PeopleSoft ePerformance - Navigation Basics



1.0 SCOPE

1.1 This work procedure provides an introduction to the PeopleSoft ePerformance system and the basic navigation to a principal/manager's Performance Documents. Included in this work procedure will be a description of certain key employee information that may be helpful to the manager when completing the employee evaluations.

2.0 RESPONSIBILITY

2.1 All school principals and department managers are responsible for validating the employee data that is being displayed and for notifying Human Capital Initiatives if any of the data is incorrect and needs to be updated.

3.0 APPROVAL AUTHORITY

3.1 None.

4.0 DEFINITIONS

- 4.1 **ePerformance:** the PeopleSoft module used to complete and manage all District personnel evaluations beginning with the 2011-2012 school year.
- 4.2 **Performance document:** PeopleSoft performance management documents, such as an employee's Evaluation or Formal Observation document.
- 4.3 **Direct report:** any employee under the direct supervision of a manager or supervisor.

PeopleSoft ePerformance – Navigation Basics



5.0 PROCEDURE

5.1 Log in to PeopleSoft. This example shows the PeopleSoft Portal page as the starting point as there are numerous ways to access the PeopleSoft Portal (e.g. from SharePoint, directly from a web browser window, etc.). The PeopleSoft Portal page is shown below. *Note:* your home page is likely to be different from anyone else's home page, but the common PeopleSoft functionality should be visible. Specifically, you should see Manager Self Service on your Enterprise Menu.

Welcome!	Roger Roadrunner		Thu, Mar 8, 12		
Every chil	d is a work of art. Create a mas	terpiece.	Home	Add to My Links	<u>Sign out</u>
My Page Human Resources Financials ersonalize Content Layout		Search:	>	My Links Sele	ect One:
Enterprise Menu	🖄 🖃 Main Menu	¢ – × E	nterprise Portal News		2 Z - I
Commitment Control Constance Contracts Perocurement Sants Employee Self Service Project Costing RCSD Reporting Purchasing PeropleSoft	Commitment Control Define or maintain budgets, budget- exceptions Review Budget Activities Customer Contracts Access customer contracts.	check, and review budgets and	2011 W-2 is available online The 2011 W-2 is now available o 403(b) 457 Plans 403(b) 457 Plans Universal Avail Allowable Contribution Limits Fir View All Articles and Sections	lability Notice Plus 20	
Vorkist Reporting Tools - <u>Change My Password</u> My Personalizations - <u>My Dictionary</u>	eProcurement Set up eProcurement; manage or app POs. Create Requisition Manage Requisitions Receive terms	prove eProcurement requisitions or			

5.2 Click on the Human Resources tab. A page similar to the following will be displayed.

OCHESTE	Welcome!	Roge	r Roadrunner
	Every child	is a work o	of art. Creat
My Page Human Personalize <u>Conter</u>	Resources <u>Financials</u>		
Human Resource	s Menu	¢ -	Employee Leave St
Access Human on PeopleTool	n Resources Management System 9.1	Maintenance Pack 1	Leave Balances Absence Sick Vacation
Information, P	Service transactions; includes Time R ayroll and Compensation, Benefits, Sto ent, and employee Recruiting Activitie: <u>Review</u>	ck Activity, Training	Personal Human Resources 1

5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page).

PeopleSoft ePerformance – Navigation Basics



Menu	ē —
Search:	
> Self Service	
Manager Self Service	
Recruiting	
Workforce Administration	
> Benefits	
> Time and Labor	
> Workforce Development	
> Organizational Development	
> Set Up HRMS	
Enterprise Components	
Reporting Tools	
PeopleTools	
- <u>Change My Password</u>	

5.4 Click on the Manager Self Service link. A page similar to the following will appear.

ORACLE		Home Add to Favorites Sian out
Favorites Main Menu > Manager Self Service		
Manager Self Service		
🚳 Manager Self Service		
Navigate to self service information and activities for people reporting to you.		
CCD PAR Review Personnel Activity Report (PAR) Review	Review Transactions that you have submitted	Imme Management Imme Management Approve Time and Exceptions, and more. Approve Time and Exceptions Report Time View Time Manager Stech Options
Job and Personal Information Manage job and personal information for your employees. View Enclowee Personal Info Request Reporting Change Iransfer Employee Shore	Add and review information related to learning and development for employees.	Performance Management Plan, evaluate and manage performance and development for your workforce. Performance Documents

5.5 Click on the **Performance Management** link. The Performance Documents menu will appear as shown on the following page. From this menu, you will be able to Create new performance documents (Formal Observations only), complete Current Documents, view Historical and View Only Documents and perform necessary administrative tasks (such as transferring a document to another administrator) from this menu.

PeopleSoft ePerformance - Navigation Basics



ORACLE	
Favorites Main Menu > Manager Self Service	
Manager Self Service	
Performance Management	
Plan, evaluate and manage performance and development for	your workforce.
Performance Documents Create, update, and view performance documents for Image: Create Documents Image: Current Documents Image: Historical Documents Image: View-Only Documents Image: Administrative Tasks	your workforce.

5.6 To view your current performance documents, click on the **Current Documents** link. Any performance documents for your direct reports that **have not been completed** will appear in the list of *Documents you own* section as shown below.

* : *	•		ance _l vianager	nent > Performance D	ocuments > Current Docume
	formance Doc		vhich you are	the Manager. <u>C</u>	ivil Service
Documents you ov	'n			Customize Find 🗖	First 🛛 1-7 of 7 🖸 Last
Employee	Document Type	Begin Date	End Date	Job Title	Status
Fred Flintstone	RTA	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Fred Flintstone	Formal Observation	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Wilma Flintstone	RTA	10/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Wilma Flintstone	Formal Observation	10/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Tyranus Rex	Civil Service	07/01/2011	06/30/2012	Custodian Engineer	In Progress
Barney Rubble	Civil Service	09/01/2011	06/30/2012	Asst User Suppt Instructor I	In Progress
Betty Rubble	Civil Service	09/01/2011	06/30/2012	Tchr-on-Assignment	In Progress

PeopleSoft ePerformance - Navigation Basics



5.7 To view completed or prior year performance evaluations for your current direct reports, click on the **Historical Documents** link.

ORACLE						
Favorites Main Menu	> Manager	Self Service	> Performan	ce Management > Perfo	ormance_Documents >	Historical Documents
Performance Document History						
	Listed below are the completed and cancelled documents for which you are the Manager. You can access a document by selecting the "Document Type" hyperlink.					
Search for Docume	ents					
Employee First Na	Employee First Name:					
Period Between:	Period Between:					
Search Clear	Search Clear					
Performance Docu	Performance Documents Customize Find 🚰 🛗 First 🚺 1-3 of 3 🕨 Last					First 🚺 1-3 of 3 D Last
Employee	Document Type	Begin Date	End Date	Job Title	Status	Rating
Blaise Pascal	RTA	09/01/2011	06/30/2012	Tchr-Computer Science	Completed	L4-Proficient
Jane Reference	<u>RTA</u>	09/01/2011	06/30/2012	LIBRARY MEDIA SPECIALIST	Completed	L4-Proficient
Rosetta Stone	<u>RTA</u>	09/01/2011	06/30/2012	TCHR-FOREIGN LANGUAGE	Completed	L3-Meets Prof. Standards

5.8 Congratulations! You now know how to navigate to the performance documents for your direct reports. From here, you can navigate to the specific function you'd like to access by returning to the main menu or by selecting the desired function from the "bread crumbs" at the top of the PeopleSoft window, as shown below.



5.9 Navigation Pointers:

- 5.9.1 Do NOT use the Back or Forward browser buttons to navigate within PeopleSoft.
- 5.9.2 Do NOT use Multichannel Window.
- 5.9.3 Consider adding the Performance Documents to your favorites for ease of access.
- 5.9.4 Sign out of PeopleSoft, don't "X-out" of the browser window.
- 5.9.5 Remember that there is a 2 hour time-out for PeopleSoft. If you're going to be away from your desk for more than 2 hours, be sure to save your work!
- 5.9.6 Remember that the % sign is a wildcard when searching for specific values.

PeopleSoft ePerformance - Navigation Basics



ASSOCIATED DOCUMENTS

5.10 None.

6.0 RECORD RETENTION

Identification	Storage	Retention	Disposition	Protection
PeopleSoft	SharePoint	Until Superceded		N/A
ePerformance initial	ePerformance project			
implementation.	site.			

7.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/9/12	Original	Original Document
5/17/12	Civil Service	Added Civil Service to List

End of Procedure