

PeopleSoft

Navigation Guide

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PREPARED BY SDCOE PEOPLESFT SUPPORT

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Finance

1099 Processing

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Ind Contractor to be Reported screen: NavBar > Navigator > FSCM > Accounts Payable > Accounts Payable WorkCenter > Reports/Queries > Ind Contractor to be Reported

Match Exceptions screen: NavBar > Navigator > Accounts Payable > FSCM > Reports > Vouchers > Match Exceptions

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Customer Account Overview use: Account Overview screen: NavBar > Navigator > FSCM > Accounts Receivable > Customer Accounts > Customer Information > Account Overview

Customer Item History Report use: Item List screen: NavBar > Navigator > FSCM > Accounts Receivable > Customer Accounts > Item Information > Item List

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Billing & Express Deposits

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- Budgets Details screen:** NavBar > Navigator > FSCM > Commitment Control > Review > Budget Activities > Budgets Details
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Manage Control Budget Journal screen: NavBar > Navigator > FSCM > Commitment Control > Budget Journals > Manage Control Budget Journal.

Mark for Unposting screen: NavBar > Navigator > FSCM > Commitment Control > Post Control Budget Journals > Mark for Unposting

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SACS Extract File screen: NavBar > Navigator > FSCM > SDCOE Custom > Custom Extracts > SACS Extract File

Purchase Order screen: NavBar > Navigator > FSCM > Commitment Control > Review Budget Check Exceptions > Purchasing and Cost Management > Purchase Order

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Working Budget Comparison Rpt screen: NavBar > Navigator > FSCM > SDCOE Custom > Custom Reports > Working Budget Comparison Rpt

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Financial Asset Management

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- Asset Depreciation screen:** NavBar > Navigator > FSCM > Asset Management > Depreciation > Review Depreciation Info > Asset Depreciation
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- Asset Transfers screen:** NavBar > Navigator > FSCM > Asset Management > Financial Reports > Cost and Depreciation > Asset Transfers
- Basic Add screen:** NavBar > Navigator > FSCM > Asset Management > Asset Transactions > Owned Assets > Basic Add
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- Depreciation Activity screen:** NavBar > Navigator > FSCM > Asset Management > Financial Reports > Cost and Depreciation > Depreciation Activity
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- Load Assets Request screen:** NavBar > Navigator > FSCM > Accounts Payable > Batch Processes > Extracts and Loads > Load Assets Request
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- Net Book Value Table screen:** NavBar > Navigator > FSCM > Asset Management > Financial Reports > Load Reporting Tables > Net Book Value Table
- Query Viewer screen:** NavBar > Navigator > FSCM > Reporting Tools > Query > Query Viewer
- Regular Entry (Vouchers) screen:** NavBar > Navigator > FSCM > Accounts Payable > Vouchers > Add/Update > Regular Entry
- Retire/Reinstate Asset screen:** NavBar > Navigator > FSCM > Asset Management > Asset Transactions > Asset Disposal > Retire/Reinstate Asset
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- Create Counting Sheet** screen NavBar > Navigator > FSCM > Inventory > Inventory Counts > Prepare Counting Event > Create Counting Sheet
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- Define Business Unit Item** screen: NavBar > Navigator > FSCM > Items > Define Items and Attributes > Define Business Unit Item
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Inventory WorkCenter:

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Load Staged Items screen: NavBar > Navigator > FSCM > Inventory > Putaway Stock > Load Staged Items

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Material Picking Feedback screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Picking > Material Picking Feedback.

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PO Auto Sourcing screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Stage/Source Requests > PO Auto Sourcing.

PO Auto Sourcing screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Stage/Source Requests > PO Auto Sourcing

Process Monitor to access the PO in PDF screen: NavBar > Navigator > FSCM > PeopleTools > Process Scheduler > Process Monitor

Reconciliation Report screen: NavBar > Navigator > FSCM > Inventory > Inventory Counts > Reconcile Inventory Balances > Reconciliation Report

Report Manager screen: NavBar > Navigator > FSCM > Reporting Tools > Report Manager

Review Replenishment Requests screen: NavBar > Navigator > FSCM > Inventory > Replenish Inventory > Review Replenishment Requests.

Review Transaction History screen: NavBar > Navigator > FSCM > Inventory > Manage Inventory > Analyze Inventory > Review Transaction History.

RMA screen: NavBar > Navigator > FSCM > Inventory > Managed Returned Material > RMA.

Setup Item Replenishment screen: NavBar > Navigator > FSCM > Inventory > Replenish Inventory > Setup Item Replenishment

Shipping/Issues screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Shipping > Shipping/Issues.

Sourcing Workbench screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench.

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Stock Status screen: NavBar > Navigator > FSCM > Inventory > Manage Inventory > Reports > Stock Status.

Stockroom Feedback screen: NavBar > Navigator > FSCM > Inventory > Putaway Stock > Stockroom Feedback

Transfers screen: NavBar > Navigator > FSCM > Inventory > Manage Inventory > Transfers.

Update Counting Event screen: NavBar > Navigator > FSCM > Inventory > Inventory Counts > Perform Count > Update Counting Event

Update Stock Quantity screen: NavBar > Navigator > FSCM > Inventory > Inventory Counts > Reconcile Inventory Balances > Update Stock Quantity

Update Unreserved Orders screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Stock Requests > Update Unreserved Orders

Usage Desktop screen: NavBar > Navigator > FSCM > Inventory > Manage Inventory > Analyze Inventory > Usage Desktop.

Manage Approvals

Worklist screen NavBar > Navigator > FSCM > Worklist > Worklist or Worklist Details

Alternate User set up: NavBar > My System Profile .Alternate User

PO Rollover

Add/Update POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Add/Update POs page

Budget Check screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Check

Non-Qualified PO Listing screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Year End Processing > Non-Qualified PO Listing

Open Purchase Order Report screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Year End Processing > Open Purchase Order Report.

PO Rollover Activity Report screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Year End Processing > PO Rollover Activity Report

PO Rollover Workbench screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Year End Processing > PO Rollover Workbench

PO Roll View screen NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Year End Processing > PO Roll View

Purchase Orders screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Query Viewer screen: NavBar > Navigator > FSCM > Reporting Tools > Query > Query Viewer

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Request PO Rollover2 screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Year End Processing > Request PO Rollover2

Process Monitor and Report Manager (for Finance)

Process Monitor screen: NavBar > Navigator > FSCM > PeopleTools > Process Scheduler > Process Monitor

Report Manager screen: NavBar > Navigator > FSCM > Reporting Tools > Report Manager

Procure to Pay Process

Item Categories screen: NavBar > Navigator > FSCM > Items > Define Controls > Item Categories

Query Viewer: NavBar > Navigator > FSCM > Reporting Tools > Query > Query Viewer

Project Costing

Add Transactions screen: NavBar > Navigator > FSCM > Project Costing > Transaction Definitions > Add Transactions.

Create/Update Journal Entries screen: NavBar > Navigator > FSCM > General Ledger > Journals > Journal Entry > Create/Update Journal Entries.

Expenses screen: NavBar > Navigator > FSCM > Project Costing > Cost Collection > Expenses

Flexible Analysis screen: NavBar > Navigator > FSCM > Project Costing > Interactive Reports > Flexible Analysis.

Flexible Analysis User Default screen: NavBar > Navigator > FSCM > Project Costing > Flexible Analysis User Default

General Information screen: NavBar > Navigator > FSCM > Project Costing > Project Definitions > General Information

General Ledger screen: NavBar > Navigator > FSCM > Project Costing > Cost Collection > General Ledger

Payables screen: NavBar > Navigator > FSCM > Project Costing > Cost Collection > Payables

Project Activities screen: NavBar > Navigator > FSCM > Project Costing > Activity Definitions > Project Activities.

Purchasing screen: NavBar > Navigator > FSCM > Project Costing > Cost Collection > **Purchasing**

Purchasing Adjustments screen: NavBar > Navigator > FSCM > Project Costing > Cost Collection > Purchasing Adjustments

Regular Entry (Vouchers) screen: NavBar > Navigator > FSCM > Accounts Payable > Vouchers > Add/Update > Regular Entry

Retrieve Commitment Control screen: NavBar > Navigator > FSCM > Project Costing > Budgeting > Retrieve Commitment Control

Purchase Orders

Add/Update POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Add/Update POs

Add/Update Receipts screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Add/Update Receipts

Buyer's Workbench screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Buyer's Workbench

Buyer WorkCenter screen: NavBar > Navigator > FSCM > Purchasing > Buyer WorkCenter

Close Purchase Orders screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Reconcile POs > Close Purchase Orders

Close Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Reconcile Requisitions > Close Requisitions

Dispatch POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Dispatch POs.

ePro Manage Requisitions screen: NavBar > Navigator > FSCM > eProcurement > Manage Requisitions

Location screen: NavBar > Navigator > FSCM > Set Up Financials/Supply Chain > Common Definitions > Location > Location

PO Budget Check screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Budget Check

Print POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Review PO Information > Print POs.

Process Monitor screen: NavBar > Navigator > FSCM > PeopleTools > Process Scheduler > Process Monitor

Purchase Order > Reports screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Reports > _____ (enter report name)

Query Viewer for Finance screen: NavBar > Navigator > **FSCM** > Reporting Tools > Query > Query Viewer

Reopen POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Reconcile POs > Reopen POs

Reopen Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Reconcile Requisitions > Reopen Requisitions

Report Manager screen NavBar > Navigator > FSCM > Reporting Tools > Report Manager

Requester's Workbench screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Requester's Workbench

Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Review Requisitions Information > Requisitions

Req Budget Check screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Budget Check

Requisitions Selection Screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Stage/Source Requests > Requisition Selection

Review Change Orders screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Manage Change Orders > Review Change Orders

Review Receipt screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Review Receipt Information > Receipts

Review PO Information screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Ship To Locations screen: NavBar > Navigator > FSCM > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Ship To Locations.

Standard Comments screen: NavBar > Navigator > FSCM > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Standard Comments

Supplier screen: NavBar > Navigator > FSCM > Supplier > Supplier Information > Add/Update > Supplier

Voucher screen: NavBar > Navigator > FSCM > Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher

Query Manager and Query Viewer

Query Manager for Finance screen: NavBar > Navigator > **FSCM** > Reporting Tools > Query > Query Manager

Query Manager for HCM screen: NavBar > Navigator > **HCM** > Reporting Tools > Query > Query Manager

Query Viewer for Finance screen: NavBar > Navigator > **FSCM** > Reporting Tools > Query > Query Viewer

Query Viewer for HCM screen: NavBar > Navigator > **HCM** > Reporting Tools > Query > Query Viewer

Receiving Goods & Return to Vendor

Add/Update Receipts screen: NavBar > Navigator > FSCM> Purchasing > Receipts > Add/Update Receipts

Add/Update RTV screen: NavBar > Navigator > FSCM> Purchasing > Return To Vendor/Supplier > Add/Update RTV.

Buyer WorkCenter: NavBar > Navigator FSCM > Purchasing > Buyer WorkCenter

Dispatch RTV screen: NavBar > Navigator > FSCM > Purchasing > Return To Vendor/Supplier > Dispatch RTVs.

Planned Receipt screen: NavBar > Navigator > FSCM> Purchasing > Receipts > Reports > Planned Receipt

Print RTVs screen: NavBar > Navigator > FSCM > Purchasing > Return To Vendor/Supplier > Print RTVs.

Receipt Deliver screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Reports > Receipt Delivery

Reconcile RTVs screen: NavBar > Navigator > FSCM > Purchasing > Return To Vendor/Supplier > Reconcile RTVs.

Report Manager screen: NavBar > Navigator > FSCM > Reporting Tools > Report Manager.

Review Receipt Information screen: NavBar > Navigator > FSCM> Purchasing > Receipts > Review Receipt Information > Receipts.

Review RTVs screen: NavBar > Navigator > FSCM > Purchasing > Return To Vendor/Supplier > Review RTVs.

Requisitions – Core

Add/Update Receipts screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Add/Update Receipts

Add/Update Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Add/Update Requisitions

Budget Check screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Budget Check

Buyer WorkCenter: NavBar > Navigator FSCM > Purchasing > Buyer WorkCenter

Catalog screen: NavBar > Navigator > FSCM > eProcurement > Requisition > Catalog

Document Status screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Review Requisition Information > Document Status.

eProcurement > Requisition screen: NavBar > Navigator > FSCM > eProcurement > Requisition

ePro Manage Requisitions screen: NavBar > Navigator > FSCM > eProcurement > Manage Requisitions

Manage Requisition screen: NavBar > Navigator > FSCM > eProcurement > Manage Requisition

Query Viewer: NavBar > Navigator > FSCM > Reporting Tools > Query > Query Viewer

Receipts (review) screen NavBar > Navigator > FSCM > Purchasing > Receipts > Review Receipt Information > Receipts.

Receipts (Add/Update) screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Add/Update Receipts

Report Manager screen: to NavBar > Navigator > FSCM > Reporting Tools > Report Manager

Reports and Processes: NavBar > Navigator > FSCM > Purchasing > Requisitions > Reports > _____

Requisitions-Core (Add/Update) screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Add/Update Requisitions

Requisitions-ePro screen: NavBar > Navigator > FSCM > eProcurement > Requisition

Requisitions Inquiry screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Review Requisitions Information > Requisitions

Requester's Workbench screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Requester's Workbench

Review PO Information screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.

Voucher screen: NavBar > Navigator > FSCM > Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher.

Requisitions – eProcurement

Add/Update Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Add/Update Requisitions

Buyer WorkCenter: NavBar > Navigator FSCM > Purchasing > Buyer WorkCenter

Catalog screen: NavBar > Navigator > FSCM > eProcurement > Requisition > Catalog

eProcurement > Requisition screen: NavBar > Navigator > FSCM > eProcurement > Requisition

Manage Requisition screen: NavBar > Navigator > FSCM > eProcurement > Manage Requisition

Receipts screen NavBar > Navigator > FSCM > Purchasing > Receipts > Review Receipt Information > Receipts.

Reports and Processes screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Reports >

Review PO Information screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.

Review Requisitions Information screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Review Requisitions Information > Requisitions.

Voucher screen: NavBar > Navigator > FSCM > Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher.

Travel and Expense

Travel & Expenses WorkCenter: NavBar > Navigator > FSCM > Travel and Expenses > Travel & Expenses WorkCenter

Navigation to Approved Transactions (Modify) screen in Finance: NavBar > Navigator > FSCM > Travel and Expenses > Approve Transactions > Modify Approved Transactions

Navigation to Approve Expense Report Transactions screen in Finance: NavBar > Navigator > FSCM > Travel and Expenses > Approve Transactions > Approve Transactions

Navigation to Authorize Users screen in ESS: NavBar > **Navigator** > Self Service > Travel and Expenses > Authorize Users

Navigation to ER (Create/Modify) screen in ESS: NavBar > Navigator > Self Service > Expense Reports > Create/Modify

Navigation to ER (Create/Modify) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify

Navigation to ER (Delete) screen in ESS: NavBar > Navigator > Self Service > Expense Reports > Delete

Navigation to ER (Delete) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Expense Reports > Travel Authorizations > Delete

Navigation to ER (View) screen in ESS: NavBar > Navigator > Self Service > Expense Reports > View

Navigation to ER (View) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Expense Reports > View

Navigation to Delegate Entry Authority screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > User Preferences > Delegate Entry Authority

Navigation to Profile (Review/Edit) screen in ESS: NavBar > Navigator > Self Service > Travel and Expenses > Review/Edit Profile

Navigation to Profile (Review/Edit) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Review/Edit Profile

Navigation to TA (Cancel) screen in ESS: NavBar > Navigator > Self Service > Travel Authorization > Cancel

Navigation to TA (Cancel) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Travel Authorizations > Cancel

Navigation to TA (Create/Modify) screen in ESS: NavBar > **Navigator** > Self Service > Travel Authorization > Create/Modify

Navigation to TA (Create/Modify) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify

Navigation to TA (Delete) screen in ESS: NavBar > Navigator > Self Service > Travel Authorization > Delete

Navigation to TA(Delete) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Travel Authorizations > Delete

Navigation to TA (View) screen in ESS: NavBar > **Navigator** > Self Service > Travel Authorization > View

Navigation to TA (View) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > Travel Authorizations > View

Navigation to Template to Approve TA (Create/Update) screen in ESS: NavBar > Navigator > Self Service > Travel and Expenses > Create/Update User Template

Navigation to User Template to Approve TA (Create/Update) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > User Preferences > Create/Update User Template

Navigation to User Template (Create/Update) screen in ESS: NavBar > Navigator > Self Service > Travel and Expenses > Create/Update User Template

Navigation to User Template (Create/Update) screen in Finance: NavBar > Navigator > FSCM > Employee Self-Service > Travel and Expenses > User Preferences > Create/Update User Template

Year End Finance (YEFIN)

- Accounts Payable WorkCenter screen:** NavBar > Navigator > FSCM > Accounts Payable > Accounts Payable WorkCenter
- Budget Details screen** NavBar > Navigator > FSCM > Commitment Control > Review Budget Activities > Budget Details
- Budget Journals screen:** NavBar > Navigator > FSCM > Commitment Control > Budget Journals > Enter Budget Journals
- Budget Transfer screen:** NavBar > Navigator > FSCM > Commitment Control > Budget Journals > Enter Budget Transfer
- Budgets Overview screen:** NavBar > Navigator > FSCM > Commitment Control > Review Budget Activities > Budgets Overview
- Budget Status Report screen:** NavBar > Navigator > FSCM > SDCOE Custom Reports > Budget Status Report
- ChartField Values screen:** NavBar > Navigator > FSCM > Set up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values
- Create Accounting Entries screen:** NavBar > Navigator > FSCM > Accounts Receivable > Payments > Direct Journal Payments > Create Accounting Entries
- Create/Update Journal Entries screen:** NavBar > Navigator > FSCM > General Ledger > Journals > Journal Entry > Create/Update Journal Entries
- Delete Vouchers screen:** NavBar > Navigator > FSCM > Accounts Payable > Vouchers > Add/Update > Delete Vouchers
- Enter Budget Journals screen:** NavBar > Navigator > FSCM > Commitment Control > Budget Journals > Enter Budget Journals
- Enter Budget Transfer screen:** NavBar > Navigator > FSCM > Commitment Control > Budget Journals > Enter Budget Transfer
- Generate Journals screen:** NavBar > Navigator > FSCM > General Ledger > Journals > Subsystem Journal > Generate Journals
- Ledger screen:** NavBar > Navigator > FSCM > General Ledger > Review Financial Information > Ledger
- Mass Delete Budget Journals screen:** NavBar > Navigator > FSCM > Commitment Control > Budget Journals > Mass Delete Budget Journals
- Match Workbench screen:** NavBar > Navigator > FSCM > Accounts Payable > Review Accounts Payable Info > Vouchers > Match Workbench
- Modify Accounting Entries screen:** NavBar > Navigator > FSCM > Accounts Receivable > Payments > Direct Journal Payments > Modify Accounting Entries
- Query Manager for Finance screen:** NavBar > Navigator > **FSCM** > Reporting Tools > Query > Query Manager
- Regular Deposit screen:** NavBar > Navigator > FSCM > Accounts Receivable > Payments > Online Payments > Regular Deposit
- Regular Entry (Vouchers) screen:** NavBar > Navigator > FSCM > Accounts Payable > Vouchers > Add/Update > Regular Entry

Review Combination screen: Data NavBar > Navigator > FSCM > Set up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Review Combination Data

Revised Budget Summary Report screen: NavBar > Navigator > FSCM > SDCOE Custom > Custom Reports > Revised Budget Summary Report

Supplier screen: NavBar > Navigator > FSCM > Suppliers > Supplier Information > Add/Update > Supplier

Year End Purchasing & Inventory (YEPUR, YEIN)

Add/Update POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Add/Update POs

Add/Update Receipts screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Add/Update Receipts

Add/Update Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Add/Update Requisitions

Buyer's Workbench screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Buyer's Workbench

Cancel/Hold Stock Requests screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Stock Requests > Cancel/Hold Stock Requests

Create Replenishment Requests screen: NavBar > Navigator > FSCM > Inventory > Replenish Inventory > Create Replenishment Requests

Correct Staged Errors screen: NavBar > Navigator > FSCM > Inventory > Putaway Stock > Correct Staged Errors

Dispatch POs screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Dispatch POs

Fulfillment Status screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Review Fulfillment Information > Fulfillment Status

InterUnit and RMA Receiving screen: NavBar > Navigator > FSCM > Inventory > Putaway Stock > InterUnit and RMA Receiving

Load Requisitions screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Load Requisitions

Load Staged Items screen: NavBar > Navigator > FSCM > Inventory > Putaway Stock > Load Staged Items

Manage Requisitions screen: NavBar > Navigator > FSCM > eProcurement > Manage Requisitions

Manage Replenishment Requests screen: NavBar > Navigator > FSCM > Inventory > Replenish Inventory > Manage Replenishment Requests

Material Picking Feedback screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Picking > Material Picking Feedback

Order Release Request screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Picking > Order Release Request

Packing Slip screen: NavBar > Navigator > FSCM > Inventory > Fulfill Stock Orders > Shipping Reports > Packing Slip

POs (Add/Update) screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Add/Update POs

PO Auto Sourcing screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Stage/Source Requests > PO Auto Sourcing

Purchase Orders screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Query Viewer screen: NavBar > Navigator > FSCM > Reporting Tools > Query > Query Viewer

Receipts (Add/Update) screen: NavBar > Navigator > FSCM > Purchasing > Receipts > Add/Update Receipts

Regular Entry (AP) screen: NavBar > Navigator > FSCM > Accounts Payable > Accounts Payable WorkCenter > Regular Entry

Requester's Workbench screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Requester's Workbench

Requisitions (Add/Update) screen: NavBar > Navigator > FSCM > Purchasing > Requisitions > Add/Update Requisitions

Review Replenishment Requests screen: NavBar > Navigator > FSCM > Inventory > Replenish Inventory > Review Replenishment Requests

RMA screen: NavBar > Navigator > FSCM > Inventory > Managed Returned Material > RMA

RMA Report screen: NavBar > Navigator > FSCM > Inventory > Manage Returned Material > RMA Report

Sourcing Workbench screen: NavBar > Navigator > FSCM > Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench

Stockroom Feedback screen: NavBar > Navigator > FSCM > Inventory > Putaway Stock > Stockroom Feedback

HCM

Absence Management

Absences (Adjust Balances) screen: NavBar Navigator > HCM > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences.

Absence Balances screen: NavBar Navigator > HCM > Manager Self Service > Time Management > View Time > Absence Balances

Absence Event screen: NavBar Navigator > HCM > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

Absence Request History screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > View Time > Absence Request History.

Absence Request (Approve Time and Exceptions) screen: NavBar: HCM > Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests.

Absence Request (Time Management) screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Report Time > Absence Request

Query Viewer screen: NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer

Results by Calendar screen: NavBar > Navigator > HCM > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar

Results by Calendar Group screen: NavBar > Navigator > HCM > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar Group.

Time and Labor WorkCenter: NavBar > Navigator > HCM > Manager Self Service > Time Management > Time and Labor WorkCenter

Timesheet screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Report Time > Timesheet

Benefits Administration

Arrears screen: NavBar > Navigator > HCM > Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Arrears

Benefit Rates screen: NavBar > Navigator > HCM > Set Up HCM > Product Related > Base Benefits > Rates and Rules > Benefit Rates

Create General Deductions screen: NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

Current Benefits Summary screen: NavBar > Navigator > HCM > Benefits > Review Employee Benefits > Current Benefits Summary

Deductions in Arrears screen: NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Deductions in Arrears

Deduction Register Report screen: NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Deduction Register Report

Disability Benefits screen: NavBar > Navigator > HCM > Benefits > Enroll in Benefits > Disability Benefits

Employee Contribution Report: NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Employer Contribution Report

Employee Event Details screen: NavBar > Navigator > HCM > Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail

Employee Process Status Rpt screen: NavBar > Navigator > HCM > Benefits > Manage Automated Enrollment > Investigate Exceptions > Employee Process Status Rpt

Health Benefits screen: NavBar > Navigator > HCM > Benefits > Enroll in Benefits > Health Benefits (Use this for Medical, Dental and Vision Plans)

Job Data screen: NavBar > Navigator > HCM > Workforce Administration > Job Information > Job Data.

Life and AD/D Benefits screen: NavBar > Navigator > HCM > Benefits > Enroll in Benefits > Life and AD/D Benefits

On-Demand Event Maintenance screen: NavBar > Navigator > HCM > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

Override Deductions (Employee) screen: NavBar > Navigator > HCM > SDCOE Custom > Payroll > Processes > Override Deductions (Employee)

Payline screen: NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Update Paysheets > By Payline

Query Viewer screen: NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer

Review BAS Activity screen: NavBar > Navigator > HCM > Benefits > Manage Automated Enrollment > Events > Review BAS Activity

Review Dep/Ben Summary screen: NavBar > Navigator > HCM > Benefits > Employee/Dependent Information > Review Dep/Ben Summary

Savings Plan screen: NavBar > Navigator > HCM > Benefits > Enroll in Benefits > Savings Plans

Simple Benefits screen: NavBar > Navigator > HCM > Benefits > Enroll in Benefits > Simple Benefits

Vendor Remittance Report screen: NavBar > Navigator > HCM > SDCOE Custom > Benefits > Vendor
Remittance Report

Correct History

- Additional Pay screen:** NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Create Additional Pay
- Combination Code Table screen:** NavBar > Navigator > HCM > > Set Up HCM > Product Related > Commitment Accounting > Budget Information > Combination Code Table
- Department Budget Table USA screen:** NavBar > Navigator > HCM > Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA
- Employee Tax Data screen:** NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data
- General Deductions screen:** NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions
- Health Card screen:** NavBar > Navigator > HCM > Workforce Monitoring > Health and Safety > Record Medical Exam Results > Health Card
- On-Demand Event Maintenance screen:** NavBar > Navigator > HCM > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance
- Personal Information screen:** NavBar > Navigator > HCM > Workforce Administration > Personal Information > Personal Information
- Query Viewer screen:** NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer Save *M_PERSON_SEARCH* as a favorite on the Query page.
- Position Info (Add/Update) screen:** NavBar > Navigator > HCM > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
- Maintain Time Reporter Data screen:** NavBar > Navigator > HCM > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data
- Work Schedule screen:** NavBar > Navigator > HCM > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

COVID-19 Vaccination and Testing Tracking

Health Card screen: NavBar > HCM > Workforce Monitoring > Health and Safety > Record Medical Exam Results > Health Card

COVID Mass Update Validation screen: NavBar > Navigator > HCM > SDCOE CUSTOM > Human Resources > COVID Mass Update Validation

Query Viewer screen: NavBar > Navigator > FSCM > Reporting Tools > Query > Query Viewer

Department Budget Table (DBT)

Position Info screen: NavBar > Navigator > HCM> Organizational Development >Position Management > Maintain Positions/Budgets > Add/Update Position Info

DBT screen: NavBar > Navigator > HCM> Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

Human Resources

Add a Person screen: NavBar > Navigator > HCM > Workforce Administration > Personal Information > Add a Person

Additional Names screen: NavBar > Navigator > HCM > Workforce Administration > Personal Information > Biographical > Additional Names

Define Salary Grades screen: NavBar > Navigator > HCM > Compensation > Base Compensation > Maintain Plans > Define Salary Grades

Define Salary Plan screen: NavBar > Navigator > HCM > Compensation > Base Compensation > Maintain Plans > Define Salary Plan

Emergency Contact screen: NavBar > Navigator > HCM > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact

Employment Instance screen: NavBar > Navigator > HCM > Workforce Administration > Personal Information > Organizational Relationships > Add Employment Instance

Health Card screen: NavBar > Navigator > HCM > Workforce Monitoring > Health and Safety > Record Medical Exam Results > Health Card

HR WorkCenter screen: NavBar > Navigator > HCM > Workforce Administration > HR WorkCenter

Job Data screen: NavBar > Navigator > HCM > Workforce Administration > Job Information > Job Data

Pay Components area screen: NavBar > Navigator > HCM > Workforce Administration > Job Information > Job Data > Compensation tab > Pay Components area

Personal Information screen: NavBar > Navigator > HCM > Workforce Administration > Personal Information > Personal Information

Position History. screen: NavBar > Navigator > HCM > Organizational Development > Position Management > Review Position/Budget Info > Position History.

Position Info (Add/Update) screen: NavBar > Navigator > HCM > Organizational Development > Position Management > Maintain Positions/ Budgets > Add/Update Position Info

Position Summary screen: NavBar > Navigator > HCM > Organizational Development > Position Management > Review Position/Budget Info > Position Summary

Query Viewer screen: NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer

Vacant Budgeted Positions screen: NavBar > Navigator > HCM > Organizational Development > Position Management > Review Position/Budget Info > Vacant Budgeted Positions

Work Schedule (Assign) screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

PAF

PAF Request screen: NavBar > Navigator > HCM > SDCOE Custom> Human Resource > PAF Request.

PAF Approval screen: NavBar > Navigator > HCM > SDCOE Custom> SDCOE Custom > Human Resources
> PAF Approval

Query Viewer for HCM screen: NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer

Payroll

- Create Additional Pay screen:** NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Create Additional Pay
- Check Register screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Produce Checks > Check Register
- Create General Deductions screen:** NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions
- Deductions Not Taken screen:** NavBar > **Navigator** > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Deduction Not Taken
- Deduction Register screen:** NavBar **Navigator** > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Deduction Register
- Employer Benefits Contributions screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Employer Benefit Contributions
- Job Data screen:** NavBar > Navigator > HCM > Workforce Administration > Job Information > Job Data
- Multiple Worksite screen:** NavBar > Navigator > HCM > Payroll for North America > U.S. Quarterly Processing > Quarterly Reports > Multiple Worksite
- Other Earning Register screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Other Earnings Register
- Override Additional Pay (EmplID) screen:** NavBar > Navigator > HCM > SDCOE Custom > Payroll > Processes > Override Addl Pay (EmplID)
- Override Deductions (Employee) screen:** NavBar > Navigator > HCM > SDCOE Custom > Payroll > Processes > Override Deductions (Employee)
- Payline screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Update Paysheets > By Payline
- Payroll Register screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Pay Period Reports > Payroll Register
- Payroll Errors WorkCenter:**
- Payroll WorkCenter USA:** NavBar > Navigator > HCM > Payroll for North America > Payroll WorkCenter USA
- Paysheet screen:** NavBar > **Navigator** > HCM > Payroll for North America > Payroll Processing USA > Update Paysheets > By Paysheet
- Query Viewer screen:** NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer
- Review Garnishments screen:** NavBar > **Navigator** > HCM > Payroll for North America > Employee Pay Data USA > Deductions > Review Garnishments
- Request Direct Deposits screen:** NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Request Direct Deposits
- Review Paycheck screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck
- Review Self-Service Paycheck screen:** NavBar > Navigator > HCM > Payroll for North America > Payroll Processing > Produce Payroll > Review Self Service Paycheck

Update Employee Tax Data screen: NavBar > Navigator > HCM > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data

Process Monitor and Report Manager (for HCM)

Process Monitor screen: NavBar > Navigator > HCM > PeopleTools > Process Scheduler > Process Monitor

Report Manager screen: NavBar > Navigator > HCM > Reporting Tools > Report Manager

Time & Labor

Approve Time and Exceptions screen > Reported Time screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time

Assign Work Schedule screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

Compensatory Time screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > View Time > Compensatory Time

Employee Search Options screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Employee Search Options

Exceptions screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Approve Time and Exceptions > Exceptions

Job Data screen: NavBar > Navigator > HCM > Workforce Administration > Job Information > Job Data

Payable Time Detail screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > View Time > Payable Time Detail

Payable Time Summary screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > View Time > Payable Time Summary

Query Viewer screen: NavBar > Navigator > HCM > Reporting Tools > Query > Query Viewer

Rapid Time screen: NavBar > Navigator > Menu > Time and Labor > Report Time > Rapid Time

Reported Time screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time

Reported Time Audit screen: NavBar > Navigator > HCM > Time and Labor > View Time > Reported Time Audit

Reports screen: NavBar > Navigator > HCM > Time and Labor > Reports

Time and Labor WorkCenter: NavBar > Navigator > HCM > Manager Self Service > Time Management > Time and Labor WorkCenter

Time Reporter Status screen: NavBar > Navigator > HCM > Time and Labor > View Time > Time Reporter Status

Timesheet screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Report Time > Timesheet

Timesheet Summary screen: NavBar > Navigator > HCM > Manager Self Service > Time Management > Report Time > Timesheet

Unprocessed Payable Time screen: NavBar > Navigator > HCM > Time and Labor > View Time > Unprocessed Payable Time

Unprocessed Reported Time screen: NavBar > Navigator > HCM > Time and Labor > View Time > Unprocessed Reported Time

Other

Introduction to PeopleSoft

Navigator: NavBar > Navigator

My Favorites screen: NavBar > My Favorites

My Preferences screen: NavBar > Navigator > FSCM (or HCM) > My Preferences

My Profile screen: Nav Bar > My Profile

My Services screen: Nav Bar > My Services

Query Viewer screen: NavBar > Navigator > **select either FSCM or HCM** > Reporting Tools > Query > Query Viewer

Recent Places screen: Nav Bar > Recent Places

Employee Self-Service (ESS)

Navigator: NavBar > Navigator

My Favorites screen: NavBar > My Favorites

My Preferences screen: NavBar > Navigator > FSCM (or HCM) > My Preferences

My Profile screen: Nav Bar > My Profile

My Services screen: Nav Bar > My Services

Recent Places screen: Nav Bar > Recent Places

Tile Navigations:

- Payroll and Compensation
 - View Paychecks
 - View Paycheck – pdf
 - Direct Deposit
 - Split Compensation
 - Compensation History
 - Employee Withholding Forms
 - Vies W-2/W-2c Forms
- Personal Information
 - Addresses
 - Contact Details
 - Marital Status
 - Name
 - Ethnic Groups
 - Emergency Contacts
 - Additional Information
 - Disability
 - Veteran Status
 - Form I-9
- Health and Benefits
 - My Health Card
 - Health Care Summary
 - Health Care Dependent Summary
 - Savings Summary
 - Savings Contribution Summary
 - Savings Beneficiary Summary
 - CalPERS
 - CalSTRS
- Approvals
- Company Directory

These items not available for all districts

- Expense Reports Approvals
- Recruiting Tasks
- Time and Absence
 - Absence Request
 - Absence Request History
 - Absence Balances
- Travel and Expense
 - Travel and Expense WorkCenter
 - User Setup
 - Travel Authorization
 - Expense Reports