Baruch COLLEGE
OFFICE OF HUMAN RESOURCES

# PeopleSoft Self Service Applications

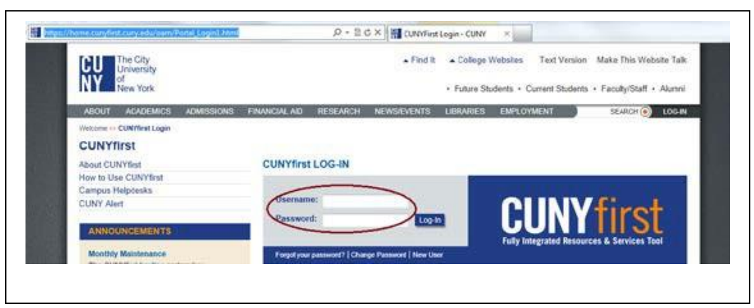
PeopleSoft Self-Service Human Resources allows your workforce to update and use employee specific Information, online via **CUNYfirst**, that is personalized to an individual's role, experience, work content, language, and information needs. By allowing managers and employees to access and manage information and transactions in a paperless environment, you can streamline business processes, decrease costs, and improve service. With managers and employees empowered to update and maintain their own information. Communication between manager, employee, and HR is faster and more efficient.

**Manager Self Service (MSS)** is a tool for managers to manage their employee's job specific data.
**Employee Self Service (ESS)** allows employees to view and change their personal data.

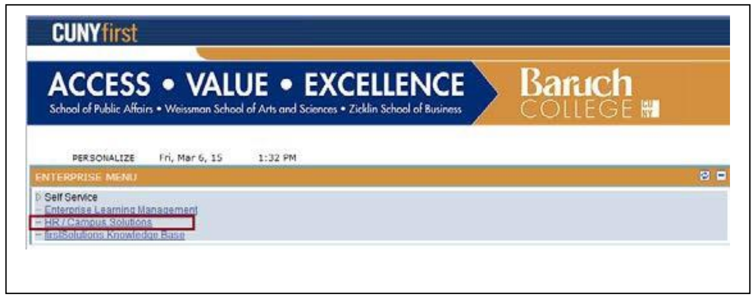
## PeopleSoft Manager Self-Service (MSS)

PeopleSoft Manager Self Service (MSS) allows the manager to view a variety of information for the employees who report to them. This guide will step through the following items:

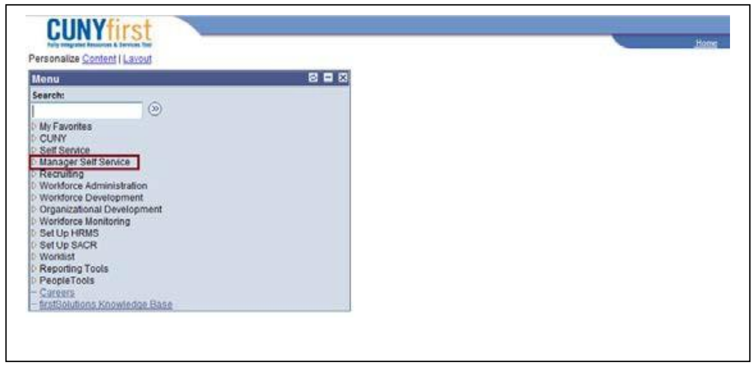
**A. Job and Personal Information**

| Basic PeopleSoft Access Log-In Steps | |
|---|---|
| 1. Please sign into PeopleSoft Human Resources through the CUNYfirst portal at [https://home.cunyfirst.cuny.edu/oam/Portal_Login1.html](https://home.cunyfirst.cuny.edu/oam/Portal_Login1.html) |   |

2. Once you provide **CUNYfirst** user id/password and upon successful login you are in **PeopleSoft Enterprise Menu** application.

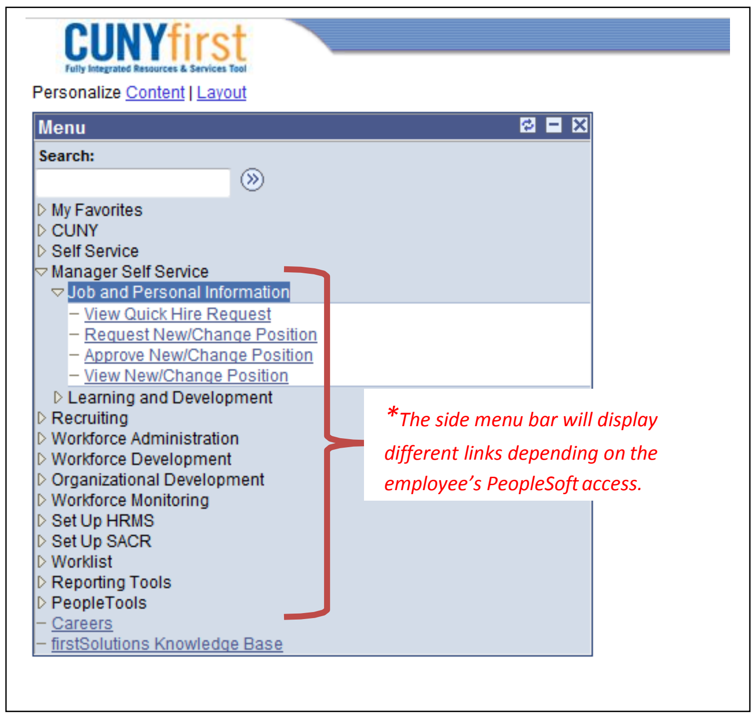



3. Click on ***HR / Campus Solutions*** and a new application window tab opens up and select ***Manager Self Service*** menu and will expand menu items

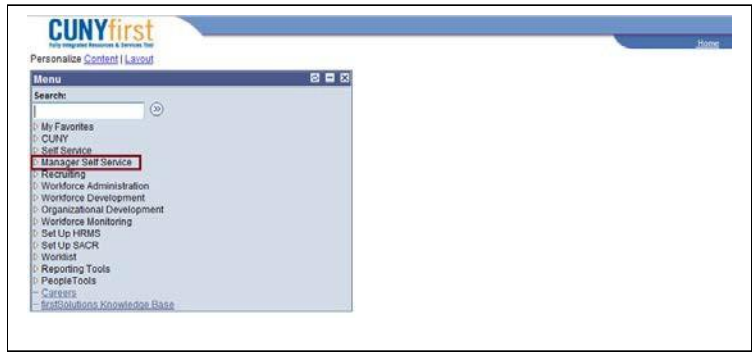
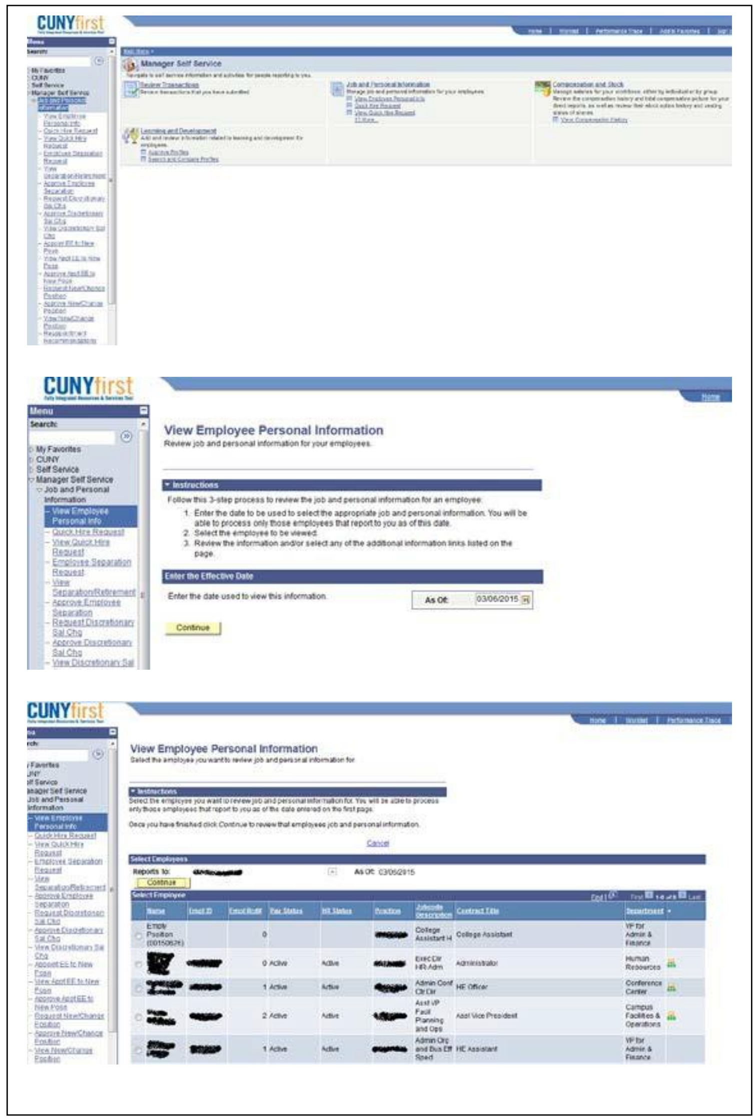



- Using **the displayed side menu bar.**

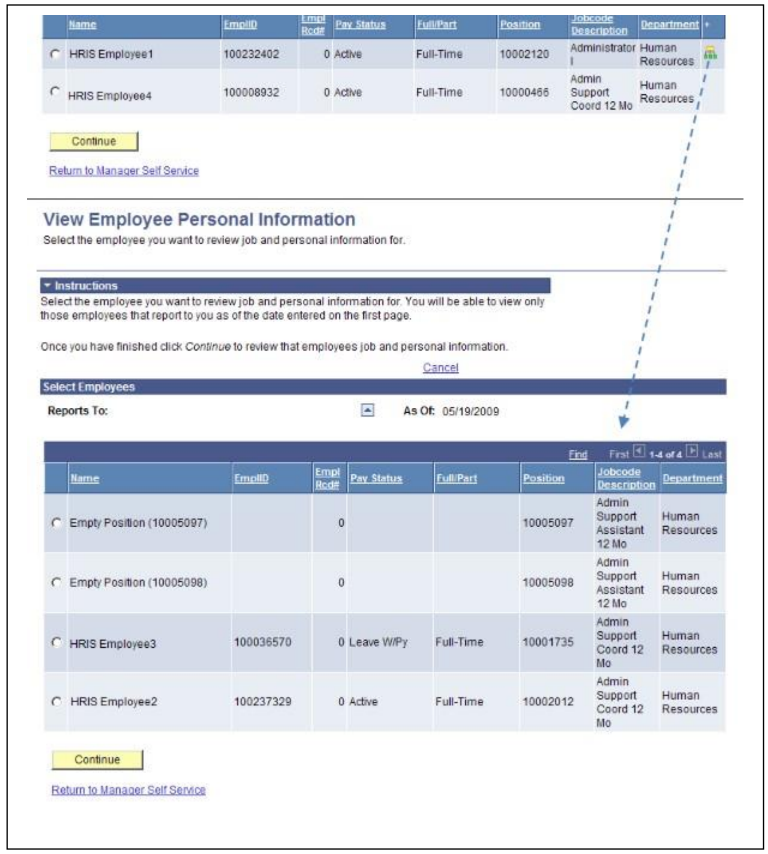
  **The side menu bar will display different links depending on the employee's PeopleSoft access.*



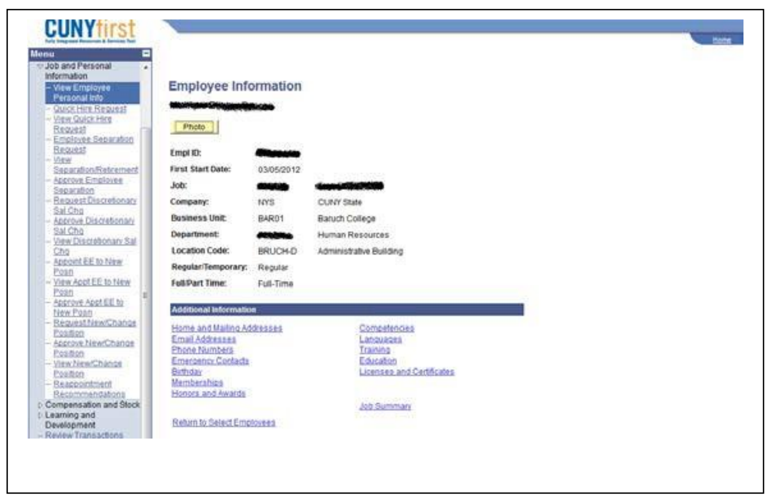
## 1. Job and Personal Information

| Processing Steps | Screen Shots |
|---|---|
| 1. Once signed into PeopleSoft, follow the navigation below:<br><br>Main Menu > Manager Self Service > Job and Personal Information > View Employee Personal Information<br><br>Click on Manager Self Service to view your employee's information. |  |
| 2. Upon entering the view Employee Personal Information page, the manager's direct reports search page with related instructions will appear.<br><br>• Enter the ***Effective Date***.<br>• The effective data entered on this page will determine who will display as your direct reports. Example: If you hire a person as of 03/02/2015 and you are using an effective date of 02/28/2015, the new hire will not show up even if he is in the system<br>• Click ***"Continue"*** Continue button. *The date will default to today's date and clicking continue will return current data.*<br>• Employees that directly report to you, display.<br>• To view additional information for an employee, select the button next to the employee's name and click **Continue** Continue button |  |

- To access employees that report to one of your reports, click .
- Those employees will display.
- To view additional information for an employee, select the button next to the employee's name and click **Continue** Continue button.




- The ***Employee Information*** page displays with general job information.
- Select any of the ***hyperlinks*** listed in the ***Additional Information*** section to view additional information about the employee.



## a) Quick Hire Request

<table>
<tr><th>Processing Steps</th><th>Screen Shot</th></tr>
<tr><td>

1. Once signed into PeopleSoft, follow the navigation below:

   Main Menu > Manager Self Service > Job and Personal Information > Quick Hire Request

   - Manager use ***Quick Hire Request*** page to submit new request to the open Position Number.
   - You must enter the required fields ***Effective Date*** and ***Position Number*** followed by other necessary information and finally click on **Submit** button to initiate the request.
   - Upon successful submit a new ***Request ID*** generated from ***NEW***.

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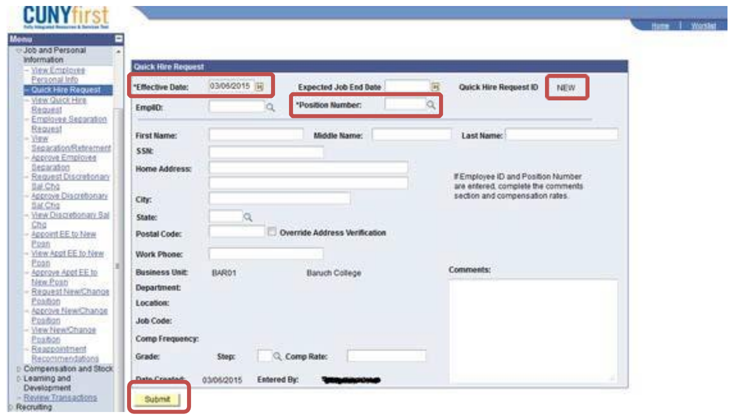


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*2.* Upon generating the **Request ID** using ***View Quick Hire Request*** you view the details.

Main Menu > Manager Self Service > Job and Personal Information > View Quick Hire Request

- Upon entering the Search Page Search by *Request ID or First Name or Last Name or Position Number* least provide one value to search and finally click Search button to list and select the necessary search to view the details.

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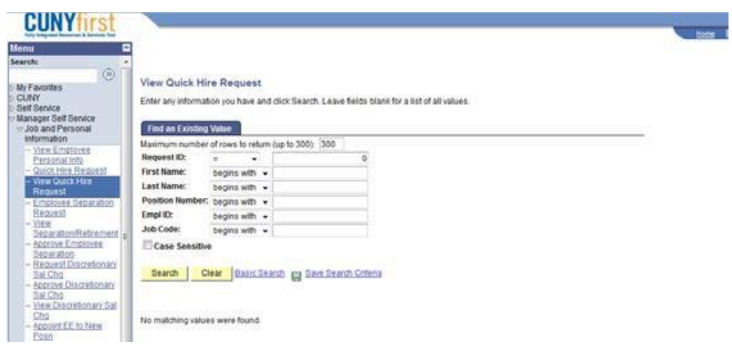


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## b) Request New/Change Position Status

| Processing Steps | Screen Shot |
|---|---|

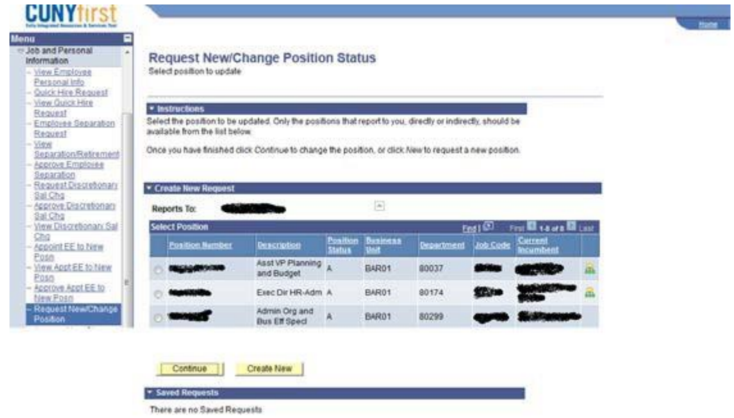
1. Once signed into PeopleSoft, follow the navigation below:

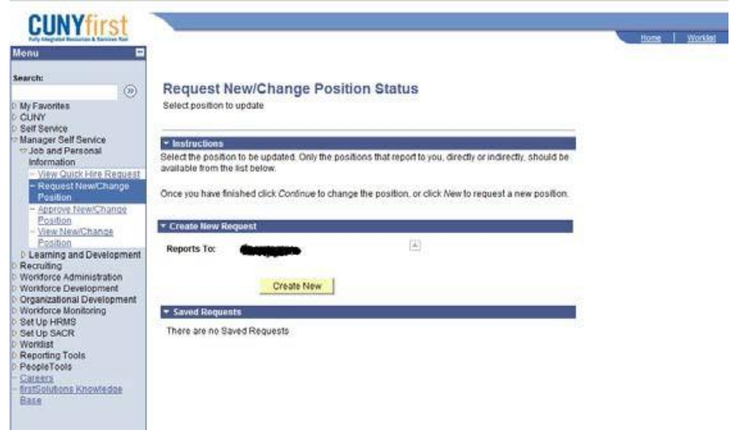
   Main Menu > Manager Self Service > Job and Personal Information > Request New/Change Position

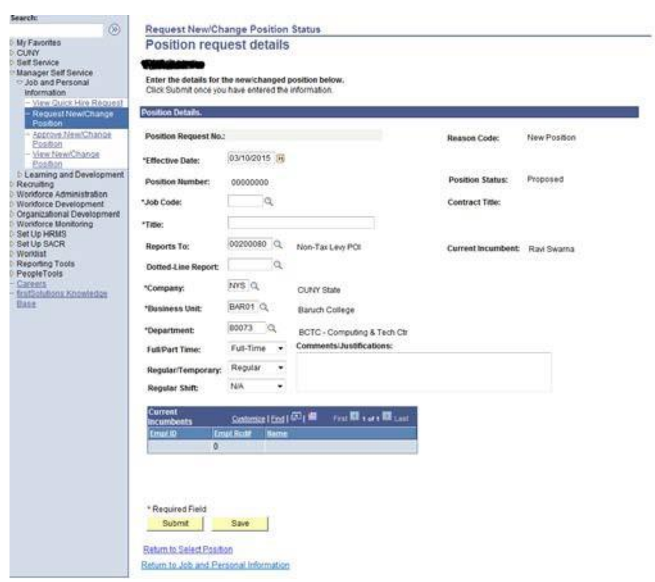
   - Upon entering page select the Position to be updated only that reports you, directly or indirectly, should be available from the list.
   - To access employees that report to one of your reports, click , those employees will display.
   - Select the button next to the **Position Number** and click **Continue** Continue button, to make changes.
   - To create new Position click on **Create New** Create New and enter the required details to Submit for new position.

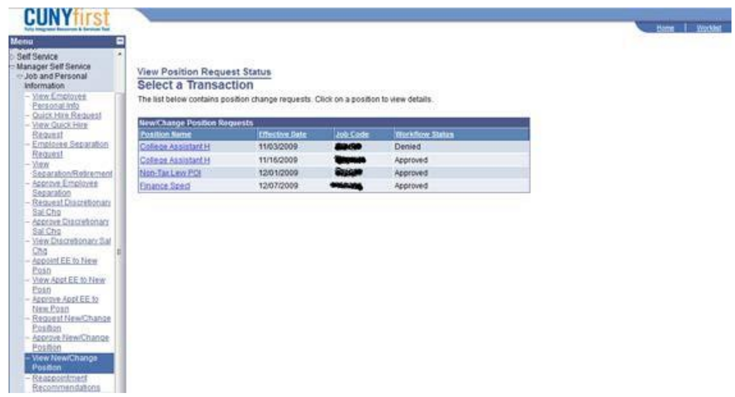
***Note:*** *Until you provide all the* **** Required Field*** *information then only allowed you to submit New/Change in Position Status.*

- Once ***Submit*** the New/Changes, there will be a workflow triggers to concern departments to approve/deny.
- Once approved this will be routed to ***Office of Human Resources recruitment*** and ***TAM*** and finally ***Workforce Administration – Job Data***.



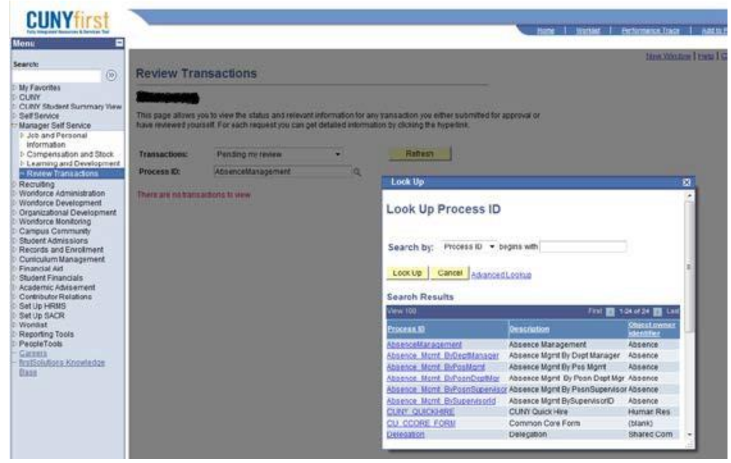



| | |
|---|---|
| 2. Upon each successful **Request of New/Change in Position** need an approval. To **Approve New/Change Position**, follow the navigation below.<br><br>Main Menu > Manager Self Service > Job and Personal Information > Approve New/Change Position |  |
| 3. Upon successful submission of each requests, where you can view the status using **view New/Change Position**, follow the navigation below:<br><br>Main Menu > Manager Self Service > Job and Personal Information > View New/Change Position<br><br>• To view the status click on **Position** name hyperlink view details. |  |

## Compensation History

| Processing Steps | Screen Shot |
|---|---|
| 1. Once signed into PeopleSoft, follow the navigation below:<br><br>Main Menu > Manager Self Service > Compensation and Stock > View Compensation History<br><br>• Upon entering page select an employee to display his compensation History by clicking on the Employee Name Hyperlink.<br><br>• To find a specific employee click on Search for Employee button Search for an employee and to drill down the direct reports of one of your employee click the org chart icon . |  |

## Review Transactions

| Processing Steps | Screen Shot |
|---|---|
| 1. Once signed into PeopleSoft, follow the navigation below:<br><br>Main Menu > Manager Self Service > Review Transactions<br><br>• Upon entering page select **Transactions** to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself by clicking the hyperlink.<br><br>• Select the desired **Transactions** option from the dropdown list<br><br>• Select **Process ID** and click the prompt button to search by Process ID and choose the desired one and click Refresh button Refresh and click the hyperlink to view the details. | <br> |

2. Once signed into PeopleSoft, follow the navigation below:

   Main Menu > Manager Self Service > Review Transactions

   - Upon entering page select **Transactions** to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself by clicking the hyperlink.

   - Select the desired **Transactions** option from the dropdown list

   - Select **Process ID** and click the prompt button to search by Process ID and choose the desired one and click Refresh button Refresh and click the hyperlink to view the details.