CAPPS HR/PAYROLL
Agency Course Catalog
End-User Training (EUT)

EUT Course 111 –

Manager Self Service Light

PeopleSoft Version 9.2

Version 1a – April 2015

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Manager Self Service

Section 1 - Time and Leave Management

Manager Timesheet Entry

Section 1, Lesson 1 - Manager Timesheet Entry Exercise

Procedure

In this lesson you will learn how to enter time on behalf of your direct report. You will learn 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 and all months will display 31 days regardless of the amount of days in the month.

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Time and Leave Management** link.
3.	Click the **Manager Timesheet** link.
4.	Click the **Employee DEX** link.
5.	Note: When there is an exception on a timesheet, a banner moving across the top of the screen saying "You have an exception" will be displayed. At that time, the employee and manager will be locked out of the timesheet until it is resolved.
6.	The employee is taking annual leave. Click the **Look up Time Reporting Code (Alt+5)** button.
7.	Click the **ANLVT** link.

Step	Action
8.	Did you know that CAPPS uses decimals, not minutes for time reporting? For example: 15 minutes = .25 hours 30 minutes = .50 hours 45 minutes = .75 hours For example: if you work 7 1/2 hours, you would enter 7.50 hours on your timesheet, not 7:30. Enter the desired information into the **Thu 4/2 0.00** field. Enter "**8.00**".
9.	Whenever multiple Time Reporting Codes are required you must enter each on a separate line. Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.
10.	The employee is taking sick leave. Click the **Look up Time Reporting Code (Alt+5)** button.
11.	Click the scrollbar.
12.	Click the **SICKT** link.
13.	Enter the desired information into the **Tue 4/7 0.00** field. Enter "**4.00**".
14.	The employee worked 8 hours on April 21 and the hours need to be charged to a Labor Account Code. Because 4/21 is a holiday and they are scheduled to work, we need to use the TRC REGHW. Click the **Look up Time Reporting Code (Alt+5)** button.
15.	Click on the scrollbar.
16.	Click the **REGHW** link.

Step	Action
17.	Enter the desired information into the **Tue 4/21 0.00** field. Enter "**8.00**".
18.	Click on the scrollbar.
19.	The Labor Account Code is used for allocating hours for special purposes.
20.	Click the **Look up Labor Account Code (Alt+5)** button.
21.	Choose the applicable Labor Account Code for the activity. In this example use 608_ABT_OPERAT. Click the **608_ABT_OPERAT** link.
22.	Click the scrollbar.
23.	Click the **E-Sign & Approve** button.
24.	April 21 is a skeleton crew holiday. Click the **OK** button.
25.	Click the **OK** button.
26.	Now we will certify time for an employee. Click the **Time and Leave Management** button.
27.	Click the **View/Edit Time Certification** menu.
28.	The use of Time Certification will be determined by agency. Click the **Employee JMN** link.
29.	The employee has not certified their time for the January time period. Click the **Period** link.

Step	Action
30.	**Note:** Employees can also certify their hours on the Timesheet. Click the **E-Sign & Certify** button.
31.	Click the **OK** button.
32.	The manager has certified the employee's time for the January time period. After the time has been certified by the manager, the **Certified By:** field displays the manager's name. The **Date/Time Stamp:** field displays when the certification was done. If the employee had certified the time, the employee's name would have displayed.
33.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

View Time

Section 1, Lesson 2 - View Time Exercise

Procedure

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

Step	Action
1.	Click the **Time and Leave Management** link.
2.	Choose the employee whose leave you want to view. Click the **View Leave Balance/Expirations** link.
3.	Click the **Employee PFF** link.
4.	The Leave Time Balance Summary displays all Comp Time plans, the balances and all time expiring. Click the **Show next row (Alt+.)** button.
5.	The employee has an available balance of 27.00 hours of Annual Leave. Click the **Show next row (Alt+.)** button.
6.	This page displays **FLSA Overtime** for an employee. Click the **Show next row (Alt+.)** button.
7.	This page displays **Compensatory Time** for an employee. Click the **Show next row (Alt+.)** button.
8.	Click the **Show next row (Alt+.)** button.

Step	Action
9.	Click the **Show next row (Alt+.)** button.
10.	Click the **Show next row (Alt+.)** button.
11.	Click the **Show next row (Alt+.)** button.
12.	The employee has 8 hours of Holiday Comp Time. The manager can check to see when this time will expire. Click the **Show Time Expiring in** list.
13.	There are 4 expiration choices: Next 30 days Next 90 days One Year Show All Click the **Show All** list item.
14.	The employee has 8 hours of Holiday Comp Time expiring on August 27, 2015.
15.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Maintain Shift Pay Rate

Section 1, Lesson 3 - Maintain Shift Pay Rate Exercise

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 **Time and Leave Management** link.
2.	Click the **Maintain Shift Pay Rate** link.
3.	Click the **Test Staffer** link.
4.	The page displays the **Current Status** of the shift and the **Proposed Status** when the percent is changed.
5.	Enter the desired information into the **Regular Evening Shift(%)** field. Enter "**1.5**".
6.	The new percent was entered in the shift rate field. Tab out to populate the dollar amount of the change. Press **[Tab]**.
7.	The dollar amount was changed from $23.50 to $35.25. Click the **E-Sign & Approve** button.
8.	Click the **OK** button.
9.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Leave Without Pay

Section 1, Lesson 4 - Leave Without Pay Exercise

Procedure

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

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Time and Leave Management** link.
3.	Click the **Manager Timesheet** link.
4.	Click the **Employee PFF** link.
5.	Click the **Look up Time Reporting Code (Alt+5)** button.
6.	The employee is taking Leave Without Pay - Employee. Click the **LWPEO** link.
7.	Enter the desired information into the **Mon 4/6 0.00** field. Enter "**8.00**".
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**".

Step	Action
11.	The employee will take 40 hours of Leave Without Pay, beginning April 6 to April 10. Enter the desired information into the **Fri 4/10** field. Enter "**8.00**".
12.	Click the scrollbar.
13.	By clicking the **E-Sign & Approve** button the manager will approve the employee's Leave Without Pay. Click the **E-Sign & Approve** button.
14.	Click the **OK** button.
15.	**Note:** Longevity is not paid if the employee is on Leave Without Pay for the entire first scheduled day of the month. In this lesson the employee worked the first scheduled day of the month, so the Longevity pay was not affected. When LWOP is entered and approved on the Timesheet, the next available earnings will be docked. If LWOP is removed from the Timesheet the next available earnings will be credited. If LWOP is at least one calendar month, the employee's service date is decreased by that amount of time. In this scenario there will be no effect on the employee's service date.
16.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Employee Schedules

Section 1, Lesson 5 - Employee Schedules Exercise

Procedure

This lesson demonstrates how a manager can:
1. Assign a new schedule for a future date.
2. Override the schedule for the current week.

Step	Action
1.	Click the **Time and Leave Management** link.
2.	Click the **View/Edit Time and Leave Setup** link.
3.	Click the **Employee STS** link.
4.	The Schedule ID Breakdown shows the alpha characters used in place of 2-digit numbers. This chart helps you understand how to interpret a Schedule ID and Description. Press **[Enter]**.
5.	Note the explanation for new hires.
6.	1. Assign a new schedule for a future date. The employee's schedule is changing and will be entered by the manager. Click the **Add a new Schedule (Alt+7)** button.
7.	All schedules start on a Sunday, but the employee's FLSA workweek will correctly interpret their Saturday or Sunday workweek for comptime/overtime calculations. Click the **Choose a date (Alt+5)** button.
8.	Click the dropdown button to activate the menu.

Step	Action
9.	Click the **April** list item.
10.	Click the **5** link.
11.	Click the lookup icon.
12.	In this example, the schedule reads zero hours on Sunday, 7 on Monday, 9.5 on Tuesday, 7 on Wednesday, 9.5 on Thursday, 7 on Friday, and zero on Saturday. Click the **40 HRS XX-07-95-07-95-07-XX** link.
13.	Click the **E-Sign & Approve** button.
14.	Click the **OK** button.
15.	Click the **Time and Leave Management** menu.
16.	<u>2. Override the schedule for the current week.</u> Click the **Override Scheduled Workday** menu.
17.	The manager wants the employee to work on Saturday and take off Monday. This schedule is only for the current week and will be changed on the **Override Scheduled Workday** page. Click the **Look up Saturday 03/21/2015 (Alt+5)** button.
18.	Click the **8** link.
19.	Delete Monday's hours. Press **[Delete]**.
20.	Enter the desired information into the **Monday 03/16/2015** field. Enter "**0.00**".

Step	Action
21.	Notice the employee's hours for the week now total 40 instead of 48. Click the **E-Sign & Approve** button.
22.	Click the **OK** button.
23.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Manager Approvals

Section 1, Lesson 6 - Manager Approvals Exercise

Procedure

Hours that are entered and submitted by employees need approval from their manager.

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

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

Step	Action
1.	Click the **Manager Self Service** link.
2.	Click the **Time and Leave Management** link.
3.	Click the **Manager Summary Approval Page** link.
4.	Note: Your agency may use this page for approvals or as a view only page. The view only access will have the Approve and Deny boxes grayed out and they will need to drill down to the Timesheet in order to approve the time using the employee name link.
5.	The manager has one employee with hours that need approval. In addition to accessing the **Manager Summary Approval** page to find employees who need hours approved, a reminder process was created to notify managers that they have hours to approve (hours in **NA** status). Ten 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, an email is auto-generated and sent to the next level manager.
6.	If the Manager Summary Approval page is not view only, the manager can approve/deny hours for an individual employee for the entire month.

Step	Action
7.	On the **Manager Timesheet**, the manager can deny hours by row. There could be multiple days with hours on a row in a Needs Approval status, but once **Deny** is clicked then it denies everything on that row. When the manager clicks the **E-Sign & Approve** button it will automatically approve all hours in NA status for the month you are currently viewing.
8.	The manager has chosen to approve the hours and clicks the approve button. Click the **Approve** option.
9.	Note: It is a best practice to view your employee's Timesheet prior to approving the time. Click the **E-Sign & Approve** button.
10.	Click the **OK** button.
11.	The employee's hours have been approved and no longer display on the **Manager Summary Approval** page.
12.	Congratulations! You have successfully completed the lesson. **End of Procedure.**

Section 2 - Reporting

Reporting

Section 2, Lesson 1 - Reporting Exercise

Procedure

CAPPS provides many reports that managers can run to gather information on their direct reports.

In this lesson the Employee Monthly Time and Leave Report will be run.

Step	Action
1.	Click the **Manager Self-Service** link.
2.	Click the **Reporting** link.
3.	Click the **Run Reports** link.
4.	There are multiple reports you can select on the **Reports** page. Click the **Employee Monthly Time & Leave Report** link.
5.	This report can be run for all of your direct reports or for specific employees. Click the **Select All** button to process all employees.
6.	Enter the last day of the month for the report you are running. Enter the desired information into the **As Of Date** field. Enter "**02/28/2015**".
7.	In the **Report Request Parameters** section you are given the option of showing the Labor Account Codes (LAC) which display on the second page of the report. You also have the option to click on **Show Attestment**. This prints on the third page so that agencies who require their employees to sign a hard copy have a space for their signature.
8.	Click the **Process Report** button.

Step	Action
9.	Click the **OK** button.
10.	Click the **View Reports** button.
11.	Click the **View Report** link.
12.	The report displays: beginning and ending balances for most types of leave, leave accrued/earned, leave expiring within the next 3 months, current annual leave balances, projected accruals, carry over maximum and hours converting to sick leave for each of your direct reports.
13.	Click the **Reporting** link.
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.	Enter the desired information into the **Start Date** field. Enter "**01/01/2015**".
17.	Enter the desired information into the **End Date** field. Enter "**01/31/2015**".
18.	Look up the Time Reporting Code you want to show on the report. Enter the desired information into the **TRC** field. Enter "**re**".
19.	Click the **Look up TRC (Alt+5)** button.
20.	Click on the **REGHR** code in the list.
21.	Click the **Include** option.

Step	Action
22.	Click the **Process Report** button.
23.	Click the **OK** button.
24.	Click the **View Reports** button.
25.	Notice the **Run Status** is **Queued.** Click the **Refresh** button.
26.	Notice the **Run Status** is now **Success.** Click the **View Report** link.
27.	The total REGHR hours for the employee are shown by date.
28.	Congratulations! You have successfully completed the lesson. **End of Procedure.**