



City of Minneapolis

PeopleSoft HCM/ELM v9.2 Upgrade

**TIME AND LABOR MANAGER SELF-SERVICE:
STEP-BY-STEP INSTRUCTIONS**

Time and Labor - Manager Self Service

Created on 8/19/2015 5:07:00 PM

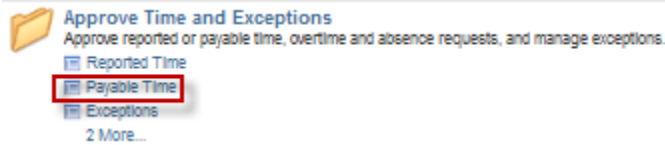


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Time and Labor - Manager Self Service

Approve Payable Time



Menu Path: Manager Self Service > Time Management > Approve Time and Exceptions > Payable Time

Approve Payable Time

Approve Time for Time Reporters

Employee Selection

Employee Selection Criteria	Selection Criterion Value
Time Reporter Group	<input type="text"/>
Employee ID	<input type="text"/>
Empl Record	<input type="text"/>
Last Name	<input type="text"/>
Department	<input type="text"/>
Location Code	<input type="text"/>
Supervisor ID	<input type="text"/>
Reports To Position Number	<input type="text"/>
Job Code	<input type="text"/>
Job Description	<input type="text"/>

Get Employees

Change Time in View

Start Date: 05/25/2015 End Date: 06/28/2015

Personalize | Find | View All | First 1 of 1 | Last

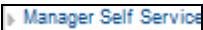

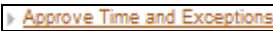
Time Summary	Demographics					
select	Last Name	First Name	Employee ID	Empl Record	Job Title	Total Payable Hours
<input type="checkbox"/>	Last Name			0		0.000000

Select All Deselect All













Approve Push Back





Time Administration Run Control
Manager Self Service
Time Management

Procedure

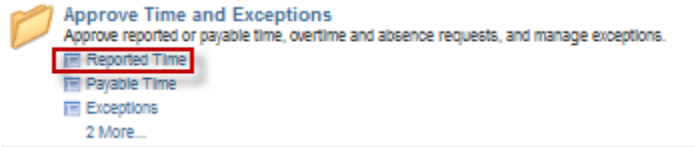
Step	Action
1.	Click the Manager Self Service link. 
2.	Click the Time Management link. 
3.	Click the Approve Time and Exceptions link. 



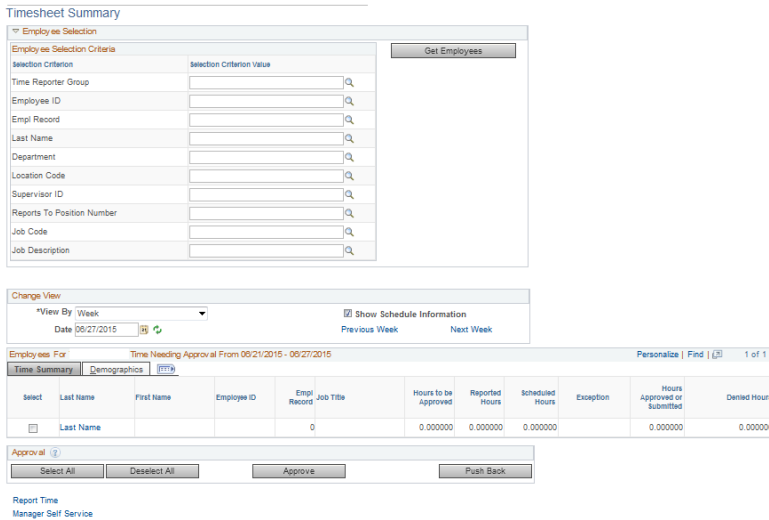
Step	Action
4.	Click the Payable Time link. 
5.	Employee Selection Criteria can be performed by searching for employees by Department . Click in the Department field. 
6.	Enter the desired information into the Department field.
7.	Click the Get Employees button. 
8.	In the Change Time in View section, enter or select a Start Date using the calendar function. Click the Choose a date button. 
9.	Click the Month from the list item. 
10.	Click the desired date. 
11.	In the Change Time in View section, enter or select an End Date using the calendar function. Click the Choose a date button. 
12.	Click the desired date. 
13.	Click the Get Rows button. 
14.	Select the employee's Last Name in the Employees for <Manager> section. Click the <Last Name> link. 
15.	The Approve Payable Time page displays. Payable time for approval is listed for the pay period. Click the Select All link. 
16.	Click the Approve button. 

Step	Action
17.	An approval confirmation message displays. Select the 'Yes' option to confirm and complete the approval. Click the Yes button. 
18.	The Save Confirmation page displays. Click the OK button. 
19.	Click the Return to Approval Summary link. 
20.	Click the Home link. 
21.	End of Procedure.


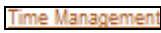



Reported Time - Manager



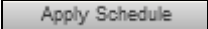

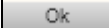




Menu Path: *Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time*

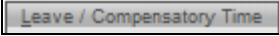



Procedure

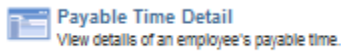
Step	Action
1.	Click the Manager Self Service object. 
2.	Click the Time Management link. 
3.	Click the Report Time link. 
4.	Click the Timesheet link. 
5.	The Employee Search Criteria section is displayed for the Timesheet Summary . In this example, employees are searched for by Department . Click in the Department field. 
6.	Enter the valid information into the Department field.

Step	Action
7.	<p>Click the Get Employees button.</p> 
8.	<p>A list of employees for a department is returned. In the Employees for <Manager> section, select an employee by Last Name.</p> <p>Click the <Last Name> link.</p> 
9.	<p>The Timesheet page displays for the selected employee.</p> <p>Click the Apply Schedule button.</p> 
10.	<p>Using the scroll bar, scroll over to the right side of the Timesheet page.</p> <p>Press the left mouse button and drag the mouse to the desired location.</p>
11.	<p>Click the ChartFields link.</p> 
12.	<p>ChartField Detail shows information for a particular Combination Code. A Combination Code consists of a Fund Code and a Department.</p> <p>Ensure that the correct Combination Code has been selected by the employee.</p> <p>Click the Ok button.</p> 
13.	<p>Using the scroll bar, scroll over to the left side of the Timesheet page.</p> <p>Press the left mouse button and drag the mouse to the desired location.</p>
14.	<p>Selecting the Submit button will approve the timesheet.</p> <p>Click the Submit button.</p> 
15.	<p>The approved time sheet has been submitted.</p> <p>Click the OK button.</p> 
16.	<p>Under the Reported Time Status tab, Reported Time Status is displayed for the approved time.</p> <p>Release the mouse button.</p>



Step	Action
17.	Leave and compensatory time can be displayed by selecting the Leave / Compensatory Time tab. Click the Leave / Compensatory Time link. 
18.	Sick, Vacation and Compensatory Time balances are displayed. Click the Manager Self Service link. 
19.	End of Procedure.

Payable Time Detail - Manager



Menu Path: *Manager Self Service > Time Management > View Time > Payable Time Detail*

Payable Time Detail
Select Employee

Employee Selection

Employee Selection Criteria

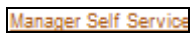
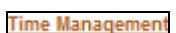

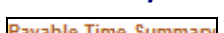
Selection Criterion	Selection Criterion Value
Time Reporter Group	<input type="text"/>
Employee ID	<input type="text"/>
Empl Record	<input type="text"/>
Last Name	<input type="text"/>
Department	B150000
Location Code	<input type="text"/>
Supervisor ID	<input type="text"/>
Reports To Position Number	<input type="text"/>
Job Code	<input type="text"/>
Job Description	<input type="text"/>
Workgroup	<input type="text"/>







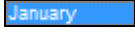


Employees For: Personalize | Find | ²³ First 1-75 of 75 Last

Last Name	First Name	Employee ID	Employment Record Job Title
Abdi	Muhim	123350	0 HR Associate Consultant Supv-C
Adeniyi	Elizabeth	010025	0 HR Consultant, Confidential-C
Anderson	Steven	119735	0 HR Senior Consultant-C
Anderson	Steven	119735	1 HR Principal Consultant-C
Barrett	James	080485	0 Office Support Specialist I-C
Benkuskyy	Patricia	050560	0 HR Senior Consultant-C
Berohem	Renee	123277	0 HR Senior Associate-C
Berg	Brianna	121317	0 HR Associate-C

Note: Employees can be selected by several selection criteria. This example selects employees by **Department**.

Procedure

Step	Action
1.	Click the Manager Self Service link. 
2.	Click the Time Management link. 
3.	Click the View Time link. 
4.	Click the Payable Time Summary link. 

Step	Action
5.	<p>The Select Employee page appears. In the Employee Selection Criteria section, employees can be selected by various criteria. In this example, employees will be searched by Department.</p> <p>Click the Look up Department (Alt+5) button.</p> 
6.	<p>Click in the begins with field.</p> <input data-bbox="342 541 557 579" type="text"/>
7.	<p>Enter a value in the begins with field.</p>
8.	<p>Press [Enter].</p>
9.	<p>Search results are displayed. Select a Department ID link.</p> <p>Click the link.</p> 
10.	<p>Click the Get Employees button.</p> 
11.	<p>A list of employees is displayed in the Employees for <Manager> section.</p>
12.	<p>Select an employee by clicking on a Last Name.</p> <p>Click the <Last Name> link.</p> 
13.	<p>Enter a Start Date or use the Calendar Tool to specify a particular pay period.</p> <p>Click the button.</p> 
14.	<p>Click the list.</p> 
15.	<p>Click the January list item.</p> 
16.	<p>Click the desired date.</p> 
17.	<p>Clicking on the Get Rows icon will refresh payable time for the period selected.</p> <p>Click the Get Rows button.</p> 

Step	Action
18.	<p>Payable Time can be viewed by selecting the Previous Week or Next Week links.</p> <p>Click the Next Week link.</p> <p></p>
19.	<p>Payable Time Detail can be displayed.</p> <p>Click the Detail Page link.</p> <p></p>
20.	<p>Click the Time Reporting Elements object.</p> <p>Status, Reason Code, Time Reporting Code, Quantity TRC Type and Estimated Gross information is displayed.</p> <p></p>
21.	<p>Click the Task Reporting Elements link.</p> <p>Additional information, including Currency Code, Billable and Rate Code is displayed.</p> <p></p>
22.	<p>Click the Cost and Approval object.</p> <p>Approval Status is displayed.</p> <p></p>
23.	<p>Pending Exceptions (if applicable) are listed.</p> <p>Click the Pending Exceptions link.</p> <p></p>
24.	<p>Click the Return to Previous Page link.</p> <p></p>
25.	<p>Click the Summary Page link.</p> <p>Payable Time is summarized on this page.</p> <p></p>
26.	<p>Click the Return to Select Employee link.</p> <p></p>
27.	<p>Click the Home link.</p> <p></p>
28.	<p>End of Procedure.</p>



Manage Schedules

Manage Schedules
 Assign permanent work schedules, change schedules for a day, week, or range of dates.

[Assign Work Schedule](#)
[Manage Schedules](#)

Menu Path: *Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule*

Assign Work Schedule


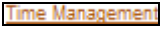
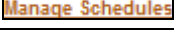
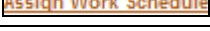
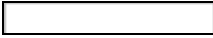
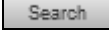
Employee ID 103659
 Employment Record 0











Assign Schedules Personalize | Find | View All | First 1-4 of 4 Last




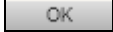






Effective Date	Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule
07/27/2014	Create Personal Schedule	MPLMN	10365900000	Adhoc schedule	Show Schedule
09/29/2014	Create Personal Schedule	MPLMN	10365900000	Adhoc schedule	Show Schedule
12/19/2010	Create Personal Schedule	MPLMN	10365900000	Adhoc schedule	Show Schedule
01/06/2008	Create Personal Schedule	MPLMN	10365900000	Adhoc schedule	Show Schedule




View history of Schedule Assignments, including default changes

Procedure


Step	Action
1.	Click the Manager Self Service object. 
2.	Click the Time Management link. 
3.	Click the Manage Schedules link. 
4.	Click the Assign Work Schedule link. 
5.	The Assign Work Schedules page displays. Employees can be selected via several Search Criteria . In this example, employees will be displayed by Department. Click in the Department field. 
6.	Enter the desired information into the Department field.
7.	Click the Search button. 




Step	Action
8.	<p>A list of employees is returned as search result. Selecting the Last Name column will sort employees alphabetically by Last Name.</p> <p>Click the Last Name column header.</p> 
9.	<p>Select an employee by Empl ID.</p> <p>Click the Empl Id link.</p> 
10.	<p>The Assign Work Schedule page appears for the selected employee. A new schedule can be added in the Assign Schedule section.</p> <p>Click the Add a new row ('+' sign) button.</p> 
11.	<p>A new work schedule is displayed in the Assign Schedules section. The Effective Date defaults to today's date. Modify the date by entering a different Effective Date or by using the Calendar function.</p> <p>Click the Choose a date (Alt+5) button.</p> 
12.	<p>Click the desired date.</p> 
13.	<p>Click the Create Schedule link.</p> 
14.	<p>Click the Schedule Shifts tab.</p> 
15.	<p>In the Shift Details section, select the magnifying glass for Shift ID.</p> <p>Click the Look up Shift ID button.</p> 
16.	<p>'OFF' is selected for days when an employee is not expected to be working (Saturday and Sunday, for example).</p> <p>Click the OFF link.</p> 
17.	<p>Click the Look up Shift ID button.</p> 

Step	Action
18.	Repeat the 'OFF' selection for the appropriate days. Click the OFF link. 
19.	Click the Time Reporting Elements object. 
20.	Click the Apply button. 
21.	Click the OK button. 
22.	Click the Save button. 
23.	The work schedule with the new assignment displays. At the top of the browser, select the Time Management link. Click the Time Management link. Time Management
24.	Click the Report Time menu. 
25.	Click the Timesheet menu. 
26.	The Timesheet Summary page displays. To search for an employee by department, click in the Department field under the Employee Selection Criteria section. Click in the Department field. <input type="text"/>
27.	Enter the desired Department .
28.	Click the Get Employees button. 
29.	A list of employees by department is displayed. In the Select an employee by Last Name in the Employees for <Manager> section. Click the <Last Name> link. 
30.	Click the Apply Schedule button. 

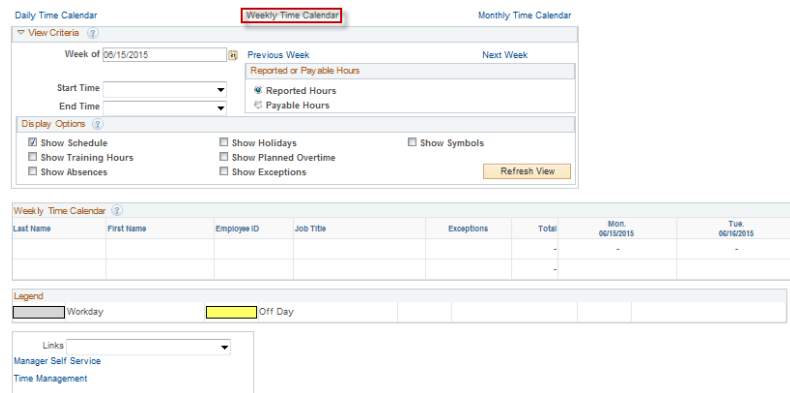
Step	Action
31.	<p>The schedule is applied for the calendar period specified.</p> <p>Click the Submit button.</p> 
32.	<p>The submission is confirmed.</p> <p>Click the OK button.</p> 
33.	<p>Click the Home link.</p> 
34.	<p>End of Procedure.</p>

Weekly Time Calendar







 **View Time**
 View calendars, balances, forecasted and payable time, accumulators and more.



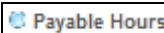



-  [Search -Absence Balance](#)
-  [Monthly Time Calendar](#)
-  [Weekly Time Calendar](#)

Menu Path: *Manager Self Service > Time Management > View Time > Weekly Time Calendar*







Procedure

Step	Action
1.	Click the Manager Self Service object. 
2.	Click the Time Management object. 
3.	Click the View Time object. 
4.	Click the Weekly Time Calendar menu. 
5.	Employee Selection Criteria can be entered to display the Monthly Time Calendar for an employee. In this example, an Employee ID is entered. Click in the Employee ID field. 
6.	Click in the Empl Record field. 
7.	Enter the desired information into the Empl Record field. Enter "0".

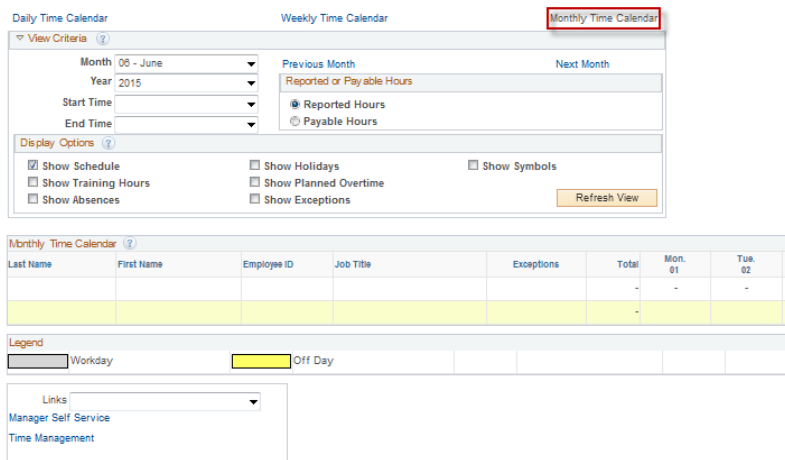
Step	Action
8.	Click the Get Employees button. 
9.	Reported Time is displayed for the week. Click the Next Week link. 
10.	Click the Payable Hours option. 
11.	Click the Refresh View button. 
12.	Reported time is displayed for the week.
13.	Click the Manager Self Service link. 
14.	Click the Home link. 
15.	End of Procedure.

Monthly Time Calendar





 **View Time**
 View calendars, balances, forecasted and payable time, accumulators and more.








-  Search -Absence Balance
-  **Monthly Time Calendar**
-  Weekly Time Calendar

Menu Path: *Manager Self Service > Time Management > View Time > Monthly Time Calendar*

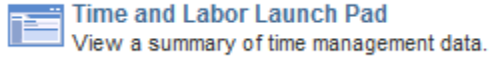


Procedure

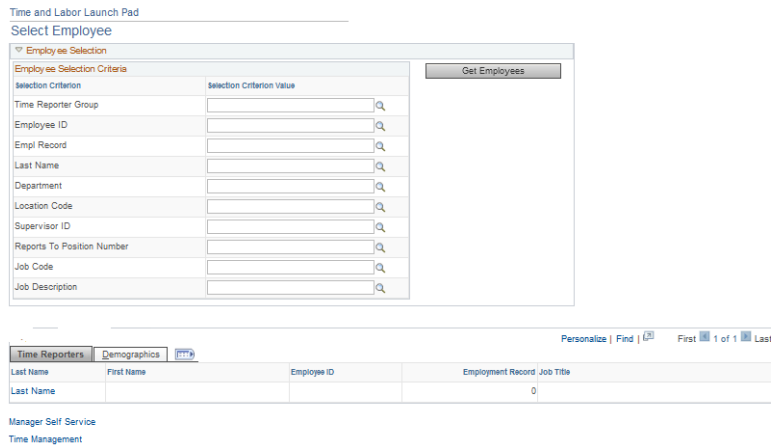
Step	Action
1.	Click the Manager Self Service object. 
2.	Click the Time Management object. 
3.	Click the View Time object. 
4.	Click the Monthly Time Calendar menu. 
5.	Employee Selection Criteria can be entered to display the Monthly Time Calendar for an employee. In this example, an Employee ID is entered. Click in the Employee ID field. <input type="text"/>
6.	Click in the Empl Record field. <input type="text"/>
7.	Enter the desired information into the Empl Record field. Enter "0".

Step	Action
8.	Click the Get Employees button. 
9.	Click the Payable Hours option. 
10.	Click the Refresh View button. 
11.	Payable Hours are displayed for the month. Use the scroll bar in the browser to see all Payable Hours displayed in the calendar.
12.	Click the Reported Hours option. 
13.	Click the Show Schedule option. 
14.	Click the Refresh View button. 
15.	Reported, Workday and Off Day Hours are displayed for the month. Use the scroll bar in the browser to see all time displayed in the calendar.
16.	Click the Manager Self Service link. 
17.	Click the Home link. 
18.	End of Procedure.

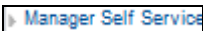


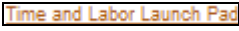


Time and Labor Launch Pad



Menu Path: *Manager Self Service > Time Management > View Time > Time and Labor Launch Pad*



Procedure

Step	Action
1.	Click the Manager Self Service link. 
2.	Click the Time Management link. 
3.	Click the View Time link. 
4.	Click the Time and Labor Launch Pad menu. 
5.	Employee Selection Criteria can be entered to display the Time and Labor Launch Pad, using Employee ID , Empl Record , Last Name , Department , etc. In this example, an Employee ID is entered. Click in the Employee ID field. 
6.	Enter an Employee ID into the Employee ID field.
7.	Click the Get Employees button. 

Step	Action
8.	<p>A list of a manager's employees is displayed towards the bottom of the page. Select an employee by clicking on the Last Name link.</p> <p>Click the <Last Name> link.</p> <p></p>
9.	<p>The Time and Labor Launch Pad page is displayed, showing a list of the employee's scheduled hours for the month.</p> <p></p>
10.	<p>In the drop-down list box, select the "Reported Hours" list item.</p> <p>Click the Reported Hours list item.</p> <p></p>
11.	<p>Click the View button.</p> <p></p>
12.	<p>Reported hours for the month are displayed.</p> <p>Click the Drop Down list.</p> <p></p>
13.	<p>Click the Payable Hours list item.</p> <p></p>
14.	<p>Click the View button.</p> <p></p>
15.	<p>Payable hours are displayed for the month selected.</p> <p>Click the Drop Down list.</p> <p></p>
16.	<p>Click the Scheduled Hours list item.</p> <p></p>
17.	<p>Click the View button.</p> <p></p>
18.	<p>Click the Manager Self Service link.</p> <p></p>
19.	<p>Click the Home link.</p> <p></p>
20.	<p>End of Procedure.</p>