

SCREENS AND PROCESSES FOR BUSINESS MANAGERS

<u>Note</u>: This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.

If you have not used one of the new "Mini-Manuals" you may wish to consult the document "Getting the Most Out of Mini-Manuals" prior to using this document.

If you have questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail <u>psguides@uvm.edu</u>.

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(Click on topic headings to automatically jump to a specific section.

Use Ctrl+Home to come back to the Table of Contents)

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Background

Workforce Administration, Workforce Development and Organizational Development are three important modules within PeopleSoft. A large variety of data ranging from personal and job information to budget specifications and compensation can be viewed here. Remember that the type and amount of information available to a user is determined by the user's particular security permissions. Access to specific jobs and employees may also be limited due to the practice of cost-sharing. The user that is based in the position's *home department* has access to the records. This Mini-Manual has been designed with the typical user in mind.

The three modules covered in the Mini-Manual are largely used for referencing or gathering very specific information. For that reason we have added a <u>Terminology Index</u> on the last page that can be used to identify on which PeopleSoft screens the data is available. Simply click on the term to b[T)-8(e)-3t Attacthat can bwithin Peophe tye(h)6(a)-3s-3@05r1 0 0 1 549.82 s(t)6



3. The search screen will display:



7. To see all historical records for the employee, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Contact Information Screen

8. Click the **Contact Information** tab to display the following:

<u>B</u> iograp	hical Deta	ails Conta	ict Information	<u>R</u> egional					_	
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nation Re								 Biographical Det 	<u>ails Contact</u>	i. Info

NAV: Workforce Administration>Personal Information>Biographical>Modify a Person>Contact Information





Regional Screen

9. Click the **Regional** tab to display the following:

Rally Cat Person ID: 0101791 USA Ethnic Group Regulatory Region: USA United States Ethnic Group: Primary	
Ethnic Group Find View All First I of 1 D Last Regulatory Region: USA United States	

NAV: Workforce Administration>Personal Information>Biographical>Modify a Person>Regional

10. To return to the Search Results, click the Return to Search button.

Job Information

Note: Users may not have access to view the *Earnings Distribution* or *Benefits Program Participation* links at the bottom of the screens in the Job Information section.

- 1. Log in to PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal/).
- 2. Navigation: Workforce Administration > Job Information > Job Data



3. The search screen will display:

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7. To see all historical records for the employee, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Job Information Screen

Work Location Job Informat	tion Job Labor Pavroli Salary Plan	Compensation					
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ormation <u>Job Labor</u> <u>Payroll</u> <u>Sal</u>	ary Plan Compensation					Work Location	<u>n</u> Job Info

8. Click the Job Information tab to display the following:

NAV: Workforce Administration>Job Information>Job Data>Job Information



Job Labor Screen

9. Click the Job Labor tab to display the following:

Rally Cat						
	EMP	ID: 0		npl Rcd #: 0		
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Secondary Job		Effective Date:	09/29/2011	Effective Sequence:	0 🖵 Jo	b Indicato
Current		Action / Reason:	: Rehire-		Rehire	
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	Employee Category:			Stop	Nage Progression	
	Employee Subcategory:			Pay U	nion Fee	
	Employee Subcategory 2:			Positi	on Management F	ecord
	and the second second second				Linne weight	
Works Council ID:						
Labor Facility ID:		Labor Facility	/ Entry Date:			
Exempt from Layoff: Layoff Exe	mption Reason:					
Assigned	Seniority Dates		Customizo Find V	iaw All LA L III First R.	1 - 15 A D 1 - 26 A	
eniority Date Override Override Re	ason		Seniority Date	Contro	ol Value	Labor
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Work-Location-Llob	Information I Toby abort Payroll I Salary	Plan I Compensation				

NAV: Workforce Administration>Job Information>Job Data>Job Labor



Payroll Screen

10. Click the Payroll tab to display the following:

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1 Effective Sequence: Ref	0 🔲 Job Indicator: Secondary J hire		Effective Date: Action / Reason:	09/29 Rehi
	egonomi <u>i i i i i i i i i i i i i i i i i i </u>		 Daurall Quatam	Tir
Elweskiy Rayroll Heuriy Wermont	Holiday Schedule: Uwidin FICA Status: Exempt	UMAII	Pay Group: Employee Type: Tax Location Code: GL Pay Type:	BWV1 H UWM
	Edit ChartFields		Combination Code:	

NAV: Workforce Administration>Job Information>Job Data>Payroll

Salary Plan Screen

11. Click the Salary Plan tab to display the following:

Work Location Y .lob Information Y .lob Labor Y Pavroll Y Sala	arv Plan Commensation	······	<u></u>
91. Empl Rod # 10	Rally Cat	EMP	(D) 0.10.17
That Shat Classic Disease	salanz Rian		
equence: 0 U Job Indicator: Secondary Job Rehire Current	t	Effective Date: 09/2 Action / Reason: Reh	9/2011 Effective So ire
		Salary Administration Min	
Employment Data Earnings Distribution Benefits Proc	gram Participation		Job Data

NAV: Workforce Administration>Job Information>Job Data>Salary Plan





Employment Data Screen

13. Click the **Employment Data** tab to display the following:

Employment Information						
Rally Cat	EMP		ID:	0101791	Empl Rcd #:	0
Organizational Instance						
Organizational Instance Rcd:	0	Original Start Date:	05	/18/2010	Override	
Last Start Date:	09/29/2011	First Start Date:	05	/18/2010		
Termination Date:		Y	ears Months	Days		
and the second s						· · ·
Instance Recor						
Läst Assignment S		9/29/2011	FI	rst Assignment	Start:: 05/18/20	010-
Accimment End Da	te.					
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L D. B. Branner, Mr. 1995		mana and	<i>"</i> 677	······································	e e e	

NAV: Workforce Administration>Job Information>Job Data>Employment Data

14. To return to the Search Results, click the Return to Search button.





Description Screen

6. The **Description** tab will appear and the position's first record will display:

	Specific Information Budget and Incumbents				
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sition Number					Po
adcount Statu	s: Filled	Current Head Co	ount: 1 out of 1		He
ective Date:	07/01/2010	Status:	Active		Eff
ason:	UPD Position Data Update	Action Date:	09/01/2010		Re
sition Status:	Approved Status Date: 07/01/2005	5-	Key Position		Po
de lindicermeeticen					
siness Unit:	01 Genl. Institutional				Bu
b Code:	3031 Administrative Professional	Manager Level:	Non-Manager		Jo
g/Temp:	Regular	Full/Part Time:	Full-Time		Re
gular Shift:	1	Union Code:	NU Non Union		Re
le:	Administrative Professional	Short Title:		- President - Line - Constanting	
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NAV: Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info>Description

7. To see all historical records, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Updated 5/2/2014

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Budget and Incumbents Screen

9. Click the Budget and Incumbents tab to display the following:

	ະຫາດມາສາດກຸ່ມ ມີບາ	ngét and mournserie	* <u> </u>		
Position Number: Headcount Status:	Filled		Curre	ent Head Count: 1 out of	1
Current Budget	T meu		Curre		
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	Empl ID	Empl Rcd# Full/Pa	rt <u>Std</u> Hrs/Wk	Name	Job Data
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	Des	cription Specific Inf	ormation (Bu)	dget and incumbents	

NAV: Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info>Budget and Incumbents

10. To return to the **Search Results**, click the Return to Search button.

Review Position/Budget Info

- 1. Log in to PeopleSoft through the Human Resources Login (<u>www.uvm.edu/~erp/portal/</u>).
- 2. Navigation: Organizational Development > Position Management > Review Position/Budget Info > Position Summary
- 3. The search screen will display:







4. Enter the se81(.41 27.624 Tm)]TJ56994 TJETBT1 0 0 1 142.2[

ØØd



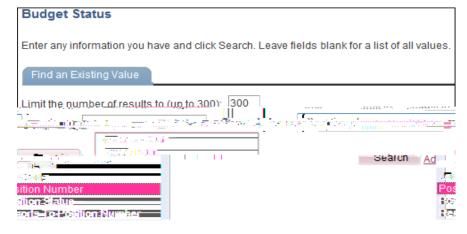
5. The **Position History** tab will appear and the position record will display:

Position History				
Rosition Data Position Number:	Administrative Professional		-	Current F
	n _{an G} ra <u>daSten</u>	Oomponents	an a	ionsation Bate .
Position End Date:				F
Kit Réason:				

NAV: Organizational Development>Position Management>Review Position/Budget Info>Position History

Budget Status Screen

- 1. Return to Review Position/Budget Info screen and click the Budget Status link.
- **2.** The search screen will display:



- 3. Enter the search criteria and click the **Search** button.
- 4. Search Results will display. Select the position to be viewed.



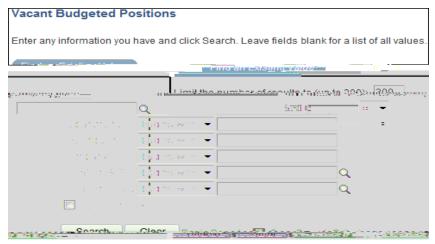
5.	The Position Budget Status tab	will appear and the position	n record will display:
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	ount Variance:	66,270.00		Head Count Variance:	1	FTE Variance:	1.0		
Cui	Amount Variance: 66,270.00								
	rrent Budget Ame	ວມຫົວ		Current Budget Bead Ce	int: 0	Curreat Budget FTE:			
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Lurrent Bud	55650	Pathology				Departi			
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geted	Posi	ition Status:	Active	Approved	Status Date:	07/01/2005	<mark>⊠ Bù</mark>		
	1.00	ition Number:		Administrative Professional					

NAV: Organizational Development>Position Management>Review Position/Budget Info>Budget Status

Vacant Budgeted Positions Screen

- 1. Return to **Review Position/Budget Info** screen and click the **Vacant Budgeted Positions** link.
- 2. The search screen will display:



3. Enter the search criteria and click the **Search** button.





- 4. Search Results will display. Select the position to be viewed.
- 5. The **Position Information** tab will appear and the position record will display:

Regular/Temporary Position Regular 000217 Regular 001797	Descriptio		WORK EDG/	Position Status	C Reports To	ustomize Find	View All 🖳	First 1	-10 of 11 D La
Regular/Temporary Position Regular 000217 Regular 001797	Descriptio	on	WORK EOG	Position	Penorte To	Short	Vacant	Max Head	
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	Administr	rative Professio	nal	Approved	005976	BusOpAdmn	1	1	Full-Time
Regular 002412	Administr	rative Profession	nal	Approved	016774	AdmPrSr	1	1	Full-Time
Regular 003885	Dean			Approved	002958	SrVP&Prvst	1	1	Full-Time
Regular 004588	Office/Pro	gm Support Ge	enl	Approved	003054	StdSvcAdmn	1	1	Full-Time
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ed 003885 Dean	1	1	Full-Time	Regular)18344	Associate Dean		Аррі

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions



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Function	Salary A	dministration Plan	Salary Grade	Step Positio	on Job Code	Short DescriptionM	lanager Level
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	2031	Alexatemi	Nison-Migg	<u></u> 2000	dini.	213-	
016345	0927	ProfEmerts	Non-Mgr	020	NPL	NP	
0182844	084185	AssociDeam	NioneMigr	11163	NRU:	NP	

6. Click the **Job Information** tab to display the following:

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions

7. Click the Work Location tab to display the following:

Vacant Budgeted Positions					
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Location		Position	Description		
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438 College Street		001797	The-University of	Wermiont	
438 College Street		002412	The University of	Vermont	
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438 College Street			010644	The University of Vermont	
438 Gollege Street			043464	The University of Vermont	
438 College Street			016345	The University of Vermont	
438 College Street			018344	The University of Vermont	
		Return f	to Search 🔛 Not	tifv	

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions

8. To return to the Search Results, click the Return to Search button.



Appendix

Action / Reason – Changes to a record require the user to select an *Action* from an extensive pick list, indicating why the action was taken (e.g. *Data Change, Demotion, Hire, Layoff, Position Change, Termination,* etc.). *Reason* codes are also chosen from a drop-down menu based on the selected action. The reason provides more detail on why an action was taken.

Compa-Ratio – The Comparative Ratio illustrates how the particular employee's rate of compensation compares to other employees within the same Salary Grade.

Compensation Rate – This is the rate at which an employee is paid during a pay period.

Effective Date – This field indicates date on which a transaction occurred. It allows a chronological history of the data.

Effective Sequence – Enables the user to enter more than one row with the same *Effective* Date (e.g. entering a transfer and a pay rate change on the same day)

Empl Class – Allows UVM to group its employees into various categories via a pick-list (i.e. 12 Month Staff, 10 Month Faculty, 9 Month Graduate Assistant, etc.).

Employee Type – Potential codes: H=*Hourly*; S=*Salaried*

Encumbrance – This is a management tool used to reflect commitments in the accounting system and attempt to prevent overspending. Encumbrances allow organizations to recognize future commitments of resources prior to an actual expenditure.

Ethnic Group – This information is provided by the employee.

FICA Status – FICA is a federal payroll tax used to fund Social Security and Medicare. This field includes a drop down menu including the following choices: *Exempt, Medicare Only, Subject.*

Frequency –



Terminology Index

The Terminology Index is a useful, quick-reference tool. Each term has been linked to its precise location in the corresponding screen shot. Click on the term to jump directly to its place in the document.

-A-	-F-
Addresses	First Start Date
Amount Variance	FLSA Status
-B-	Frequency
Benefits Service Date	<u>FTE</u>
Business Unit	Full/Part Time
-C-	-G-
Change Amount	<u>Grade</u>
Change Percent	Grade Entry Date
Citizenship Proof	-H-
Company Seniority Date	Headcount Status
Comparative Information	Highest Education Level
Comparative Ratio	HR Status
Compensation Rate	-J-
-D-	Job Code
Date of Birth	-L-
Date of Death	Last Start Date
<u>Department</u>	
-E-	
Eligibility to Work in US	
Employee Class	
Employee ID	
Employee Status	
Employee Type	
Encumber Salary Option	
Ethnic Group	
Exit Reason	