# Getting Started in the SMT

In this section, you will log in to PeopleSoft HRMS and navigate to the SMT for your department and location. You will view the Staffing Summary, Limited Term Staffing Summary, Funding Summary, and Allocations & Balances pages.

You will use your District username and password to log in to PeopleSoft HRMS.
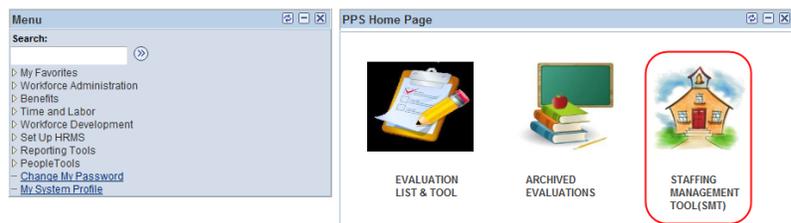
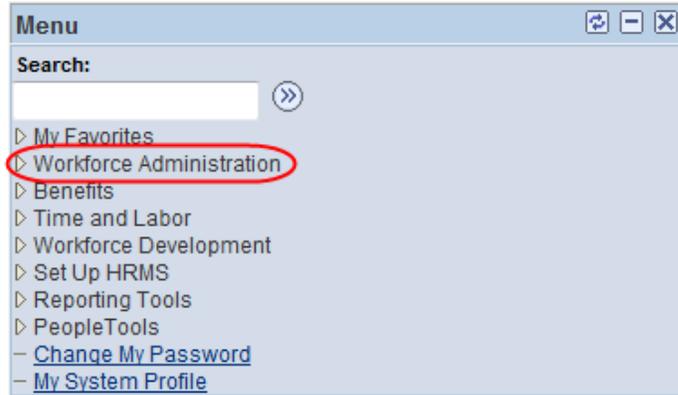|	
Step 1: **Click on the link to PeopleSoft HRMS on PPS Inside** or enter the URL into your internet browser. Step 2: **Enter your username and password** Step 3: **Click on Sign In**	**ORACLE®** **PEOPLESOFT ENTERPRISE** User ID: Password: Sign In Forgot your password? Set Trace Flags
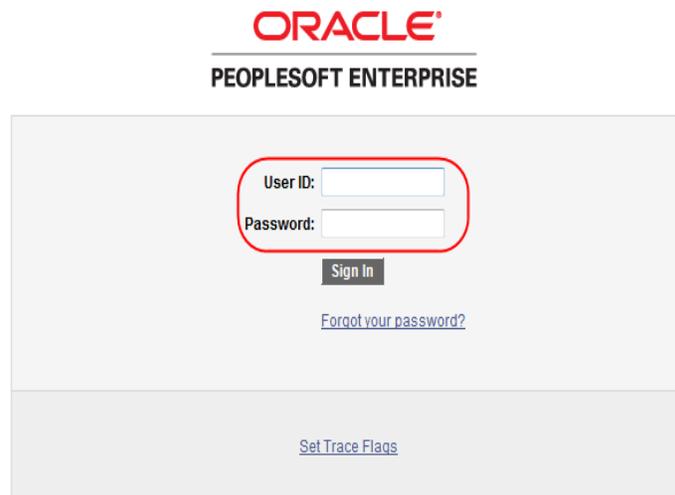
Step 4: **Click on the SMT icon**, then proceed to Step 7. If you do not have icons displayed, follow steps 5 & 6.	Menu Search: ▷ My Favorites ▷ Workforce Administration ▷ Benefits ▷ Time and Labor ▷ Workforce Development ▷ Set Up HRMS ▷ Reporting Tools ▷ PeopleTools – Change My Password – My System Profile PPS Home Page EVALUATION LIST & TOOL ARCHIVED EVALUATIONS STAFFING MANAGEMENT TOOL(SMT)

Step 5: **Click the Workforce Administration link** on the left side of the page.

Menu

Search:

▷ My Favorites
▷ Workforce Administration
▷ Benefits
▷ Time and Labor
▷ Workforce Development
▷ Set Up HRMS
▷ Reporting Tools
▷ PeopleTools
– Change My Password
– My System Profile

Step 6: **Click on one of the links to the PPS SMT.**

You can click on the link in the left column or on the icon in the center of the page.

Menu

Search:

▷ My Favorites
▽ Workforce Administration
  ▷ Personal Information
  ▷ Job Information
  ▷ Workforce Reports
  – PPS SMT
  – PPS SMT Detail Report
  – PPS SMT Position Detail Roster
  – PPS SMT Staff Roster
▷ Benefits

OR

Workforce Administration

Workforce Administration

Hire employees, add non-employees, maintain personal and job data, administer global assignments, labor relations, absence and vacation.

PPS SMT
PPS SMT

PPS SMT Detail Report
PPS Staffing Management Tool Detail Report

PPS SMT Staff Roster
PPS SMT Staff Roster

Personal Information
Maintain information about a person regardless of Jobs.
Modify a Person
Biographical
Personal Relationships

Workforce Reports
General Workforce Reporting
PPS Generate Mailing Labels
PPS Seniority List Report
PPS EBVL for Funds
5 More...

Step 7: **Enter Fiscal Year, your Department ID and Location ID**.

Hint for selecting Fiscal Year: Choose the year that the school year ends in. Example: for the 2013-2014 school year, select 2014 as your Fiscal Year.

You **MUST enter BOTH Department ID and Location ID** to be able to *make changes* to your SMT. You can *view* an SMT by Department or Location alone.

You can use the Magnifying Glass to look up your Department ID or Location ID if necessary.

Step 8: **Click Search**.

PPS SMT

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Fiscal Year:	= ▼		2014
Business Unit:	begins with ▼	PPS1J	
Department:	begins with ▼	6987	🔍
Location Code:	begins with ▼	110	🔍

☐ Include History

Search   Clear   Basic Search   📇 Save Search Criteria

NOTE: There are four main tabs for the SMT.

Step 9: **View the Staffing Summary tab.**

The **Staffing Summary tab** displays a complete list of regular staff and vacancies in two sections: Filled Positions and Vacant Positions.

NOTE: Your General Fund and Title I balances are listed at the top of the page. You will not be able to Submit your SMT until you have balanced your FTE.

| Staffing Summary | Limited Term Staffing Summary | Funding Summary | Allocations & Balances |

Department	6987	Imagination	Fiscal Year	2014
Location	110	Imagination K-8	General Fund Balance	0.500
			Title I Balance	0.090
Status	Open		Title IC Balance	0.000

▼ Filled Positions   Personalize | Find | View All | 🔲 | 🔢   First ◄ 1-15 of 30 ► Last

	View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date
1	▲	Angelou,Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014
2	▲	Baez,Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013
3	△	Banderas,Antonio	Teacher-K8 Gr 4 Spanish Imm	1.000	Active	07/01/2013

Step 10: **Click the Limited Term Staffing Summary tab.**

The **Limited Term Staffing Summary** displays a complete list of limited term staff and vacancies in two sections: Filled Positions and Vacant Positions.

NOTE: FTE balances are not affected by Limited Term positions, as they carry no FTE attached to them.

Step 11: **Click the Funding Summary tab.**

The **Funding Summary** page displays FTE and funding information for all employees and vacant positions by funding types (General Fund, Title I, Foundation, Kindergarten Fee for Service, etc.).

Step 12: **Click the Allocations & Balances tab.**

The **Allocations & Balances** page contains all of the allocations and balances for all funding groups, counting both used and vacant FTE.

It will display the results of staffing changes you have made on previous pages, and will indicate the status of your SMT: "Open" or "Submitted".

| Staffing Summary | Limited Term Staffing Summary | Funding Summary | Allocations & Balances |

Department	6987	Imagination		Fiscal Year	2014	By	Approve & Submit
Location	110	Imagination K-8		General Fund Balance	0.500	Date 07/09/13 12:54:53PM	Open/Edit
Status	Open					SMT Manager & User Information	Recalc Balances

General Fund Total   Personalize | Find | View All | First 1-5 of 5 Last

	Funding Group	Dept	Location	Allocation Type	Allocated Equiv	Used Equiv	Balance Equiv	Actual Position FTE
1	Gen Fund Licensed	1232	232	FTE	21.330	21.790	-0.460	21.790
2	Gen Fund Classified Repr .5 wt	1232	232	FTE	1.250	0.785	0.465	1.571
3	Gen Fund Admin-Licensed	1232	232	FTE	2.000	2.000	0.000	2.000
4	Gen Fund Kindergarten	1232	232	FTE	1.500	1.500	0.000	1.500
5	Gen Fund Classif Kinder .5 wt	1232	232	FTE		0.004	-0.004	0.009

General Fund FTE	26.080	26.079	0.001	26.870
Total Gen Fund FTE with Arts	26.580	26.579	0.001	27.370

| **This section is complete!** | You have now logged into PeopleSoft HRMS, navigated to the SMT, and viewed the Staffing Summary, Limited Term Staffing Summary, Funding Summary and Allocations & Balances for your department and location. |