

HUMAN RESOURCES MANAGEMENT SYSTEM

PeopleSoft Version 8.9 Time & Labor Time Approver Training Monthly Employees

University of Houston System
Training/ Reference Guide

Overview

Monthly Time Approver-Approval Process

For the purpose of Time & Labor all employees that currently approve leave time on a timesheet are classified as Time Approvers. This training guide will walk Time Approvers through logging into PeopleSoft and approving pending reported time in Manager Self Service. 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 Time Approver should do is set up a Search Option in Manager Self Service. This allows the Time Approver to establish search options to meet the needs of each individual Time Approver.

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

The Time 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 Time 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 Time Approver opens the Search Pages. Even setting the Group ID on this page the Time Approver can still change the Group ID on the actual search page if a different Group ID is needed to be used.

Manager Search Options

Select Default Criteria and Options

Time Approver

Enter the Employee Selection Criteria you want to use when searching for employees. This search information will be the default for Time Management pages where there is an Employee Selection Criteria option. A partial value may be entered in any search field to get a list of employees with similar values.

| Description | Value | | Include in Criteria | Include in List |
|-------------------------|----------------------|--|-------------------------------------|-------------------------------------|
| Group ID | <input type="text"/> | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| EmplID | <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 Time 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 Time Approver can also set the Auto Populate Results button so that each time the Time 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 Time Approver goes to a search page.** So use this option carefully. If you have a large number of time reports 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 Time Approver will log into PeopleSoft to approve pending reported time.

Approve Reported Time

Navigation: Manager Self Service>Time Management>Approve Time and Exceptions>Reported Time
Enter the Group Id, and select the date, click refresh then click the Get Employees button

Approve Reported Time

Timesheet Summary

▼ Employee Selection Criteria

| Description | Value |
|-----------------|------------------------------------|
| Group ID | <input type="text" value="H1242"/> |
| EmplID | <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"/> |

Select an employee and click on the approve or deny button below to approve or deny the employee's time. Click on the employee's name to view, approve and/or deny the employee's time. You may select different view by options - by week, by date, all time before or all time after the specified date.

Show Schedule Information

View By: ▼

Date:

[<< Previous Week](#) [Next Week >>](#)

Use the 'View By' to select day or week, time before or time after isn't used.
Type in the 'Date' and click the Refresh button.
Use the 'Previous Week' link to move to the previous week.
Use the 'Next Week' link to move to the next week

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](#)

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

[Next Week >>](#)

[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

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

EmplID: 0130566
Empl Rcd Nbr: 0

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

[Click for Instructions](#)

View By:

Date: 04/01/2009

[<< 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 | Taskgroup |
|---------|---------|---------|---------|---------|---------|---------|-------|--------------------------|------------|
| | | 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.

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 |