

The Knowledgebase

The Knowledgebase is an online place where you can quickly look up information about how to use our district's Zangle, Encore, and PeopleSoft applications. It works like most typical software help menus. You can type in a keyword, click the Search button, and then you can choose to read any of the articles whose titles and first paragraphs are then displayed on your screen.

The following steps walk you through how to locate and use the Knowledgebase.

How to Find the Knowledgebase



1. Go online to this web site:

www.sandi.net/dwa

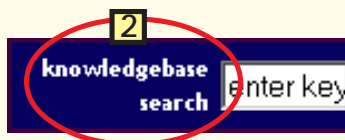
2. Once you are there, click either the **Zangle**, **Encore**, or **PeopleSoft** link. If you want to find articles on Zangle only, click the Zangle link; for articles on PeopleSoft only, click the PeopleSoft link, etc. For the purpose of illustration in this Job Aid, we clicked on the PeopleSoft link. **1**

How to Browse Knowledgebase Articles



The Knowledgebase has many articles on different topics. To see all the topics at once (and be able to click on a topic of your choice) do the following:

1. Find the **Knowledgebase Search** textbox in the upper-right corner of the screen. **1**



2. Click on the link “**knowledgebase search**”. **2**



3. You will see a display of article topics called “tags”. Each tag is a clickable link. When you click a tag you will be taken to a screen that displays one or more articles whose content relates to that topic. For the purpose of illustration in this Job Aid, we clicked on the **Budget** tag. **3**

The Knowledgebase

Knowledgebase
 Knowledgebase search results for the 'Budget' keyword
 Total of 7 articles found.
 click the subject title to read the entire article or [search again](#).

[Advanced Search](#)

KB articles

416 - [How to Find the Posted Budget Transactions Report](#)
 The Budget Transactions Report is a large, comprehensive report that provides detailed information about the status of all your budgets for your school site/department. You can view this report whenever you want to, on your own (please see the related Job Aid for more details) ... (more)

460 - [Chartfield Setup for Travel Expenses](#)
 A Chartfield is a small textbox where you have to type in a piece of a budget code number (usually 4 or 5 digits). Each Chartfield has its own name, and represents a different part of a long budget number. A Chartfield String is made up of several (usually about 8) different Chartfields strung together in a sentence. A Chartfield String represents a single budget.

418 - [What is Budget Checking in eProcurement?](#)
 Budget-checking in eProcurement is the process whereby a chosen budget account is accessed and funds (money) from that budget account are pre-encumbered for a specific

4 a **4 b**

4. You will then see a page displaying all of the articles that relate to the topic (tag) you chose. Each article is identified by a unique number, called a “KB” number. **4 a**

Each article also has its own title. To read the entire article, you must click on its title. **4 b**

You can also search for an article by its number, if you wish (this method is shown later in this Job Aid). Each article has its own KB number (Knowledgebase number) that identifies it within the Knowledgebase.

Knowledgebase
 Complete article
 New search

KB#	460	Date	9/26/2006
Subject	Chartfield Setup for Travel Expenses		

A Chartfield is a small textbox where you have to type in a piece of a budget code number (usually 4 or 5 digits). Each Chartfield has its own name, and represents a different part of a long budget number. A Chartfield String is made up of several (usually about 8) different Chartfields strung together in a sentence. A Chartfield String represents a single budget.

You have to have the correct Chartfield String entered in the correct screen, and saved there, before you can create or submit Travel Authorizations or Expense Reports.

The individual Chartfields you will be dealing with are named thusly:

- Department
- Resource
- Bud Ref (Budget Reference)
- Program
- Class

5

5. After you click the title of the article you want, the entire article opens up for you. You might need to scroll your page up or down to read the whole article. At the top of the article a date is shown telling you when it was published. **5**

The Travel & Expenses manual explains how to set up your Chartfield String with detailed, step-by-step instructions. So does the Mileage manual. These manuals are given out in the Expenses and Mileage classes. If you don't have one, you can attend a class (which is a good idea anyway, if you have not attended one yet); or you can simply click on the following hyperlinks to view the manuals, and print them out on your own, if you like.

[Travel & Expenses Manual](#)

[Mileage Manual](#)

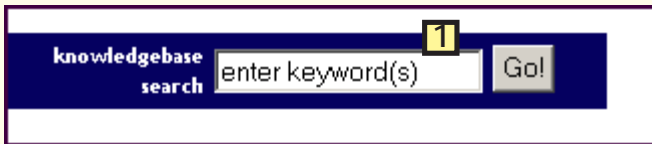
keywords: [Budget](#) | [Expenses](#) | [Mileage](#) | [Travel](#) | [Chartfield](#)

6

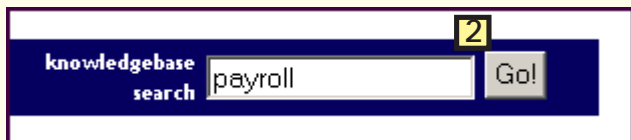
6. At the bottom (or perhaps in the middle) of the article you might sometimes find a link or two that connects you to a Job Aid that can help you. (Job Aids are documents containing step-by-step, illustrated instructions for specific tasks or procedures). You will also see (at the very bottom of every article) single-word links with meanings that are relative to the article. By clicking on any of these links you can find other articles with related content. **6**

The Knowledgebase

How to Locate a Specific Article by Keyword



knowledgebase search



knowledgebase search

1. Go online to this web site:

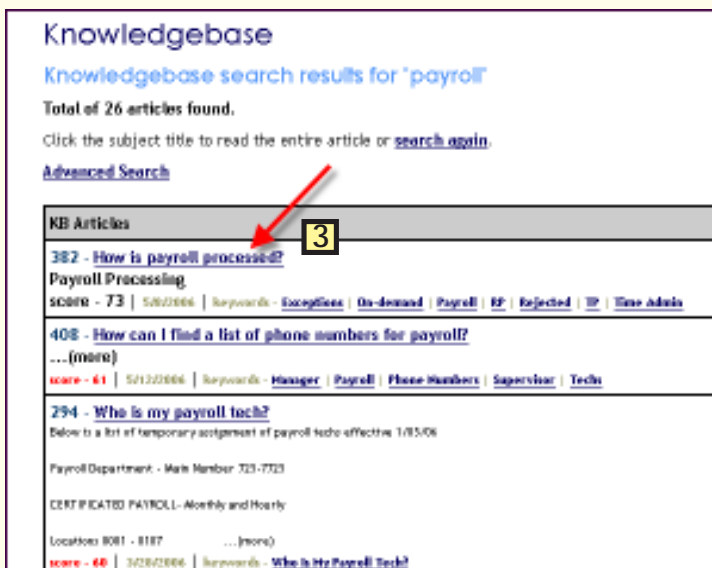
www.sandi.net/dwa

Once you are there, click either the **Zangle**, **Encore**, or **PeopleSoft** link, and then find the “keyword search” box in the upper-right corner. Click inside the search box (where it says “enter keyword(s)”). **1**

2. Type a word related to what you want to read about. In this example, we typed the word “**payroll**”.

Then, click the **Go** button. **2**

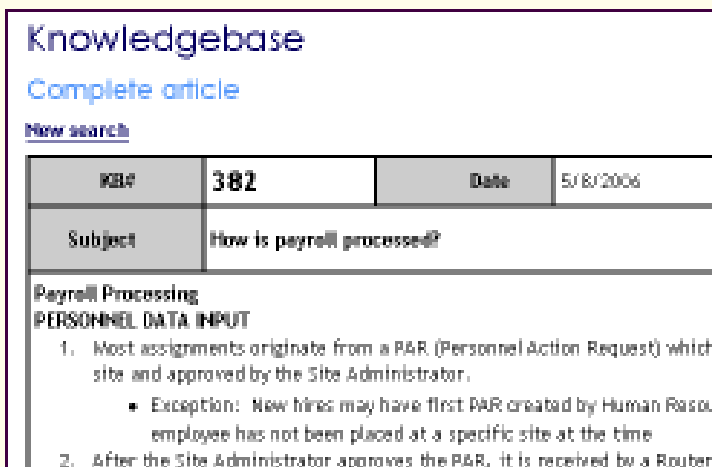
3. A list of related articles appears. Click the title of the article you wish to read. **3**



Knowledgebase
Knowledgebase search results for "payroll"
Total of 26 articles found.
Click the subject title to read the entire article or [search again](#).
[Advanced Search](#)

KB#	Article Title
382	How is payroll processed?
408	How can I find a list of phone numbers for payroll?
294	Who is my payroll tech?

4. The article opens up in its entirety. You might need to scroll your page up or down to read the whole article and to view any links that might be within it.



Knowledgebase
Complete article
[How search](#)

KB#	382	Date	5/ 8/2006
Subject	How is payroll processed?		

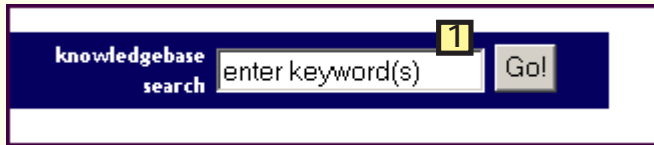
Payroll Processing
PERSONNEL DATA INPUT

- Most assignments originate from a PAR (Personnel Action Request) which site and approved by the Site Administrator.
 - Exception: New hires may have first PAR created by Human Resources employee has not been placed at a specific site at the time
- After the Site Administrator approves the PAR, it is received by a Router

The Knowledgebase

How to Find an Article by Its KB (KnowledgeBase) Number*

* **NOTE:** This can only work for you if you already know the KB number of the article you wish to view.



1. Go online to this web site:

www.sandi.net/dwa

Once you are there, click either the **Zangle**, **Encore**, or **PeopleSoft** link, and then find the “keyword search” box in the upper-right corner of the screen. Click inside the search box (where it says “enter keyword(s)”). **1**



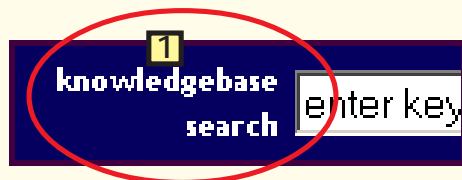
2. Type the KB number of the article you wish to view, and then click the **Go** button. **2**



3. The beginning paragraph of the article is displayed. To read the entire article, click its title. **3**

How to Use “Advanced Search”

The Knowledgebase has an **Advanced Search** feature that lets you search for articles by subject, message body, or KB #. You can find the Advanced Search link at the top of all Knowledgebase search results pages, or just by clicking the words “**knowledgebase search**” by the keyword text box.



1. Go online to this web site:

www.sandi.net/dwa

Once you are there, click either the **Zangle**, **Encore**, or **PeopleSoft** link, and then find the “keyword search” box in the upper-right corner. Click the “**knowledgebase search**” link. **1**

The Knowledgebase

Keyword(s)

KB #

[advanced search](#)

2

2. Click the “**advanced search**” link to open and display the Advanced Search page. **2**

Knowledgebase **3**

Advanced search

You can search the database using keywords found in the subject field, body of the message or by the Knowledgebase article number. You can search by the date the article was posted as well.

Basic search

subject	<input type="text"/>
message body	<input type="text"/>
KB #	<input type="text"/>
<input type="button" value="Search"/>	

3. This is what the Advanced Search page looks like. **3**

Knowledgebase

Advanced search

You can search the database using keywords found in the subject field, body of the message or by the Knowledgebase article number.

Basic search **4**

subject	<input type="text" value="travel authorization"/>
message body	<input type="text"/>
KB #	<input type="text"/>
<input type="button" value="Search"/>	

TO SEARCH BY SUBJECT

4. Using a word or two, type a subject into the **Subject** text box and click **Search**. **4**

Knowledgebase **5**

Advanced search results

Click the subject to read the entire article or [search again](#).

Basic search

KB Articles

466 - Approve a Travel Authorization

Travel Authorizations must be approved by two people - first by the Department Head (of the department who is paying for the travel); and then by the Branch Head of that department.

When a Requester (the person who originates the Travel Authorization) ...[\(more\)](#)

5/26/2006 - keywords: [Approval](#) | [Authorizations](#) | [Travel](#) | [Expense](#)

462 - Create a Travel Authorization

District policy states that all travel, including local conferences, must be approved in advance. This means that if you are going to travel to any conference, workshop, seminar, or other business-related event, where the district is going to pay a fee for you to attend, you ...[\(more\)](#)

5/26/2006 - keywords: [Authorization](#) | [Expense](#) | [Travel](#)

461 - Authorize Others to Create & Submit Travel Expense Forms for You

You can set up another district employee in our PeopleSoft computer system so that they can act as your proxy. They could then create and submit Travel Authorizations and Expense Reports on your behalf, for when you plan to travel (like to a conference or

5. All articles related to your subject appear in a list. You can click any article title in the list to read the full article. **5**

The Knowledgebase

Knowledgebase

Advanced search

You can search the database using keywords found in the subject field, body of the message or by the Knowledgebase article number.

Basic search

subject	<input type="text"/>
message body	<input type="text" value="posted budget report"/>
KB #	<input type="text"/>
<input type="button" value="Search"/>	

TO SEARCH BY MESSAGE BODY

6. Type a phrase into the **Message Body** text box and click **Search**. **6**

Knowledgebase

Advanced search results

Click the subject to read the entire article or [search again](#).

Basic search

KB Articles
476 - How to Find the Posted Budget Transactions Report The Budget Transactions Report is a large, comprehensive report that provides detailed information about the status of all your budgets for your school site/department. You can run this report whenever you want to, on your own (please see the related Job Aid entitled ... (more) 4/20/2006 - keywords - Report Transaction Budget
469 - Half Pay Sick Leave at Year End The Education Code allows a district to provide five months of sick leave at no less than half salary to certificated staff under Section 49033 or 108 days of sick leave at no less than half salary to classified employees under Section 45116. We have clarified language in procedure 7130. 9/26/2006 - keywords - Sick Leave Half Pay
462 - Create a Travel Authorization District policy states that all travel, including local conferences, must be approved in advance. This means that if you are going to travel to any conference, workshop, seminar, or other business-related event, where the district is going to pay a fee for you to attend, you ... (more) 5/26/2006 - keywords - Authorization Expense Travel

7. All articles that contain that phrase (or something similar) appear in a list. You can click any article title in the list to read the full article. **7**

Knowledgebase

Advanced search

You can search the database using keywords found in the subject field, body of the message or by the Knowledgebase article number.

Basic search

subject	<input type="text"/>
message body	<input type="text"/>
KB #	<input type="text" value="460"/>
<input type="button" value="Search"/>	

TO SEARCH BY KB

8. Type the KB number of the article you want into the **KB #** text box and click **Search**. **8**

KB Articles

460 - Chartfield Setup for Travel Expenses A Chartfield is a small textbox where you have to type in a piece of a budget code number (usually 4 or 5 digits). Each Chartfield has its own name, and represents a different part of a long budget number. A Chartfield String is made up of several (usually about 8) diff... (more) 10/26/2006 - keywords - Budget Expenses Message Travel Chartfield
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9. That particular article appears. To view the entire article, click on its title. **9**

The Knowledgebase

How to Find Help and Support

Step 1: Read your **Manuals, Handbooks, and Job Aids** thoroughly. The answers to many questions can be found in these training materials. But if you still need help, go on to Step 2.

Step 2: Attend an **Open Lab or Help Camp** session. These are first-come-first-served help clinics where (after you have attended the training class) you can receive individualized, one-on-one assistance from an IT instructor. To see the current Open Lab and Help Camp schedules, go online to these web sites:

<http://www.sandi.net/peoplesoft/training>

<http://www.sandi.net/encore/training>

After you have attended **Open Lab/Help Camp**, if you still need help, go on to Step 3.

Step 3: Contact the current designated "Subject Matter Expert" (SME) whose task is (among many other things) to provide personalized support as needed. To see who this person is for PeopleSoft issues, and how to contact h/her, please refer to the Job Aid entitled "**Financials Support Contact List.**" This document is found online:

<http://www.sandi.net/peoplesoft/readandlearn/jobaids>

For information on SME's for Zangle or Encore, please visit their respective web sites:

<http://www.sandi.net/zangle>

<http://www.sandi.net/encore>