

PeopleSoft and Employee Self Service Overview

HR Self Service

The implementation of PeopleSoft enables the University to eliminate certain paperwork and allow employees to access and update their personal information online in the database.

The following functions can be accessed directly by an employee through Employee Self Service:

- Maintain Personal Information:
 - Personal Information
 - Emergency Contacts
 - Personal Phone Numbers
 - Home/Mailing Addresses
 - Email Address
- View Checks and History:
 - View Paychecks
 - View Compensation History
- Maintain Payroll Information:
 - Maintain Federal W4 Info
 - Maintain Direct Deposit Info

Navigation

The PeopleSoft system is accessed via the Internet Explorer (IE) browser on your desktop. Once you are logged in to the database you will continue to see IE navigation buttons such as BACK, HOME, and REFRESH, but these buttons should not be used for navigating in PeopleSoft.

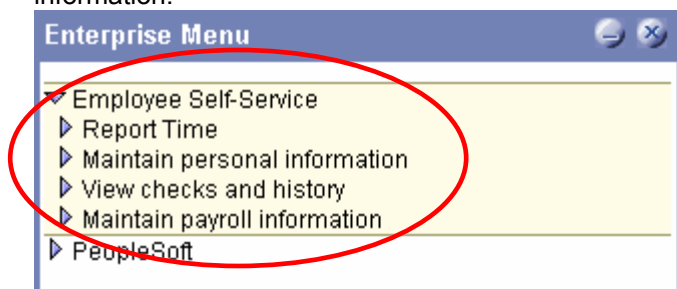
To move through the PeopleSoft screens you should use the menu bar on the left hand side of your Home or entry screen. The options listed along the left hand side of the main screen are blue. Just like a web site, these blue words indicate that these are links that will open up a new page of additional options. The menu options that appear on the main page will reflect the roles and responsibilities that you have in the system.

Main Menu

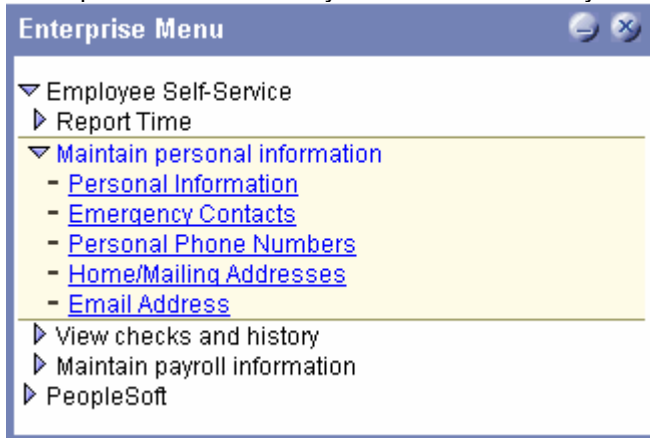
When you log into PeopleSoft the Main Menu bar will appear along the left hand side of your screen. It lists the broad categories of tasks that you can access in PeopleSoft. Each category has a right pointing arrow ▶ in front of it indicating that there are more menu options within the category.



You can click on the Employee Self-Service link to see the additional menu options in this category. This is where employees will go to enter their time, manage certain personal, tax and payroll-related information.



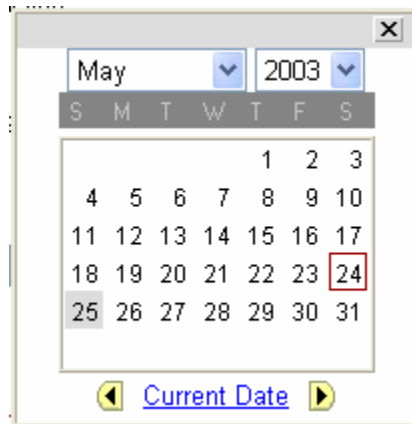
To drill down to specific Self Service options, for example Maintain Personal Information, click the topic. When you see a link with a dash in front of it that means that this is a task, and that there are no sub-topics. Select the task you want to conduct by clicking the underlined link:



Data Entry

Dates

Dates can be entered in the date field in mm/dd/yyyy format or selected using the calendar icon  next to the date field. Once you click on the calendar icon a calendar will appear:

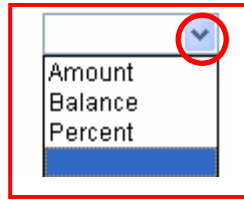


The current date will be highlighted. Use the drop down arrows to navigate to prior or future months and years. Select a date by clicking on the date in the calendar. When you select a date PeopleSoft will return you to the data entry screen in which you are working. If you do not want to use this option once the calendar appears, click the x to close the calendar window.

Drop downs

When entering data in PeopleSoft you have the option to enter the type the data directly into a text box or look up the value you want to enter. If the value is part of a short list (less than 20 values), then you will see a downward facing triangle to the right of the field, indicating a drop down list of values. You can click on the triangle to view the list of possible values and select one from the list by clicking on the name.

***Deposit Type:**



Lookups

If the value you are looking for is part of a longer list of values, then there will be a magnifying glass indicating a lookup function to the right of the blank field. For example a lookup is available on the State field:

State:  Maine


Click on the magnifying glass to look up a value. This will bring you to a separate window that lets you refine your search by entering criteria. You are brought to a basic lookup function that enables you to enter one criteria for the data you are looking up. Once you enter criteria or leave the fields blank, click the **Lookup** button to initiate the search.

Search By: 
State:
Lookup **Cancel** [Advanced Lookup](#)

You can view all the states in the pick list by clicking **Lookup**

To limit the search, enter part of the state name or the first letter and then click **Lookup**, as in the following example:

[Home](#) > [HR Self Service](#) > [Employee](#) > [Tasks](#) > **Home and Mailing Address**

Search By: 
State:
Lookup **Cancel** [Advanced Lookup](#)

Search Results

View All First  1-9 of 9  Last

State	Description
MA	Massachusetts
MD	Maryland
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
MX	Mexico

Entering M in the state field before clicking **Lookup** returns all states starting with M.

Clicking **Cancel** will end your search and return you to the data entry screen.

If you click the Advanced Lookup link it will bring you to a screen where you can enter criteria for more than one field.

[Home](#) > [HR Self Service](#) > [Employee](#) > [Tasks](#) > **Home and Mailing Address**

Country: USA

State:

Description:

Lookup **Clear** **Cancel** [Basic Lookup](#)

Signing Out

Remember that when you are logged on to PeopleSoft you can access confidential and personal. The HR Self Service menu enables you to view your paycheck, enter your time and change your personal data in the system. When you complete your work in the system always sign out by clicking on the Sign Out icon in the upper right hand corner of your PeopleSoft screen. It is recommended that you sign out before closing your browser.