Introduction

Shared Services implemented the Department Admin Role to assist departmental administrative staff in processing and completing various transactions and queries and reports using UTShare/PeopleSoft. In Peoplesoft terminology, campus departments are referred to as “front office” staff.

This guide demonstrates pages and reports available to campus department administrative staff responsible for personnel, position, and position funding transactions.

Departments must request access for their staff members by contacting the UTSA PeopleSoft Support and Sustainment Center.
Navigate to the Current Job Information Page

The Current Job Information page provides information such as Position number, Department ID, or Job code data.

1. Log into PeopleSoft
2. Navigation: Main Menu >> Workforce Administration >> Job Information >> Current Job

3. Search for an Employee’s Job Data record.
4. If you know the Empl ID, enter the 10 digit numeric character and click Search icon.
5. Or search by Last name
For this example, we are searching for John Smith.

6. Enter the last name Smith on the Last Name fields, then click the Search icon.

7. Select the Employee Id from the Search results
8. PeopleSoft Security will only allow you to view your department employees Job Data information.
Navigate to the Position Management Page
The Position Management Page provides information such as Position number, Job code, and Mail drop id data.

- Navigation: Main Menu >> Organizational Development >> Position Management >> Maintain Positions/Budgets >> Add/Update Position

- Search for a position by entering search criteria.
- The next page is shown below. Using the tabs you will be able to find position information.
Navigate to the Job Summary Page

The Job Summary Page provides information such as Job Data Action History, Employee Job Data, Work Location, Salary and Compensation, Distribution, and Contract Information.

- Navigation: Main Menu >> UTZ Customizations >> Human Resources >> Job Summary
• Search for an employee by entering search criteria.

**Job Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

- **Empl ID:**
  - begins with
  - =

- **Empl Record:**
  - begins with

- **Name:**
  - begins with

- **Last Name:**
  - begins with

- **Second Last Name:**
  - begins with

- **Alternate Character Name:**
  - begins with

- **Middle Name:**
  - begins with

- **Organizational Relationship:**
  - begins with
  - =

- **Case Sensitive**

[Search] [Clear] [Basic Search] [Save Search Criteria]
- The next page is shown below. Using the tabs you will be able to find job summary.

**Job Summary**

Sally Smith

<table>
<thead>
<tr>
<th>Org Relation</th>
<th>Empl Record</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Action</th>
<th>Go To Job</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>0</td>
<td>04/13/2015</td>
<td>0</td>
<td>Posn Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>04/13/2015</td>
<td>0</td>
<td>Posn Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>10/06/2014</td>
<td>0</td>
<td>Posn Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>10/05/2014</td>
<td>0</td>
<td>Posn Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>10/01/2014</td>
<td>0</td>
<td>Posn Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>10/01/2014</td>
<td>0</td>
<td>Posn Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>05/01/2014</td>
<td>0</td>
<td>Data Chg</td>
<td>[Job Data]</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>12/01/2010</td>
<td>0</td>
<td>Hire</td>
<td>[Job Data]</td>
</tr>
</tbody>
</table>

[Return to Search] [Notify]
Available Queries
Queries are customized reports built by UTShare/UTSA. Below is a list of available queries. Be aware that the results from the queries will display information for the departments you have been granted access.

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
<th>When to run this query</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee and Position Queries</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UTS_FO_ACTIVE_EES</td>
<td>Active EEs Prompt by Dept ID</td>
<td>Provides a list of all active employees and their current job information</td>
</tr>
<tr>
<td>UTS_FO_EE_ADDRESS</td>
<td>EE Address Info</td>
<td>Provides a list of all active employees and their current address information</td>
</tr>
<tr>
<td>UTS_FO_EE_CONTACT_INFO</td>
<td>EE Contact Info</td>
<td>Provides a list of all active employees and their current contact information</td>
</tr>
<tr>
<td><strong>Budget Queries</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UTS_CA_FUNDED_BY_OTHER DEPT</td>
<td>Pos Funded by other dept</td>
<td>Provides list of positions funded by another department; important since departments need to coordinate funding changes with those departments funding the position</td>
</tr>
<tr>
<td>UTS_CA_MULTIPLE_POS_FUNDING</td>
<td>EE with multiple positions</td>
<td>Provides list of employees with multiple positions; important to ensure 1) FTE, 2) Distribution for each position</td>
</tr>
<tr>
<td>UTS_CA_POSITIONS_FUNDED_DBT</td>
<td>Positions Funded including vacant positions</td>
<td>Provides list of positions funded including vacant; departments must ensure all positions have continuous funding</td>
</tr>
<tr>
<td>UTS_CA_POSITIONS_FUNDED_FILLED</td>
<td>Positions Funded incl. vacant</td>
<td>Provides list of positions filled and funded with employee names; does not include vacant positions; departments will use to validate filled positions to dept. employees</td>
</tr>
<tr>
<td>UTS_CA_POS_FUNDING_END_DATE</td>
<td>Positions with funding end dates</td>
<td>Provides list of position that have a funding end date; departments are accountable for ensuring positions with expiring funds have a new DBT effective immediately following the funding end date</td>
</tr>
<tr>
<td>UTS_CA_POS_FUNDING_HISTORY</td>
<td>History of position's funding</td>
<td>Provides funding history for departments to track and update funding</td>
</tr>
<tr>
<td>UTS_CA_UNFUNDED_POSITIONS</td>
<td>Positions Not Funded</td>
<td>Provides list of unfunded positions; important for departments to monitor and fund unfunded positions</td>
</tr>
<tr>
<td><strong>Human Resource Related Queries</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UTS_HW_RET_FAC_STAFF_PM5069A</td>
<td>Retired Faculty and Staff</td>
<td>Provides a list of retired faculty and staff</td>
</tr>
<tr>
<td>UTS_HW_ACT_FAC_STAFF_PM5069B</td>
<td>Active Faculty and Staff</td>
<td>Provides a list of active faculty and staff</td>
</tr>
<tr>
<td>UTS_HW_ACTIVE_EMP_VISA_PM5064</td>
<td>UTSA Active Emp with any Visa</td>
<td>Provides a list of active employees with any type of VISA employment</td>
</tr>
</tbody>
</table>
Run and Find a Specific Query in PeopleSoft Query Viewer

Use the PeopleSoft Query Viewer to view and download personnel, position, and funding related data. (Refer Queries listed on page 11)

1. Navigate to www.myUTSA.edu
2. Select the myUTSA drop-down menu to open the selections
3. Select UTShare/PeopleSoft
Navigation to the **Query Viewer**

1. Select to **Main Menu**
2. Select **HCM Reporting Tools**
3. Select **Query**
4. Select **Query Viewer**

5. Select “**Query Name**” in the **Search By** drop down

6. Type in the name of the query, for this example we are going search for the report name “**UTS_CA_POSITION_LIST**”

7. Select the **Search** button

**NOTE:** If you see a message about a Pop-up blocker, be sure to click “**Always accept from this site.**”
Selecting a format to view the query

8. Once you have completed the steps above, the query will appear on a list. You will have options on the left requesting you to select the format to view the query (HTML, Excel or XML). Select the format and new window will appear.

Note: If you use a query often you may want to save as a Favorite.

9. Click the Favorite link.
Note: If you choose not to save your query as a Favorite. Click the “minus” sign to remove it.
## Available Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Report Description</th>
<th>Menu Navigation</th>
</tr>
</thead>
</table>
| PER015 Personnel Actions History | Provides a list of Personnel Action History  
This report includes: Action Reason, Effective Date, Employee Name, Employee ID, Hire Date, Years of Service, Employee Type, Regular or Temporary, Job Code, Job Title, Salary Grade, Compensation Rate, Supervisor. | Main Menu>>  
Workforce Administration>>  
Job Information>>  
Reports>>  
Personnel Actions History |
| PER002 Employees Birthdays   | Provides a list of the birthdays for employees in the department(s) you have been granted access | Main Menu>>  
Workforce Administration>>  
Personal Information>>  
Biographical>>  
Birthday’s Report |
| PER004 Emergency Contacts    | Provides a list of the emergency contacts for employees in the department(s) you have been granted access | Main Menu>>  
Workforce Administration >>  
Personal Information >> Personal Relationships>>  
Emergency Contacts Report |
| UTZHC506 Payroll Liquidation | Provides details of Encumbrance HR Accounting lines that are being sent to GL tied to individual employee and paycheck. This report should detail the encumbrance liquidation amounts | Main Menu >>  
UTZ Customizations >>  
Commitment Accounting >>  
Reports >>  
Payroll Liquidation |
| UTZHC507 Encumbrance Dtls by EmplID/Sal | Provides actual expense and encumbered amounts by employee & position | Main Menu >>  
UTZ Customizations >>  
Commitment Accounting >>  
Reports >>  
Encumbrance Dtls by EmplID/Sal |
| UTZHC508 Bdgt Actls to Encumbrance Dtl | Provides actual expense and encumbered amounts for entire business unit | Main Menu >>  
UTZ Customizations >>  
Commitment Accounting >>  
Reports >>  
Bdgt Actls to Encumbrance Dtl |
| UTZHC502 Salary by Project ID | Provides Payroll assignments grouped by Project ID | Main Menu >>  
UTZ Customizations >>  
Commitment Accounting >>  
Reports >>  
Salary by Project ID |
| UTZHC509 Salary by Cost Center | Provides Payroll assignments grouped by Cost Center | Main Menu >>  
UTZ Customizations >>  
Commitment Accounting >>  
Reports >>  
Salary by Cost Center |
How to Run a Report
A report is used to provide particular information at a glance. Below are the instructions how to run the Personnel Actions History report; use these instructions to run other reports. (Refer Reports listed on page 16)

1. Enter Run Control ID name (In this example enter your first and last name initials)
2. Click Search icon

If the search results display “No matching values were found” (indicated with the arrow below), either the report name is incorrect or the report doesn’t exist.

3. Select the Add a New Value Tab
4. Click **Add** icon

5. Select **From Date** (i.e. 5/1/2014)
6. Select **Thru Date** (i.e. 5/17/2014)
7. Select the **Action** code from the drop down options
8. Select “Plus” sign if you want to include more than one Action code
9. Select the **Run** button
The next page you will see is the Process Scheduler Request

10. Verify the Personnel Actions History is selected or checked.
11. Click OK icon

12. Take note of the Process Instance Number
13. Click the **Process Monitor** link to view the status of the report

Note: The Process Instance number i.e. 36546 is an unique idenifer for each report.
14. Continue to click the **Refresh** button until the Run Status displays the following:
   - **Success**, and
   - Distribution Status is **Posted**

15. Click the **Go back to Personnel Actions History** link to view posted data or report results.

16. Click the **Report Manager** Link
A link to view the data results will display in two places (1) the List Tab (2) the Administration Tab.

17. Click the **Administration Tab**

18. There are two ways to see the results of your report. (1) Click **Personnel Actions History** link to view PDF or (2) click **Details** to view PDF link of data results.
19. Click the PDF link to view data results

Below is the result of the PDF file. This completes the process to run reports.
Excerpts from the Guide to Transition to PeopleSoft

The following are reminders of changes that affect Department Administrative and Clerical staff. The full document is located at http://www.utsa.edu/utshare/Change/TransitionGuidePeoplesoft.pdf.

Employee and Position Related Changes

1. Administrative staffs in the front offices (campus departments) will have view only access to position and employee information during the interim approval workflow processing period (May 2014 through spring 2015).

2. All personnel transactions (formerly HRMS assignments) for both benefit eligible and non-benefit eligible employees will be entered into UTShare/PeopleSoft by Human Resources staff using UTSA’s SharePoint Interim Workflow Solution, Departmental HR forms until full UTShare/PeopleSoft functionality is deployed:
   a. Interim approval workflow procedures are explained in each UTShare/PeopleSoft training class.
   b. Position requests, position change requests, and salary requests will be submitted to the HR-Compensation department outside of UTShare/PeopleSoft.
   c. Personnel actions (hires, rehires, and terminations) will be submitted to HR-Day ONE outside of UTShare/PeopleSoft.
   d. During the interim processes period, all appropriate approvals must be obtained before submitting requests to Human Resources. Documentation of approvals must be included with each request.
   e. All employees, including student employees, must be assigned to a unique position so the correct “reports to” supervisor is identified for time approval purposes. Pooled positions will not be allowed under UTShare/PeopleSoft.
   f. The FTE (full time equivalent) value must match on both the position and the job (assignment).
   g. Every faculty member who works during the summer will need a separate position for their summer job assignment. A significant one-time effort will be required to create these positions in May 2014 as part of go-live. These positions can be re-used in subsequent years.
   h. Reminder: Benefits eligible staff are individuals who work 20 hours or more a week, for a period of 4.5 months (135 days) or longer.

3. Position funding will be maintained in UTShare/PeopleSoft by Department Administrative and Clerical staff:
   a. Funding of positions is now separate from the creation or modification of a position in UTShare/PeopleSoft and is not viewable on either the position or job (assignment) pages.
   b. Combination codes are used to fund positions and must correspond to either a Cost Center (non-grant) or Project ID (grant).
   c. Every paid position must be funded in the Department Budget Table (DBT) in UTShare/PeopleSoft with a valid combination code to ensure actuals distribution of expenses to the general ledger.
Quick Guide for Department Administrative Staff

d. Departments must fund all paid positions with valid funding sources in the Department Budget Table (DBT) through the end of the fiscal year or through the end of the job assignment (if ending prior to August 31).

e. Default account combination codes cannot be utilized in UTShare/PeopleSoft since these accounts do not have budgetary funding.

f. Departments have the option to use funding end dates in the DBT as a last resort if sufficient funding is not available. However, departments will be held responsible for acquiring/updating funding sources in a timely manner.

g. Persons of Interest (POI – employees without salary) positions will not be funded in the Department Budget Table.

4. Funding changes must be approved by the Department Manager (Unit Administrator) outside of UTShare/PeopleSoft during the interim processes period, using UTSA’s SharePoint Interim Workflow Solution, Departmental HR forms and before data entry into UTShare/PeopleSoft:

a. Department administrative and clerical staff who maintain position funding must coordinate closely with Department Managers/Administrators to ensure that positions are funded with the correct fund sources.

b. UTShare/PeopleSoft does NOT flag insufficient funding at the time combination codes are entered in the Department Budget Table (DBT).

c. It will be critical for departments to verify available funds prior to initiating funding source updates for positions. This will include using the Budget Overview page in UTShare/PeopleSoft and reconciliation reports to ensure sufficient funds are available to cover labor expenses.

d. Funding source changes initiated by Departmental Administrative and Clerical staff will need to be manually approved by your Department Manager prior to electronically routing to the Budget Office during the interim processes period.

e. Funding source changes on grant funds will be routed by the Budget Office to the respective Research Service Center for their approval.

f. Department Administrative and Clerical staff must provide reports on positions and funding to their Department Manager for verification and review.

5. The work study funding process has changed:

a. Position attributes are provided by the department; positions are created by HR-Compensation, and upon approval, are funded by the department in the DBT.

b. The Financial Aid Office will enter the awarded amount after the student is assigned an employee ID and has been added to the system with the employee class of "work study" by Human Resources.

c. The Payroll re-distribution process will reallocate the funding of paid salaries to the work-study funding source.

6. All employees (including those currently referred to as occasional workers) must have a position and job (assignment) record in UTShare/PeopleSoft. For today’s occasional workers, a high volume of transactions are expected as these employees must be routinely terminated and re-hired to avoid the inappropriate accrual of state service time.

7. The concepts of effective dates and effective statuses are used to track position and job record changes, including the end of employment.
a. UTShare/PeopleSoft does not use the concept of “end dates”, which will significantly impact the way data is entered into the system and reports are interpreted.

b. An “effective date” is the date upon which an HR transaction is considered to take effect. Examples:
   i. An employees’ first date of employment is 4/1/14 so this same date would be used as their effective ‘start’ date.
   ii. An employees’ last date of work is 4/30/14 so their effective ‘end/termination/retirement’ date would be 5/1/14, the first date of their new status.

c. In DEFINE/HRMS one can enter an assignment end date on the same document that is used to create the assignment.
   i. This will not be the practice in PeopleSoft; however, we do have a field to enter an “Expected End Date”. Reports will be run off the “Expected End Date” and once this date approaches and is verified an actual end date will be entered.
   ii. Example- An employee has been hired on 4/1/14 for less than 4.5 months. Day ONE will enter an Expected End Date on the employee’s job record for 7/15/14 in order to manage end dates.

**Tips and Reminders for Department Administrators**

1. Terminations are handled differently in PeopleSoft than in DEFINE. Please note the following:

   a. There are no end dates in PeopleSoft; therefore a termination form must be submitted to end the job. If a termination form is not submitted to end the job, employees who are paid monthly will get overpaid.

   b. Departments must not to terminate an employee until they have completed working. If time is worked after a termination date, the employee will NOT get paid until the next regular pay date.

   c. All employees paid monthly are paid their full salary unless a termination is submitted to Human Resources to end their job/assignment by mid-month:
      i. Timekeepers must enter the terminating employee’s time and absences into PeopleSoft.
      ii. Then the Department Administrator must submit a “Review/Request Job Record Change for Employee” form to terminate the employee.
      iii. If an employee works past their termination date, this time cannot be paid until the termination date is changed. This creates significant work to correct and may delay the employee’s paycheck.

   d. Departments must request a termination for monthly GRA’s/TA’s, etc. – HR will not enter terminations automatically.
      i. These positions are salaried and will get paid up to the termination date whether or not hours are submitted.
      ii. The Department Administrator must submit a “Review/Request Job Record Change for Employee” form to terminate the employee and ensure that the employee will no longer be working.

   b. Departments must verify with their timekeeper that all timesheets have been submitted for an employee before submitting a termination request. Timesheets cannot be submitted after an employee’s termination date.
2. HR can no longer process retroactive hires. Departments must submit hire requests in advance of the hire date according to the processing calendar on the HR website. Be sure to attach all required paperwork to the hire request.

3. Positions must match the number of hours that the employee is assigned.

4. Newly hired non-benefit eligible employees and newly hired students must complete the online I-9, W-4, and Biographical information in PeopleSoft. Departments are asked to verify that hired/rehired employees complete this information in Employee Self Service (ESS).

5. CBC, STARS, and benefits eligible processing has not changed due to PeopleSoft. Please continue to use these processes and adhere to their deadlines.