

Manager Self Service Time Management Procedures

Resources

- a. Amy Russell, Payroll Systems Manager, ext. 4479 or arr2@williams.edu
- b. Carol Rand, Payroll Specialist, ext. 4162 or Carol.B.Rand@williams.edu
- c. Katie Hamilton, Payroll Assistant, ext. 2849 or kah9@williams.edu
- d. Logging in to PeopleSoft Self Service: <http://hr.williams.edu/faculty-staff-self-service/>
- e. Link to training video for Support Staff: <http://hr.williams.edu/faculty-staff-self-service/tsheets-in-ps/>
- f. 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.
 - 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 the PeopleSoft system. The breadcrumb trail at the top is: Favorites > Main Menu > Manager Self Service > Time Management > Timesheet View / Edit > Timesheet. The page title is 'Report Time Timesheet Summary'. Under the 'Employee Selection' section, the 'Employee Selection Criteria' table has the following values: Time Reporter Group (blank), Employee ID (blank), Empl Record (blank), Last Name (bovine), First Name (blank), Job Description (blank), Department (5003000), Location Code (blank), and Workgroup (blank). To the right of this table are buttons for 'Get Employees', 'Clear Criteria', and 'Save Criteria'. Below the criteria table is a 'Change View' section with '*View By' set to 'Week' and a date of '08/16/2016'. The main table is titled 'Employees For Carol Rand, Totals From 08/14/2016 - 08/20/2016' and has tabs for 'Time Summary' and 'Demographics'. The 'Time Summary' tab is active, showing a table with columns: Last Name, First Name, Employee ID, Empl Record, and Job Title. The first row shows 'Last Name' and 'First Name' as 'Last Name' and 'First Name' respectively, with 'Employee ID' as '0'. A 'Look Up Location Code' dialog box is open over the 'Location Code' field. It has a 'Search by' dropdown set to 'Location Code' and a 'begins with' field. Below the search field are buttons for 'Look Up', 'Cancel', and 'Advanced Lookup'. The 'Look Up' button is highlighted. The 'Search Results' section shows a table with columns: Location Code, Description, Salary Set ID, Salary Administration Plan, and Geog Location Code. The results are: 1914LIBR (1914 Library, WMS01 (blank), (blank)), 1CARPNSHOP (Carpentry Shop, WMS01 (blank), (blank)), 1CNTHTGPLT (Central Heating Plant, WMS01 (blank), (blank)), and 1CUSTODIAL (Custodial Office, WMS01 (blank), (blank)).

Selection Criterion	Selection Criterion Value
Time Reporter Group	
Employee ID	
Empl Record	
Last Name	bovine
First Name	
Job Description	
Department	5003000
Location Code	
Workgroup	

Location Code	Description	Salary Set ID	Salary Administration Plan	Geog Location Code
1914LIBR	1914 Library	WMS01 (blank)	(blank)	(blank)
1CARPNSHOP	Carpentry Shop	WMS01 (blank)	(blank)	(blank)
1CNTHTGPLT	Central Heating Plant	WMS01 (blank)	(blank)	(blank)
1CUSTODIAL	Custodial Office	WMS01 (blank)	(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	📄
Leave	Vacation	18.00	0	9999	📄
Leave	Personal	14.00	0	14	📄

- 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	+	-
🗨	Sat	5/7	New					5/7	+	-
🗨	Sun	5/8	New					5/8	+	-
🗨	Mon	5/9	Approved		5:00:00PM	7:00:00PM	2.00	5/9	+	-
🗨	Tue	5/10	Approved		7:00:00PM	8:40:00PM	1.66	5/10	+	-
🗨	Wed	5/11	Approved		5:30:00PM	7:30:00PM	2.00	5/11	+	-
🗨	Thu	5/12	Approved		6:00:00PM	8:30:00PM	2.50	5/12	+	-
🗨	Fri	5/13	Approved		6:00:00PM	7:30:00PM	1.50	5/13	+	-
🗨	Sat	5/14	New					5/14	+	-
🗨	Sun	5/15	New					5/15	+	-
🗨	Mon	5/16	New					5/16	+	-

- 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 *Date: 09/08/2013

Reported Hours: 35.00 Scheduled Hours: 0.00

Previous Week Next Week

Next Employee

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	

Related Content

Standard Hrs / Week: 35.00

Combination Code	Description	Percent of Distribution
501310.110.5003000.	Human Resources-Clerical	100.000

- 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
Job Title: HR Asst Empl Record: 0
Earliest Change Date: 07/01/2016

Actions

Select Another Timesheet

*View By: Calendar Period *Date: 08/07/2016

Scheduled Hours: 0.00 Reported Hours: 40.00

Previous Period Next Period

Print Timesheet

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								

Submit

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.

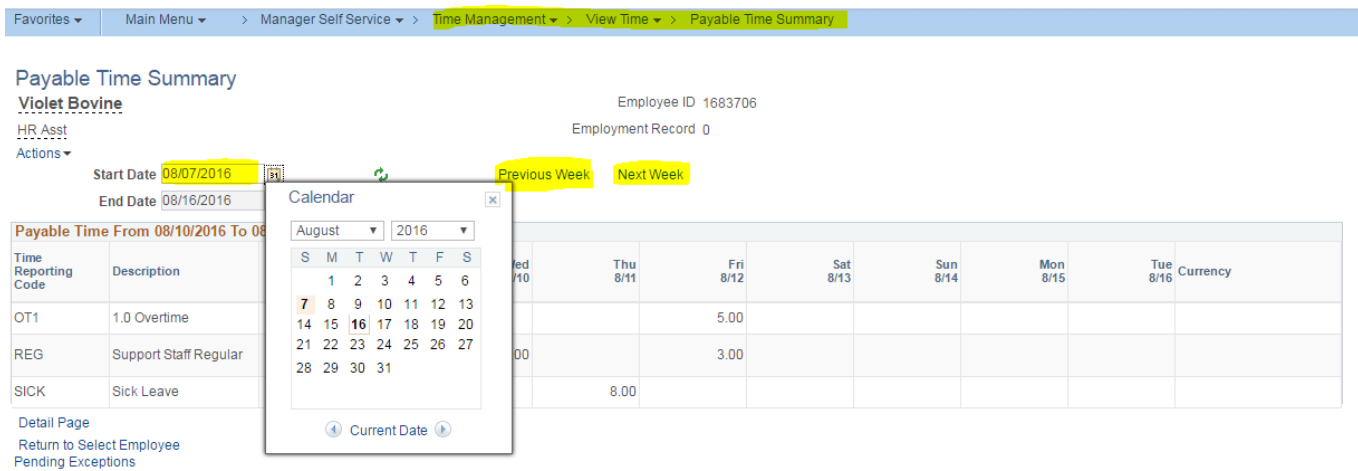
Reviewing Payable Time and Exceptions

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

Employee ID 1683706

HR Asst

Actions

Start Date 08/07/2016

End Date 08/16/2016

Previous Week

Next Week

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

Current Date

Time Reporting Code	Description	Currency
OT1	1.0 Overtime	5.00
REG	Support Staff Regular	3.00
SICK	Sick Leave	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

HR Asst

Actions

Employee ID 1683706

Empl Record 0

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

HR Asst

Actions

Employee ID 1683706

Empl Record 0

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.
- 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.
 - 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.
 - 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

Employee Selection Criteria ?

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

Clear Selection Criteria Save Selection Criteria Get Employees

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"/>	Violet Bovine	Wms Stu Peer Tutor	0.00	1508186	101	Academic Resources(Stu)	WCST	PRSKY0202				
<input type="checkbox"/>	Violet Bovine	Wms Stu Photographer	8.01	1508186	104	Office of Student Life(Stu)	WCST	PRSKY0205				

Select All Deselect All

Approve

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. Amy Russell, Payroll Systems Manager, ext. 4479 or arr2@williams.edu
- b. Carol Rand, Payroll Specialist, ext. 4162 or Carol.B.Rand@williams.edu
- c. Katie Hamilton, Payroll Assistant, ext. 2849 or kah9@williams.edu
- d. Logging in to PeopleSoft Self Service: <http://hr.williams.edu/faculty-staff-self-service/>
- e. Link to training video for Support Staff: <http://hr.williams.edu/faculty-staff-self-service/tsheets-in-ps/>
- f. Link to training video for Students: <http://hr.williams.edu/?p=5908>