

# University of Houston System

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## PeopleSoft Manager Self-Service Guide



University  
of Houston  
Clear Lake



UNIVERSITY OF  
HOUSTON - VICTORIA



University of Houston  
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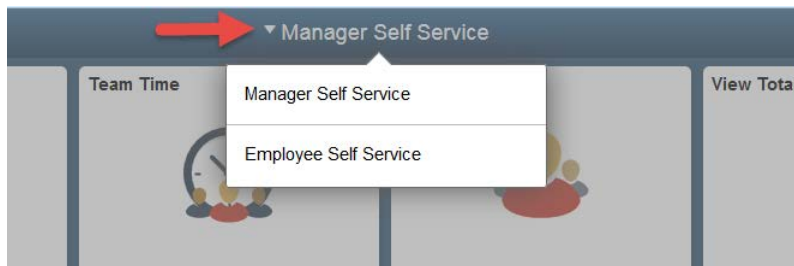
## Accessing Manager Self-Service (MSS)

### What's New?

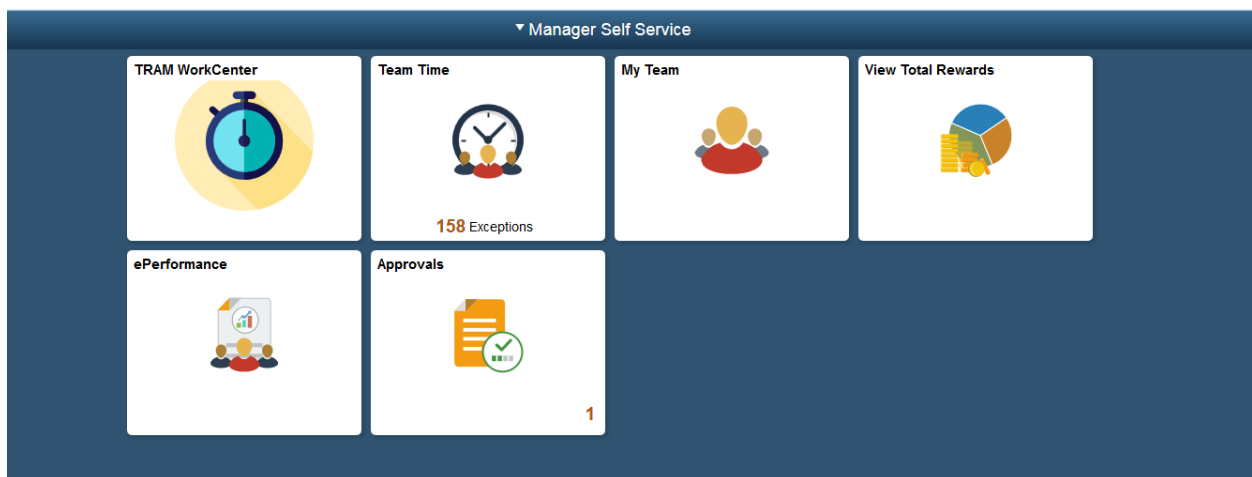
The University of Houston System is upgrading our PeopleSoft HR system with the latest technology released by Oracle. When you log in, you will see Employee and Manager Self-Service homepages with tiles. Each of the tiles is interactive, making it easy for you to access and navigate the system. Many 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

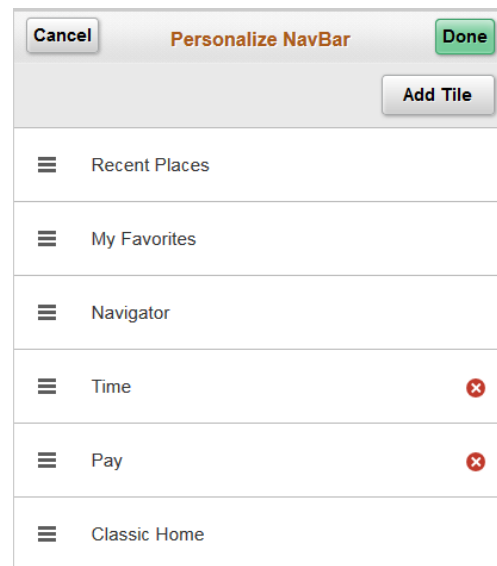
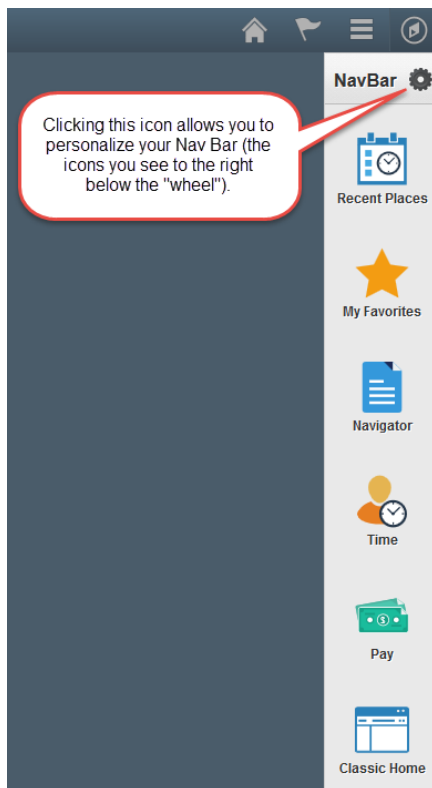


**(Actions List)** Frequently called “the hamburger,” tap to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-appropriate personalization options.



**(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

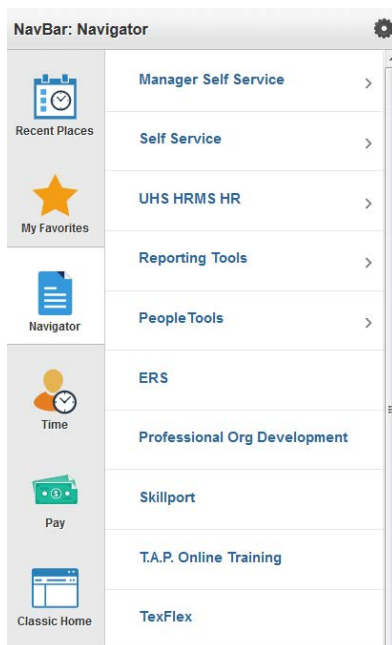
This configurable icon allows you to determine your favorites to display here. Favorites that you have saved prior to this update will be accessible here.

### 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.

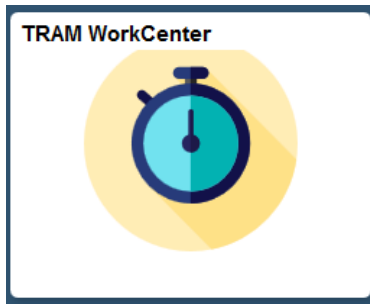


### Tiles

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).

Last Name	First Name	Employee ID	Empl Rcd Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
Last Name				0.000000	0.000000	0.000000			0.000000	0.000000

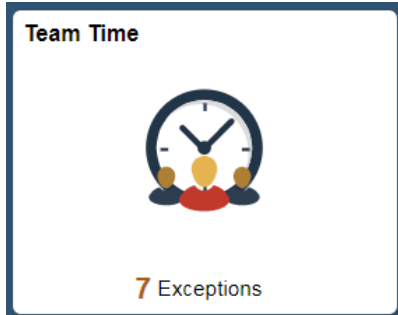
You will notice that the “Links” section on the bottom left no longer includes absence actions. These are now located in the Team Time Tile.

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.

The screenshot shows the "Team Time" interface. On the left is a navigation pane with options: Request Absence, View Requests, Absence Balances, Manage Exceptions, Reporting Locations, and Manager Search Options. The main area is titled "Team Time" and contains a "Search Options" section and a "Select Employee" section. Below this is a table with the following data:

Name / Title / ID - Rcd#	Directs / Total	Status / Type	Department / Location
Amanda Bentley Mgr, HRIS 0100003 - 0	4/5	Active Employee	Human Resources Human Resources

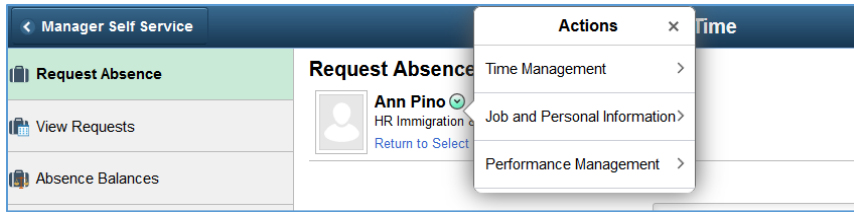
To start a task, select the appropriate action from the left navigation pane, then select the employee from your list.

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

The screenshot shows the "Team Time" interface with the "Absence Balances" option selected in the left navigation pane, indicated by a red arrow. The main area displays the "Absence Balances" for Amanda Bentley (Mgr, HRIS). Below this, there is a table showing the following data:

<b>Sick</b>	260.00
<b>Vacation</b>	29.00

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

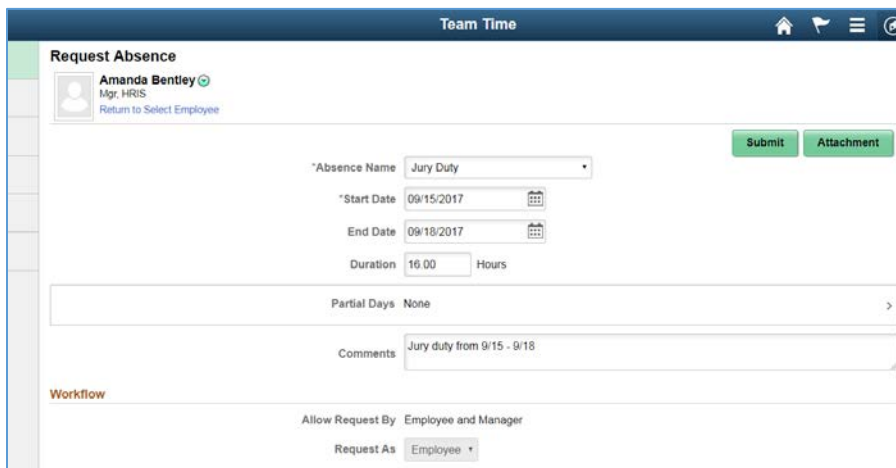


## Absences

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.

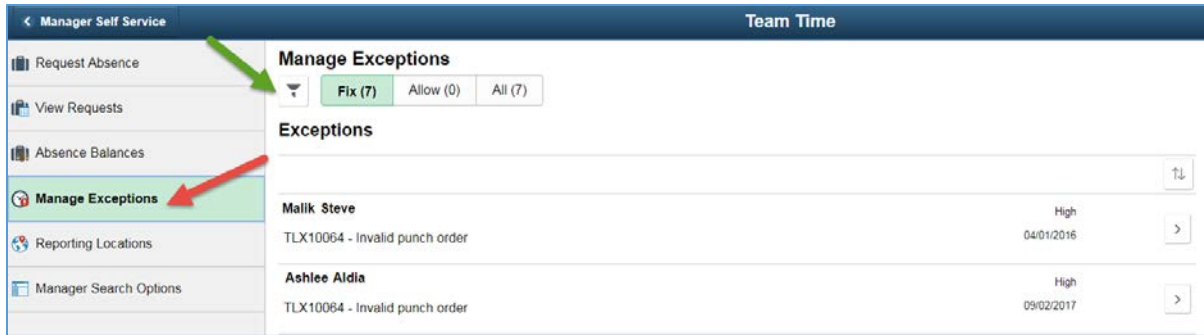
Absences can be submitted, and approved, easily using mobile devices. Absences are approved through the Approvals tile, covered later in this document.


A screenshot of the 'Request Absence' form in the 'Team Time' tile. The form is for 'Amanda Bentley', a Manager in HRIS. It includes fields for 'Absence Name' (Jury Duty), 'Start Date' (09/15/2017), 'End Date' (09/18/2017), and 'Duration' (16:00 Hours). There is a 'Partial Days' dropdown set to 'None' and a 'Comments' field with the text 'Jury duty from 9/15 - 9/18'. At the bottom, there is a 'Workflow' section with 'Allow Request By' set to 'Employee and Manager' and 'Request As' set to 'Employee'. There are 'Submit' and 'Attachment' buttons at the top right.

## 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.

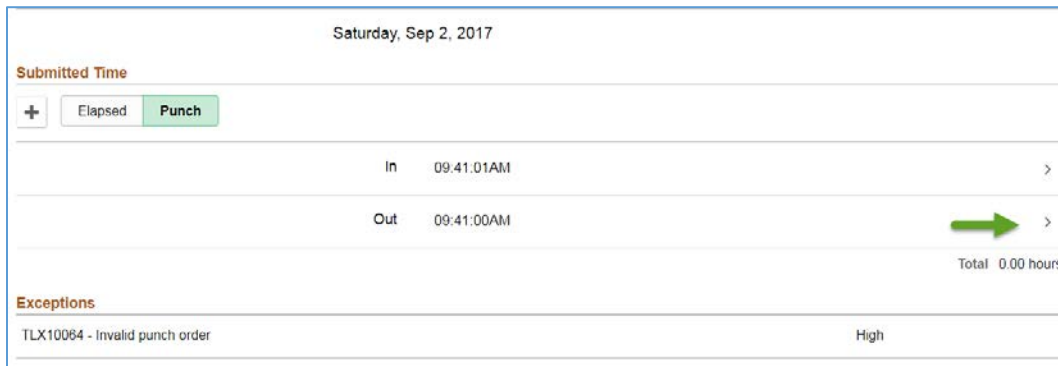




Use the Filter icon  to search for a specific employee or department.

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.



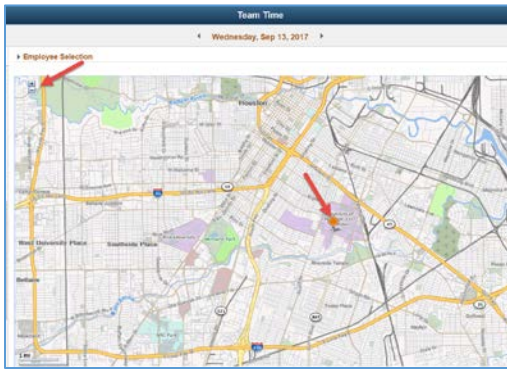
In this example, we will correct the Out punch for the employee and then click Submit. The timesheet is updated with the new punch time. When Time Administration runs, the exception will be cleared.



## 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.

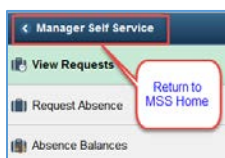
Manager Search Options

Select Default Criteria and Options

Jennifer McMillin

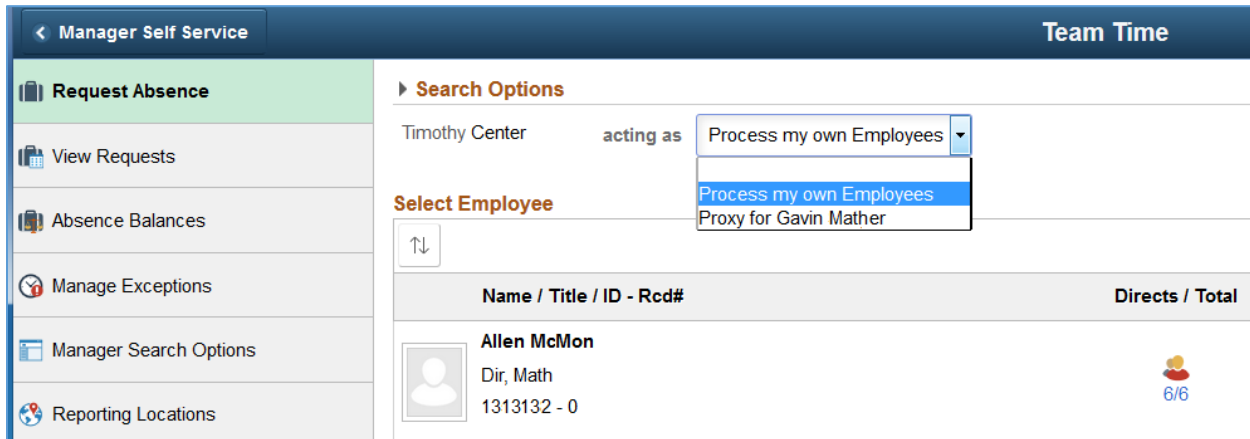
Loading of Matching Employees		Default Criteria Presentation	
<input type="radio"/> Auto Populate Results	<input type="radio"/> Show Criteria List Collapsed	<input type="radio"/> Show Criteria List Collapsed	<input checked="" type="radio"/> Show Criteria List Expanded
<input checked="" type="radio"/> Prompt for Results			
<input checked="" type="checkbox"/> Show Schedule Information			
Employee Selection Criteria			
Description	Selection Criterion Value	Include in Criteria	Include in List
Employee ID	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Last Name	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
First Name	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Department	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Reports To Position Number	01014309	<input checked="" type="checkbox"/>	<input type="text"/>

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



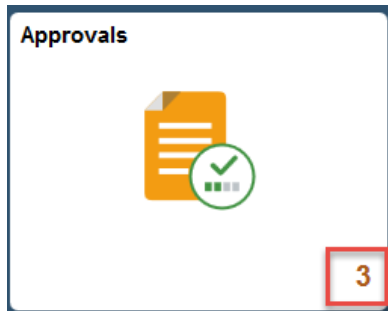
### Delegations

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.

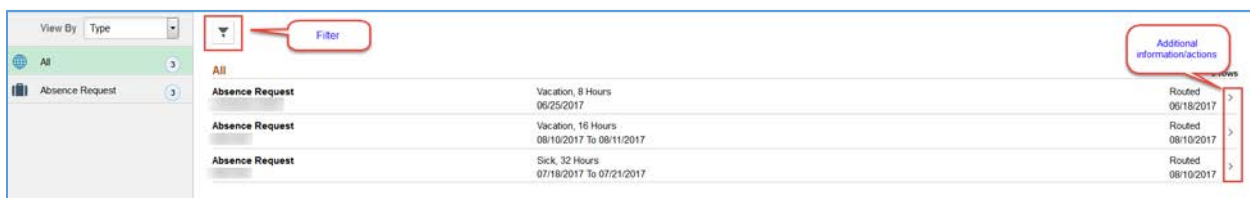


### Approvals Tile

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

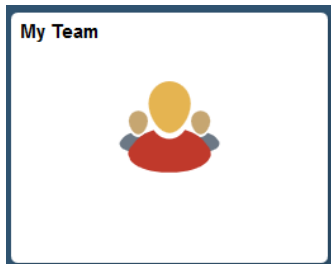


Select each transaction to view more information or take action on this approval item. If accessing an absence request, the system displays a page where managers can approve, or deny,

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

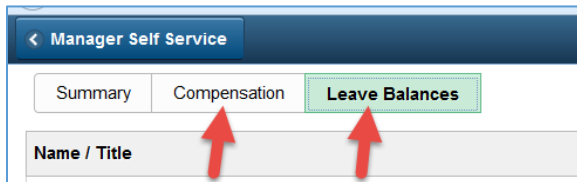
The My Team tile can be viewed either in a grid, or in a business card format. To change the format, click the icons circled below in red.

Grid view:

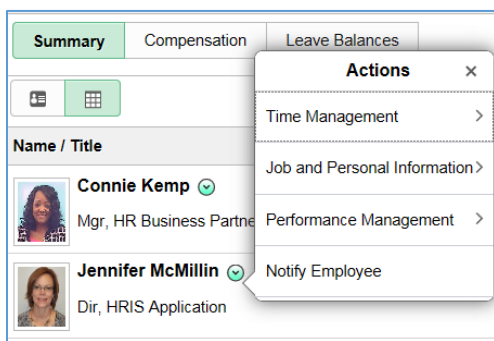
Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
<b>Connie Kemp</b> Mgr, HR Business Partners	7/9	Human Resources Human Resources	ckemp2@uh.edu 713/743-5703	
<b>Jennifer McMillin</b> Dir, HRIS Application	1/6	Human Resources Human Resources	jmcmillin@uh.edu 713/743-5247	
<b>Sandra Armstrong</b> Exec Dir, Human Resources Ops	3/22	Human Resources Human Resources	sgarmstrong@uh.edu 713/743-1962	
<b>Shelia Williams</b> Asst, Administrative, Exec		Human Resources Human Resources	srwilliams4@uh.edu 713/743-9351	

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

The screenshot shows a web interface titled "View Total Rewards" under "Manager Self Service". It includes a "Search Options" section and a "Select Employee" section with a table of employees.

Name / Title / ID	Status / Type
 <b>Amanda Bentley</b> Mgr, HRIS 0100003	Active Employee

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

The screenshot shows the "Total Rewards Summary" page. It includes a title, a descriptive paragraph, a "View Summary Chart" link, a total value of \$42,387.50, a pie chart for "Compensation", and a summary table.

**Total Rewards Summary**  
 Your Total Rewards Statement shows the value you gain while working at the University of Houston. This tool allows you to review your Compensation, Ret... provides you with the insights on the Total Rewards of your UH Benefits and Compensation.  
 All amounts are shown in US Dollar currency.

▼ View Summary Chart

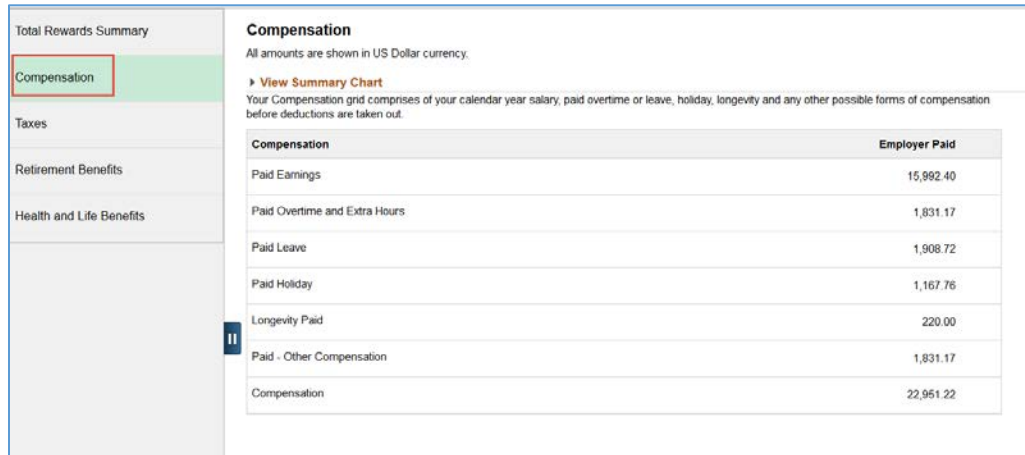
**Total Value \$42,387.50**

Compensation

The Pie chart in this section demonstrates the breakdown of each category value of your Total Rewards

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
<b>Total Rewards Summary</b>	<b>42,387.50</b>	<b>0.00</b>

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



**Total Rewards Summary**

**Compensation**

All amounts are shown in US Dollar currency.

[View Summary Chart](#)

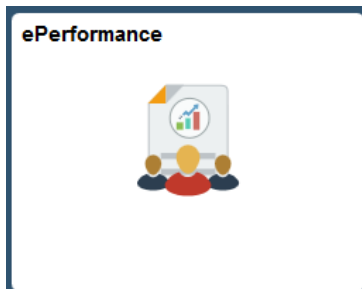
Your Compensation grid comprises of your calendar year salary, paid overtime or leave, holiday, longevity and any other possible forms of compensation before deductions are taken out.

Compensation	Employer Paid
Paid Earnings	15,982.40
Paid Overtime and Extra Hours	1,831.17
Paid Leave	1,908.72
Paid Holiday	1,167.76
Longevity Paid	220.00
Paid - Other Compensation	1,831.17
Compensation	22,951.22

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.

- Current Documents
- Historical Documents
- Approve Documents
- Maintain Performance Notes
- Transfer Document
- Cancel Document
- Reopen Document

**Current Performance Documents**  
Listed are the current performance documents for which you are the Manager.

**Filter Criteria**

First Name  Last Name   
Document Type  Document Status   
Period Between  -

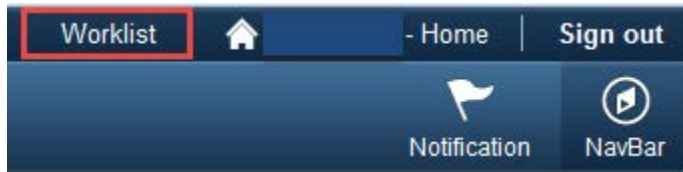
**Performance Documents** Personalize | Find |  |  First  1-10 of 10  Last

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
		Performance Document	Evaluation in Progress	01/01/2017	12/31/2017	Security Officer	03/01/2018

## 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.

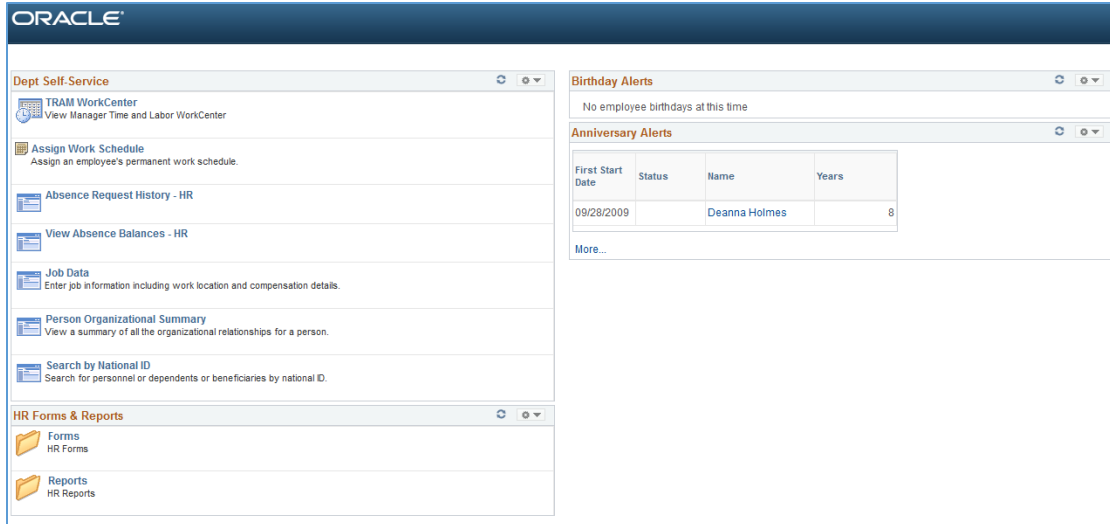


## Alerts and eForms

### 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.





The screenshot displays the Oracle HR Self-Service interface. The left sidebar contains the following sections:

- Dept Self-Service**
  - TRAM WorkCenter: View Manager Time and Labor WorkCenter
  - Assign Work Schedule: Assign an employee's permanent work schedule.
  - Absence Request History - HR
  - View Absence Balances - HR
  - Job Data: Enter job information including work location and compensation details.
  - Person Organizational Summary: View a summary of all the organizational relationships for a person.
  - Search by National ID: Search for personnel or dependents or beneficiaries by national ID.
- HR Forms & Reports**
  - Forms: HR Forms
  - Reports: HR Reports

The main content area shows:

- Birthday Alerts**: No employee birthdays at this time.
- Anniversary Alerts**: A table listing an anniversary for Deanna Holmes.

First Start Date	Status	Name	Years
09/28/2009		Deanna Holmes	8

More...

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.