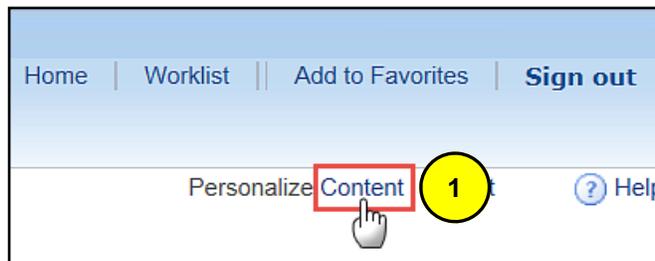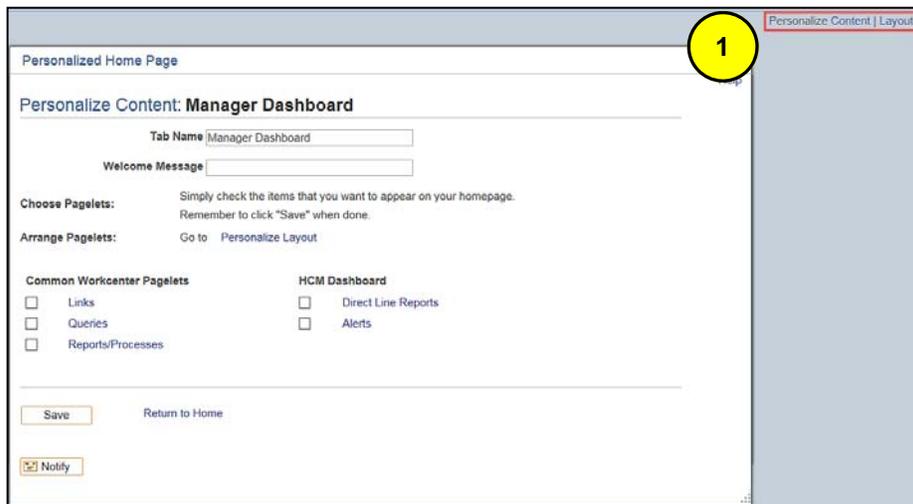# PeopleSoft HR Manager Dashboard

The HR Manager Dashboard will streamline and simplify management's use of PeopleSoft HR by allowing easy access to view their direct team's information, view alerts, run reports and queries, access commonly used PeopleSoft HR pages, and view manuals and job aids, all from one convenient page in PeopleSoft. The instructions below show how to first set up and personalize the HR Manager Dashboard (one-time only), and then how to use it.

Setting up Your Manager Dashboard

1. To set up the Manager Dashboard to appear on your PeopleSoft HCM Home page, click the **Content** link.
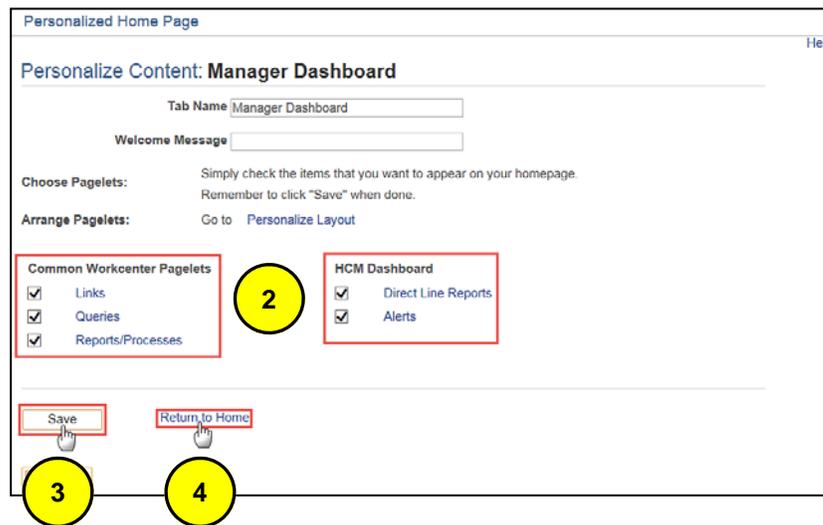

2. Select all the **Common Workcenter Pagelets** and the **HCM Dashboard** checkboxes.

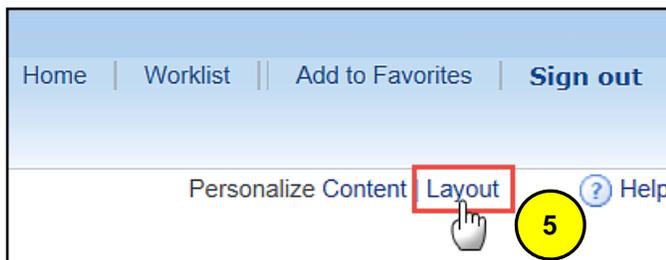3. Click [Save]. This will return you to the **Manager Dashboard** home page.

OR

4. Click **Return to Home** if you are viewing this screen and not making any changes.

Self Service

PeopleSoft HR Manager Dashboard

5. Click the **Layout** link at the top of the Manager Dashboard page.

| Home | Worklist | Add to Favorites | **Sign out** |

Personalize Content   Layout   (?) Help
5

6. Define layout by selecting either a 2 or 3 column layout style you wish to display on your Dashboard.

7. Identify the pagelets that should appear in each column. Move these pagelets from one column to the next by selecting the pagelet and clicking the left or right arrows.

Personalized Home Page

Help

Personalize Layout: **Manager Dashboard**

Tab Name   Manager Dashboard

Basic Layout: ○ 2 columns   ● 3 columns

6

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to   Personalize Content

\# = Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Alerts	Reports/Processes	Links
Queries		
Direct Line Reports		

7

Delete Pagelet

Save   Return to Home

8   **9**

8. Click [Save]. This will return you to the **Manager Dashboard** home page.

OR

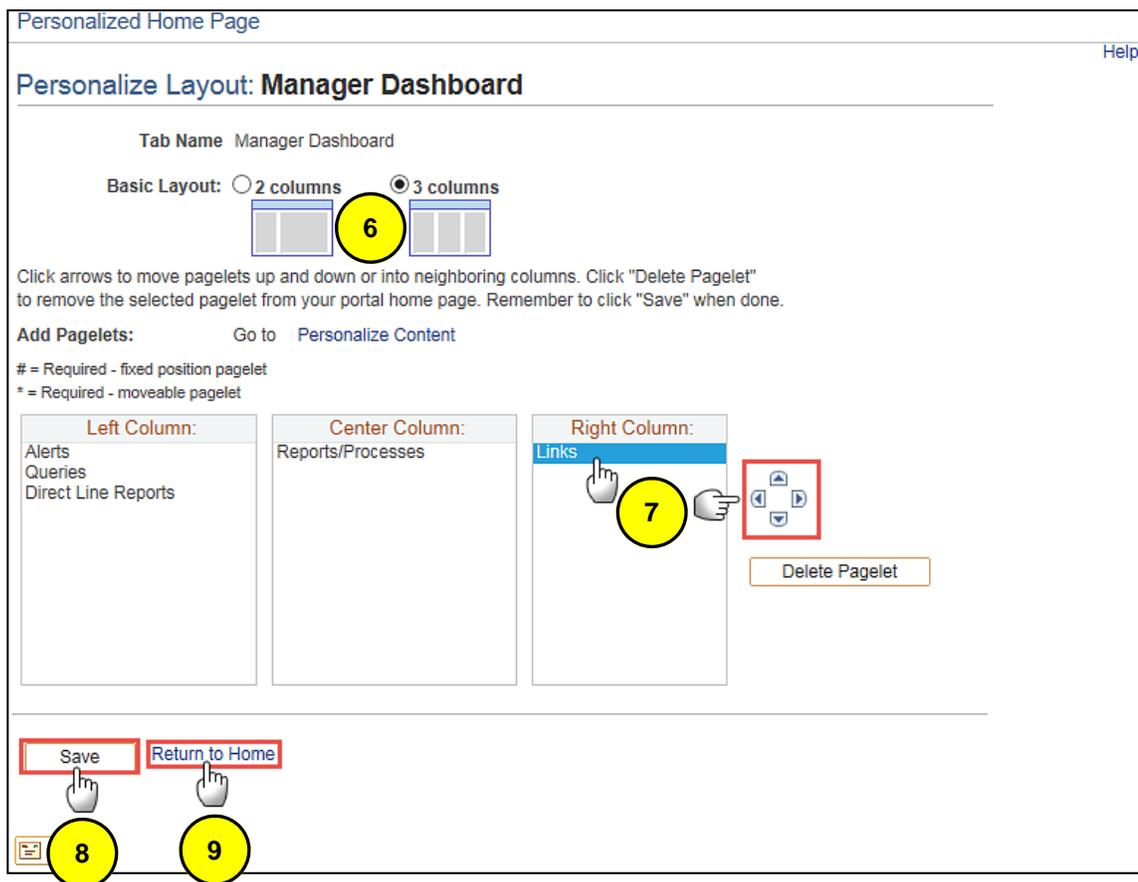9. Click **Return to Home** if you are viewing this screen and not making any changes.

NOTE: The purpose of the above steps is to define the content and layout of your HR Manager Dashboard. Steps 1 thru 9 need only be executed once, unless you later want to remove a pagelet or change the layout.

Self Service

PeopleSoft HR Manager Dashboard

Using the Manager Dashboard

1. The **Alerts** pagelet displays Birthday Alerts and Anniversary Alerts (based on employee Hire Date) for your direct reports.
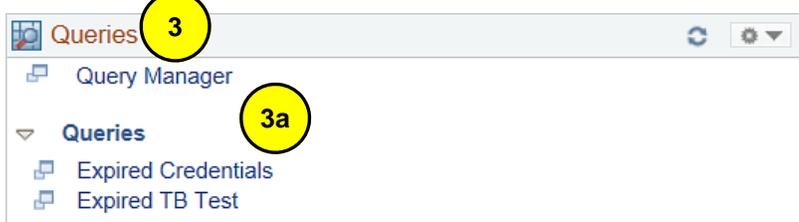
⚠ Alerts **(1)**   ↻ ⚙▼

  ❗ Jane Doe's 11 Years Anniversary is on 08/26

     Chris Doe's 21 Years Anniversary is on 09/01

View All

2. The **Reports/Processes** pagelet displays selected reports and processes on the Dashboard.
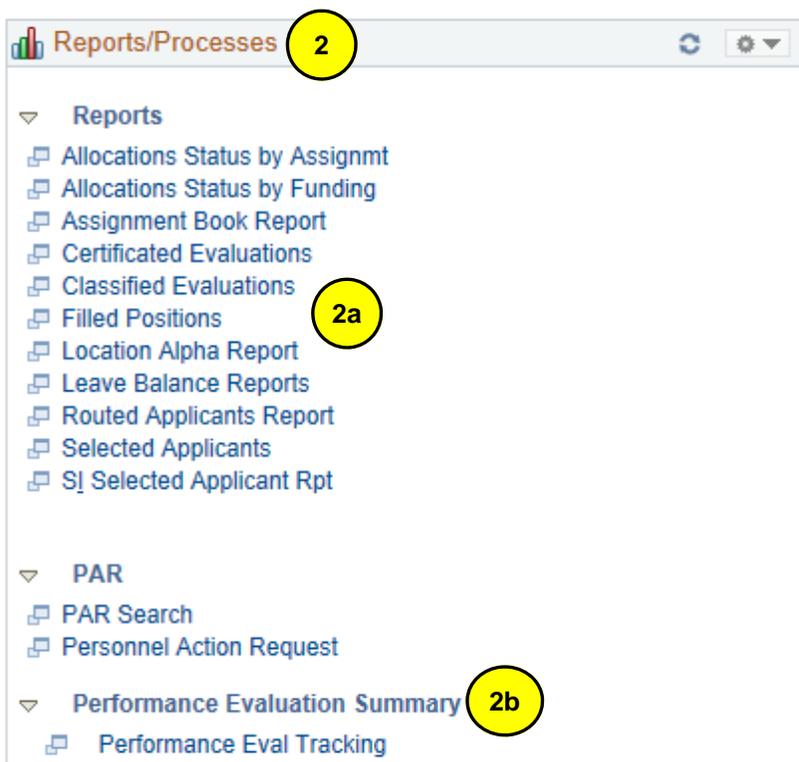
2a. Click the **Report** name to access the report run control page and execute the report. *Report will open in a new browser tab.* (Directions for running reports and processes are in the job aids on the **Links** pagelet)

2b. Click the **PeopleSoft Page** name to access the page. *Page will open in a new browser tab.*

📊 Reports/Processes **(2)**   ↻ ⚙▼

  ▽ **Reports**
    ⊞ Allocations Status by Assignmt
    ⊞ Allocations Status by Funding
    ⊞ Assignment Book Report
    ⊞ Certificated Evaluations
    ⊞ Classified Evaluations **(2a)**
    ⊞ Filled Positions
    ⊞ Location Alpha Report
    ⊞ Leave Balance Reports
    ⊞ Routed Applicants Report
    ⊞ Selected Applicants
    ⊞ SI Selected Applicant Rpt

  ▽ **PAR**
    ⊞ PAR Search
    ⊞ Personnel Action Request

  ▽ **Performance Evaluation Summary** **(2b)**
    ⊞ Performance Eval Tracking

3. The **Queries** pagelet displays selected queries on the Dashboard.

3a. Click the **Query** name to access the page to execute the query. *Query will open in the current browser tab, replacing the Dashboard.*

🔍 Queries **(3)**   ↻ ⚙▼
  ⊞ Query Manager
  ▽ **Queries** **(3a)**
    ⊞ Expired Credentials
    ⊞ Expired TB Test

3b. When finished view query results, Click the **Back Button** ← to Return to the **Manager Dashboard** home page.

(3b) ← pp11.sandi.net/psc/hcm92up3_4/EMPLOYEE/H ... | app11.sandi.net ×

...vorites Tools Help
SDUSD PeopleSoft Admin ...
SD_HR_EXP_CREDENTIALS - Expired Credentials
Unit: SDUSD
Dept ID: 0012
View Results

| ID	Name	Credential cd	Descr	Expire Dt

PeopleSoft HR Manager Dashboard

4. The **Links** pagelet displays frequently used **Manuals and Job Aids** at the District.

4a. Click the **Manuals and Job Aids** name to access the document. The document will open in a new browser tab.

5. The **Direct Line Reports** pagelet displays information about a manager's direct reports, including: job details, contact information, licenses and certifications, education and career history. Direct reports are determined by the "Reports To" position on the employee's Job Data record. "Direct reports" refers to employees for whom you are responsible for signing their timecards. If the direct reports shown in this pagelet are not correct (either missing employees who report to you or showing employees or vacant positions who do not report to you), you can correct it on the "Maintain Reports To Info" page in PeopleSoft. See the "**How to Maintain Reports to Information**" job aid for assistance.

5a. Click the **Summary tab** to view employee's name and job title.
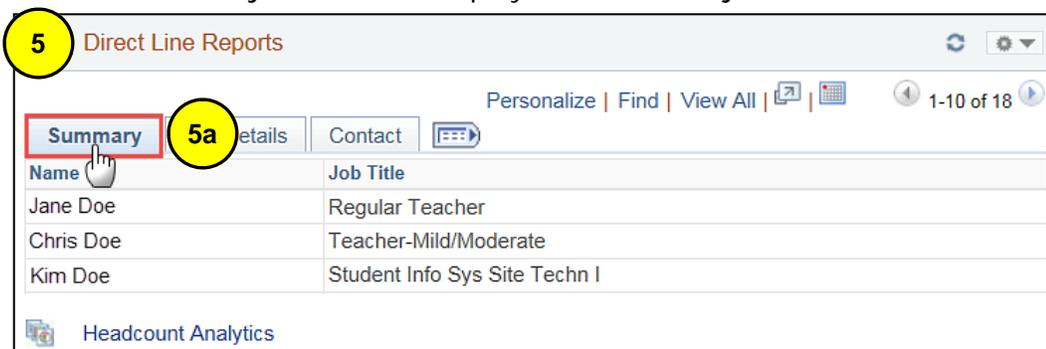
5b. Click the **Job Details tab** to view a high level overview of employee's job data.

5c. The last column of the **Job Details tab** displays a schedule icon, if applicable. This indicates where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies.

(holiday)	Indicates that the employee is on a holiday break today. hierarchical
(not scheduled)	Indicates that the employee is not scheduled to work today based on the employee's holiday schedule in Job Data.
(no show)	Indicates that the employee did not show up to work today when he or she is scheduled to work.

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5d. Click the **Contact tab** to view employee's contact information.

5e. Click the **Show all columns button** to view all columns on one screen.

5f. Click the **Show all columns button** to go back to the **Show Tabs** screen.

5g. Click the employee's name on any tab in the **Direct Line Reports** pagelet to access the **Talent Summary** page and view employee's job data, licenses and certifications, education and career history.

5h. Click the **Return to Manager Dashboard** link to return to the **Manager Dashboard** home page.