Uploading Certificates/Licences to PeopleSoft

It is a requirement that persons engaged with Endeavour Foundation for work must hold all applicable certificates and/or licences relevant to their job role and/or responsibilities.

In addition, staff must ensure a current copy of their certificate/licence is uploaded to, and maintained within, the Talent Profile section of PeopleSoft for reporting and compliance purposes. Once uploaded, your line manager will review the details that have been submitted, and once approved, your certificate/licence will display on your Talent Profile.

IMPORTANT: all training related records e.g. First Aid and/or CPR are recorded in Engage. Please send your training completion records to learning@endeavour.com.au for processing.
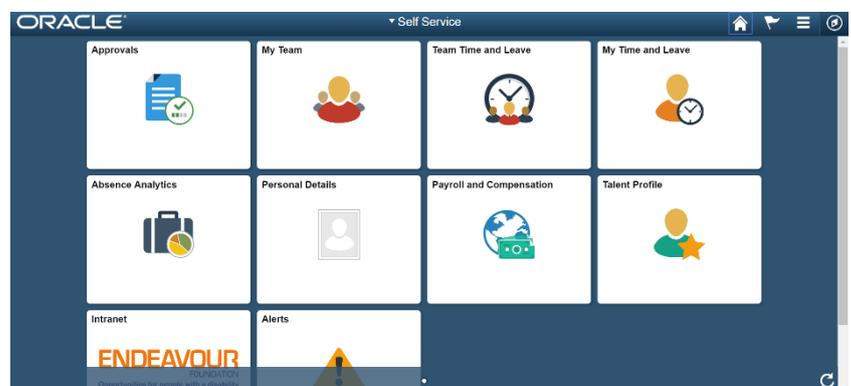
How to access PeopleSoft

To access PeopleSoft, go to https://efhris.com.au and login using the username (for example SmithJ) and password you normally use to login to your Endeavour Foundation network account each morning. You will see the home screen below as shown on a mobile device.

Please note: PeopleSoft is locked whilst pays are running Tuesday COB – Wednesday COB each week. You will be unable to upload certificates/licences during the outage window.
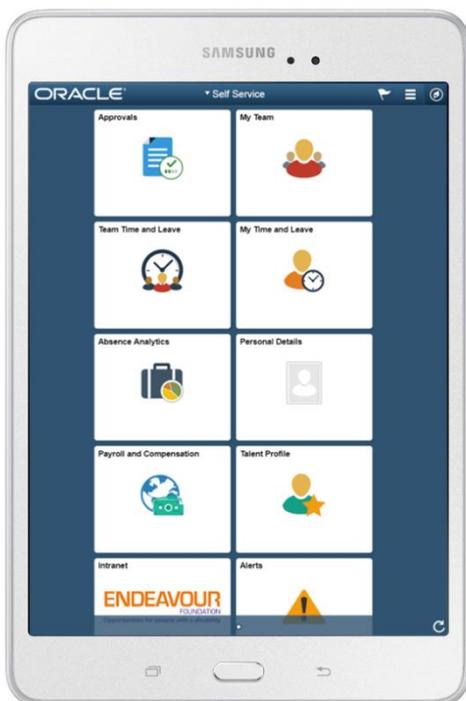
IMPORTANT:

We recommend utilising
Google Chrome to complete this process.
Some versions of Internet Explorer are incompatible with the uploading of PDF documents.

Scenario Shortcuts

Please utilise the scenarios below to ascertain the correct process to follow to ensure your PeopleSoft Talent Profile is updated successfully

Scenario 1: I already have this certificate/licence recorded in PeopleSoft but it needs updating

Solution: See Page 3 - **Updating your current certificate/licence in PeopleSoft**

Scenario 2: My certificate/licence is not yet recorded in PeopleSoft and I need to add it

Solution: See Page 5 - **Adding a new certificate/licence type to your PeopleSoft Talent Profile**

Scenario 4: I am a manager and received notification to review my staff's certificate/licence in PeopleSoft, how do I do this?

Solution: See Page 8 – **Manager Dashboard – Certificate/Licence Approval Workflow**

Scenario 5: I am a manager; can I upload or edit certificates/licences that are on my staff's Talent Profile?

Solution: Yes. See Page 11 – **Updating your staff's certificates/licences**

Scenario 6: I am having issues, help!

Solution: See Page 14 - **Troubleshooting**

Need help?

Contact Learning:

✉ peopleexperience@endeavour.com.au

Please include a description and screen shot of any errors you may be encountering so we can assist you

Updating your current certificate/licence to your Talent Profile

What's your browser?
Please ensure you are using Google Chrome browser to complete this process.

1. From the Employee Self Service page, click **Talent Profile.**

2. Click '**Edit/View'** to open the current applicable entry

3. Enter your new certificate/licence completion information. The following data fields are mandatory

- **Issue Date:** enter the date you completed your certificate/licence here
- **Licence Type:** click on the [🔍] icon and select the applicable certificate/licence
- **State:** click on the [🔍] icon and select the applicable state
- **Renewal Required:** toggle the lever to 'Yes' if your certificate/licence has an expiry date
- **Application underway/complete:** Click the click on the [🔍] icon and select Complete

- **Expiry Date:** If applicable, enter the expiry date

IMPORTANT:

It is critical that the information entered here aligns **exactly** with the information on your certificate/licence.

4. Click **Add Attachment** and upload your new certificate/licence

▾ Attachments

No attachments have been uploaded for this profile item.

Add Attachment

5. The entry will now display with an **'Update'** Status, click **Submit** to continue

Cancel	**Request Approval**		Submit

Licenses and Certifications

License Type	Status
Drivers Licence	Update

6. Click **Submit for Approval**

Licenses and Certifications   Submit for Approval

\+

License Type	Status	Edit/View
Drivers Lcence	Update	>

NEXT STEPS?

Your line manager will now be alerted that a certificate/licence requires approval. The status will remain as **Pending Approval**, and you will also continue to receive alerts, until the approval process has been completed.

Please note: Blue and Yellow cards must also be reviewed by a People Experience representative as part of the approval process.

Adding a new certificate/licence type to your PeopleSoft Talent Profile

What's your browser?
Please ensure you are using Google Chrome browser to complete this process.

1. From the Employee Self Service page, click **Talent Profile.**

2. Click the '**+**' symbol to add a new certification

3. The following data fields are <u>mandatory</u>

a. **Issue Date:** enter the date you completed your certificate/licence here
b. **Licence Type:** click on the 🔍 icon and select the applicable certificate/licence
c. **State:** click on the 🔍 icon and select the applicable state
d. **Renewal Required:** toggle the lever to 'Yes' if your certificate/licence has an expiry date
e. **Application underway/complete:** Click the click on the 🔍 icon and select Complete
f. **Expiry Date:** If applicable, enter the expiry date

IMPORTANT:
It is critical that the information entered here aligns <u>**exactly**</u> with the information on your certificate/licence. This section <u>**cannot**</u> be amended once submission has occurred, resulting in re-commencing the entire process if any errors are located.

4. Click Add Attachment

Attachments

No attachments have been uploaded for this profile item.

Add Attachment

---
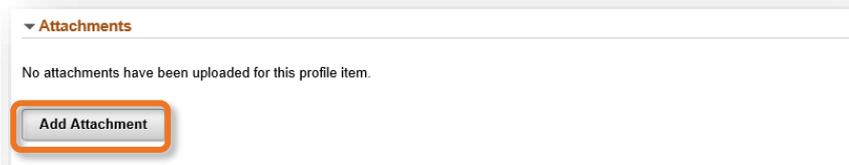
5. Click **My Device**, locate the attachment on your computer and **double click** to add it.
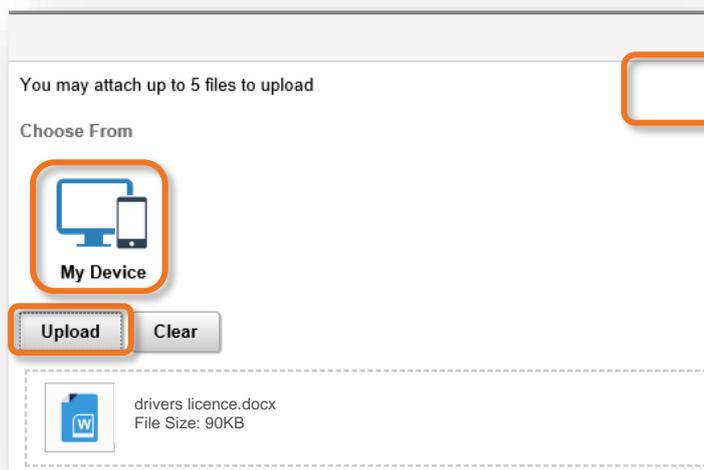
6. Click **Upload.** The document will now appear in the section below.

7. Click **Done** to commence the approval process.

You may attach up to 5 files to upload

Choose From

My Device

Upload   Clear

drivers licence.docx
File Size: 90KB

---

8. The document will appear at the bottom of your screen. Take the opportunity to ensure all mandatory information has been entered correctly, if so click **Continue.**

Continue

Attachments

File Name	Description	Attached On	Action
first_aid.docx		17/01/2019 9:36:58AM	Delete Attachment

*If the document you have attached is incorrect, simply select **Delete** Document and upload a replacement.*

---

9. The document is now required to be sent to your Line Manager for approval prior to it appearing on your Talent Profile.

Click **Submit for Approval**.

Licenses and Certifications

Submit for Approval

License Type	Status	Edit/View
Drivers Licence	New	>

*Although all your licences will appear here, only the **New** item will be sent for approval.*

10. A final pop up will appear verifying which document is going to be sent for approval. Click **Submit** to finalise this process.

Both you and your line manager will receive a confirmation email pertaining to your submission. Please keep this for your own records.

*Submitted documents will have **Pending Approval** status until they have been approved by your line manager.*
For Blue/Yellow cards, People Experience approval is also required.

IMPORTANT:

SUBMIT ONE ITEM PER TRANSACTION

If you have more than one certificate/licence to upload, for example Drivers Licence AND Fork Lift Ticket, they must be submitted for approval in separate transactions.

Make sure to complete all steps for each certificate/licence you are uploading to prevent the upload process from failing.

Once your certificate/licence has been approved you can view it via **Employee Self Service > Talent Profile** in PeopleSoft.

Once a certificate/licence is approaching its expiry date you will alerted via email that renewal is required shortly.

Alerts for all certifications display on the **Alerts** section of the **Employee Self Service Dashboard**.

Remember: it is your responsibility to ensure all mandatory certificates/licences remain current, and a copy has been saved in PeopleSoft. Please make sure you stay up to date by checking the Alerts section of your profile regularly.

# Manager Dashboard – Certificate/Licence Approval Workflow

What's your browser?

Please ensure you are using the Google Chrome browser to update certificates/licences on PeopleSoft.

1. Managers can action all outstanding approvals in two ways:

*   **Received an email?** Follow the link provided in the alert which will take you directly to the specific user's approval page. **Go to Step 5 of this Quick Guide**

*   **From PeopleSoft**
    Click **Approvals** on the Manager Self Service Dashboard. **Go to Step 2 of this Quick Guide**

    Note: You will not be able to approve certificates/licences via Team Profile or Alerts
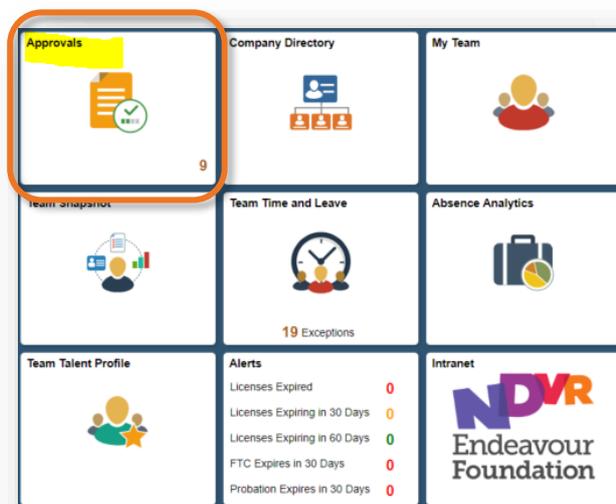
2. Click **Person Profile** and then **select** the applicable user
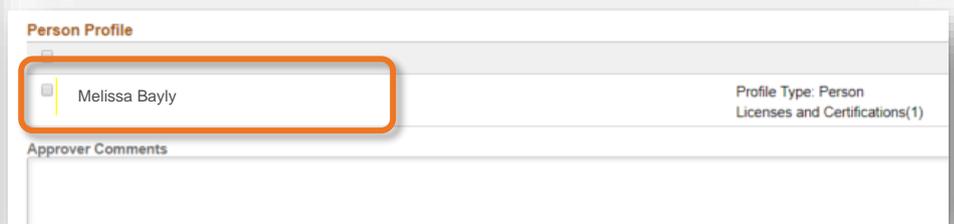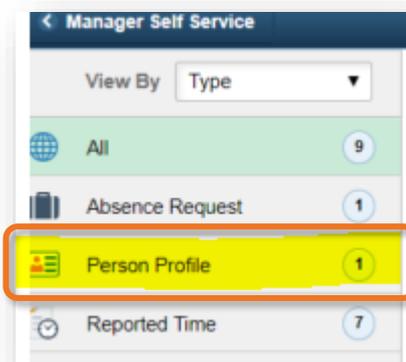
3. To view the uploaded certificate/licence and its details click the '**>**' arrow

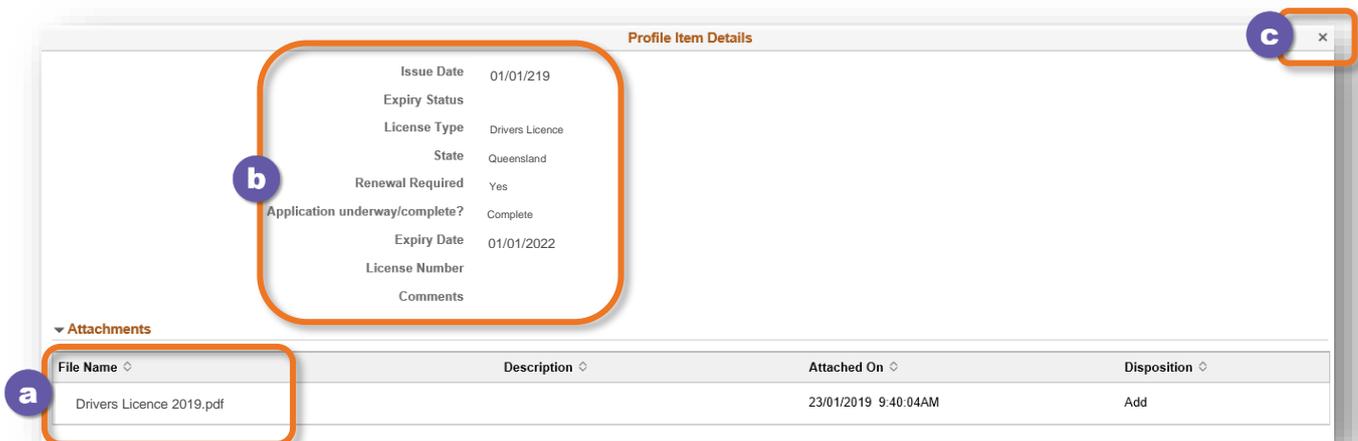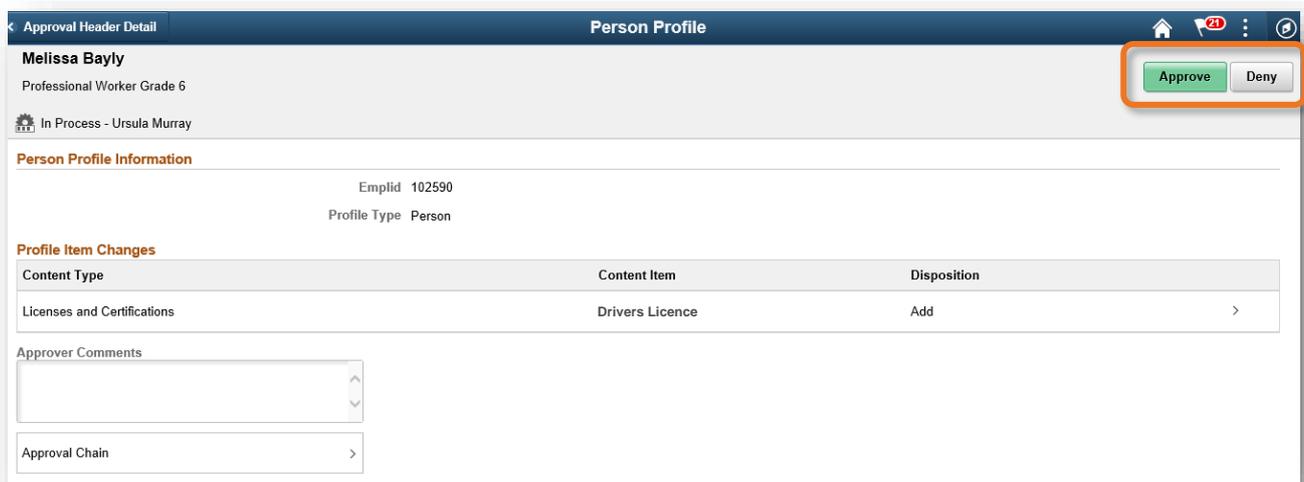**4**. (a) **Review** the attachment, (b) ensuring the **details align** with what has been entered, (c) **close** the screen to return to the Approval/Deny page.

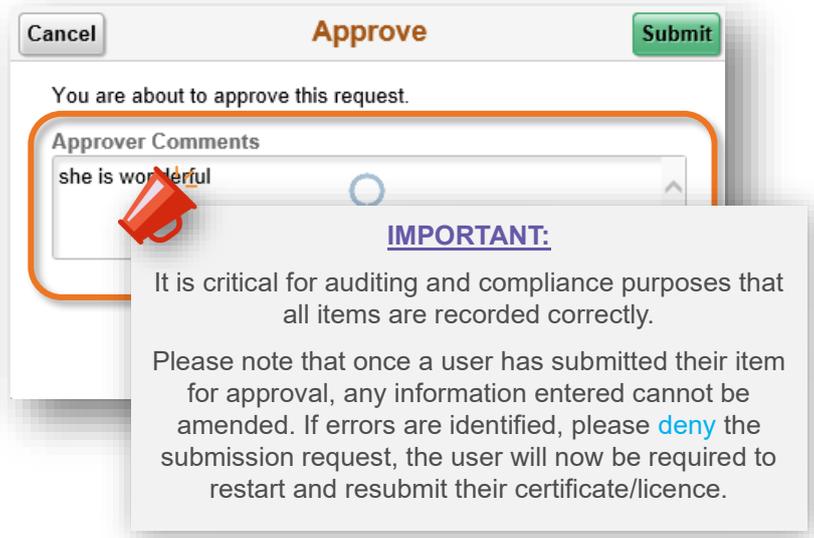
5. Click **Approve** or **Deny**

6. Approver Comments

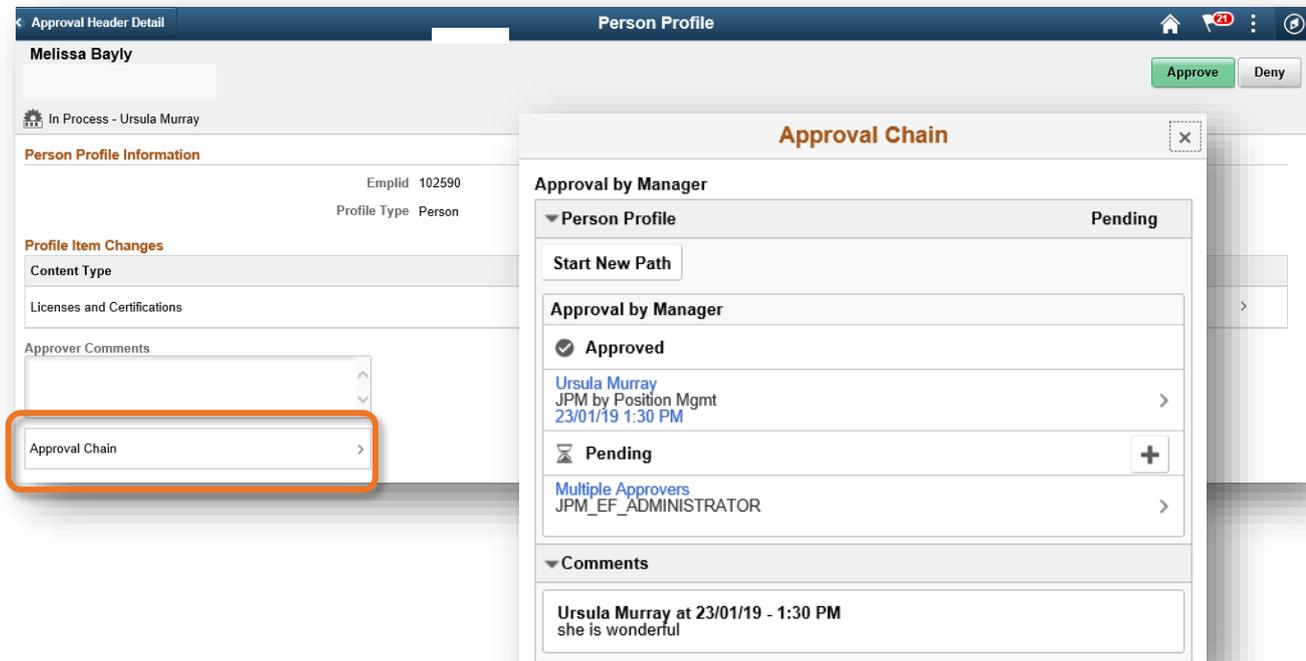**Approve:** provide any feedback if required and hit **Submit**.

Deny: outline any required amendments in the **Approver Comments** field and hit **Submit**.

Once submitted an email will be sent to the applicable staff member confirming the outcome, it will also include any comments that you may have added.

Cancel	**Approve**	Submit

You are about to approve this request.

Approver Comments

she is wonderful

IMPORTANT:

It is critical for auditing and compliance purposes that all items are recorded correctly.

Please note that once a user has submitted their item for approval, any information entered cannot be amended. If errors are identified, please deny the submission request, the user will now be required to restart and resubmit their certificate/licence.

7. Audit Trail

For security purposes a full audit trail is available for each transaction which allows you to see when certifications have been submitted and approved.

Approval Header Detail   Person Profile

Melissa Bayly   Approve   Deny

In Process - Ursula Murray

Person Profile Information

Emplid 102590

Profile Type Person

Profile Item Changes

Content Type

Licenses and Certifications

Approver Comments

Approval Chain   >

Approval Chain   ✕

Approval by Manager

▼ Person Profile   Pending

Start New Path

Approval by Manager

✓ Approved

Ursula Murray
JPM by Position Mgmt
23/01/19 1:30 PM   >

⏳ Pending   +

Multiple Approvers
JPM_EF_ADMINISTRATOR   >

▼ Comments

Ursula Murray at 23/01/19 - 1:30 PM
she is wonderful

Manager Dashboard
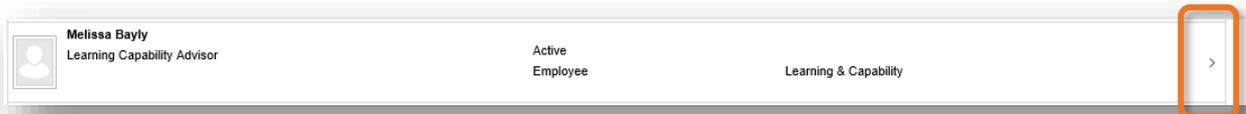## Updating your staff's certificates/licences

What's your browser?

Please ensure you are using the Google Chrome browser to update certificates/licences on PeopleSoft.

1. From your PeopleSoft Manager Self Service Dashboard > Click **Team Talent Profile**

Team Talent Profile

2. Locate applicable employee > Click '**>**'

Melissa Bayly
Learning Capability Advisor

Active
Employee   Learning & Capability

3. **Select** the applicable certificate/licence that requires editing or updating.

If this is a new certificate/licence and is not displaying on your staff members Talent Profile, please complete the steps 2-10 of **'Adding a new certificate/licence type to your PeopleSoft Talent Profile'** located on Page 5 of this Quick Guide.

Licenses and Certifications

License Type	Edit/View
Drivers Licence	>
CPR Certificate	>

Licenses and Certifications

Cancel   Continue

"Issue Date 08/03/2019
Expiry Status +60 davs
License Typ Drivers Licence
Stat Queensland
Renewal Require Yes
ication underway/complete Complete
Expiry Dat 05/03/2022
License Numbe
Comment

5. Mandatory Field:

Click '**+**' to add a copy of the new certificate/licence

6. Click **Continue**

4. **Edit** all applicable information, ensuring the new completion and expiry date has been added

▼ Attachments
+

File Name	Description ◇	Attached On ◇	Action
First_Aid_Cert.docx		08/03/2019 11:25:44	Delete Attachment

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7. Click Submit for Approval

‹ Manager Self Service   **Team Talent Profile**

Rosemarie Hanlon ⊙
People Experience Coordinator
Select Different Employee

Licenses & Certifications	Licenses and Certifications		Submit for Approval
Education	+		

License Type	Status	Edit/View
Blue Card		›
Drivers Licence	Update	›

📢 **IMPORTANT:**

SUBMIT ONE ITEM PER TRANSACTION

If you have more than one certificate/licnce to upload, for example Drivers Licence AND Fork Lift Ticket, you must be "submit for approval" in separate transactions.

Make sure to complete all steps for <u>each</u> certificate/licence you are uploading to prevent the upload process from failing.

---

8. The Request Approval box may pop up. If so, click **Submit** to finalise this process.

The item will now appear on both the individual and Team Talent Profile.

Cancel   **Request Approval**   Submit

Licenses and Certifications

License Type	Status	Attachments
Drivers Licence	New	✅

Comments

Manager Dashboard
Updating your staff's certificates/licences (continued)

9. Click **Approvals** on the Manager Self Service Dashboard.

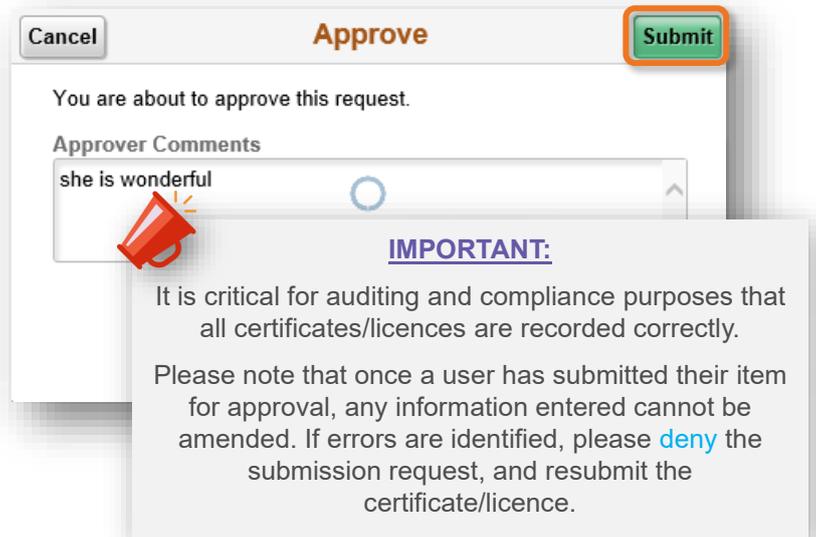**10**. Locate and then **select** the applicable user

11. Click **Approve**

12. **Approver Comments**

Provide any feedback if required and hit **Submit**.

Once submitted an email will be sent to the applicable staff member confirming the outcome, it will also include any comments that you may have added.

IMPORTANT:

It is critical for auditing and compliance purposes that all certificates/licences are recorded correctly.

Please note that once a user has submitted their item for approval, any information entered cannot be amended. If errors are identified, please deny the submission request, and resubmit the certificate/licence.

Troubleshooting

What is your browser?

Google Chrome is the recommended browser for completing the processes outlined in this Quick Guide. If you are experiencing upload issues and are not using Google Chrome, please install it on your local computer and try again.

Issue: I tried to upload my certificate/licence, but when I submitted for approval, it came up with an SQL error.

Solution: Please clear your Cache and attempt re-upload

Clear the Cache on a PC – Internet Explorer Browser

1. On the Internet Explorer Tools menu, click Internet Options. The Internet Options box should open to the General tab.
2. On the General tab, in the Temporary Internet Files section, click the Delete Files button.
3. When the dialog box opens click OK to clear the cache. ...
4. Click OK again to close the Internet Options box.

Clear the Cache on a PC – Google Chrome Browser

1. Go to the three-dot menu at the upper-right corner of Chrome to select Settings
2. Click Advanced > Clear Browsing Data or History > Clear browsing data

Issue: I am attempting to attach a certificate/licence, but the upload doesn't complete or is telling me its invalid

Solution: This is a browser incompatibility issue, usually associated with Internet Explorer. We recommend switching browsers to Google Chrome when utilising PeopleSoft.

Issue: I am attempting to upload my certificate/licence but the '**+**' symbol is greyed out

Solution: PeopleSoft is locked whilst pays are running Tuesday COB – Wednesday COB each week. You will be unable to upload certificates/licences during this outage window – please try again later.

Issue: I have updated my certificate/licence but am still receiving alerts from the system

Solution: This usually occurs when the completion and/or expiry dates have not been entered correctly or the submit for approval process has not been completed. Please recomplete all steps in **Updating your current certificate/licence in PeopleSoft** located on Page 3

Issue: Error Message: "Attachment upload failed with return code 12"

Solution: The attachment you are attempting to upload is in an incompatible format. Please convert it to either: JPEG, PNG, DOCX, or PDF and try again

Issue: I received an error message when attempting to approve my staff's certificate/licence upload?

Solution: This error [email details issue] usually occurs when employee submits multiple certificates and/or licences in a single transaction. This issue can be identified by the presence of '$' in the details section of the approval email alert.

Employees are requested to upload and re-submit the certificates/licences individually.

An error occurred while attempting to display the selected transaction.Please contact administrator.

Originator: :$:3
Employee ID: :$:4
Name: :$:2
Profile Type: :$:5
Profile Status: :$:6
Comments: :$:7

If these troubleshooting tips do not fix the issues you are experiencing with certificate/licence uploads, please reach out to **People Experience** via peopleexperience@endeavour.com.au.

Please include a screenshot of any errors as well as a copy of your certificate/s in case we need to manually intervene.