

# CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

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*Palm Beach County School District—HRIM Team*

## **Navigating to HR PeopleSoft**

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

3300 Forest Hill Blvd., Suite A-152

West Palm Beach, FL 33406

# Navigating to the HR PeopleSoft Pages

All Charter Employees must be entered into the Palm Beach County School District's HR PeopleSoft system to meet the Florida Department of Education reporting requirements.

To use the HR PeopleSoft system, you must have *HR ERP Access*. If you do not have this access, you must submit an eSupport request located in the eSupport Service Catalog under the Accounts and Access/PeopleSoft category. *(Please note: The IT Security Department limits the number of Charter employee ERP Access to four per school.)*

When entering information into PeopleSoft, please keep the following in mind: You must TAB or CLICK from field to field. Do not use the ENTER or RETURN key as the information will save at that point and you will be unable to finish filling out the information. Only enter information into the field referenced in the training guides. (The other fields are for District use, only.)

## **Logging into the PBCSD Portal**

You can get to the PBCSD Portal log in page by:

- Going to [www.mysdpbc.org](http://www.mysdpbc.org)

Once on the PBCSD Portal log in page, enter your District User ID and Password. If you do not have a District User ID\* and Password\*, you will need to call the IT Service Desk at 561-242-4100 (Option 2) to get them set up. *(\*Your job must have been entered into PeopleSoft at least four business days prior to calling the IT Service Desk.)*

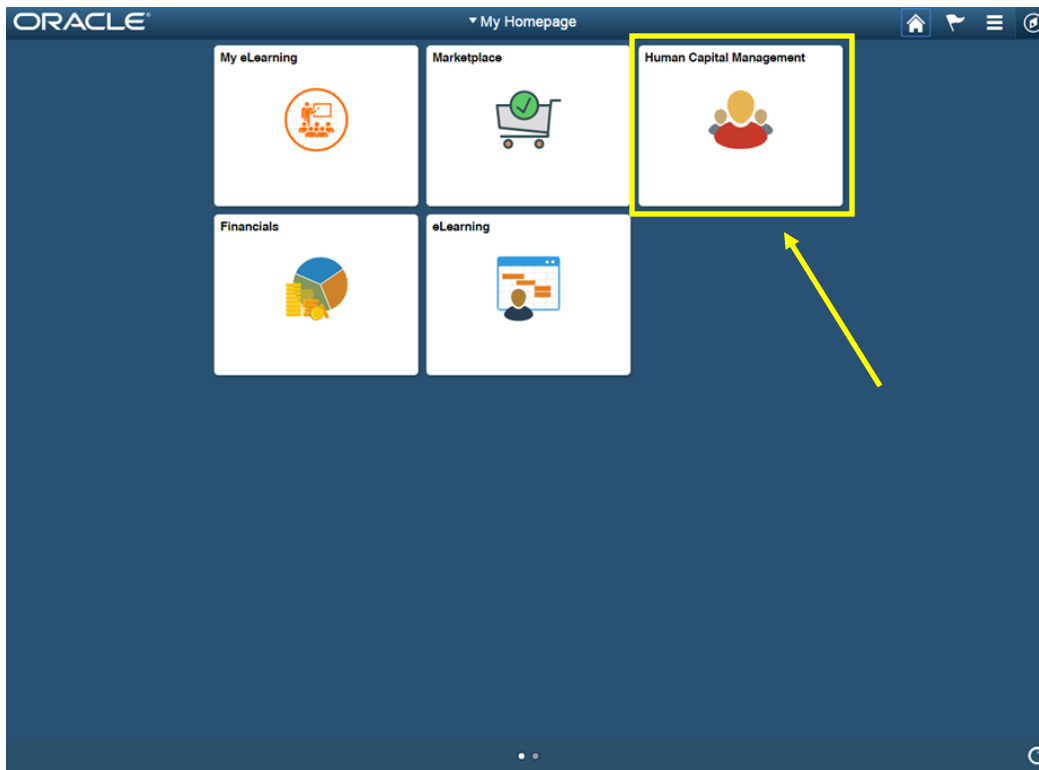
## **Charter Portal Page**

Once on your District Portal Page, click on the **PeopleSoft** tile.



## PeopleSoft Portal Page

Once on your PeopleSoft Portal page, click on the **Human Capital Management** tile.



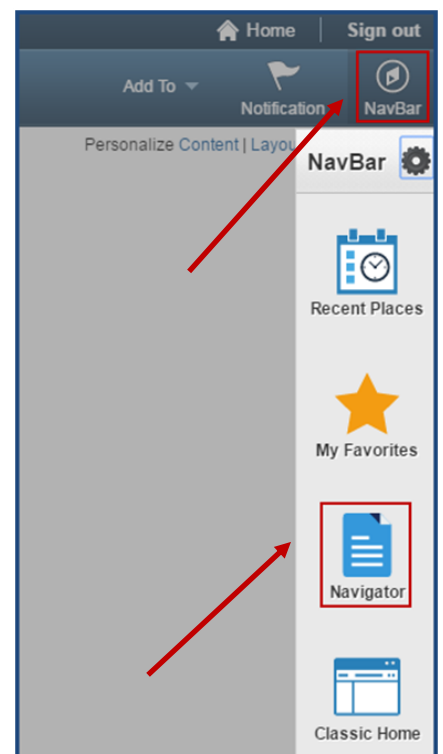
## Navigation Menu

In the next window, click on the *NavBar icon* to bring up the **NavBar menu**. (The *NavBar icon* is located in the upper right corner of the page.)

The following items will appear on the **NavBar menu**:

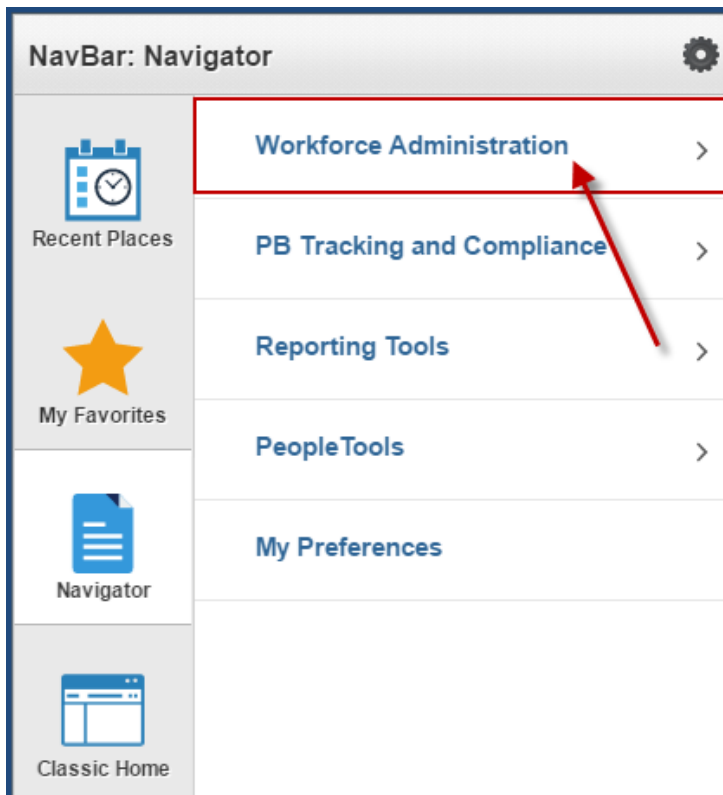
- **Recent Places** (Clicking on this will display the pages you have recently navigated to.)
- **My Favorites** (Any pages you have added to Favorites will be displayed here.)
- **Navigator** (Clicking on this will bring you to the basic Navigator menu and can be used to Navigate throughout the Human Capital Management pages.)
- **Classic Home** (Returns the display to the original navigation design. NOTE: This option will be removed at a future date.)

Click on the *Navigator icon* to bring up the **Navigator menu**.



## Navigation to the HR pages

Navigate through the PeopleSoft HR pages by using the menu choices.



# Resources

There are many Resources available for Charter Schools on the HR PeopleSoft for Charter Schools website. A link to this website is available on the main Charter website.

Resources available include:

## **PBCSD Charter Process Guides and videos**

- Certification Information page
- Charter School Onboarding Process
- Charter School Onboarding Process Flow Chart
- HR PeopleSoft End of Year Processing
- PBCSD IT Access Process

## **Training Resources**

- Navigating the HR PeopleSoft
- Entering New Employee Jobs
- Updating Employee Jobs
- Entering Rehire Jobs
- Terminating Jobs
- Updating Personal Information
- Running Queries
- FTE Charts
- FLDOE Survey Manuals/videos

## **Forms**

- Certification Pre-Clearance form
- Charter School Authorization form
- Charter School Personal Information form
- Charter School Job Information form
- Charter Schools Years of Experience form