

## Task Navigation in PeopleSoft 8.9 HRMS

Task	Navigation	Directions
<b>Search for a Person</b>	Main Menu > Workforce Administration > Personal Information > Search for Matching Persons	Use Name, Birth date, SSN to see if the person already exists
<b>Adding (Hire) a New Employee</b>	Main Menu > Workforce Administration > Personal Information > Add a Person	Follow steps to enter Personal & Job Data
<b>Adding a Non-Employee (Person)</b>	Main Menu > Workforce Administration > Personal Information > Add a Person	Follow steps to enter Personal information & Organizational Relationship
<b>Adding a job for existing Employee Hiring an existing POI</b>	Main Menu > Workforce Administration > Job Information > Add an Employment Instance	
<b>Rehire an Existing Employee</b>	Main Menu > Workforce Administration > Job Information > Transfer/Rehire <b>OR</b> Main Menu > Workforce Administration > Job Information > Add an Employment Instance	Follow steps to enter the employee and new effective date on the appropriate job record
<b>Adding a New or Additional POI Type</b>	Main Menu > Workforce Administration > Personal Information > Organizational Relationships > Add a POI Relationship	Add a new relationship for the existing person (non-employee) or employee.
<b>To find a page, enter key word &amp; click on the</b>	<b>Search:</b>	For example, enter Job – to find all Job pages.
<b>My Favorites – Save specific pages for easy access</b>	<a href="#">Add to Favorites</a> In menu line at the top of your page	Go to page, such as Add a Person, click on Add to Favorites to save.
<b>Reports &amp; Reviews</b>	Main Menu > Reports and Reviews	Recommended reports and online reviews
<b>To View Reports, use Report Manager</b>	Main Menu > Reporting Tools > Report Manager <b>or</b> <i>Report Manager</i> appears at top each Report Run Control Page	Run your report; click on Report Manager; click on the report name to view the output once complete

### Steps to Enter a Person in PeopleSoft

Search for Matching Person in HRMS			
In HRMS		Not In HRMS	
EMPLOYEE	POI	EMPLOYEE	POI
<b>Rehire or Add Additional Job</b>	<b>Add Organizational Relationship or Hire</b>	<b>Add (Hire) a New Employee</b>	<b>Add a Non-employee (Person)</b>
Step by Step Guides: Hire Retiree Transfer or Rehire Add Employment Instance	Step by Step Guides: Add POI Relationship Add Employment Instance	Step by Step Guides: Hire Regular Faculty Contract Pay Hire (see appropriate Contract Pay guide) Hire Student Hourly / Work Study Hire Classified Employee	Step by Step Guides: Add a Person

# PeopleSoft 8.9 Changes

## Menu Changes

PS 8.3 Menu	PS 8.9 Menu
Administer Workforce> Personal Data	<a href="#">Workforce Administration&gt; Personal Information&gt; Modify a Person</a>
Administer Workforce> Hire	<a href="#">Workforce Administration&gt; Personal Information&gt; Add a Person&gt;Employee</a>
Administer Workforce> Non-Employee	<a href="#">Workforce Administration&gt; Personal Information&gt; Add a Person&gt;POI Type</a>
Develop Workforce> Manage Positions	<a href="#">Organizational Development&gt; Position Management</a>
Develop Workforce> Administer Training	<a href="#">Enterprise Learning</a>

## Functionality Changes

- When using the Name field in PeopleSoft 8.9, a space has been added between the comma and first name.

PS 8.3	PS 8.9
Last Name,First Name – Ex Smith,John	<a href="#">Last Name,&lt;space&gt; First Name – Ex Smith, John</a>

- When results appear in a list, use the underlined fields to resort the list. For example, click Name to sort by name.

### Search Results

View All							First	1-62 of 62		Last
EmplID	Empl Rcd Nbr	Name	Last Name	Department	Last 4 SSN	HR Status	Employee Status			
101012	0	Farmer,Marjorie	FARMER	51000	000-00-6633	Active	Active			
103218	0	Harvey,Rachael	HARVEY	51000	000-00-7613	Active	Active			
103256	0	Jamieson,Jason	JAMIESON	51000	000-00-7521	Active	Active			

Now sorts by last name

EmplID	Empl Rcd Nbr	Name	Last Name	Department	Last 4 SSN	HR Status	Employee Status
120577	1	Abdulhafiz,Barbara	ABDULHAFIZ	51000	000-00-2653	Active	Active
123724	0	Adams,Marguerite	ADAMS	51000	000-00-1812	Active	Active

- Hot Key and Shortcuts

Hot Key	Action
<b>CTRL+ K</b>	When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
<b>F11</b>	Maximizes the page (helpful for data entry). Press again to return to normal view.
<b>Menu</b>	Minimizes the PeopleSoft Menu
	Maximizes the PeopleSoft Menu
	Download data in the grid into Excel
	Click this button next to the person in Search for Matching Persons. Navigate to Modify a Person or Job Data and the ID will be placed in the EMPLID field.
<a href="#">Customize</a>	
My Favorites	