

A banner with a blue and white abstract background featuring glowing circles and lines. The text is centered and reads:

**CAPPS HR/PAYROLL
End-User Training (EUT)**

**EUT Course - 111
MANAGER SELF SERVICE LITE**

PeopleSoft 9.2
July 2016



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Manager Self Service

Manager Self Service

Section 1 - Time and Leave Management

Section 1 - Time and Leave Management

Manager Timesheet Entry

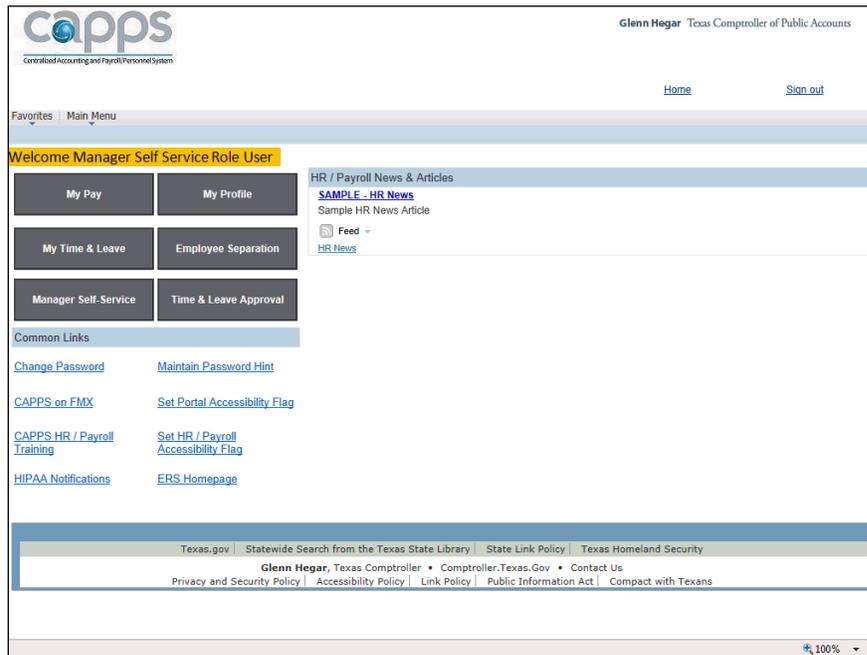
Section 1 - Lesson 1 Exercises - Manager Timesheet Entry

Procedure

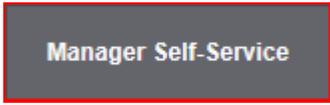
In this lesson you will learn how to enter time on behalf of your direct report. You will learn how to do the following:

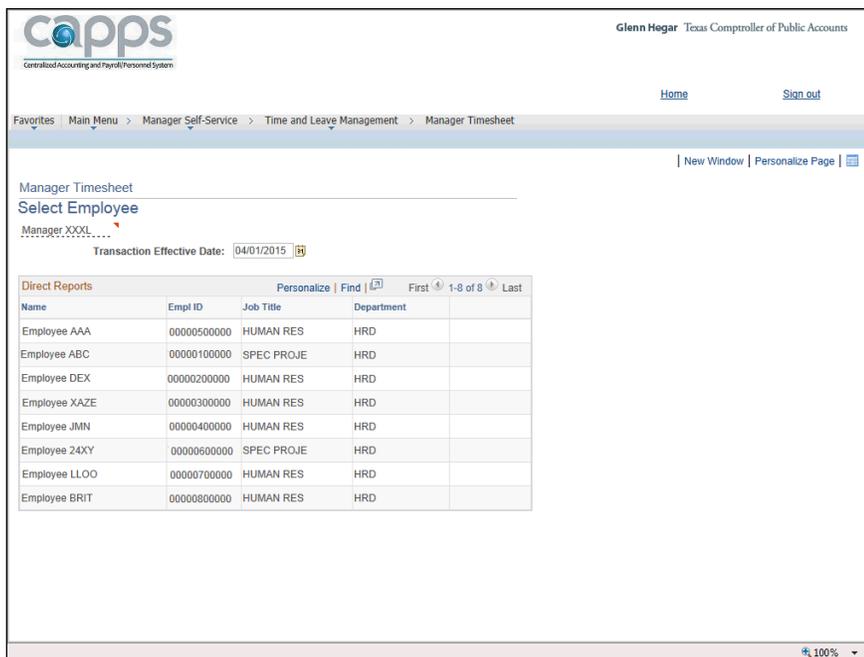
- 1. Enter Annual Leave**
- 2. Enter Sick Leave Taken**
- 3. Enter Time Worked on a Holiday with a Labor Account Code**
- 4. Certify Time on Behalf of Direct Report**

The timesheet lookup page will default to the first of the current month; all months will display 31 days regardless of the number of days in the month.



The screenshot shows the CAPPS Manager Self Service portal. At the top left is the CAPPS logo and the text 'Centralized Accounting and Payroll/Personnel System'. At the top right, it says 'Glenn Hegar Texas Comptroller of Public Accounts'. Below the logo, there are links for 'Home' and 'Sign out'. A navigation bar contains 'Favorites' and 'Main Menu'. A yellow banner reads 'Welcome Manager Self Service Role User'. The main content area features a grid of buttons: 'My Pay', 'My Profile', 'My Time & Leave', 'Employee Separation', 'Manager Self-Service', and 'Time & Leave Approval'. To the right of this grid is a section for 'HR / Payroll News & Articles' with a link to 'SAMPLE - HR News' and a 'Feed' dropdown. Below the grid is a 'Common Links' section with various utility links like 'Change Password', 'Maintain Password Hint', 'CAPPS on FMX', 'Set Portal Accessibility Flag', 'CAPPS HR / Payroll Training', 'Set HR / Payroll Accessibility Flag', 'HIPAA Notifications', and 'ERS Homepage'. The footer contains a list of links including 'Texas.gov', 'Statewide Search from the Texas State Library', 'State Link Policy', 'Texas Homeland Security', 'Glenn Hegar, Texas Comptroller', 'Comptroller.Texas.Gov', 'Contact Us', 'Privacy and Security Policy', 'Accessibility Policy', 'Link Policy', 'Public Information Act', and 'Compact with Texans'. A zoom level of 100% is shown in the bottom right corner.

Step	Action
1.	<p>Navigate to the Manager Timesheet.</p> <p>Click the Manager Self-Service button.</p> 
2.	<p>Click the Time and Leave Management link.</p> 
3.	<p>Click the Manager Timesheet link.</p> 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

New Window Personalize Page

Manager Timesheet

Select Employee

Manager XXXL

Transaction Effective Date: 04/01/2015

Name	Empl ID	Job Title	Department
Employee AAA	00000500000	HUMAN RES	HRD
Employee ABC	00000100000	SPEC PROJE	HRD
Employee DEX	00000200000	HUMAN RES	HRD
Employee XAZE	00000300000	HUMAN RES	HRD
Employee JMIN	00000400000	HUMAN RES	HRD
Employee 24XY	00000600000	SPEC PROJE	HRD
Employee LLOO	00000700000	HUMAN RES	HRD
Employee BRIT	00000800000	HUMAN RES	HRD

100%

Step	Action
4.	<p>Choose the Direct Report needing hours entered on the timesheet.</p> <p>Click the Employee DEX link.</p> 

Step	Action
5.	<p>Note: If there is an exception on a timesheet (an exception is an error occurring when time is processed), the system displays a moving banner across the top of the screen: "You have an exception." Both the employee and the manager will be locked out of the timesheet until the exception is resolved.</p> <p>Your agency Super User will check daily for exceptions, and will research the errors to clear them as quickly as possible, so that timesheet access can be restored.</p>
6.	<p>1. Your employee is taking Annual Leave.</p> <p>Click the Look up Time Reporting Code (Alt+5) button.</p> 
7.	<p>Find the Time Reporting Code for Annual Leave Taken (ANLVT).</p> <p>Click the ANLVT link.</p> 
8.	<p>The CAPPS HR/Payroll system uses decimals, and not minutes, for time reporting.</p> <p>15 minutes = .25 hours 30 minutes = .50 hours 45 minutes = .75 hours</p> <p>For example, if you work 7 1/2 hours, you would enter 7.50 hours on your timesheet, and not 7:30 (as in the old system).</p>
9.	<p>In this exercise, Employee DEX took 8 hours of Annual Leave on Thursday, April 2.</p> <p>Enter the desired information into the Thu 4/2 0.00 field. Enter "8.00".</p> 
10.	<p>If multiple Time Reporting Codes are required, each must be entered on a separate line.</p> <p>Click the Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015 button.</p> 
11.	<p>2. Your employee is also taking 4 hours of Sick Leave.</p> <p>Click the Look up Time Reporting Code (Alt+5) button.</p> 
12.	<p>Click the Vertical Scrollbar and scroll down this list to find the Time Reporting Code for Sick Leave Taken.</p>

CAPPS HR/PAYROLL

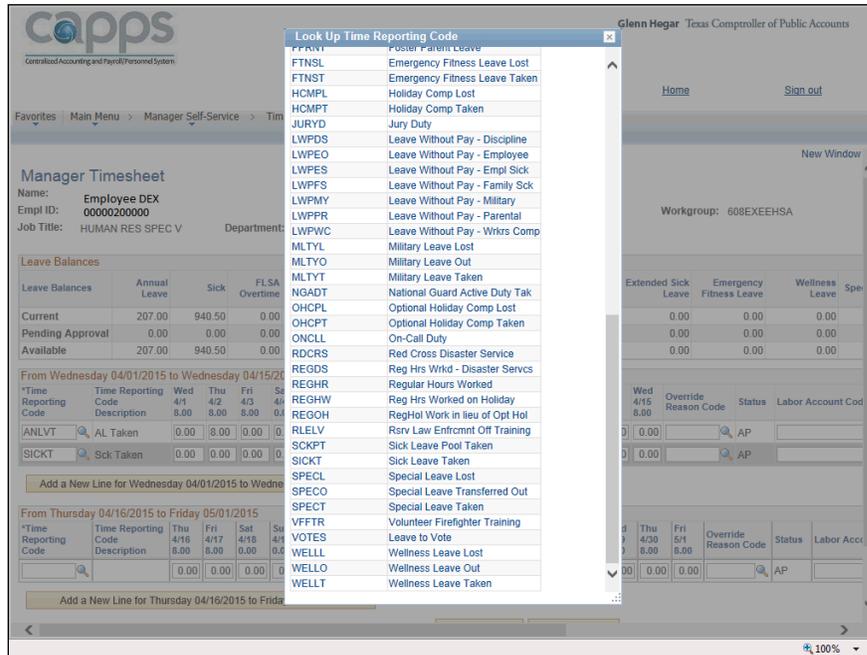
EUT Course



Step	Action
13.	Click the SICKT link. 
14.	The employee is taking 4 hours of Sick Leave on April 7. Enter the desired information into the Tue 4/7 0.00 field. Enter " 4.00 ". 
15.	3. Your employee worked 8 hours on April 21. He is working on a special project being tracked, so the hours need to be charged to a Labor Account Code . And because April 21 is a holiday, and the employee is scheduled to work, you will need to use the *Time Reporting Code for working on a holiday for which the employee is scheduled to work, REGHW. Click the Look up Time Reporting Code (Alt+5) button. 

The screenshot displays the CAPPS Manager Timesheet interface. A modal window titled "Look Up Time Reporting Code" is open, showing a search results list. The list includes codes and descriptions such as "12 NonExe Disaster Lost", "18 Exempt Disaster Taken", "ADMLL Administrative Leave Lost", and "REGHW". The background interface shows the "Manager Timesheet" for Employee DEX, with sections for "Leave Balances" and a grid for "Time Reporting" for dates from Wednesday 04/01/2015 to Friday 05/01/2015.

Step	Action
16.	Click the Vertical Scrollbar to scroll down the list to find the Time Reporting Code for regular time worked on a holiday.



Step	Action
17.	Click the REGHW link. REGHW
18.	Enter " 8.00 " into the Tue 4/21 0.00 field. <input type="text" value="0.00"/>

CAPPS HR/PAYROLL

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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

Manager Timesheet New Window

Name: Employee DEX State Service Effective Date: 07/11/1991
 Empl ID: 00000200000 0 Position Number: 00001132 Workgroup: 608EXEEHSA
 Job Title: HUMAN RES SPEC V Department: 240001 Manager ID: 000000009 Manager XXXL

Leave Balances

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spec
Current	207.00	940.50	0.00	0.00	16.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	207.00	940.50	0.00	0.00	16.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00

From Wednesday 04/01/2015 to Wednesday 04/15/2015

*Time Reporting Code	Time Reporting Description	Wed 4/1 8.00	Thu 4/2 8.00	Fri 4/3 8.00	Sat 4/4 0.00	Sun 4/5 0.00	Mon 4/6 8.00	Tue 4/7 8.00	Wed 4/8 8.00	Thu 4/9 8.00	Fri 4/10 8.00	Sat 4/11 0.00	Sun 4/12 0.00	Mon 4/13 8.00	Tue 4/14 8.00	Wed 4/15 8.00	Override Reason Code	Status	Labor Account Code
ANLVT	AL Taken	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP	
SICKT	Sck Taken	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP	

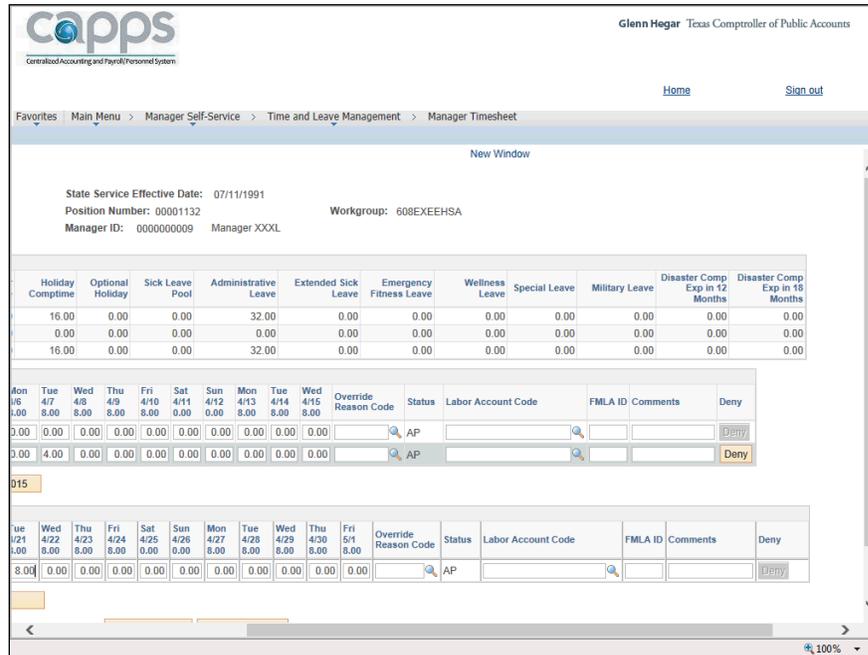
Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015

From Thursday 04/16/2015 to Friday 05/01/2015

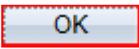
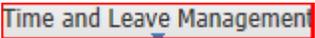
*Time Reporting Code	Time Reporting Description	Thu 4/16 8.00	Fri 4/17 8.00	Sat 4/18 0.00	Sun 4/19 0.00	Mon 4/20 8.00	Tue 4/21 8.00	Wed 4/22 8.00	Thu 4/23 8.00	Fri 4/24 8.00	Sat 4/25 0.00	Sun 4/26 0.00	Mon 4/27 8.00	Tue 4/28 8.00	Wed 4/29 8.00	Thu 4/30 8.00	Fri 5/1 8.00	Override Reason Code	Status	Labor Account Code
REGHW	REGHR Hol	0.00	0.00	0.00	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP	

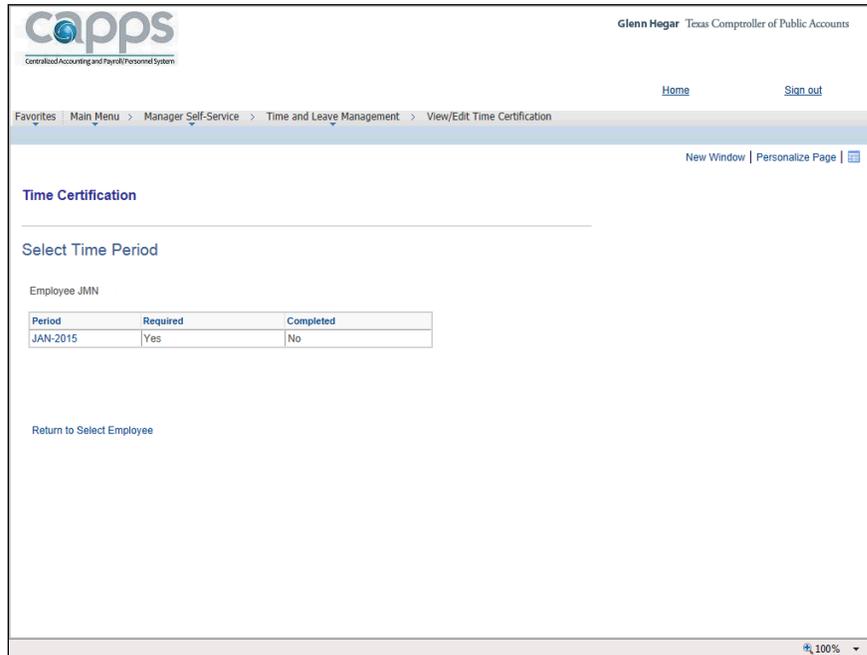
Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015

Step	Action
19.	To find the Labor Account Code field, click on the Horizontal Scrollbar to move to the right on this screen. 
20.	The Labor Account Code is used for allocating hours for special purposes.

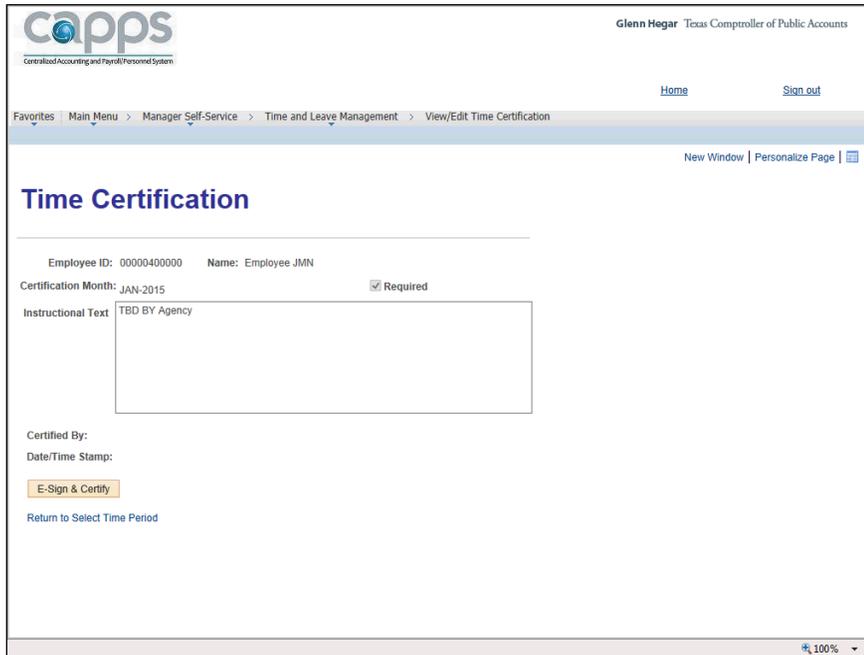


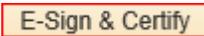
Step	Action
21.	<p>Find the Labor Account Code that is set up to track the employee's special project.</p> <p>Click the Look up Labor Account Code (Alt+5) button.</p> 
22.	<p>Choose the appropriate Labor Account Code for the activity. For this exercise, use 608_AB_T_OPERAT.</p> <p>Click the 608_AB_T_OPERAT link.</p> 
23.	<p>Click the Horizontal Scrollbar to scroll back to the left on this screen.</p>
24.	<p>When all appropriate hours have been entered for this employee, sign and approve the hours.</p> <p>Click the E-Sign & Approve button.</p> 

Step	Action
25.	<p>The system displays a Message that April 21 is a skeleton crew holiday.</p> <p>The Message is a reminder to make sure that the correct Time Reporting Codes for that date are being used.</p> <p>Click the OK button.</p> 
26.	<p>The system confirms that the Save was successful.</p> <p>Click the OK button.</p> 
27.	<p>There are other options relating to Holiday hours:</p> <p>Non-Scheduled Holiday: If a holiday falls on a day that the employee is not scheduled and the employee physically works the holiday, then the employee enters their hours worked with the REGHR TRC. This will result in the employee banking comp time for the hours worked. The employee will also earn COMPH in their Comp Time leave balance to account for holiday hours they are eligible for. This will allow them to take the hours for the holiday on another day (Holiday Bank).</p> <p>Work More Than The Authorized Hours: If an employee is authorized for 8 hours on a holiday, but is scheduled for 10 hours and physically works 10 hours, then the employee needs to enter 8 hours REGHW and 2 hours REGHR. If this same employee does not work on the holiday, then they need to enter 2 hours of Leave on the holiday, or CAPPS will automatically deduct available leave up to 2 hours or create an exception if 2 hours of leave is not available. (Note: The available leave must be from one leave type.)</p>
28.	<p>4. Certify time for a Direct Report.</p> <p>Click the Time and Leave Management button.</p> 
29.	<p>Click the View/Edit Time Certification menu.</p> 
30.	<p>The use of Time Certification will be determined by the agency.</p> <p>Click the Employee JMN link.</p> <p>Employee JMN</p>



Step	Action
31.	<p>Your employee has not certified her time for the January 2015 time period.</p> <p>Click the Period link.</p> <p>JAN-2015</p>



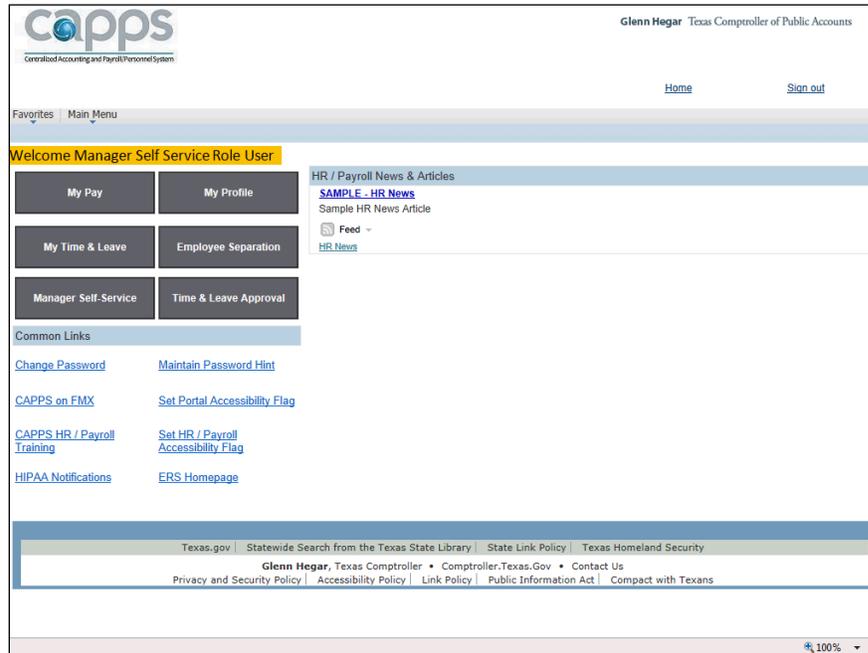
Step	Action
32.	<p>The system displays the Time Certification page.</p> <p>Note: Employees can certify their hours on their Timesheet.</p> <p>Click the E-Sign & Certify button.</p> 
33.	<p>The Save was successful.</p> <p>Click the OK button.</p> 
34.	<p>The employee's time for January has now been certified.</p> <p>If the time has been certified by the manager, then the manager's name will appear in the Certified By: field. The Date/Time Stamp: field shows when this certification was done.</p> <p>If the employee had certified the time, then the system would have displayed the employee's name.</p>
35.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

View Time

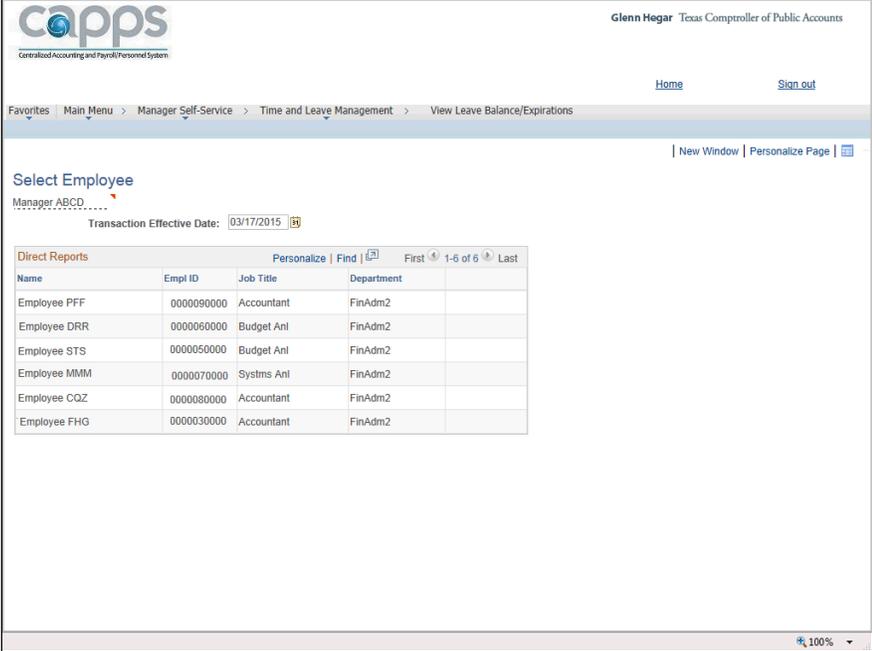
Section 1 - Lesson 2 Exercises - View Time

Procedure

This lesson shows how the Manager is able to view an employee's Leave Balance and Expiration.



Step	Action
1.	Navigate to the Manager Timesheet . Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. Time and Leave Management
3.	Click the View Leave Balance/Expirations link. View Leave Balance/Expirations



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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > View Leave Balance/Expirations

Select Employee

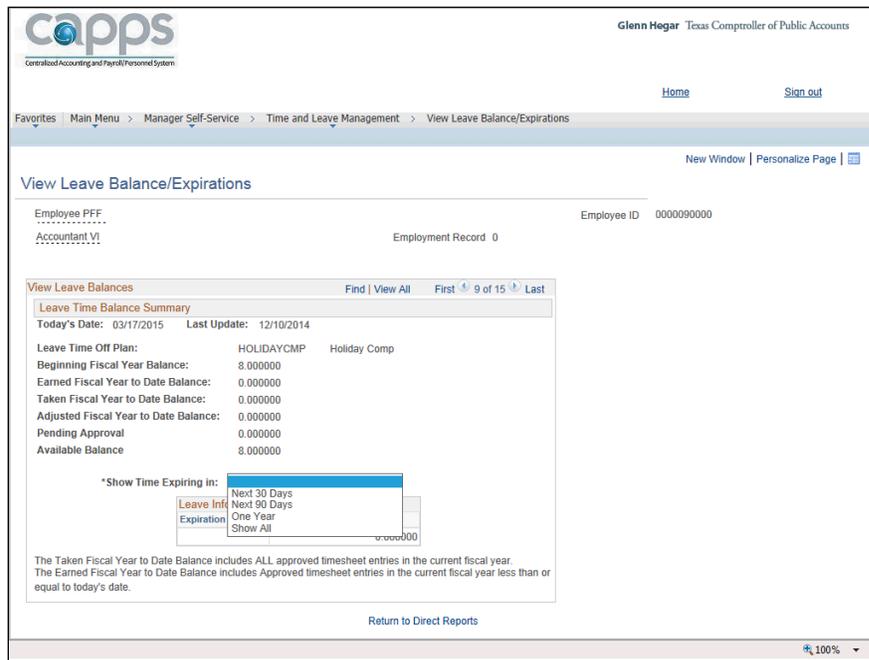
Manager: ABCD.....

Transaction Effective Date: 03/17/2015

Name	Empl ID	Job Title	Department
Employee PFF	0000090000	Accountant	FinAdm2
Employee DRR	0000060000	Budget Anl	FinAdm2
Employee STS	0000050000	Budget Anl	FinAdm2
Employee MMM	0000070000	Systems Anl	FinAdm2
Employee COZ	0000080000	Accountant	FinAdm2
Employee FHG	0000030000	Accountant	FinAdm2

Step	Action
4.	<p>Choose the employee whose leave you want to view.</p> <p>Click the Employee PFF link.</p> <p>Employee PFF</p>
5.	<p>The Leave Time Balance Summary displays all Comp Time plans, balances, earned hours, adjustments, hours taken, and expiring hours.</p> <p>Click the Show next row (Alt+.) button.</p> <p></p>
6.	<p>The employee has an Available Balance of 27.00 hours of Annual Leave.</p> <p>Click the Show next row (Alt+.) button.</p> <p></p>
7.	<p>Row 3 shows FLSA Overtime for this employee.</p> <p>Click the Show next row (Alt+.) button.</p> <p></p>

Step	Action
8.	<p>Row 4 shows Compensatory Time for this employee.</p> <p>Click the Show next row (Alt+.) button.</p> 
9.	<p>In this exercise, we have jumped ahead to Row 9, the Holiday Comp section.</p> <p>The employee has 8 hours of Holiday Comp time. The manager can see when this time will expire.</p> <p>Click the Show Time Expiring in list.</p> 



The screenshot shows the CAPPS interface for viewing leave balances. The page title is "View Leave Balance/Expirations". It displays employee information: Employee PFF, Accountant VI, Employment Record 0, and Employee ID 0000090000. The "Leave Time Balance Summary" section shows a "Leave Time Off Plan" of "HOLIDAYCMP" (Holiday Comp) with an "Available Balance" of 8.000000. Below this, a "Show Time Expiring in:" dropdown menu is open, showing options: "Next 30 Days", "Next 90 Days", "One Year", and "Show All". The "Show All" option is highlighted. A note at the bottom explains that the Taken Fiscal Year to Date Balance includes ALL approved timesheet entries in the current fiscal year, while the Earned Fiscal Year to Date Balance includes Approved timesheet entries in the current fiscal year less than or equal to today's date.

Step	Action
10.	<p>Your options include:</p> <p>Next 30 Days; Next 90 Days; One Year; or Show All.</p> <p>Click the Show All list item.</p> <p>Show All</p>

Step	Action
11.	The system shows that 8.00 hours of Holiday Comp time will expire on August 27, 2015.
12.	Congratulations! You have successfully completed this lesson. End of Procedure.

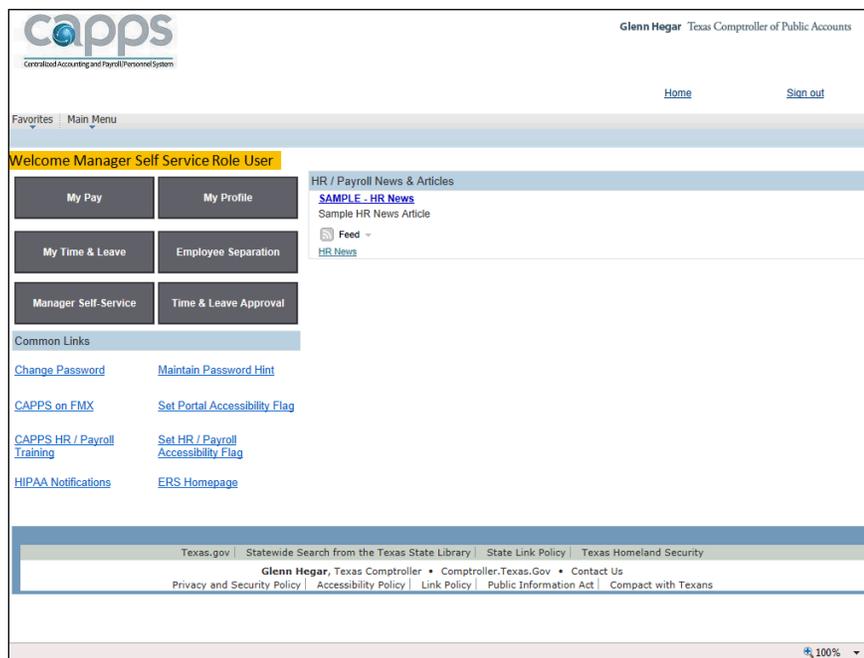
Maintain Shift Pay Rate

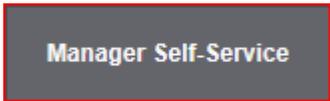
Section 1 - Lesson 3 Exercises - Maintain Shift Pay Rate

Procedure

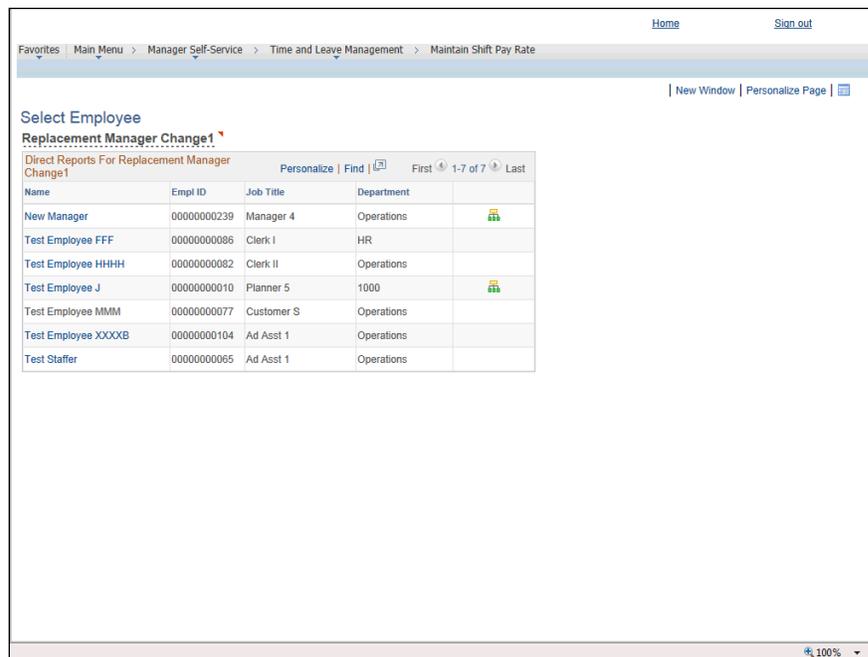
In order to receive regular shift pay, an agency must be authorized to pay shift, and an employee must be set up with the correct shift configuration in Job and Time & Labor.

On the **Maintain Shift Pay Rate** page, the manager can only change the shift rate.

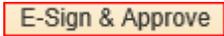


Step	Action
1.	Click the Manager Self-Service button. 

Step	Action
2.	Navigate to the Maintain Shift Pay Rate page. Click the Time and Leave Management link. Time and Leave Management
3.	Click the Maintain Shift Pay Rate link. Maintain Shift Pay Rate



Step	Action
4.	Choose the employee whose shift rate is going to change. Click the Test Staffer link. Test Staffer
5.	The system opens the Shift Pay Rate Change page, and displays the Current Status of the shift in one column, along with a Proposed Status in the other column.

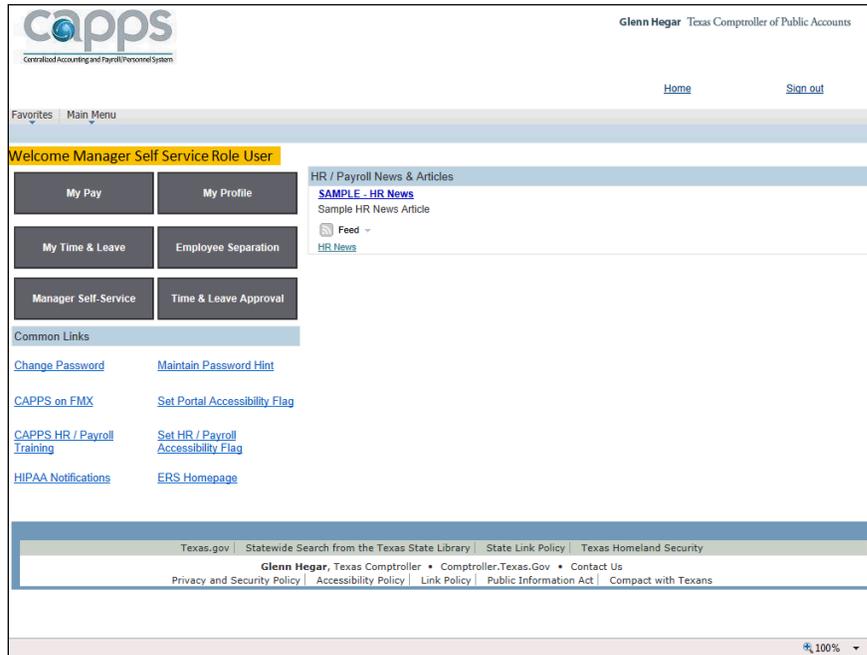
Step	Action
6.	<p>The employee currently receives a 1.0% shift rate; the proposed rate increase is to 1.5%.</p> <p>Enter "1.5" into the Regular Evening Shift(%) field.</p> 
7.	<p>The new rate (1.5%) has been entered in the shift rate field. To see the dollar amount of the change, tab out of the field.</p> <p>Press [Tab].</p>
8.	<p>The dollar amount of the Regular Evening Shift(%) has changed from \$23.50 to \$35.25.</p> <p>The Base Pay Plus Shift changed from \$2,373.50 to \$2,385.25.</p>
9.	<p>Click the E-Sign & Approve button.</p> 
10.	<p>The Save was successful.</p> <p>Click the OK button.</p> 
11.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

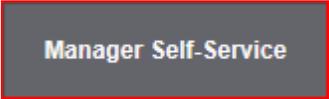
Leave Without Pay

Section 1 - Lesson 4 Exercises - Leave Without Pay

Procedure

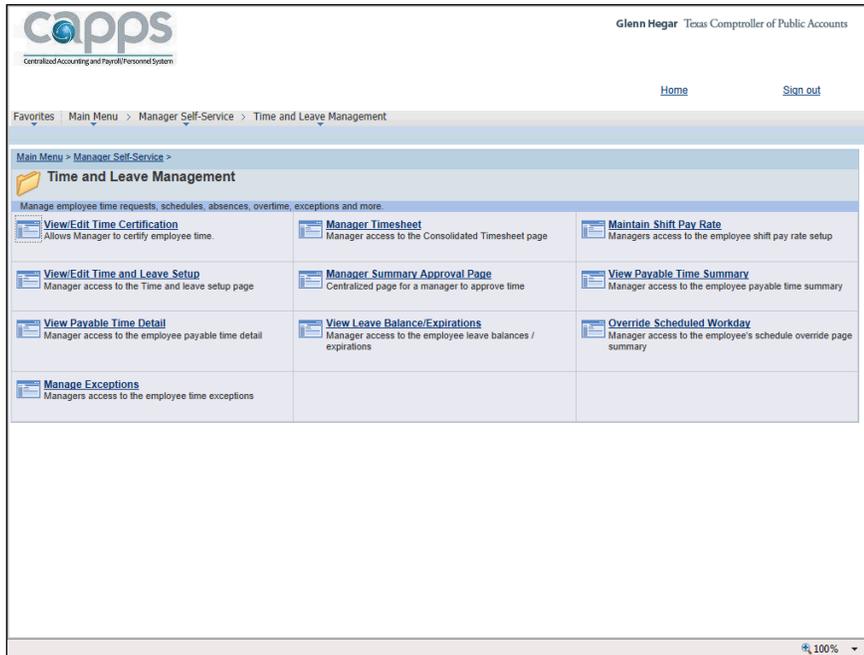
In this lesson, an employee will take one week of **Leave Without Pay** in April.



Step	Action
1.	<p>Navigate to the Manager Timesheet.</p> <p>Click the Manager Self-Service button.</p> 
2.	<p>Click the Time and Leave Management link.</p> <p><u>Time and Leave Management</u></p>

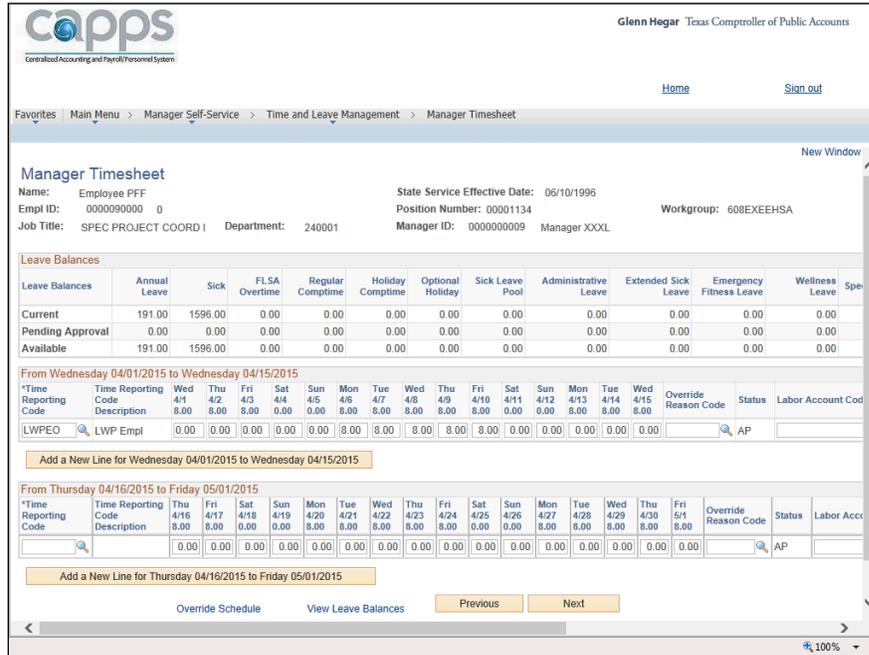
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Step	Action
3.	Click the Manager Timesheet link. Manager Timesheet
4.	Choose the employee taking Leave Without Pay . Click the Employee PFF link. Employee PFF
5.	Find the appropriate *Time Reporting Code for the leave. Click the Look up Time Reporting Code (Alt+5) button. 
6.	The employee is taking Leave Without Pay - Employee , thus you do <i>not</i> have to notify the FMLA administrator. Click the LWPEO link. LWPEO
7.	The employee will take 40 hours of Leave Without Pay during the work week April 6 to April 10. Enter the desired information into the Mon 4/6 0.00 field. Enter "8.00" . 0.00

Step	Action
8.	Enter the desired information into the Tue 4/7 0.00 field. Enter " 8.00 ". 
9.	Enter the desired information into the Wed 4/8 0.00 field. Enter " 8.00 ". 
10.	Enter the desired information into the Thu 4/9 0.00 field. Enter " 8.00 ". 
11.	Enter the desired information into the Fri 4/10 field. Enter " 8.00 ". 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

Manager Timesheet New Window

Name: Employee PFF State Service Effective Date: 06/10/1996
 Empl ID: 0000090000 0 Position Number: 00001134 Workgroup: 608EXEEHSA
 Job Title: SPEC PROJECT COORD I Department: 240001 Manager ID: 000000009 Manager XXXL

Leave Balances

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spe
Current	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Available	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

From Wednesday 04/01/2015 to Wednesday 04/15/2015

*Time Reporting Code	Time Reporting Description	Wed 4/1 8.00	Thu 4/2 8.00	Fri 4/3 8.00	Sat 4/4 0.00	Sun 4/5 0.00	Mon 4/6 8.00	Tue 4/7 8.00	Wed 4/8 8.00	Thu 4/9 8.00	Fri 4/10 8.00	Sat 4/11 0.00	Sun 4/12 0.00	Mon 4/13 8.00	Tue 4/14 8.00	Wed 4/15 8.00	Override Reason Code	Status	Labor Account Code
LWPEO	LWP Empl	0.00	0.00	0.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00			AP

Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015

From Thursday 04/16/2015 to Friday 05/01/2015

*Time Reporting Code	Time Reporting Description	Thu 4/16 8.00	Fri 4/17 8.00	Sat 4/18 0.00	Sun 4/19 0.00	Mon 4/20 8.00	Tue 4/21 8.00	Wed 4/22 8.00	Thu 4/23 8.00	Fri 4/24 8.00	Sat 4/25 0.00	Sun 4/26 0.00	Mon 4/27 8.00	Tue 4/28 8.00	Wed 4/29 8.00	Thu 4/30 8.00	Fri 5/1 8.00	Override Reason Code	Status	Labor Account Code
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			AP

Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015

Override Schedule View Leave Balances Previous Next

100%

Step	Action
12.	Click the Vertical Scrollbar to scroll down the page.

CAPPS HR/PAYROLL

EUT Course



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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

Name: Employee PFF State Service Effective Date: 06/10/1996
 Empl ID: 0000090000 0 Position Number: 00001134 Workgroup: 608EXEEHSA
 Job Title: SPEC PROJECT COORD I Department: 240001 Manager ID: 0000000009 Manager XXXL

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spe
Current	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

From Wednesday 04/01/2015 to Wednesday 04/15/2015

*Time Reporting Code	Time Reporting Description	Wed 4/1	Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9	Fri 4/10	Sat 4/11	Sun 4/12	Mon 4/13	Tue 4/14	Wed 4/15	Override Reason Code	Status	Labor Account Code
LWPEO	LWP Empl	0.00	0.00	0.00	0.00	0.00	0.00	8.00	8.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00		AP	

Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015

From Thursday 04/16/2015 to Friday 05/01/2015

*Time Reporting Code	Time Reporting Description	Thu 4/16	Fri 4/17	Sat 4/18	Sun 4/19	Mon 4/20	Tue 4/21	Wed 4/22	Thu 4/23	Fri 4/24	Sat 4/25	Sun 4/26	Mon 4/27	Tue 4/28	Wed 4/29	Thu 4/30	Fri 5/1	Override Reason Code	Status	Labor Account Code
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP	

Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015

Override Schedule View Leave Balances Previous Next

E-Sign & Approve Return to Direct Reports Maintain Leave of Absence Manager Summary Approval Page

Step	Action
13.	<p>When you click the E-Sign & Approve button, the employee's Leave Without Pay is approved.</p> <p>Click the E-Sign & Approve button.</p> <p>E-Sign & Approve</p>
14.	<p>The Save was successful.</p> <p>Click the OK button.</p> <p>OK</p>
15.	<p>Note: Longevity is not paid if an employee is on Leave Without Pay for the first scheduled day of the month.</p> <p>In this lesson, however, the employee worked on the first scheduled day of the month, and Longevity pay was <i>not</i> affected.</p>
16.	<p>Note: When LWOP is entered and approved on a Timesheet, the next available earnings will be docked.</p> <p>If LWOP is removed from a Timesheet, the next available earnings will be credited.</p>
17.	<p>Note: If LWOP is at least one calendar month, then the employee's service date is decreased by that amount of time.</p> <p>In this lesson, there is <i>no effect</i> on the employee's service date.</p>

Step	Action
18.	Congratulations! You have successfully completed this lesson. End of Procedure.

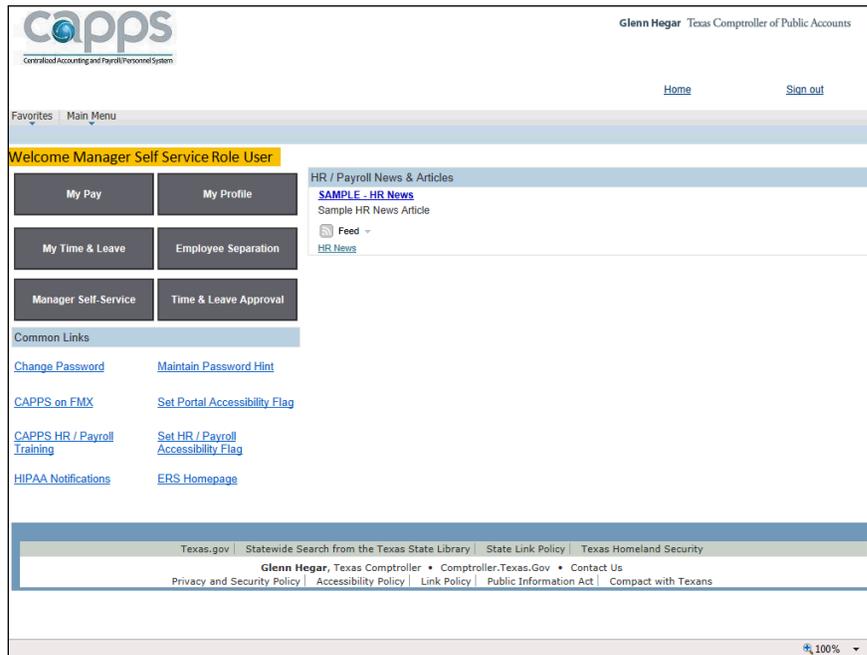
Employee Schedules

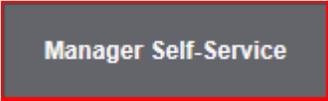
Section 1 - Lesson 5 Exercises - Employee Schedules

Procedure

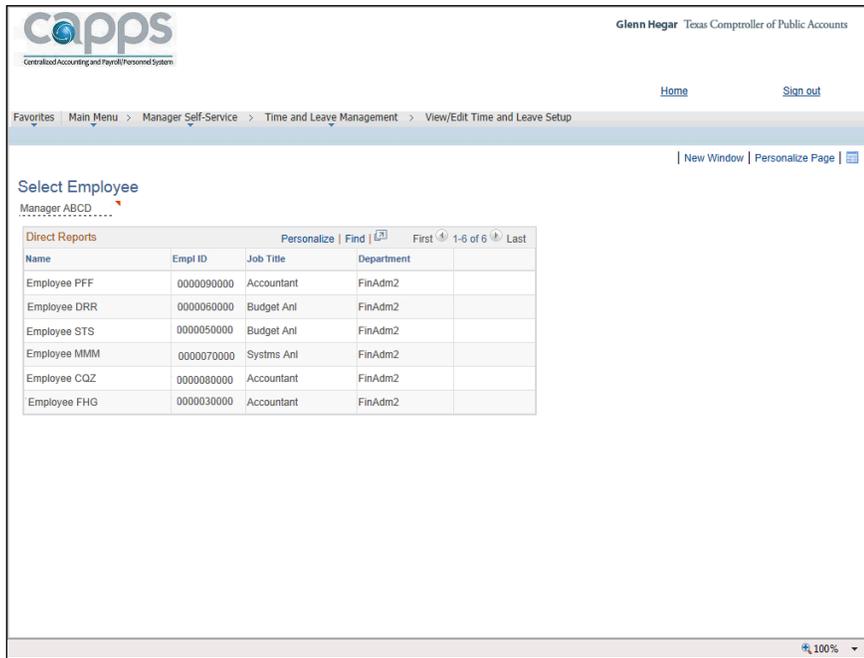
This lesson shows how a manager can:

1. Assign a new schedule for a future date, and
2. Override a schedule for the current week.



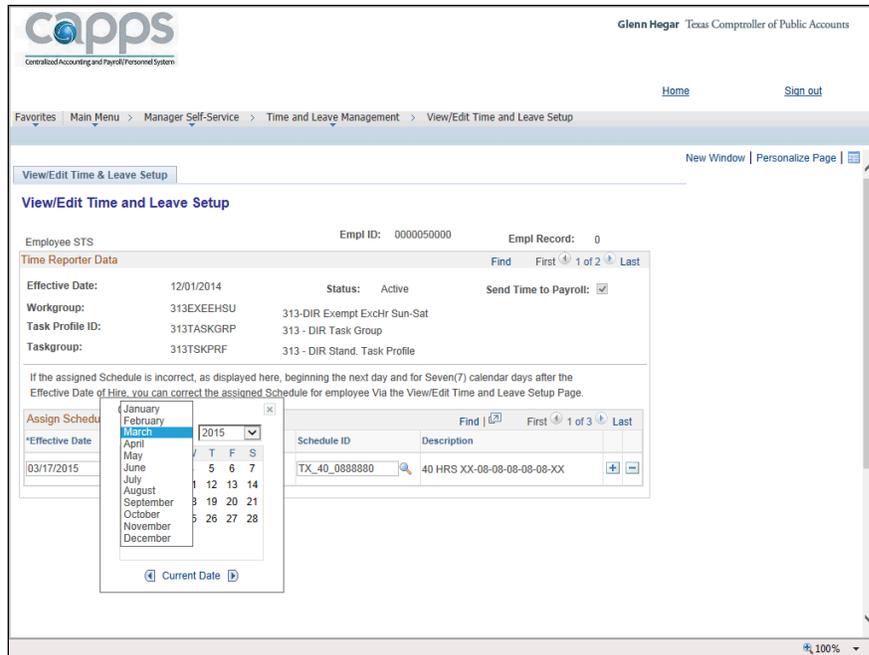
Step	Action
1.	Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. <u>Time and Leave Management</u>

Step	Action
3.	Click the View/Edit Time and Leave Setup link. View/Edit Time and Leave Setup



Step	Action
4.	Choose the employee whose schedule needs to be changed. Click the Employee STS link. Employee STS
5.	This chart shows you how to interpret a Schedule ID and Description . The Schedule ID Breakdown shows the Alpha Characters used in place of 2-digit numbers. For scheduling, the workweek begins on Sunday.
6.	The View/Edit Time and Leave Setup page provides an explanation on how to handle new hires. Notice that you have a limited time period (seven (7) calendar days after the Effective Date of Hire) in which to correct a new hire's Schedule.

Step	Action
7.	<p>1. Assign a new schedule for a future date.</p> <p>As the manager, you will be changing this employee's schedule.</p> <p>Click the Add a new Schedule (Alt+7) button.</p> 
8.	<p>In CAPPS HR/Payroll, all schedules start on a Sunday.</p> <p>The system will correctly interpret an employee's FLSA workweek for comptime/overtime calculations, even when it involves a Saturday or Sunday workday.</p> <p>Click the Choose a date (Alt+5) button.</p> 
9.	<p>Click the dropdown button to activate the menu.</p> 



The screenshot shows the 'View/Edit Time and Leave Setup' page in CAPPS. The page header includes the CAPPS logo and 'Glenn Hegar Texas Comptroller of Public Accounts'. The breadcrumb trail is: Favorites | Main Menu > Manager Self-Service > Time and Leave Management > View/Edit Time and Leave Setup. The page title is 'View/Edit Time and Leave Setup'. The employee information is: Employee STS: 0000050000, Empl ID: 0000050000, Empl Record: 0. The 'Time Reporter Data' section shows: Effective Date: 12/01/2014, Status: Active, Send Time to Payroll: [checked]. Workgroup: 313EXEHSU, 313-DIR Exempt ExChr Sun-Sat. Task Profile ID: 313TASKGRP, 313 - DIR Task Group. Taskgroup: 313TSKPRF, 313 - DIR Stand. Task Profile. A warning message states: 'If the assigned Schedule is incorrect, as displayed here, beginning the next day and for Seven(7) calendar days after the Effective Date of Hire, you can correct the assigned Schedule for employee Via the View/Edit Time and Leave Setup Page.' The 'Assign Schedule' dropdown menu is open, showing a calendar for 2015 with 'April' selected. The 'Schedule ID' table shows: TX_40_0888880, 40 HRS XX-08-08-08-08-XX.

Step	Action
10.	<p>Click the April list item.</p> <p>April</p>

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Centralized Accounting and Payroll/Personnel System

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Favorites | Main Menu > Manager Self-Service > Time and Leave Management > View/Edit Time and Leave Setup

New Window | Personalize Page

View/Edit Time & Leave Setup

View/Edit Time and Leave Setup

Employee STS Empl ID: 0000050000 Empl Record: 0

Time Reporter Data Find First 1 of 2 Last

Effective Date: 12/01/2014 Status: Active Send Time to Payroll:

Workgroup: 313EXEEHSU 313-DIR Exempt ExchHr Sun-Sat

Task Profile ID: 313TASKGRP 313 - DIR Task Group

Taskgroup: 313TSKPRF 313 - DIR Stand. Task Profile

If the assigned Schedule is incorrect, as displayed here, beginning the next day and for Seven(7) calendar days after the Effective Date of Hire, you can correct the assigned Schedule for employee Via the View/Edit Time and Leave Setup Page.

Assign Schedule Calendar Find | 1 of 3 Last

*Effective Date: 03/17/2015

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Current Date

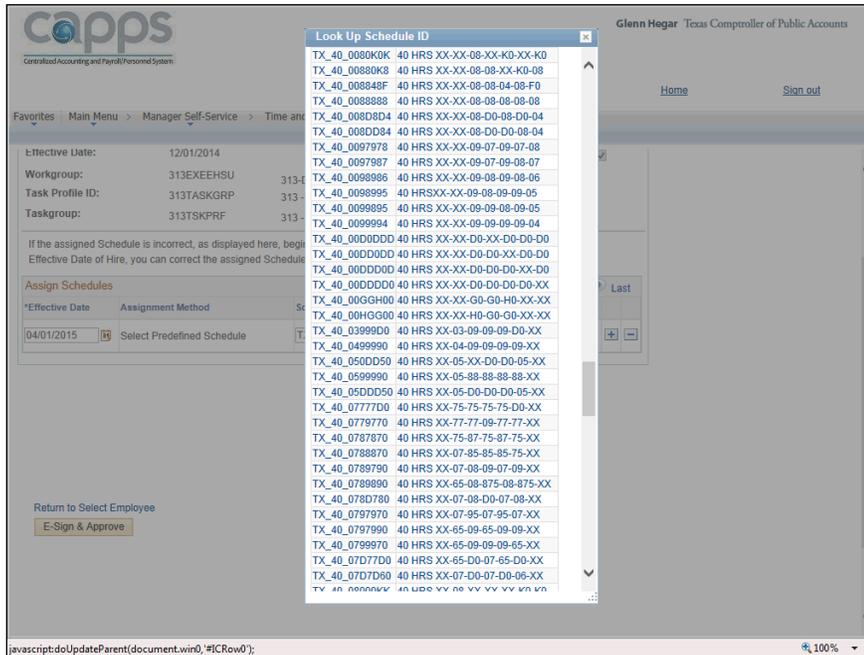
Schedule ID	Description
TX_40_0888880	40 HRS XX-08-08-08-08-XX

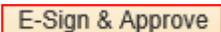
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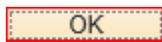
Step	Action
11.	Click the 5 link.

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Step	Action
14.	Click the 40 HRS XX-07-95-07-95-07-XX link. 
15.	Click the E-Sign & Approve button. 
16.	The system has successfully saved the new schedule for this employee. Click the OK button. 
17.	Click the Time and Leave Management menu. 
18.	2. Override the schedule for the current week. Click the Override Scheduled Workday menu. 

Step	Action
19.	<p>In this example, Employee DRR will work on Saturday, and take Monday off. This change is only for the current week, and the change can be made on the Override Scheduled Workday page.</p> <p>Click the Look up Saturday 03/21/2015 (Alt+5) button.</p> 
20.	<p>The hours are listed in 1/4 hour increments.</p> <p>The employee will work 8 hours on Saturday for this week only.</p> <p>Click the 8 link.</p> 
21.	<p>The employee will not work on Monday, for this week only.</p> <p>Delete Monday's hours.</p> <p>Press [Delete].</p>
22.	<p>Enter 0.00 hours in Monday's field.</p> <p>Enter the desired information into the Monday 03/16/2015 field. Enter "0.00".</p>
23.	<p>The employee's hours for the week = 40.00.</p> <p>Note: The approval on this page is for the change in schedule for this week only. You are not approving hours worked, you are approving hours scheduled.</p> <p>Click the E-Sign & Approve button.</p> 
24.	<p>Click the OK button.</p> 
25.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Manager Approvals

Section 1 - Lesson 6 Exercises - Manager Approvals

Procedure

Hours entered and submitted by employees need approval from a manager.

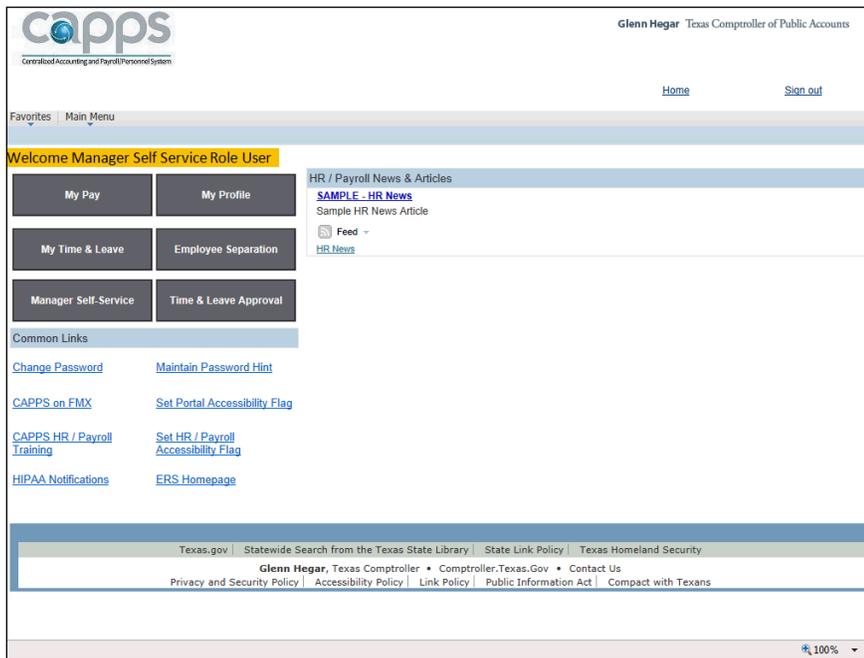
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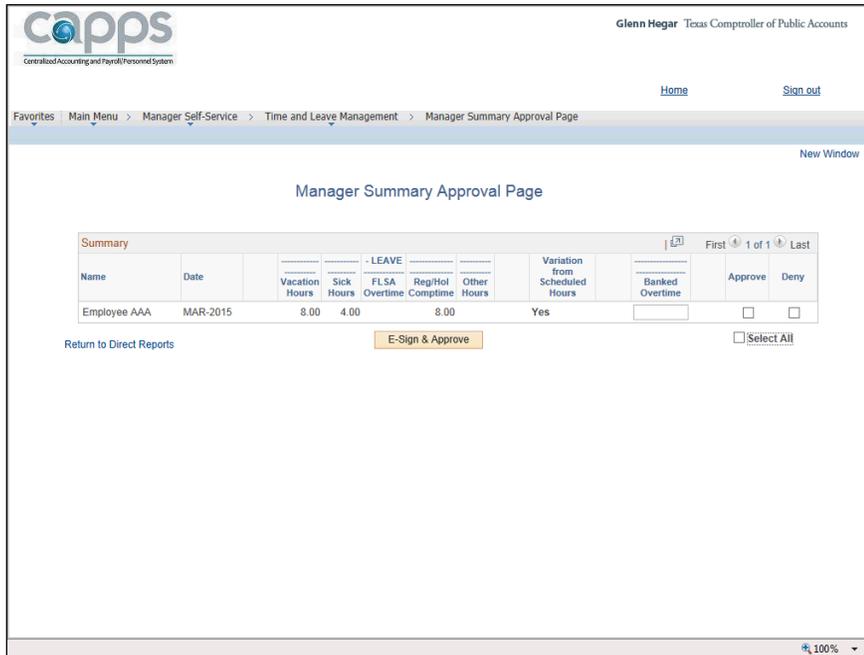
A manager can approve hours on the **Manager Summary Approval** page or the **Manager Timesheet**.

Hours entered by a manager on an employee's **Timesheet** are approved when the manager clicks on the **E-Sign and Approve** button.



Step	Action
1.	Navigate to the Manager Summary Approval page. Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. 
3.	Click the Manager Summary Approval Page link. 

Step	Action
4.	<p>The system opens the Manager Summary Approval Page.</p> <p>Note: Your agency may use this page for approvals, or it may use this page as a view only page.</p> <p>View only access means that the Approve and Deny boxes will be grayed out. If that is the case, the manager must then go to the Timesheet - using the employee name link - in order to approve or deny the hours.</p>
5.	<p>In this example, the manager has one employee with hours that need approval.</p> <p>A manager can use the Manager Summary Approval page to see which employees need hours approved. In addition, a reminder process has been created to notify managers that they have hours to approve. Those hours are in an NA (Needs Approval) status.</p> <p>Ten (10) days after the create date, if the hours are still in an NA status, an email is auto-generated and sent to the manager. After 17 days (if the hours are still in an NA status), another email is auto-generated and sent to the next level manager.</p>
6.	<p>For those agencies who choose to use the Manager Summary Approval page for approvals (in other words, this page is not view only), a manager can approve or deny hours for an employee for the entire month.</p>
7.	<p>On the Timesheet, the manager can deny hours by row.</p> <p>There might be multiple days with hours on a row with Needs Approval status, but if Deny is checked, the system denies everything on that row still in an NA status.</p> <p>When the manager clicks the E-Sign & Approve button, the system will automatically approve all hours in an NA status for the month currently being viewed.</p>



Step	Action
8.	In this example, the manager has chosen to approve the hours. Click the Approve option. <input type="checkbox"/>
9.	Note: We recommend that you view an employee's Timesheet before approving his time. Click the E-Sign & Approve button. <input type="button" value="E-Sign & Approve"/>
10.	Click the OK button. <input type="button" value="OK"/>
11.	The employee's hours have been approved; the system shows no employees needing hours approved on the Manager Summary Approval Page .
12.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 2 - Reporting

Section 2 - Reporting

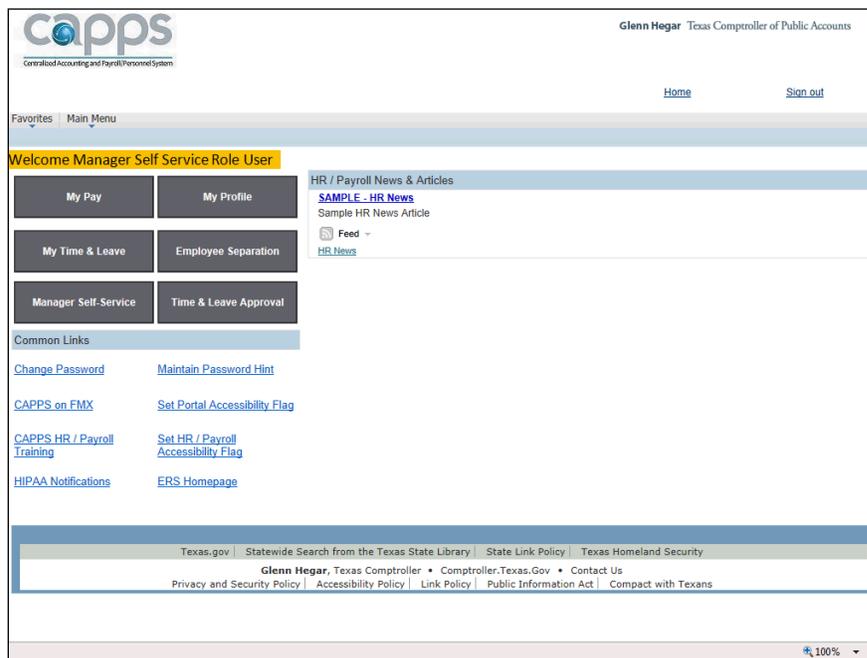
Reporting

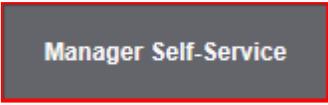
Section 2 - Lesson 1 Exercises - Reporting

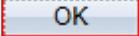
Procedure

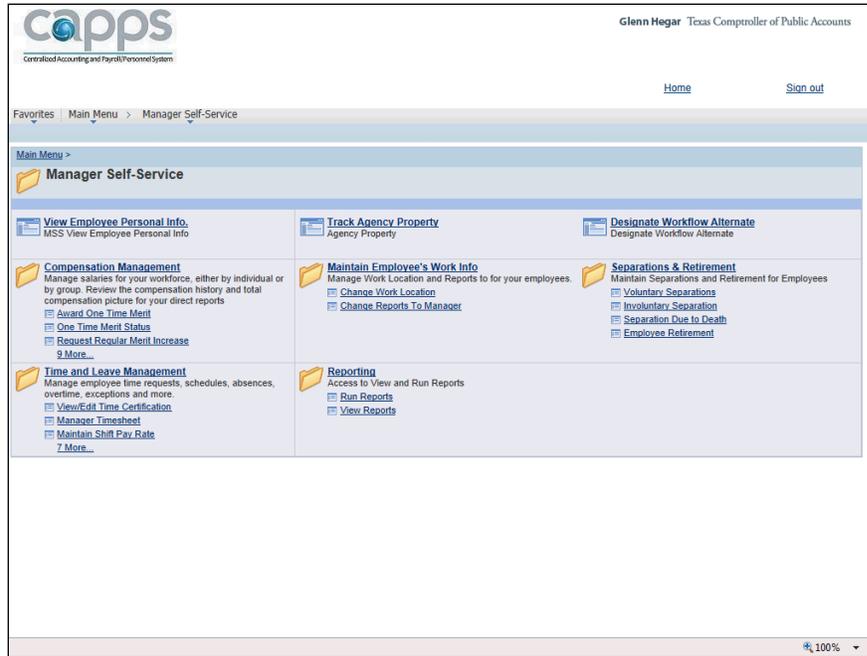
CAPPS has many reports that managers can run in order to gather information on their direct reports.

In this lesson you will learn how to run the **Employee Monthly Time & Leave Report**, as well as the **Time Reporting Codes by Date Report**.



Step	Action
1.	Navigate to the Run Reports page. Click the Manager Self-Service button. 
2.	Click the Reporting link. 
3.	Click the Run Reports link. 

Step	Action
4.	<p>The system lists several reports on the Reports Home page.</p> <p>Click the Employee Monthly Time & Leave Report link.</p> <p>Employee Monthly Time & Leave Report</p>
5.	<p>The report can be run for all of your Direct Reports, or you can select for specific employees.</p> <p>Click the Select All button to select all your Direct Reports.</p> <p></p>
6.	<p>Enter the last day of the month for the report you are running.</p> <p>Enter the desired information into the As Of Date field. Enter "02/28/2015".</p> <p>: <input type="text"/></p>
7.	<p>In the Report Request Parameters section, you have the option of Show LAC on the second page of the report.</p> <p>You also have the option to Show Attestment on the third page of the report. Agencies that require their employees to sign a hard copy will have a space for their signatures.</p>
8.	<p>Click the Process Report button.</p> <p></p>
9.	<p>The system displays the Message that the report has been scheduled.</p> <p>Click the OK button.</p> <p></p>
10.	<p>To see if the report has successfully completed, click the View Reports button.</p> <p></p>
11.	<p>On the View Reports page, the Process List shows whether the report has completed. Possible Run Status values include Queued, Processing, and Success.</p> <p>When Run Status = Success, the report is ready to view.</p> <p>Click the View Report link.</p> <p>View Report</p>
12.	<p>The report displays (among other things) Beginning and Ending Balances for most types of Leave; Leave Accrued/Earned; Leave Expiring within the next 3 months; Current Annual Leave Balance; Projected Accrual(s); Carry Over Maximum; and Hours Converting to Sick Leave for each of your direct reports, one per page.</p>



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Home Sign out

Favorites Main Menu > Manager Self-Service

Main Menu >

Manager Self-Service

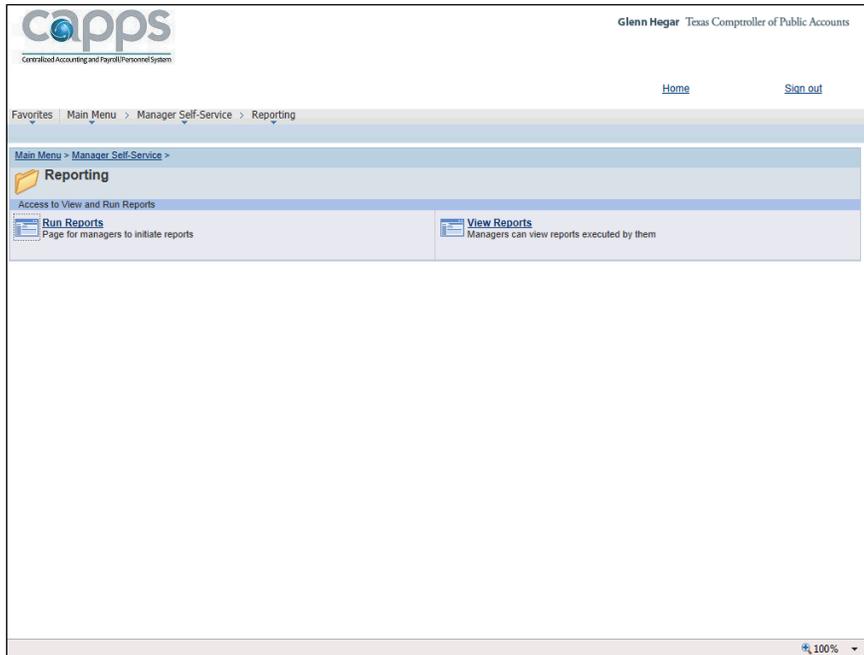
- View Employee Personal Info**
MSS View Employee Personal Info
- Track Agency Property**
Agency Property
- Designate Workflow Alternate**
Designate Workflow Alternate
- Compensation Management**
Manage salaries for your workforce, either by individual or by group. Review the compensation history and total compensation picture for your direct reports.
 - [Award One-Time Merit](#)
 - [One-Time Merit Status](#)
 - [Request Regular Merit Increase](#)
 - [9 More...](#)
- Maintain Employee's Work Info**
Manage Work Location and Reports for your employees.
 - [Change Work Location](#)
 - [Change Reports To Manager](#)
- Separations & Retirement**
Maintain Separations and Retirement for Employees
 - [Voluntary Separation](#)
 - [Involuntary Separation](#)
 - [Separation Due to Death](#)
 - [Employee Retirement](#)
- Time and Leave Management**
Manage employee time requests, schedules, absences, overtime, exceptions and more.
 - [View/Edit Time Certification](#)
 - [Manager Timesheet](#)
 - [Maintain Shift Pay Rate](#)
 - [7 More...](#)
- Reporting**
Access to View and Run Reports
 - [Run Reports](#)
 - [View Reports](#)

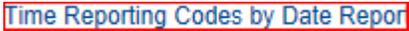
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Step	Action
13.	<p>Let's run another report.</p> <p>Click the Reporting link.</p> <p>Reporting</p>

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Step	Action
14.	Click the Run Reports link. 
15.	Now, we will run a second report from the Reports page. Click the Time Reporting Codes by Date Report link. 
16.	Run the report for the month of January. Enter the desired information into the Start Date field. Enter " 01/01/2015 ". <input type="text"/>
17.	Enter the desired information into the End Date field. Enter " 01/31/2015 ". <input type="text"/>
18.	Find the Time Reporting Code you want by entering the first two letters of the code. Enter the desired information into the TRC field. Enter " re ". <input type="text"/>
19.	Click the Look up TRC (Alt+5) button. 

Step	Action
20.	<p>The Look Up TRC displays any Time Reporting Code starting with the two letters "RE."</p> <p>Click on the REGHR code in the list.</p> <p>REGHR</p>
21.	<p>Again, you have the option to Select All your Direct Reports, or you can choose selectively. Choose Employee DEX for the report.</p> <p>Click the Include checkbox for Employee DEX.</p> <p><input type="checkbox"/></p>
22.	<p>Click the Process Report button.</p> <p>Process Report</p>
23.	<p>The Report has been scheduled.</p> <p>Click the OK button.</p> <p>OK</p>
24.	<p>Click the View Reports button.</p> <p>View Reports</p>
25.	<p>The View Reports page shows you the Process List.</p> <p>The Run Status of your report is Queued, which means that your report is not yet ready to view.</p> <p>Click the Refresh button.</p> <p>Refresh</p>
26.	<p>Now the Run Status = Success.</p> <p>Click the View Report link.</p> <p>View Report</p>
27.	<p>Total REGHR hours for this employee are shown by date.</p>
28.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>