PeopleSoft 101
Bridging the Gap from Banner to PeopleSoft

HR/Payroll Data Migration
Welcome!

Course Objective
Participants will get a solid foundation in the PeopleSoft system, including common system terminology, system roles, process flows, and basic information for working in PeopleSoft. This course is intended to acclimate users to working in PeopleSoft.
Goals – Business Unit Training

- Building a Foundation
- Terminology Alignment
- PeopleSoft System Basics
What we’ll be covering in this course…

- Background
- Terminology Alignment and Commonly Used Terms
- Roles & Responsibilities
  - Human Resources Transactions
  - Commitment Accounting
  - Time & Labor
  - Absence Reporting
- System Basics
  - Accessing PeopleSoft
  - Logging In
  - Navigating the System
  - Employee Self-Service (ESS)
# Guide to Training - *Symbols*

<table>
<thead>
<tr>
<th><strong>KEY POINT</strong></th>
<th>Be on the lookout for this lightbulb, which indicates an important piece of information.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COMMON ERROR</strong></td>
<td>This symbol indicates a common pitfall or error to watch out for. Proceed with caution!</td>
</tr>
<tr>
<td><strong>TIPS &amp; TRICKS</strong></td>
<td>Keep this in mind to make life easier down the road!</td>
</tr>
<tr>
<td><strong>UNDER CONSTRUCTION</strong></td>
<td>This area is still in progress – changes may occur!</td>
</tr>
</tbody>
</table>
Background

2013

Rutgers University and UMDNJ Integration

Evaluation of Systems

2016

Strategic Plan

Negotiation of Contracts Completed

Decision to Integrate Systems

HR/Payroll Migration
HR/Payroll Migration Roadmap

Where We Started

Current State
- Banner
- PeopleSoft

Integration (Interim)
- One HR System (PeopleSoft)

Future State
- BPR*
- HCM Cloud (Oracle)

*Business Process Redesign
PeopleSoft 101

TERMINOLOGY ALIGNMENT & COMMONLY USED TERMS
Commonly Used Terms

Vocabulary is important. As we proceed through the process of migrating Banner records into PeopleSoft, we know that unless we are all on the same page, communicating with each other is going to be like comparing apples to oranges.

This section will seek to translate some commonly-used terms, and help users navigate the differences in terminology.
Terminology Alignment

**Banner**

PCLS Code
(Position Classification System)

**PeopleSoft**

Job Code
**Banner**
A-Number

**PeopleSoft**
Employee ID
(Empl ID)
**Banner**
Z-Org

**PeopleSoft**
Department / Org ID
**PeopleSoft Query**

An ad-hoc end user reporting tool, through which precise information can be extracted by using visual representations from the PeopleSoft database. It allows the user to build ad-hoc queries and also run queries shared by other users.

Queries can be as simple or complex as necessary; they can be one-time queries or queries used repeatedly.
**Hourly (Non-Exempt):** These employees are known as per diem and overtime eligible. This group includes B2 employees.

**Salaried (Non-Exempt):** These employees follow standard hours of pay and are overtime eligible. This group includes B1, B2, and B3 employees.

**Salaried (Exempt):** These employees follow standard hours of pay and are not overtime eligible. This group includes B1, B2, and B3 employees.
Preparer: The person designated within the PeopleSoft system as responsible for entering data within the three modules (HCM, Time & Labor, Commitment Accounting).

Approver: The person designated within the PeopleSoft system as responsible for validating and approving data entry. If the Approver finds an error, they need to send it back to the Preparer to correct in the system.

FOR THE PURPOSE OF SEPARATION OF DUTIES, ONE INDIVIDUAL CANNOT HOLD BOTH THE PREPARER AND APPROVER ROLES.
**Time Reporting Codes (TRCs)**

Time Reporting Codes are a way to collect hours or amounts for compensation, and are used to generate pay.

Examples:
- HREG – Hourly regular (Hours worked by Casual, Student and Trades employees)
- WKDPM - WEEKDAY NIGHTS (11 -7am) L2
**Reported Time:** Unedited time entered by a Timekeeper/Time Preparer
**Combination Codes (Combo Codes)**

A combination code is a system generated number used in Commitment Accounting that represents the General Ledger Chart of Account string.
Human Capital Management (HCM)

The HCM application is a customized version of Oracle’s PeopleSoft product, and supports human resource transactions, payroll, time entry, time approval, and commitment accounting activities.
Template-Based Hire (TBH)

An electronic process that allows HR Preparers to enter and submit data into HCM to hire a new employee (New Hire) or add another assignment to an existing employee’s record in the system.
Absence Reporting

A system through which paid time off usage is recorded and employees may view balances available to them. Absence Reporting is accessible when employees or administrators log into PeopleSoft.

NOTE – This is a system to record paid time off absences, not to approve or pay them. The employee is responsible for scheduling time with their supervisor / notifying their supervisor when an unplanned absence occurs. The employee or supervisor would let the Absence Reporting administrator know to record the absence in the system.

For paid time off recorded in Absence Reporting, no notation is required on the electronic timesheet for time corresponding to the employee’s regular rate of pay. However, if an employee receives additional compensation for working during a holiday, for example, it would be recorded on the timesheet using a TRC.
PeopleSoft 101

ROLES & RESPONSIBILITIES
Roles & Responsibilities

Who does what? How does data go from Point A to Point B?

The PeopleSoft system has electronic workflows and routing for employee transactions, time entry and approval, and absence reporting, but it’s important to understand the department’s role in the process, and how data entered translates to actions performed within the system.
HR Transaction Process Responsibilities

Proposed Paper-Based Transactions to Transition Banner Units to PeopleSoft

**Business Units**

- **Business Unit Originator**
  - Records transaction details on paper form

- **Business Unit Approver**
  - Validates and approves info on Paper Forms

- **Budget Approver**
  - Ensures funding is available for HR Transaction

**Central HR**

- **HR Preparer**
  - Electronically enters form details in PeopleSoft

- **HR Approver**
  - Validates and approves entry in PeopleSoft

- **HCM/ALR**
  - Final Audit and applies transaction in system

**Budget Approver**

- Electronically enters Commitment Accounting Employee Charging Instructions if different from department default account
Commitment Accounting Process Responsibilities

Employee Transactions that Impact a Department’s Budget

New Hire

Transfer

Reallocation

Commitment Accounting Preparer

- Enters or edits Employee Charging Instructions (ECI) if different from Dept. Default Account
- Completes Salary and Wage Redistribution and Justification (SWRJ) form if change cannot be processed through ECI

Commitment Accounting Approver

- Validates and Approves Employee Charging Instructions (ECI) and Salary and Wage Redistribution and Justification (SWRJ) form

Central Payroll

- Provides final audit on ECI and SWRJ
- Runs processes to update the changes that have been made

Terminology Alignment
Labor Distributions → Commitment Accounting
Time Entry & Approval Process Responsibilities

No Web Clock or Kronos*

Non-Exempt Hourly Employees – Report all time worked
Non-Exempt Salaried Employees – Report Additional Hours Beyond Standard Work Week

**Employee**
- Communicates time to T&L Preparer

**Time & Labor Preparer**
- Enters time in the system (either punch-ins or elapsed timesheet)
- Sets charging instructions (only when funding is different from standard salary charging instructions for position)
- Makes corrections (up to 90 days)

**Time & Labor Approver**
- Validates and approves time and charging instructions

**Central Payroll**
- Provides final audit on time entered and charging instructions
- Applies time to system, converting time worked to time paid

*Kronos is only being used by specific departments (i.e. Facilities, Dining, Public Safety)
Time Entry & Approval Process Responsibilities

*Using Web Clock or Kronos*

Non-Exempt Hourly Employees – *Report all time worked*
Non-Exempt Salaried Employees – *Report Additional Hours Beyond Standard Work Week*

**Employee**
- Punches in with Web Clock or Kronos (interfaces which record time directly into the system)

**Time & Labor Preparer**
- Corrects time in system (either punch-ins or elapsed timesheet – up to 90 days)
- Sets charging instructions (only when funding is different from standard salary charging instructions for position)

**Time & Labor Approver**
- Validates and approves time and charging instructions

**Central Payroll**
- Provides final audit on time entered and charging instructions
- Applies time to system, converting time worked to time paid

* Kronos is only being used by specific departments (i.e. Facilities, Dining, Public Safety)
Absence Reporting Process Responsibilities

All Staff Employees Who Are Eligible for Paid Time Off

Employee / Supervisor

- Employee responsible for requesting time off from Supervisor
- PTO approval process determined by department – not completed within the system
- Once use of PTO is approved, request is communicated to Absence Reporting Admin (by either Employee or Supervisor)

Absence Reporting Administrator

- Enters PTO into Absence Reporting
- If Employee does not have sufficient PTO balances to accommodate request, Absence Reporting Admin communicates back to Supervisor to advise

Paid time off is a term and condition of employment, and is extended to employees based on negotiating agreement and University policy.
PeopleSoft 101

SYSTEM BASICS
System Basics

All of this project context, process discussion, roles, responsibilities, and terminology is important, but won’t amount to much if I can never remember how to log into the system!

In this section, we’ll go over some of the building blocks to working within the PeopleSoft system, including getting system access, logging in, navigating the system and Employee Self Service.
## Context - *Hierarchy and Roles*

<table>
<thead>
<tr>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great-Grandparent</td>
<td>Grandparent</td>
<td>Parent</td>
<td>Child</td>
</tr>
<tr>
<td>Parent</td>
<td>Child</td>
<td>Parent</td>
<td>Child</td>
</tr>
<tr>
<td>Child</td>
<td>Child</td>
<td>Grandparent</td>
<td>Parent</td>
</tr>
<tr>
<td>Parent</td>
<td>Child</td>
<td>Child</td>
<td>Child</td>
</tr>
</tbody>
</table>

- Preparers/Approvers from a *parent* department will have the same access to all *child* departments.
- Child departments may leverage the parent relationship to assist in the event of absences, timely entry of hours worked, etc…
Setting Up System Access

• Initial department access established by HR/Payroll Migration Team at time of Banner to PeopleSoft migration

• RIAS HCM Access Request Form – submit to University Human Resources: http://uhr.rutgers.edu/rbhs-hcm-access-request

• Online access request – most RBHS schools / units are set up to request access through their Finance office.

Shutting Off System Access

PeopleSoft automatically shuts down a user’s access when the following takes place:

• Promotion/Title Change
• Transfer/Change in Org. Assigned/Reorganization
• Separation/Termination
http://my.rutgers.edu
Login using your NetID. You will be logged out automatically after 30 minutes of inactivity.
NetID Authentication

NetID: bw0539
Password: ●●●●●●●●●●●●

Ensure proper security — keep your password a secret

Authentication Type: Default

Notify me before logging me into other sites.

To protect your privacy, please logout and exit your browser when you are done accessing services that require auth.
Tab to Access Employee Self Service
Employee Self Service Functions

Users can access the following information in their employee file and request changes if needed:

1. **Personal Information**: Can edit contact information; emergency contacts, home address, telephone number(s), demographic info

2. **Payroll and Compensation Information**: can edit direct deposit, W-4 deductions, can view W-2 form, tax withholdings, etc.

3. **Benefit Information**: can view current benefit selections, absence balances, etc.
PeopleSoft Menu

My Recent Paychecks
Review your last 5 available paychecks below.
Select the date of the paycheck you would like to review

<table>
<thead>
<tr>
<th>Check Date</th>
<th>Paycheck Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-07-08</td>
<td>2738843</td>
</tr>
<tr>
<td>2016-06-24</td>
<td>2720018</td>
</tr>
<tr>
<td>2016-06-10</td>
<td>2701529</td>
</tr>
<tr>
<td>2016-05-27</td>
<td>933390</td>
</tr>
<tr>
<td>2016-05-26</td>
<td>933353</td>
</tr>
</tbody>
</table>

View Full Paycheck Self Service Page

My Absence Balances

<table>
<thead>
<tr>
<th>Absence Type</th>
<th>Days Remaining as of Prior Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>26.50</td>
</tr>
<tr>
<td>Sick</td>
<td>178.75</td>
</tr>
<tr>
<td>Administrative Leave</td>
<td>1.00</td>
</tr>
<tr>
<td>Personal Holiday</td>
<td>2.00</td>
</tr>
<tr>
<td>Paid Leave Bank</td>
<td>4.00</td>
</tr>
</tbody>
</table>

View Absence Balances and Details Self Service Page
What kind of support will I receive after training?

- Buddy System
- Post-Go-Live Support
  - Help Desk
  - War Room
  - Video Tutorials
  - Office Hours
  - Training
- Office Hours & Open Work Sessions
- Email Communications
  - Post-Training Tips
  - Cornerstone Newsletter
  - Other Milestones, important news, etc.

What to Expect Next
How You Can Be Involved

• **Stay Connected**
  - Cornerstone Website
  - Roadshows
  - Newsletters
  - Treasurer’s Town Hall

• **Send questions, suggestions and feedback to:** cornerstone@rutgers.edu

• **Reach out to a Business Advisory or School/ Unit Representative Group member**
  - Visit Cornerstone for contacts

*cornerstone.rutgers.edu*
Additional Resources

• RIAS Website and Learning Resources
  – http://rias.rutgers.edu

• Rutgers Payroll Services Website
  – http://payroll.rutgers.edu

• Rutgers University Human Resources (UHR) Website
  – http://uhr.rutgers.edu

• UHR Website – HR Definitions
  – http://uhr.rutgers.edu/glossary

• HCM Blog Website
  – http://hcmblog.rutgers.edu

• Cornerstone Projects Website
  – http://cornerstone.rutgers.edu
If you have any questions or feedback, please send to info@hr.rutgers.edu