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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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 be taken directly to the screen shot where it can be located. Navigation paths have also been listed throughout to make it easier to access the correct section of PeopleSoft.

Workforce Administration

Workforce Administration allows the user to view all pertinent information, both current and historic, about an individual employee (e.g. demographics, anniversary and birth dates, addresses and phone numbers, business unit, department, job information, employee status, compensation rates, etc.). The Employee Record # (0, 1, 2, etc.) found in the right corner of each screen indicates which record is visible. Each employee begins with the record number 0. The employee is assigned additional numbers as required by job or status changes.

Note: The following images from PeopleSoft contain real, “live” data. Therefore, all references to the individual employee or position have been removed.

Step-by-Step Instructions: Personal Information Screen

1. Log in to PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal/).

2. Navigation: Workforce Administration > Personal Information > Biographical > Modify a Person
3. The search screen will display:

![Image of search screen]

4. Enter the search criteria and click the Search button.

5. Search Results will display. Select the employee.

Biographical Details Screen

6. The Biographical Details tab will appear and the employee’s most current record will display:

![Image of biographical details]

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

![Contact Information Screen Image]

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

9. Click the Regional tab to display the following:

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:

   ![Search Screen](image)

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

5. Search Results will display. Select the employee.

**Work Location Screen**

6. The **Work Location** tab will appear and the employee’s first record will display:

   ![Work Location Screen](image)

   **NAV:** Workforce Administration>Job Information>Job Data>Work Location
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**

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

![Job Information Screen](image)

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

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

```
NAV: Workforce Administration>Job Information>Job Data>Job Labor
```
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
Compensation Screen

12. Click the **Compensation** tab to display the following:

NAV: Workforce Administration->Job Information->Job Data->Compensation
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.
The purpose of the Workforce Development module is to identify and track employee-specific information regarding tenure.

**Note:** The following images from PeopleSoft contain real, “live” data. Therefore, all references to the individual employee or position have been removed.

**Faculty Events**

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **Workforce Development** > **Faculty Events** > **Calculate Tenure** > **Create Tenure Data**

3. The search screen will display:

   ![Search Screen](image)

   - **Find an Existing Value**
     - Limit the number of results to (up to 300): 300
     - Empl ID: begins with
     - Name: begins with
     - Last Name: begins with
     - Second Name: begins with
     - Alternate Character Name: begins with
     - Middle Name: begins with
     - Include History: [ ]
     - Case Sensitive: [ ]

     **Buttons:** Search, Clear, Basic Search, Save Search Criteria

4. Search Results will display. Select the employee to be viewed.
Tenure Data Screen

5. The Tenure Data screen will appear and the employee’s current record will display:

![Tenure Data Screen Image]

NAV: Workforce Development>Faculty Events>Calculate Tenure>Create Tenure Data

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

Organizational Development

Organizational Development provides the user critical information regarding positions within the user’s area of responsibility. Budget data, reporting relationships and salary administration information are all located within this module.

Note: The following images from PeopleSoft contain real, “live” data. Therefore, all references to the individual employee or position have been removed.
Position Management

1. Log in to PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal/).


3. The search screen will display:

   ![Add/Update Position info](image)

4. Enter the search criteria and click the Search button.

5. Search Results will display. Select the position to be viewed.
Description Screen

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

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.
Specific Information Screen

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

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

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

![Budget and Incumbents tab](image)

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/](http://www.uvm.edu/~erp/portal/)).


3. The search screen will display:
4. Enter the search criteria and click the **Search** button.

5. **Search Results** will display. Select the position to be viewed.

### Position Data Summary Screen

6. The **General** tab will appear and the position record will display:

![Position Data Summary](image)

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

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

![Position Data Summary](image)

NAV: Organizational Development>Position Management>Review Position/Budget Info>Position Summary
8. Click the **Payroll Information** tab to display the following:

![Position Data Summary](image)

**NAV:** Organizational Development>Position Management>Review Position/Budget Info>Position Summary

### Position History Screen

1. Return to **Review Position/Budget Info** screen and click the **Position History** link.

2. The search screen will display:

![Position History](image)

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

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

![Position History screenshot]

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:

![Budget Status search screen]

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 record will display:

![Position Budget Status](image)

**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:

![Vacant Budgeted Positions](image)

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:

```
<table>
<thead>
<tr>
<th>Position</th>
<th>Description</th>
<th>Position Status</th>
<th>Reports To</th>
<th>Short Description</th>
<th>Vacant Positions</th>
<th>Max Head Count</th>
<th>Full/Part Time</th>
<th>Regular/Temporary</th>
</tr>
</thead>
<tbody>
<tr>
<td>00021730</td>
<td>TBC Faculty</td>
<td>Approved</td>
<td>003885</td>
<td>Dean</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>001797</td>
<td>Administrative Professional</td>
<td>Approved</td>
<td>005976</td>
<td>BusOpAdmin</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>002412</td>
<td>Administrative Professional</td>
<td>Approved</td>
<td>016774</td>
<td>AdmPrgmGr</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>003885</td>
<td>Dean</td>
<td>Approved</td>
<td>002958</td>
<td>SrVP&amp;Physt</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>004388</td>
<td>Office/Program Support Genl</td>
<td>Approved</td>
<td>003054</td>
<td>SrSvcAdmin</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>005976</td>
<td>Business Operations Admin</td>
<td>Approved</td>
<td>003885</td>
<td>Dean</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>010844</td>
<td>Associate Dean</td>
<td>Approved</td>
<td>018330</td>
<td>InterimDean</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>013161</td>
<td>Office/Program Support Genl</td>
<td>Approved</td>
<td>003054</td>
<td>SrSvcAdmin</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>016345</td>
<td>Professor Emeritus</td>
<td>Approved</td>
<td>003885</td>
<td>Dean</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
<tr>
<td>018344</td>
<td>Associate Dean</td>
<td>Approved</td>
<td>003885</td>
<td>Dean</td>
<td>1</td>
<td>1</td>
<td>Full-Time</td>
<td>Regular</td>
</tr>
</tbody>
</table>
```

NAV: Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions
6. Click the **Job Information** tab to display the following:

![Vacant Budgeted Positions](image)

**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](image)

**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** – This field indicates how often an employee is paid. Potential codes: B=*Biweekly*; S=*Semimonthly*.

**Headcount Status** – This field indicates whether a position is *Filled* or *Open*.

**HR Status** – A=*Active*; I=*Inactive*

**Job Code** – A unique code associated with a specific job in the organization.

**Job Indicator** – Allows PeopleSoft to manage multiple jobs for one employee. This field will display *Primary Job* or *Secondary Job*. 
**Pay Group** – Potential codes: BW1=Biweekly; KRO=Kronos; PDF=Pre/Post Doc Fellows; SM1=Semimonthly

**Payroll Status** – Potential codes: Active, Deceased, Leave With Pay, Leave of Absence, Retired, Retired With Pay, Retired-Pension Administration, Short Work Break, Suspended, Terminated, Terminated Pension Pay Out, Terminated With Pay

**Status** – A=Active; I=Inactive

**Tenure Status** – Potential codes: Non Tenure Not On Track, Non Tenure On Track, Not Applicable, Other, Tenure, Tenure Denied, Tenure by de facto.

**Track Start Date** – Displays the date that the employee's tenure accrual begins.

**Union Codes** – NU: Non Union; TM: Teamsters Local Union No. 597; U1: United Academics (Full Time); U2: United Academics (Part Time); U3: United Academics PT in FT Union; UE: United Electrical Local Union No. 267

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**Additional Resources**

**Human Resource Services**

- Manager's Corner
- Skills Development
- Staff Handbook
- Institutional Policies

**Faculty Resources**

- Faculty Handbook
- Board of Trustees Policy Manual

**Suggestions? Updates?** Send an e-mail to psguides@uvm.edu

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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
Location
-M-
Manager Level
Max Headcount
-O-
Org Instance Service Date
Original Start Date
-P-
Pay Group
Pay Rates
-Payroll Status
-Person ID
Phone Numbers
Position End Date
Position Entry Date
Position Number
Position Status
-R-
Regular/Temporary
Reports To
-S-
Salary Admin Plan
Salary Administration
Salary Plan
Seniority Pay Calc Date
Standard Hours
Status
Status Date
-T-
Termination Date
Title
Total Budget Amount
Total Budget FTE
-U-
Union Code