Using Browse Pages to Locate Personnel
Chapter 3: Using Browse Pages to Locate Personnel

Locating Personnel on the General Browse Page

The General Browse page is used to locate personnel records that you want to review or change. This page is available if you have department access or higher.

**Note:** If you have only project/grant access, you must use the Project Browse page to locate personnel records that you want to review or change for your projects. See “Locating Personnel on the Project Browse Page,” on page 143 for more information on the Project Browse page.

The General Browse page consists of two parts:

- The Search Criteria panel, where you enter the criteria used to select the personnel that will be displayed in the personnel list.
- The personnel list, which shows all personnel that match the search criteria you entered (your current view), and includes the buttons at the far right that you will use to display either the Summary page for editing, or the Summary Report for viewing without making changes.

Using the search criteria, you can narrow the current view down to a single person, or you can expand it to include people from multiple departments and staff classes if you are so authorized.

At the bottom of the General Browse page are the following buttons:

- The Add Vacancy button you can click to add a commitment for a vacant position, reserving the funds for an eventual hire.
- The Add Template button you can click to add a template for standard or commonly used distributions in your department.
- The Project Browse button you can click to display the Project Browse page, where you can display a project summary for any project for which you are authorized.
- The Log Out button you can use to log out of Labor Accounting.
Each time you start Labor Accounting, the General Browse page is displayed with a blank personnel list, unless you have selected the worklist option in your user profile (see “Changing Your User Profile,” on page 21 for more information). To list the personnel you want to review or edit, you will need to enter the criteria that define which records you are interested in (your current view).

When you have created your current view, you can select the people for whom you need to make changes or review distributions from the personnel list on the General Browse page. When you edit a record, the record is locked to anyone else until you close the record, either by quitting the edit or by submitting the changes for approval.

When you finish reviewing the selected person’s records, you may return to the General Browse page to select the next person. To return to the General Browse page, click one of the following buttons at the bottom of the Summary page:

- **Quit Edit** to return without saving or submitting any changes you may have made. If you have made changes, they will not be saved.

- **Save** to save your changes without submitting them for approval. The record remains locked to other users, and the changes are held for 24 hours. If you have not returned to the record to update or submit your changes, after 24 hours the record is unlocked, and any other authorized person can make changes to the record.

  After 24 hours have passed, if you return to the record and no one else has opened or changed the record, your changes will still be there. However, if someone else has opened and edited the record, your changes may be lost.

- **Submit** to save your changes, approve changes for all of your authorized approval levels, and submit them for any other required approvals.

- **Partial** to approve changes at your highest authorized approval level only. For example, if you have departmental and project approval authorization, partial approval approves changes at the department level only.

- **Disappr** to disapprove changes.
**Entering Search Criteria to Create the Current View**

You can select the parameters to create a current view at the beginning of your Labor Accounting session, and you can change these parameters at any time during the session. All search criteria you select will be used together to determine which records will be listed in the current view.

If you have changed one or more search criteria and then, before clicking the Search button, you decide you want to return to the previously used criteria rather than using the changed criteria, click the Reset button. To return all the search criteria to the default settings, click the Clear button.

To display a help topic that introduces or explains the displayed page, click the Help button. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help navigation pane, which you can use to locate more information.

**To create a current view:**

1. On the General Browse page, select the Fiscal Year or Date Range for which you want to list people:
   
   - To select one or more years, click on the checkbox before (to the left of) each year you want to include. Only individuals who are active in Labor Accounting (have distributions) during the selected year(s) will be displayed on the General Browse page.

     **Tip!** Fiscal years are known by the ending year, so the 05-06 year would be known as fiscal year 2006.

   - To select a date range, enter the beginning date in the From field and the ending date in the To field, in M/D/YYYY format (where M is the one or two digit month number, D is the one or two digit day of the month, and YYYY is the four digit year).

     **Tip!** You can double click in the From and To fields to display a calendar where you can select the desired date. See “Using the Calendar Window,” on page 171 if you need help using the calendar.
Only individuals who have distributions during the selected period will be displayed on the General Browse page.

**Note:** The Summary page will include data for all fiscal years stored in the Labor Accounting database for the individual.

2. To limit your selections to a single pending status, select the desired status from the drop-down list in the *Pending Status* field. The code before the status description is the same code that is displayed in the *Pend Code* column on the personnel list.

**Note:** If you do not have authority for a person, they will not show up in the General Browse page, even if the criteria you enter are otherwise correct. Use the Project Browse page to locate a person who is not in your authorized department(s).

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P - Basic Approval</td>
<td>Only records with changes that have been waiting for department or project approval will be displayed.</td>
</tr>
<tr>
<td>C - CO Approval</td>
<td>Only records with commitment changes that have been authorized by a department and/or project, but have not yet been approved by the appropriate central office (Graduate School for graduate students, Office of the Dean of the Faculty for faculty, HR or PPL for staff) will be displayed.</td>
</tr>
<tr>
<td>All Approvals</td>
<td>All records that are pending any type of approval for which you are authorized will be displayed. This option displays your worklist.</td>
</tr>
<tr>
<td>U - Approval (others)</td>
<td>All records that are not waiting for your approval, but are still waiting for approval by other people will be displayed.</td>
</tr>
<tr>
<td>UC - CO Approval (oth)</td>
<td>All records that have been approved at the department and project level, but are still waiting for approval by the central office will be displayed.</td>
</tr>
<tr>
<td>UX - Disapprove (oth)</td>
<td>Only records that have changes that have been disapproved and must be corrected before someone else can approve them will be displayed.</td>
</tr>
</tbody>
</table>
3. To select records by name or ID, enter values in the Name & Emplid area:

- To limit your view to one or more people whose names begin with the same letters, enter as much of the last name as you know in the Last field, and as much of the first name as you know in the First field.
- To limit your view to a single person, enter the person’s Employee ID (their PeopleSoft EmplID) in the ID field.

4. To select records for only one department, enter the three-digit department code in the Dept. field. To select records from a group of departments, select a division from the drop-down list in the Div field.

**Note:** If you only have access to one department, you can leave the Dept field blank. All records in your department that meet any other criteria you have selected will be displayed.

5. To limit your current view to a particular staff class, select the staff class you want to include from the drop-down list in the Class field. The following staff classes may be listed:

- **ADMIN** Administrative and monthly pay period staff
- **BW-A** Biweekly-A staff (service and maintenance, and technical support)
- **BW-B** Biweekly-B staff (administrative)
- **CAS** Casual hourly employees
- **FAC** Regular and visiting faculty members
- **GS** Graduate students
- **LIBR** Professional Librarians
- **MISC** Any employee not in one of the other classes

_X - Disapproved_ Only records that have changes that have been disapproved will be displayed.

_- Approved_ Only records with distributions and commitments that are fully authorized and are currently in effect will be displayed._
To further restrict the staff class, select a category from the drop-down list in the Code field.

**Tip!** The Code field includes both the staff code and the description. Be sure that you are selecting the correct combination. For example, Administrative appears on the list twice, once with the AM code and once with the MR code.

6. To limit your current view to a specific commitment code, such as **002 Summer Salary**, **103 Academic Year AI Salary**, or **041 Temporary Disability**, select the code from the drop-down list in the Commitment Code field.

7. To limit your current view to one or more project/grants, you may select by project/grant, by department, by primary investigator, or by fund. You can also limit your selections to only sponsored projects.

   - To include a range of project/grants, enter the first project/grant number in the Begin field and the last project/grant number in the End field. You may enter all or part of the project/grant number in either field.
   - To limit your view to a single project/grant, enter the complete 7-digit project/grant number in the Begin field.
   - To include all project/grants in a particular department, enter the 3-digit department code in the Dept field.
   - To limit your view to sponsored projects within the specified (or default) department only, click the Sponsored Project checkbox.
   - To limit your view to projects lead by a specific primary investigator, select the investigator from the drop-down list in the P.I. field.
   - To include all project/grants under a particular fund in the specified or default department, select the fund from the drop-down list in the Fund field.
8. To limit your current view to special groups of records within the other criteria you have entered, select the desired group from the Special field.

<table>
<thead>
<tr>
<th>Clear Offset</th>
<th>Displays only records with offset distributions. These must be resolved before changes can be approved.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed P/G</td>
<td>Displays only records with commitments for a project/grant after the close date of the project.</td>
</tr>
<tr>
<td>Closed P/G - Book</td>
<td>Displays records with future commitments in projects which have already closed.</td>
</tr>
<tr>
<td>My Worklist</td>
<td>Displays only your worklist. (Alternatively, select All Approvals from the Pending Status drop-down list.)</td>
</tr>
</tbody>
</table>

**Important!** Your worklist will not include people who are not in your department. If you must approve project distributions for such people, you must locate them using the Project Browse page.

**Note:** If you have department authorization, your worklist includes records with a Pending Status of P or X. If you have central office authorization, your worklist includes records with a Pending Status of C.

<table>
<thead>
<tr>
<th>New Contract - Day</th>
<th>Displays only graduate students whose contracts have been updated in PeopleSoft within the last day.</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Contract - Week</td>
<td>Displays only graduate students whose contracts have been updated in PeopleSoft within the last week.</td>
</tr>
<tr>
<td>New Contract - Since Last Change</td>
<td>Displays only graduate students whose contracts have been updated in PeopleSoft more recently than their records in Labor Accounting.</td>
</tr>
<tr>
<td>No I9</td>
<td>Displays only graduate students with commitments who do not have an I-9 on file.</td>
</tr>
<tr>
<td>No I9 Current Commit</td>
<td>Displays only graduate students with commitments beginning within one month who do not have an I-9 on file.</td>
</tr>
</tbody>
</table>
9. When all selections are complete, click the **Search** button or press the **Enter** key. The General Browse page reappears, listing the people you have selected.

10. To view or change distributions, click the **Edit Summary** button on the row for the person whose distributions you want to change.

**What's on the Personnel List?**

The Personnel list on the General Browse page provides a quick summary of each person’s status. The list is initially displayed in order by department and name; however, you can sort the list based on any of the fields by clicking on the column header for the field you want to sort by. The records will be sorted in ascending order.

The personnel list includes the following information about each personnel record that matches your search criteria:

- **Emplid**: The person’s employee ID from their PeopleSoft record.
- **Job#**: 50 or 51 for graduate students and 0, 1, 2, and so on for faculty and staff members. The 0 record is usually the person’s primary job.
- **Name**: The person’s name, last name first.
- **Staff Class**: A code indicating the person’s staff classification.
- **Enr**: For graduate students, the enrollment status code.
- **Home Department**: The 3-digit code and name of the person’s home department.
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TB/AI
A flag, indicating whether the faculty or staff member is charged to the Teaching Budget (TB), or the graduate student is supported as an AI.

Distrib Code
Shows a Y if there are non-default distributions for the person.

Pend Code
Shows the pending code if changes have been entered. Generally a P, C, or U indicates that changes are pending, and an X indicates that changes have been disapproved. You can see an abbreviated description of each code by clicking the drop-down arrow on the Pending Status field in the Search Criteria panel; each pending status code is displayed with a description. For further information, see “Pending Status: What Does it Mean to You?,” on page 35.

Last Updated
Shows the most recent date when the record was updated.

At the end of each row, there are two button icons:

- **Edit Summary**
  Click to display the Summary page for the person, where you can edit the distributions as needed.

- **View Summary Report**
  Click to display a Summary Report for the person. You cannot enter changes on the Summary Report.

The Personnel List shows records by person and Job#. If a person has changed departments, or is assigned part-time to two different departments, the person’s record will appear for both departments. However, you will only be able to make changes within the periods and distributions charged to department(s) for which you are authorized.

If a person has changed from one staff class to another and the Job# changes, such as when a graduate student becomes an employee, the person will appear twice on the General Browse page, because they have an additional Job#. If a person changes from one staff class to another and the Job# does not change, they will appear only once on the Personnel List, with a Staff Class of Mult. If you have limited staff access, you may only modify data in the staff class for which you are authorized.
**Pending Status: What Does it Mean to You?**

The pending statuses you are likely to see on the General Browse page depend on your approval authorization level.

<table>
<thead>
<tr>
<th>Pend Code</th>
<th>If you have departmental authorization</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>You can approve changes. Records with this status will show up in your worklist.</td>
</tr>
<tr>
<td>C</td>
<td>You won’t see this.</td>
</tr>
<tr>
<td>U</td>
<td>Someone else needs to approve changes.</td>
</tr>
<tr>
<td>UC</td>
<td>The central office needs to approve changes.</td>
</tr>
<tr>
<td>UX</td>
<td>The record must be corrected, and then someone else needs to approve the changes.</td>
</tr>
<tr>
<td>X</td>
<td>You can correct and approve disapproved changes. Records with this status will show up in your worklist.</td>
</tr>
<tr>
<td></td>
<td>No approvals are pending for this record.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pend Code</th>
<th>If you have central office authorization</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>You won’t see this, unless you also have departmental authorization.</td>
</tr>
<tr>
<td>C</td>
<td>You can approve changes. Records with this status will show up in your worklist.</td>
</tr>
<tr>
<td>U</td>
<td>Someone else needs to approve changes.</td>
</tr>
<tr>
<td>UC</td>
<td>Someone else in your office needs to approve changes.</td>
</tr>
<tr>
<td>UX</td>
<td>The record must be corrected, and then someone else needs to approve the changes.</td>
</tr>
<tr>
<td>X</td>
<td>You are not likely to see this, as most disapproved changes will show up as UX for you.</td>
</tr>
<tr>
<td></td>
<td>No approvals are pending for this record.</td>
</tr>
</tbody>
</table>