



Mini-Manual

SCREENS AND PROCESSES FOR BUSINESS MANAGERS

Note: 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 psguides@uvm.edu.

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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 [Terminology Index](#) 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)-3t4 Attachthat can bwithin Peophe tye(h)6(a)-3s-3005r1 0 0 1 549.82 s(t)6



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3. The search screen will display:

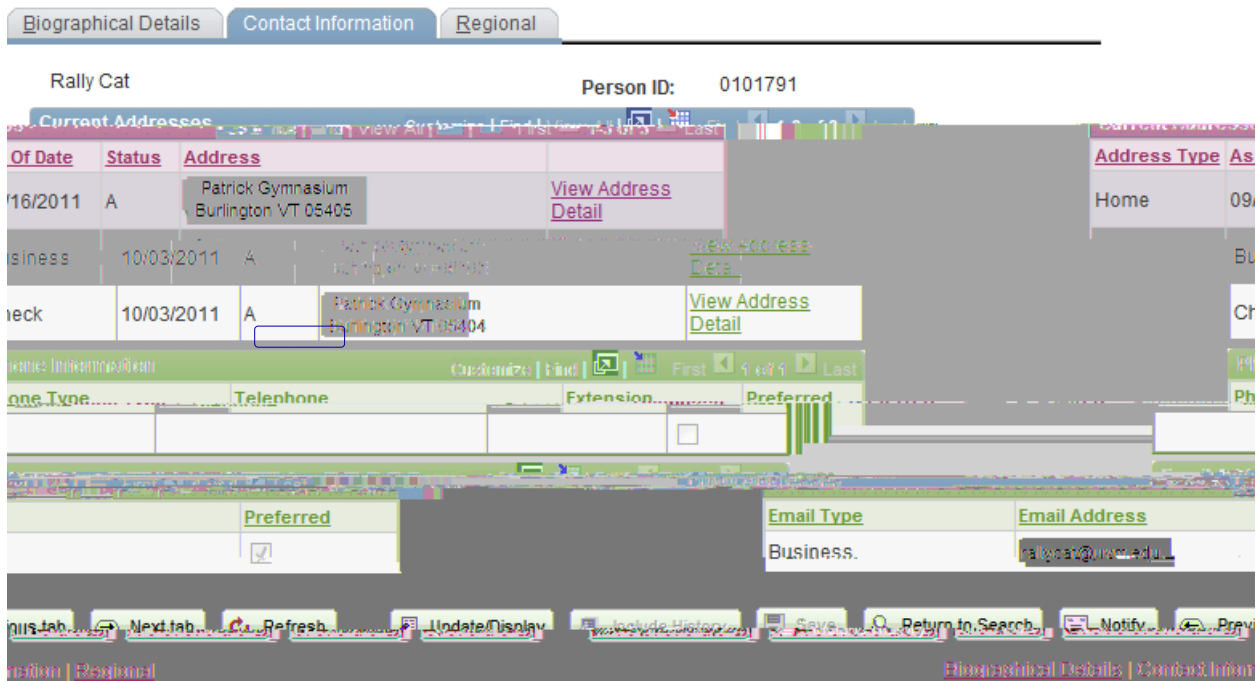


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- 7. To see all historical records for the employee, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Contact Information Screen

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



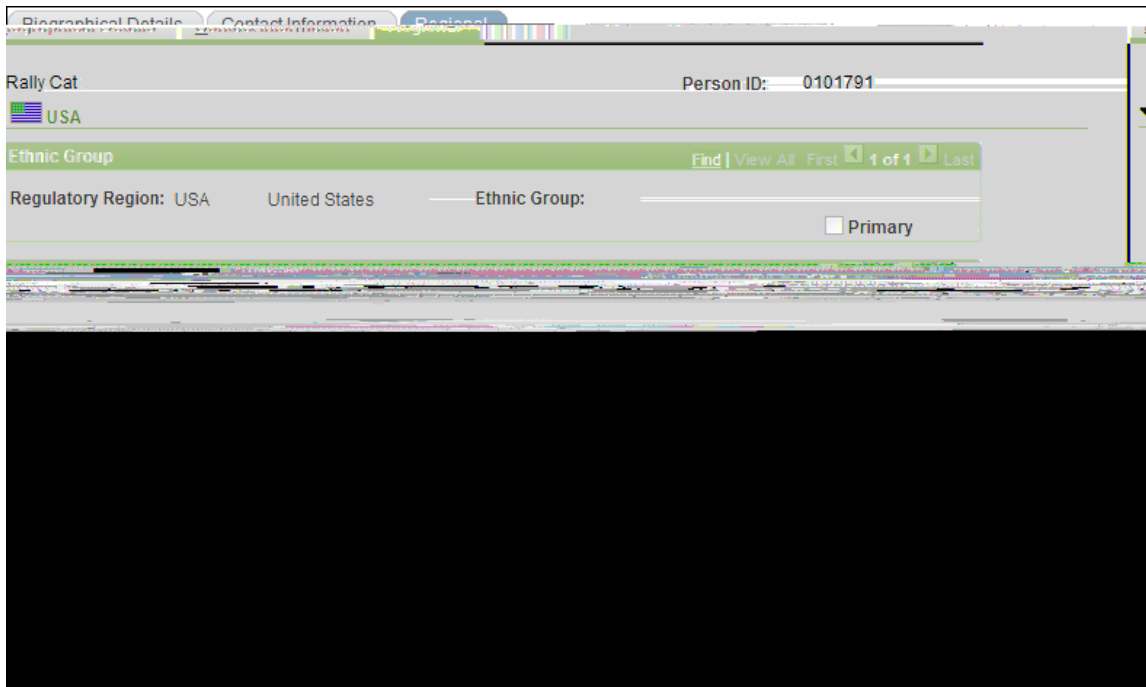
NAV: Workforce Administration>Personal Information>Biographical>Modify a Person>Contact Information



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Regional Screen

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



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**



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3. The search screen will display:

4. Ent16 122 42.150 1 Tm.156 122 42.1584 6o6 17B984 45E

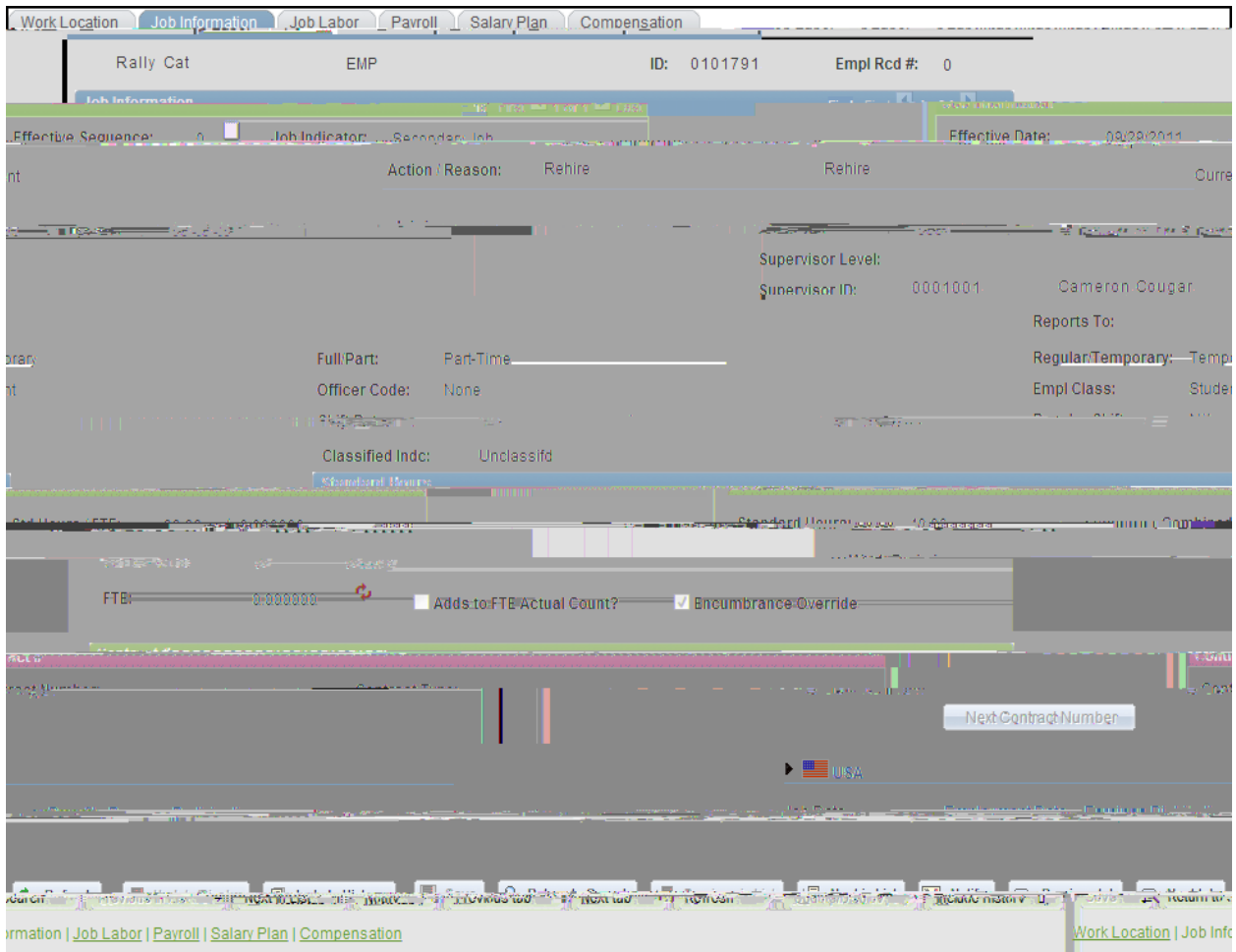


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- To see all historical records for the employee, click the **Include History** button. (If *Include History* wasn't selected on the original search screen.) Use the arrows in the top right corner of the view to display the next or previous record.

Job Information Screen

- Click the **Job Information** tab to display the following:



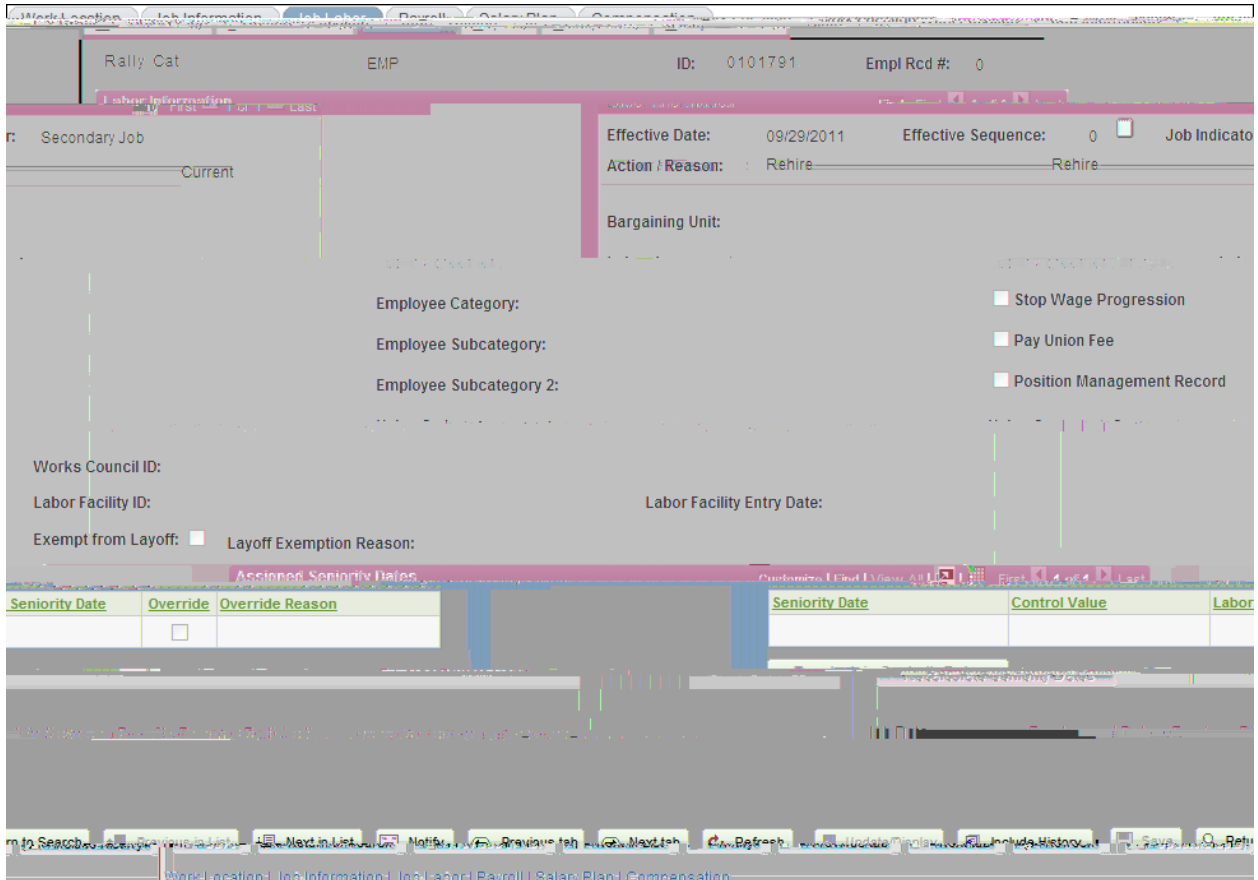
NAV: Workforce Administration>Job Information>Job Data>Job Information



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Job Labor Screen

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



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



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Payroll Screen

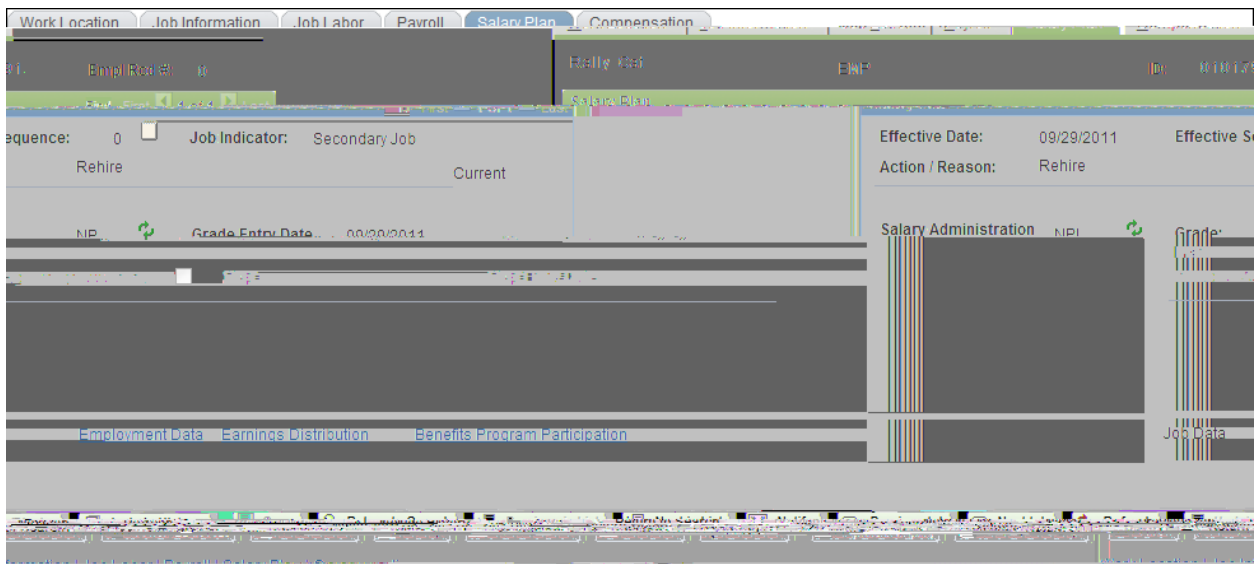
10. Click the **Payroll** tab to display the following:



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

Salary Plan Screen

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



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



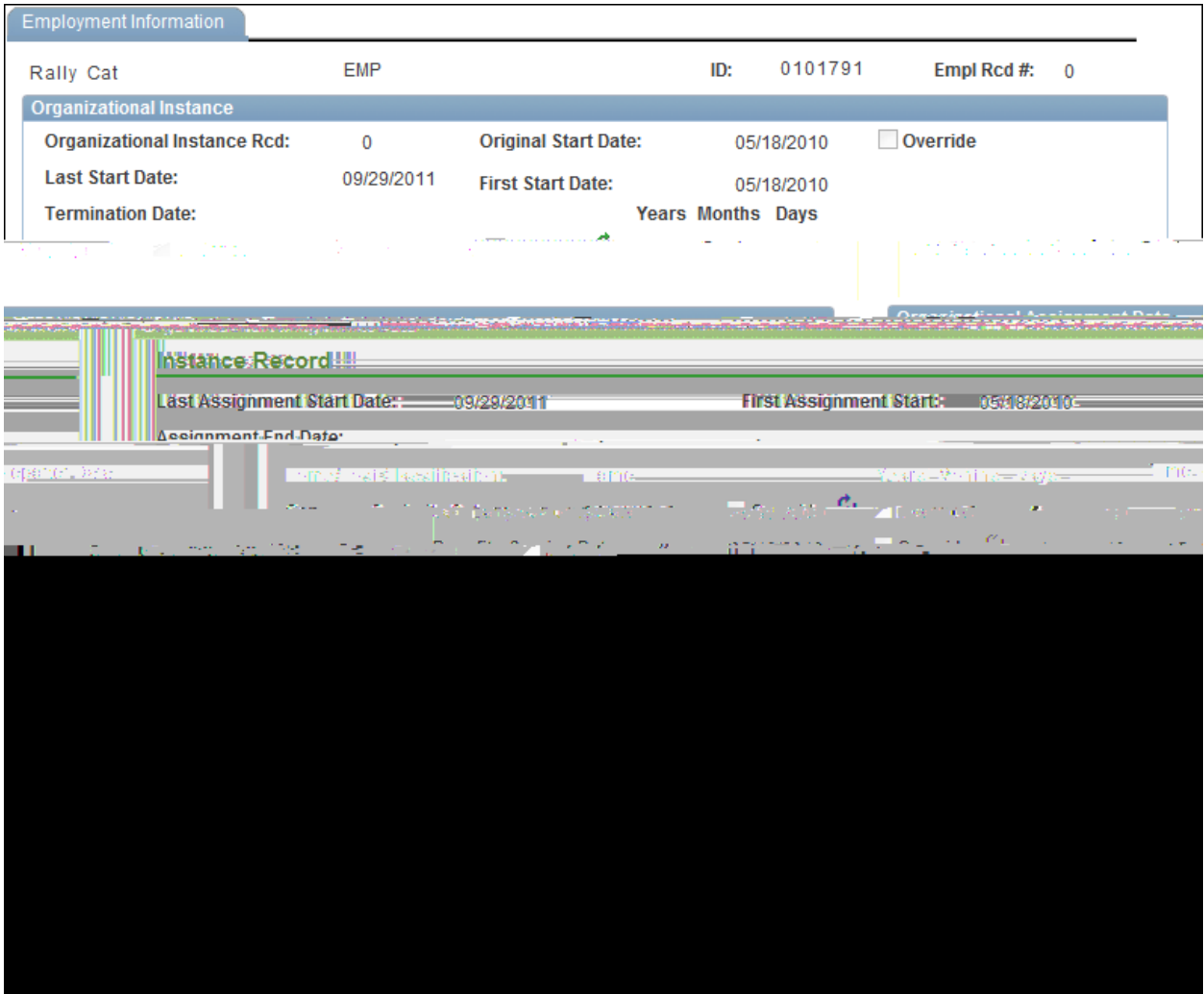
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Employment Data Screen

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



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

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

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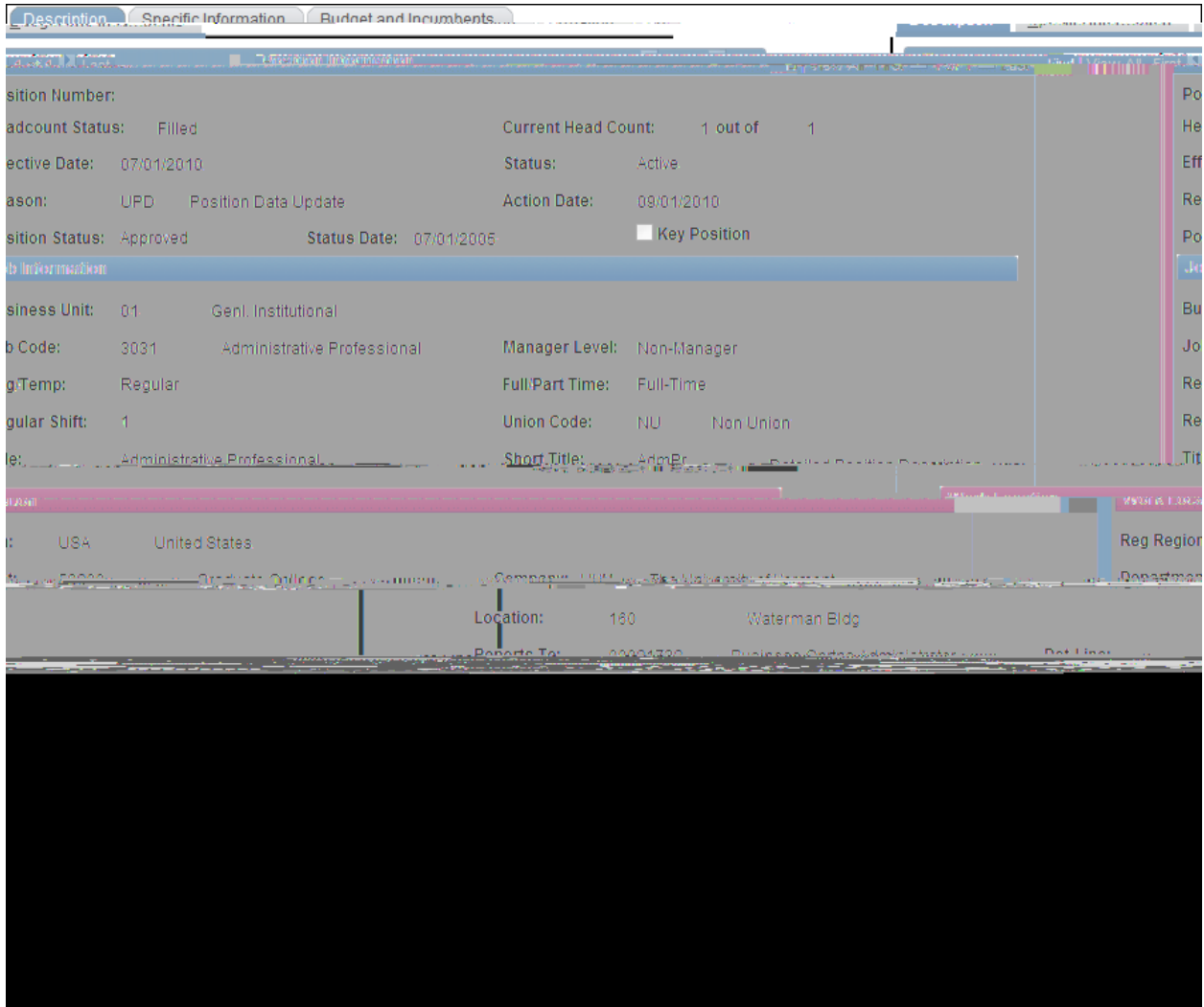
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Description Screen

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



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.

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Updated 5/2/2014

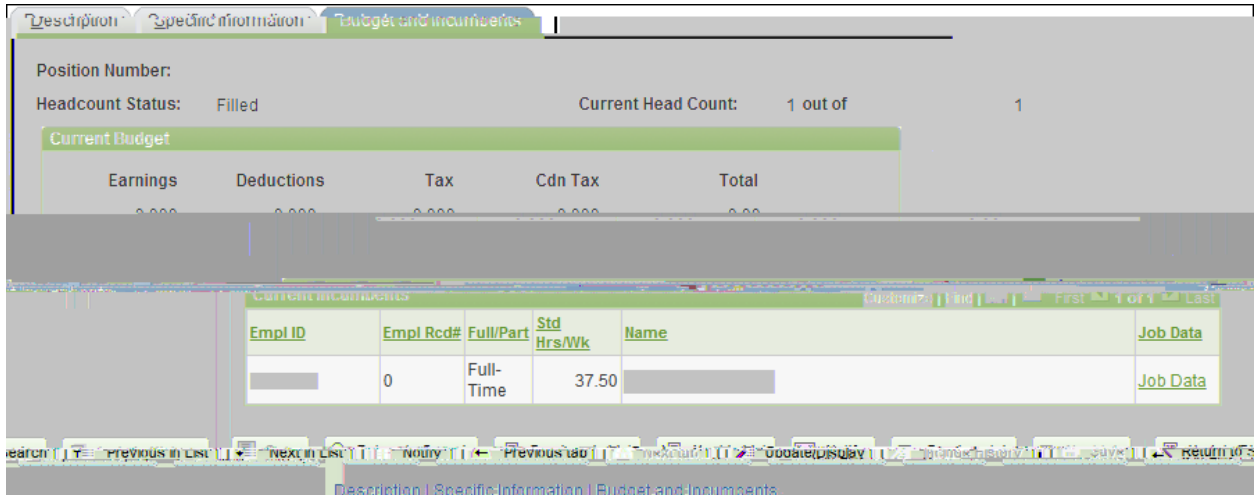
Update2 1 np611 np611 np611 n



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Budget and Incumbents Screen

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

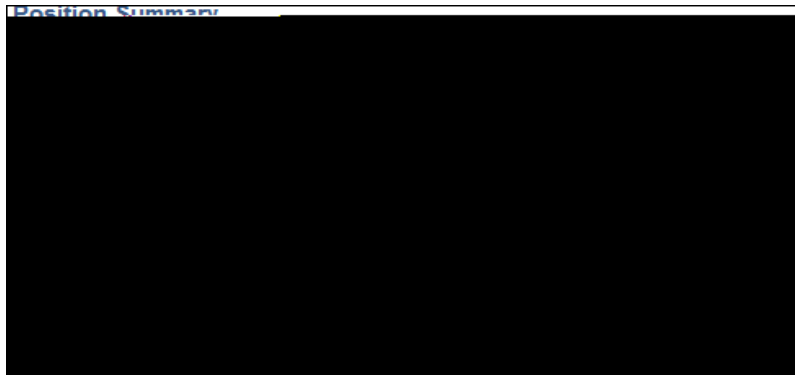


NAV: Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info>Budget and Incumbents

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** (www.uvm.edu/~erp/portal/).
2. Navigation: **Organizational Development > Position Management > Review Position/Budget Info > Position Summary**
3. The search screen will display:





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

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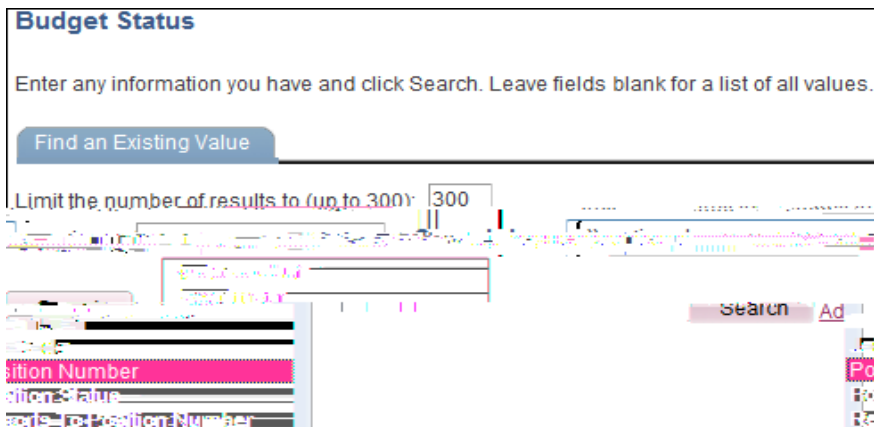
5. The **Position History** tab will appear and the position record will display:



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

Budget Status Screen

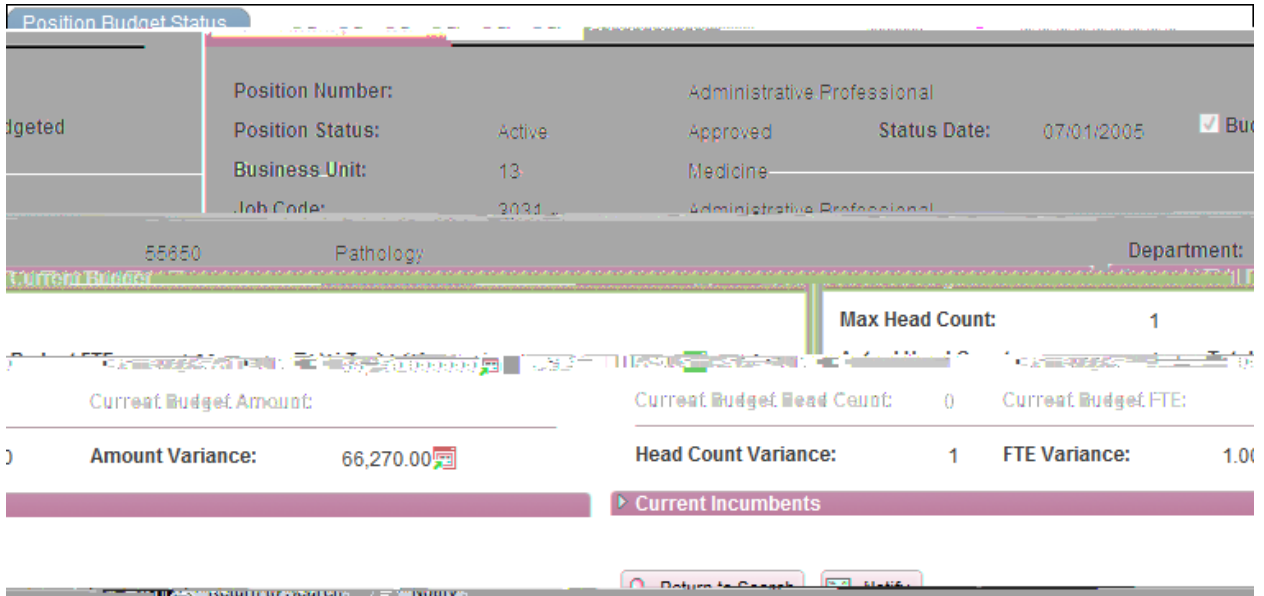
1. Return to **Review Position/Budget Info** screen and click the **Budget Status** link.
2. The search screen will display:



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

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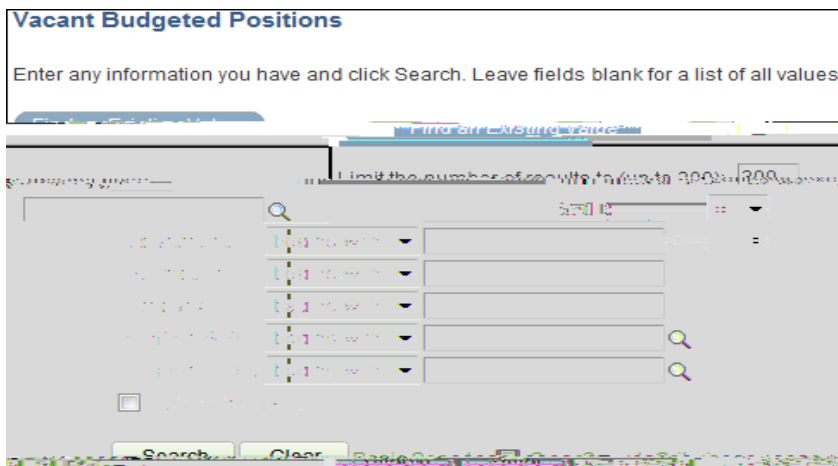
- The **Position Budget Status** tab will appear and the position record will display:



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

Vacant Budgeted Positions Screen

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



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



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

Vacant Budgeted Positions

SetID: SHARE Department: 52000 A&S Dean's Ofc Total Vacant Positions: 11

Function	Salary Administration Plan	Salary Grade	Step	Position	Job Code	Short Description	Manager Level
00021730	0002	TBCFaculty	Other		NPL		NP
004787	0001	AdmPr	Non-Mgr	208	P19		303
002412	3031	AdmPr	Non-Mgr	110	NPL		NP
004588	2031	OPSPtGenl	Non-Mgr	200	C19		203
010644	0818	AssocDean	Non-Mgr	110	NPL		NP
016345	0927	ProfEmerts	Non-Mgr	020	NPL		NP
010344	0001	AssocDean	Non-Mgr	110	NPL		NP

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

SetID: SHARE Department: 52000 A&S Dean's Ofc Total Vacant Positions: 11

Location	Position	Description
438 College Street	00021730	The University of Vermont
438 College Street	004787	The University of Vermont
438 College Street	002412	The University of Vermont
438 College Street	004588	The University of Vermont
438 College Street	010644	The University of Vermont
438 College Street	016345	The University of Vermont
438 College Street	010344	The University of Vermont

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.



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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 –



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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-

[Addresses](#)

[Amount Variance](#)

-B-

[Benefits Service Date](#)

[Business Unit](#)

-C-

[Change Amount](#)

[Change Percent](#)

[Citizenship Proof](#)

[Company Seniority Date](#)

[Comparative Information](#)

[Comparative Ratio](#)

[Compensation Rate](#)

-D-

[Date of Birth](#)

[Date of Death](#)

[Department](#)

-E-

[Eligibility to Work in US](#)

[Employee Class](#)

[Employee ID](#)

[Employee Status](#)

[Employee Type](#)

[Encumber Salary Option](#)

[Ethnic Group](#)

[Exit Reason](#)

-F-

[First Start Date](#)

[FLSA Status](#)

[Frequency](#)

[FTE](#)

[Full/Part Time](#)

-G-

[Grade](#)

[Grade Entry Date](#)

-H-

[Headcount Status](#)

[Highest Education Level](#)

[HR Status](#)

-J-

[Job Code](#)

-L-

[Last Start Date](#)