Table of Contents

Click on any topic below to go directly to that page.

Introduction

This document is for anyone who has been given an OR_ or RA_ login into PeopleSoft. This is a user ID that begins with the characters “OR_” or “RA_”. When you log into PeopleSoft with this alternate ID, you will have access to information that you would not normally have access to if you logged in with your ASURITE ID and password.

What you will learn from this document

In this document you will learn about:

- The roles covered by this document
- How to login and navigate in PeopleSoft
- What information is available on different pages
- How to do different procedures using your login.

Description of the new Log-ins

There are different logins; one set has an “OR_ appended to the front of a users ASUrite ID, the other set has “RA_” appended to the front of the ASURITE ID. A person will have either an OR_ login on RA_ login. If your ASUrite ID was JSMITH, your login would either be OR_JSMITH or RA_JSMITH.

Both logins have these two roles, which allow you to see certain pages of information in Peoplesoft.

- HCM ORPSA View 1
- View Only access to all ER Pages
- Pwd Change for Internal Users

These roles are only to be use with OR_ and RA_ logins, never attached to a person’s regular login (their ASURITE ID). The OR_ and RA_ logins are identical. There are two different logins so that the different groups of people can be managed separately.

How to Gain Access to the system.

The creation of the OR_ and RA_ logins is a managed process, meaning that departments are identifying employees to have this extra login and are requesting it for them. You may get an email from the PeopleSoft system requesting that you acknowledge a role that has been requested for you. If you do, special instructions will be included in the message for you to follow.

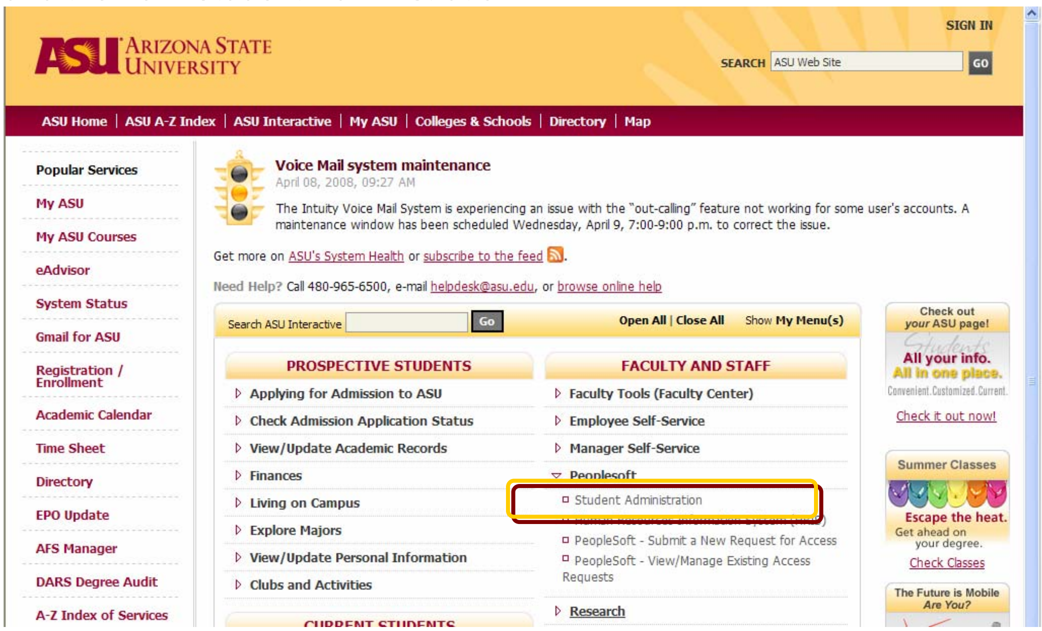
Getting Started

This section will show you how to get to Peoplesoft, how to login and how to change your password (optional).

How to get to PeopleSoft

PeopleSoft is access through a web browser (Internet explorer and Mozilla Fire fox are the most popular). Open your web browser and go to https://hrsa.oasis.asu.edu

An easy way to get there is to go to ASU interactive, click on the Peoplesoft category and then on "Student Administration"



Logging In

Next, login with your OR_ or RA_ user ID and password. Your user Id is most likely to be your ASURITE ID with either "OR_" or "RA_" in front of it. (Ex. JSMITH would be OR_JSMITH). Etc. Your password was sent to you in an email. Note that the user ID is uppercase. The password is case sensitive.

Changing Password

Once you have logged in, many people want to change the password on their OR_ or RA_login to match their ASURITE Password. You are welcome to do that. Here's how.

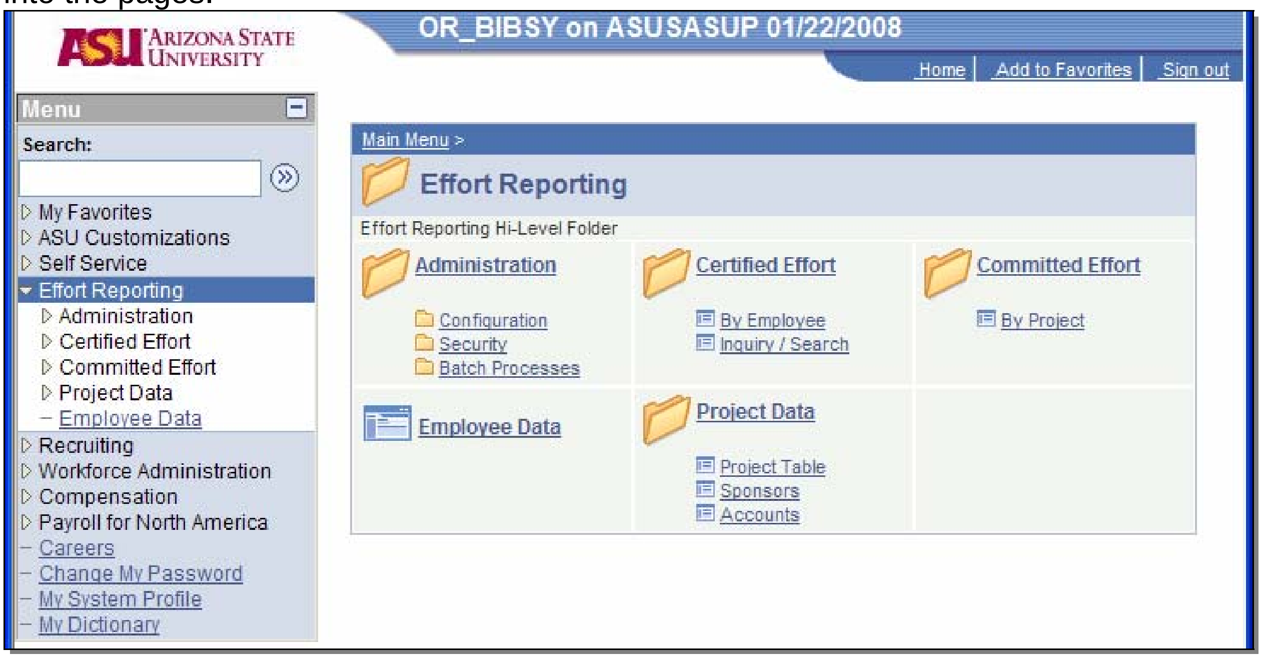
1. Click on "Change My Password"
2. Type in your current password
3. Type in your new password
4. Type in your new password again in the "Confirm Password" field.
5. Click on "Change Password"

Basic Navigation

This section is a quick overview for those that have never ventured into PeopleSoft before. If you are an experienced PeopleSoft user, you can skip this section.

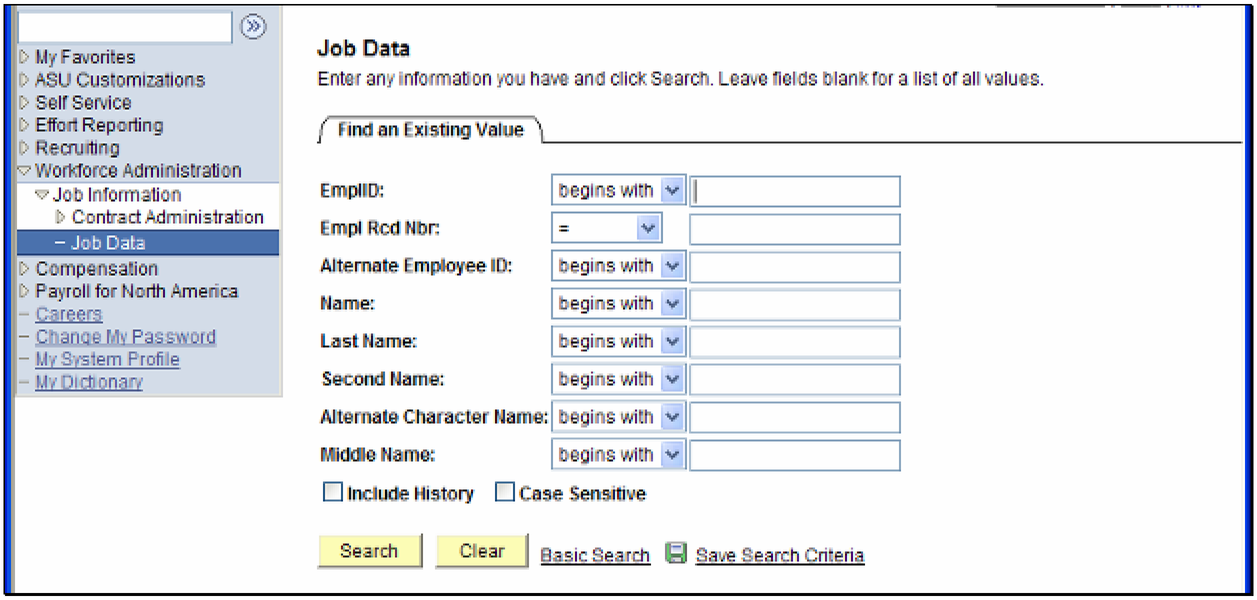
Using Menus

This is called your home page. It will appear each time you login. The pages you want to access are under the “Effort Reporting”, “Workforce Administration” and “ASU Customizations” menu items.
When you click on a menu item, the menu on the left expands and the links also appear on the right in what’s called a “fan page”. You can use either side to navigate further into the pages.



Using Search Screens

Most pages in PeopleSoft are preceded by a search page, where you enter data on what you want to see on the information page. These search pages work in a similar manner.



Notes:

- *EmplID* is the Affiliate ID (1000…)
- *Empl Rcd Nbr* is the Employee Record Number – a 0, 1, 2 or 3 depending on the number of changes to an employee's record in a single day. Usually left blank during searches.
- *Alternate Employee ID* is the Campus ID (993...)
- *Name* is first name
- *Last Name* is last name

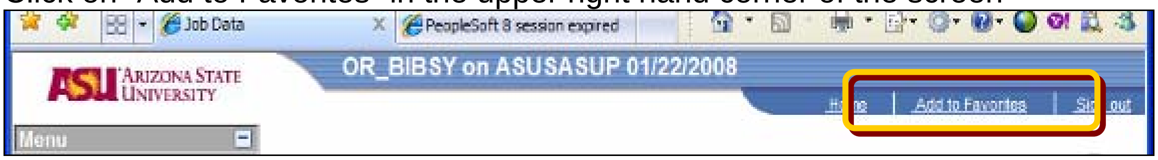
- Be sure to click on *Include History* to get all of the data.
- Click on the *Clear* button to clear data in the fields from previous searches.
- Click on the *Search* button to start the search.

Saving to Favorites

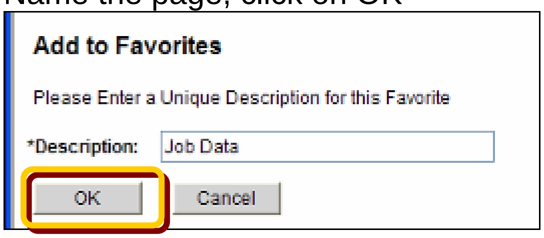
Once you have navigated to a page you will use often, you can save it to your favorites. This will make the page appear under the “My Favorites” menu. The nice thing about this feature is that it will follow your login. If you set your favorites at work and then login at home on a different computer, the favorites will still be there.
To set your favorites do this:

1. Navigate to the page you want to save

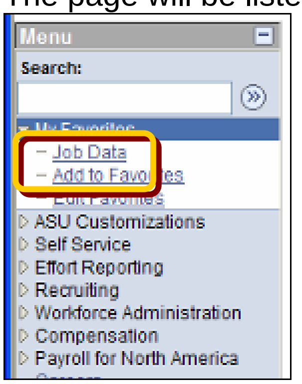
2. Click on “Add to Favorites” in the upper right hand corner of the screen



3. Name the page, click on OK



4. The page will be listed under My Favorites.



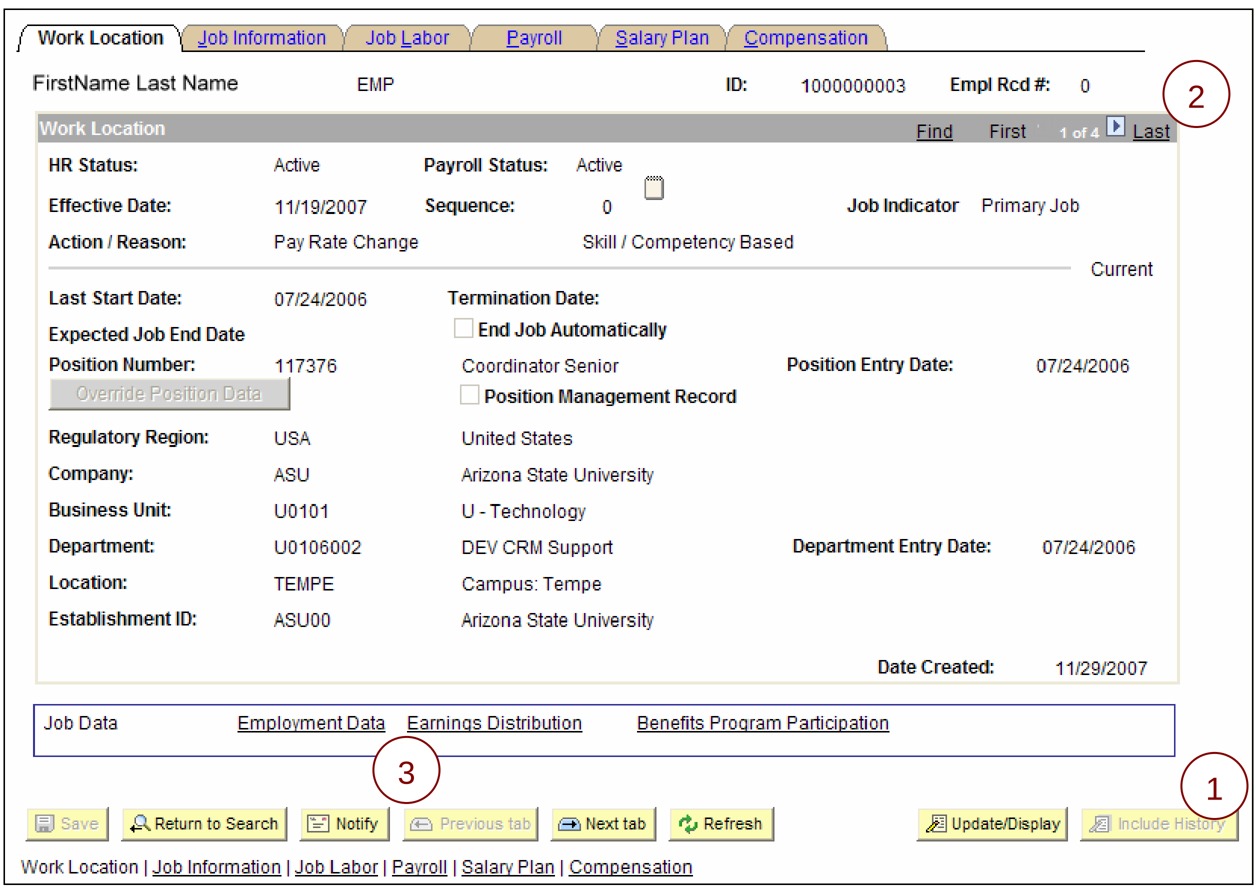
Checking Current Roles

If you want to check what roles are active for your login, follow these links:
ASU Customizations -> ASU Security-> My Security Access Roles.
You will see a printout of the current roles that your login is using. If you don’t see the roles listed earlier in this document, contact your supervisor.

Navigating on Information Pages

There are several common navigation hints that will help you in using Peoplesoft.

1. **Include history**
   If there is a checkbox or button available to you that says "include history", ALWAYS check or click it. This will show you all previous history for the person that you are searching for. On some screens, PeopleSoft will only show you the latest information. Click on *Include History* will give you a more complete picture.
2. **Watch the Upper Right Corner!**
   Often PeopleSoft will only display a few rows of information. To see all of the data in a table, you must keep an eye on the upper corner of the row. If it says something like "1-7 of 23" then you are not seeing rows 8-23. You can either click *View All* and scroll through the rows or click the right arrow button to go through the rows a few at a time.
3. **Return to search, Previous and Next in list**
   Look for buttons at the bottom of the screen that will let you step through the items that you searched for, or to return to search once you are done.


Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

FirstName Last Name EMP ID: 1000000003 Empl Rcd #: 0

2

Work Location Find First 1 of 4 Last

HR Status:	Active	Payroll Status:	Active		
Effective Date:	11/19/2007	Sequence:	0	Job Indicator	Primary Job
Action / Reason:	Pay Rate Change		Skill / Competency Based		

Current

Last Start Date:	07/24/2006	Termination Date:			
Expected Job End Date		End Job Automatically			
Position Number:	117376	Coordinator Senior		Position Entry Date:	07/24/2006
Override Position Data		Position Management Record			
Regulatory Region:	USA	United States			
Company:	ASU	Arizona State University			
Business Unit:	U0101	U - Technology			
Department:	U0106002	DEV CRM Support		Department Entry Date:	07/24/2006
Location:	TEMPE	Campus: Tempe			
Establishment ID:	ASU00	Arizona State University			
				Date Created:	11/29/2007

Job Data Employment Data Earnings Distribution Benefits Program Participation

3 1

Save | Return to Search | Notify | Previous tab | Next tab | Refresh | Update/Display | Include History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Basic Procedures

Prepare a Budget for Proposal

When you are preparing a budget for proposal, there are several pieces of data that you need:

- The faculty member's actual salary
- The different jobs the faculty member has
- The type of contract that the faculty member has, (if any)
- The amount of time that the faculty works per year (12 month, 9 month or other)
- The Faculty member's work location

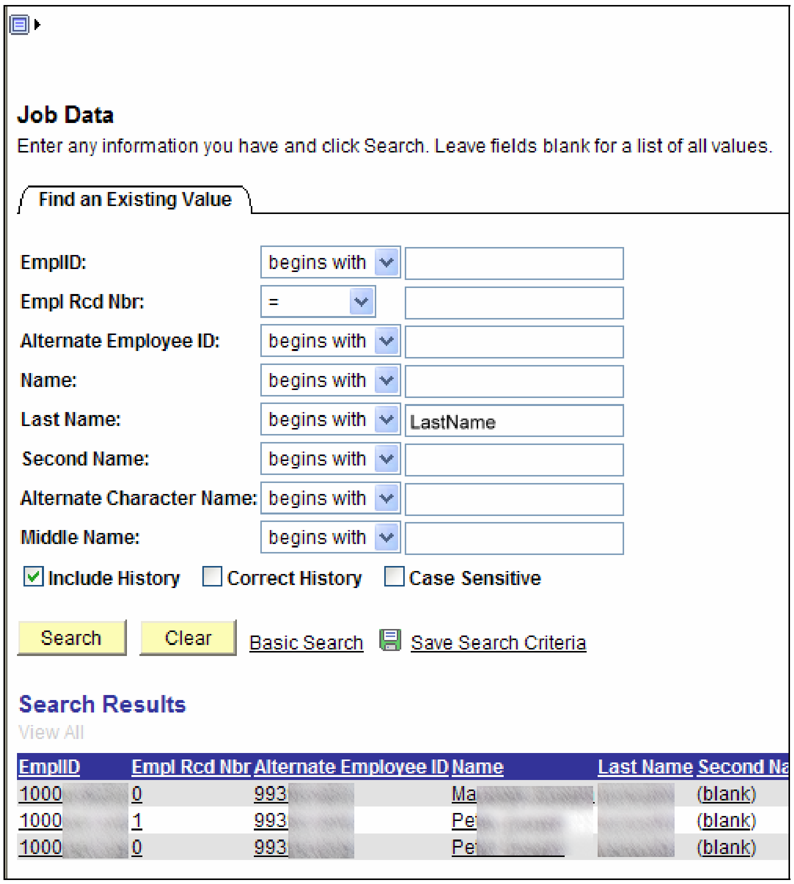
This section will show you how to find all of these items in PeopleSoft. You can find them in any order.

Faculty Member Salary

Login to Peoplesoft (https://hrsa.oasis.asu.edu) with your ID that begins with either OR_ or RA_.

You will find the faculty member's salary in the Workforce Administration area.

Navigation: Workforce administration -> Job Information -> Job Data



Job Data

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

Find an Existing Value

EmplID:	begins with	
Empl Rcd Nbr:	=	
Alternate Employee ID:	begins with	
Name:	begins with	
Last Name:	begins with	LastName
Second Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☑ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All

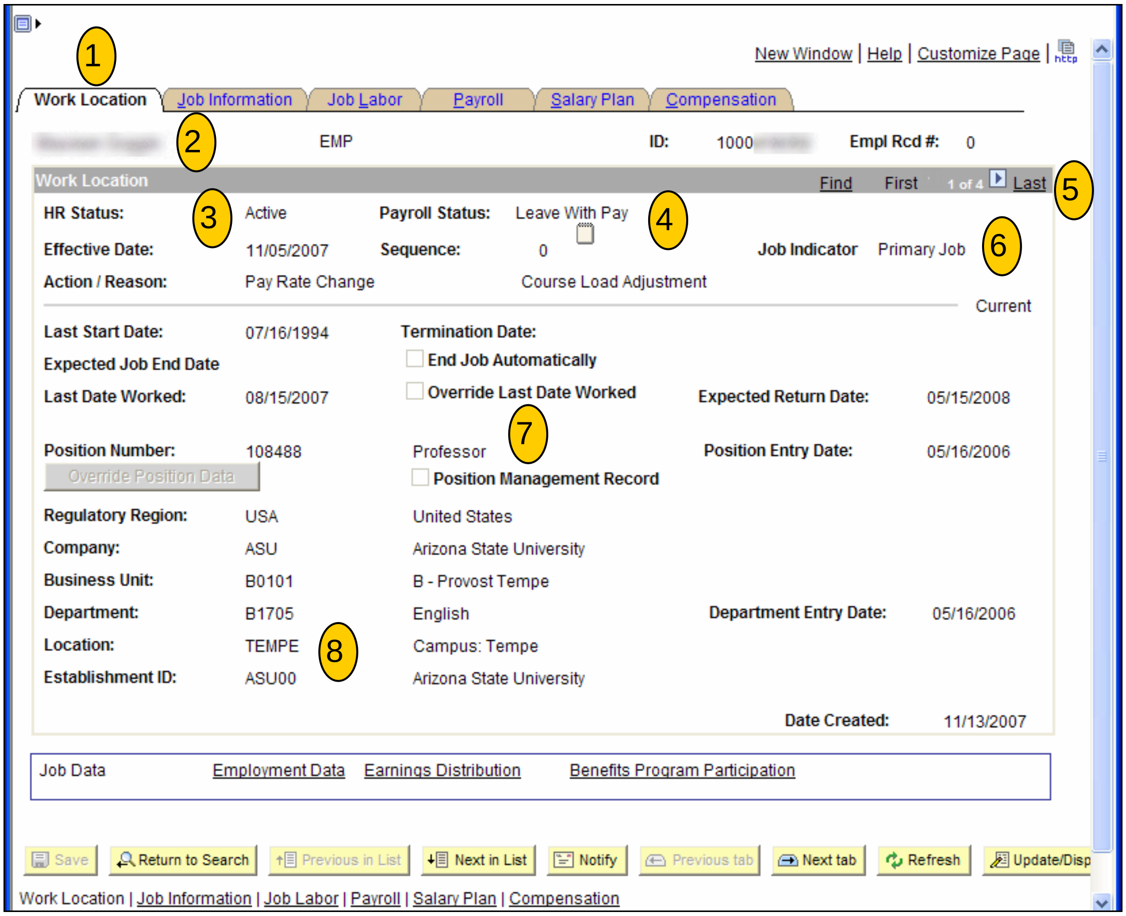
EmplID	Empl Rcd Nbr	Alternate Employee ID	Name	Last Name	Second Na
1000	0	993	Ma		(blank)
1000	1	993	Pe		(blank)
1000	0	993	Pe		(blank)

- Enter search info about the faculty member.
  - The EmplID is the faculty member's affiliate ID (1000…)
  - The Alternative ID is the ASU ID (993…)
- Click on "Include History"
- Click on "Search"
- Click on any link in the row for the person that you want to view.

Note:

Notice the "Empl Rcd Nbr" – if you see two lines with the same person and two employee Record Numbers (typically 0 and 1) – that means that the person has two (or more) jobs. The person's primary job will have an employee record number of 0.

This is the job data tab. It has a wealth of information about the person's job data. On the first tab, (work location) check these items:

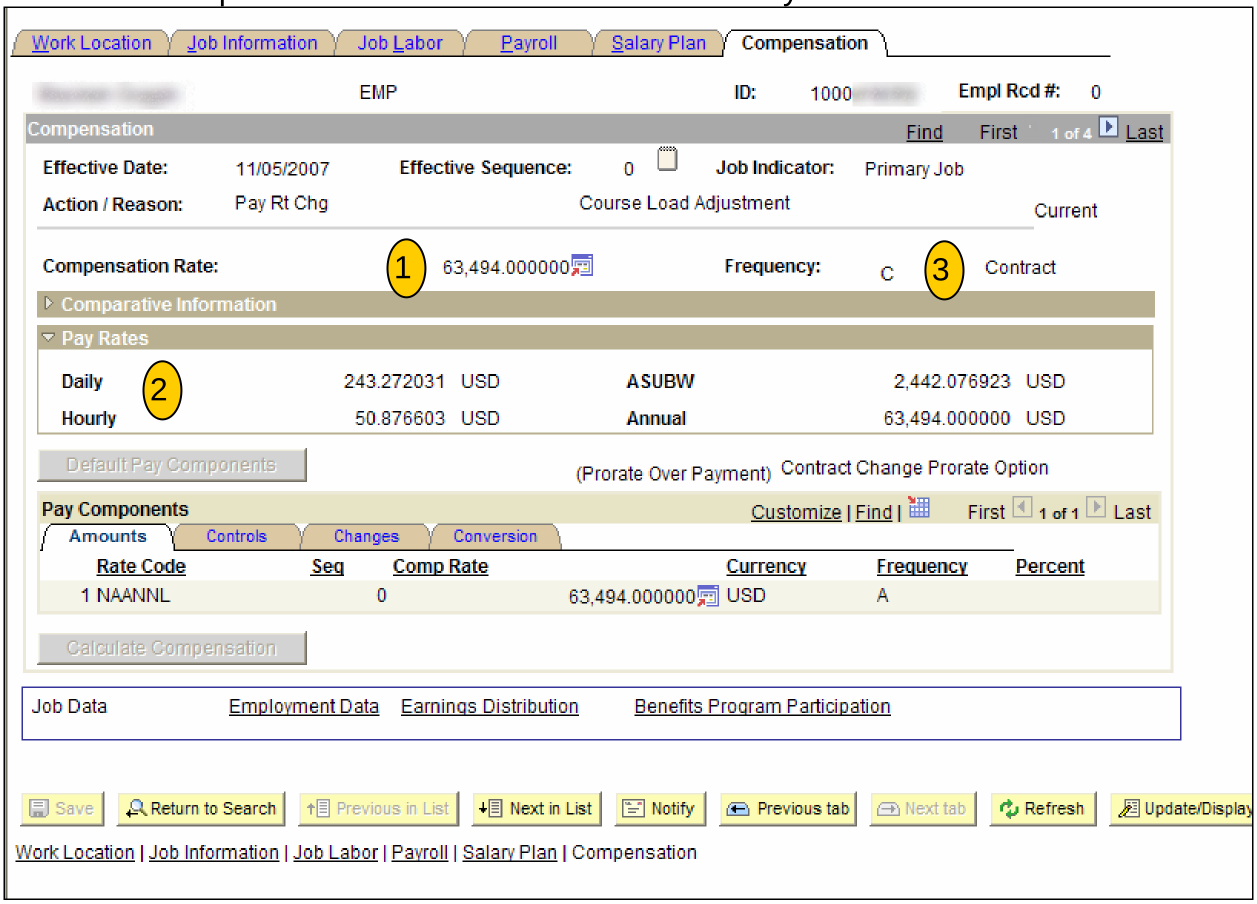


1. Start on the *Work Location* tab
2. Check the employee's name to make sure that you are looking at the right information.
3. Ensure that the employee's HR Status is active.
4. Ensure that the employee's Payroll Status is active. In this example, the person is on leave with pay. This would normally require more investigation.
5. Every time an employee's pay situation changes, a new row is added. This employee has 4 rows of history to look at.
6. Ensure that you know whether you are looking at the person's primary job.
7. The position is listed in the middle of the screen. This is a good double check that you have the correct person.
8. Location. These fields will tell you what campus, department and location of the employee.

Once you have confirmed that you are looking at the primary job for the right person, click on the *Compensation* tab.

Salary

This is the compensation tab. It shows the annual salary.



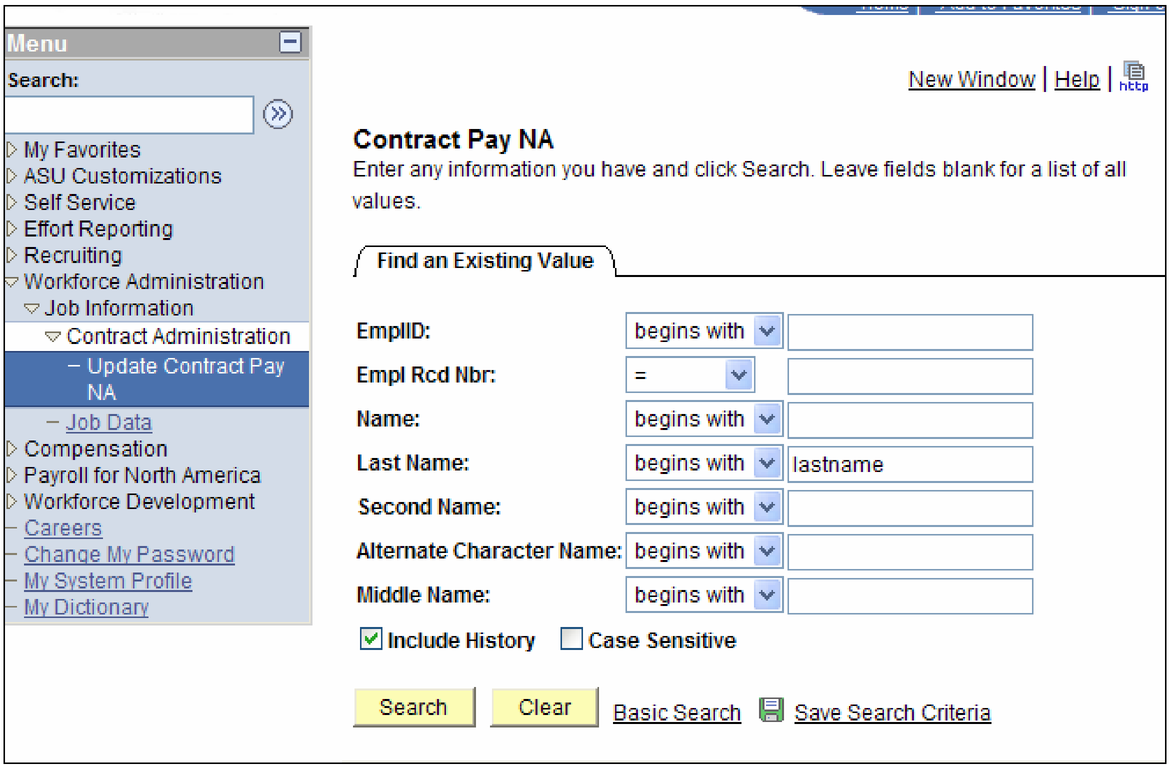
1. The base salary is shown here.
2. You can see the breakdown of daily, hourly, by weekly and annual in the Pay Rates section.
3. The frequency shows that this person is on contract. Next you need to find out if the person is on a 9, 12 or other contract amount.

You can verify the person's number of hours per week, percent FTE and employee class on the Job Information tab.

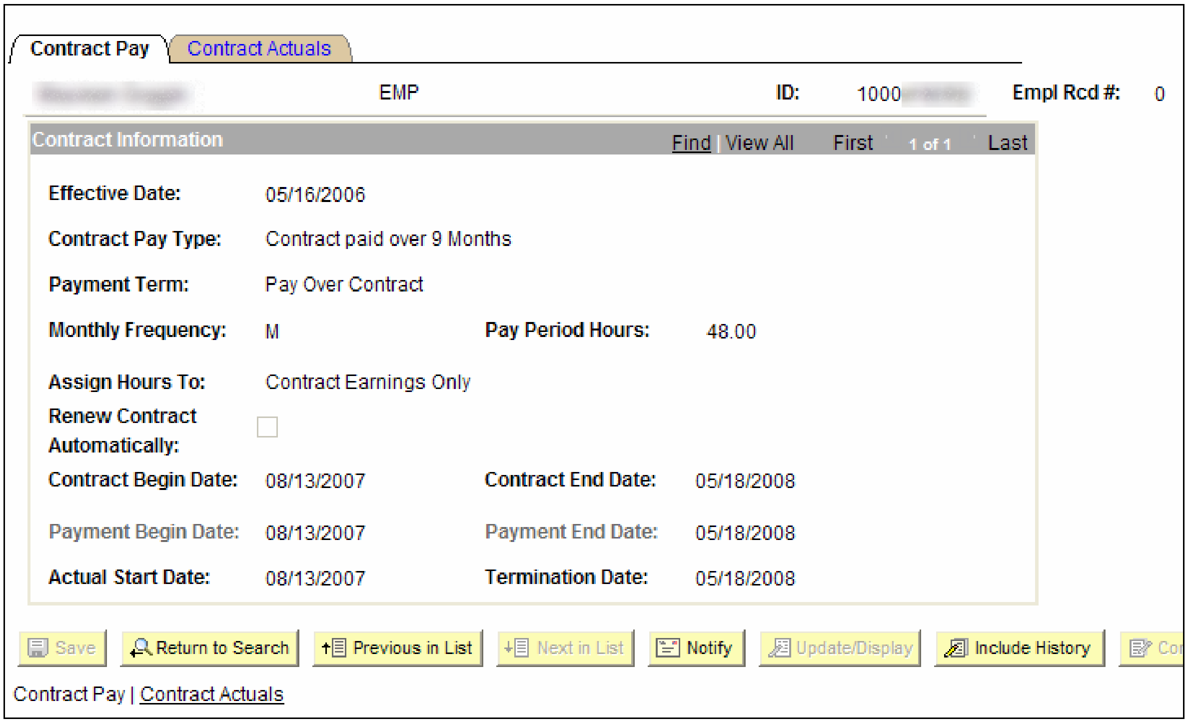
Notice that even though this employee has a contract, that information is blank on this screen. You cannot use this screen to look up contract information.

Contract Information

Navigation: Workforce Administration -> Contract Administration -> Update Contract Pay NA

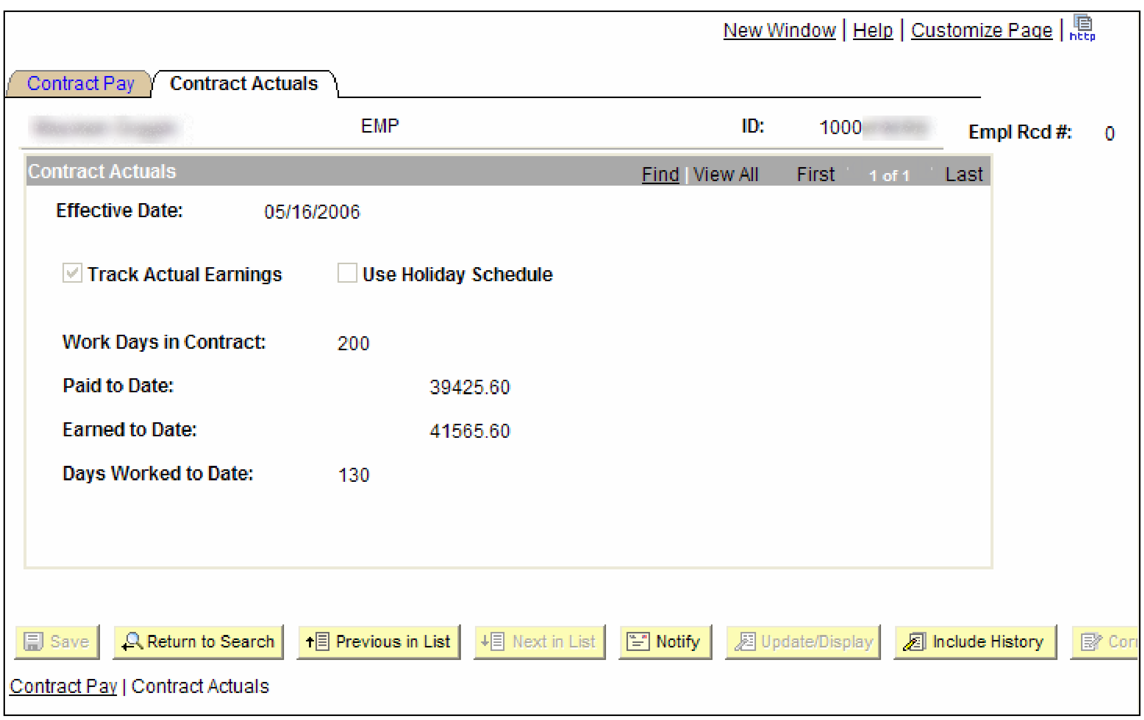


Search for your faculty member.
Click on Include History
Click on Search



This screen shows that this faculty member has a 9 month contract which started in August and will end in may.

The Actuals tab will show you how much has been paid on the contract to date.

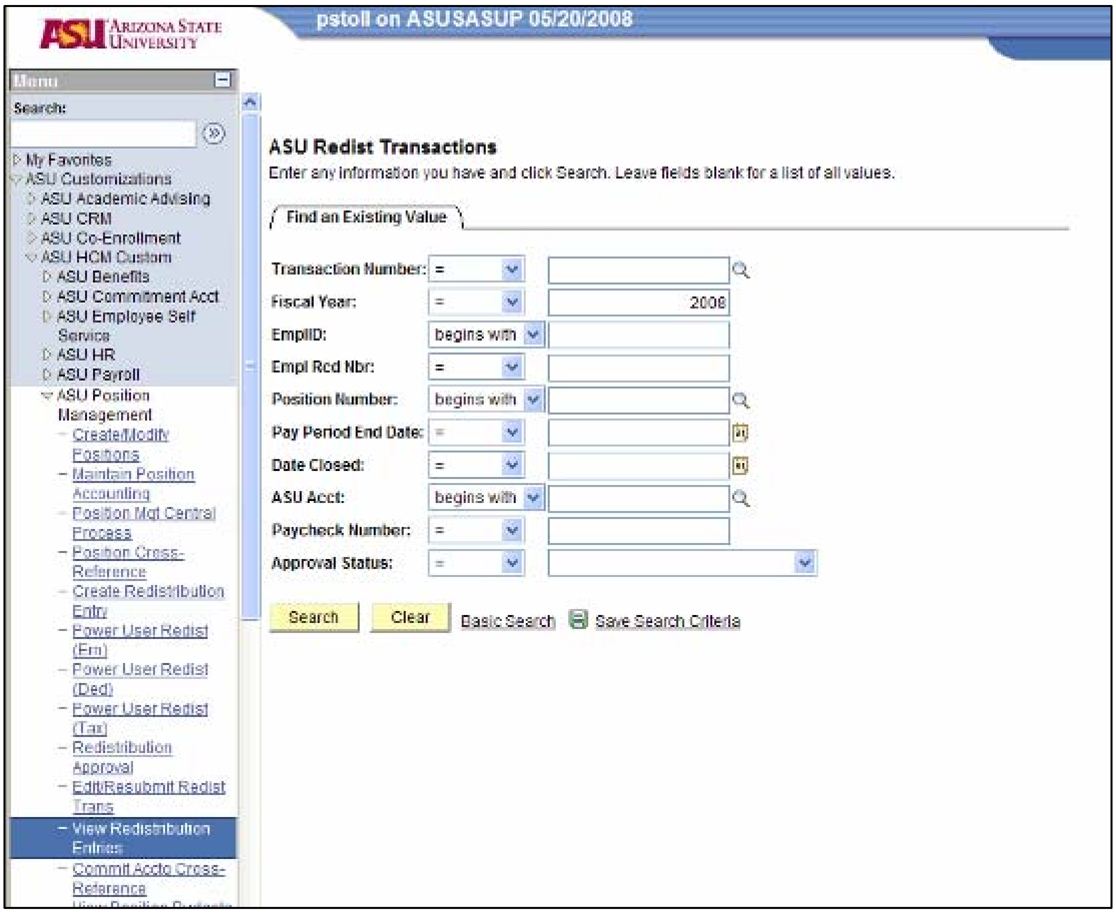


View Redistribution Entries

You can view the details about any redistribution transactions.

The navigation path is:
ASU Customization -> ASU HCM Custom -> ASU Position Management -> View Redistribution Entries.

You will come to a search screen. Enter any search criteria you have.



Once you enter your search criteria, you can save your search criteria by clicking on the "Save Search Criteria" link. You will be asked to name the search criteria. Peoplesoft will then remember it for you for next time.

Click "Search" to search the database for your data.

View Redistribution Transaction

pstoll

Search Results

Transaction Nbr: **141548** Approval Status: All Approved

Fiscal Year: 2008 Pay End Date: 12/02/2007

EmplID / Rcd: 1000000000 / 2 GL Post Date: 05/13/2008

Submitted by: OR_BFINLEY Jensen,Babette Finley Submitted Date: 05/11/2008

Approved by: Approved Date:

Reason why payroll expenses are being transferred. (Limit of 254 characters.)
Account renewal was not activated in time for payroll to hit account.

What corrective action will be taken to avoid this type of error in the future? (Limit of 254 characters.)
We will work with ORSPA and sponsor to get accounts activated on time.

Describe why all costs transferred to new accounts are allowable, allocable, and reasonable charges. Additionally, if a sponsored account, describe why costs are appropriate and necessary to the performance of the sponsored project. (Limit of 254 char.
Employee has been working on duties/research related to grant MGS0054 during Fall 2007 semester. Accounts must reflect this.

Earnings Redistribution Transaction

Variable | Static / Calculated

Position	Position Descr	Erncd	Erncd Descr	ASU Acct	Closed Date	Redist Amt
136637	Student Worker II	STH	STH	MGS0054	12/02/2007	120.00
136637	Student Worker II	STH	STH	WH51016	12/02/2007	-120.00

Deduction Redistribution Transaction

Variable | Static / Calculated

Position	Position Descr	Close Date	ASU Acct	Redist Amt
136637	Student Worker II	12/02/2007	MGS0054	0.47
136637	Student Worker II	12/02/2007	WH51016	-0.47

Tax Redistribution Transaction

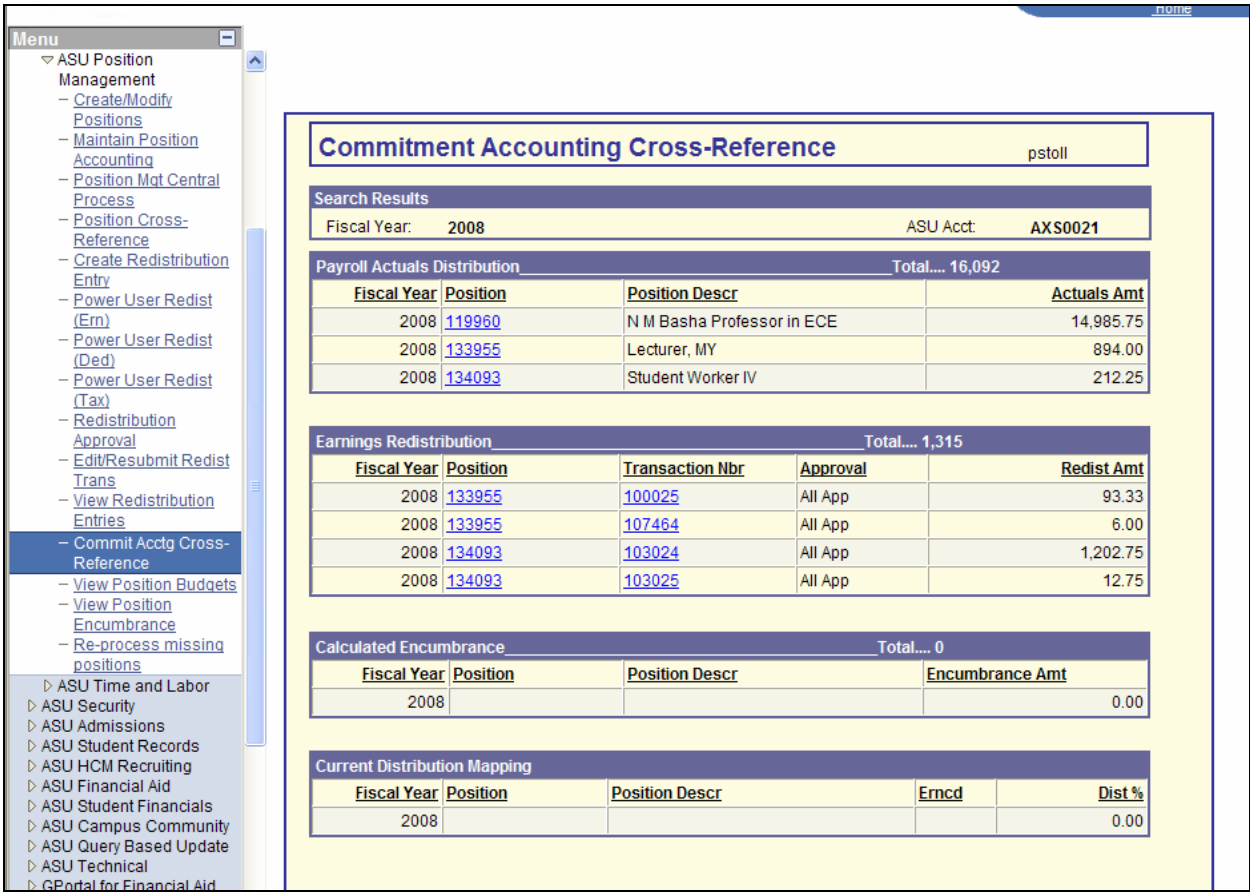
Variable | Static / Calculated

Position	Position Descr	Close Date	ASU Acct	Redist Amt
				0.00

This is the "View Redistribution Transaction" screen.
The top of the screen shows you details about the transaction.
The middle of the screen displays text left by the transaction creator or by the ORSPA team.

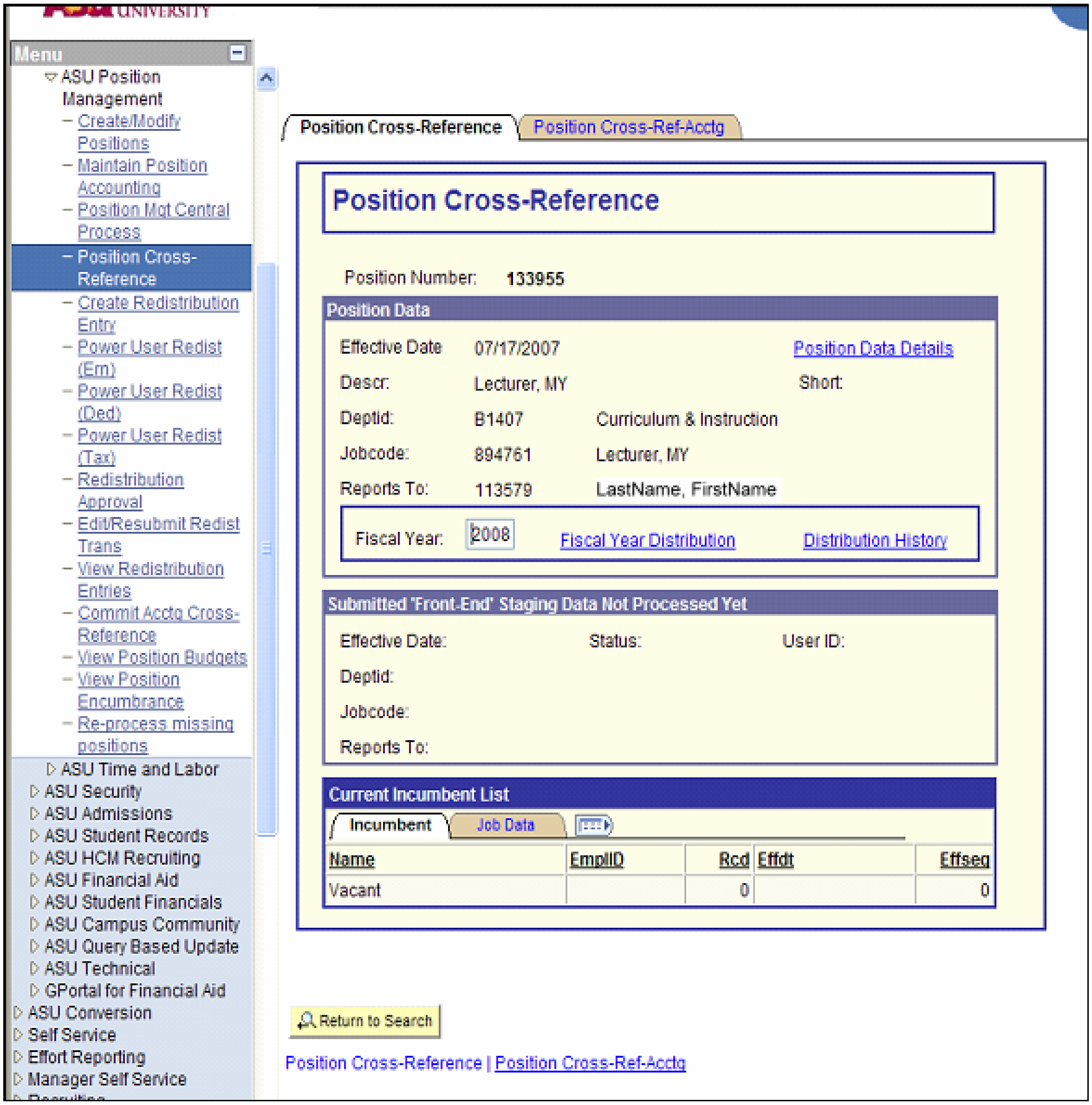
From here you can see further details by clicking on the position link or the ASU Account link.

The next pages show screen examples of each of these pages.



This screen will let you see information about the payroll Actuals and earning redistributions. Clicking on the Position numbers will take you to the position cross reference screen.

Clicking on the transaction numbers will take you back to the transaction redistribution screen, but for the transaction that you clicked on.



This is the position cross reference screen. From here you can see information about the position, the fiscal year distribution and the distribution history.

The people who are assigned to the position will be listed at the bottom of the screen. In this example, the position is currently vacant.

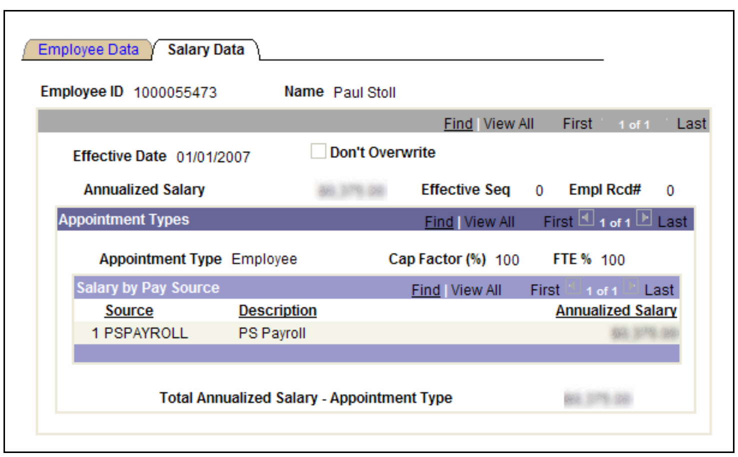
Information Pages

This section will show you the information pages in PeopleSoft that are available from your OR or RA login. This section is more of a reference for the type of information you can find on these pages. When there are other pages that are directly linked to from the first page, each will be displayed with notes about that sub page.

The Effort Reporting Menu

Employee Data

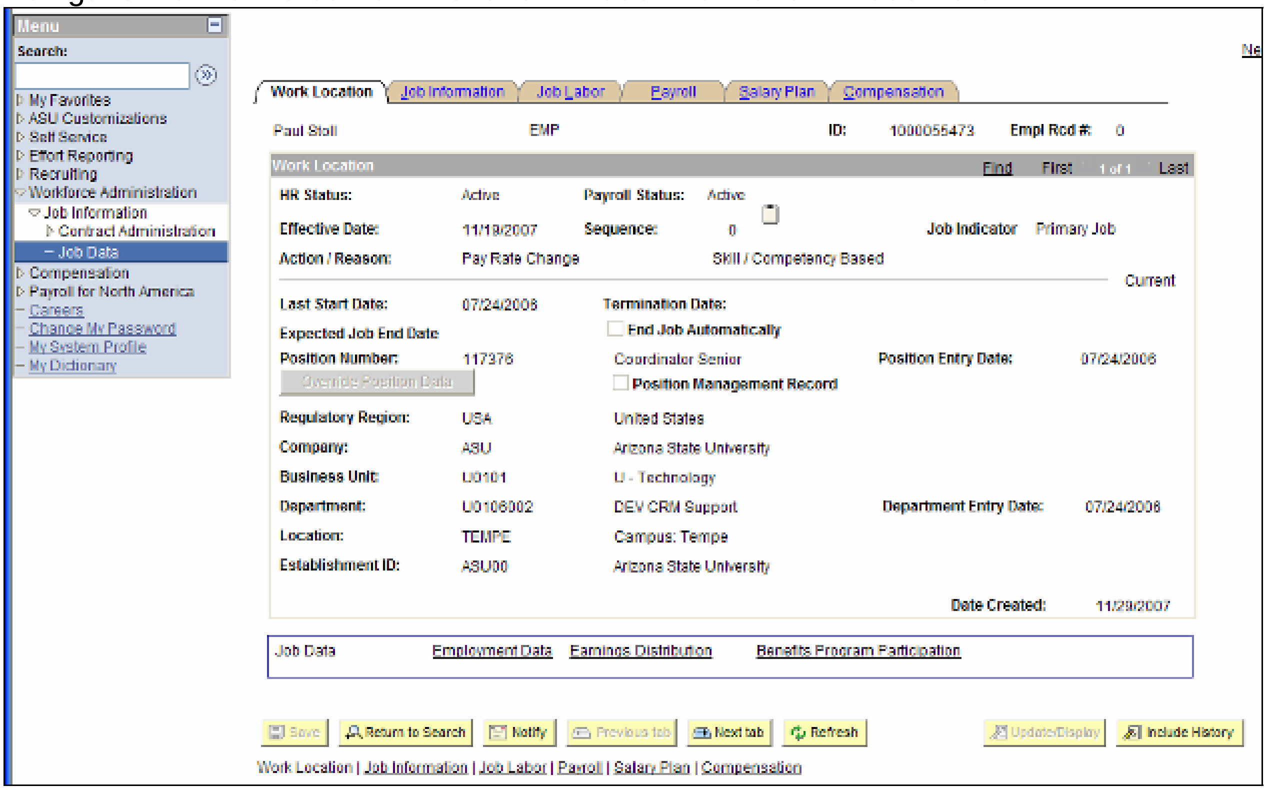
These screens give you a quick snapshot of the employee's employment data. Navigate there at Effort Reporting -> Employee Data.



The WorkForce Administration Menu

Job Data- Work Location Tab

The Job Data pages show you information about a specific employee.
Navigation is Workforce Administration -> Job Information -> Job Data.

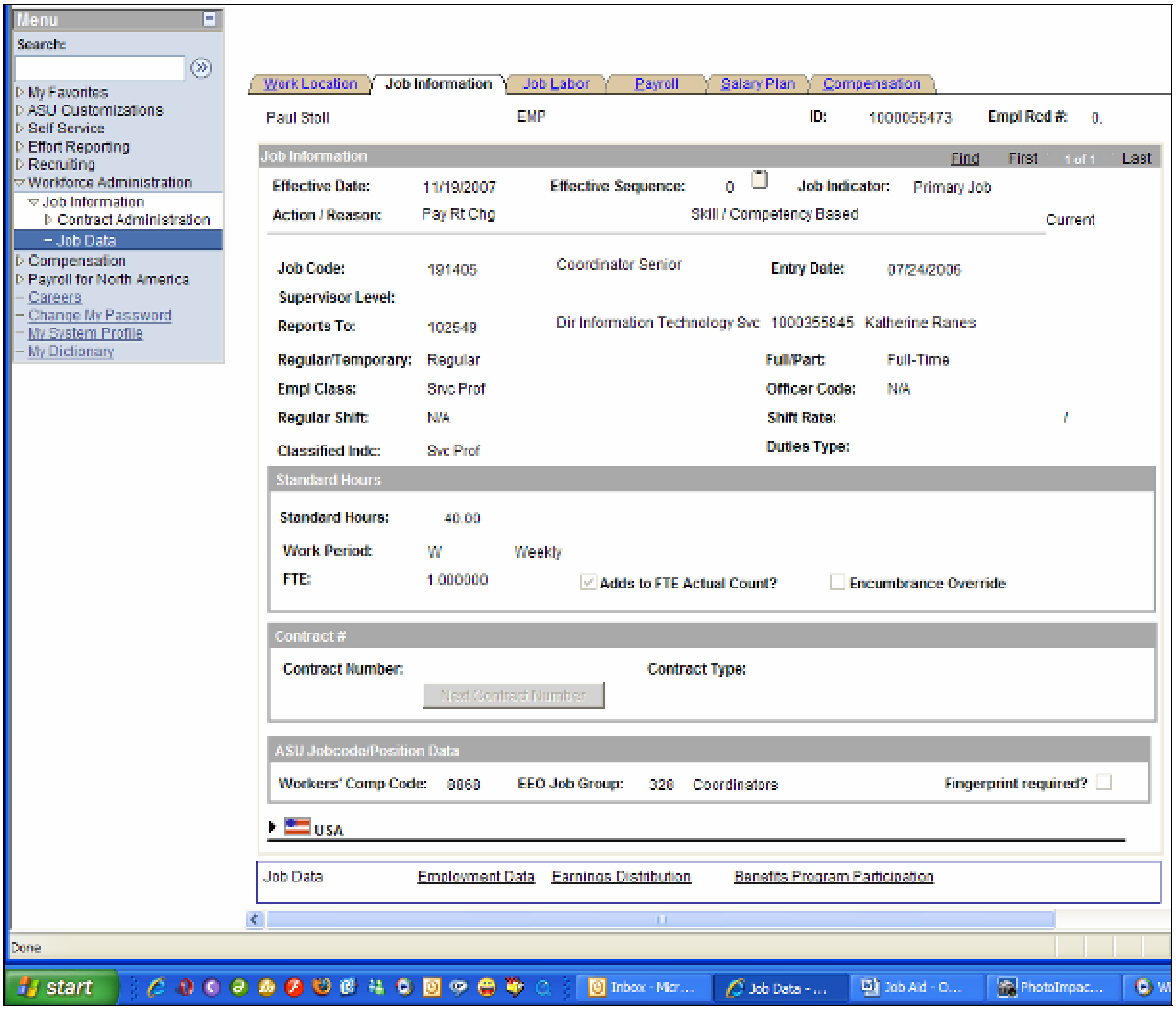


Notes:
Be sure to click on the “include history” button in the lower right corner to see all changes to the employee’s job data.

The Work Location tab shows you the employee’s: business unit, department, campus, position number, payroll status, position entry data and department entry date.

It describes the employee physically and in time.

Job Data – Job Information Tab

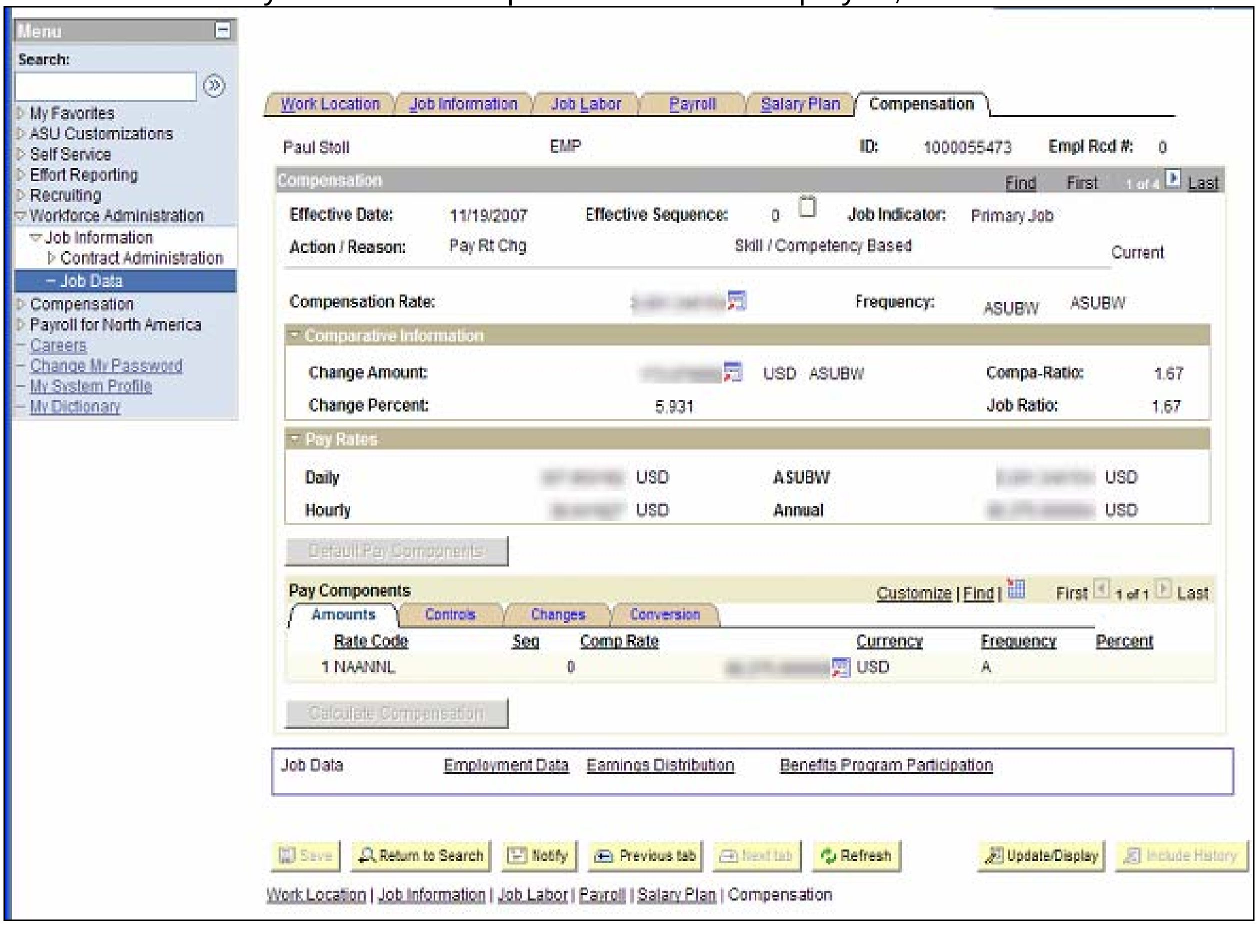


Notes:
This tab shows who the employee reports to, the work schedule and information about a contract if one exists.

The next three tabs, (Job Labor, Payroll and Salary Plan) aren't used.

Job Data – Compensation Tab

This tab will show you the total compensation for the employee, and the rate code

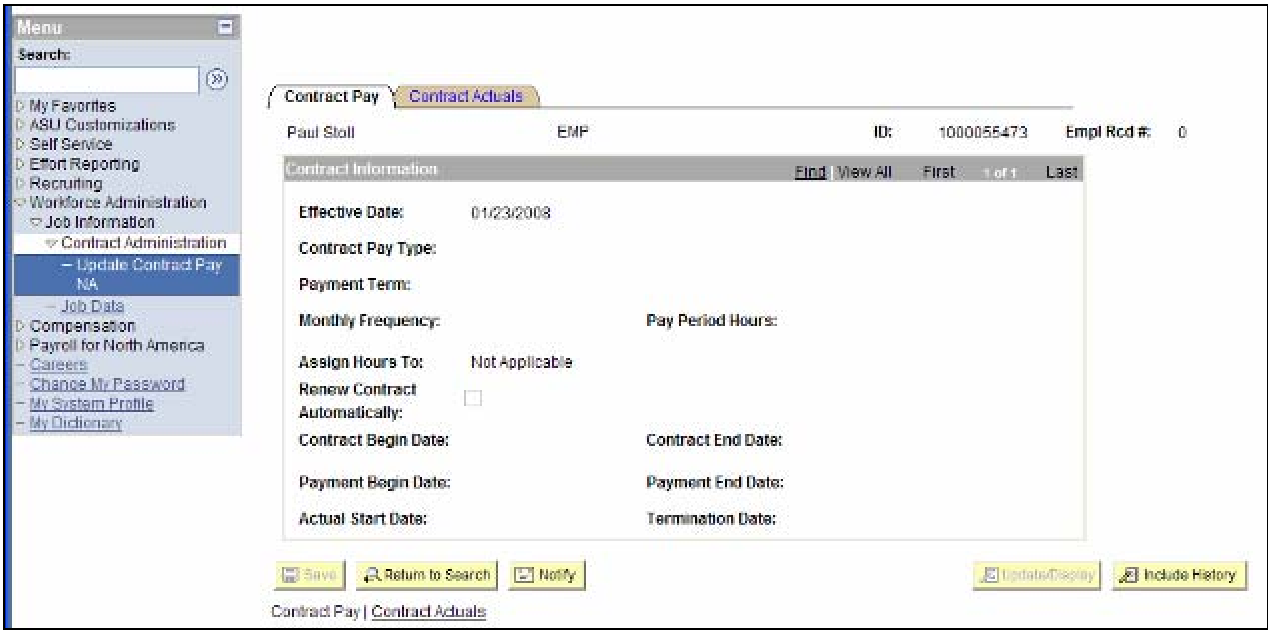


Notes:

The Compensation tab will show the pay rate, comparison information and pay components. The rate codes (displayed in the Pay Components section) are listed in the appendix of this document.

Update Contract Pay NA – Contract Pay Tab

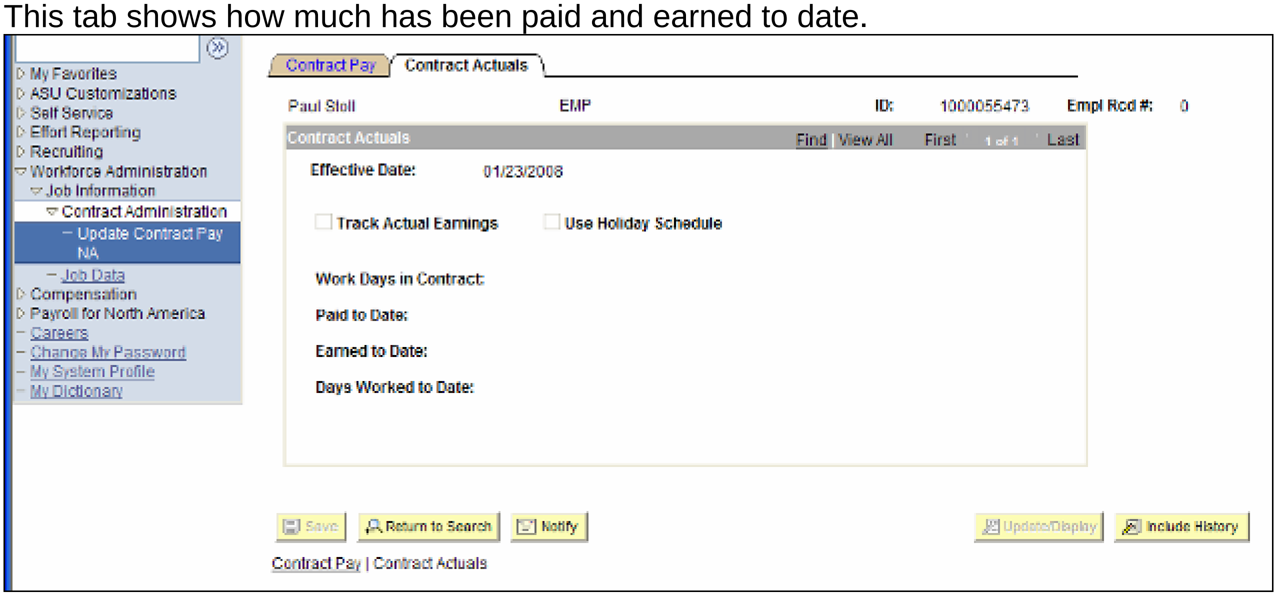
This is the Contract Pay for North America (NA). It shows the details for the current contract, if any for an employee.



Notes:
Be sure to click on the “Include History” button.
You can see on this tab the beginning and ending dates of the current contract, the pay type, term, frequency and how many hours per pay period.

Update Contract Pay NA – Contract Actuals Tab

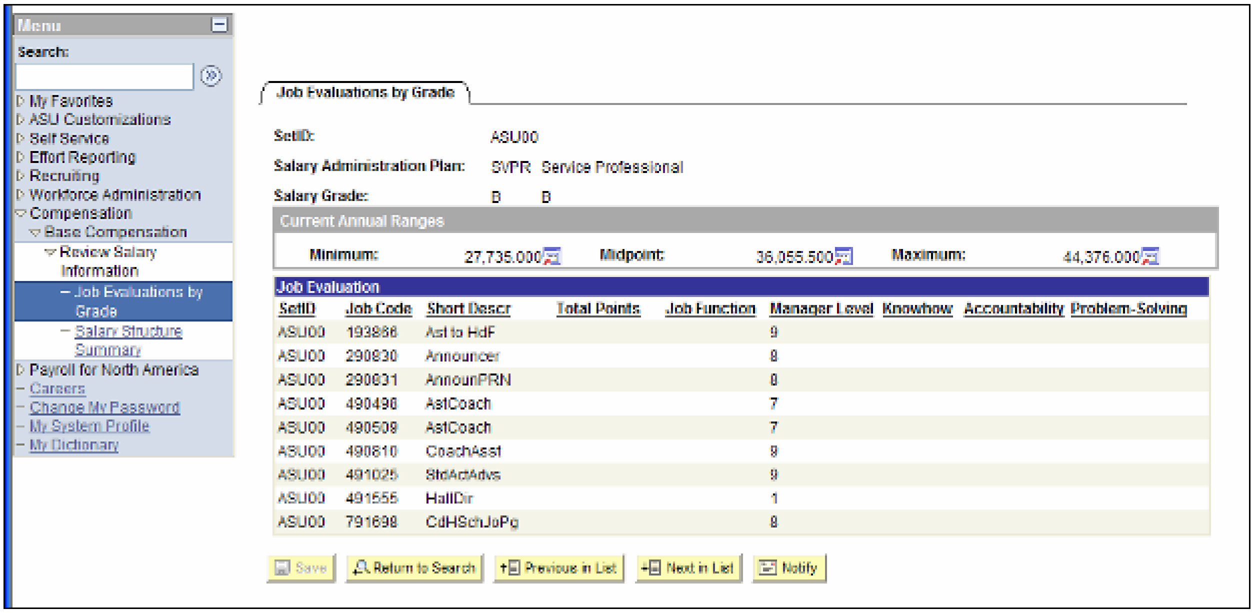
This tab shows how much has been paid and earned to date.



The Compensation Menu

Job Evaluation by Grade

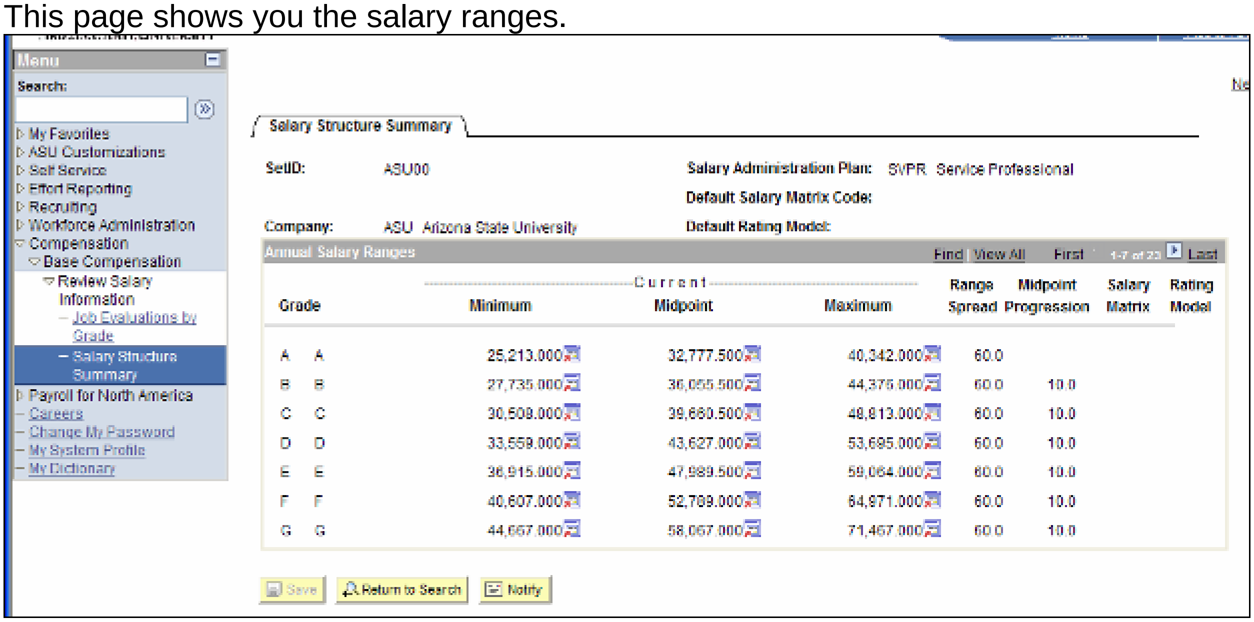
This screen is not about a particular employee, but lets you see the job codes that are assigned a particular salary grade. It also gives you the Salary Range for the selected salary grade.



SetID	Job Code	Short Descr	Total Points	Job Function	Manager Level	Knowhow	Accountability	Problem-Solving
ASU00	193866	Ast to HdF			9			
ASU00	290830	Announcer			8			
ASU00	290831	AnnounPRN			8			
ASU00	490498	AstCoach			7			
ASU00	490509	AstCoach			7			
ASU00	490810	CoachAsst			9			
ASU00	491025	StdActAdvs			9			
ASU00	491555	HallDir			1			
ASU00	791698	CdHSchJoPg			8			

Salary Structure Summary

This page shows you the salary ranges.

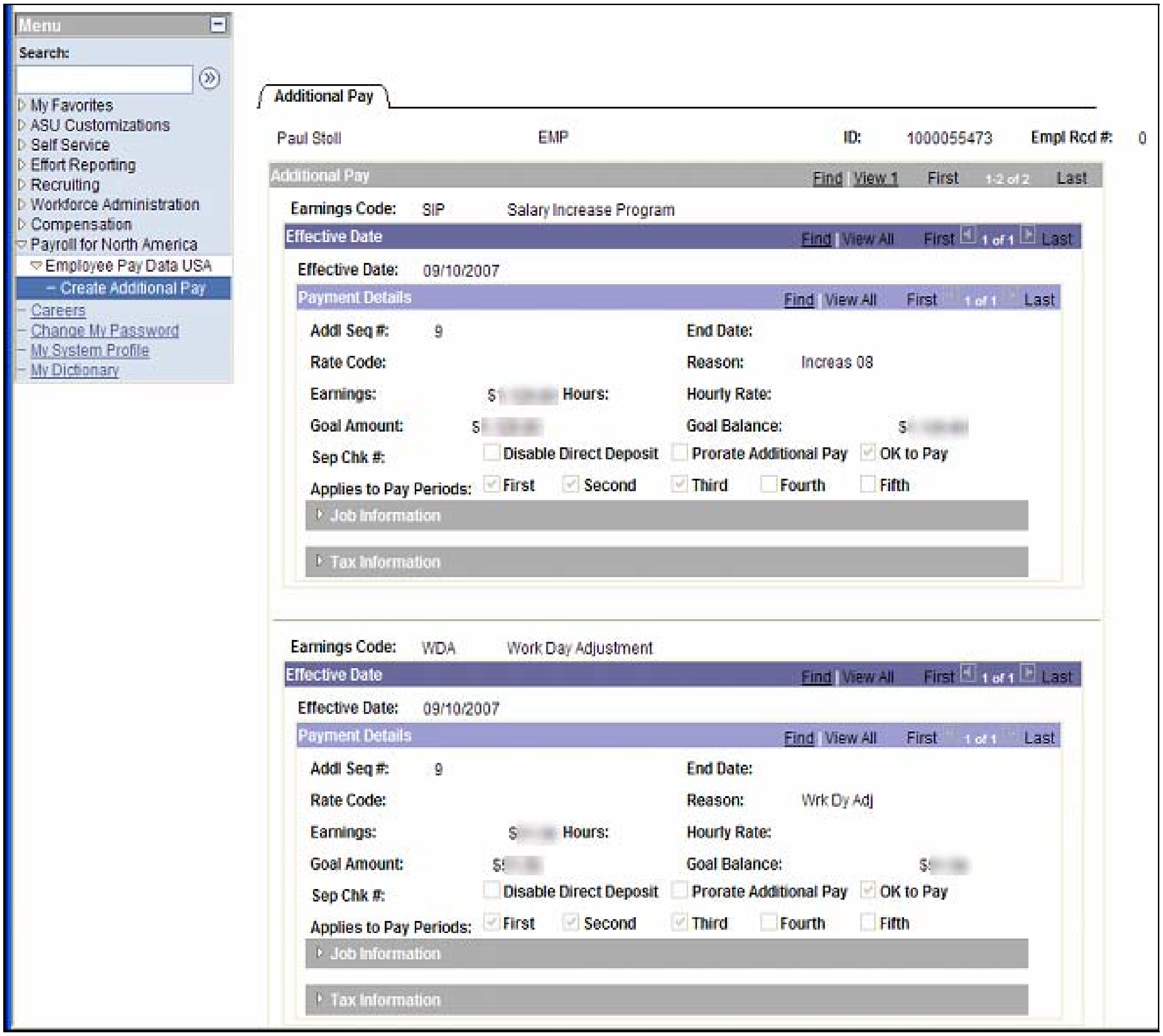


Grade		Minimum	Midpoint	Maximum	Range Spread	Midpoint Progression	Salary Matrix	Rating Model
A	A	25,213.000	32,777.500	40,342.000	60.0			
B	B	27,735.000	36,055.500	44,376.000	60.0	10.0		
C	C	30,508.000	39,660.500	48,813.000	60.0	10.0		
D	D	33,559.000	43,627.000	53,695.000	60.0	10.0		
E	E	36,915.000	47,989.500	59,064.000	60.0	10.0		
F	F	40,607.000	52,789.000	64,971.000	60.0	10.0		
G	G	44,667.000	58,067.000	71,467.000	60.0	10.0		

Payroll for North America Menu

Create Additional Pay

Sometimes an employee will be given auxiliary pay. You can use this screen to view the additional pay that has been given to an employee.



Position Cross Reference Menu

Employees are assigned to positions in Peoplesoft. Positions contain these five criteria:

- Job Class Code
- Job Title
- Job Department
- Reports to and
- Funding

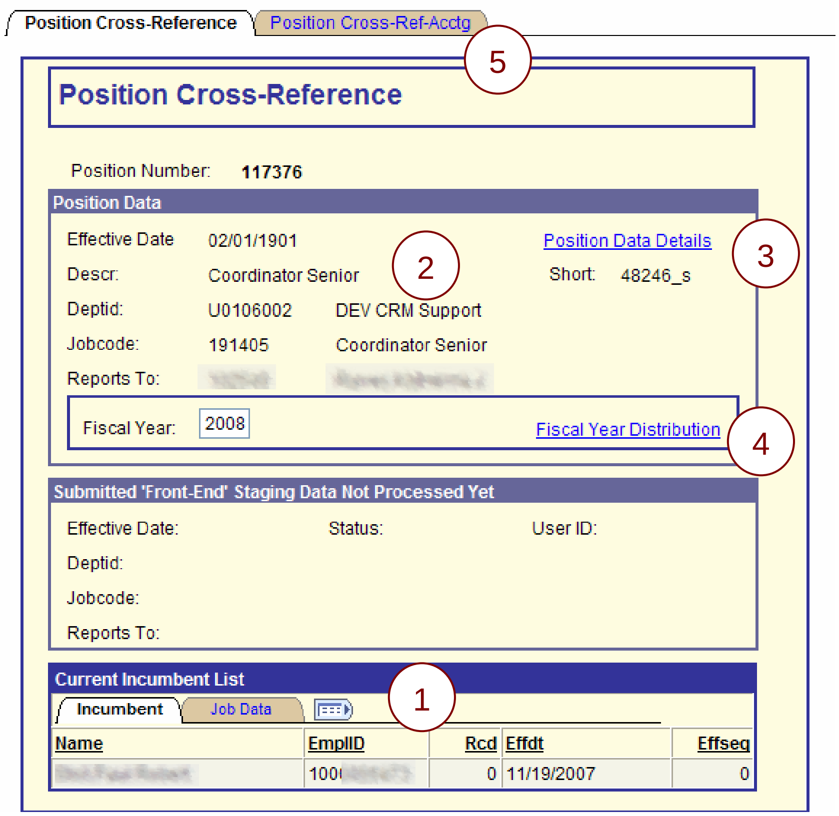
Each time an employee has a unique combination of these five criteria, they should be attached to a unique position number.

To see this page, follow these links:

ASU customization -> ASU Position Management -> Position Cross Reference.

Search for the person or position number you are interested in.

Position Cross Reference Screen



Notes:

1. You can see who the employee (or employees) are in the incumbent list
2. You can see summary data in the Position Data area.

3. Information about the sub page, *Position Data Details*, follows below.
4. Information about the sub page, *Fiscal Year Distribution,* follows below.
5. Information about the sub page, *Position Cross Ref-Acctg,* follows below.

Position Data Details Screen

This screen is displayed by clicking on the *Position Data Details* link on the previous screen.

Position Data Details

Position Data Details

Position:	117376	Effdt:	02/01/1901
Descr:	Coordinator Senior	Eff Status:	Active

Action Reason:	Position Conversion	
Business Unit:	U0101	
Deptid:	U0106002	DEV CRM Support
Jobcode:	191405	Coordinator Senior

Std Hours:	40.00		☑ Budgeted Position
Max Head Count:	1		☐ Fingerprint required
FTE:	1.000000	Budgeted FTE:	1.000

Reports To:	102549	Dir Information Technology Svc
Sal Admin Plan:	SVPR	Service Professional
Grade:	E	
EEO Job Group:	328	
Workers' Comp:	8868	

Class Indc:	Service Professional
Full/Part:	Full-Time
Reg/Temp:	Regular
Academic Rank:	

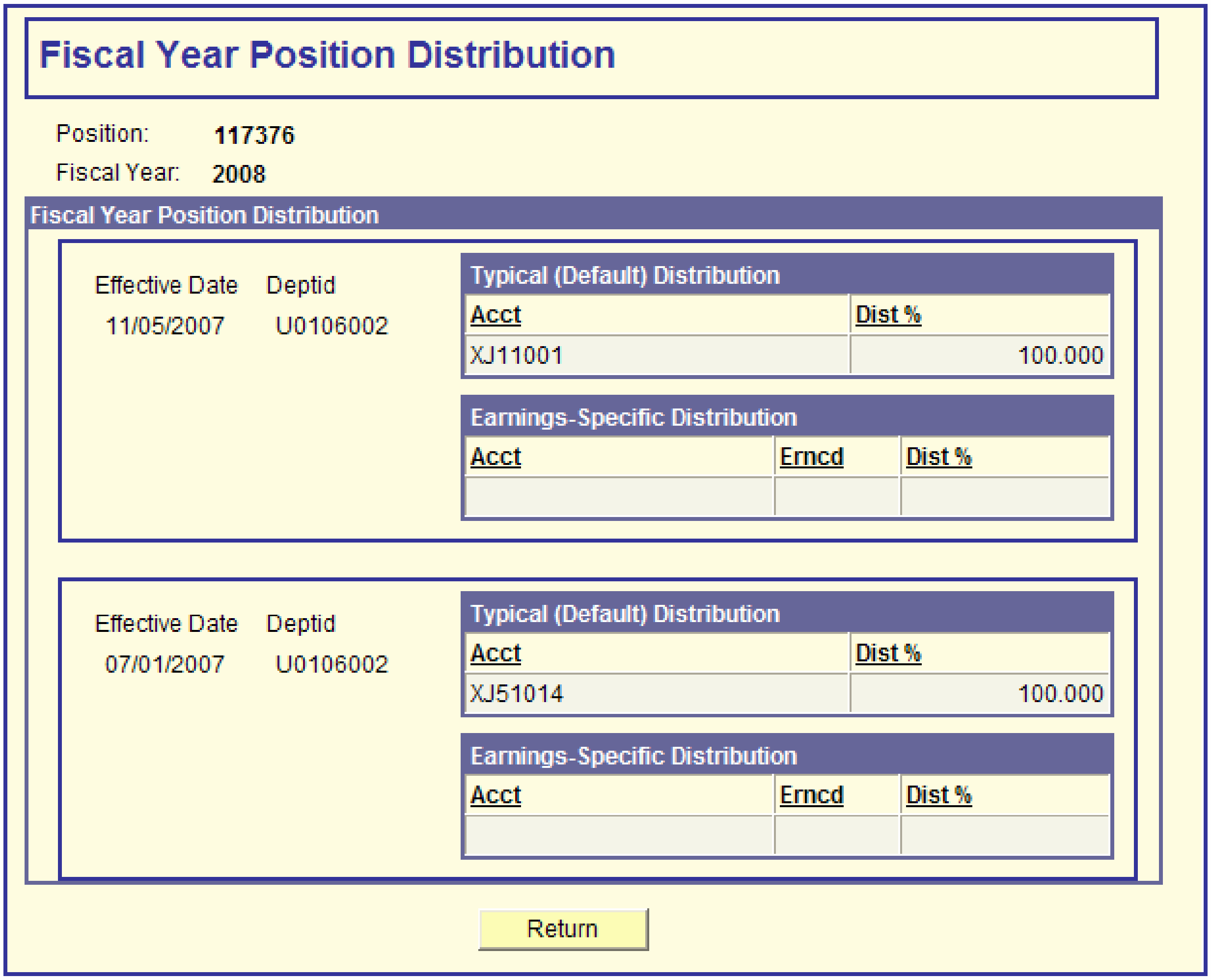
Long Title: Coordinator Senior

Return

Notes:
Notice that now you can see the number of hours, the percent of Full Time Employee, whether the position is a budgeted position or not. What grade level and EEO Job Group.
Click *Return* to go back to the main cross reference page.

FY Distribution

This is the distribution for this fiscal year of the funding sources for this position.



Fiscal Year Position Distribution

Position: **117376**
Fiscal Year: **2008**

Fiscal Year Position Distribution

Effective Date: 11/05/2007
Deptid: U0106002

Typical (Default) Distribution

Acct	Dist %
XJ11001	100.000

Earnings-Specific Distribution

Acct	Erncd	Dist %

Effective Date: 07/01/2007
Deptid: U0106002

Typical (Default) Distribution

Acct	Dist %
XJ51014	100.000

Earnings-Specific Distribution

Acct	Erncd	Dist %

Return

Notes:
This page displays when you click on the *Fiscal Year Distribution* link from the main Position cross reference page. It shows the funding source distribution for the current fiscal year. This is the place where you can see different earning codes and what amount is allotted to each. Earning codes are listed in the appendix of this document.

Position Cross Reference Accounting Screen

Position Cross-Reference | Position Cross-Ref-Acctg

Position Accounting Cross-Reference

OR_BIBSY

.Position / Fiscal Year

Position **117376** Coordinator Senior

Fiscal Year: **2008**

Payroll Actual Earnings Distribution

Fiscal Year	ASU Acct	EmplID	Rcd	Name	Actuals Amt
2008	XJ11001	1000[illegible]	0	S[illegible]	[illegible]
2008	XJ51014	1000[illegible]	0	S[illegible]	[illegible]

Earnings Redistributions

Fiscal Year	ASU Acct	EmplID	Rcd	Transaction Nbr	Approval Status	Redist Amt
	ASU Acct	1000[illegible]	0	0		0.00

Calculated Encumbrance

Fiscal Year	ASU Acct	EmplID	Rcd	Name	Encumbrance Amt
2008	XJ11001	10000[illegible]	0	S[illegible]	[illegible]

Current Position Budget

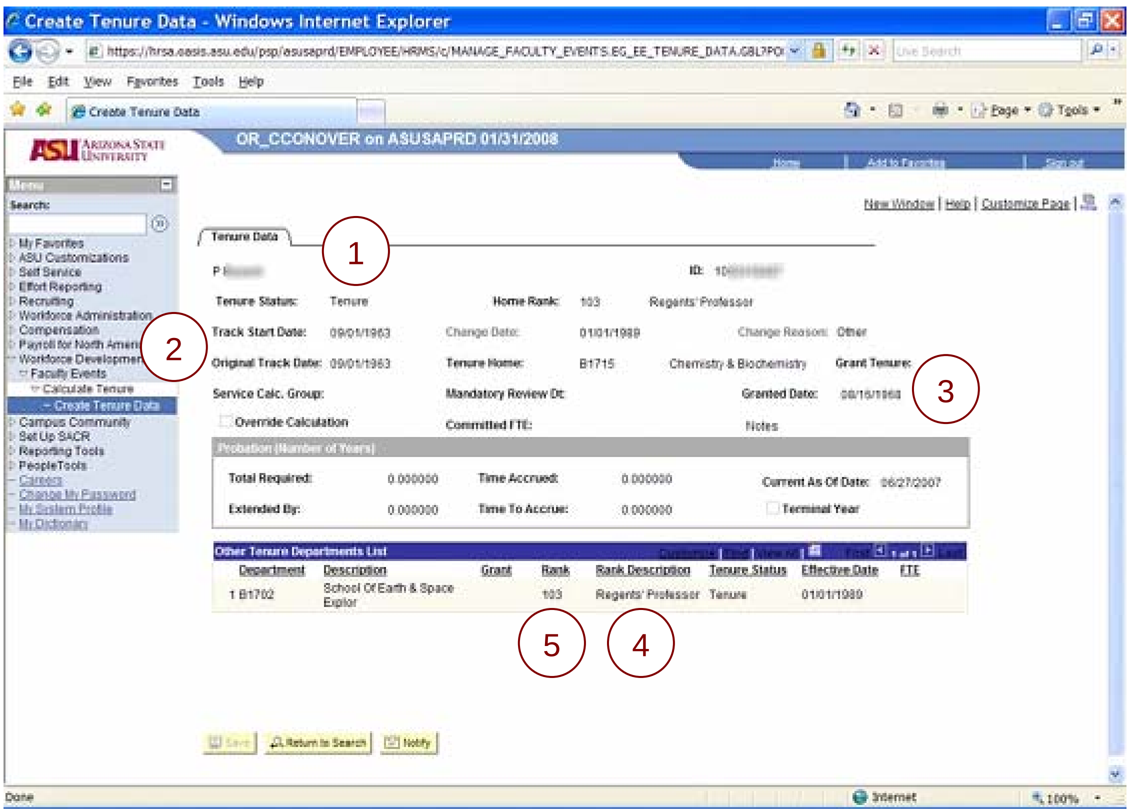
Fiscal Year	ASU Acct	Budget Amt
	ASU Acct	0

Notes:
This will show you what has been paid during this fiscal year, what is encumbered and what the current position budget is.

View Tenure Data

This page will let you see the tenure information for a faculty member.

To see this page, follow these links:
Workforce Development -> Faculty Events -> Calculate Tenure -> Create Tenure Data.
Search for the person you are interested in.



Notes:

1. You can see the current tenure status
2. You can see track dates: (Start and Original).
3. You can see the granted date
4. You can see the Ranks Description
5. You can see the Rank

View Redistribution Transaction

This screen will show you details when funds have been redistributed. Note that this screen involves position numbers, not specific employees.

To see this page, follow these links:
ASU customization -> ASU Position Management -> View Redistribution.
Search for the position number you are interested in.

View Redistribution Transaction

pstoll

Search Results

Transaction Nbr:	**141548**	Approval Status:	All Approved
Fiscal Year:	2008	Pay End Date:	12/02/2007
EmplID / Rcd:	1000000000 / 2	GL Post Date:	05/13/2008
Submitted by:	OR_BFINLEY Jensen,Babette Finley	Submitted Date:	05/11/2008
Approved by:		Approved Date:	

Reason why payroll expenses are being transferred. (Limit of 254 characters.)
Account renewal was not activated in time for payroll to hit account.

What corrective action will be taken to avoid this type of error in the future? (Limit of 254 characters.)
We will work with ORSPA and sponsor to get accounts activated on time.

Describe why all costs transferred to new accounts are allowable, allocable, and reasonable charges. Additionally, if a sponsored account, describe why costs are appropriate and necessary to the performance of the sponsored project. (Limit of 254 char.
Employee has been working on duties/research related to grant MGS0054 during Fall 2007 semester. Accounts must reflect this.

Earnings Redistribution Transaction 1

Variable | Static / Calculated

Position	Position Descr	Erncd	Erncd Descr	ASU Acct	Closed Date	Redist Amt
136637	Student Worker II	STH	STH	MGS0054	12/02/2007	120.00
136637	Student Worker II	STH	STH	WH51016	12/02/2007	-120.00

Deduction Redistribution Transaction

Variable | Static / Calculated

Position	Position Descr	Close Date	ASU Acct	Redist Amt
136637	Student Worker II	12/02/2007	MGS0054	0.47
136637	Student Worker II	12/02/2007	WH51016	-0.47

Tax Redistribution Transaction 2

Variable | Static / Calculated

Position	Position Descr	Close Date	ASU Acct	Redist Amt
				0.00

Notes:

1. You can see Earnings redistribution transactions and
2. You can see Tax Redistribution transactions.

Resources

Help Desk

If you have questions about using these pages, you can contact the help desk at 965-6500, or open your own help desk case at www.asu.edu/support, click on “create case’

Job aid page

We have a page full of job aids and information on using PeopleSoft: www.asu.edu/oasis/support/JobAids.html

Effort Reporting Page

Updates on effort reporting have been added to the site: http://researchadmin.asu.edu/effortreporting