

# Manager Self Service Time Management Procedures

## Resources

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- c. Logging in to PeopleSoft Self Service: <http://hr.williams.edu/faculty-staff-self-service/>
- d. Link to training video for Support Staff: <http://hr.williams.edu/faculty-staff-self-service/tsheets-in-ps/>
- e. Link to training video for Students: <http://hr.williams.edu/?p=5908>

## Login and Screen Navigation:

1. Login to PeopleSoft Human Resources at [ephr.williams.edu](http://ephr.williams.edu).
  - a. Step 1: Log in to your Williams Google (email) account, e.g. abc1@williams.edu
  - b. Step 2: Log in using your Williams username (without the @williams.edu) and Williams account password
  - c. Detailed instructions for logging into PeopleSoft Self-Service can be found here: <http://hr.williams.edu/faculty-staff-self-service/>
2. For this form
  - a. **Student** = a student who is employed during academic months.
  - b. **Staff** = a non-student employed in an hourly position at the college, AND a student who is employed during the summer months.
3. Review and approve all hourly employees' time on a daily or weekly basis.
  - a. Approvers will receive bi-weekly emails reminding them to approve time.
    - i. The email will include a list of employees/students who have entered time, but not been approved.
    - ii. The email will also include those who are marked with exceptions.
  - b. **Staff time must be approved by 12:00pm on the Monday prior to payday.**
    - i. Staff pay schedule is located here: <http://wiki.williams.edu/display/handbooks/Support+Staff+Pay+Calendar>
  - c. **Student time must be approved by the end of the day Friday prior to payday.**
    - i. Student pay schedule and rates are located here: <http://hr.williams.edu/student-employment/pay/>
  - d. For punching employees and students, hours round at 7.5 minutes.
    - i. If a punching student/employee punches in at 11:37:31AM, hours will be rounded to 11:45AM.
    - ii. If a punching student/employee punches out at 4:52:31PM, hours will be rounded to 5:00PM.

## Review/Approve Reported Time:

1. Once logged into Human Resource's PeopleSoft system choose Main Menu > Manager Self Service > Time Management > Timesheet View/Edit > Timesheet.
  - a. Select the Get Employees button to generate a list of all employees that you have access to.
  - b. You can filter your search by name, job description, department number, or location and then select Get Employees.
    - i. Common search examples are below. You can search on any one of the criteria exemplified for similar results. The Look Up Value window was generated by clicking on the magnifier and then selecting Advanced Lookup.

The screenshot shows the 'Timesheet Summary' page in PeopleSoft. The 'Employee Selection Criteria' section includes fields for Time Reporter Group, Employee ID, Empl Record, Last Name (with 'bovine' entered), First Name, Job Description, Department (with '5003000' entered), Location Code, and Workgroup. A 'Look Up Location Code' dialog box is open, showing a search for 'Location Code' that begins with a blank field. The search results table is visible below the dialog.

Location Code	Description	Salary Set ID	Salary Administration Plan	Geog Location Code
1914LIBR	1914 Library	WMS01	(blank)	(blank)
1CARPNSHOP	Carpentry Shop	WMS01	(blank)	(blank)
1CNTHTGPLT	Central Heating Plant	WMS01	(blank)	(blank)
1CUSTODIAL	Custodial Office	WMS01	(blank)	(blank)

- e. The Timesheet view for *benefitted employees* displays hours reported by Time Reporting Code, Leave Time Balances, Standard Hours and Accounting Code Distribution information.

## Timesheet

Employee ID [REDACTED]  
 HR Asst Empl Record 0  
 Actions ▾ Earliest Change Date 08/21/2016

Select Another Timesheet

\*View By Calendar Period ▾ Previous Period Next Period  
 \*Date 07/24/2016 📅 ↻

Scheduled Hours 0.00 Reported Hours 80.00 [Print Timesheet](#)

From Sunday 07/24/2016 to Saturday 08/06/2016 ?

Sun 7/24	Mon 7/25	Tue 7/26	Wed 7/27	Thu 7/28	Fri 7/29	Sat 7/30	Sun 7/31
	8.00	8.00	8.00	8.00	8.00		

[Submit](#)

[Reported Time Status](#) | [Summary](#) | [Leave / Compensatory Time](#) | [Exceptions](#) | [Payable Time](#)

**Leave and Compensatory Time Balances** ? [Personalize](#) | [Find](#) | 1-3 of 3

Plan Type	Plan	Recorded Balance	Minimum Allowed	Maximum Allowed	View Detail
Leave	Sick	48.00	0	560	<a href="#">📄</a>
Leave	Vacation	18.00	0	9999	<a href="#">📄</a>
Leave	Personal	14.00	0	14	<a href="#">📄</a>

- f. The Timesheet view for *students* displays punched times.

## Timesheet

Employee ID [REDACTED]  
 Sports Info Asst Empl Record 100  
 Actions ▾ Earliest Change Date 06/03/2016

Select Another Timesheet

\*View By Calendar Period ▾ Previous Period Next Period  
 \*Date 05/06/2016 📅 ↻ Previous Employee Next Employee

Reported Hours 9.66

From 05/06/2016 to 05/19/2016 ?

Add Comments	Day	Date	Status	Exception	In	Out	Punch Total	Date		
🗨	Fri	5/6	New					5/6	<a href="#">+</a>	<a href="#">-</a>
🗨	Sat	5/7	New					5/7	<a href="#">+</a>	<a href="#">-</a>
🗨	Sun	5/8	New					5/8	<a href="#">+</a>	<a href="#">-</a>
🗨	Mon	5/9	Approved		5:00:00PM	7:00:00PM	2.00	5/9	<a href="#">+</a>	<a href="#">-</a>
🗨	Tue	5/10	Approved		7:00:00PM	8:40:00PM	1.66	5/10	<a href="#">+</a>	<a href="#">-</a>
🗨	Wed	5/11	Approved		5:30:00PM	7:30:00PM	2.00	5/11	<a href="#">+</a>	<a href="#">-</a>
🗨	Thu	5/12	Approved		6:00:00PM	8:30:00PM	2.50	5/12	<a href="#">+</a>	<a href="#">-</a>
🗨	Fri	5/13	Approved		6:00:00PM	7:30:00PM	1.50	5/13	<a href="#">+</a>	<a href="#">-</a>
🗨	Sat	5/14	New					5/14	<a href="#">+</a>	<a href="#">-</a>
🗨	Sun	5/15	New					5/15	<a href="#">+</a>	<a href="#">-</a>
🗨	Mon	5/16	New					5/16	<a href="#">+</a>	<a href="#">-</a>

- g. To access Accounting Code Distribution and Standard Hours right click on the Employee ID and select Job Information. A detail window will appear at the bottom of your screen.

Favorites Main Menu > Manager Self Service > Time Management > Report Time > Timesheet

### Timesheet

**Violet Bovine** Employee ID: 1682854  
 Job Title: HR Asst Empl Record: 0

\*View By: Week Reported Hours: 35.00  
 \*Date: 09/08/2013 Scheduled Hours: 0.00

From Sunday 09/08/2013 to Saturday 09/14/2013

Sun 9/8	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12	Fri 9/13	Sat 9/14	Total Hours	Time Reporting Code
	7.00	7.00	7.00	7.00			28.00	REG - Support Staff Regular
					7.00		7.00	S - Sick Leave

Submit

Reported Time Status

Select	Date	Reported Status	Approval Monitor	Total	TRC	Description	Sched Hrs	Comments
<input type="checkbox"/>	09/09/2013	Needs Approval	Approval Monitor	7.00	REG	Support Staff Regular	0.00	

Standard Hrs / Week: 35.00

Combination Code	Description	Percent of Distribution
501310.110.5003000.	Human Resources-Clerical	100.00%

- h. While reviewing reported time please bring any issues to the employee's attention and ask the employee to adjust the hours accordingly.

2. Approve Reported Time:

- a. To approve hours by day click on the box in the "Select" column under Reported Time Status and then click Approve.

**Violet Bovine** Employee ID: 1683706  
 HR Asst Empl Record: 0  
 Earliest Change Date: 07/01/2016

Select Another Timesheet

\*View By: Calendar Period  
 \*Date: 08/07/2016  
 Scheduled Hours: 0.00 Reported Hours: 40.00

From Sunday 08/07/2016 to Saturday 08/20/2016

Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10	Thu 8/11	Fri 8/12	Sat 8/13	Sun 8/14	Mon 8/15	Tue 8/16
		8.00	8.00		8.00				
				8.00					
	8.00								

Reported Time Status Summary Exceptions Payable Time

Reported Time Status

Select	Date	Reported Status	Total	TRC	Description	Sched Hrs	Add Comments
<input checked="" type="checkbox"/>	08/08/2016	Needs Approval	8.00	V	Vacation Leave	0.00	
<input type="checkbox"/>	08/09/2016	Needs Approval	8.00	REG	Support Staff Regular	0.00	
<input type="checkbox"/>	08/10/2016	Needs Approval	8.00	REG	Support Staff Regular	0.00	
<input type="checkbox"/>	08/11/2016	Needs Approval	8.00	S	Sick Leave	0.00	
<input type="checkbox"/>	08/12/2016	Needs Approval	8.00	REG	Support Staff Regular	0.00	

Approval

Select All Deselect All Approve

b. To approve all hours on the Timesheet choose Select All and then Approve under Reported Time Status.

Violet Bovine

Employee ID 1683706

HR Asst

Empl Record 0

Actions

Earliest Change Date 09/04/2016

Select Another Timesheet

\*View By Week

Previous Week

Next Week

\*Date 08/07/2016

Previous Employee

Next Employee

Scheduled Hours 0.00

Reported Hours 40.00

Print Timesheet

From Sunday 08/07/2016 to Saturday 08/13/2016

Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10	Thu 8/11	Fri 8/12	Sat 8/13	Total	Time Reporting Code
		8.00	8.00		8.00		24.00	REG - Support Staff Regular
				8.00			8.00	S - Sick Leave
	8.00						8.00	V - Vacation Leave

Submit

Reported Time Status Summary Exceptions Payable Time

Reported Time Status

Personalize | Find | 1-5 of 5

Select	Date	Reported Status	Total	TRC	Description	Sched Hrs	Add Comments
<input type="checkbox"/>	08/08/2016	Needs Approval	8.00	V	Vacation Leave	0.00	
<input type="checkbox"/>	08/09/2016	Needs Approval	8.00	REG	Support Staff Regular	0.00	
<input type="checkbox"/>	08/10/2016	Needs Approval	8.00	REG	Support Staff Regular	0.00	
<input type="checkbox"/>	08/11/2016	Needs Approval	8.00	S	Sick Leave	0.00	
<input type="checkbox"/>	08/12/2016	Needs Approval	8.00	REG	Support Staff Regular	0.00	

Approval

Select All


Deselect All

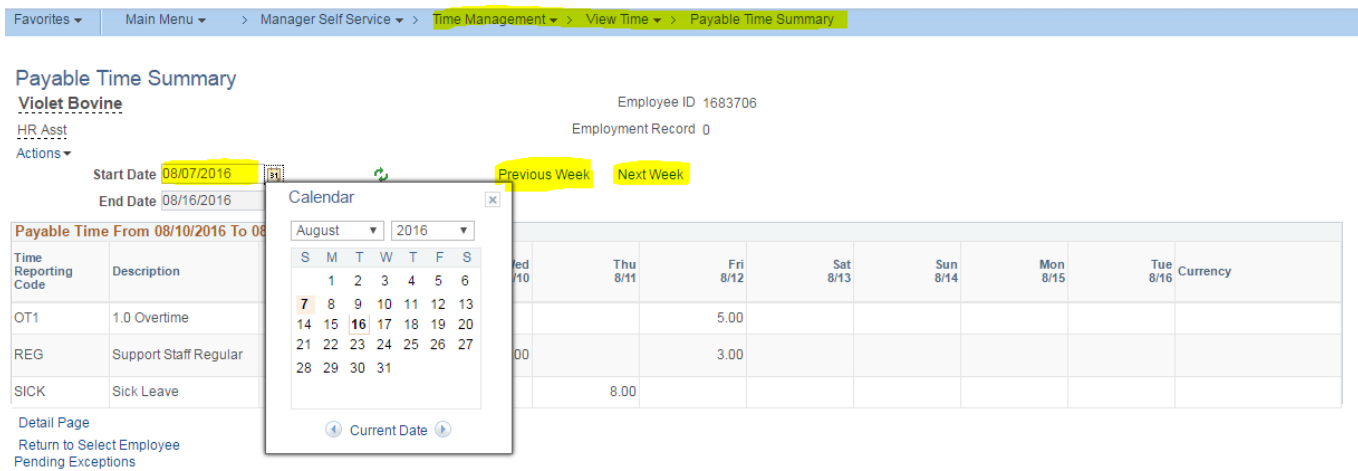
Approve

Notice the Next Employee, Previous Employee, Previous Week and Next Week options toward the top of the Timesheet view. This allows you to scroll through all of your employees as well as historical reported hours.

## Reviewing Payable Time and Exceptions

Every three hours a process runs to move approved Timesheet data (Reported Time) to Payable Time, create exceptions when there is an error on a Timesheet, and generate Overtime where necessary.

1. Payable time can be reviewed by selecting  
Main Menu > Manager Self Service > Time Management > View Time > Payable Time Summary.
  - a. Select the Get Employees button to generate a list of all employees that you have access to.
    - i. Optionally you can enter search criteria to filter on specific employees/students and then select Get Employees.
  - b. Click on the Employee you want to view and select a week beginning date by clicking on the calendar symbol  , as shown below



Payable Time Summary  
Violet Bovine  
HR Asst  
Actions

Employee ID 1683706  
Employment Record 0

Start Date 08/07/2016  
End Date 08/16/2016

Calendar

August 2016

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	31			

Previous Week Next Week

Wed 8/10	Thu 8/11	Fri 8/12	Sat 8/13	Sun 8/14	Mon 8/15	Tue 8/16	Currency
		5.00					
00		3.00					
	8.00						

Detail Page  
Return to Select Employee  
Pending Exceptions

2. **Staff exceptions** will generate if an employee overdraws vacation, sick or personal time, when the employee enters a long shift, or when the employee did not enter hours equaling or exceeding their standard hours in the prior week (*picture on next page*).
3. **Student exceptions** will generate if the student misses a punch, works more than 5 hours in a shift or edits a punch on the TimeSheet.
  - a. Exceptions can be viewed by:
    - i. Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Exceptions. Click Get Employees.
    - ii. Exceptions can also be viewed on the Timesheet, if you click on the Alarm Clock you will be brought to the Exceptions screen.

## Timesheet

**Violet Bovine**

Employee ID 1683706

HR Asst

Empl Record 0

Actions

Earliest Change Date 08/21/2016

Select Another Timesheet

\*View By Week

Previous Week Next Week

\*Date 08/07/2016

Scheduled Hours 0.00

Reported Hours 40.00

Print Timesheet

From Sunday 08/07/2016 to Saturday 08/13/2016

Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10	Thu 8/11	Fri 8/12	Sat 8/13	Total	Time Reporting Code
		8.00	8.00		8.00		24.00	REG - Support Staff Regular
				8.00			8.00	S - Sick Leave
	8.00						8.00	V - Vacation Leave

Submit

Reported Time Status Summary Exceptions Payable Time

Reported Time Status

Personalize | Find | 1-5 of 5

Date	Reported Status	Total	TRC	Description	Sched Hrs	Add Comments	Exception
08/08/2016	Approved	8.00	V	Vacation Leave	0.00		
08/09/2016	Approved	8.00	REG	Support Staff Regular	0.00		
08/10/2016	Approved	8.00	REG	Support Staff Regular	0.00		
08/11/2016	Approved	8.00	S	Sick Leave	0.00		
08/12/2016	Approved	8.00	REG	Support Staff Regular	0.00		

**Violet Bovine**

Employee ID 1683706

HR Asst

Empl Record 0

Actions

Earliest Change Date 08/21/2016

Select Another Timesheet

\*View By Week

Previous Week Next Week

\*Date 08/07/2016

Scheduled Hours 0.00

Reported Hours 40.00

Print Timesheet

From Sunday 08/07/2016 to Saturday 08/13/2016

Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10	Thu 8/11	Fri 8/12	Sat 8/13	Total	Time Reporting Code
		8.00	8.00		8.00		24.00	REG - Support Staff Regular
				8.00			8.00	S - Sick Leave
	8.00						8.00	V - Vacation Leave

Submit

Reported Time Status Summary Exceptions Payable Time

Exceptions

Personalize | Find | 1-2 of 2

Allow	Date	Exception ID	Exception Source	Status	Exception Severity	Explanation	Comment
<input type="checkbox"/>	08/08/2016	TLX00010	Time Administration	Unresolved	Medium	Leave Time Error 2.	
<input type="checkbox"/>	08/11/2016	TLX00010	Time Administration	Unresolved	Medium	Leave Time Error 2.	

Select All

Deselect All

Update Exception

- b. You can allow the exception by clicking in the Allow box and then Update Exeption, otherwise please ask the employee to correct the time entered.

4. **Each week** make sure that you have approved all time entered by navigating to Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time.
  - a. Using the drop down box select View By: All Time Before to generate a list of all employee hours that have not yet been approved.
  - b. Click on employee name, to open the Timesheet for review and approval. You can navigate through all employees on the list by clicking on Next Employee.
  - c. If you have a lot of employees/students to approve you can approve all on the employee list as displayed below saving many clicks on individual timesheets. You should complete approval in this way after you have reviewed all timesheets for accuracy.

Favorites | Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time

Approve Reported Time

### Timesheet Summary

Employee Selection Criteria

Description	Value
Time Reporter Group	WCALL
Empl ID	
Empl Record	
Last Name	bovine
First Name	
Job Description	
Department	
Location Code	
Workgroup	

Select an employee and select the Approve or Deny button below to approve or deny the employee's time, then select the employee's name in the Name column to view, approve and/or deny the employee's time. You may select different view by options - by week, by date, all time before or all time after the specified date.

View By: All Time Before  Show Schedule Information

Date: 08/05/2014

Employees For Christa Waryas, Time Needing Approval Before 08/05/2014								Personalize	Find	First	1-2 of 2	Last
Select	Name	Job Description	Hours to be Approved	Employee ID	Empl Record	Department Description	Workgroup	Location Code				
<input type="checkbox"/>	<a href="#">Violet Bovine</a>	Wms Stu Peer Tutor	0.00	1508186	101	Academic Resources(Stu)	WCST	PRSKY0202				
<input type="checkbox"/>	<a href="#">Violet Bovine</a>	Wms Stu Photographer	8.01	1508186	104	Office of Student Life(Stu)	WCST	PRSKY0205				

## Administrative Staff Vacation and Sick Leave Reporting

Administrative staff should report vacation and sick leave usage in PeopleSoft Self-Service Time Reporting. Vacation and Sick Leave entered by Administrative Staff does not need supervisory approval.

For detailed instructions and more information, please watch this [Video Tutorial](#), and consult our updated [Vacation Leave Policy](#) and [Sick Leave Policy](#).



## **Resources**

- a. Christa Waryas, Payroll Systems Manager, ext. 4479 or [Christa.A.Waryas@williams.edu](mailto:Christa.A.Waryas@williams.edu)
- b. Carol Rand, Payroll Specialist, ext. 4162 or [Carol.B.Rand@williams.edu](mailto:Carol.B.Rand@williams.edu)
- c. Logging in to PeopleSoft Self Service: <http://hr.williams.edu/faculty-staff-self-service/>
- d. Link to training video for Support Staff: <http://hr.williams.edu/faculty-staff-self-service/tsheets-in-ps/>
- e. Link to training video for Students: <http://hr.williams.edu/?p=5908>