PeopleSoft HCM 9.0 Tutorial
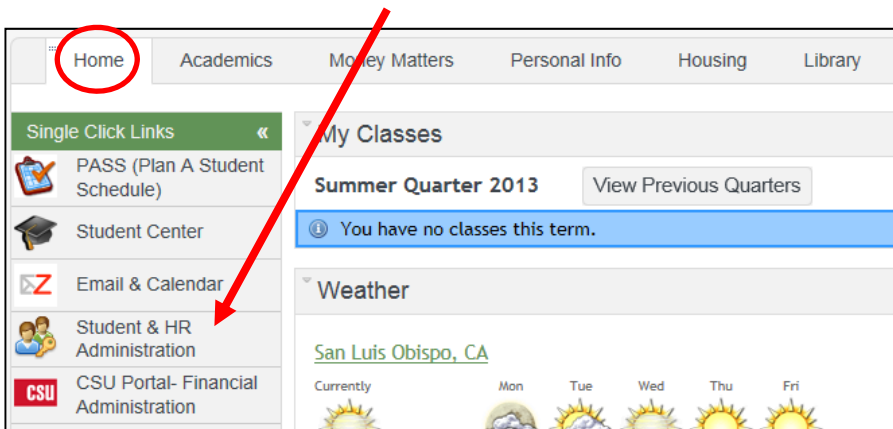
To access Oracle/PeopleSoft Human Resources pages, first navigate to the Cal Poly homepage – **www.calpoly.edu.** Click the My CalPoly link to get to the Portal login page.

Type in your CalPoly Username and Password then click the LOGIN button.

Click on the Home Tab if it is not already displayed, then click on the Student & HR Administration link to access PeopleSoft.

When logged in, you will see a left-hand menu containing pages you may access.
Please note: Page access is based upon your job duties.
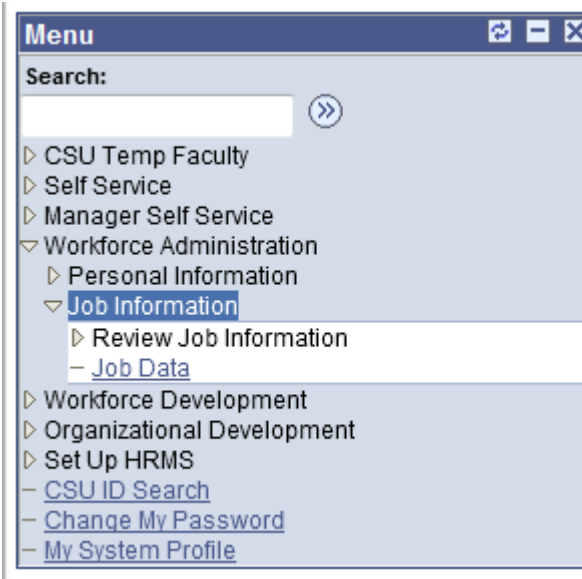

There are three methods of navigating through the menus

Option 1: Click on the triangle bullet to the left of Job Information to display the sub-folders. Click on Job Data to open the Job Data Search page.

In this example, we've clicked on the triangle bullet to the left of Workforce Administration to reveal the sub-folders.
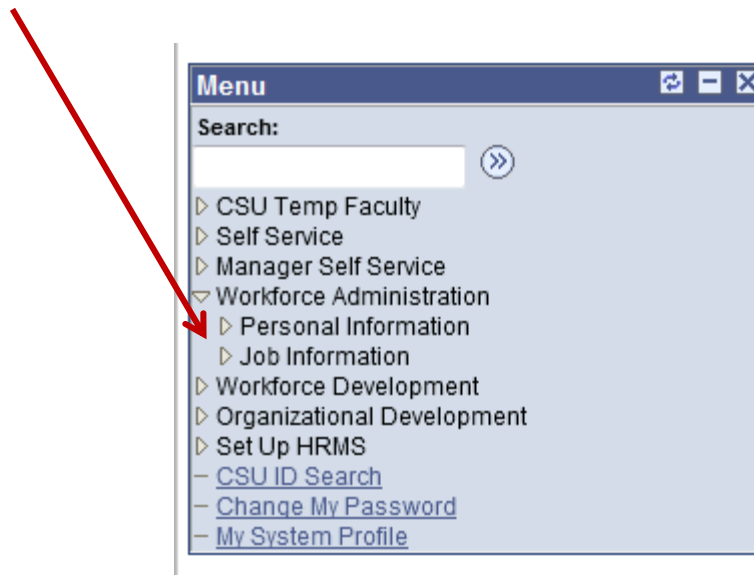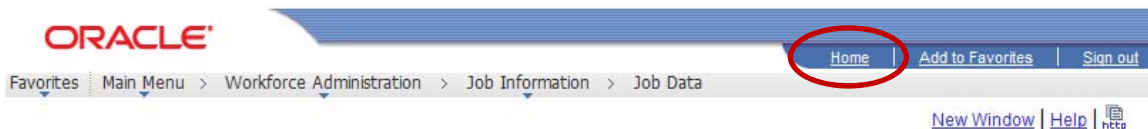
Option 2: Click on the Workforce Administration title to display the 'portal-like' navigation. This method allows most sub-folders to display with one click.

Notice the left hand menu disappears when navigating via the portal view. To display the left hand menu click the Home link in the upper right corner of the window.

Option 3: Once you navigate from the Main Menu, you will see the breadcrumb navigation display along the top of the page. When navigating via the breadcrumbs horizontal floating menus appear.
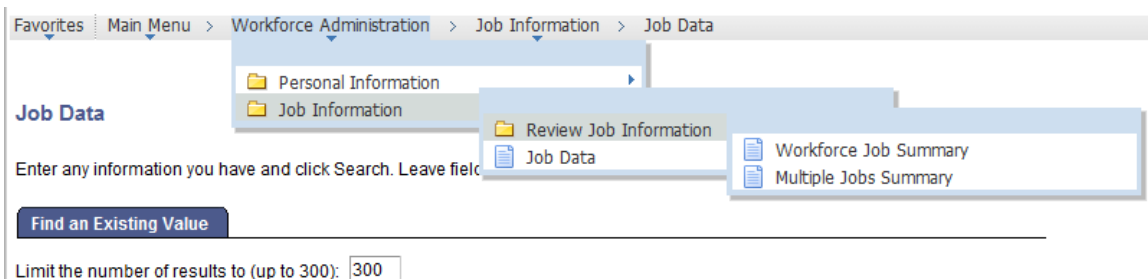
Once in Job Data there are multiple ways to search for employees

1. User defined search criteria allows flexibility
2. Drop-down menus provide "wildcard" functionality

Job Data

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

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID:	begins with ▾	
Empl Rcd Nbr:	= ▾	
Name:	begins with ▾	
Last Name:	begins with ▾	
Department SetID:	begins with ▾	🔍
Department:	begins with ▾	🔍
Department Description:	begins with ▾	
HR Status:	= ▾	▾
Job Code SetID:	begins with ▾	🔍
Job Code:	begins with ▾	🔍

☐ Include History ☐ Case Sensitive

[Search] [Clear] Basic Search 💾 Save Search Criteria

begins with ▾
- begins with
- contains
- =
- not =
- <
- <=
- >
- >=
- between
- in

Page Functionality

You can open multiple windows by clicking on the New Window link.

Some rows may not appear when the page is displayed. Click the View All link to view all rows.

ORACLE

Favorites | Main Menu > Workforce Administration > Job Information > Job Data

New Window | Help | Cus

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

Kinsey Milhone   EMP   ID: 008351209   Empl Rcd #:

Work Location   Find | View All   First ◄ 1 of 1 ► Last

HR Status: Active   Payroll Status: Active   [Go To Row] ⊞ ⊟
*Effective Date: 05/01/2012 📅   Sequence: 0   *Job Indicator: Primary Jo ▾
*Action: Hire   ▾   Reason: Appointment   ▾
                                                                       Current

Last Start Date: 05/01/2012   Termination Date:
Expected Job End Date 06/30/2013 📅

                                                       Position Entry Date: 05/01/2012

Position Number: 00002038 🔍   Admin Support Assistant 12 Mo
[Override Position Data]   ☐ Position Management Record

Regulatory Region: USA   United States
Company: SLO   Cal Poly - SLO
Business Unit: SLCMP   Cal Poly, San Luis Obispo   Department Entry Date: 05/01/2012

Click the 'Go To Row' button to navigate to a specific page or date of action.

My Favorites

You have the ability to name and store user favorites based on login to the server.
To add favorites, navigate to a page that you use frequently (in this example Job Data)
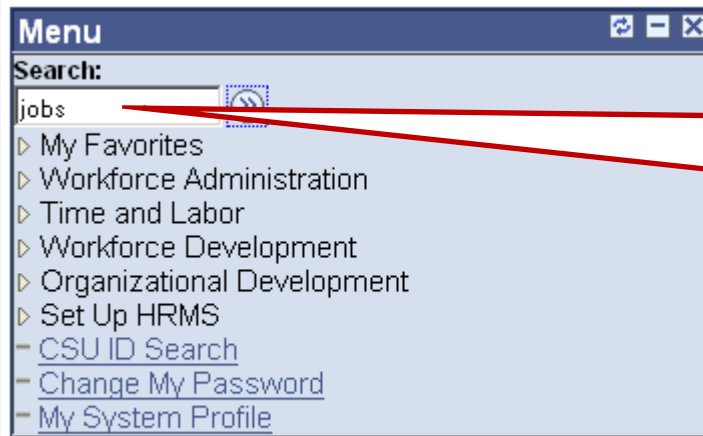and click on either the Add to Favorites.
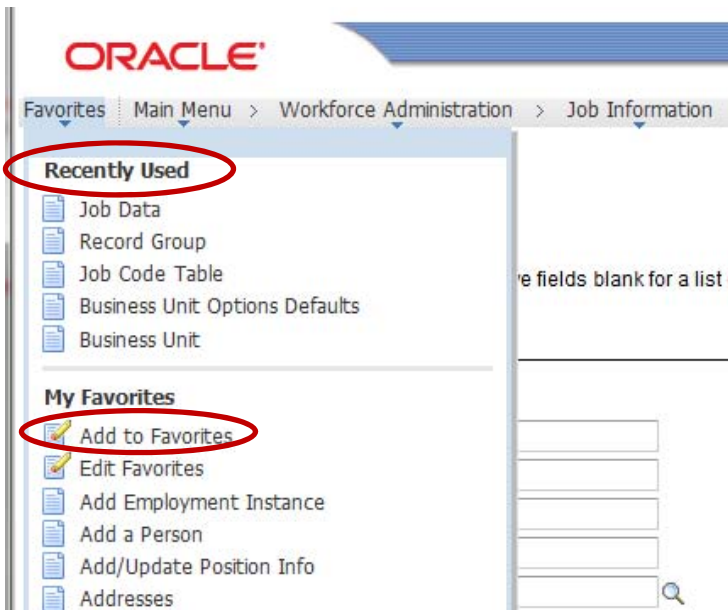
Enter your own description of your favorite page or use the page name that appears in
the Description box then save by clicking the OK button.
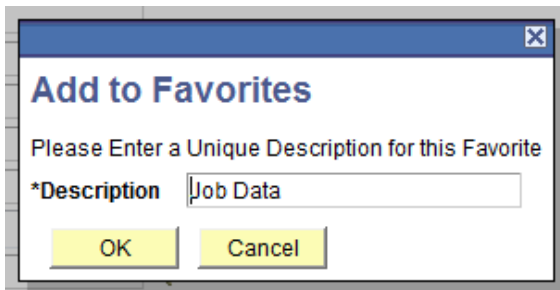
To access your Favorite pages, click on the My Favorites link and click the link.

Searching for a page by keywords or topic

You also have the ability to search for a page by using this Search box. Just enter a word or phrase and click the search button.

Your search results will only include pages that your security allows you to access.

Logging out of PeopleSoft

Click the 'X' in the upper right corner of the window or click the 'Sign out' link
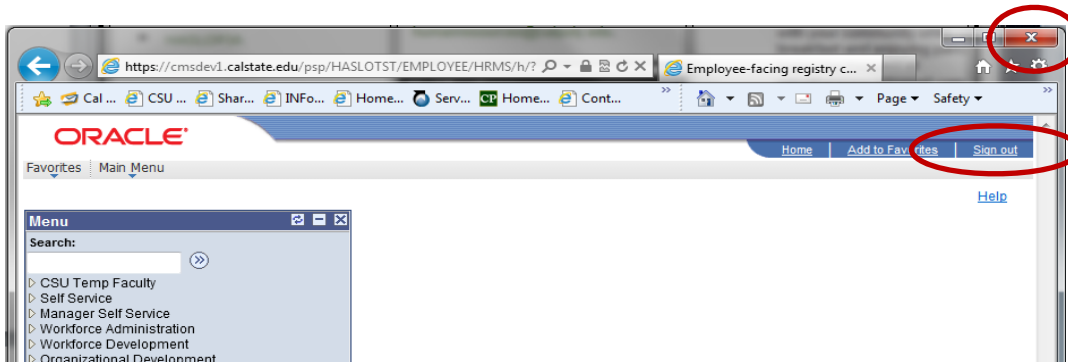
Timeout

PeopleSoft automatically times out after 45 minutes of idle time. A reminder message will appear before the system times out. The portal has similar time out security and will time out as well.   To return to PeopleSoft, log back into my.calpoly.edu.