

HUMAN RESOURCES MANAGEMENT SYSTEM

PeopleSoft Version 8.9 Time & Labor Payroll Approver Training

University of Houston System
Training/ Reference Guide

Overview

Monthly Employee Time Approval-Payroll Approver

For the purpose of Time & Labor all monthly employees who currently report leave time on a timesheet are classified as Time Reporters. All employees that currently approve time on a timesheet are classified as Time Approvers. Those employees who currently reconcile leave, reconcile payroll, distribute timesheets, submit timesheets to the Payroll Office, and run payroll reports are classified as the Payroll Approvers. This training guide will walk Payroll Approvers through logging into PeopleSoft and approving payable time in Manager Self Service. The training guide will include the Time Approver and Time Reporter instructions. Users will log into PeopleSoft at www.my.uh.edu using their User ID and password. If the User ID/password is unknown the users may click on “Request a New Password” or “Request my User ID” to have a new password or their User ID emailed to them.

Manager Search Option Setup

The first step the Payroll Approver should do is set up a Search Option in Manager Self Service. This allows the Payroll Approver to establish search options to meet the needs of each individual Payroll Approver.

Navigation: HR & Campus Solution 8.9>Manager Self Service>Time Management>Manager Search Options

The Payroll Approver can make any changes to the search options that are used or displayed on the page when searching within Manager Self Service. This page is where the Payroll Approver can set the Group ID that has been assigned to the Time Approver. Entering your Group Id will cause the Time Approvers Group Id to default in when the Payroll Approver opens the Search Pages. Even setting the Group ID on this page the Payroll Approver can still change the Group ID on the actual search page if a different Group ID is needed to be used.

Description	Value	Include in Criteria	Include in List
Group ID	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EmpID	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Empl Rcd Nbr	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Business Unit	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Code	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Job Description	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Department	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location Code	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
North American Paygroup	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Workgroup	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Position Number	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Auto Populate Option
 Auto Populate Results
 Prompt for Results

Criteria Defaults
 Collapse Criteria
 Expand Criteria

Show Schedule Information

The Payroll Approver can also change which fields are to be available for search criteria and those fields that will be shown when the search is returned. The Payroll Approver can also set the Auto Populate Results button so that each time the Payroll Approver goes to a search page it will attempt to return those employees that are associated with the Time Approver. **Caution: This will make the page load slowly every time the Payroll Approver goes to a search page.** So use this option carefully. If you have a large number of Time Approvers then changing this option would not be advisable. One note of importance, if you turn off INCLUDE IN LIST options that are not associated with INCLUDE IN CRITERIA these options cannot be turned back on after they have been turned off.

Email Notifications

Initially, the email notification process will run weekly, sending email notices to Payroll Approvers and Time Approvers indicating there is time that needs to be approved. The Payroll Approver will log into PeopleSoft to approve pending payable time.

Approving Pending Payable Time

Navigation: HR & Campus Solution 8.9>Manager Self Service>Time Management>Approve Time and Exceptions>Payable Time

Enter the Group ID, enter the start and end dates and click Get Employees

Approve Payable Time

Approve Time for Time Reporters

Employee Selection Criteria	
Description	Value
Group ID	<input type="text" value="H1001"/>
EmpID	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Department	<input type="text"/>
Workgroup	<input type="text"/>
Position Number	<input type="text"/>

Start Date End Date

No employees were returned for the time period specified.

Go To: [Manager Self Service](#)
[Time Management](#)

To correct or change time reported the Payroll Approver will click on 'Adjust Reported Time' the screen will appear, highlight the hours to be updated and click delete or change the hours, click the 'Submit' button.

Timesheet

Time Reporter21 EmplID: 0087698

Job Title: Artistic Advisor (KUHF) Empl Rcd Nbr: 0

[Click for Instructions](#)

View By: Date: [<< Previous Week](#) [Next Week >>](#)

Reported Hours: 24.00 Hours Scheduled Hours: 0.00 Hours [Next Employee >>](#)

From Monday 03/16/2009 to Sunday 03/22/2009

Timesheet

Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Total	Time Reporting Code	Taskgroup
<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	24.00	<input type="text" value="180 - Sick Used Salaried"/>	<input type="text" value="PSNONCATSI"/>

The user will see the change in the 'Reported Time Status' section.

[Reported Time Status - click to hide](#)

Date	Status	Total	Time Reporting Code	Comments
03/16/2009	Approved	8.00	180	<input type="text"/>
03/17/2009	Approved	8.00	180	<input type="text"/>

Click select all and click the 'Approve' button. The user can click on the 'Next Employee' link to continue approving time.

Enter your group id and the date range and click 'Get Employees'

Approve Payable Time

Approve Time for Time Reporters

Employee Selection Criteria Get Employees

Description	Value
Group ID	<input type="text" value="H1001"/>

Start Date End Date

Click the employee name link to view the payable time.

Select an employee and click on the approve button below to approve the employee's time for the time period. Click on the employee's name to view and/or approve the employee's time. You may expand the date range by changing the start and end dates or by leaving them blank. Leave both date fields blank to return all employees with payable time that needs approval.

Employees For Payroll Approver 1

Select	Name	Employee ID	Empl Rcd Nbr	Job	Job Description	Total Payable Hours	Department
<input type="checkbox"/>	Time Reporter21	0087698	0	G1E8	Artistic Advisor (KUHF)	24.000000	H0018

Click the 'Select All' button to highlight all days, select approve, click 'Next Employee' to move the next employee. To make corrections click the 'Adjust Reported Time'

Time Reporter21
EmplID: 0087698
Job Title: Artistic Advisor (KUHF) Empl Rcd Nbr: 0

Select the time you wish to approve and then click the Approve button. Enter a specific Accounting Date for each row of payable time to be published. If you wish to use the current date as the publish date, you may leave the Accounting Date field blank.

Start Date End Date

Approval Details Customize | Find | View All | First 1-3 of 3 Last

Overview **Time Reporting Elements** Task Reporting Elements

Select	Date	Time Reporting Code	Quantity	Type	Accounting Date	Adjust Reported Time	Comments
<input type="checkbox"/>	03/16/2009	180	8.000000	Hours	<input type="text"/>	Adjust Reported Time	
<input type="checkbox"/>	03/17/2009	180	8.000000	Hours	<input type="text"/>	Adjust Reported Time	
<input type="checkbox"/>	03/18/2009	180	8.000000	Hours	<input type="text"/>	Adjust Reported Time	

Select All Clear All

When the screen opens, select the day to adjust and change the hours, click the 'Submit' button to process the change.

From Monday 03/16/2009 to Sunday 03/22/2009

Timesheet

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total	Time Reporting Code	Taskgroup
3/16	3/17	3/18	3/19	3/20	3/21	3/22			
8.00	8.00	8.00					24.00	180 - Sick Used Salaried	PSNONCATSI

Click the 'Select All' radio button and click approve. Click the 'Next Employee' to continue approving employees in the list.

The Time Approver one page training guide follows with the Time Reporter one page training guide.

Enter your group id and the date range and click 'Refresh' or 'Get Employees'

Timesheet Summary

Employee Selection Criteria

Description	Value
Group ID	<input type="text"/>

[Get Employees](#)

View By: **Date:** [Refresh](#) [<< Previous Week](#)

The list of employees needing time approval will appear, click on the first employee on the list.

Employees For Time Approver2, Time Needing Approval From 04/01/2009 - 04/07/2009

Select	Name	Job Description	Hours to be Approved	Reported Hours	Scheduled Hours	Exception	Approved/Submitted Hours	Denied Hours	Employee ID
<input type="checkbox"/>	Time Reporter	Announcer/On-Air Talent 3	8.00	8.00	40.00		0.00	0.00	0145226
<input type="checkbox"/>	Time Reporter20	Announcer/On-Air Talent 3	8.00	8.00	40.00		0.00	0.00	0084857
<input type="checkbox"/>	Time Reporter23	Announcer/On-Air Talent 2	32.00	32.00	40.00		0.00	0.00	0120699

You will view the leave hours reported, click the 'Balance-Click to View' link to see leave balances. If the hours need to be changed enter the correct hours under the date to be changed and click the submit button. Click the 'Select all' link and click the 'Approve' or 'Deny' button. Click the 'Next Employee' link to move to the next employee timesheet.

Timesheet

Time Reporter
 Job Title: Announcer/On-Air Talent 3
 EmpID: 0145226
 Empl Rcd Nbr: 0

Click to view next employee

[Click for Instructions](#)

View By: **Date:** [Refresh](#) [<< Previous Week](#) [Next Week >>](#)

Reported Hours: 8.00 Hours **Scheduled Hours:** 40.00 Hours

[Next Employee >>](#)

From Wednesday 04/01/2009 to Tuesday 04/07/2009

Timesheet

Wed 4/1	Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Total	Time Reporting Code	Taskgroup
4.00							4.00	180 - Sick Used Salaried	PSNONCATSI
	4.00						4.00	420 - Unpaid Leave Salaried	PSNONCATSI

[Submit](#)

[Reported Time Status - click to hide](#)

Select	Date	Status	Total	Time Reporting Code	Comment
<input type="checkbox"/>	04/01/2009	Needs Approval	4.00	180	
<input type="checkbox"/>	04/02/2009	Needs Approval	4.00	420	

[Select All](#) [Deselect All](#) [Approve Selected](#) [Deny Selected](#)

Click 'Approve' or 'Deny'

[Reported Hours Summary - click to view](#)

Click 'Select All'

[Balances - click to hide](#)

Click link to view leave balances.

Plan Type	End balance as of 04/01/2009
Sick	444.000
Vacation	

When all employees are approved, click on the 'Return to Select Employees' link, click the 'Refresh' button, the search screen will appear blank, once all employees are approved.

Time Reporter

Job Title: Coord, Program

EmplID: 0130566

Empl Rcd Nbr: 0

Enter the date and click refresh to advance to the desired date.

Click Previous Week or Next week to advance to the week time will be entered.

[Click for Instructions](#)

View By: Week Date: 04/01/2009 Refresh

<< Previous Week

Next Week >>

Reported Hours: 24.00 Hours Scheduled Hours: 0.00 Hours

From Wednesday 04/01/2009 to Tuesday 04/07/2009

Timesheet

See the list of Time Reporting Codes below

Wed 4/1	Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Total	Time Reporting Code	askgroup
		8.00			8.00		16.00	180 - Sick Used Salaried	PSNONCATSI
	8.00						8.00	180 - Sick Used Salaried	PSNONCATSI

Click the - sign to delete rows or the + sign to add rows.

Submit

Click the submit button after all hours or changes are made.

[Reported Time Status - click to hide](#)

Date	Status	Total	Time Reporting Code	Comments
04/02/2009	Needs Approval	8.00	180	
04/03/2009	Needs Approval	8.00	170	
04/06/2009	Needs Approval	8.00	170	

Click the comment icon to advance to comment screen.

[Reported Hours Summary - click to hide](#)

Category	Wed 4/1	Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Total
Total Reported Hours		8.00	8.00				8.00	24.00

[Balances - click to hide](#)

Click the blue links to provide full display of the data.

Plan Type	End balance as of 04/01/2009
Sick	592.000
Vacation	302.000

The Time Reporting Codes drop down list consists of the following codes:

TRC	Description	Definition
010	Regular Earnings Monthly	Monthly regular hours worked
061	Faculty Development Leave	Faculty development leave of absence
075	College Release Time Monthly	College release time 3-hrs per week
077	Fitness Release Time Monthly	Fitness release time monthly (other campuses)
079	Professional Rels Time Monthly	Organization meetings, functions, etc.
120	Bereavement Leave Monthly	Leave for death in immediate family
140	Jury Duty Month	Jury duty monthly
150	Holiday Pay Monthly	Holiday pay monthly
170	Vacation Used Monthly	Vacation leave time
180	Sick Used Monthly	Sick leave time
185	Marrow Donor Leave Monthly	Bone Marrow Donor Leave
186	Organ Donor Leave Monthly	Organ donor leave
187	Blood Donor Leave Monthly	Blood donor leave
230	Military Leave Monthly	Military leave monthly
420	Unpaid Leave Monthly	Unpaid leave monthly
472	Investigation Paid Time Off Monthly	Investigation paid time off monthly
K18	Sick NRA N18	Sick leave time Non Resident Alien N18 Teaching
K19	Sick NRA N19	Sick leave time Non Resident Alien N19 Study/training
N18	NRA Code 18 Teaching	Non Resident Alien N18 Teaching regular hours worked
N19	NRA Code 19 Study/training	Non Resident Alien N19 Study/Training regular hours worked
V18	Vacation NRA N18	Vacation leave time Non Resident Alien N18 Teaching
V19	Vacation NRA N19	Vacation leave time Non Resident Alien N19 Study/Training