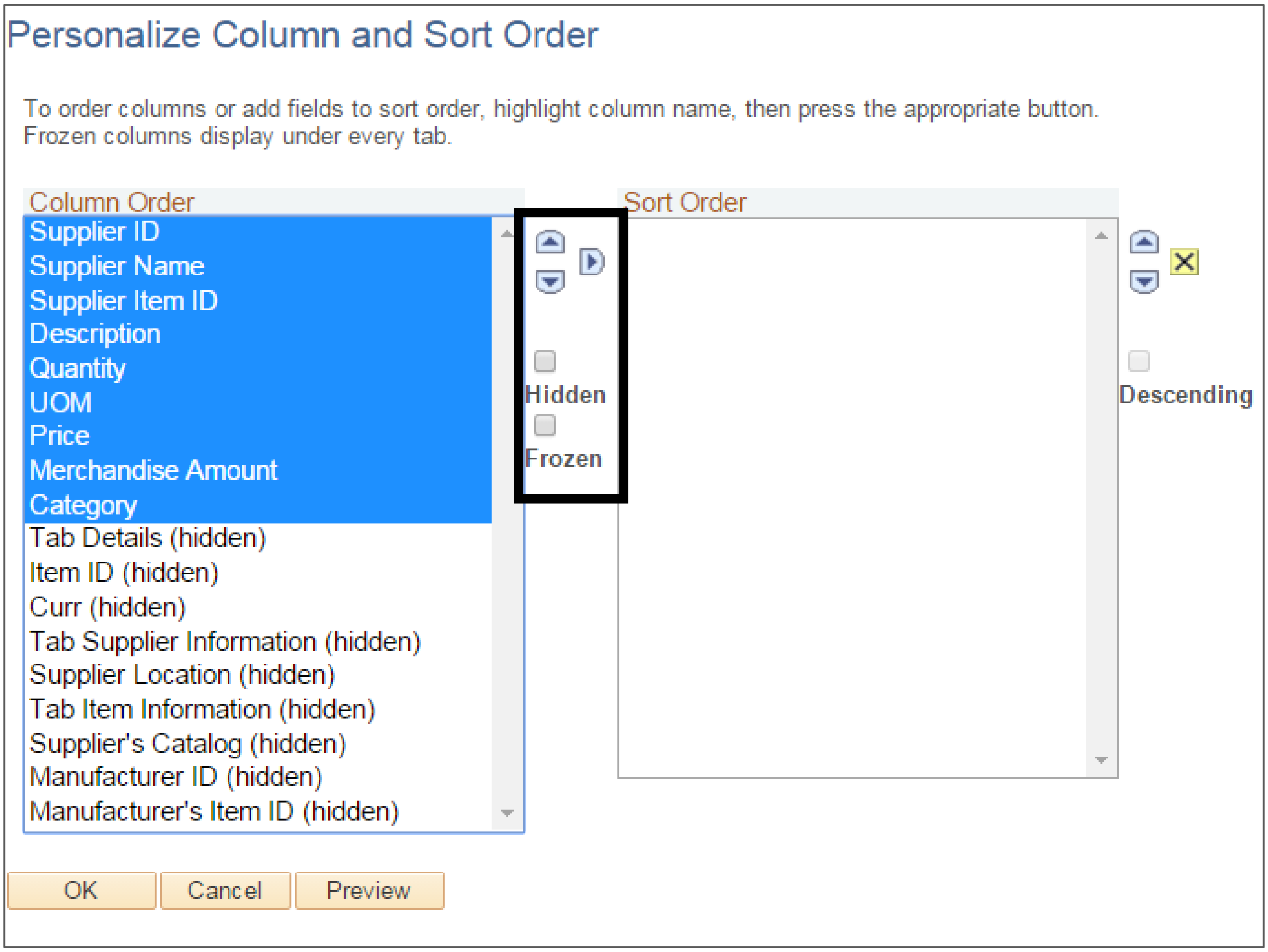
- There are three tabs: **Details**, **Supplier Information,** and **Item Information**.
- Each tab has fields where data can be entered. For example, on the Details tab, you can see **Item ID**, **Description**, **Quantity**, **UOM**, **Category**, **Price**, and **Merchandise Amount**.
- You have the option to click an icon to **expand all tabs** to have all fields appear on the screen at once – you may have to scroll to the right to see all fields.
- You can click **Personalize** (found at the top of any grid) to select exactly which fields in which order you want to see.

Here is the **Grid Customization page** before making any changes.



Directions to make changes:

1. Click **Personalize**. This is the link found directly above a grid.
2. When the **Personalize Column and Sort Order** window appears, click a field and move it up/down, hide it, or freeze it.



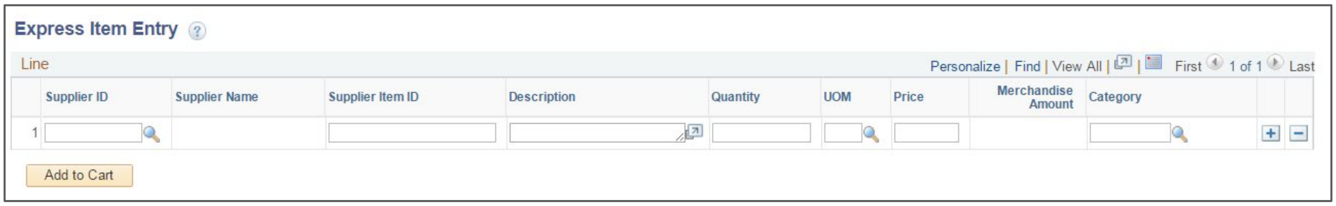
- Use the **up/down arrows** to change the order in which it appears.
- Click **Hidden** to hide the field.
- Click **Frozen** to "freeze" the field (similar to Freeze Panes in Excel).

  NOTE: You can Control-click or Shift-click fields to select some or all at once, then use the arrows, Hidden, and Frozen to make changes to multiple fields.

3. Click **Preview** if you want to see the changes before committing.
4. Click **OK**. The fields on this screen are now personalized for you and will stay this way when you use this screen.

After

Here is the grid on the **Express Item Entry** screen after it has personalized.



Notice the following personalizations:

- No tabs
- Only 9 fields are displayed and in a specified order: **Supplier ID**, **Supplier Name**, **Supplier Item ID**, **Description**, **Quantity**, **UOM**, **Price**, **Merchandise Amount**, and **Category**.
- Data entry can now be done without having to click the three tabs. The user can easily tab through the fields in the desired order.

Part IV: Additional Items

Clearing Your Cache

When you use PeopleSoft, you should periodically clear your cache to allow your browser to function more efficiently.

Directions: Find your browser in the grid below and follow the directions to clear your cache. If you don't see your specific version or browser, search your browser's Help menu for "clear cache." If you're unsure what browser version you're using, from the Help menu, select About [*browser name*]. In Internet Explorer and Firefox, if you don't see the menu bar, press Alt.

Chrome

- Click 3 dots in upper right of browser.
- Select **More Tools** > **Clear browsing data**
- Select the items to clear:
  Browsing history
  Clear download history
  Cookies and other site data
  Cached images and files
- At the top for **Time range, select All time.**
- Click **Clear data**

Firefox

- From hamburger menu (3 line), select **History, then Clear History.**
- From the **Time range to clear:** menu, select **Everything**.
- Under **History** check:
  Browsing and download history
  Active logins
  Form & search history
  Cookies
  Cached
- Click OK

Edge

- To view browsing history, select **Hub** in the upper right, then select **History**.
- Click the **Clear all history** hyperlink.
- Select:
  Browsing History
  Cookies and saved website data
  Cached images and files
  Download History
- Click **Clear Now**
- A message stating "All clear!" will appear
  Click back on webpage.

Safari

- From the **Safari** menu, select **Clear History**
- In pop up window, select **Clear all history**
- Click **Clear History**

Internet Explorer 8 and higher

- Click on **gear icon in** the upper right
- Select **Internet Options**
- On the **General tab**, **check the box next to Delete browsing history on exit.**
- **Click OK**

Opera

- From the **Opera** menu, select **Settings**, and then **select clear browsing data button.**
- Select the items you want to clear**: Browsing history, Download history, Cookies and other site data, Cached images and files**
- At the top for **Time range, select All time.**
- Click **Clear Data.**

Still experiencing odd behavior? Try a different browser. Or try opening a **New incognito window** (Chrome), **New private window** (Firefox), or **New session** (Internet Explorer).

Sandbox Practice Environment

Want to test out your newfound skills or need to try something before you enter it in Production? Use the PeopleSoft Sandbox (SDPX) environment. There is no undo button in PeopleSoft Production environment, so this is a great place to practice. Sandbox gets refreshed with Production data every 2 weeks (refer to calendar on PeopleSoft Support website for dates)

Note: You must be at one of your district sites to access Sandbox, just like you do for Production. There is no Secure Auth access for Sandbox.

Link to Sandbox: https://sdpx91.erp.sdcoe.net

- Username and password are the same as Production environment unless you have recently made a change.
- If you have trouble logging in, reach out to your district contact.

CAUTION! – Always double check that you are in the Sandbox environment before entering your data

- Check the URL: Starts with sdpx
- Portal page header says SDPX91-NonProd