

State of North Dakota



PeopleSoft HCM 8.9 Absence Management

Manager Self Service Guide

PeopleSoft HCM Absence Management Manager Self Service Guide

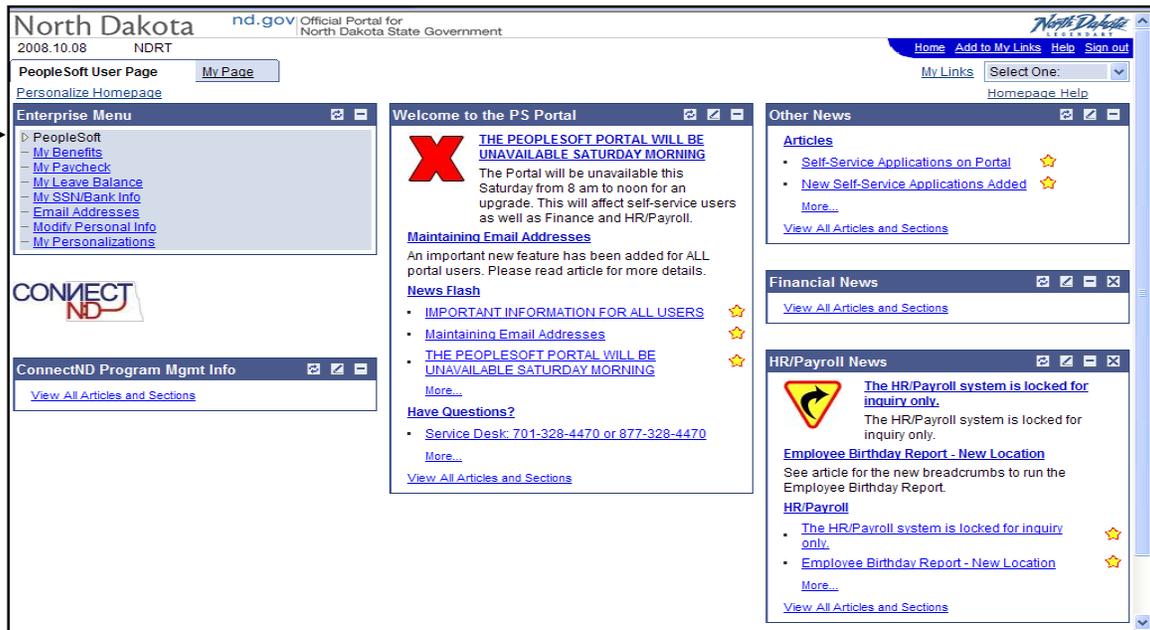
Table of Contents

REQUEST AN ABSENCE ON BEHALF OF AN EMPLOYEE	3
MODIFYING A SAVED ABSENCE REQUEST AND VIEWING ABSENCE REQUEST HISTORY	6
APPROVING, DENYING, REQUEST RE-WORK	8
CHANGING AN EMPLOYEE'S SCHEDULE	10
VIEWING AN EMPLOYEE'S ABSENCE BALANCES.....	12
VIEW MONTHLY TIME CALENDAR	13

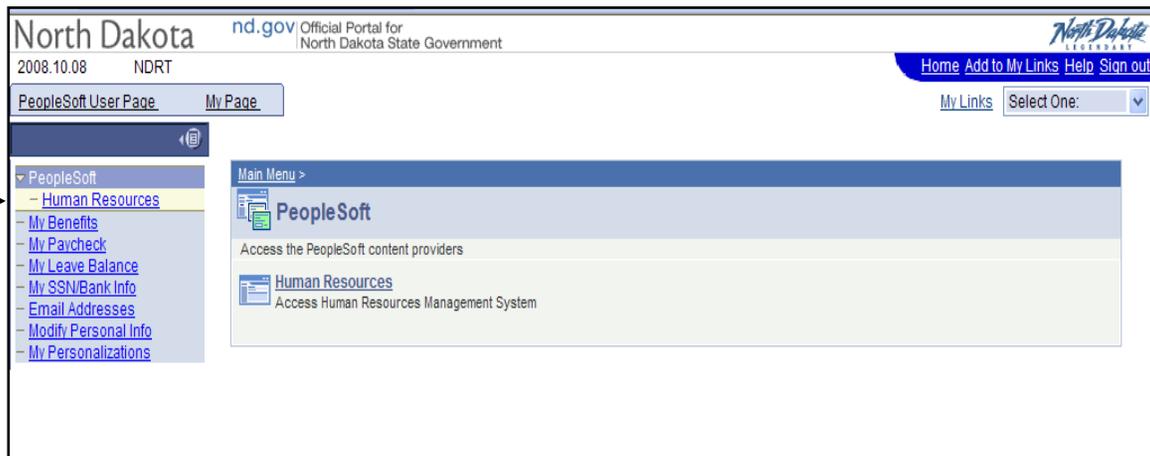
PeopleSoft HCM Absence Management Request an Absence on Behalf of an Employee Manager Self Service Guide

Request an Absence on Behalf of an Employee

To request an absence using Absence Management, go to the Portal Page and click on the hyperlink for [PeopleSoft](#).



Then, click on the hyperlink for [Human Resources](#).



PeopleSoft HCM Absence Management Request an Absence on Behalf of an Employee Manager Self Service Guide

Navigate: Manager Self Service > Time Management > Report Time > Absence Request

This will display a list of employee's reporting to you. Employee's reporting to you is populated automatically by the system via Position Managements "Reports To" field.

Name	EmplID	Job Title	Department
Sheryl Haldorson	0189164	STATE PAYR	OMB
Vonnie Grinsteiner	0207107	STATE PAYR	OMB

- Enter the start date of the absence and then click "GO", this will ensure the employee is reporting to you on the date of the absence, before an absence is entered.
- Select the employee that an absence will be entered for by clicking their name. The following page will appear:

* Required Field

Go To: [View Absence Request History](#)
[View Absence Balances](#)
[Direct Reports](#)

- Next, enter in the details of the absence. Please see the Employee Self Service Guide for more details on how to complete this request.
- Enter the Start Date, End Date, Absence Name, Partial Days (if applicable) and the Start Time and End Time (if applicable).

PeopleSoft HCM Absence Management Request an Absence on Behalf of an Employee Manager Self Service Guide

Request Absence
Spencer Corkum
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

Absence Detail

* Start Date: 10/01/2008 [View Monthly Calendar](#)
End Date: 10/01/2008
Filter by Type: All
* Absence Name: Sick Leave Standard **Current Balance: 16.00 Hours****
Partial Days: None
Start Time: 8:30AM
End Time: 5:00PM
Duration: 8.00 Hours
Forecast: Returned Value: ELIGIBLE
Completed Successfully!
Date Time: October 08, 2008 at 09:54:41
[Calculate Duration](#) [Forecast Balance](#) [View Forecast Details](#)

Workflow

Allow Request By: Employee and Manager
Request As: Employee

Comments

Requestor Comments:

* Required Field
**Disclaimer: The current balance does not reflect absence requests that have not been processed.

[Save for Later](#) [Submit](#)

Go To: [View Absence Request History](#)
[View Absence Balances](#)
[Direct Reports](#)

- Once the details of the absence have been entered, click the **“Forecast Balance”** button. If the **“Forecast Balance”** button is not available, this is due to the absence type. Absences such as Jury Duty do not have the Forecast feature.

- If applicable, once forecasted, a Returned Value of either **“Eligible”**, or **“Ineligible”** will show in the Forecast message above the Forecast Balance button.

NOTE: This message will only appear after the Forecast Balance button has been clicked. If the value of **“Ineligible”** is returned by the system, the **“Submit”** button will be grayed-out indicating that the employee does NOT have enough hours in their balance for the absence hours they are requesting.

- If the value of **“Eligible”** is returned the request may be submitted for approval. Click the **“Submit”** button, an **“Approve Confirmation”** message will appear stating the absence request was successfully approved. Click **OK** to continue and save.
- This will trigger an email notification to the employee; however the supervisor will also receive an email stating that there is an absence pending approval. The approval email can be ignored as the absence request submitted by the manager is automatically approved.
- If you choose not to submit the request at this time, you may **“Save for Later.”** If you **“Save for Later”**, the absence will not be processed until **“Submitted.”**

Modifying a Saved Absence Request and Viewing Absence Request History

Navigate: Manager Self Service > Time Management > View Time > Absence Request History

This will display a list of employees reporting to you. (Employee's reporting to you is populated automatically by the system via Position Management's "Reports To" field.) The Transaction Effective Date will default to today's date. This date can be changed once you are in the "Absence Request History Page" of the selected employee.

Select the employee for which you are looking to modify an absence or wish to view a previous absence request.

View Employee Absence Requests

Select Employee

Tina Bauer

Select an employee to view absence request history by clicking on the employee name, clicking on Search for an employee, or clicking on the chart icon to find an indirect report.

Transaction Effective Date:

Direct Reports For Tina Bauer			
Name	EmplID	Job Title	Department
Sheryl Haldorson	0189164	STATE PAYR	OMB
Vonnice Grinsteiner	0207107	STATE PAYR	OMB

[Return To Manager Self Service](#)

Absence Request History

Sheryl Haldorson

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and click Refresh. Select the absence name link to view request details. Select edit button to modify or delete the request.

From: Through:

Absence Request History					
Absence Name	Status	Start Date	End Date	Duration	Requested By
Comp Time Taken	Approved	07/30/2008	08/01/2008	24 Hours	Manager <input type="button" value="Edit"/>
Annual Leave Standard	Saved	08/07/2008	08/07/2008	8 Hours	Manager <input type="button" value="Edit"/>
Sick Leave Standard	Submitted	08/11/2008	08/11/2008	8 Hours	Employee <input type="button" value="Edit"/>

- Once the employee has been selected, a list of all absences requested for that employee will appear. If you do not see the absence, please update the "From and Through" dates and then click **Refresh**.
- If the absence event is listed, click "EDIT" to open the absence. **NOTE:** The "EDIT" buttons that are grayed-out cannot be edited because they have been "Approved" or "Needs Approval".

PeopleSoft HCM Absence Management Modifying a Saved Absence & Viewing History Manager Self Service Guide

Absence Detail

Main Content: [View Monthly Calendar](#)

*Start Date: 08/21/2008

End Date: 08/21/2008

Filter by Type: All

*Absence Name: Annual Leave Standard **Current Balance: 8.00 Hours****

Reason: Select Absence Reason

Partial Days: None

Duration: 8.00 Hours

Start Time: 08.30.00

End Time: 17.00.00

Forecast: Returned Value: ELIGIBLE
Completed Successfully!
Date Time: August 21, 2008 at 22:08:11

Calculate Duration Forecast Balance [View Forecast Details](#)

Workflow

Status: Data Saved

Allow Request By: Employee and Manager

Request As: Employee

Comments

Requestor Comments:

* Required Field
**Disclaimer: The current balance does not reflect absence requests that have not been processed.

Save for Later Submit Cancel

- You must forecast the absence again before you are able to submit for Leave Types requiring forecasting such as Annual Leave and Sick Leave. Click the **Forecast Balance** button and the **Submit** button will become available (assuming they are **Eligible**).
- Once you click the **SUBMIT** button you will receive confirmation that the absence request was successfully approved. Click **OK** to continue and save.

Approving, Denying, Request Re-work

Navigate: Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests

Absence Requests
Tina Bauer
STATE PAYROLL ADMIN OFF
Click on the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by clicking on the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.

*Show Requests by Status:

Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status	Submitted
Tonya Bauer	7015021	STATE PAYROLL SPECIALIST	Sick Leave Standard	09/08/2008	09/08/2008	Submitted	10/08/2008
Spencer Corkum	7015016	STATE PAYROLL ADMIN OFF	Sick Leave Standard	08/15/2008	08/15/2008	Submitted	10/08/2008

- This will bring up a list of all absence requests pending your approval for the employees that report to you. If there are no Absence Requests pending, the system will display a message indicating there are no results to display. The valid values are as follows: Approved, Denied and Pending.

Absence Requests
Tina Bauer
STATE PAYROLL ADMIN OFF
Click on the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by clicking on the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.

*Show Requests by Status:

Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status	Submitted
Tonya Bauer	7015021	STATE PAYROLL SPECIALIST	Sick Leave Standard	09/08/2008	09/08/2008	Submitted	10/08/2008
Spencer Corkum	7015016	STATE PAYROLL ADMIN OFF	Sick Leave Standard	08/15/2008	08/15/2008	Submitted	10/08/2008

- Click on the name of the employee to obtain the absence details, review, and either Deny, Request Re-work, or Approve.

PeopleSoft HCM Absence Management Approving, Denying, Request Re-Work

Manager Self Service Guide

Request Details

Tonya Bauer
Review the details for this request and either approve, deny or submit for rework. You may also enter optional comments about each approval choice.

Details	
Start Date:	09/08/2008
End Date:	09/08/2008
Absence Name:	Sick Leave Standard
Current Balance:	8.00 Hours**
Partial Days:	None
Duration:	8.00 Hours
	Start Time
	End Time

Workflow	
Status:	Submitted

Comments	
Requestor Comments:	
Approver Comments:	<input type="text"/>

**Disclaimer: The current balance does not reflect absence requests that have not been processed.

- If you click the **“Deny”** button, the employee will be notified by email, and the absence request will now appear in your denied status.
- If you click the **“Needs Rework”** button, the employee will be notified via email and it will be removed from your list of pending approvals.
- If you click the **“Approve”** button, the employee will be notified by email, and the absence will now be ready for processing.

Changing an Employee's Schedule

Navigate: Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

Assign Work Schedule
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID: begins with [] []
Empl Rcd Nbr: = [] []
Name: begins with [] []
Last Name: begins with [] []
Business Unit: begins with [] []
Department: begins with [] []
Organizational Relationship: = [] []

Include History Correct History Case Sensitive

[Basic Search](#)

- Enter the employee's EMPLID you want to change the schedule for.

Assign Work Schedule

Spencer Corkum EmpID: 7015016
Job Title: STATE PAYROLL ADMIN OFF Empl Rcd Nbr: 0

[Click for Instructions](#)

Assign Schedules Customize | Find | View All | First 1 of 1 Last

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	
06/01/2008	Select Predefined Schedule	STATE	ND003	8:00-5:00 (8 hours/day)	Show Schedule + -

▶ [View history of Schedule Assignments, including default changes](#)

- This will show you the employee's current schedule, and your options of changing the employee's schedule.
- To change the employee's schedule, click the "+" button on the right hand side, which will add a new row.

Changing an Employee's Schedule

Assign Work Schedule

Spencer Corkum EmplID: 7015016
 Job Title: STATE PAYROLL ADMIN OFF Empl Rcd Nbr: 0

[Click for Instructions](#)

Assign Schedules Customize | Find | View All | First | 1-2 of 2 | Last

Primary Details Alternate Details

Effective Date	Assignment Method	Schedule Group	Schedule ID	Description	
10/01/2008	Select Predefined Schedule	STATE	ND006	7:30-4:30 (8 hours/day)	Show Schedule + -
06/01/2008	Select Predefined Schedule	STATE	ND003	8:00-5:00 (8 hours/day)	Show Schedule + -

[View history of Schedule Assignments, including default changes](#)

- Enter in the Effective Date, choose “Select Predefined Schedule” under Assignment Method, enter in the Schedule Group and then the Schedule ID and then click the **SAVE** button. If you don’t know the Schedule Group or Schedule ID you can click on the look up button .
- To display a Schedule for a Schedule ID click the hyperlink “[Show Schedule](#)”.

The following page will be displayed once the “[Show Schedule](#)” hyperlink has been clicked:

Schedule Calendar

Schedule Group: STATE State of ND Schedule Group
 Schedule ID: ND006 7:30-4:30 (8 hours/day)

From Date: 10/01/2008

Schedule Calendar Customize | Find | First | 1-7 of 7 | Last

Day	Date	Workday ID	Shift ID	In	Lunch	In	Out	Time Zone	Sched Hrs	
Wednesday	10/01/2008	WORKDAY1-7	ND7:30-4:3	7:30:00AM	12:00:00PM	1:00:00PM	4:30:00PM	CST	8.00	↓
Thursday	10/02/2008	WORKDAY1-7	ND7:30-4:3	7:30:00AM	12:00:00PM	1:00:00PM	4:30:00PM	CST	8.00	↓
Friday	10/03/2008	WORKDAY1-7	ND7:30-4:3	7:30:00AM	12:00:00PM	1:00:00PM	4:30:00PM	CST	8.00	↓
Saturday	10/04/2008	WORKDAYOFF	NDOFF P	12:00:00AM			12:00:00AM	CST		
Sunday	10/05/2008	WORKDAYOFF	NDOFF P	12:00:00AM			12:00:00AM	CST		
Monday	10/06/2008	WORKDAY1-7	ND7:30-4:3	7:30:00AM	12:00:00PM	1:00:00PM	4:30:00PM	CST	8.00	↓
Tuesday	10/07/2008	WORKDAY1-7	ND7:30-4:3	7:30:00AM	12:00:00PM	1:00:00PM	4:30:00PM	CST	8.00	↓

- Click “**CANCEL**” or “**OK**” to return to the prior page.

Viewing an Employee's Absence Balances

Navigate: Manager Self Service > Time Management > View Time > Absence Balances

The following page will be displayed, listing all of the employees that report to you, and is populated automatically by the system via Position Managements "Reports To" field.

View Employee Absence Balances
Select Employee
Antonio Santos
Select an employee to view absence balances by clicking on the employee name, clicking on Search for an employee, or clicking on the chart icon to find an indirect report.

Transaction Effective Date: 10/01/2008 Go

Direct Reports For Antonio Santos				Find	First	1-5 of 5	Last
Name	EmpID	Job Title	Department				
James Fung	KU0035	Sr Consult	HR				
Jared Reddy	KU0110	DE Clerk	HR				
Jorge Menendez	KUD007	HRHD Mgr	HR				
Patricia Hunt	KUD024	Asst II	HR				
Rosa Benigo	KU0062	Jr Consult	Cust Svc				

- Change the Effective Date you are inquiring about and select "Go". Then, select the employee's name you are inquiring about.

Once you have selected the desired Employee, the next page will display the following information:

View Absence Balances
Spencer Corkum
View current absence entitlement balances. Current balances do not reflect absence requests that have not been processed by payroll. For more details please contact your absence administrator.

Absence Entitlement Balances
Current Balances

Description	Balance as of 07/31/2008	From	To	Accrual Period
Sick Leave - Standard	16.00 Hours	05/01/2008	04/30/2009	Year to Date
Annual Leave - Standard	16.00 Hours	05/01/2008	04/30/2009	Year to Date
Comp Time Balance	0.00 Hours	01/01/2008	12/31/2008	Year to Date

Go To: [Request Absence](#)
[View Absence Request History](#)
[View Monthly Calendar](#)
[Forecast Balance](#)
[Direct Reports](#)

View Monthly Time Calendar

Navigate: Manager Self Service > Time Management > Report Time > Absence Request

Request Employee Absence
Select Employee

Antonio Santos

Select an employee to initiate an absence request by clicking on the employee name, clicking on Search for an employee, or clicking on the chart icon to find an indirect report.

Transaction Effective Date:

Direct Reports For Antonio Santos				Find	First	1-5 of 5	Last
Name	EmpID	Job Title	Department				
James Fung	KU0035	Sr Consult	HR				
Jared Reddy	KU0110	DE Clerk	HR				
Jorge Menendez	KUD007	HRHD Mgr	HR				
Patricia Hunt	KUD024	Asst II	HR				
Rosa Benigo	KU0062	Jr Consult	Cust Svc				

- Select an Employee.

The following page will be displayed:

Request Absence

Jorge Menendez

Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

Absence Detail

*Start Date: [View Monthly Calendar](#)

Filter by Type:

*Absence Name:

Comments

Requestor Comments:

* Required Field

Go To: [View Absence Request History](#)
[View Absence Balances](#)
[Direct Reports](#)

- Select the hyperlink "[View Monthly Calendar](#)".

PeopleSoft HCM Absence Management Manager Self Service Guide

View Monthly Time Calendar

The following page will be displayed:

Monthly Time Calendar

View Criteria

Month: 09 - September 2008 Previous Month Next Month

Reported Hours Payable Hours

Show Schedule Show Holidays Show Planned Overtime
 Show Training Hours Show Symbols Show Exceptions
 Show Absences

View Month

Monthly Time Calendar															
Employee	Job Title	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Sun.
		01	02	03	04	05	06	07	08	09	10	11	12	13	14
Doreen Schumacher	ADMIN OFR II	HOL - 08.00	-	-	-	-	-	-	RAB - 08.00	RAB - 08.00	RAB - 08.00	-	-	-	-
		WRK - 08.00	OFF	OFF	WRK - 08.00	OFF									
Jeffrey Larshus	ACCOUNTING MANAGER I	HOL - 08.00	AAB - 08.00	AAB - 08.00	AAB - 08.00	AAB - 08.00	-	-	AAB - 04.00	-	-	-	-	-	-
		WRK - 08.00	OFF	OFF	WRK - 08.00	OFF									
Lynn Shannon-Gall	ADMIN OFR II	HOL - 08.00	-	-	-	-	-	-	-	-	-	-	-	-	-
		WRK - 08.00	OFF	OFF	WRK - 08.00	OFF									

Legend

AAB Approved Absence
 RAB Requested Absence
 HOL Holidays
 WRK Workday
OFF Off Day

- The Monthly Time Calendar will list all the employees that report to you. The calendar will show Approved Absences – AAB; Requested Absences – RAB; Holidays – HOL; and Workday – WRK, for each employee, for the entire month that the view is set for. You may change the view of the month by clicking on Previous Month, Next Month, or click on the pull down menu for the month and year, then click on “View Month.”