

State of Georgia

Phoenix Program

Implementing Georgia's New Millennium Human Resource
and Financial Solutions

Introduction to PeopleSoft

repr. 04/03



Phoenix End-User Training

MODULE 1:

INTRODUCTION TO PEOPLESOFT

PARTICIPANT GUIDE

PEOPLESOFT HRMS 7
PEOPLESOFT HUMAN RESOURCES
APRIL 2003

Human Resources - Introduction to PeopleSoft



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Introduction to PeopleSoft



Welcome to the Introduction to PeopleSoft module! This module contains the tools needed to learn the introductory concepts and activities involved in working with PeopleSoft and the online Library.

Goal

To have the skills and knowledge necessary to describe concepts and perform activities identified in the Navigating through PeopleSoft, PeopleSoft Basics, and using the online Library sections of the online Library.

Participant Objectives

At the end of this module you will be able to:

1. Navigate through PeopleSoft
2. Work with data in PeopleSoft
3. Describe PeopleSoft key concepts
4. Record employee personal data
5. Record employee employment data
6. Record employee job data
7. Use the online Library
8. Navigate through the online Library to locate Phoenix Program processes and procedures

Prerequisite:

PeopleSoft 7 Pre-Class Navigation Tutorial, found on

<http://www.knowledgecenter.peoplesoft.com/af/peoplesoft/my/free.html>



Module Contents

Section 1 Working in the PeopleSoft Environment
Section 2 Working with PeopleSoft Data
Section 3 Working in the Online Library



Phoenix End-User Training

SECTION 1:

WORKING IN THE PEOPLESOFT ENVIRONMENT

PARTICIPANT GUIDE

PEOPLESOFT HRMS 7
PEOPLESOFT HUMAN RESOURCES
APRIL 2003

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A. Introduction

Working in the PeopleSoft Environment



Welcome to Working in the PeopleSoft Environment section. This section contains the tools needed to log on to the PeopleSoft environment, and to learn the concepts and procedures involved in Working in the PeopleSoft Environment.

Goal: To acquire an overall understanding of the tools available to assist you in working in the PeopleSoft environment - in the classroom and on the job. In addition, you will acquire the skills and knowledge necessary to describe the concepts and perform the activities identified in the Logon to PeopleSoft, Navigation, and Data Retrieval sections of the online Library.

Objectives:

1. Describe the purpose of the Training Database
2. Logon to the PeopleSoft Training Database
3. Describe the purpose of windows
4. Describe menus and menu items
5. Describe the purpose of panels and panel groups
6. Describe toolbar button/keyboard functionality
7. Describe the purpose of a search dialog box
8. Describe the purpose of a key field
9. Describe the purpose of multi-part key fields
10. Distinguish between primary and alternate key field searches
11. Describe the purpose of using the Cntrl + F4 search combination
12. Navigate through PeopleSoft
13. Retrieve data in PeopleSoft

B. Business Processes

Activity	Materials
 LECTURE	 GUIDE

There are no business processes for this class.

C. Exercises

Exercise 1 – Log on to PeopleSoft Human Resources

Scenario: In this exercise you will learn how to successfully log on to PeopleSoft.

Step 1	<p>Select: The desktop icon and double-click. (Your instructor will give you the location.)</p> <div style="text-align: center;">  </div>
Expected Results:	The PeopleSoft Sign-on dialog box displays.

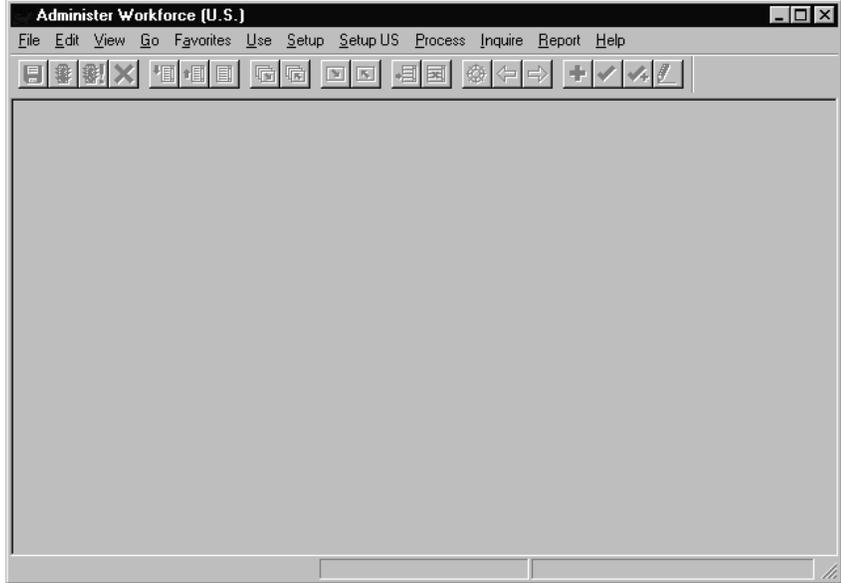
Step 2	<p>Enter the following:</p> <p>Application Server: Your instructor will provide this information. Operator ID: Your instructor will provide this information. Password: Your instructor will provide this information</p> <p>Click: OK</p>
Expected Results:	The PeopleSoft Human Resources application opens. This may take a moment. If you receive no error messages, wait for further instruction.

Exercise 1 (continued)

Window

Through menu selections you are able to access various PeopleSoft windows. A window is a section of PeopleSoft that allows you to access data entry panels. Different windows allow you to access different panels. For example, if you are using the Human Resources module of PeopleSoft, one window is specific to training, another to recruiting functions, and another for hiring and maintaining employee records and yet another one for creating and maintaining position records. These windows are used to access the panel or panel groups in which table maintenance, data entry, process, view, and/or report procedures are performed. If you need to view more than one window at a time, a menu option is available for that capability.

PeopleSoft windows share many characteristics with other Microsoft window applications, such as a title bar, maximize and minimize buttons, control menu box, a menu bar, a toolbar, and a status bar.

<p>Step 3</p>	<p>Compare your window to the window shown below.</p> 
<p>Expected Results:</p>	<p>The window matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 2 - Navigate through Administer Workforce Menu Options

Menu Items

PeopleSoft is a table-driven application that stores information in a large number of tables. Navigation is done through a user interface made up of menus windows, and panels. Menu bar items display beneath the title bar in every PeopleSoft window and the options in the menu bar will vary depending on the panel and the user security access rights.

There are six menu items that are common on every PeopleSoft Window. The rest of the menu bar items are panel-dependent.

Standard Selections

The **File** menu item lists actions that save or process data. This menu item is also used to exit the PeopleSoft system. The **Edit** menu item lists the various data entry functions to use as you move through panels and update the database. These options are also available through the toolbar and function keys. The **View** menu item lists navigation options used as you move through panels and update the database. Some of these options are also available through the toolbar and function keys. The **Go** menu item accesses the different window groups a user is authorized to use. From the Go menu item you may select the “new window” option. This option will allow the user to open more than one window at a time. The **Favorites** menu item lists personal preferences of commonly used panels to be accessed quickly from any PeopleSoft window. The **Help** menu item provides access to online help.

There are five additional menu items that display on the menu bar depending on the specific panel you are using and your security access rights.

Non-Standard Selections

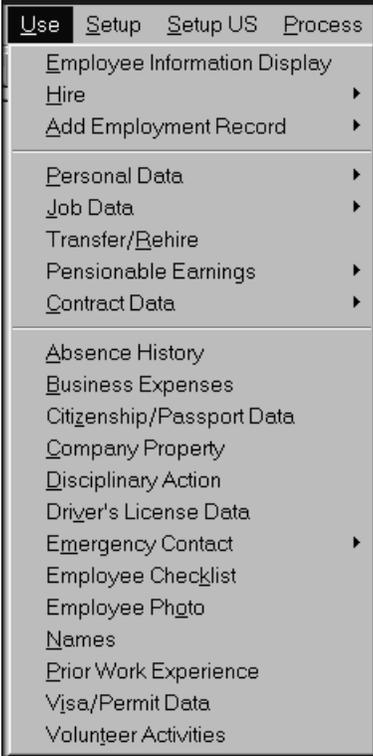
The **Use** menu item provides access to the data entry panels you are authorized to access. The **Setup** menu item provides access to the user defined data entry tables. The **Process** menu item provides the ability to run certain processes. End users may use this menu item as a step in running certain reports. The **Inquire** menu item provides online summary information. The **Report** menu item provides a list of pre-defined reports available to the end user.

Exercise 2 (continued)

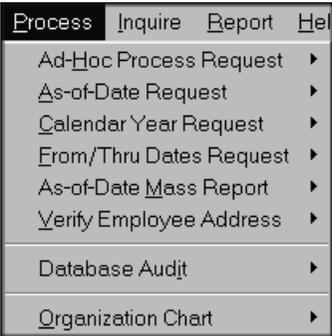
<p>Step 1</p>	<p>Select:</p> 
<p>Expected Results:</p>	<p>Successful navigation to the Administer Workforce (U.S.) window</p>

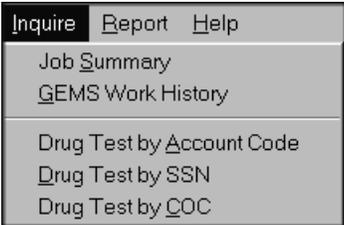
<p>Step 2</p>	<p>Review the Go menu option.</p> 
<p>Expected Results:</p>	<p>An understanding of the Go menu options</p>

Exercise 2 (continued)

<p>Step 3</p>	<p>Review the Use menu option.</p> 
<p>Expected Results:</p>	<p>An understanding of the Use menu options</p>

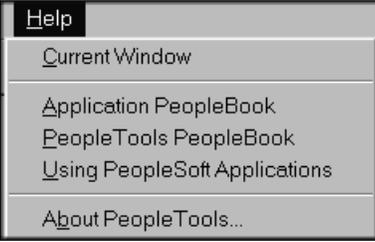
Exercise 2 (continued)

<p>Step 4</p>	<p>Review the Process menu option.</p> 
<p>Expected Results:</p>	<p>An understanding of the Process menu options</p>

<p>Step 5</p>	<p>Review the Inquire menu option.</p> 
<p>Expected Results:</p>	<p>An understanding of the Inquire menu options</p>

Exercise 2 (continued)

Step 6	<p>Review the Report menu option. The operator profile will determine the report menu options.</p> 
Expected Results:	An understanding of the Report menu options

Step 7	<p>Review the Help menu option.</p> 
Expected Results:	An understanding of the Help menu options

Exercise completed.

Exercise 3 – Access a Panel

Panels

A panel is the graphical interface between the user and the relational database. Panels are the actual screens containing various fields that enable you to update and view the data in the database.

Panel Groups

Sometimes there is more information than one panel can process. Panel groups were created for these large data entry procedures. Each panel in a group contains a portion or subgroup of the data. For example, the panel group for Personal Data has two panels: Personal Data 1 contains basic personal information such as name, address, and phone number, while Personal Data 2 contains EEO information. All the panels in a group are processed as one.

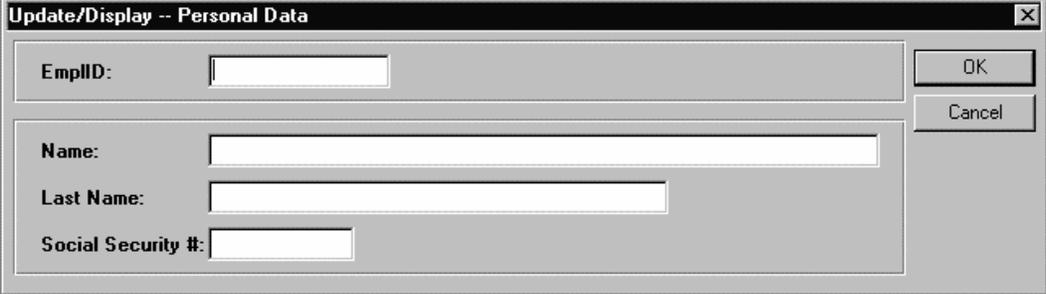
Searches/Primary Key Field/Alternate Key Field/Multi-Part Key Fields/and Data Retrieval

In addition to selecting the panel to use, you must select which row of data to display on the panel. A field or combination of fields uniquely identifies every row of data in PeopleSoft. They are called key fields. These fields are used to link data throughout the database. When a panel or panel group is selected, a search dialog box displays. This box prompts you to enter a key so the system can retrieve the appropriate information from the database. The Primary Key Field will identify the exact data row, record or information requested. The Alternate Key Field will identify a list for you to choose the appropriate data row, record or information requested. When two or more key fields are combined to identify a row of data they are called Multi-Part Key Fields. Searches using F4 combinations can increase the system response time when the data retrieval is from tables that have many rows. You can prompt for lists of valid values by entering partial values.

Exercise 3 (continued)

Step 1	Select: Go → Administer Workforce → Administer Workforce (U.S.)
Expected Results:	The Administer Workforce (U.S.) window displays.

Step 2	Select: Use → Personal Data → Personal Data 1
Expected Results:	The Personal Data dialog box displays.

Step 3	 <p>Enter the following search criteria:</p> <p>EmplID: 00000596 (Christian,Jethro)</p> <p>Click: OK</p>
Expected Results:	An understanding of how a search dialogue box works utilizing Primary/Alternate Key fields

Exercise 3 (continued)

Step 4

Administer Workforce (U.S.) - Use - Personal Data

File Edit View Go Favorites Use Setup Setup US Process Inquire Report Help

Personal Data 1 Personal Data 2

Name: ID: 000000596

Prefix: Personnel Status: Employee

SSN: Original Hire Date:

Home Address/Phone

Address 1:

Address 2:

Address 3:

City:

County:

State: Zip:

Country:

Phone:

Mailing Address

USA

Other Phone Numbers

Type:

Number:

Personal Data 1 Update/Display

Expected Results:

The panel matches. Congratulations!
If these elements do not match, review the steps again and consult your Instructor.

Exercise 3 (continued)

Data Processing Elements

The data processing elements enable you to initiate system or functional processes and maintain levels of information on your panel.

Data Entry Elements

Panels display a set of data that is requested from tables in the database. Information is stored as records and records are made up of rows of data. The categories of information are referred to as fields and have field names to identify them within the database. Several types of data entry fields display on panels and each field is designed to offer different ways of entering and maintaining information. Each field on a panel is always associated with the actual field in the database. All data entry takes place on the panel or panel group by means of edit boxes, radio buttons, drop-down list boxes, checkboxes or long edit boxes.

Edit Box - Rectangular boxes in which to enter data. The size of the edit box and the number of characters you can enter is determined by the length of its associated database field. There are edit boxes without assigned formatting characteristics, edit boxes with assigned formatting characteristics, edit boxes associated with look up or prompt tables and scrollable edit boxes.

Long Edit Box - Long, often wide, rectangular boxes are for long text items, such as comments. Long edit boxes are used for variable-length alphanumeric fields.

Checkbox - Small square boxes that operate as a toggle switch, On and Off, for data fields that can have one of two values. The on and off toggle typically indicates “Yes” and “No”.

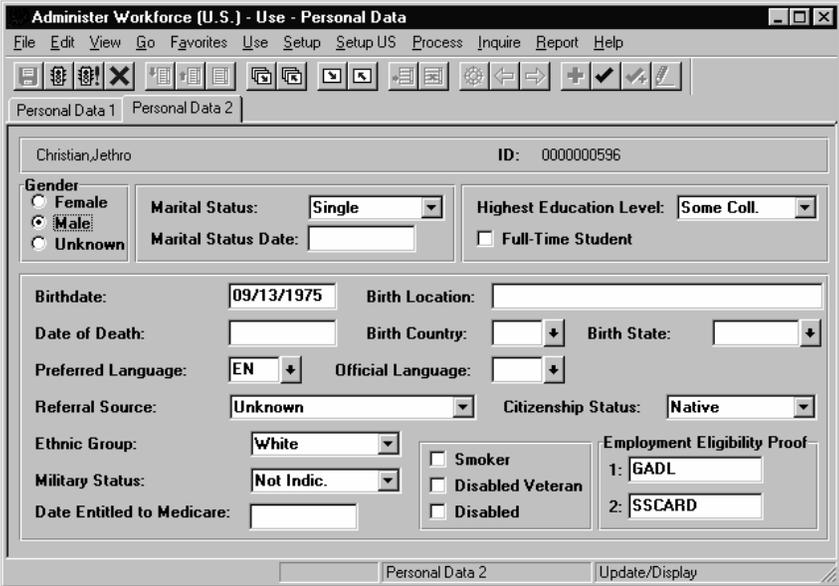
Radio Button - Small round buttons that each represents one option for a field with multiple defined values. Only one radio button in a group can be turned on at one time

Drop-Down List box - Rectangular box with a prompt button within the box. Clicking the prompt button reveals a list of valid values from which you can select a single option. You must select a value from the list. You cannot enter a new value. **Using the search combination F4 can narrow down your search. Since most drop-down fields only list the first 250 values, this function key may be useful in selecting a value further down in the list.**

Push Button - Rectangular button that reveals a sub-panel where additional data may be entered and stored.

Exercise 3 (continued)

Step 5	Click: Personal Data 2 to proceed to the Personal Data 2 panel.
Expected Results:	The Personal Data 2 panel displays.

Step 6	<p>Compare your window to the window shown below.</p> 
Expected Results:	The window matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.

Exercise completed.

Exercise 4 - Navigate through Administer Workforce Toolbar Icons

Each PeopleSoft window has toolbar icons that enable you to perform specific functions. Your goal is to navigate successfully to each toolbar icon and identify its purpose. You will learn the keyboard and the function keys related to these items.

Toolbar Icons are the rectangular buttons located on the toolbar directly beneath the menu bar.

These icons represent application processing actions and are shortcuts to functions associated with data entry.

<p>Step 1</p>	<p>Select: Go → Administer Workforce → Administer Workforce (U.S.) Use → Personal Data → Personal Data 1</p> <p>Enter the following information:</p> <p>EmplID: 0000001 Click: OK</p>
<p>Expected Results:</p>	<p>Successful navigation to the Job Data 1 panel.</p>

<p>Step 2</p>	<p>Compare your toolbar to the toolbar displayed below.</p>  <p>Click the drop-down for Prefix. Change Mr. To Dr.</p>
<p>Expected Results:</p>	<p>If the panel matches, continue to the next step. If these elements do not match, review the steps and consult your Instructor.</p>

Exercise 4 (continued)

<p>Step 3</p>	<p>Review the Process Icons.</p> <p> Save Saves the information you entered in the database-- The save command always updates the data for all panels in a group.</p> <p> Run Runs a process or a report, first prompting you to specify when and where you want it run</p> <p> Run with Defaults Runs a process or a report using preset defaults</p> <p> Cancel Clears the panel without saving the information</p>
<p>Expected Results:</p>	<p>An understanding of the Process icons</p>

Exercise 4 (continued)

Step 4	<p>Review the Search Icons.</p> <p> Next in List Displays the next entry in a list (F9)</p> <p> Previous in List Displays the previous entry in a list (Shift + F9)</p> <p> List Displays all items in a list of valid values (CTL+F9)</p>
Expected Results:	An understanding of the Search icons

Exercise 4 (continued)

<p>Step 5</p>	<p>Review the Navigation Icons.</p> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-bottom: 10px;"> <div style="text-align: center;">  </div> <div style="text-align: left;"> <p>Next Panel in Group</p> </div> <div style="text-align: right;"> <p>Displays the next panel in the current Panel Group (F2)</p> </div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-bottom: 10px;"> <div style="text-align: center;">  </div> <div style="text-align: left;"> <p>Previous Panel in Group</p> </div> <div style="text-align: right;"> <p>Displays the previous panel in the current Panel Group (Shift + F2)</p> </div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-bottom: 10px;"> <div style="text-align: center;">  </div> <div style="text-align: left;"> <p>Next Panel</p> </div> <div style="text-align: right;"> <p>Displays the next panel in the menu</p> </div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: center;">  </div> <div style="text-align: left;"> <p>Previous Panel</p> </div> <div style="text-align: right;"> <p>Displays the previous panel in the menu</p> </div> </div>
<p>Expected Results:</p>	<p>An understanding of the Navigation icons</p>

<p>Step 6</p>	<p>Cancel the panel.</p>
<p>Expected Results:</p>	<p>The panel is cleared and the information is not saved.</p>

Exercise 4 (continued)

Step 7	<p>Select: Go → Administer Workforce → Administer Workforce (U.S.) Use → Job Data → Job Data 1 → Update/Display All</p> <p>Enter the following information:</p> <p>EmplID: 00000011 Tab to Empl Rec # 0 Click: OK</p>
Expected Results:	Successful navigation to the Job Data 1 panel.

Step 8	<p>Compare your toolbar to the toolbar displayed below.</p> 
Expected Results:	If the panel matches, continue to the next step. If these elements do not match, review the steps and consult your Instructor.

Exercise 4 (continued)

<p>Step 9</p>	<p>Review the Edit Icons. These will be reviewed in a later exercise.</p> <p> Insert Row Inserts a new row in the current panel or field (F7)</p> <p> Delete Row Deletes a row in the current panel or field (F8)</p> <p> Back Jumps back to the previous window</p> <p> Forward Jumps forward to the next window</p>
<p>Expected Results:</p>	<p>An understanding of the Navigation icons</p>

Exercise 4 (continued)

Step 10	<p>Review the Status Icons.</p> <p> Add Adds a record</p> <p> Update/Display Retrieves data from current and future records</p> <p> Update/Display All Retrieves data from history, current, and future records, All but allows only current and future records to be updated</p> <p> Correction Allows all data to be retrieved and edited</p>
Expected Results:	An understanding of the Status icons

Exercise 4 (continued)

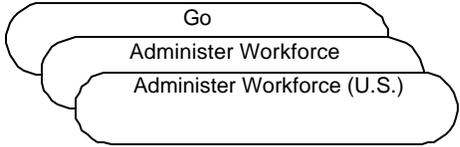
Check Results	
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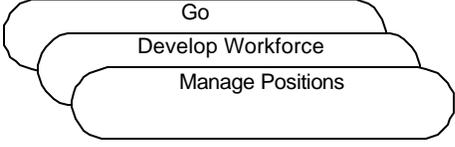
Step 11	<p>Compare your window to the window shown below.</p>
Expected Results:	<p>The window matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

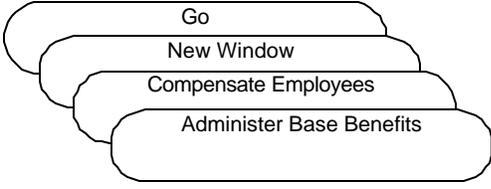
Exercise 5 - Navigate through PeopleSoft Windows

Each PeopleSoft window has a list of menu options allowing you to access certain panels. Your goal is to successfully navigate to each window and identify three panels accessible from that window.

Step 1	<p>Select:</p>  <p>List three panels accessible from this window:</p> <p>_____</p> <p>_____</p> <p>_____</p>
Expected Results:	Successful navigation to the Administer Workforce (U.S.) window.

Step 2	<p>Select:</p>  <p>List three panels accessible from this window:</p> <p>_____</p> <p>_____</p> <p>_____</p>
Expected Results:	Successful navigation to the Manage Positions window

Exercise 5 (continued)

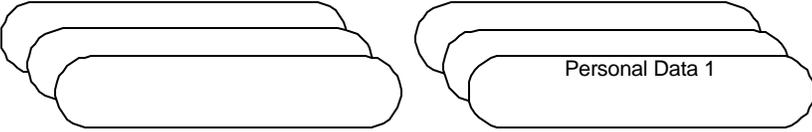
<p>Step 3</p>	<p>Select:</p>  <p>List three panels accessible from this window:</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>Expected Results:</p>	<p>Successful navigation to the Administer Base Benefits window</p>

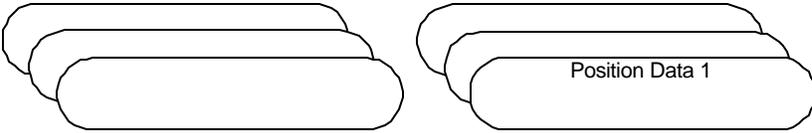
<p>Step 4</p>	<p>NOTE: Results may vary.</p>
<p>Expected Results:</p>	<p>Any panel under the Use menu option provided the navigational path is correct.</p>

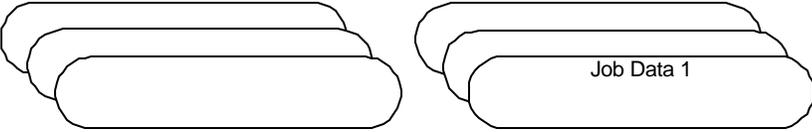
Exercise completed.

Exercise 6 - Locate Panels

To access a panel or a panel group, you must know a navigation path to locate it. Your goal in this exercise is to list the navigation path for each panel shown. You may use the database to help you fill in the following navigation paths. (**Hint: Start with Go**)

Step 1	Fill in the path: 
Expected Results:	Correct navigation path displays

Step 2	Fill in the path: 
Expected Results:	Correct navigation path displays

Step 3	Fill in the path: 
Expected Results:	Correct navigation path displays

Exercise 6 (continued)

Check Results	
----------------------	--

Step 4	<p>Compare your navigation paths with those shown below:</p> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;"> <p>Go</p> <p>Administer Workforce</p> <p>Administer Workforce (U.S.)</p> </div> <div style="text-align: center;"> <p>Use</p> <p>Personal Data</p> <p>Personal Data 1</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;"> <p>Go</p> <p>Develop Workforce</p> <p>Manage Positions</p> </div> <div style="text-align: center;"> <p>Use</p> <p>Position Data</p> <p>Position Data 1</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;"> <p>Go</p> <p>Administer Workforce</p> <p>Administer Workforce (U.S.)</p> </div> <div style="text-align: center;"> <p>Use</p> <p>Job Data</p> <p>Job Data 1</p> </div> </div>
Expected Results:	<p>The navigation path matches. Congratulations!</p> <p>If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 7 – Add to Favorites

Favorites Menu Item

PeopleSoft provides a menu option of Favorites which allows you to record your most frequently accessed panels. You may then select those panels from the Favorites menu option rather than navigating through various windows to select them.

Step 1	Using a panel from your USE list
	Select: Favorites → Add to Favorites
Expected Results:	The Add to Favorites Verification box displays.

Step 2	Select: OK
Expected Results:	The panel that was accessed is added to the Favorites list in the same mode the panel was accessed.

Step 3	Select Favorites
Expected Results:	View list of favorites

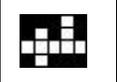
Exercise 7 (continued)

Step 4	Select: Favorites → Delete Favorites Select panel to delete Click: Delete
Expected Results:	The panel selected is deleted from the Favorites list.

Step 5	Select: Favorites View the panel has been deleted from the list.
Expected Results:	The panel is no longer displayed.

Exercise completed.

D. Summary and Review

Activity	Materials	
 LECTURE	 GUIDE	 REVIEW

Objectives review:

1. Describe the purpose of the Training Database
2. Logon to the PeopleSoft Training Database
3. Describe the purpose of a window
4. Describe the menu and menu items
5. Describe the purpose of a panel and panel group
6. Describe the toolbar button/keyboard functionality
7. Describe the purpose of a search dialog box
8. Describe the purpose of a key field
9. Describe the purpose of multi-part key fields
10. Distinguish between primary and alternate key field search
11. Identify a search combination using F4 function key variations
12. Navigate through PeopleSoft
13. Retrieve data in PeopleSoft

Summary and Review (continued)

Discuss the following questions:

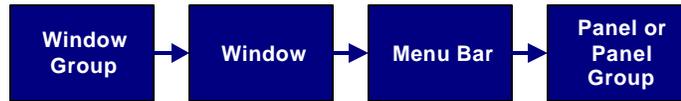
1. How does PeopleSoft identify a row of data?
2. What is the difference between primary and alternate search key?
3. Describe the difference between a panel and panel group.
4. Give three examples of how to move between panels in a panel group.
5. List examples of menu items.
6. What is the graphical user interface between you and the database?
7. What is the purpose of a search dialog box?
8. Explain the use of the F4 search combination variations?

D. Summary and Review (continued)

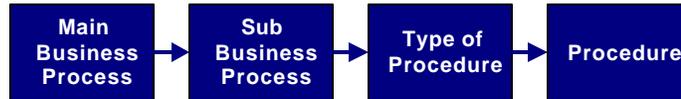
Matching Game	
<p>_____ Having two windows open at the same time requires using this feature.</p>	<ol style="list-style-type: none"> 1. Panel or Panel Groups 2. Navigation path 3. New Window 4. Use 5. Panel Tabs 6. Key Field
<p>_____ These make it easy to move between panels in a panel group.</p>	
<p>_____ Menu Group, Window, Menu Bar, Panel or Panel Group is an example of this.</p>	
<p>_____ This menu item can be used to select panels.</p>	
<p>_____ PeopleSoft's graphical user interface.</p>	
<p>_____ Enables PeopleSoft to uniquely identify a row of data.</p>	

APPENDIX

Navigation Path



Business Process Perspective





Phoenix End-User Training

SECTION 2:

WORKING WITH PEOPLESOFT DATA

PEOPLESOFT HRMS 7
PEOPLESOFT HUMAN RESOURCES
APRIL 2003

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A. Introduction

Working with PeopleSoft Data



Welcome to the Working with PeopleSoft Data section. This section contains the tools needed to learn the concepts and procedures involved in working with PeopleSoft data.

Goal: To acquire the skills and knowledge necessary to identify and apply the concepts of using effective date and effective sequence. To know when to insert a data row and how to use the scroll bar. To identify and apply the use of data entry modes, multiple scroll bars and to acquire a basic understanding of what makes PeopleSoft a relational database.

Participant Objectives:

At the end of this section you will be able to:

1. Insert a row of data
2. Delete a row of data
3. Describe how PeopleSoft is a relational database
4. Identify a transaction table
5. Identify a control table
6. Provide an example of a non-effective-dated record
7. Provide an example of an effective-dated record
8. List the data entry modes
9. Describe the use of scroll bars within PeopleSoft
10. Describe independent multiple scroll bars
11. Describe nested multiple scroll bars
12. Set up a new vendor

B. Business Processes

Activity	Materials
 LECTURE	 GUIDE

Relevant Business Processes:

- HR0490 – Promotion
- HR0410 – Criteria Based Increase
- HR0660 – Transfer Out to a Different Company
- HR0557 – Drivers License Data
- AP005 – Enter a 1099 Vendor Information

C. Exercises

Exercise 1– Use Effective Dating

Effective Dating

Allows you to look at, maintain, analyze, and report on past, current, and future information. PeopleSoft maintains a complete chronological history of all data and tables, whether you changed them two years ago or want changes to go into effect two months from now. Effective dates are used to compare panels and tables to ensure that the drop-down list boxes throughout the system list only the data that is valid as of the effective date on the panel in which you are working. The job data panel group contains effective dated rows. Inserting a row in a panel is usually associated with effective dates. When inserting effective dated rows of data, you are actually building a history of information. This allows PeopleSoft to store multiple rows of job data in an employee record. When you retrieve a record to update, PeopleSoft makes a copy of the most current file for you to modify then stores the new modified row along with the record in the relevant table.

Key Points for Effective Dating:

- Personal and Employment Records do not contain effective dated rows.
- Job Data panel group contain effective dated rows.
- Vendor Location panel may contain effective dated rows.
- Many prompt tables contain effective dates.
- Prompt tables with effective dates also contain effective status (active or inactive).

Data Entry Mode

The data entry modes are Add, Update/Display, and Update/Display All. When performing multiple data entries, using the toolbar to select the data entry mode will save repeated navigation steps. When the data entry mode is accessed from the toolbar a search dialog box will display and enable you to select the next record easily. When navigating to a panel or panel group that contains effective dated rows; the system will prompt you to select a data entry mode. To view all data rows in an effective dated panel or panel group Update/ Display All should be selected. If the data entry mode is not selected the system will default to Update Display. When navigating to a panel or panel group where only current data is stored Update/Display is the default data entry mode. Add inserts a new row of information into the database. For example, when you hire a new employee who is not in the Phoenix System, you will add a new row of data to the tables where employee data is stored. Another example of the add data entry mode is when your company purchase a new vehicle, and it has not been added in the system as an asset, you will add a new row of data to the tables in which asset data is stored.

Exercise 1 (continued)

Scenario: Janet Green is being promoted to a more senior job. She will receive \$100 per pay period for the promotion. Your goal is to enter the information correctly.

Step 1	Select: Use → Job Data → Job Data 1 → Update/Display All
Expected Results:	The search dialog box displays

Step 2	Enter the following search criteria: EmplID: 403000XX Click: OK (Replace XX with the number assigned to you by your instructor.)
Expected Results:	The Job Data 1 panel displays

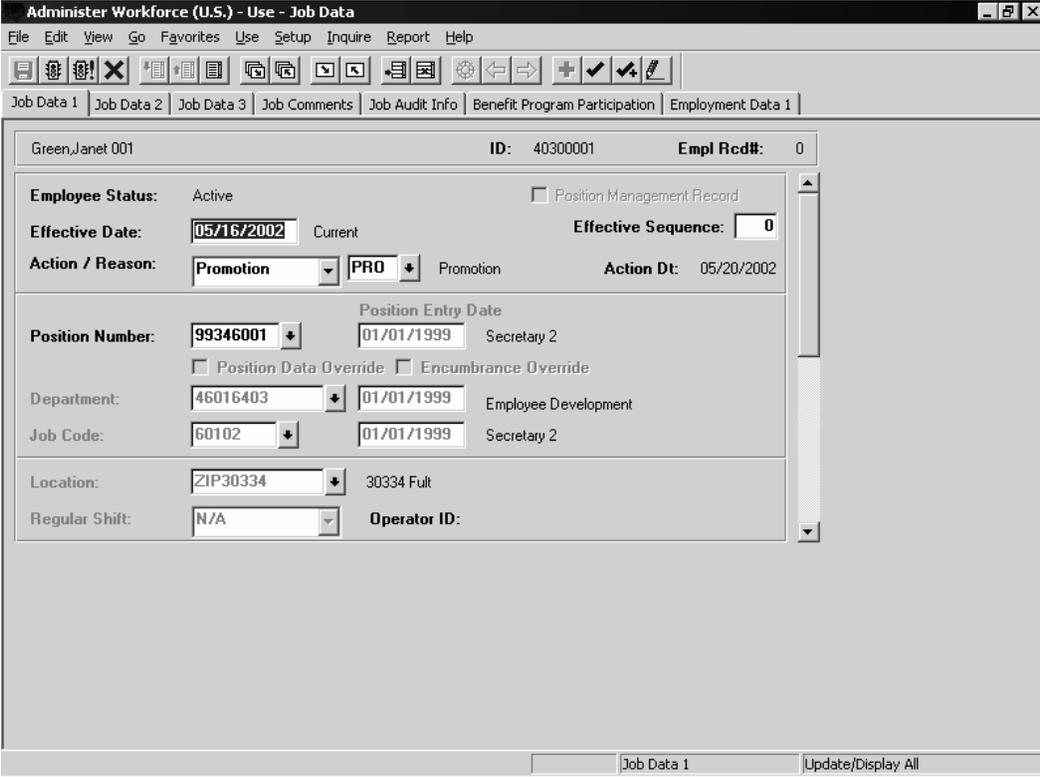
Exercise 1 (continued)

Place the cursor in the Effective Date field or click on the Scroll Bar before inserting a new row of data.

<p>Step 3</p>	<p>Click:  to insert a new effective dated row.</p> <p>Enter or select the following:</p> <p>Effective Date: _____</p> <p>Action: Promotion</p> <p>Reason: PRO</p> <p>Tab out of the field once data is entered or selected.</p>
<p>Expected Results:</p>	<p>Correct data entry</p>

<p>Step 4</p>	<p>Click:  to proceed to the Job Data 3 panel</p> <p>Change Amount: \$100.</p> <p>Review data entry for accuracy.</p> <p>Click:  to save.</p>
<p>Expected Results:</p>	<p>Correct data entry Data entry is saved</p>

Exercise 1 (continued)

<p>Check Results</p>	
<p>Step 5</p>	<p>Compare your Job Data 1 panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the appropriate topics in the online Library and consult your Instructor.</p>

Exercise 1 (continued)

<p>Check Results</p>	
<p>Step 6</p>	<p>Compare your Job Data 3 panel to the panel shown below.</p>
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the appropriate topics in the online Library and consult your Instructor.</p>

Exercise completed.

Exercise 2 - Use Effective Sequencing

Effective Sequencing

Effective sequence allows you to distinguish between two actions that have the same effective date. To distinguish between the actions, an effective date sequence code is used. If two actions with the same effective date are entered, an indication must be made as to which action should process first. The sequence code field defaults to "0" for the first action and reason code entered. For each subsequent action entered, with the same effective date, the effective sequence code field must increase numerically. Effective Sequencing allows you to control Phoenix processing and will ensure that your business requirements are met.

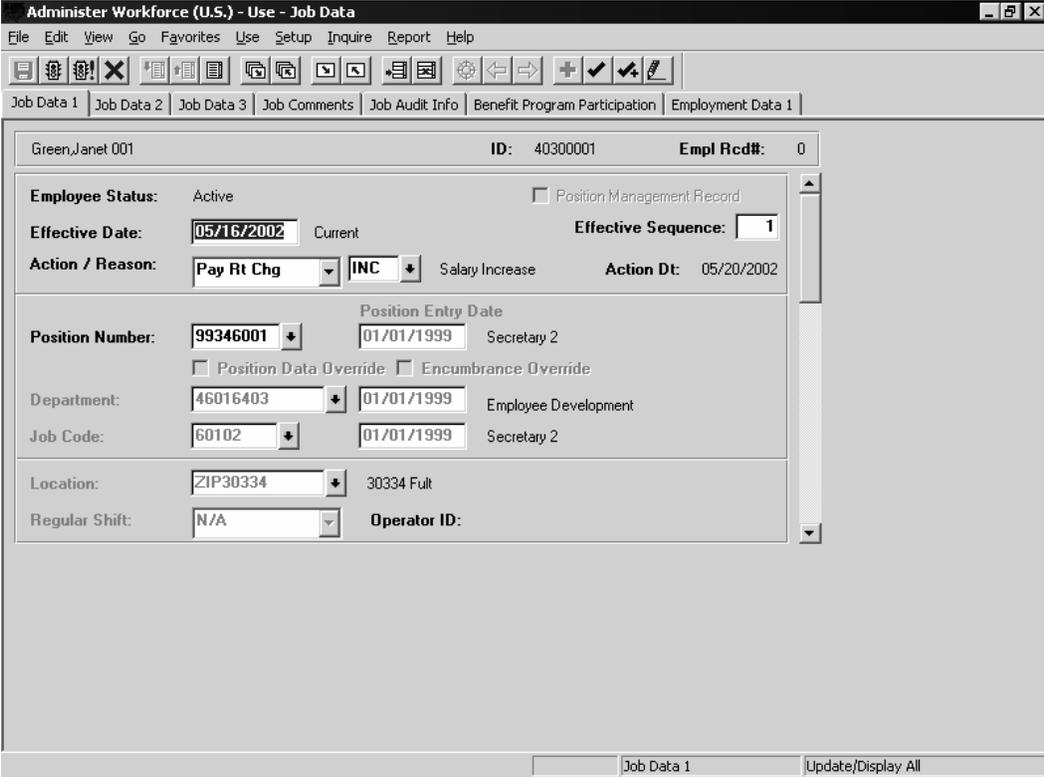
Transaction Table

A transaction table is accessed whenever data is viewed and entered in PeopleSoft. Transaction tables are the actual panels. The Personal Data panel group, Job Data panel group, and the Vendor Information panel group are examples of a transaction table. A transaction table allows access to a control table.

Control Table

A control table is a specific type table used in PeopleSoft to store standard information in one place in the database. When entering data, the control table allows for easy update, it avoids duplication of data entry, and will maintain the integrity of the data stored in the system. The data stored in a control table is usually standard pre-determined business information. Some examples of pre-determined business information are the codes used by your organization to identify the abbreviations used for countries, the County codes used in Personal Data to identify a particular geographical location, the Action/Reason used to identify a process in Job Data, the User Classification codes on the SIC Codes and User Types panel, and the codes for identifying the Classification of a vendor on the Identifying Information panel. When a code is entered or selected the system will check in the respective control table for accuracy.

Exercise 2 (continued)

<p>Check Results</p>	
<p>Step 4</p>	<p>Compare your Job Data 1 panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the appropriate topics in the online Library and consult your Instructor.</p>

Exercise 2 (continued)

<p>Check Results</p>	
<p>Step 5</p>	<p>Compare your Job Data 3 panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the appropriate topics in the online Library and consult your Instructor.</p>

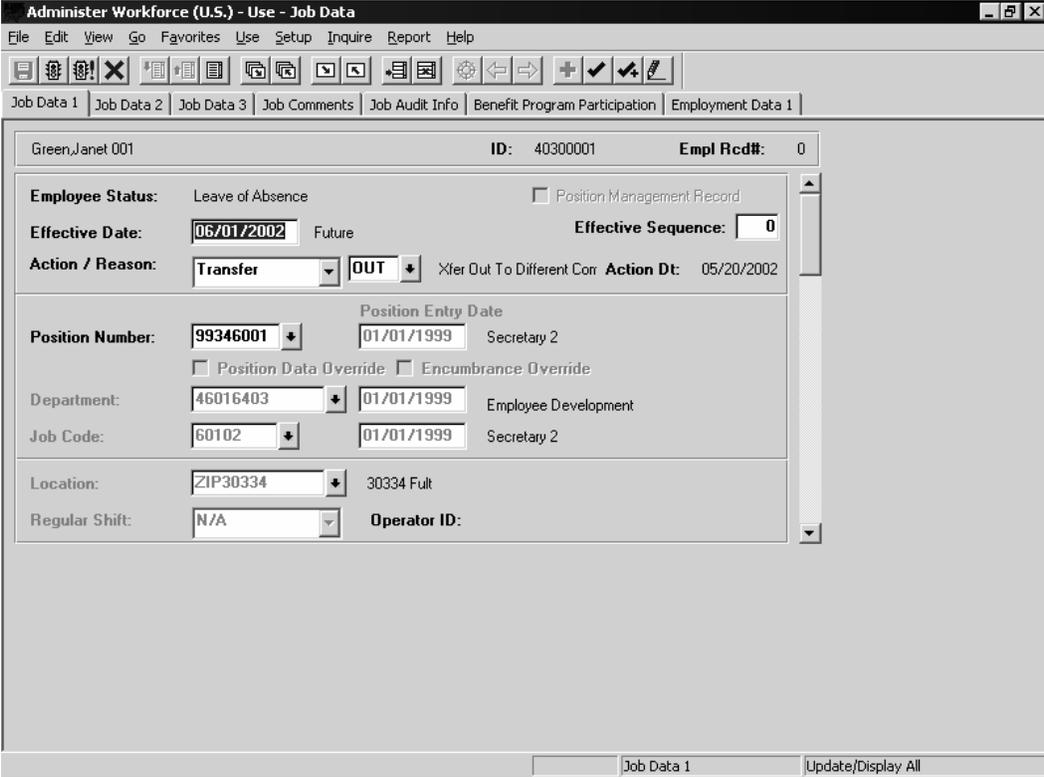
Exercise 2 (continued)

<p>Step 6</p>	<p>You have just learned that the employee will transfer out of your company. Enter the transfer using a <u>future</u> date.</p> <p>Click on Job Data 1, and insert a new data row</p> <p>Effective Date _____ (Future Date) Action: Transfer Reason: Out</p>
<p>Expected Results:</p>	<p>Correct data entry.</p>

<p>Step 7</p>	<p>Review data entry for accuracy. Click:  to save.</p>
<p>Expected Results:</p>	<p>Data entry is saved.</p>

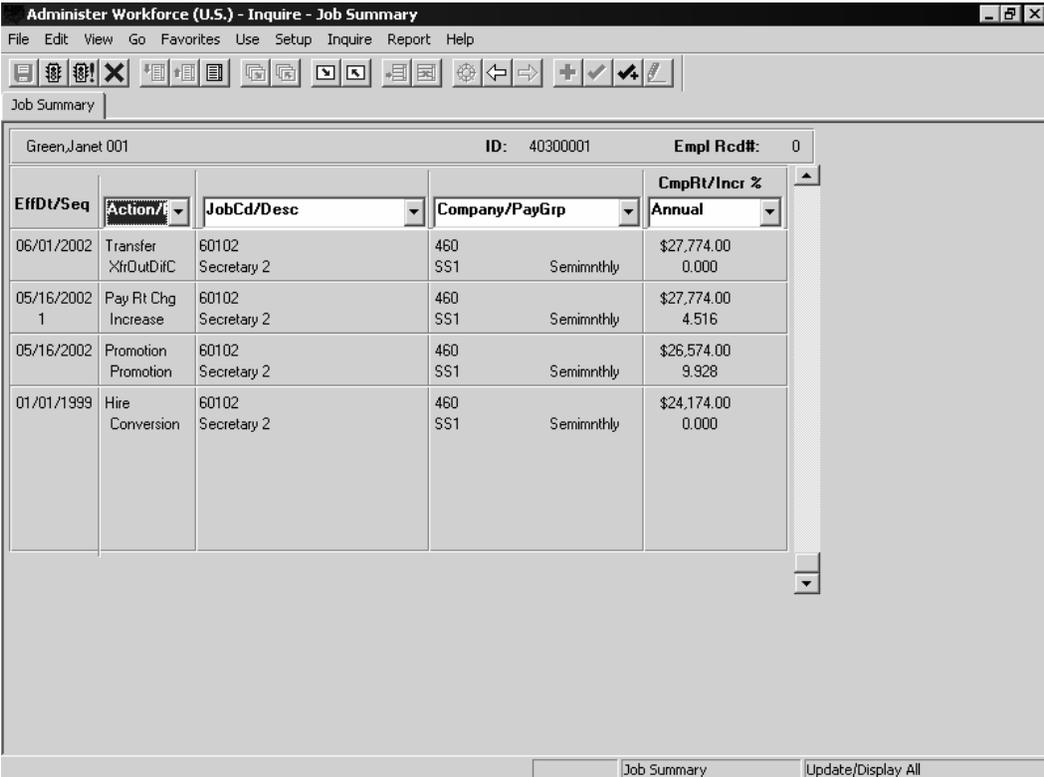
<p>Step 8</p>	<p>Click on the Scroll Bar to view the data entered.</p>
<p>Expected Results:</p>	<p>Multiple rows of data are displayed</p>

Exercise 2 (continued)

<p>Check Results</p>	
<p>Step 9</p>	<p>Compare your Job Data 1 panel with the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the appropriate topics in the online Library and consult your Instructor.</p>

Exercise 2 (continued)

Step 10	Select: Inquire → Job Summary Change Status to <i>Action/Reason</i> .
Expected Results:	The Job Summary panel displays.

Check Results																										
Step 11	Compare your Job Summary panel with the panel shown below.  <table border="1" data-bbox="381 913 1169 1333"> <thead> <tr> <th>EffDt/Seq</th> <th>Action/Reason</th> <th>JobCd/Desc</th> <th>Company/PayGrp</th> <th>CmpRt/Incr %</th> </tr> </thead> <tbody> <tr> <td>06/01/2002</td> <td>Transfer XfrOutDiffC</td> <td>60102 Secretary 2</td> <td>460 SS1 Semimnthly</td> <td>\$27,774.00 0.000</td> </tr> <tr> <td>05/16/2002 1</td> <td>Pay Rt Chg Increase</td> <td>60102 Secretary 2</td> <td>460 SS1 Semimnthly</td> <td>\$27,774.00 4.516</td> </tr> <tr> <td>05/16/2002</td> <td>Promotion Promotion</td> <td>60102 Secretary 2</td> <td>460 SS1 Semimnthly</td> <td>\$26,574.00 9.928</td> </tr> <tr> <td>01/01/1999</td> <td>Hire Conversion</td> <td>60102 Secretary 2</td> <td>460 SS1 Semimnthly</td> <td>\$24,174.00 0.000</td> </tr> </tbody> </table>	EffDt/Seq	Action/Reason	JobCd/Desc	Company/PayGrp	CmpRt/Incr %	06/01/2002	Transfer XfrOutDiffC	60102 Secretary 2	460 SS1 Semimnthly	\$27,774.00 0.000	05/16/2002 1	Pay Rt Chg Increase	60102 Secretary 2	460 SS1 Semimnthly	\$27,774.00 4.516	05/16/2002	Promotion Promotion	60102 Secretary 2	460 SS1 Semimnthly	\$26,574.00 9.928	01/01/1999	Hire Conversion	60102 Secretary 2	460 SS1 Semimnthly	\$24,174.00 0.000
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01/01/1999	Hire Conversion	60102 Secretary 2	460 SS1 Semimnthly	\$24,174.00 0.000																						
Expected Results:	The panel matches. Congratulations! If these elements do not match, review the appropriate topics in the online Library and consult your Instructor.																									

Exercise completed.

Exercise 3 - Use Data Entry Elements

All data entry takes place on the panel or panel group by means of edit boxes, radio buttons, drop-down list boxes, checkboxes or long edit boxes. The tab key or mouse is used to move through the data entry elements. Using the tab key to move one field at a time will ensure all required elements have been entered.

Toolbar Functions

The toolbar buttons are shortcuts to functions associated with data entry. The same functions can be accessed from the menu bar. If the button is grayed out, the associated function is not available in the panel or panel group.

The **Insert Row** icon inserts a new data row. Adding rows in a panel allows you to add additional information, rather than updating existing data.

The **Delete Row** icon deletes the current row of data. The ability to delete a row of data can depend on user authorization and the panel or panel group.

Step 1	<p>Select: Use → Driver's License Data</p> <p>Enter the following search criteria:</p> <p>EmplID: 403000XX (Janet Green)</p> <p>Click: OK</p>
Expected Results:	The Drivers License panel displays

Step 2	<p>Enter the following data:</p> <p>DL#: GA789000XX</p> <p>Country: USA (<i>drop-down list box</i>)</p> <p>Valid From/To: 1/1/2002, 07/01/2003 (<i>edit box w/formatting</i>)</p> <p>License Suspended: Checkbox on (<i>checkbox</i>)</p> <p>Comments: Add a line of text (<i>long edit box</i>)</p> <p>State: GA (<i>drop-down list box</i>)</p> <p>License Type: Truck (<i>radio button</i>)</p>
Expected Results:	Successful practice of data entry using various data entry elements

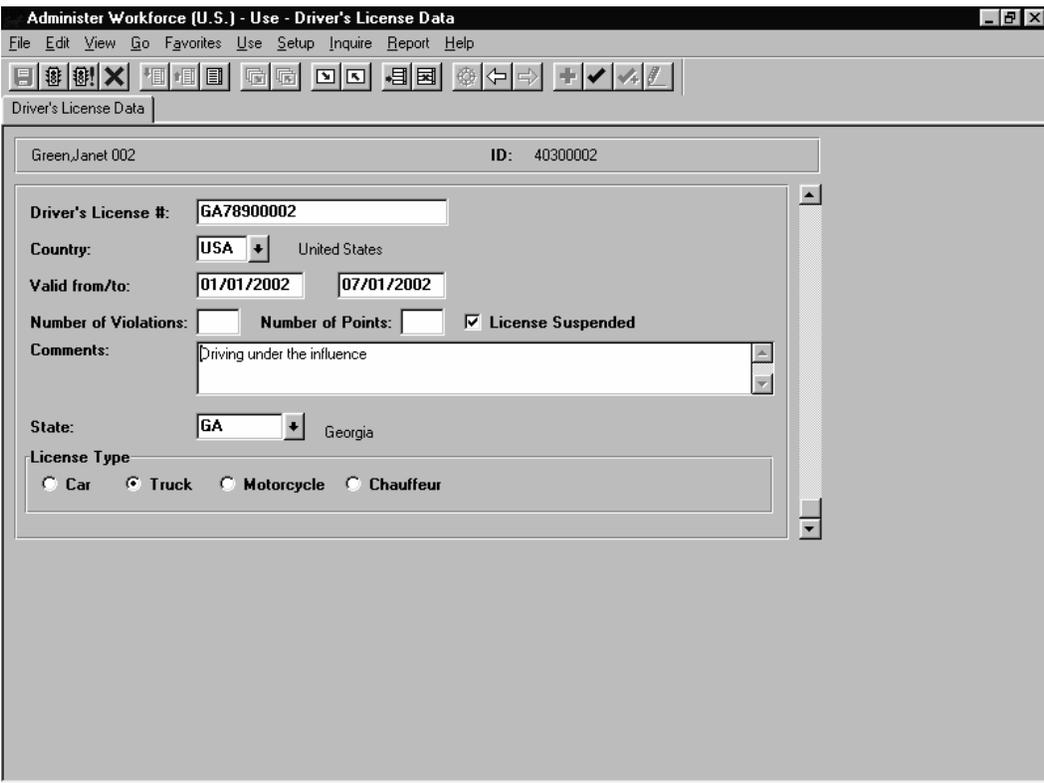
Exercise 3 (continued)

<p>Step 3</p>	<p>Click  to insert a row of driver's license data. (or, F7)</p> <p>Enter the following information:</p> <p>Driver's License #: GA123456XX Country: USA Valid From/To: 01/01/2002, 01/01/2004 License Suspended: Checkbox on Comments: Add a line of text State: GA License Type: Car</p>
<p>Expected Results:</p>	<p>Correct data entry</p>

<p>Step 4</p>	<p>Click on the associated scroll bar to view the two rows of available Driver's License data.</p>
<p>Expected Results:</p>	<p>To view rows of data</p>

<p>Step 5</p>	<p>Click  (or, F8) to delete the second row of Driver's License data entered.</p> <p>When the warning dialog box displays, Click OK or Delete</p> <p>Review data entry for accuracy. Click:  to save.</p>
<p>Expected Results:</p>	<p>A row of driver's license data is deleted and the panel closes</p>

Exercise 3 (continued)

<p>Check Results</p>	
<p>Step 6</p>	
<p>Expected Results:</p>	<p>The navigation path matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 4 - Enter Data using Scroll Bars

Scroll Bar

The scroll bar is used to page or scroll through additional information. If the elevator box within the scroll bar appears at the top or within the middle of the bar, more than one row of information exists in a record. Scroll bars on a panel indicate multiple rows of information in a specific category or field. The field controlled by a scroll bar is associated with only one table. Therefore, a panel with multiple scroll bars contains fields that write to multiple tables. When there are multiple scroll bars on a panel, one of two conditions exists, scroll bars are independent, or scroll bars are nested.

Independent Multiple Scroll Bars

The independent multiple scroll bars are shown visually on the panel with a box drawn around them called frames. The independent multiple scroll bars are independent and use data from different tables.

Nested Multiple Scroll Bars

The nested multiple scroll bars use data from different tables, but the data in one table is a subset of data in another table. Although different tables are being used, one table contains data that relates to the data from another table.

The Business Expense panel contains multiple scroll bars that are nested.

Step 1	Select: Go → Administer Workforce → Administer Workforce (U.S.) → Use → Business Expenses
Expected Results:	The search dialog box displays

Step 2	Enter the following search criteria: EmplID: 000006XX Click: OK
Expected Results:	The Business Expense panel displays

Exercise 4 (continued)

Step 3	<p>Enter or select the following:</p> <p>Expense Period End Date: _____</p> <p>Charge Date: 1 week prior to Expense Period End Date</p> <p>Expense Code: Airfare</p> <p>Expense Amount: 800.00</p> <p>Business purpose: Conference</p> <p>Department: Enter the number for Baldwin County DFCS</p> <p>Tab to the department number field and enter department number 127. Use the CTRL + F4 search combination, and in the search dialog box in the description field, enter the first three characters of the Department name. When the list appears scroll to locate the appropriate department number for Baldwin County DFCS.</p>
Expected Results:	Correct data entry. The total expenses and department description populates.

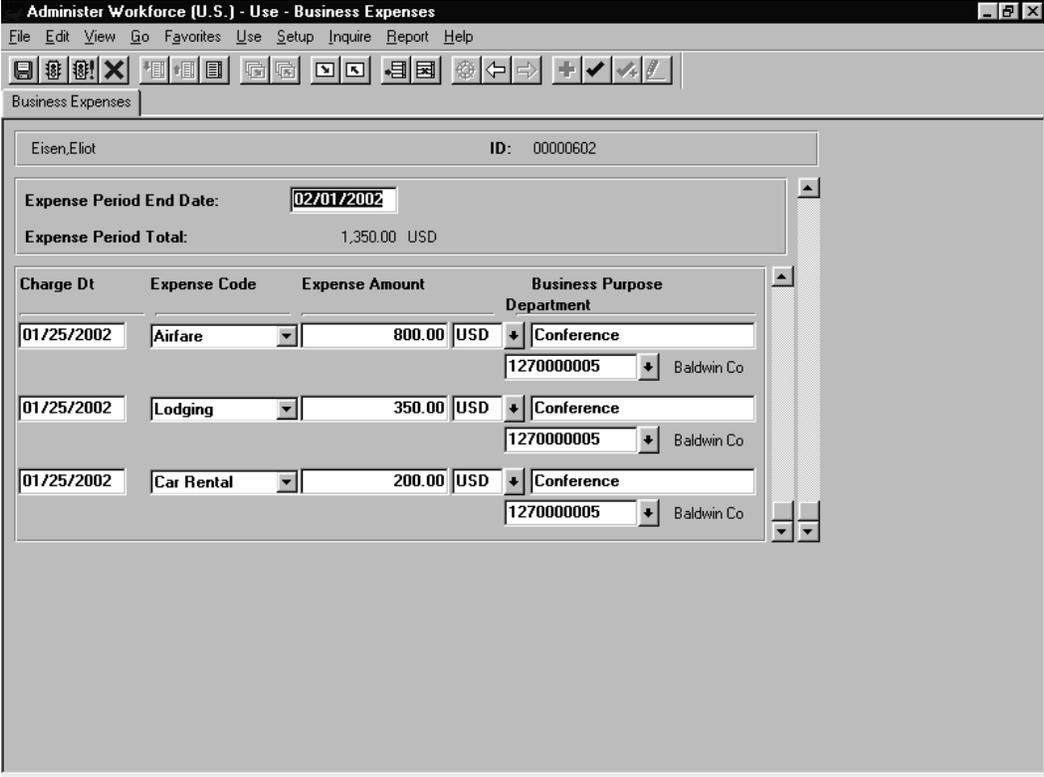
Step 4	<p>Click on the inner Scroll Bar (or in the Charge Date field).</p> <p>Click:  to insert a row.</p> <p>Enter or select the following:</p> <p>Charge Date: 1 week prior to Expense Period End Date</p> <p>Expense Code: Lodging</p> <p>Expense Amount: 350.00</p> <p>Business purpose: Conference</p> <p>Department: Enter the number for Baldwin County DFCS</p> <p>Tab to the department number field and enter department number 127. Use the CTRL + F4 search combination, and in the search dialog box in the description field, enter the first three characters of the Department name. When the list appears scroll to locate the appropriate department number for Baldwin County DFCS.</p>
Expected Results:	Correct data entry. PeopleSoft populates the total expenses and department description.

Exercise 4 (continued)

<p>Step 5</p>	<p>Click on the inner Scroll Bar (or in the Charge Date edit box).</p> <p>Click  to insert a row.</p> <p>Enter or select the following:</p> <p>Charge Date: 1 week prior to Expense Period End Date Expense Code: Car Rental Expense Amount: 200.00 Business purpose: Conference Department: Enter the number for Baldwin County DFCS</p> <p>Tab to the department number field and enter department number 127. Use the CTRL + F4 search combination, and in the search dialog box in the description field, enter the first three characters of the Department name. When the list appears scroll to locate the appropriate department number for Baldwin County DFCS.</p>
<p>Expected Results:</p>	<p>Correct data entry. PeopleSoft populates the total expenses and department description.</p>

<p>Step 6</p>	<p>Review data entry for accuracy. Click  to save.</p>
<p>Expected Results:</p>	<p>The new information is saved</p>

Exercise 4 (continued)

<p>Check Results</p>	
<p>Step 7</p>	<p>Compare your Business Expenses panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the appropriate steps in the online Library and consult your Instructor.</p>

Exercise completed.

Exercise 5 - Adding a 1099 Vendor

Scenario: *Accounting and Tax Services* is a new 1099 Vendor. Your goal is to accurately enter the company information into the statewide vendor file.

Note: 1099 data is based on Calendar Year (January – December)

Step 1	Select: Go → Administer Procurement → Maintain Vendors SELECT: USE → VENDOR INFORMATION → IDENTIFYING INFORMATION
Expected Results:	The Maintain Vendors window displays. A dialog box displays.

Step 2	Enter or select the following: SetID: STATE Vendor ID: NEXT (Default Value - <u>Do not type in this field</u>) Click: OK
Expected Results:	The Identifying Information panel displays

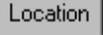
Step 3	Enter or select the following: Name 1: ACCOUNTING & TAX SERVICES CO ShortName: ACCOUNTING Classification: Supplier - Minority Status: Approved Persistence: Regular (Default value) 1099: Click on 1099 Checkbox
Expected Results:	Correct data entry Note: Status will be Unapproved in Production until approved by Security.

Exercise 5 (continued)

Step 4	<p>Click:  (next to 1099 checkbox) to proceed to the 1099 Vendor Information panel.</p> <p>Enter or select the following:</p> <p>Effective Date: Current system date (Default value) Status: Active (Default value)</p> <p>ID: 583221111 Type: Fed ID</p> <p>1099 Code: 07</p> <p>Control ID: ACCO Name 1: ACCOUNTING & TAX SERVICES Address: 1011 LYNNE CT CITY: LAWRENCEVILLE STATE: GA ZIP: 301475847</p> <p>Expected Results: Correct data entry</p>
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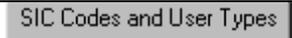
Step 5	<p>Click:  to Return to Previous Panel.</p> <p>Expected Results: The Identifying Information panel displays</p>
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Exercise 5 (continued)

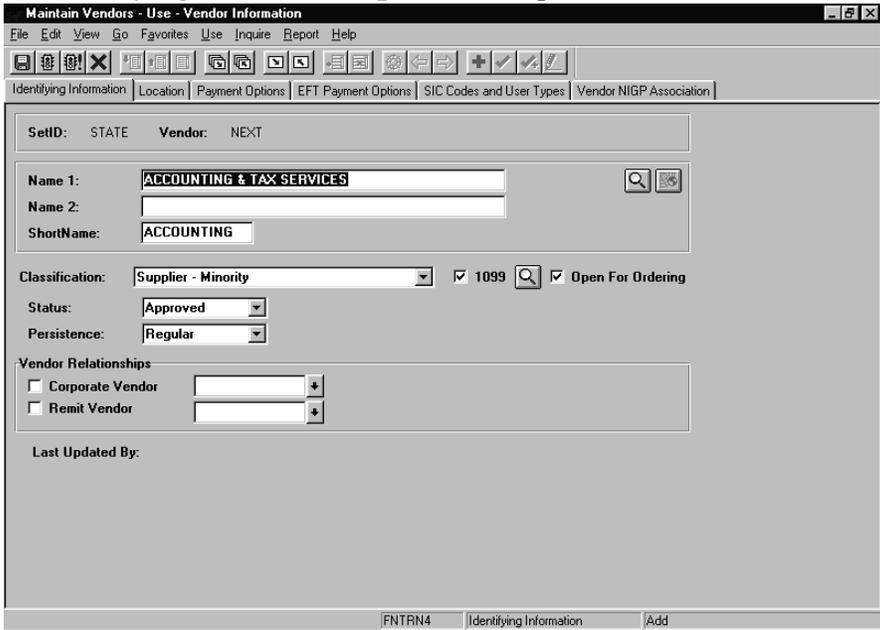
<p>Step 6</p>	<p>Click:  to proceed to the Location panel.</p> <p>Enter or select the following:</p> <p>Descr: LOCAL Effective Date: Current system date (Default value) Status: Active (Default value) Address1: 1011 LYNNE CT City/Twn1: LAWRENCEVILLE St/Prov: GA Postal: 301475847 Country: USA (Default value) Phone Main: 404-362-9999 (Enter value as shown)</p>
<p>Expected Results:</p>	<p>Correct data entry</p>

<p>Step 7</p>	<p>Place the cursor in the Descr field.</p> <p>Click:  to insert another location.</p> <p>Enter or select the following:</p> <p>Descr: REMIT TO Default: Click the <u>Remitting</u> checkbox <i>ON</i></p> <p>Effective Date: Current system date (Default value) Status: Active (Default value) Address1: 555 GLENWOOD AVE City/Twn1: DECATUR St/Prov: GA Postal: 30033 Country: USA (Default value) Phone Main: 404-867-5555</p>
<p>Expected Results:</p>	<p>Correct data entry</p>

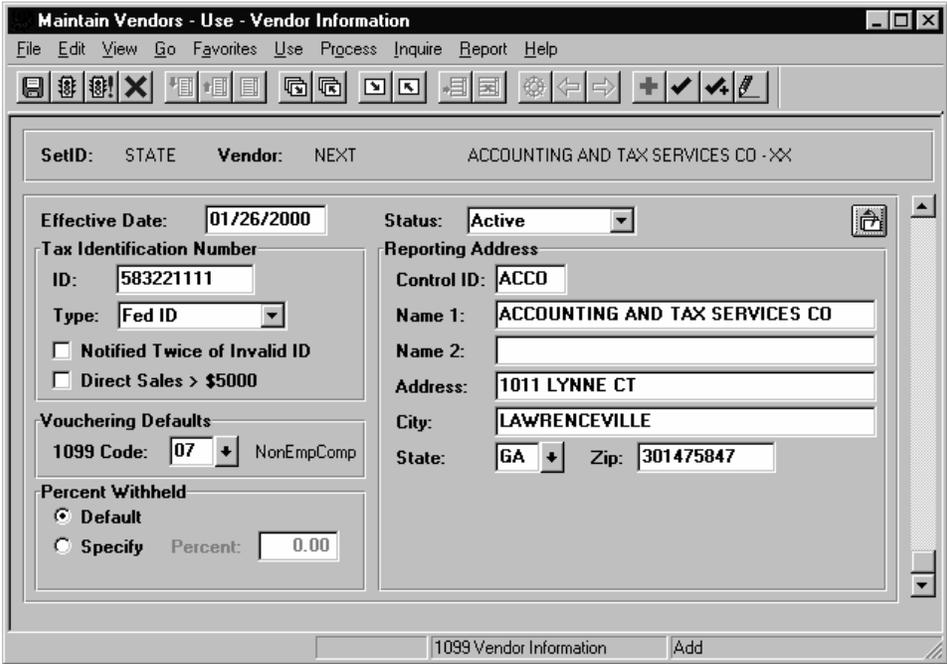
Exercise 5 (continued)

Step 8	<p>Click:  to proceed to the SIC Codes and User Types panel</p> <p>In the User Classification section of the panel</p> <p>Select: Minority – Asian American</p> <p>Click:  to save</p>
Expected Results:	Correct data entry

Check Results	
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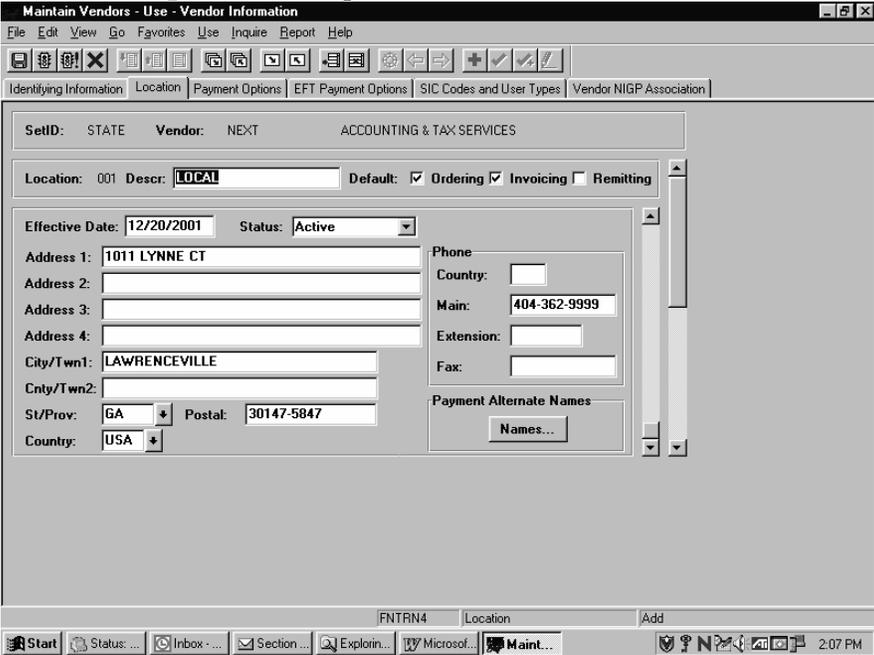
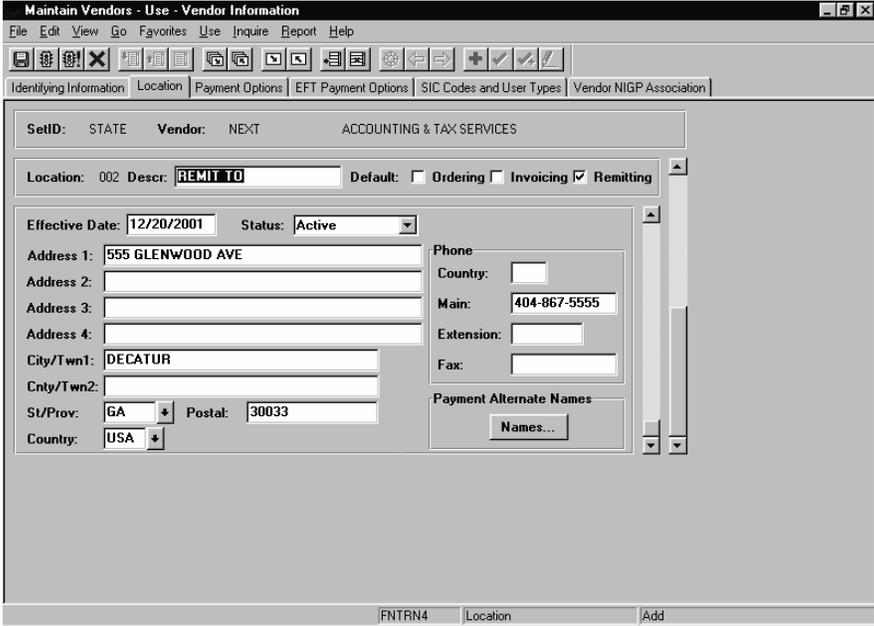
Step 9	<p>Click: </p> <p>Compare Identifying Information panel to the panel shown below:</p>  <p>Note: The Vendor number may vary from the number shown here.</p>
Expected Results:	Correct Data Entry

Exercise 5 (continued)

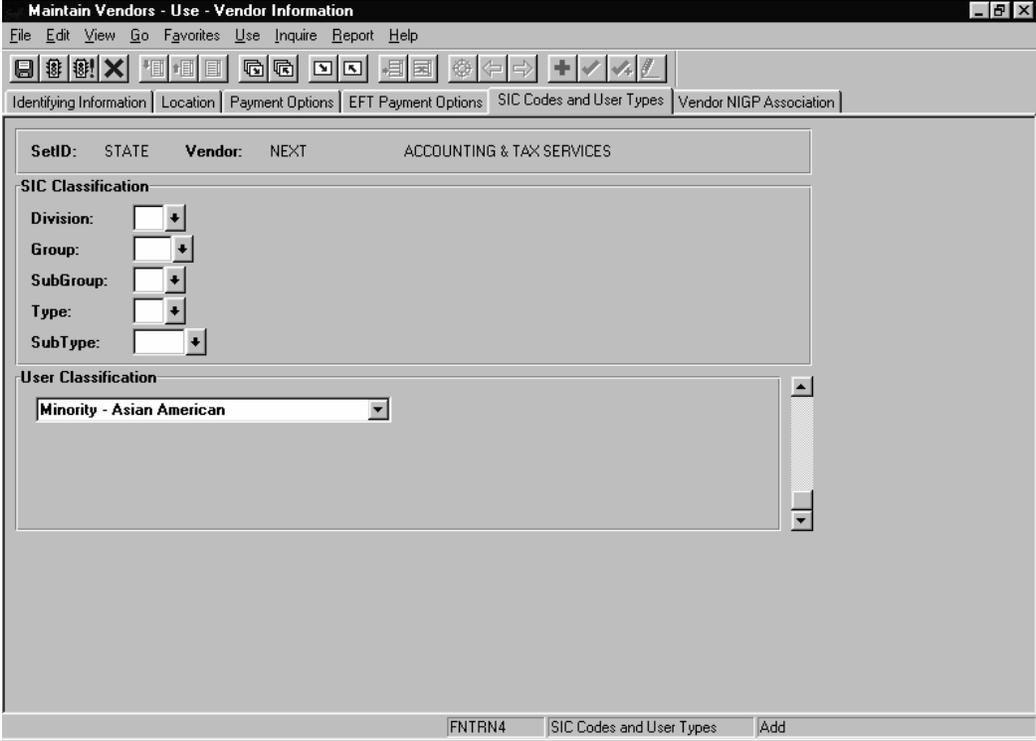
<p>Check Results</p>	
<p>Step 10</p>	<p>If the panel matches:</p> <p>Click:  1099 Information button to proceed to the 1099 Vendor Information panel.</p> <p>Compare 1099 Vendor Information panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>If these elements do not match, review the steps and consult the Instructor. Note: The Vendor number may vary from the number shown here.</p>

<p>Step 11</p>	<p>If the panel matches</p> <p>Click:  to proceed to the Identifying Information panel.</p>
<p>Expected Results:</p>	<p>The Identifying Information panel displays The Location panel displays</p>

Exercise 5 (continued)

<p>Check Results</p>	
<p>Step 12</p>	<p>Click: Location to proceed to the Location panel.</p> <p>Compare Location panels to the panels shown below:</p>  
<p>Expected Results:</p>	<p>If these elements do not match, review the steps and consult the Instructor. Note: The Vendor number may vary from the number shown here.</p>

Exercise 5 (continued)

<p>Check Results</p>	
<p>Step 13</p>	<p>Click: SIC Codes and User Types to proceed to the SIC Codes and User Types panel.</p> <p>Compare SIC Codes and User Types panel to the panel shown below:</p> 
<p>Expected Results:</p>	<p>If these elements do not match, review the steps and consult the Instructor. Note: The Vendor number may vary from the number shown here.</p> <p>The panel matches. Congratulations!</p>

Exercise completed.

D. Summary and Review

Activity	Materials	
 LECTURE	 GUIDE	 REVIEW

Objectives review:

1. Insert a row of data
2. Delete a row of data
3. Describe how PeopleSoft is a relational database
4. Identify a transaction table
5. Identify a control table
6. Provide an example of a non-effective-dated record
7. Provide an example of an effective-dated record
8. List the data entry modes
9. Describe the use of scroll bars
10. Describe independent multiple scroll bars
11. Describe nested multiple scroll bars
12. Set up a new vendor.

D. Summary and Review (continued)

Discuss the following questions:

1. What are the benefits of a relational database?
2. What are some examples of a Transaction Table?
3. What are some examples of a Control Table?
4. What are the benefits of effective dating?
5. What does the word “**NEXT**” mean and when should you change it?
6. Why do some panels not provide a choice for selecting a data entry mode?
7. What are three ways to insert a row?
8. What are three ways to delete a row of data?
9. What does the <**Tab**> key do?
10. What does the <**Enter**> key do?
11. Why do you insert rows of data?
12. How does the panel indicate that there are multiple rows?
13. What is the difference between a radio button and a checkbox?

D. Summary and Review (continued)**Matching Game**

- | | |
|--|-----------------------|
| _____ Data that is not effective dated | a) Job Data |
| _____ A method to maintain and analyze past, future and current data | b) Update/Display All |
| _____ Use this data entry mode to _____ a record | c) scroll bars |
| _____ Default data entry mode for non effective dated data | d) Country Code field |
| _____ Use _____ to view additional rows of data on a panel. | e) Effective Dating |
| _____ Use this data entry mode to view history. | f) Update/Display |
| _____ An example of a drop-down list box | g) Personal Data |
| _____ Data that is effective dated | h) Add |



Phoenix End-User Training

SECTION 3:

WORKING IN THE ONLINE LIBRARY

PEOPLESOFT HRMS 7
PEOPLESOFT HUMAN RESOURCES
APRIL 2003

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A. Introduction



Using the Online Library

Welcome to Using the Online Library section. This section contains the tools needed to learn all the concepts and procedures involved in using the online library.

Goal: To acquire the skills and knowledge necessary to describe the concepts and perform the activities identified in using the online library section of the online library.

Participant Objectives: At the end of this section you will be able

1. Understand the purpose of the online Library
2. Access the online Library in the classroom
3. Understand the role of Folio in the online Library
4. Understand how the online Library is organized and formatted
5. Understand the graphic conventions used in the online Library
6. Identify various methods to search for information in the online Library
7. Search for a topic using the table of contents
8. Search for a topic using advanced Folio query
9. Search for a concept or procedure using a Folio query template
10. Navigate through the online Library using alternative methods to locate any topic

B. Business Processes

Activity	Materials
 LECTURE	 GUIDE

Use the OLL in conjunction with Business Processes

The online Library serves as an online training manual in the classroom and as an online reference guide once you return to your job. Having an online manual eliminates the need for a paper manual that often sits on the shelf and becomes out-of-date. The online Library is completely indexed and lets you quickly and easily locate the exact information you need. The online Library is modified centrally, creating one online library viewed by all users. The online Library contains the sections identified on the following page.

A. Exercises

Exercise 1 – Accessing the On-line Library

<p>Step 1</p>	
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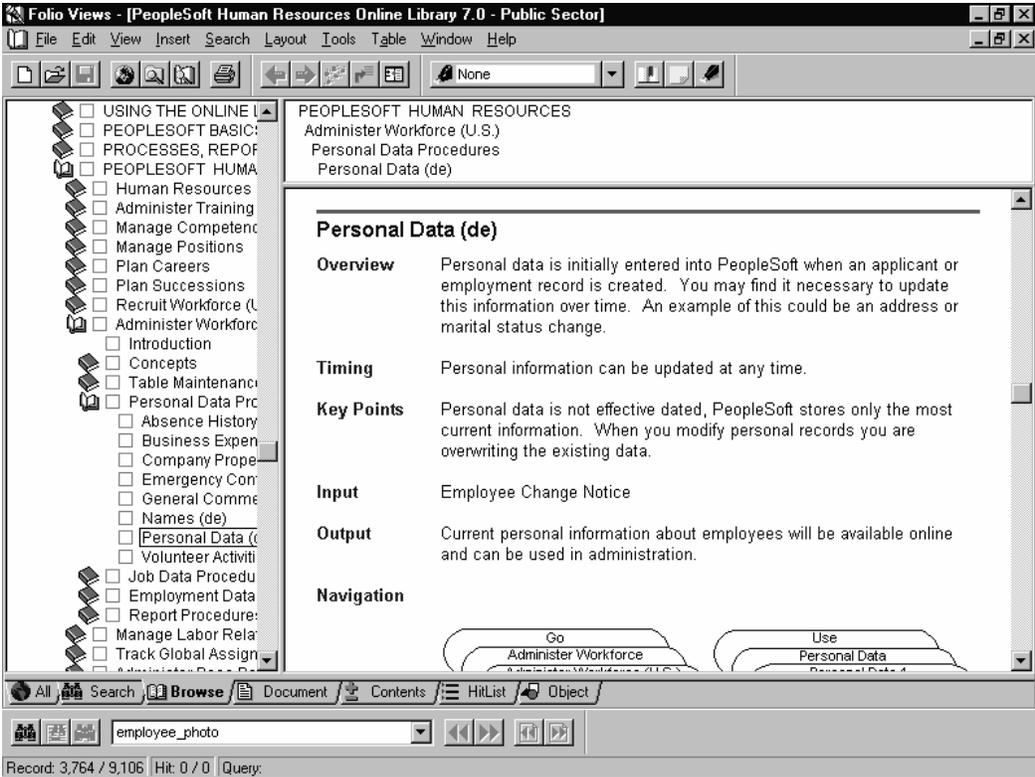
<p>Step 2</p>	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Introduction</i></p> <p>Double-click on the words <i>Introduction</i>.</p>
<p>Expected Results:</p>	<p>The Introduction section displays in the online Library.</p>

<p>Step 3</p>	<p>View the list of topics available for <i>USING THE ONLINE LIBRARY</i>:</p> <p style="text-align: center;"><i>Describe Concepts</i> <i>Perform Activities</i></p> <p style="text-align: center;">Note: Not all topics listed in the online Library are covered in class. Successful completion of this module provides you with the skills and knowledge necessary to find any information in the online Library.</p>
<p>Expected Results:</p>	<p>An understanding of the information available in the online Library for using the online Library</p>

Exercise 1 (continued)

<p>Step 4</p>	<p>The online Library contains the following sections:</p> <p>Using the online Library Provides an overview of how to use the online training and reference manual.</p> <div style="display: flex; align-items: center;"> <div style="margin-right: 20px;"> <p>Expandable Branches</p>  </div> <div> <ul style="list-style-type: none">  USING THE ONLINE LIBRARY Introduction Purpose Organization Format Graphic Conventions  Navigation  Search Topics Additional Help  PEOPLESOFT BASICS  PROCESSES, REPORTS AND QUERIES  PEOPLESOFT HUMAN RESOURCES  PEOPLESOFT PANELS </div> </div> <p>PeopleSoft Basics Describes how the PeopleSoft system operates. This section explains how to navigate through PeopleSoft and perform data entry. Key concepts are also explained.</p> <p>Processes, Reports and Queries Describes how to manually run processes and reports. This section also describes how to use Query to extract information from the PeopleSoft database and print reports.</p> <p>Phoenix Program Human Resources or Payroll or other modules Contains the end-user concepts and procedures for the Phoenix Program Human Resources application. This section describes end-user procedures in detail.</p> <p>PeopleSoft Panels Provides a snapshot of end-user panels.</p> <p>Custom Panels State of Georgia designed panels.</p> <p>Phoenix Program Workflows Business Processes</p>
<p>Expected Results:</p>	<p>An understanding of the purpose of the online Library</p>

Exercise 1 (continued)

<p>Step 5</p>	<p>Procedure Example</p> <p>The online Library enables you to continue learning long after you leave the classroom. It uses a balanced combination of text and graphics to support all learning styles. Information is presented in a consistent format. Once you are comfortable with how information and instructions are presented, you can perform any procedure in the online Library. Every procedure contains:</p> <ul style="list-style-type: none"> • Overview • Timing • Key Points • Input • Output • Navigation • Panels • Detailed Directions 
<p>Expected Results:</p>	<p>An understanding of the type of information available in the online Library</p>

Exercise 1 (continued)

Step 6	<p>The main underlying concepts and activities for USING THE ONLINE LIBRARY are listed below:</p> <ol style="list-style-type: none"> 1. Purpose 2. Organization 3. Format 4. Graphic Conventions 5. Navigation 6. Search Topics (Basics Query, Advanced Query, Query Templates)
Expected Results:	An understanding of the main concepts involved in using the online Library

Step 7	<p>Scroll down the online Library through the following concepts:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i></p> <p style="text-align: center;"><i>Purpose</i></p> <p style="text-align: center;"><i>Organization</i></p> <p style="text-align: center;"><i>Format</i></p> <p style="text-align: center;"><i>Graphic Conventions</i></p>
Expected Results:	An overall understanding of how the online Library is structured

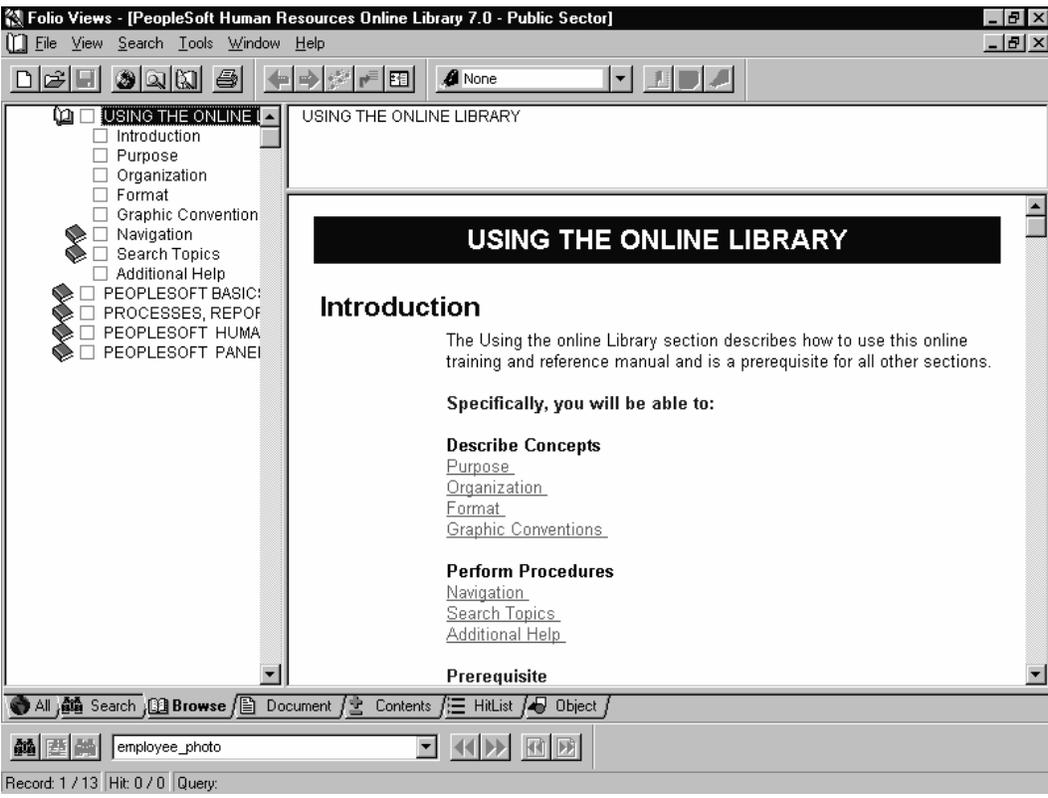
Exercise 1 (continued)

Step 8	<p>Select and review the following concepts in the online Library:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Navigation</i></p> <p>Read <i>Overview</i> and <i>Basic Terminology</i> in <i>Navigation</i></p>
Expected Results:	An introductory understanding of navigating through the online Library

Step 9	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Navigation</i> <i>Open</i> <i>Links</i> <i>Window Panes</i> <i>Tabs</i> <i>Toolbars</i> <i>Shortcut Keys</i> <i>Print</i> <i>Close</i></p>
Expected Results:	An understanding of the basics of navigation through the online Library

Step 10	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Search Topics</i></p>
Expected Results:	An understanding of searching options available in the online Library

Exercise 1 (continued)

<p>Check Results</p>	
<p>Step 11</p>	<p>Compare your panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 2 – Using the Online Library

Scenario: Find the topic *Navigation* in the online Library. Your goal is to be able to use the Table of Contents to successfully find the topic:

Online

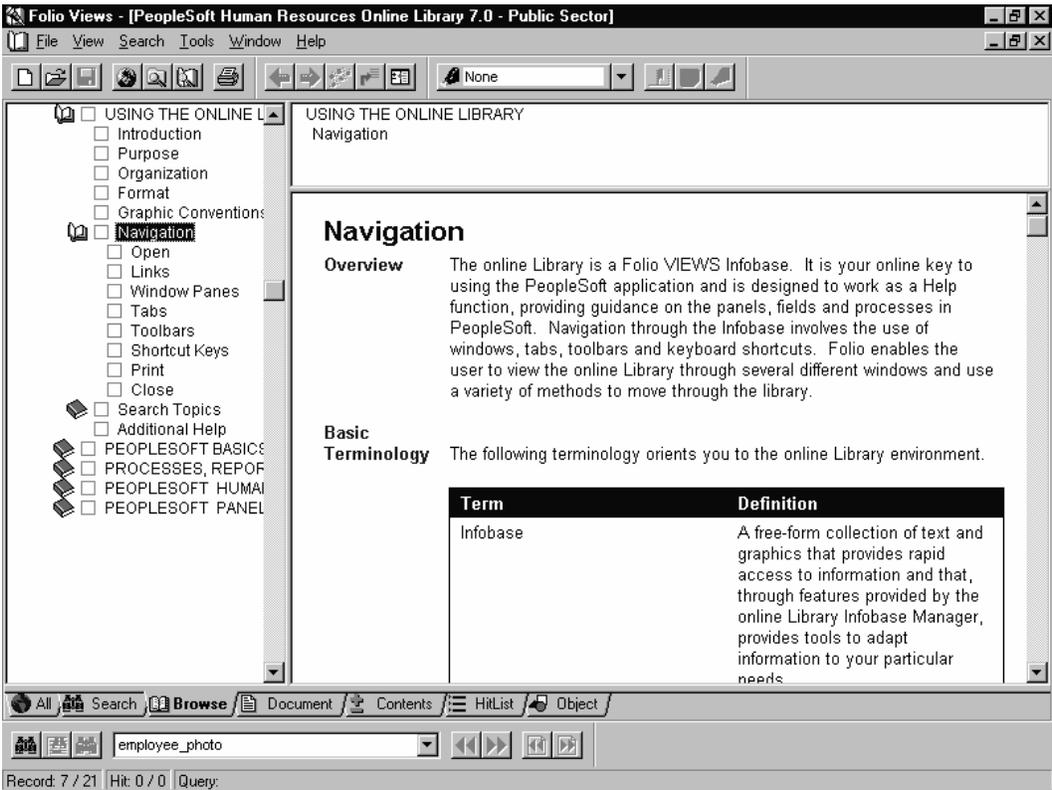
Library: *USING THE ONLINE LIBRARY*

Step 1	From the Table of Contents window in the online Library, expand the heading <i>USING THE ONLINE LIBRARY</i> .
Expected Results:	The topic subheadings are expanded and displayed.

Step 2	Locate and highlight the section on <i>Navigation</i> .
Expected Results:	The section is highlighted.

Step 3	Double-click on <i>Navigation</i> and view the information on navigation in the document window.
Expected Results:	The <i>Navigation</i> topic is displayed in the document window.

Exercise 2 (continued)

<p>Check Results</p>					
<p>Step 4</p>	<p>Compare your panel to the panel shown below.</p>  <p>The screenshot shows a web browser window titled "Folio Views - [PeopleSoft Human Resources Online Library 7.0 - Public Sector]". The interface includes a menu bar (File, View, Search, Tools, Window, Help), a toolbar, and a main content area. On the left, there is a tree view with a checked item "Navigation". The main content area displays "Navigation" with an "Overview" section and "Basic Terminology" section. The "Basic Terminology" section includes a table with two columns: "Term" and "Definition".</p> <table border="1" data-bbox="829 940 1382 1136"> <thead> <tr> <th>Term</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Infobase</td> <td>A free-form collection of text and graphics that provides rapid access to information and that, through features provided by the online Library Infobase Manager, provides tools to adapt information to your particular needs.</td> </tr> </tbody> </table> <p>At the bottom of the window, there is a status bar showing "Record: 7 / 21 Hit: 0 / 0 Query:".</p>	Term	Definition	Infobase	A free-form collection of text and graphics that provides rapid access to information and that, through features provided by the online Library Infobase Manager, provides tools to adapt information to your particular needs.
Term	Definition				
Infobase	A free-form collection of text and graphics that provides rapid access to information and that, through features provided by the online Library Infobase Manager, provides tools to adapt information to your particular needs.				
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>				

Exercise completed.

Exercise 3 - Use Jump Links to View a Topic

Scenario: Find and view information on System Structure using jump links. Your goal is to use jump links to successfully move within the online Library to find the topic:

Online

Library: *PEOPLESOFT BASICS*

Step 1	From the Table of Contents window in the online Library, expand the heading <i>PEOPLESOFT BASICS</i> .
Expected Results:	The topic subheadings are expanded and displayed.

Step 2	Double-click on the heading <i>PEOPLESOFT BASICS</i> .
Expected Results:	The Introduction text is displayed in the document window.

Step 3	Locate the jump link for <i>System Structure</i> in the document window. The text is green and underlined. Click on the jump link to view the information on the System Structure in the document window.
Expected Results:	The System Structure topic is displayed in the document window.

Exercise 3 (continued)

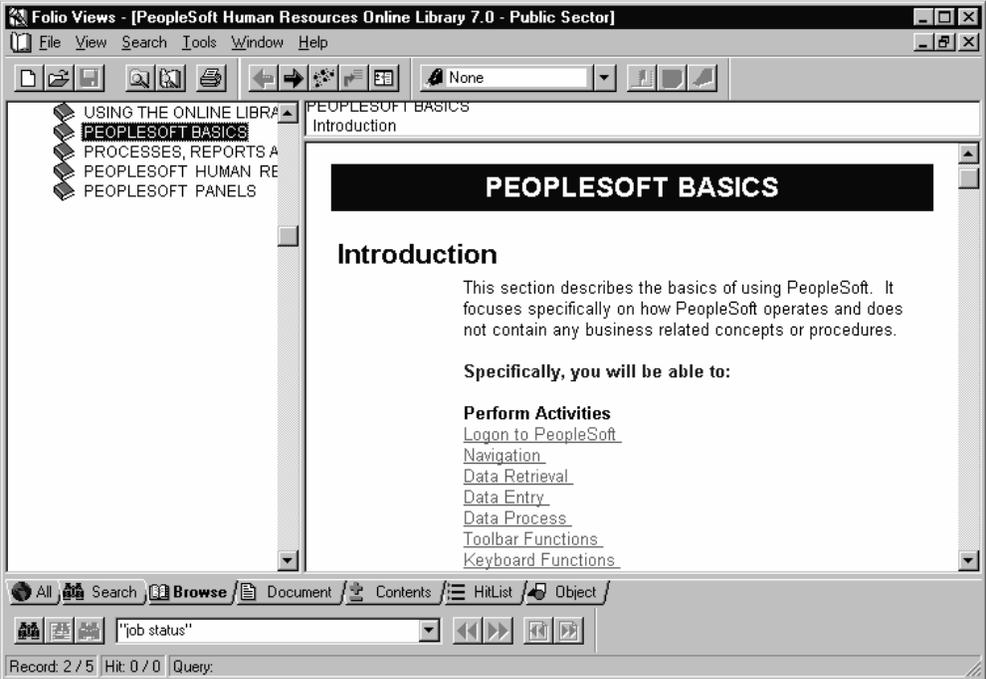
Step 4	Click the back arrow  button on the toolbar to jump back to the starting point.
Expected Results:	The section that appeared prior to the jump displays.

Step 5	Collapse the heading <i>PEOPLESOFT BASICS</i> in the Table of Contents window.
Expected Results:	The subheadings collapse.

Step 6	Click:  to display the history of jumps.
Expected Results:	The Show History window lists the sections viewed using jump links.

Step 7	Click:  to close the Show History window.
Expected Results:	The Show History window is closed.

Exercise 3 (continued)

Check Results	
Step 8	<p>Compare your panel to the panel shown below.</p> 
Expected Results:	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 4 - Search for a Topic using Folio Query

Scenario: Search for information on run process and department transfers using Folio Query. Your goal is to use Query to successfully locate information within the online Library.

Online

Library: *Search Topics*

Step 1	From the Table of Contents window in the online Library, expand the heading <i>USING THE ONLINE LIBRARY</i> .
Expected Results:	The topic subheadings are expanded and displayed.

Step 2	Locate and double-click the section on <i>Search Topics</i> .
Expected Results:	The Search Topics text is displayed in the document window.

Step 3	Review <i>Basic Query</i> , <i>Advanced Query</i> and <i>Query Templates</i> sections.
Expected Results:	The Search Topics text is displayed in the document window.

Exercise 4 (continued)

Step 4	Select: Search, Query
Expected Results:	A dialog box displays.
Step 5	Enter run process in the dialog box. Click: OK
Expected Results:	Any occurrences of either word (including word stem variations within a record) will appear highlighted in the document window. The number of query hits shows in the gray bar at the bottom of the screen. If the total number for the query exceeds 50, the top 50 queries display.
Step 6	Click on the arrow buttons  to move from hit to hit.
Expected Results:	Move from one hit to the next hit of the run process query.

Exercise 4 (continued)

Step 7	<p>Click:  (Clear Query) to cancel the current query.</p> <p>Select: Search, Advanced Query</p>
Expected Results:	A dialog box displays.

Step 8	<p>Enter run process in the dialog box.</p> <p>Click: OK</p>
Expected Results:	The number of hits, or the number of occurrences of either word within a record, displays.

Step 9	<p>Select: Search, Advanced Query</p> <p>Enter “run process” in the dialog box.</p> <p>Click: OK</p>
Expected Results:	Any occurrences of the phrase run process within a record will appear highlighted in the document window. The number of query hits shows in the gray bar at the bottom of the screen.

Exercise 4 (continued)

Step 10	Click on the arrow buttons  to move from hit to hit.
Expected Results:	Move from a hit to the next hit of the “run process” query.
Step 11	Click:  to display the history of jumps.
Expected Results:	The Show History window lists the sections viewed using jump links.
Step 12	Click:  to close the Show History window.
Expected Results:	The Show History window is closed.
Step 13	Click:  to cancel the current query.
Expected Results:	The current query cancels.
Step 14	Select: Search, Concepts and Procedures
Expected Results:	The Concepts and Procedures query template displays.
Step 15	Enter the following: dep
Expected Results:	The word wheel displays concepts and procedures that begin with “dep”.

Exercise 4 (continued)

Step 16	Double-click: department table tbl
Expected Results:	The selection box is loaded with the phrase “Department Table tbl” maintenance procedure name.

Step 17	Click: OK
Expected Results:	The Department Tables procedure displays in the document window.

Step 18	<p>Expand the Table of Contents following the query results to display the path to the procedure.</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES</i> <i>Troubleshooting Tables</i> <i>Table Maintenance Procedures</i> <i>Department Tables (tbl)</i></p>
Expected Results:	The Table of Contents path to the specific procedure displays.

Exercise 4 (continued)

<p>Check Results</p>	
<p>Step 19</p>	<p>Compare your panel to the panel shown below.</p> <p>The screenshot shows a web browser window titled 'Folio Views - [PeopleSoft Human Resources Online Library 7.0 - Public Sector]'. The main content area is titled 'PHOENIX PROGRAM HUMAN RESOURCES PROCESSES' and lists 'Troubleshooting Tables', 'Table Maintenance Procedures', and 'Department Table (tbl)'. The 'Department Table (tbl)' section contains the following information:</p> <ul style="list-style-type: none"> Overview: You can automate the list of available departments by entering them into the Department Table. Timing: The Department Table generally is accessed when a new department is created or the status of an existing one is changed. Key Points: Departments display as valid values in a drop-down list box if the code is active as of the effective date of the procedure being performed. Input: List of new departments or changes in department information Output: A current list of valid departments and their codes is available on line - for viewing purposes or in drop-down list boxes. Navigation: <ul style="list-style-type: none"> Go: Define Business Rules, Manage Human Resources (U.S.) Setup: Department Table, Add or Update/Display <p>The bottom of the screenshot shows a navigation bar with 'All', 'Search', 'Browse', 'Document', 'Contents', 'HitList', and 'Object' buttons. Below this is a search bar with the text '[Headings Heading 4,department table tbl]' and a status bar showing 'Record: 631 / 7,229 Hit: 1 / 20 Query: [Headings Heading 4,department ta] Administer Workforce (U.S.) - Inquire - Job Summary'.</p>
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 5 - Use the Table of Contents to Locate a Topic

Scenario: Find the topic Links in the online Library. Your goal is to be able to use the Table of Contents to successfully find the topic.

Online

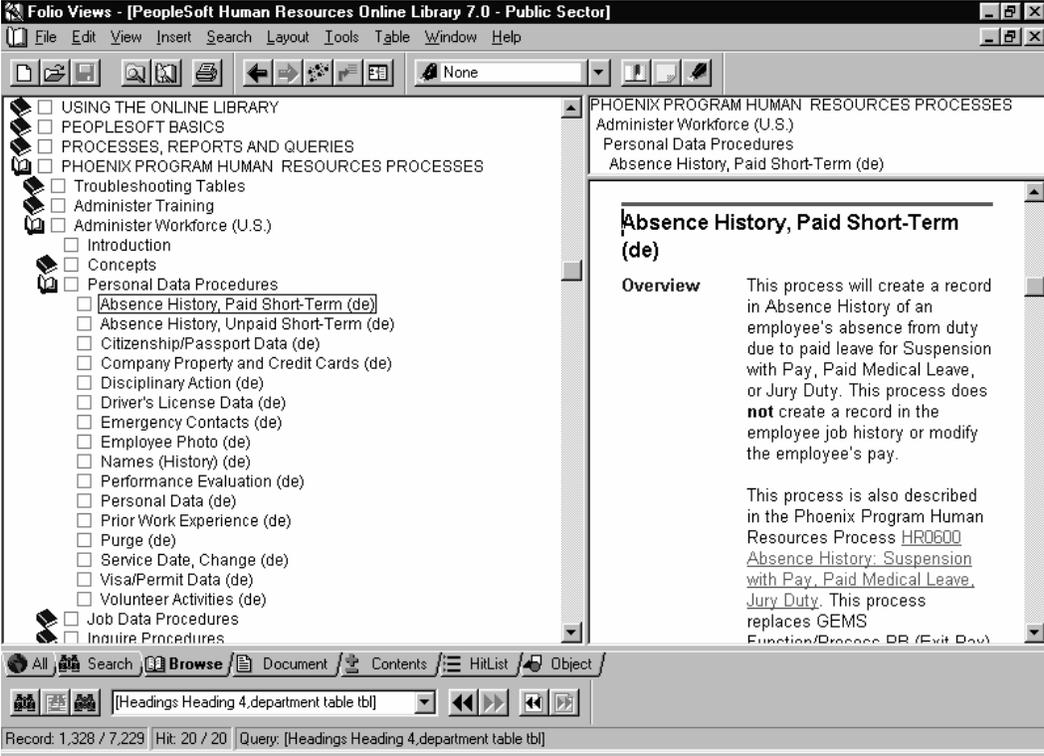
Library: *Links*

Step 1	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Navigation</i> <i>Links</i></p>
Expected Results:	The Links section displays in the online Library.

Step 2	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PEOPLESOFT BASICS</i> <i>Data Retrieval</i> <i>Searches (F4 Combinations)</i></p>
Expected Results:	The Searches (F4 Combinations) section displays in the online Library.

Step 3	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES</i> <i>Administer Workforce (U.S.)</i> <i>Personal Data Procedures</i> <i>Absence History, Paid Short-Term (de)</i></p>
Expected Results:	The Absence History, Paid Short-Term data entry procedure displays in the online Library.

Exercise 5 (continued)

<p>Check Results</p>	
<p>Step 4</p>	<p>Compare your panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 6 - Use Jump Links to View a Topic

Scenario: Find and view information on the Disciplinary Action Procedure (HR0553) using jump links. Your goal is to use jump links to successfully move within the online Library.

Online

Library: *Links*
Disciplinary Action (de)

Step 1	From the Table of Contents window in the online Library, expand down the following path: <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Navigation</i> <i>Links</i></p>
Expected Results:	The Links section displays in the online Library.

Step 2	Review <i>Links</i> in the online Library.
Expected Results:	An understanding of how to use jump links in the online Library

Step 3	From the Table of Contents window in the online Library, expand down the following path: <p style="text-align: center;"><i>PHOENIX PROGRAM HUMAN RESOURCES</i> <i>Administer Workforce (U.S.)</i> <i>Personal Data Procedures</i> <i>Disciplinary Action (de)</i></p>
Expected Results:	The Disciplinary Action data entry procedure displays in the online Library.

Exercise 6 (continued)

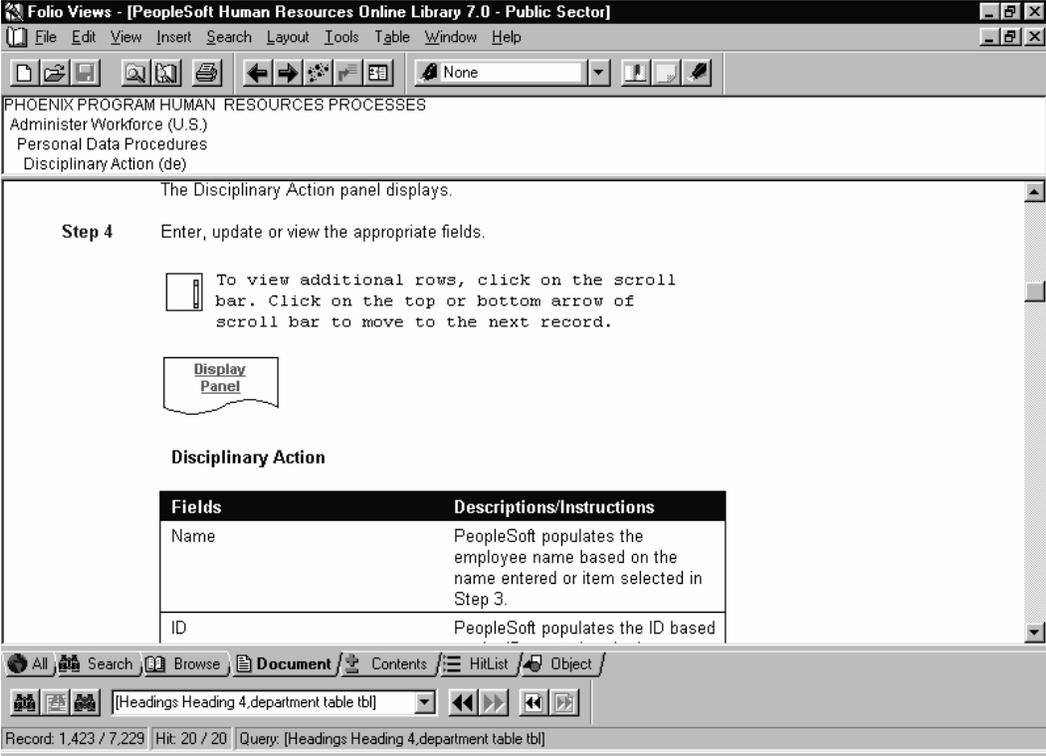
Step 4	Locate the jump link to information regarding the disciplinary action (HR0553) procedure. Click: HR0553
Expected Results:	The section that appeared prior to the jump displays.

Step 5	Click the back arrow  button on the toolbar to jump back to the starting point.
Expected Results:	The section that appeared prior to the jump displays.

Step 6	Scroll down to Step 4 in the Disciplinary Action Procedure. Click: 
Expected Results:	The Disciplinary Action panel displays in the online Library.

Step 7	Click the back arrow  button on the toolbar to jump back to the starting point.
Expected Results:	The section that appeared prior to the jump displays.

Exercise 6 (continued)

<p>Check Results</p>	
<p>Step 8</p>	<p>Compare your panel to the panel shown below.</p> 
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

Exercise 7 - Search for a Topic using Folio Query

Scenario: You need information on how to hire an employee but do not know where in the online Library the information is located. Your goal is to use Folio Query successfully to locate information within the online Library.

Online

Library: *Search Topics*

Step 1	<p>From the Table of Contents window in the online Library, expand down the following path:</p> <p style="text-align: center;"><i>USING THE ONLINE LIBRARY</i> <i>Search Topics</i> <i>Basic Query</i> <i>Advanced Query</i> <i>Custom Query</i></p>
Expected Results:	The Search Topics section displays in the online Library.

Step 2	Review <i>Basic Query</i> , <i>Advanced Query</i> , and <i>Custom Query</i> in the online Library.
Expected Results:	An understanding of how to use Folio Query to locate information in the online Library

Step 3	Click:  to collapse any expanded branches in the Table of Contents.
Expected Results:	The Table of Contents collapses.

Exercise 7 (continued)

Step 4	<p>Click:  to cancel the current query, if necessary.</p> <p>Select: Search, Advanced Query</p>
Expected Results:	A dialog box displays.

Step 5	<p>Enter driver in the dialog box.</p> <p>Click: OK</p>
Expected Results:	The Table of Contents lists the number of hits in PHOENIX PROGRAM HUMAN RESOURCES, and the first instance of the hits displays in the document window.

Step 6	<p>Expand PHOENIX PROGRAM HUMAN RESOURCES.</p> <p>Note where the largest number of hits occurs: _____</p>
Expected Results:	The number of hits per topic displays in the Table of Contents.

Step 7	<p>Expand <i>Administer Workforce (U.S.)</i>, looking for Procedures on hiring employees, using the hits from the query you performed as a guide.</p> <p>List the procedure _____</p>
Expected Results:	Procedures regarding drivers are found.

Exercise 7 (continued)

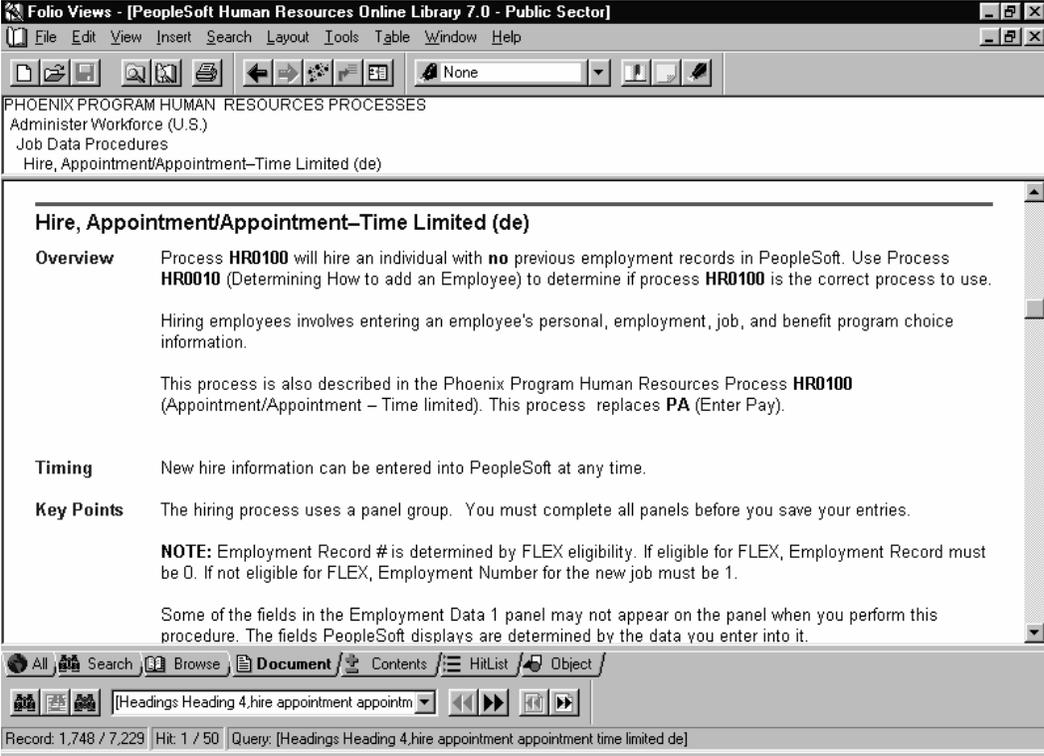
Step 8	Click:  to cancel the current query.
Expected Results:	The current query cancels.

Step 9	Select: Search, Concepts and Procedures
Expected Results:	The Concepts and Procedures query template displays.

Step 10	Enter the following: hir
Expected Results:	The word wheel displays concepts and procedures that begin with “hir”.

Step 11	Enter or select: Hire Appointment
Expected Results:	The Hire Appointment data entry procedure displays in the document window.

Exercise 7 (continued)

<p>Check Results</p>	
<p>Step 12</p>	<p>Compare your panel to the panel shown below.</p>  <p>Hire, Appointment/Appointment-Time Limited (de)</p> <p>Overview Process HR0100 will hire an individual with no previous employment records in PeopleSoft. Use Process HR0010 (Determining How to add an Employee) to determine if process HR0100 is the correct process to use.</p> <p>Hiring employees involves entering an employee's personal, employment, job, and benefit program choice information.</p> <p>This process is also described in the Phoenix Program Human Resources Process HR0100 (Appointment/Appointment - Time limited). This process replaces PA (Enter Pay).</p> <p>Timing New hire information can be entered into PeopleSoft at any time.</p> <p>Key Points The hiring process uses a panel group. You must complete all panels before you save your entries.</p> <p>NOTE: Employment Record # is determined by FLEX eligibility. If eligible for FLEX, Employment Record must be 0. If not eligible for FLEX, Employment Number for the new job must be 1.</p> <p>Some of the fields in the Employment Data 1 panel may not appear on the panel when you perform this procedure. The fields PeopleSoft displays are determined by the data you enter into it.</p>
<p>Expected Results:</p>	<p>The panel matches. Congratulations! If these elements do not match, review the steps and consult your Instructor.</p>

Exercise completed.

D. Summary and Review

Activity	Materials		
 LECTURE	 GUIDE	 FLIPCHART	 REVIEW

Objectives review:

1. Describe the purpose of the online Library
2. Access the online Library in the classroom
3. Understand the role of Folio in the online Library
4. Understand how the online Library is organized and formatted
5. Understand the graphic conventions used in the online Library
6. Identify various methods to search for information in the online Library
7. Search for a topic using the table of contents
8. Search for a topic using advanced Folio query
9. Search for a concept or procedure using a Folio query template
10. Navigate through the online Library using alternative methods to locate any topic

Discuss the following questions:

1. What sections contain introductory information?
2. What sections contain Concepts and Procedures?
3. What is an expandable branch? Where do you use them?
4. What is an example of a Folio Query and its purpose?
5. When would you use the Table of Contents to search for a topic?
6. When would you use an Advanced Query to search for a topic?
7. When would you use a Folio Custom Query to search for a topic?

Introduction to PeopleSoft



Congratulations! You have just completed the Introduction to PeopleSoft Module. This module contains the tools needed to present all the concepts and procedures involved in navigating through the PeopleSoft panels.

Goal: To acquire the skills and knowledge necessary to describe concepts and perform activities identified in the Navigating through PeopleSoft, PeopleSoft Basics, and using the online library sections of the Online Library.

Participant Objectives: You should now be able to:

1. Navigate through PeopleSoft
2. Work with data in PeopleSoft
3. Describe PeopleSoft key concepts
4. Record employee personal data
5. Record employee employment data
6. Record employee job data
7. Use the online Library.
8. Navigate through the online Library to locate Phoenix Program processes and procedures.