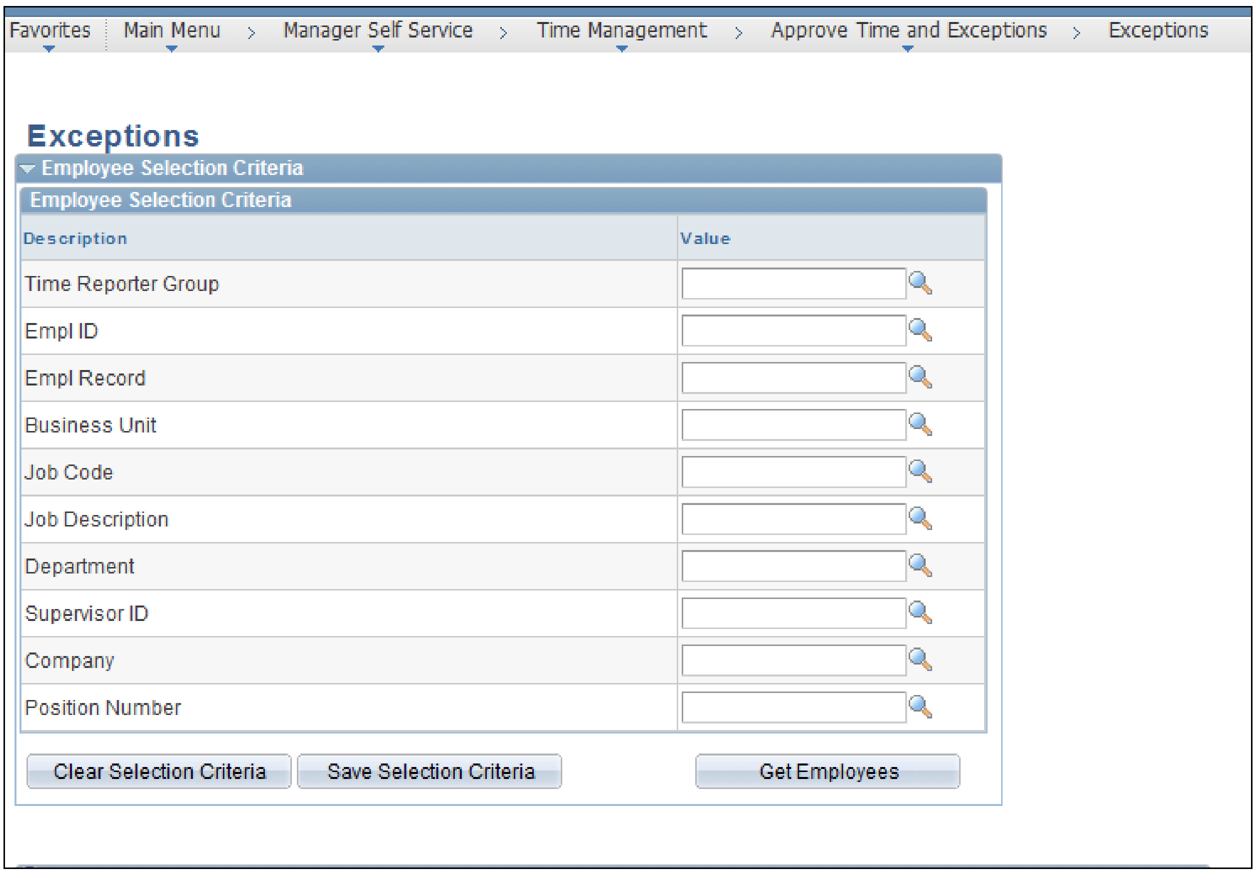
<u>Manager Self Service:</u>

- **<u>Cleaning up Exceptions:</u> Must be done <u>PRIOR</u> to approval of time!**

  Navigation: Manager Self Service> Time Management> Approve Time and Exceptions> Exceptions

You will see a screen with a search field on it. Click **Get Employees**



1. If the screen is blank there are no exceptions and you can proceed to approve.
   a. "Exceptions" are one of four things:
      i. Negative leave (taking time the employee may not have accrued, or will accrue in the current pay period)
      ii. Holiday recorded on a non-holiday
      iii. Regular time recorded on a holiday
      iv. Future dated time entered

You can choose to allow the exceptions, or you can ask the employee to update their A4 and resubmit for approval. <u>If you do not allow the exceptions and the time is not corrected, the employee may not be paid correctly.</u>

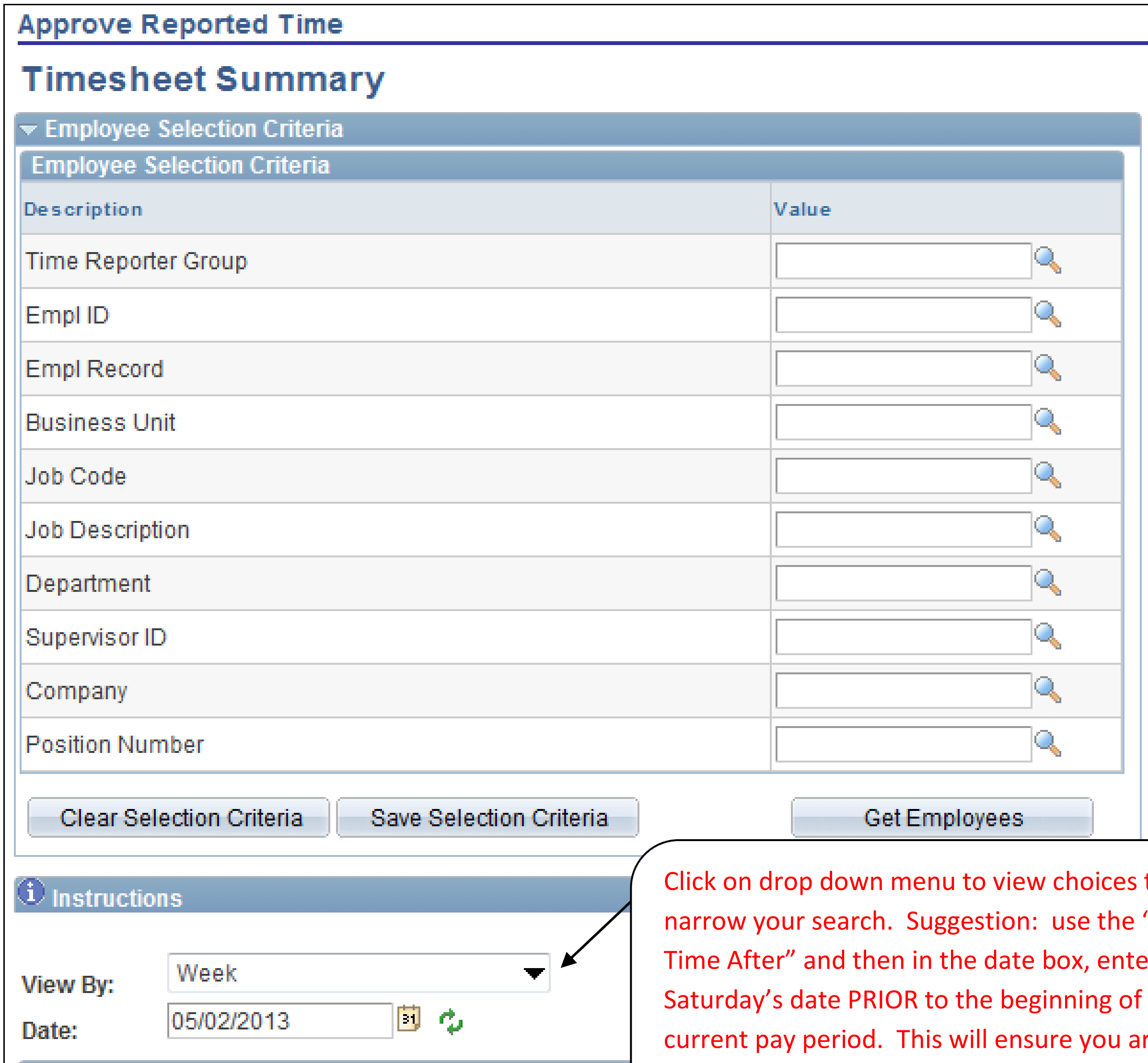
2. If there are any exceptions, they will display at the bottom of the page. It will tell you the employee's name, type of exception and the date for the exception. You have three options:
    a. Allow the exception by clicking in the check box next to the exception time and clicking the **Save** button.
    b. If you discover this on Friday and do not want to allow the exception, contact the employee and have them update and resubmit their time.
    c. If you discover this on Monday and do not want to allow the exception, you will need to edit time on behalf the employee and resubmit for them. See instructions for time entry for more information on entering time on behalf of employees.

- NOTE: Allowing an exception will enable the time to be processed and create payable time without having to resolve the exception. Once an exception has been allowed, it will no longer appear on this page. Time that has an exception with a Low or Medium severity level will still create payable time.

  Payable time will not be created for time with a High severity exception.

- **<u>Time Approval:</u> Done AFTER all exceptions are either allowed, time resubmitted by employee or time corrected by Manager.**

  Navigation: Manager Self Service> Time Management> Approve Time and Exceptions> Reported Time



Click on drop down menu to view choices to narrow your search. Suggestion: use the "All Time After" and then in the date box, enter the Saturday's date PRIOR to the beginning of the current pay period. This will ensure you are approving time for the current pay period.

You will see a screen with a search field on it. **<u>BEFORE</u>** clicking the "**Get Employees**" Button, please look under the instructions bar. Here, you will also see a box for **View by Choices** and a box for a **Date**. The "View by Choices" gives you the opportunity to narrow your search of reported time to approve. You can select one of the following four options:

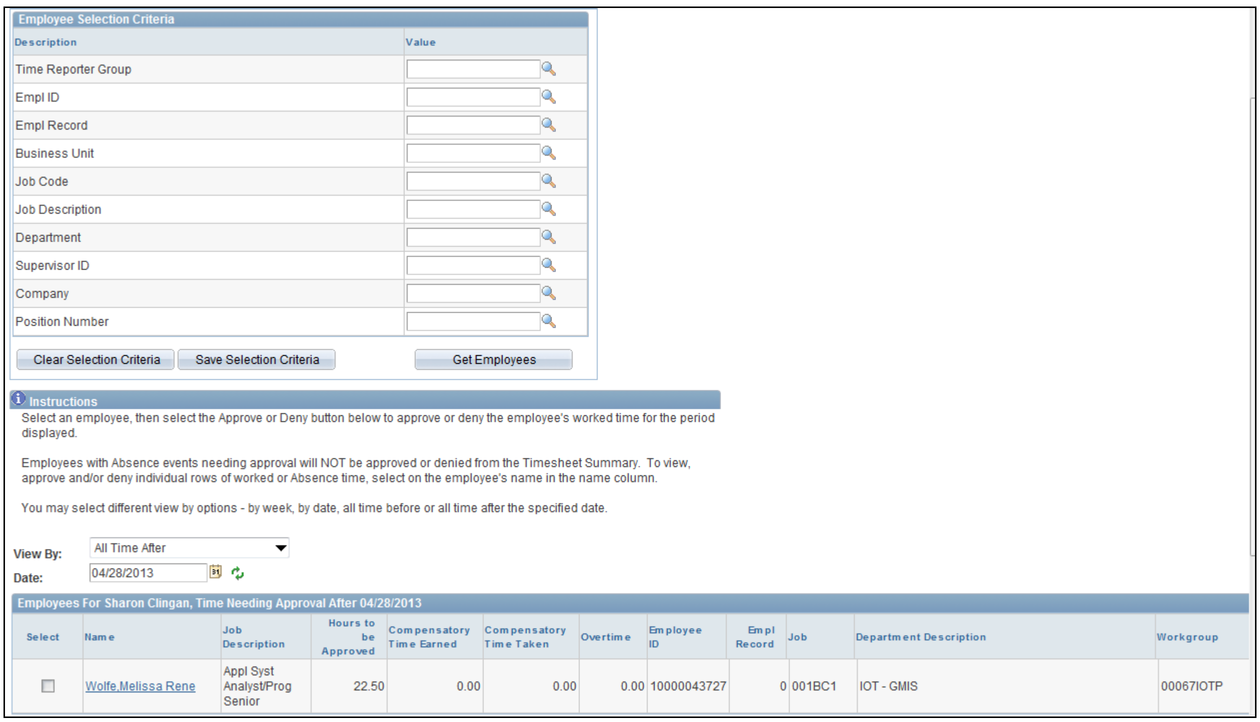
- **All Time After**: pulls all the reported time after a certain date
- **All Time Before**: pulls all reported time before a certain date
- **Day**: pulls all reported time for a certain date
- **Week**: pulls all reported time in the week of a certain date

Once you select a "View By" option, then you will need to enter the date in which to view the reported time. Once you entered the information into both fields, click on **Get Employees**.

The screen will display a list of your employees that have submitted time for approval. If you are missing an employee, check with them to ensure they have submitted their A4 for approval.

There is a variety of employee information as you scroll to the right. The column called "Hours to be Approved" will show you the total hours submitted for approval that time period you selected in your search.

- **NOTE**: the standard number of hours in a pay period is 75 hours. If your employee has less than 75 hours, you will want to review the details of the A4 to verify the hours entered are correct. Even if your employee had leave without pay, they should use the appropriate TRC for that leave so that the total time equals 75 hours. If the employee has more than 75 hours, you will want to review the details of the A4 to verify the overtime hours entered were authorized by you. Intermittent employees (employees not assigned to work 75 hours in a pay period) will have less than 75 hours and that is okay.



Verify the appropriate number of hours were entered and coded correctly by clicking on the employee name to view the details of the submitted hours.

a. Clicking on the employee name will bring up the employee's timesheet. Click on the small arrow beside the Reported Time Status Line. This will bring up a list of the dates, the reported status of each time entry, the TRC for that day and hours associated with that Time Reporting Code (TRC).

b. If you notice any errors, contact the employee to update and resubmit his/her time. However, if you are reviewing time after the Monday following the end of a pay period, the employee will be unable to update his/her time. You can update time on the employee's behalf by making corrections to the timesheet and clicking the "Submit" button directly on the timesheet page.

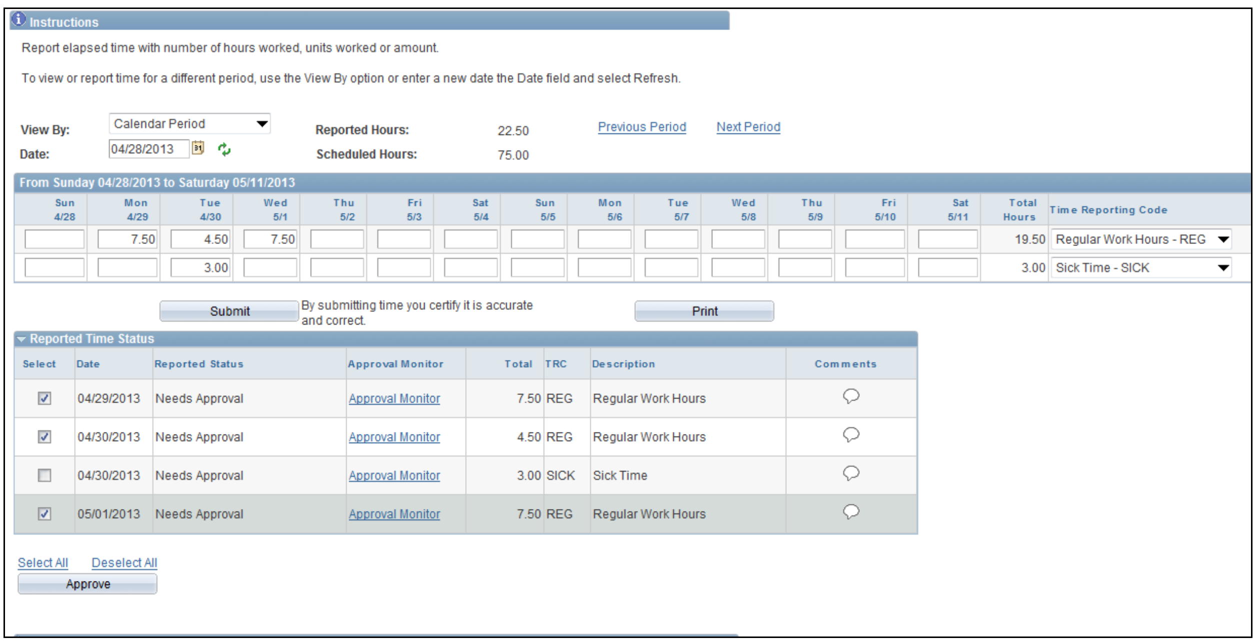
c. To make comments about time you're approving, click on the talk bubble icon on the far right side of the page in the "Comments" column.

   i. The screen will display a comments box. Enter your comments and hit **Save** when you are finished. (You will see a warning message when you click **Save**; click **OK** to continue or click **Cancel** to return to the comments page)

d. To approve each day separately, click in the boxes next to the days you wish to approve and click on the **Approve** button. You can approve all the days at once by clicking the "Select All" link at the bottom of the page and clicking on the **Approve** button.

   ii. **NOTE**: To deselect a day, click in the check box again. This will remove the check mark from the box and will not approve that specific date (all others that are checked will be approved).

   iii. **NOTE**: Once you approve a day, it will disappear from the screen.



3. When you are done viewing the details for the selected employee, click on the "Return to Approval Summary" link at the bottom of the page.
4. Continue clicking on individual names as desired.
5. To approve only certain individuals' time, click on the check box next to their name and then click on the **Approve** button.
    a. When you click **Approve** you will get a warning message asking you if you really want to approve the time selected. Either select **OK** to continue with the approval or click **Cancel** to return to the list of employees.
    b. A save confirmation page will display when the save is successfully completed. Click **OK** to continue.
6. To approve all submitted time at once click the "Select All" link at the bottom of the page and then click on the **Approve** button. This will approve all selected employee time.
    a. **NOTE**: To deselect an employee, click in the check box next to their name. This will remove the check mark from the box and will not approve that specific employee's time (all others that are checked will be approved).
    b. When you click **Approve** you will get a warning message asking you if you really want to approve the time selected. Either select **OK** to continue with the approval or click **Cancel** to return to the list of employees.
        i. **NOTE**: once time is approved it cannot be "unapproved".
    c. A save confirmation page will display when the save is successfully completed. Click **OK** to continue.
7. You can continue to work in PeopleSoft, or sign out of PeopleSoft by clicking the "Sign Out" link in the upper right corner of the web page.

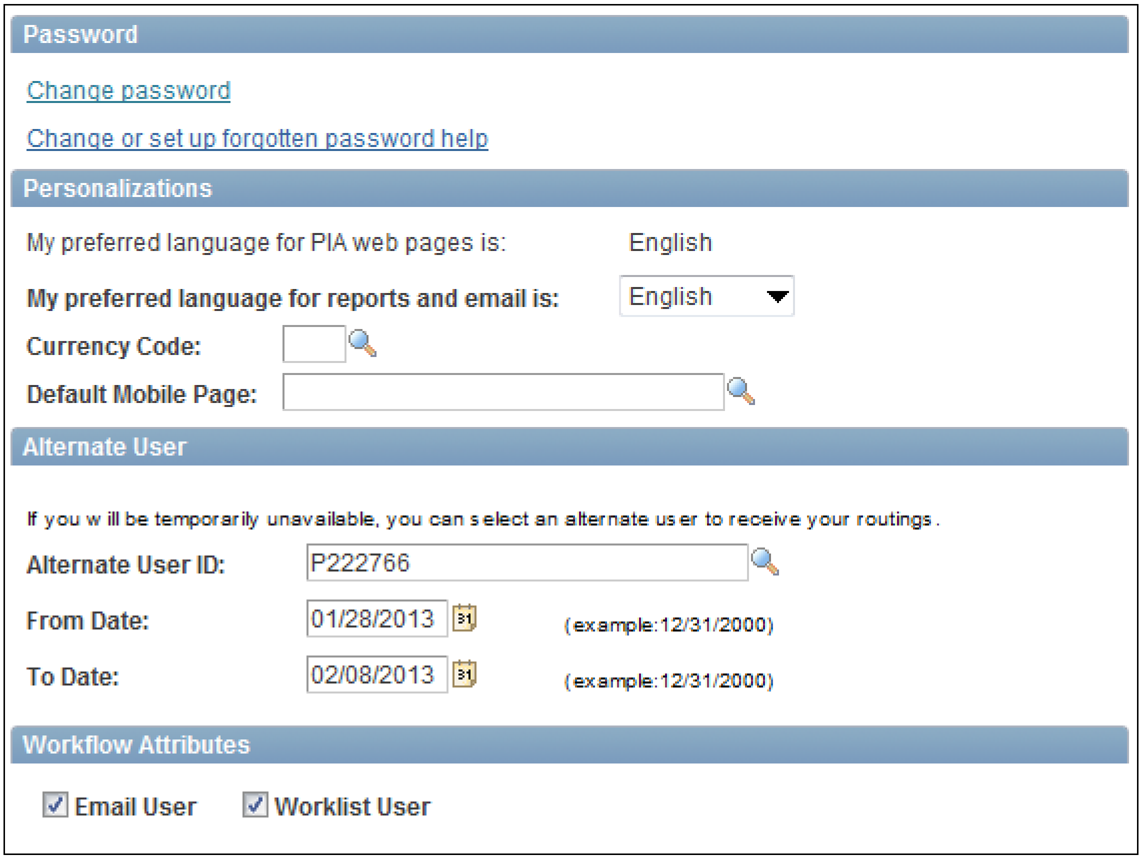
- **<u>Enter Time on Behalf of an Employee:</u>**

    Navigation: Manager Self Service> Time Management> Report Time> Timesheet

1. In the event that an employee is out of the office or otherwise unable to enter his/her own time in PeopleSoft, the manager may enter, edit and/or submit time on behalf of the employee by clicking **Manager Self Service** in the menu on the left side of the screen. An expanded menu will appear. Click on **Time Management**. The menu will expand again. Click on the **Report Time**. The menu will expand again. Click **Timesheet**.
2. A search screen will appear. Click the **Get Employees** button.
3. The list of direct reports will appear on the screen, and the employee names will be blue. Click on the name of the employee whose time you would like to enter/edit.
4. You will be taken to the data entry page for the current pay period. Enter or edit time as you would in your personal A4. When you are finished, click the **Submit** button.
5. To enter time for additional employees, you can click on the "Return to Select Employees" link at the bottom of the screen.

<u>Assigning a Delegated Approver:</u> If a manager will be out of the office on the Friday of a pay period and cannot approve time from this off-site location (PeopleSoft is accessible from any computer with internet access), they can assign a delegate to approve time on their behalf. This person must be another manager, with access to Manager Self Service or they will not be able to approve time.

Navigation: My System Profile



1. Scroll down to the **Alternate User** section. Enter your delegate's PeopleSoft username in the **Alternate User ID** field.
2. Enter the beginning date and the ending date of the delegation in the "From" and "To" fields.
    a. **NOTE:** You can begin and end a delegation on the same day.
3. Click **Save** to save your changes.
4. To remove a delegation before the end date, return to the **My System Profile** page and delete everything out of the Alternate User section. Click **Save**.

- **NOTE**: Once a manager delegates the approval authority to another individual, any time submitted by that manager's direct reports will **<u>ONLY</u>** be visible for approval by the delegated approver for the time period stated in the set up of the delegated approval authority!! **The delegation is based upon the**

submission of the timesheet by the employee. If an employee submits a timesheet before or after the dates of the delegation, the original manager will receive that timesheet for approval.