University of Houston System

ORACLE

PEOPLESOFT

PeopleSoft Manager Self-Service Guide

University of Houston Clear Lake

UHV UNIVERSITY OF HOUSTON - VICTORIA

UHD University of Houston DOWNTOWN

Contents

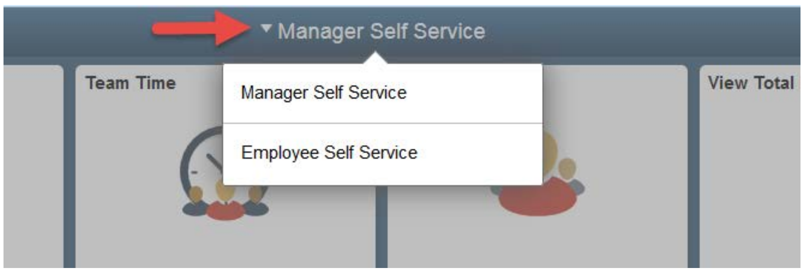
Accessing Manager Self-Service (MSS)

What's New?

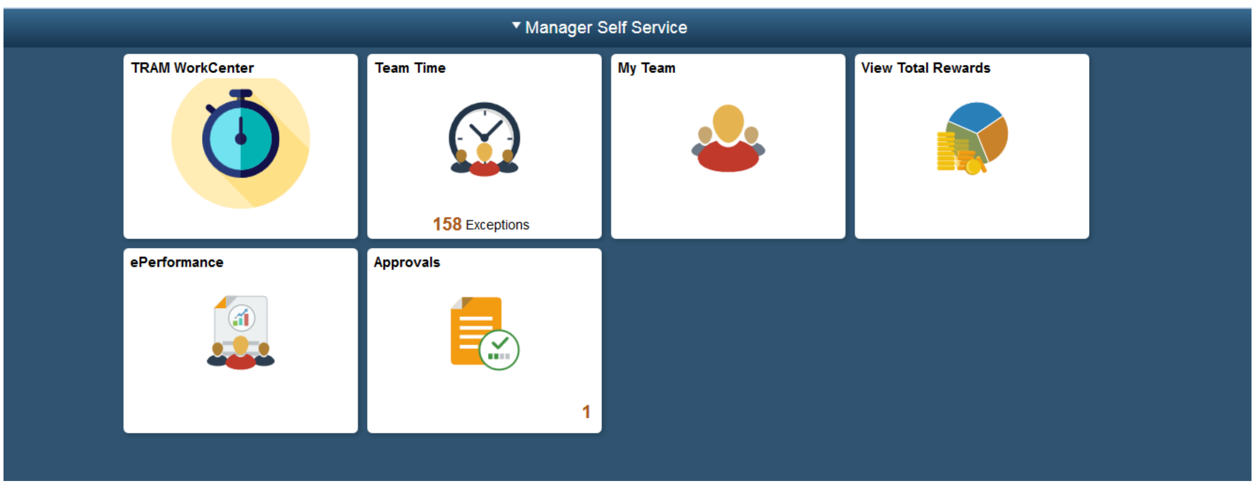
The University of Houston System is upgrading our PeopleSoft HR system with the latest technology released by Oracle. When you log in, you will see Employee and Manager Self-Service homepages with tiles. Each of the tiles is interactive, making it easy for you to access and navigate the system. Many of the existing functions have been upgraded to be mobile-friendly. (Many more are coming soon!) For example, employees can submit absence requests from their phones, and managers can approve from their phone (or any mobile device).

As a manager you have an Employee and Manager home page that provide quick access to pages through tiles relevant to those functions. When you log into PeopleSoft, you will see a drop-down menu in the center of the header. Select the arrow to change between Employee Self Service and Manager Self Service.

Instructions in this document are based on accessing the system via a laptop or desktop computer. Accessing the application through a mobile device may change the layout of the tiles and pages.



Your Manager Self-Service Tiles



The same icons you saw on Employee Self Service are on Manager Self Service as well. Here's a legend for the tools you see on the header, top right:

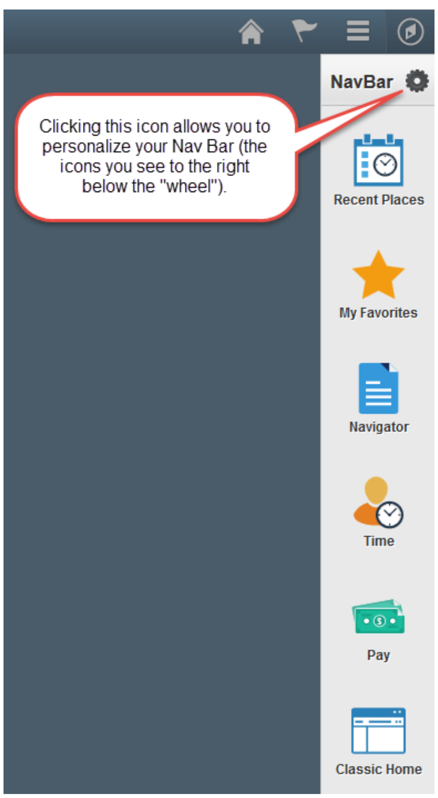
(***Home***) Tap to return to the main PeopleSoft Home page

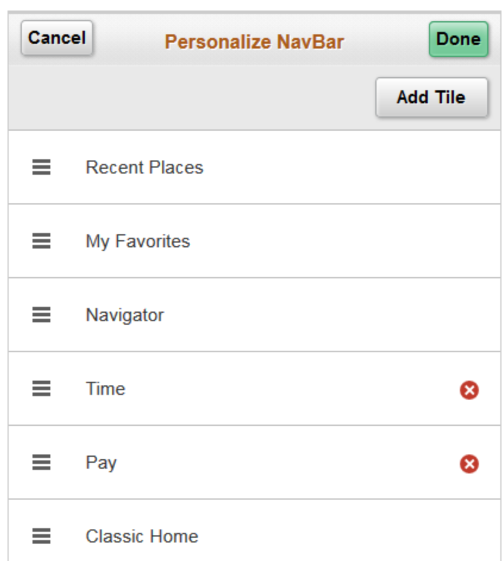
(***Notifications***) Tap to view actions and alerts in a notifications window

(***Actions List***) Frequently called "the hamburger," tap to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-appropriate personalization options.

(***Nav Bar***) Tap to use the Navigation Bar (Nav Bar). The Nav Bar provides handy navigation options such as Recent Places, My Favorites, Navigator (which expands to show the classic menu hierarchy), and Classic Home. Users can also add and remove fluid tiles from the Nav Bar using personalization options found here.

Navigation Bar





Recent Places

When you click this icon you will see the most recent places you have navigated.

My Favorites

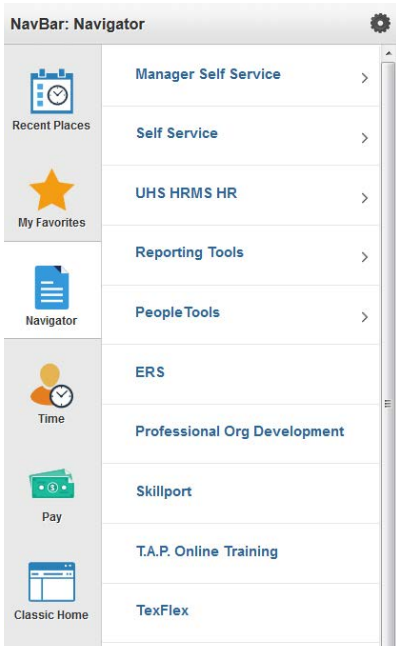
This configurable icon allows you to determine your favorites to display here. Favorites that you have saved prior to this update will be accessible here.

Classic Home

Clicking on this icon will take you to the “Classic” home, as used in prior versions of PS. If you run reports, work with eForms, or do other transaction tasks within PeopleSoft, you can use the Classic Home to navigate through the system.

Navigator

Clicking on this icon will present the main menu in a linear layout.

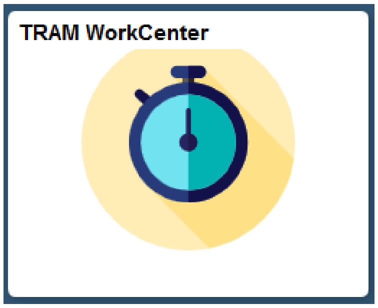


Tiles

Tiles found on the Employee Self Service home page can also be added to the NavBar for quick access.

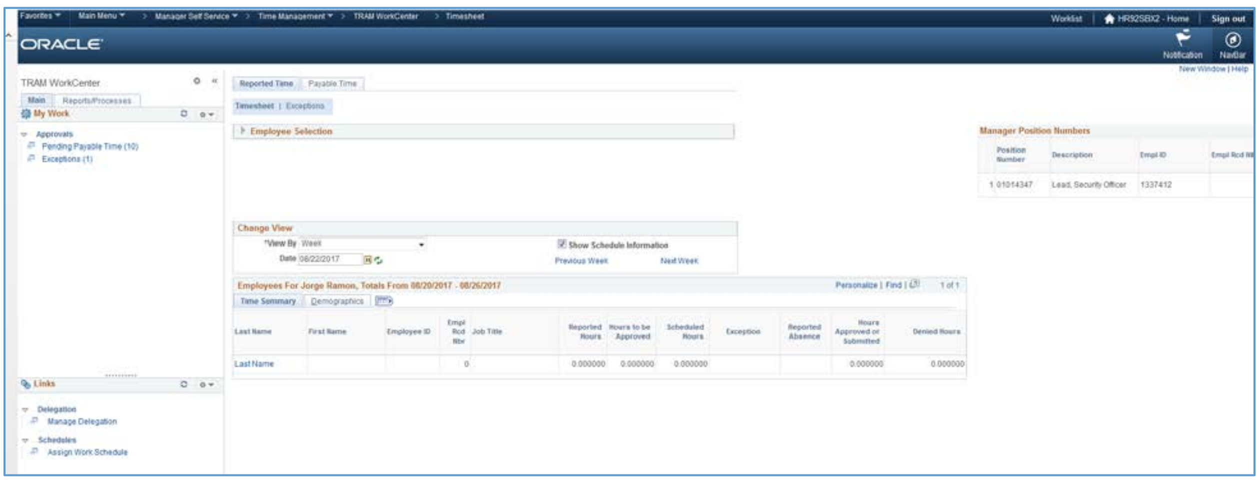
Now, let’s see what’s inside those tiles!

TRAM WorkCenter Tile



Contents of the TRAM WorkCenter Tile

You will find the same "classic" view of the TRAM WorkCenter as earlier versions of PeopleSoft. At this time, you will continue to approve Payable Time through the workcenter. PeopleSoft will deliver a mobile-friendly version of Payable Time soon. You can manage exceptions from the workcenter, or through the Team Time tile (shown later in this document).

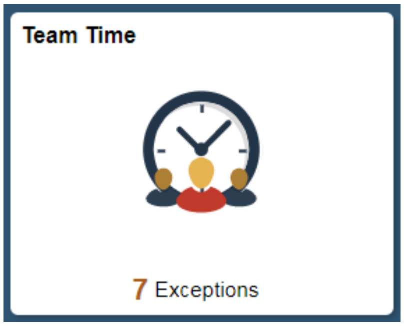


You will notice that the "Links" section on the bottom left no longer includes absence actions. These are now located in the Team Time Tile.

To return to the main menu, click the "Home" icon in the upper right-hand corner.

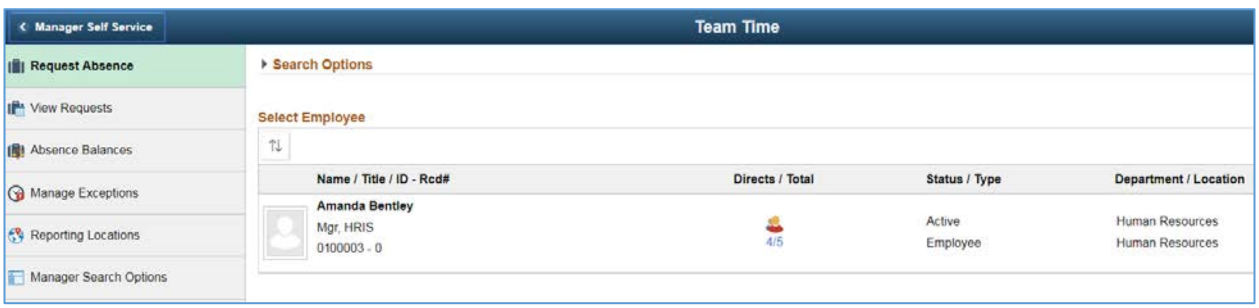
Team Time Tile

The Team Time tile allows you to view and submit absence requests for your employees. You can also view balances, manage exceptions and view time reporting location information.



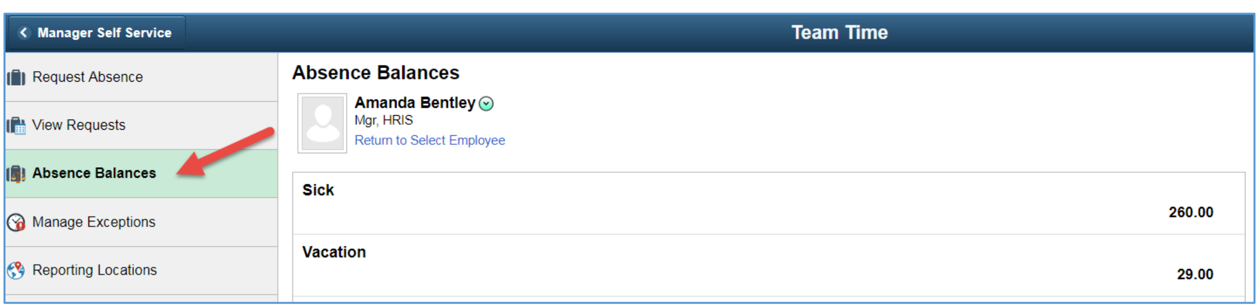
Contents of the Team Absences Tile

The task options display along the left navigation pane. A list of your direct reports displays in the main section. If your employees manage or supervise others, you can access the indirect reports by clicking on the hyperlink under the Directs/Total column.

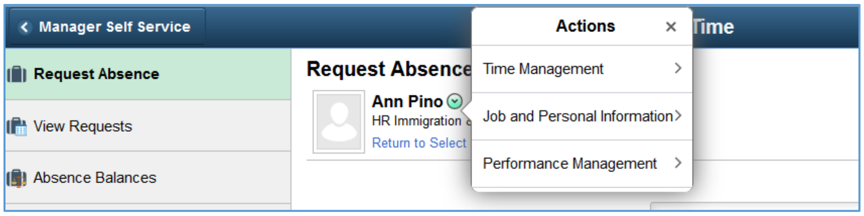


To start a task, select the appropriate action from the left navigation pane, then select the employee from your list.

For example, click Absence Balances, then select the employee.



You can access other actions for your employee by selecting the arrow next to their name.

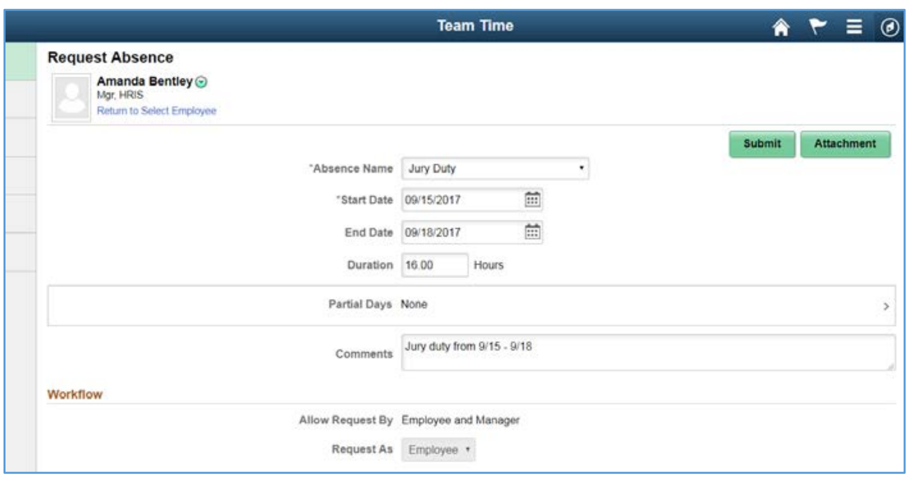


Absences

Managers can request and view absences, and balances, using the first three tasks in the Team Time tile. Select the task, then employee, and the system walks you through the steps.

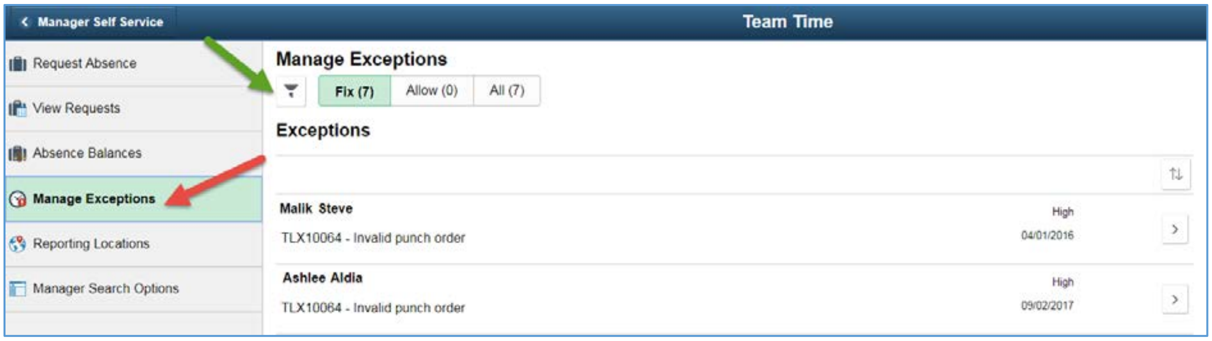
For example, select Request Absence, select the employee, then enter the absence information and click the Submit button. If you need to attach a document to the request, such as a Jury Summons, click the Save for Later button. Once saved, attach the document through the View Absences task.

Absences can be submitted, and approved, easily using mobile devices. Absences are approved through the Approvals tile, covered later in this document.



Managing Exceptions

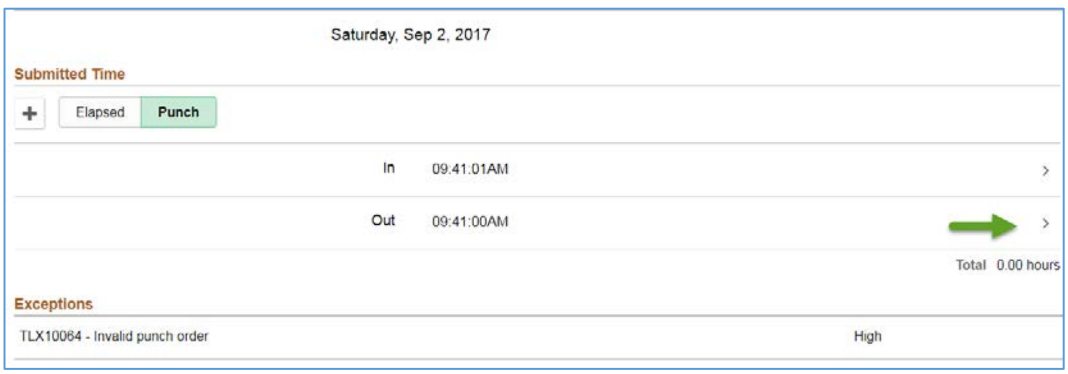
Exceptions can be managed through the TRAM Workcenter, or through the Team Time tile. To review and correct TRAM timesheet issues through Team Time, click the Manage Exceptions task.



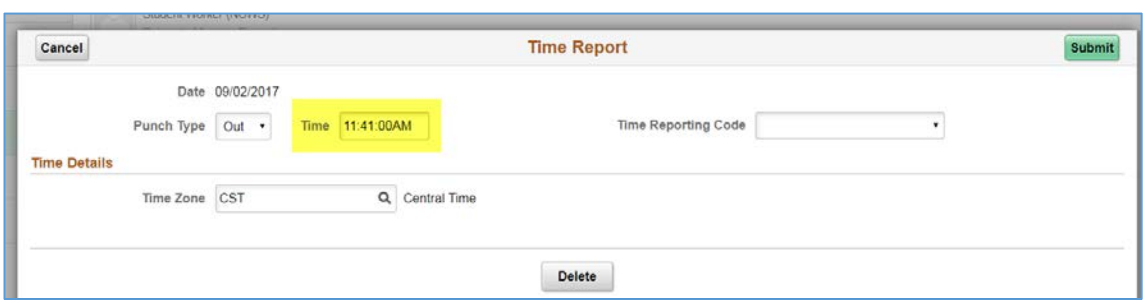
Use the Filter icon  to search for a specific employee or department.

To fix the exception, click the Go To Details  icon associated to the employee.

The employee's punch information for the exception date displays. You can edit the punch, or add a missed punch. To edit, click the arrow icon next to the punch type. To add a punch, click the (+) icon.



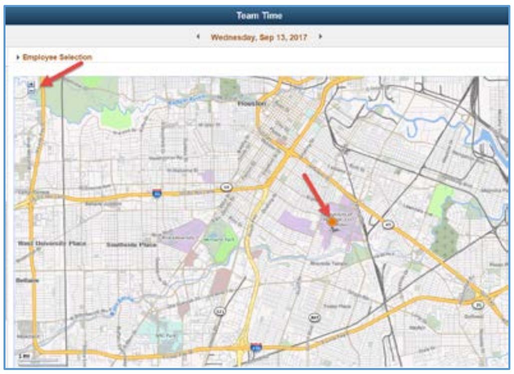
In this example, we will correct the Out punch for the employee and then click Submit. The timesheet is updated with the new punch time. When Time Administration runs, the exception will be cleared.



Reporting Locations

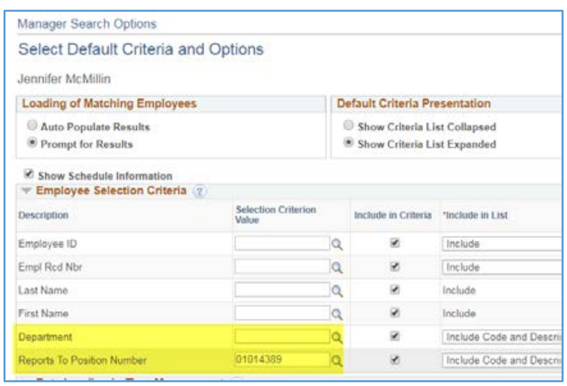
Managers can use the Reporting Locations page to view where the employee was at the time of the punch. Employees must have accepted the use of ‘location services’ on their computer or mobile device. (Employees are prompted to allow location/gps services at the time of the punch.)

Select the employee on the left side of the page, then the map will display with a push pin in the employee’s location. You can click on the push pin to see the punch type and times. Use the (+/-) tools on the upper left to zoom in/out of the map. The date defaults to today, but you can change the date in the page header.

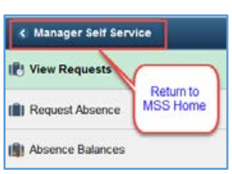


Manager Search Options

The Manager Search Options page allows you to setup preferences for viewing employees. If you have access to multiple departments within the organization, you may want to default your search options to your primary department, or only employees reporting to your position number. The search options defined here affect the Manage Exception counts in the Team Time tile.

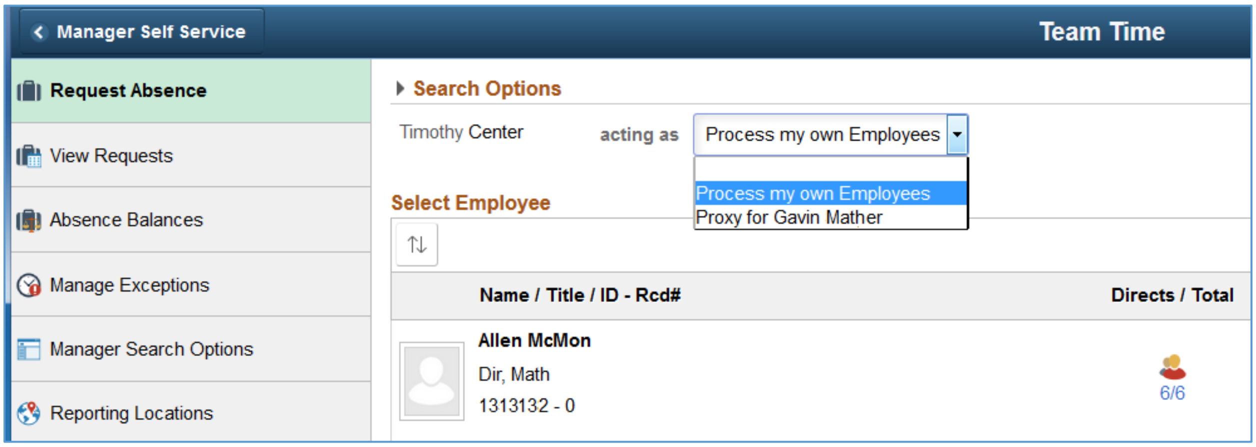


To return to the main homepage, click the Manager Self Service button.



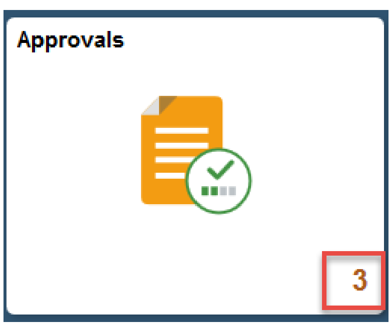
Delegations

If you are delegated to approve (or request) absences for someone else, you will use the Team Time Tile. When you access the absence tasks in the Team Time tile, a drop-down will display. Select whether you are processing requests for your direct reports, or acting as a proxy for someone else. If you select the proxy, the list of employees in the result grid will change. Reported and Payable time will be accessed through the TRAM workcenter.

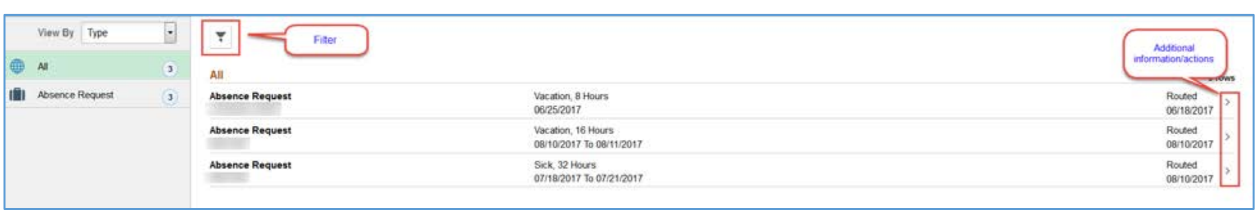


Approvals Tile

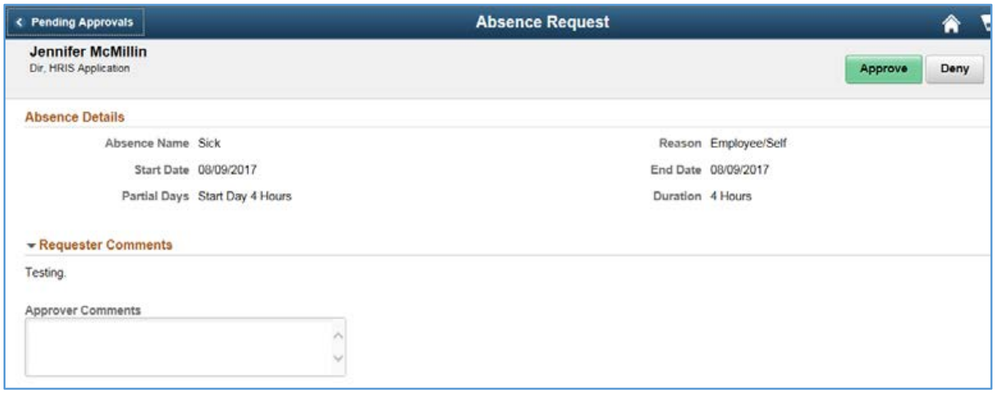
The Approvals tile provides access to items that require your approval, such as absence requests or delegations. You will notice that there is a number in the lower right-hand corner of the Approvals tile. This indicates that you have documents requiring your approval.



Contents of the Approvals Tile

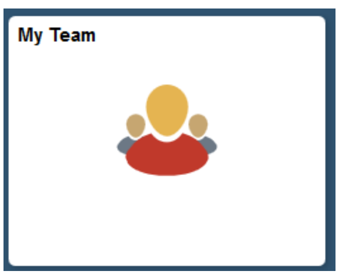


Select each transaction to view more information or take action on this approval item. If accessing an absence request, the system displays a page where managers can approve, or deny, the request. Once approved/denied, select the Pending Approvals button in the top left to return to the Approvals main page.



My Team Tile

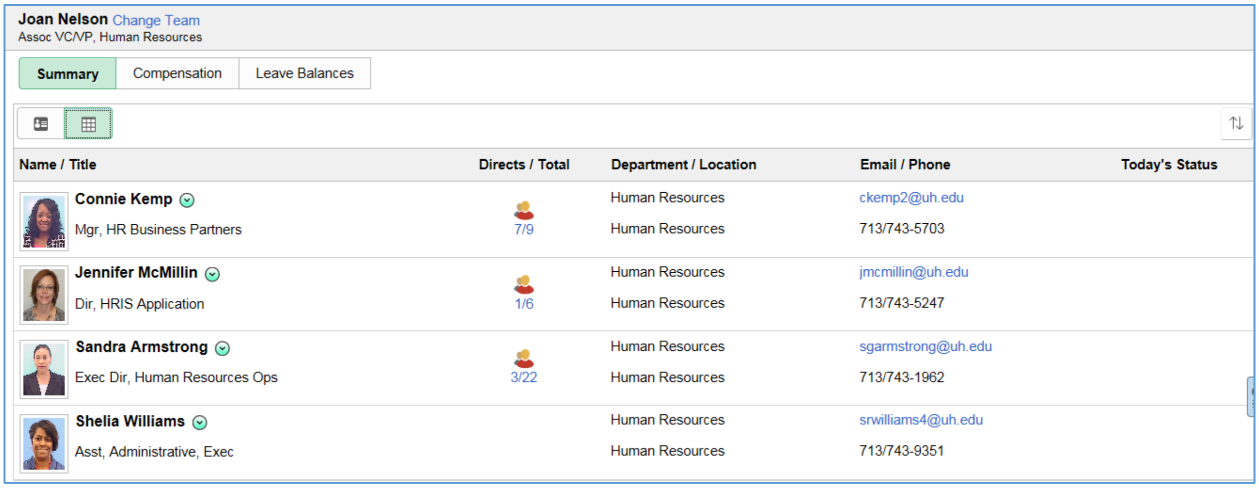
This tile allows you to view summary information for your direct and indirect reports. The information provided in this tile includes job data, contact info, leave balances, and compensation data.



Contents of the My Team Tile

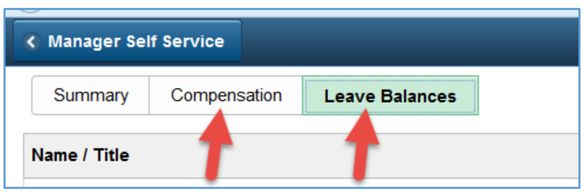
The My Team tile can be viewed either in a grid, or in a business card format. To change the format, click the icons circled below in red.

Grid view:

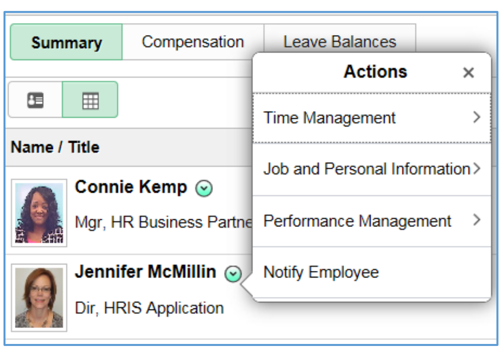


The Today's Status column will display an icon if an employee is off due to a planned absence or holiday. Access indirect reports by clicking the hyperlink in the Directs/Total column.

To view Compensation or Leave information, click the tabs at the top of the page.



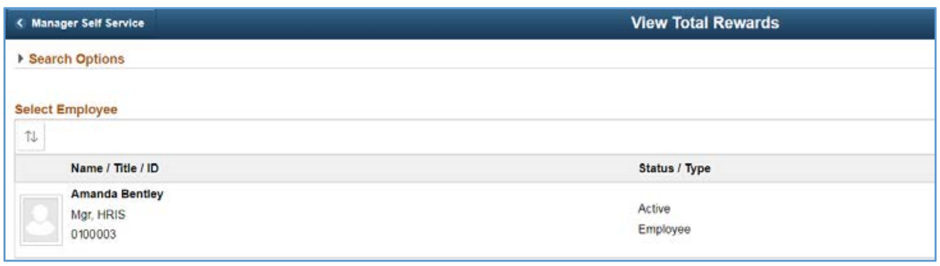
Remember, you can access other employee tasks by clicking the arrow next to the employee's name.



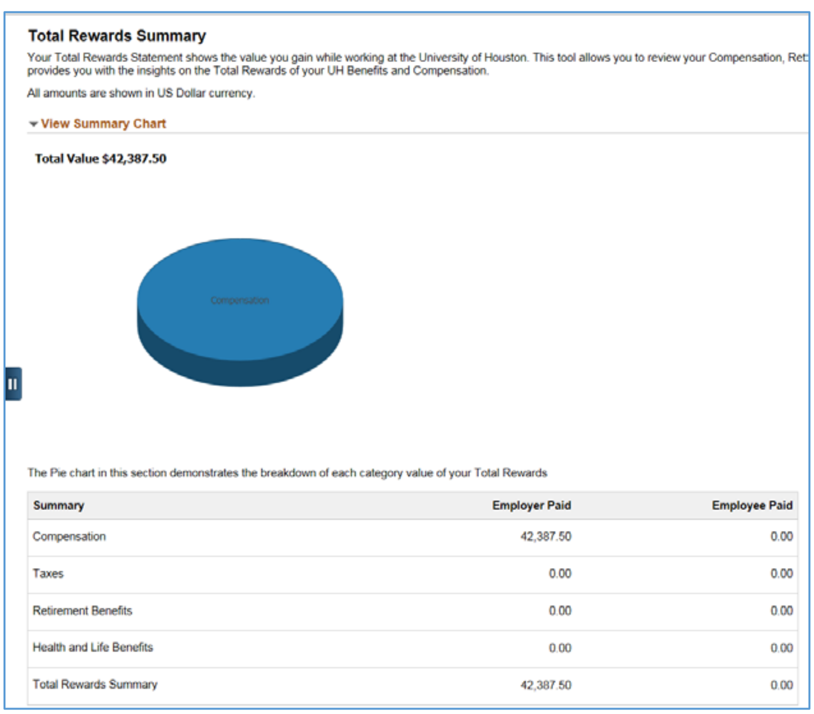
Total Rewards Tile

Your team members' Total Rewards statements are found in this tile. The reward statements will be updated each September for the prior fiscal year. The statements you see here are for fiscal year 2017, which is dated 9/1/16 – 8/31/17. Managers have access to view Compensation summaries for their employees, including all earn codes such as paid overtime, paid leave, longevity, holiday, etc. Excluded from the manager's view are taxes, retirement, and health and life coverage.

Contents of the Total Rewards Tile

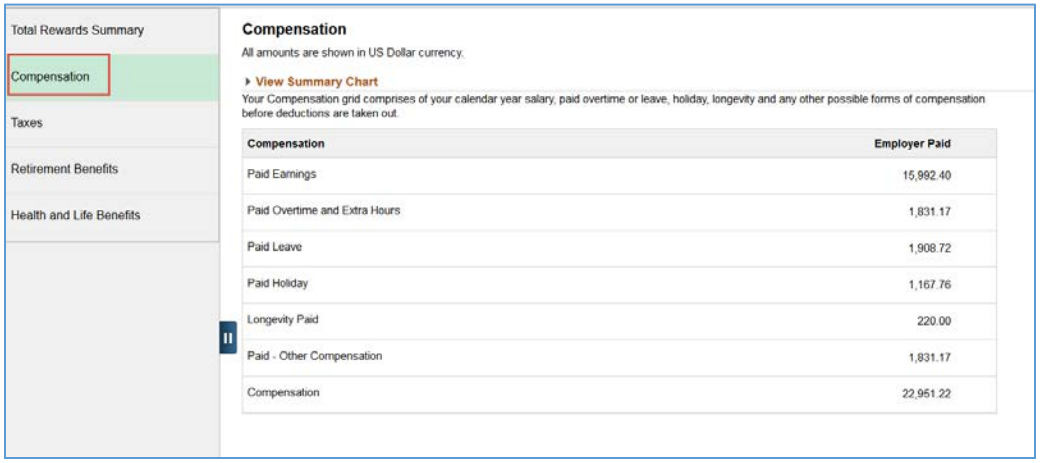


Select the employee you want to access. The system displays the Total Rewards summary. You can access compensation information only.



Summary	Employer Paid	Employee Paid
Compensation	42,387.50	0.00
Taxes	0.00	0.00
Retirement Benefits	0.00	0.00
Health and Life Benefits	0.00	0.00
Total Rewards Summary	42,387.50	0.00

To view the breakdown of the compensation, click the Compensation option on the left navigation pane.



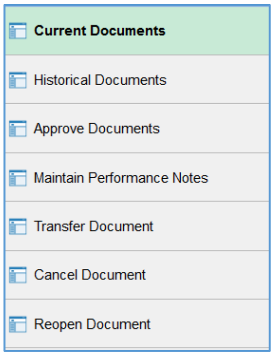
If you have questions regarding an employee's statement, please contact the Compensation Team.

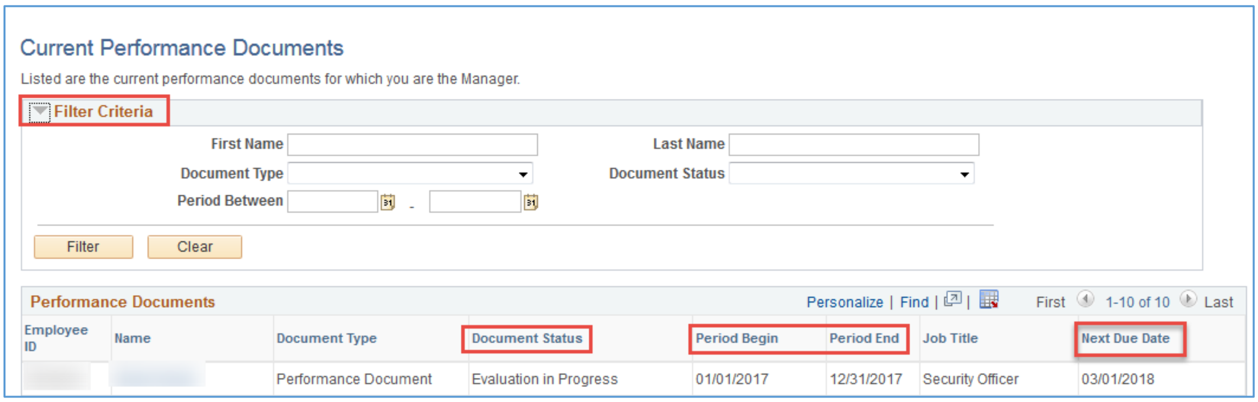
ePerformance Tile

You will find manager ePerformance tools for your team in this tile. ePerformance is used by the University of Houston campus only. Others will not see this tile.

Contents of the ePerformance Tile

Remember, all active performance documents are found under Current Documents. Prior year documents, or any document that has been fully approved and completed, will be found under Historical Documents. To access a document, select the employee's name. The ePerformance workcenter will display.

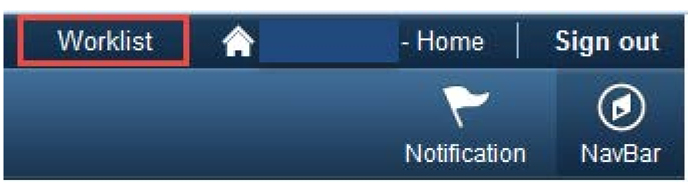




Worklist

Where's My Worklist?

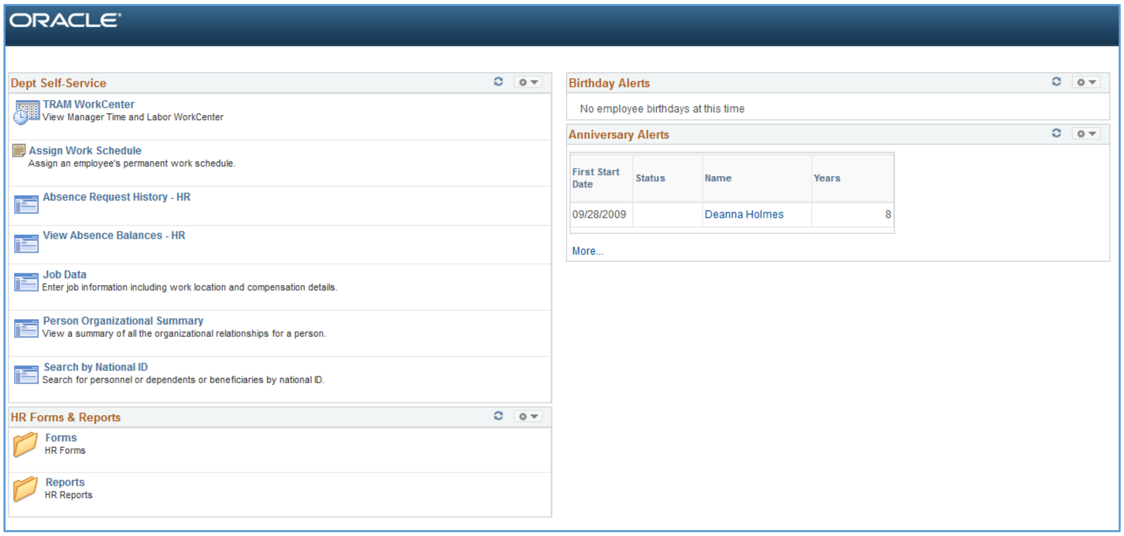
If you are an eForms approver, you will navigate to the Classic home page, where the link for the work list appears in the top right menu.



Alerts and eForms

Where are Alerts and eForms?

Birthday and Anniversary alerts are on the Classic home page. They will be added to the new tile functionality at a later date. Remember, to access the Classic Home, click the NavBar in the upper right corner.



Managers that participate in the eForms process or have responsibility to view and process data for employees other than their direct reports will find additional helpful links on the Dept Self-Service section of the classic home page.