BUSINESS PROCESS GUIDE

PEOPLESOFT
HUMAN CAPITAL MANAGEMENT
Release 9.2

Department Time Administrator

For Department Managers and DTAs

February 2015

Arizona State University

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PROCESS OVERVIEW

This guide is for users in a department who are responsible for approving employee's timesheets. The types of time that may need to be approved include hourly, vacation, compensatory and sick time. You can either be a *department time administrator* or a *manager* in the department (depending on how your business is set up).

In order to use the screens shown in this guide, you must have the PeopleSoft role of:
HCM Dept Time Administrator

NOTE: if you have employees that report to you, you should have the role of HCM Dept Pay Manager.

It is important to be aware of the various deadlines that are shown in the ***Payroll Calendar*** http://cfo.asu.edu/fs-payroll

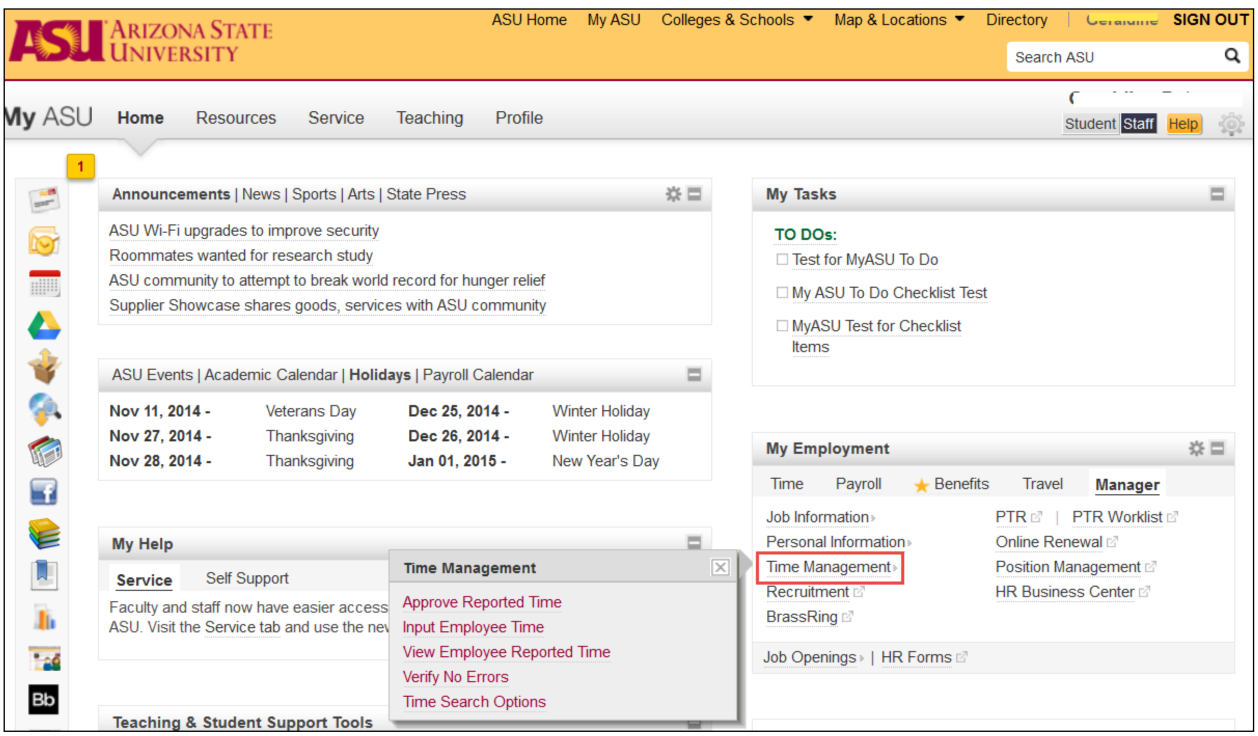
Accessing Time and Labor Screens via My ASU

Open a web browser

- Go to www.asu.edu.
- Click on "**My ASU**"
- Login with your **ASURITE ID** and **Password**.
- Click on "**Manager**" tab,
- Click on "**Time Management**"

There are several choices to view and edit time and leave reporting - additional information is shown if you click on the verbiage:

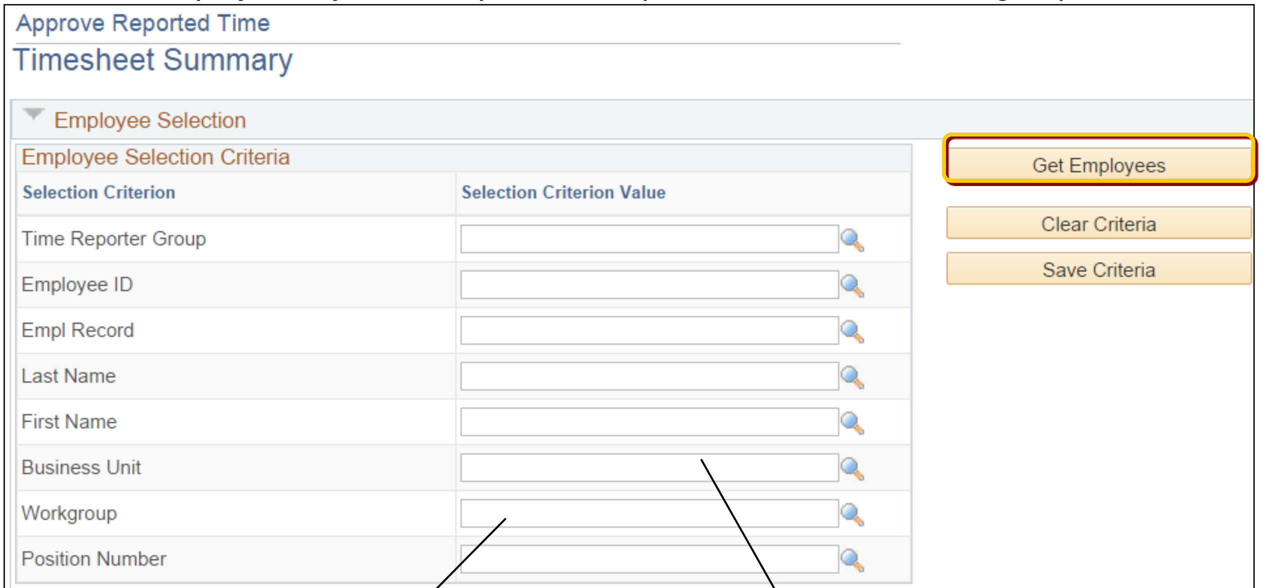
- **Approve Reported Time** – See all employees –View individual timesheets, view details
- **Input Employee Time** – See which employees have hours that need to be approved. Approve all at once.
- **View Employee Reported Time** – See hours put in by all of your employees at once glance
- **Verify No Errors**
- **Time Search Options**



To Approve, Enter, and View Employees via Time Sheet

You can search for your employees in several ways:

- Employee ID
- List Employees by Time Reporter Group, Business Unit or Workgroup



Workgroup	Description
ACBEN	Academic Benefit Eligible
ACDNOB	Academic Non-Benefit Eligible
HBEN	Hourly Benefit Eligible
HNOB	Hourly Non-Benefit Eligible
SBEN	Salaried Benefit Eligible
SNOB	Salaried Non-Benefit Eligible
STU	Students

Business Unit	Description
A0101	A - President's Office
B0101	B - Provost Tempe
C0101	C - Public Affairs
D0101	D - Business & Finance
E0101	E - Research
F0101	F - Student Affairs
G0101	G - West
H0101	H - Board of Regents
I0101	I - Polytechnic
J0101	J - Intercollegiate Athletics
L0101	L - Student Initiatives

Show lists of employees

You can use the fields: *Time Reporter Group, Business Unit* and/or *Workgroup* to show you a list of employees that you have access to as a DTA, based on your security.

For example, you want to view Students in the Downtown Phx area. You would click on the **Look Up icon** (**Magnifying glass**) and choose L0101 L – Students Initiatives and STU for Students:

Workgroup: *Students*
Business Unit: *L0101*

Note: An employee's workgroup dictates which Time Reporting Codes (TRC's) are available for them to report

Show one employee

You can search for a single employee: *Employee ID* (10 digit number, beginning with 1000 or 1200), *First Name, Last Name* and/or *Position number*. **Note: Capitalize the first letter of the name fields.**

Once you have set your search criteria, click on "**Get Employees**" button.

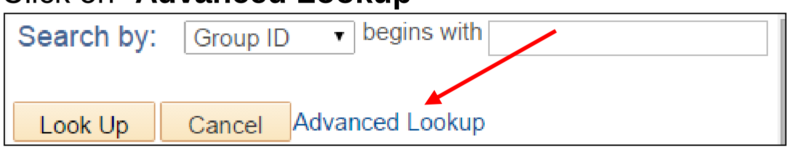
Search by Time Reporter Group:

Depending on your circumstance, the employees you approve time for may all report into a group.

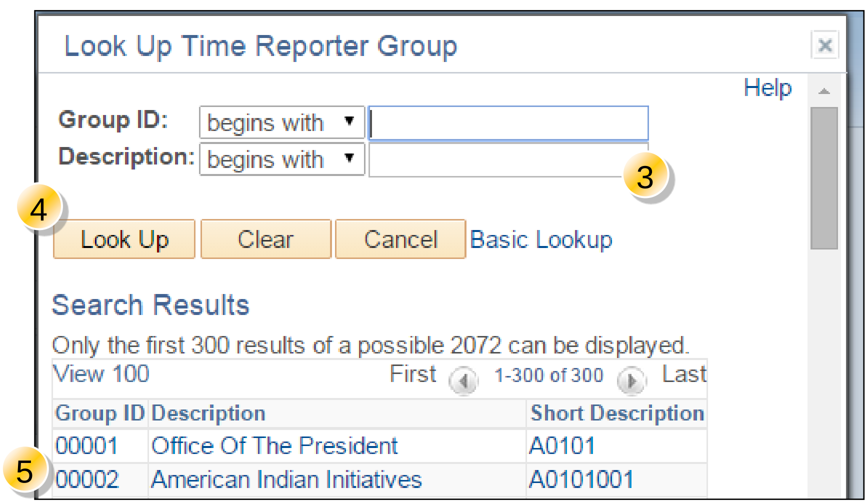
To find your group ID – follow these steps:

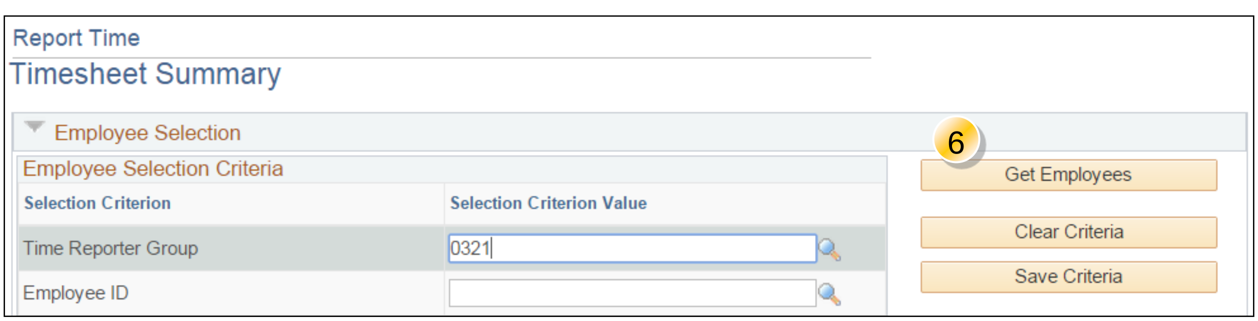
1) Click on the **magnifying glass** next to the "Time Reporter Group" field"

2) Click on "**Advanced Lookup**"



3) Type in a word that you think may be in your group's **Description**.
4) Click "**Look Up**"
5) Click directly to the Group ID number
6) Click "**Get Employees**" button to list the employees you need to approve time for.

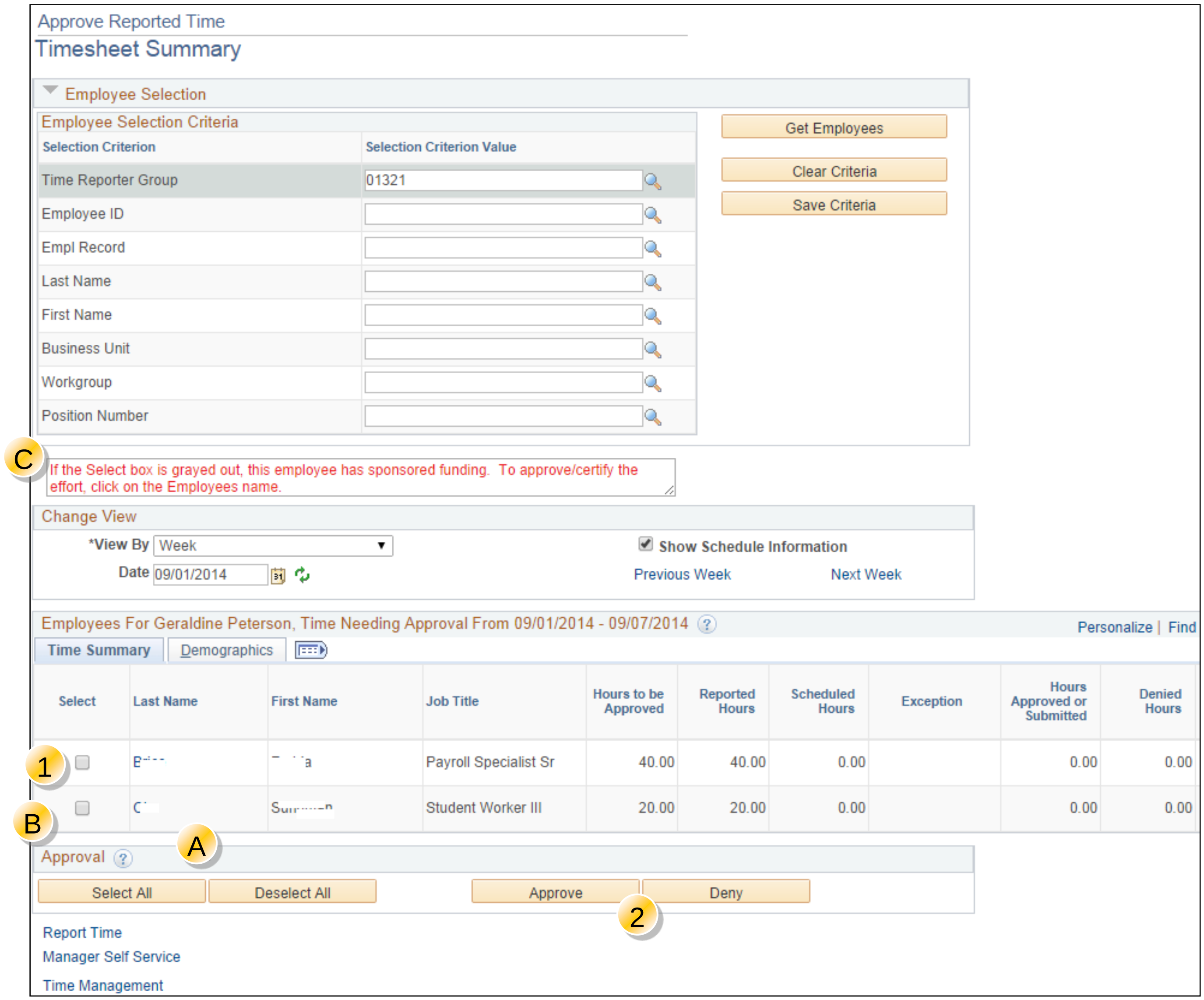




Approve Employees' Time via Reported Time Screen

There are a couple of different ways to approve employee's time. It is best practice to review each employee's time detail so you can ensure that the right time reporting code was used.

This is an example of the "Reported Time" screen.



From here, you can approve hours of one or more employees.

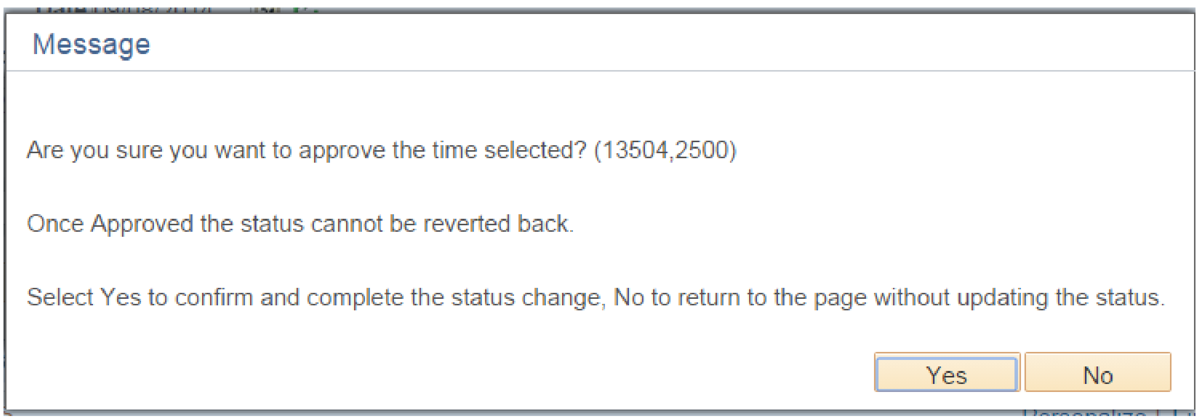
1) Click on the **check boxes** next to the employees whom you want to approve and
2) Click on "**Approve**" or "**Deny**". All entries for selected employees will be approved or denied.

Best Practices

Tip A: You can go one level deeper by clicking on an employee's last name and then approving or denying individual entries. See below for further directions.

Tip B: If the selection box is grayed out, but there are hours to approve, the employee has effort reporting hours. You must approve them on the detail screen by clicking on the employee's name.

Tip C: If you have navigated to a time period in the past, you will see this message. It warns you that you are dealing with data in the past and that the employee's pay will be affected by your changes if the changes are made within 112 days (previous 8 pay periods). If a time adjustment is needed after 112 days (previous 8 pay periods) a PAR will need to be submitted to payroll. (See Making Timesheet Adjustments)



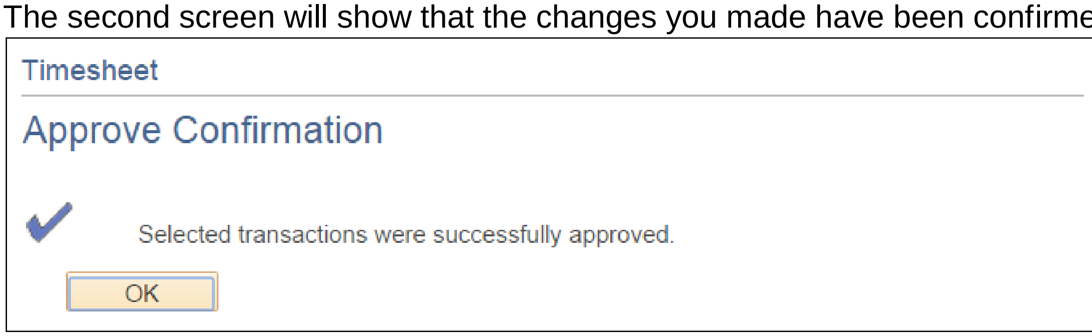
Note: Remove any zero (0) hours reported as this will create a "High Severity Exception". Contact your payroll representative for further assistance.

Once you click on "approve selected" or "deny selected" you will see two more screens.

The first screen allows you to cancel if you made a mistake.

Click **Yes** to continue.

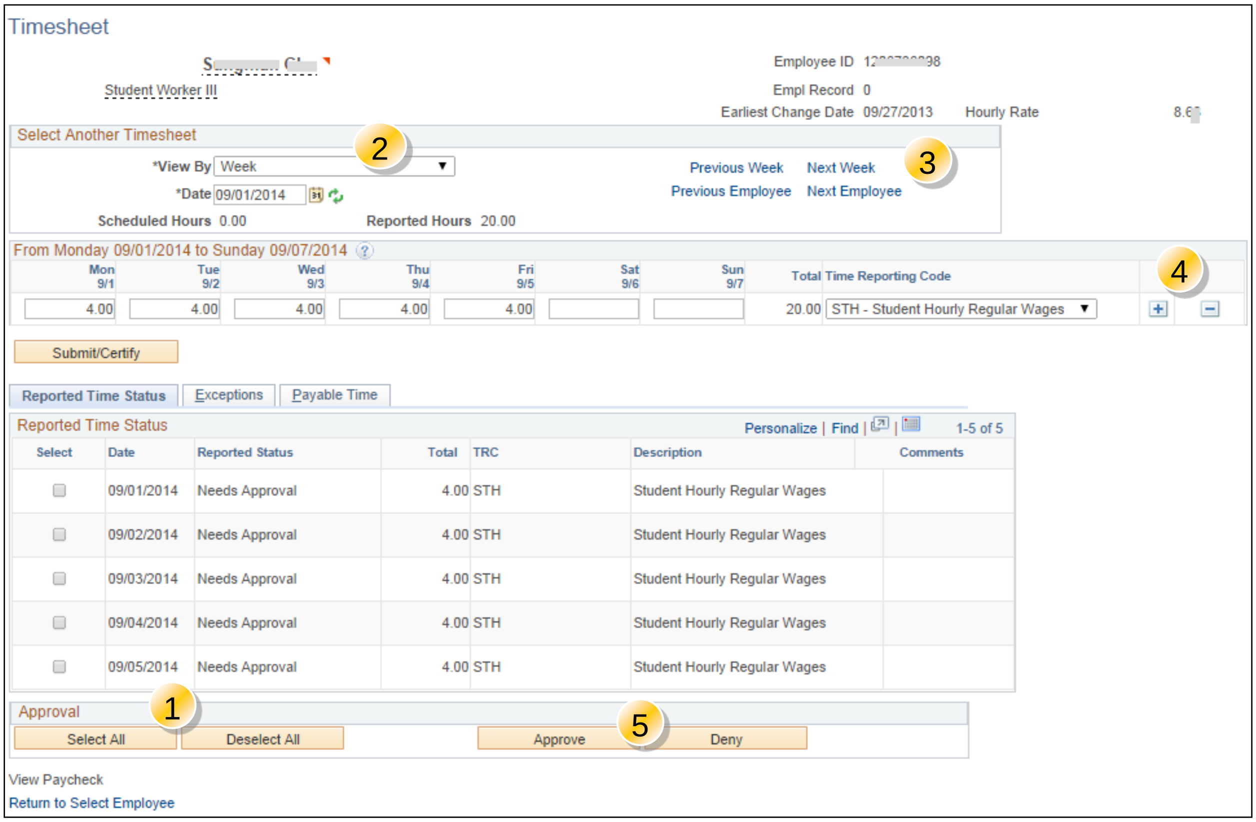
The second screen will show that the changes you made have been confirmed.



Click **OK** to confirm

Approve, Deny, Edit, Add or Delete Time for an Employee

When you click on an employee's name, you can then approve or deny individual entries in their record.



The steps involved include:

Step 1: Use the "Select All" and "Deselect All" to mass select/unselect entries.

Step 2: Use the "view by" and "Date" features to change the time frame.
Typically, you will view by *calendar period* (2 week intervals).
If you navigate to a previous pay period, a warning message will appear.

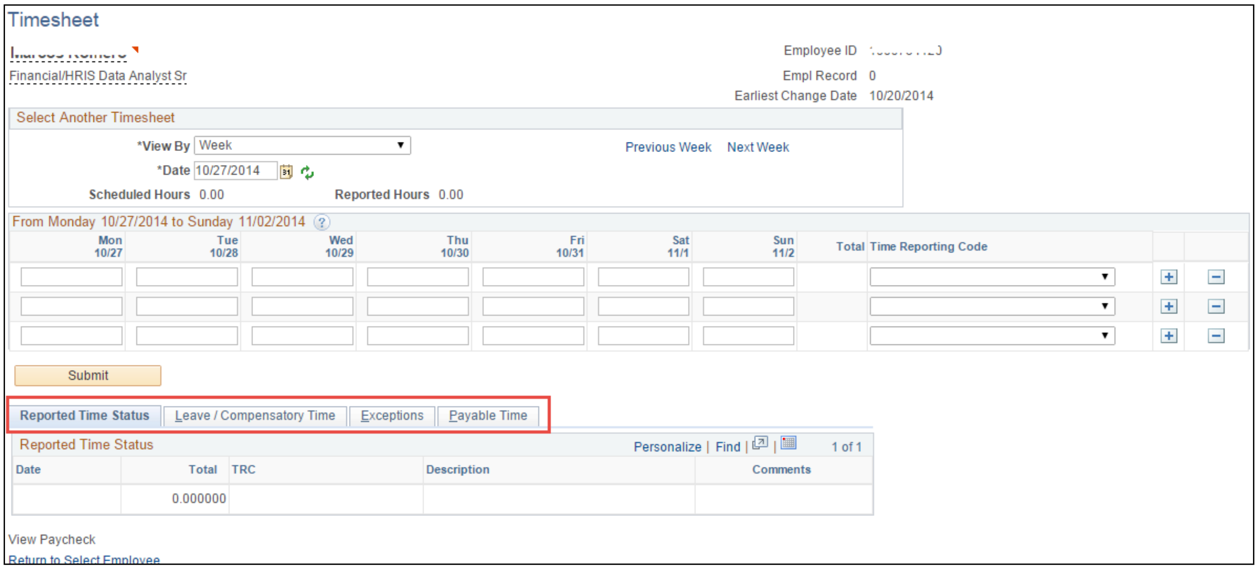
Step 3: Use these links to quickly jump to new time periods and/or a different employee.

Step 4: If your security access and business process allows, you may have the ability to add and edit hours to the employee's record.

If the new hours are of a different TRC -Time Reporting Code (for example, vacation instead of regular)

Click the **+** sign at the right end of the last row to add a new row of data.
Enter the **number of hours** and click on the **drop box** for **Total Time Reporting Code** to choose the correct TRC. Remove incorrect entry. **Do not** enter zero (0) to the employee timesheet as this will create a "High Severity Exception".
Click on "**Submit/Certify**".

Step 5: Approve or **Deny** the hours by clicking these buttons



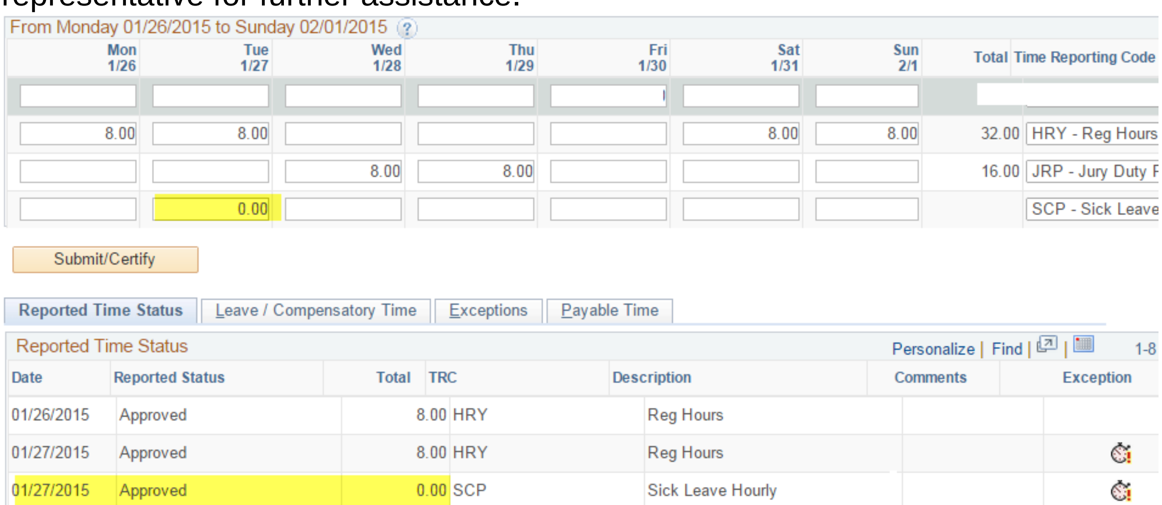
Tabs at the bottom of the Timesheet:

Reported Time Status tab – shows the hours that needs DTA approval

Leave/Compensatory Time tab (applies to Benefit Eligible employees) – shows different types of leave plan and the corresponding balance that is available to use

Exceptions tab – shows the hours that have a status of Unresolved. Exceptions that have "**Low**" or "**Medium**" severity can be process within the department.

High" severity exception needs to be researched. The most common high severity exception is a zero entered on the employee timesheet, as seen below. Best practice is to inform your employees to leave it blank if there are no hours to report for a day. Contact your payroll representative for further assistance.

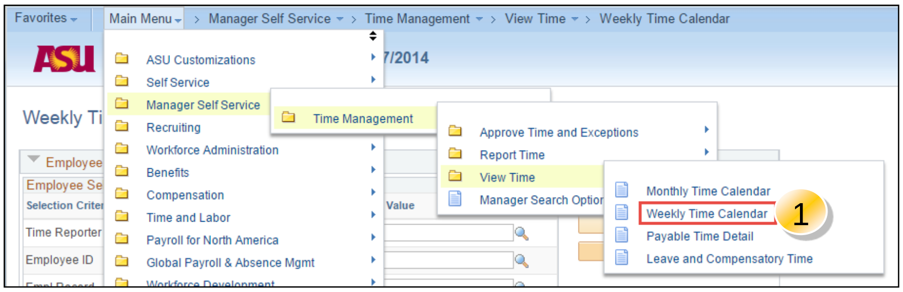


Payable Time tab – shows hours with different payable statuses: Estimated, Rejected, Paid etc…depending upon the timing of when payroll confirms.

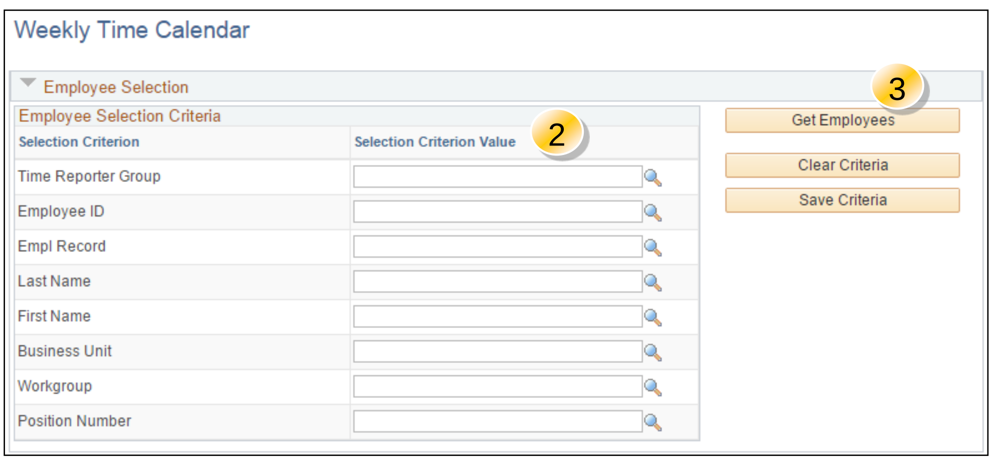
Weekly Time Calendar View

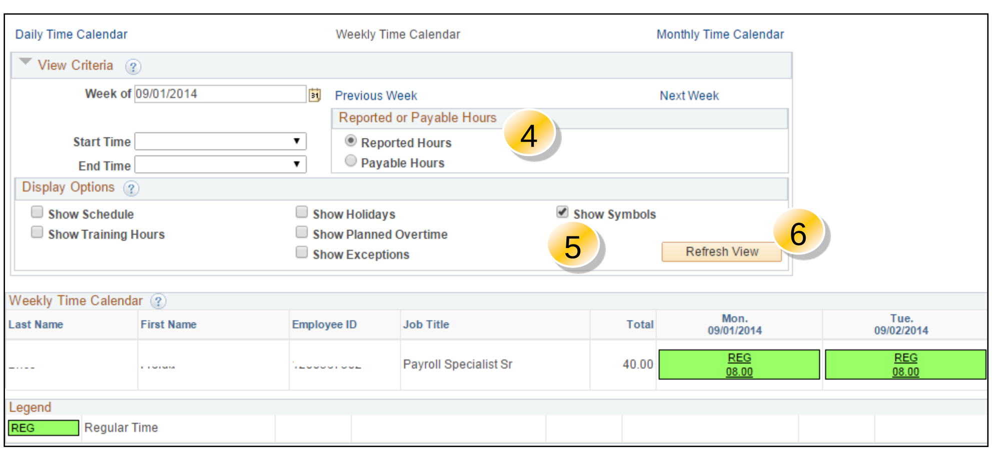
Reported Hours

1. Click on the **Weekly Time Calendar** view in the View Time menu



2. Look up your employee using their ID # or criteria of your choice.
3. Click **Get Employees**
4. Click on the radial button titled **Reported Hours**
5. Click a checkmark into the **Show Symbols** area. This will color code the various types of pay an individual has generated. Eg. REG hours are green.
6. Click on the **Refresh View** button to bring up Reported Hours.

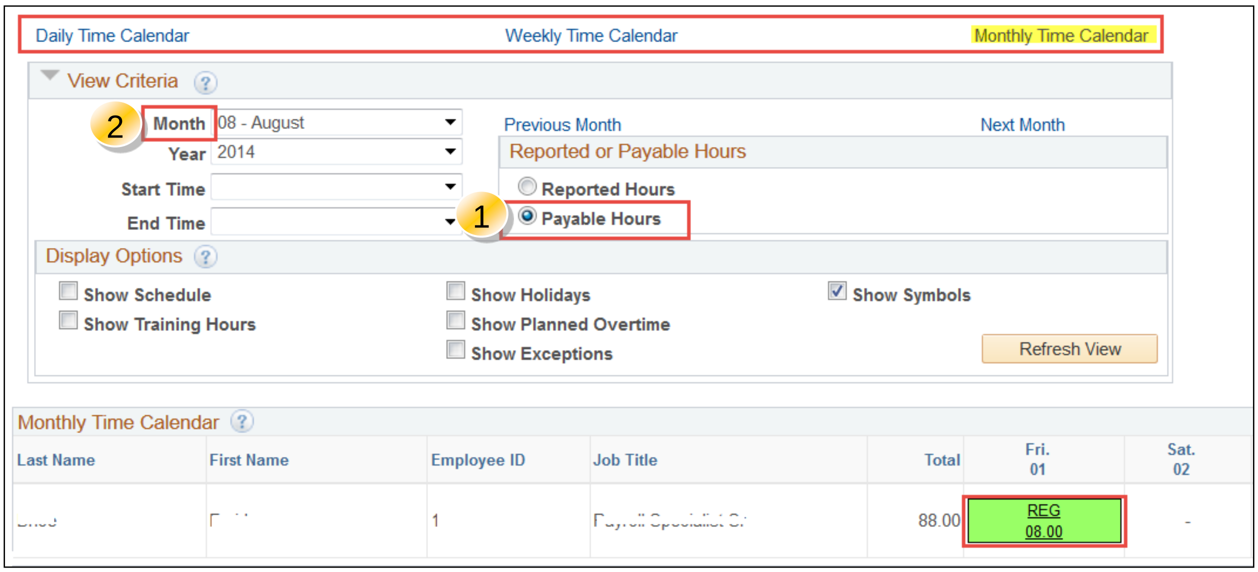




Payable Hours

1. Click on the Payable Hours radial button
2. Click on the View Month button

Note: The Monthly, Daily and Payable Time Details views are useful as well.
Note: Click on the hours links to view details about them.



The Payable Hours view in the system show the quantity of hours for which the person will be paid. It reflects all adjustments made by the system. Employees can see this view.

Some additional codes; in the PAYABLE time when reviewing/calculating employees hours;

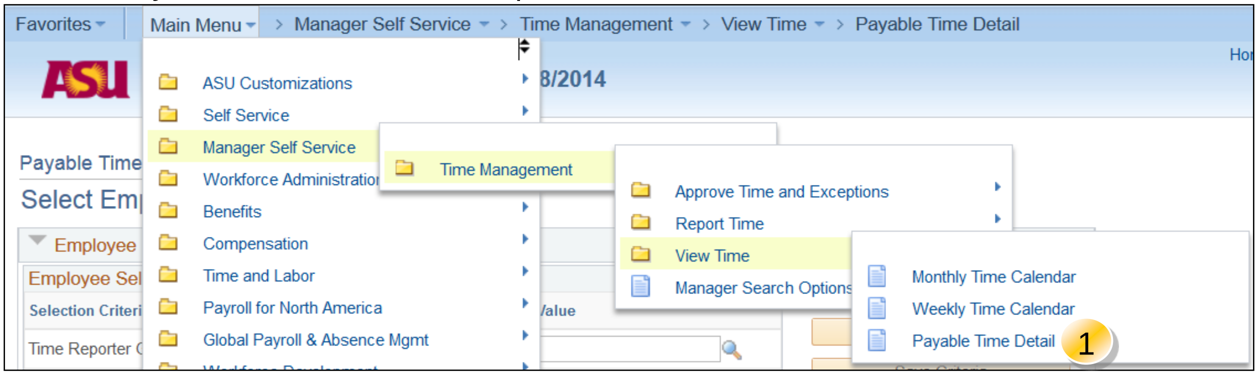
HOP = holiday pay

CEP = comp time paid, this is the hours IE: 2.75 paid at straight

CTE = comp time earned

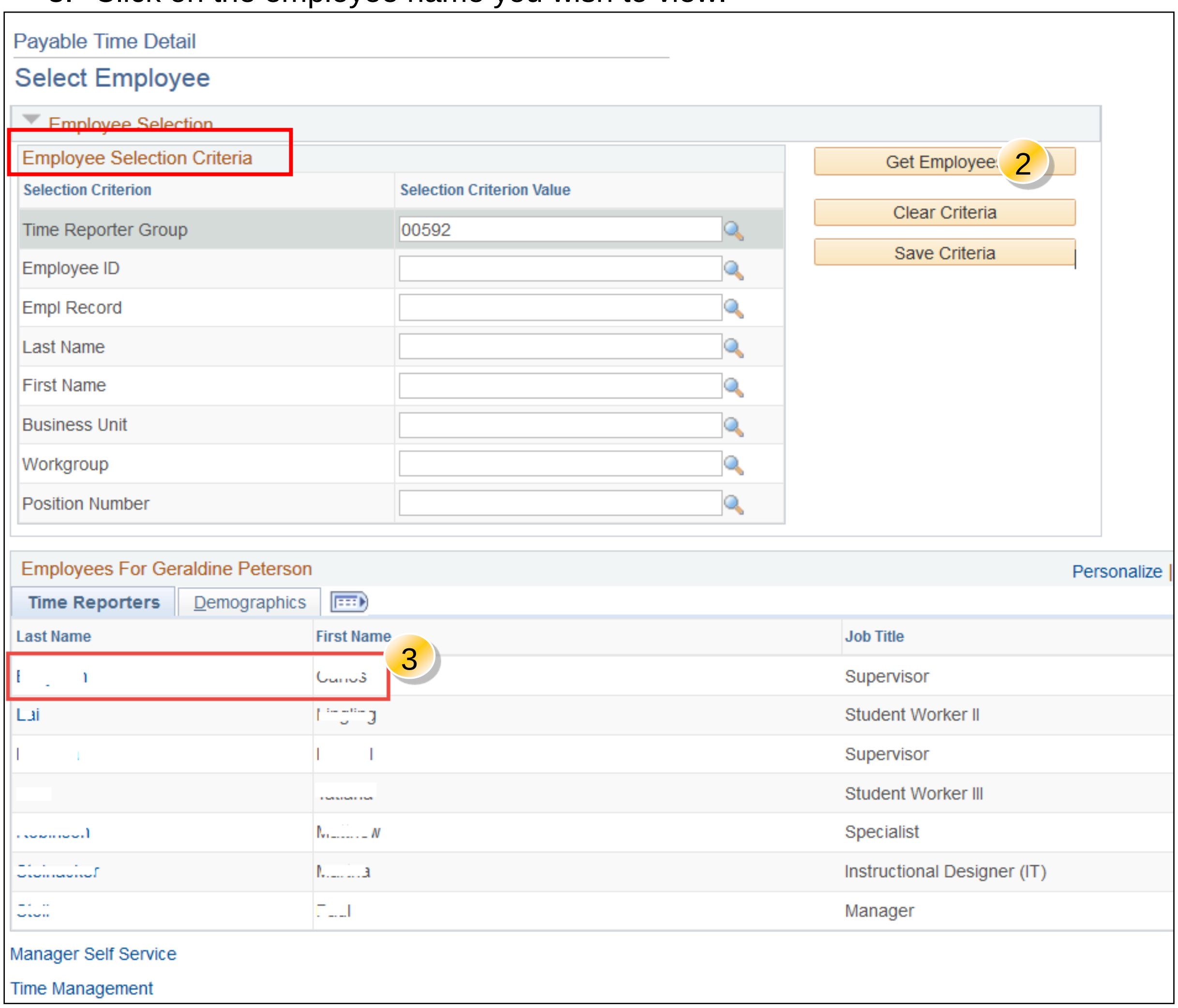
Payable Time Details

Access Payable Time Details in PeopleSoft:

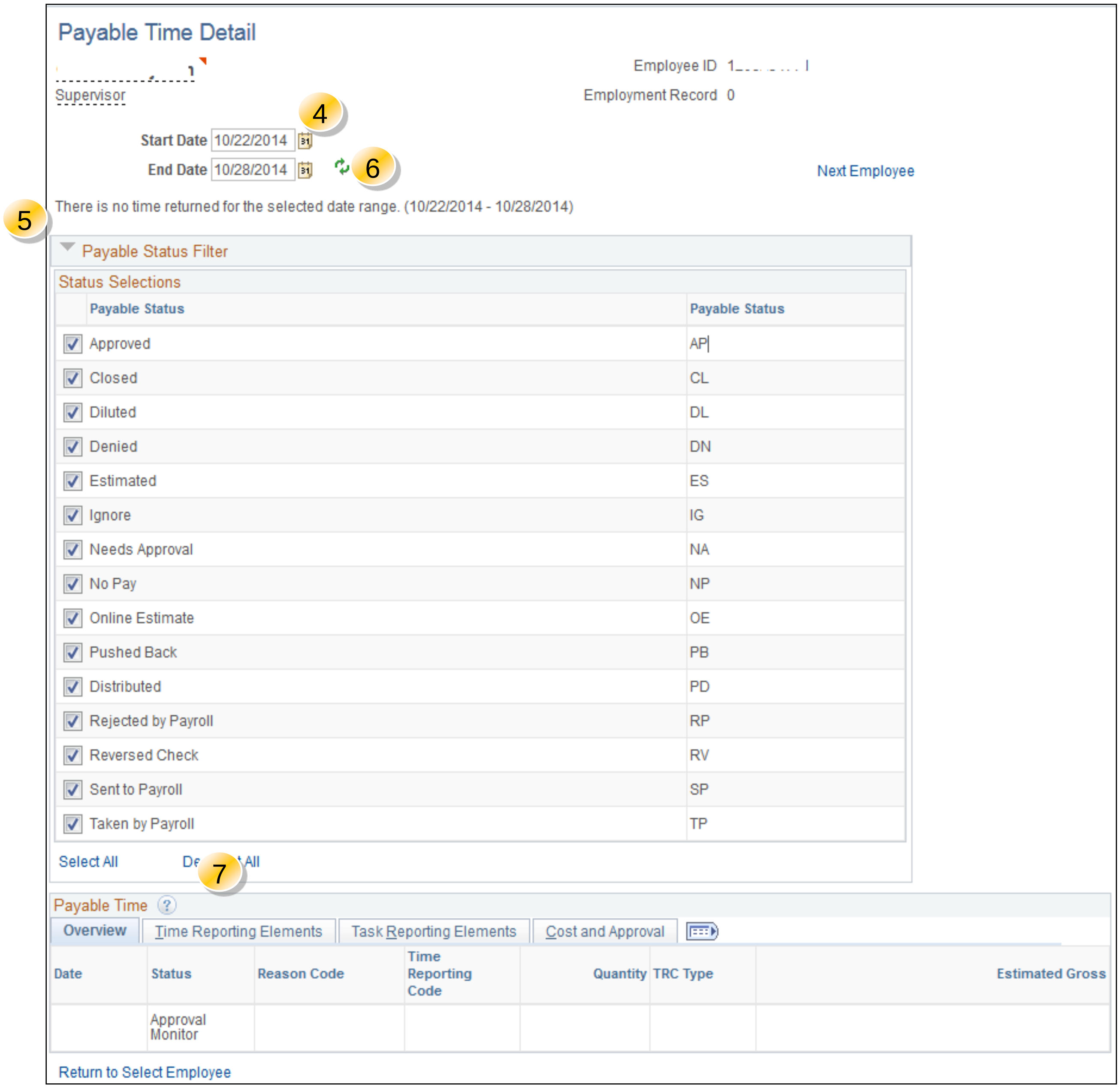


The Payable Time Detail view lists the status of an employee's pay.

1. Click on the Payable Time Detail link under the View Time menu.
2. After entering your search data, click Get Employees.
3. Click on the employee name you wish to view.



4. Click on the calendar icon, and choose a date to view.
5. If needed expand the Payable Status Filter and choose criteria.
6. Click the Refresh button.
7. View Payable Time Detail.



Payable Time Detail

Supervisor

Employee ID

Employment Record 0

Start Date 10/22/2014

End Date 10/28/2014

Next Employee

There is no time returned for the selected date range. (10/22/2014 - 10/28/2014)

Payable Status Filter

Status Selections

	Payable Status	Payable Status
☑	Approved	AP
☑	Closed	CL
☑	Diluted	DL
☑	Denied	DN
☑	Estimated	ES
☑	Ignore	IG
☑	Needs Approval	NA
☑	No Pay	NP
☑	Online Estimate	OE
☑	Pushed Back	PB
☑	Distributed	PD
☑	Rejected by Payroll	RP
☑	Reversed Check	RV
☑	Sent to Payroll	SP
☑	Taken by Payroll	TP

Select All Deselect All

Payable Time

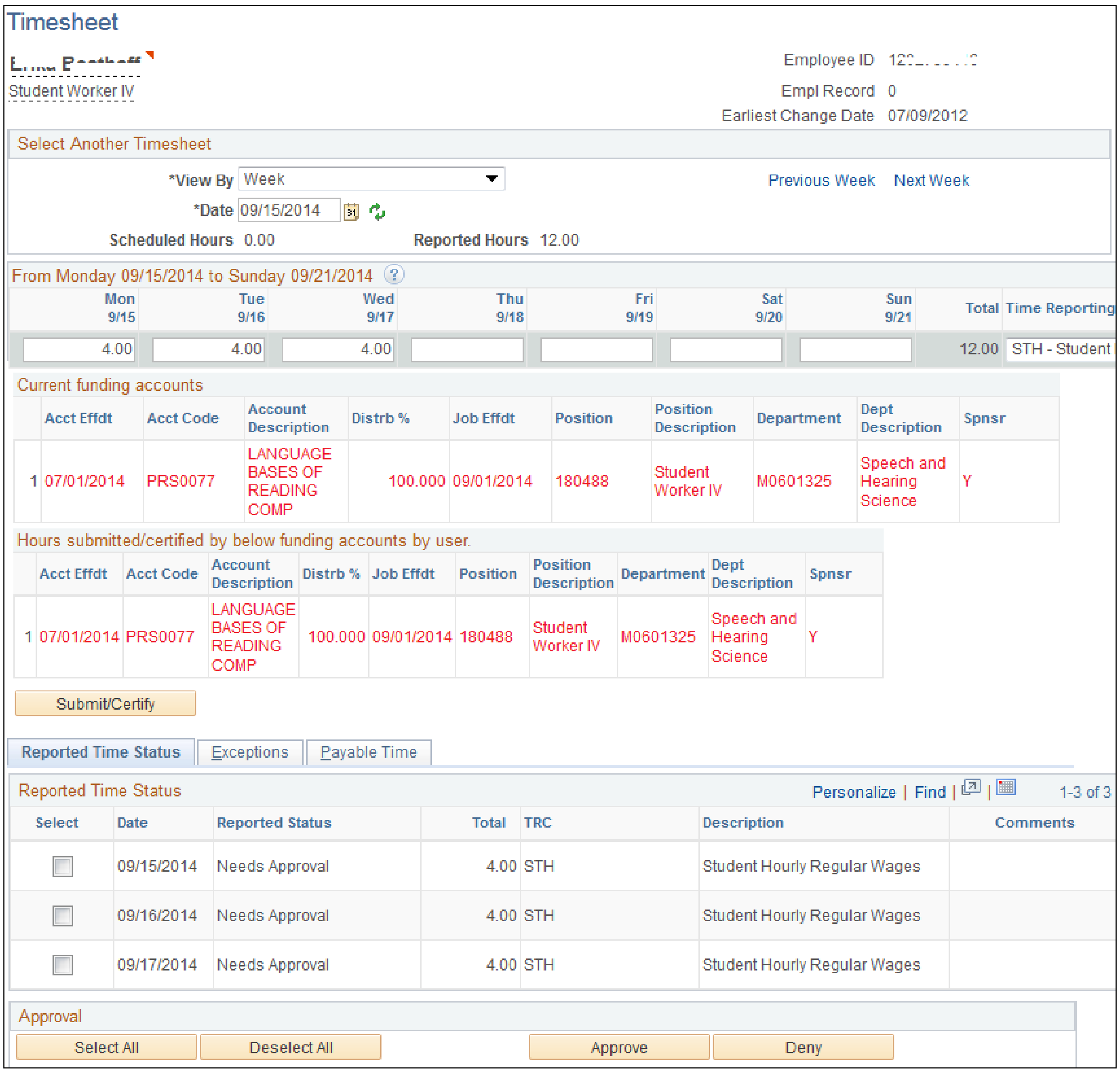
Overview | Time Reporting Elements | Task Reporting Elements | Cost and Approval

Date	Status	Reason Code	Time Reporting Code	Quantity	TRC Type	Estimated Gross
	Approval Monitor					

Return to Select Employee

Approve, Deny, Edit, Add or Delete Time for an Employee - Includes Effort Reporting Information

If the employee has effort reporting hours, you must approve their hours by clicking on their name in the “reported time” or “timesheet” screens in order to show the detail of the accounting that is associated with the time being reported. Once on the timesheet detail page, you can select all hours to approve or deny using the Select All button



Timesheet

[illegible]
Student Worker IV

Employee ID [illegible]
Empl Record 0
Earliest Change Date 07/09/2012

Select Another Timesheet

*View By Week
*Date 09/15/2014
Previous Week Next Week
Scheduled Hours 0.00 Reported Hours 12.00

From Monday 09/15/2014 to Sunday 09/21/2014

Mon 9/15	Tue 9/16	Wed 9/17	Thu 9/18	Fri 9/19	Sat 9/20	Sun 9/21	Total	Time Reporting
4.00	4.00	4.00					12.00	STH - Student

Current funding accounts

	Acct Effdt	Acct Code	Account Description	Distrb %	Job Effdt	Position	Position Description	Department	Dept Description	Spnsr
1	07/01/2014	PRS0077	LANGUAGE BASES OF READING COMP	100.000	09/01/2014	180488	Student Worker IV	M0601325	Speech and Hearing Science	Y

Hours submitted/certified by below funding accounts by user.

	Acct Effdt	Acct Code	Account Description	Distrb %	Job Effdt	Position	Position Description	Department	Dept Description	Spnsr
1	07/01/2014	PRS0077	LANGUAGE BASES OF READING COMP	100.000	09/01/2014	180488	Student Worker IV	M0601325	Speech and Hearing Science	Y

Submit/Certify

Reported Time Status | Exceptions | Payable Time

Reported Time Status Personalize | Find | 1-3 of 3

Select	Date	Reported Status	Total	TRC	Description	Comments
☐	09/15/2014	Needs Approval	4.00	STH	Student Hourly Regular Wages	
☐	09/16/2014	Needs Approval	4.00	STH	Student Hourly Regular Wages	
☐	09/17/2014	Needs Approval	4.00	STH	Student Hourly Regular Wages	

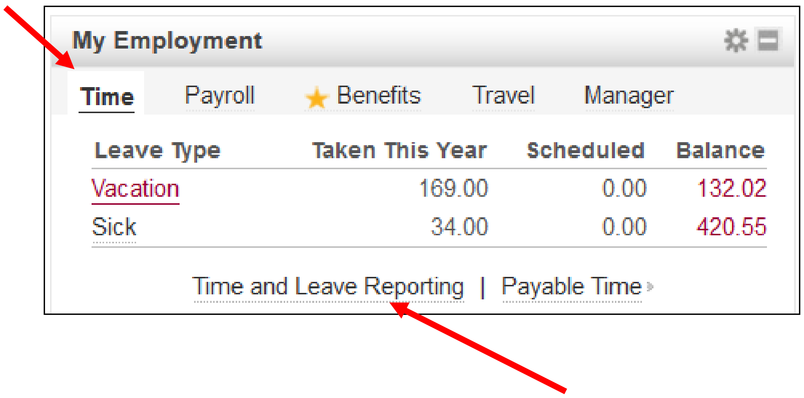
Approval

Select All Deselect All Approve Deny

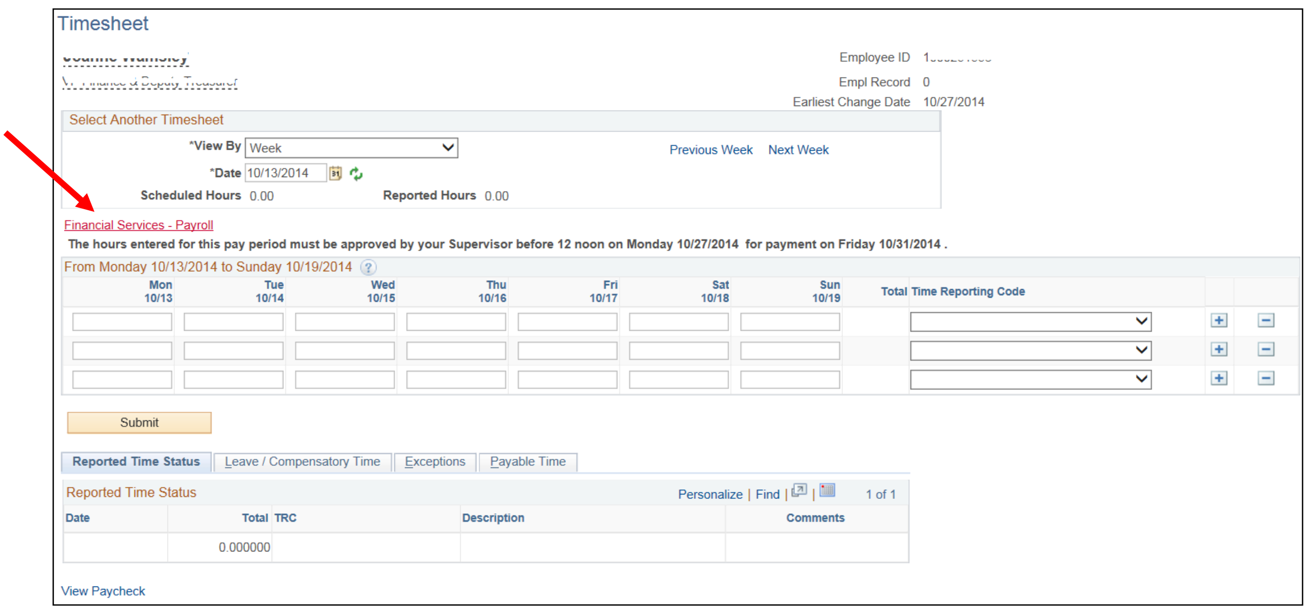
Note: If you are correcting hours from a previously submitted amount, <u>do not</u> enter zero (0) to the employee timesheet as this will create a “High Severity Exception”.

Employee Self Report Time and Leave

Employees can easily report their time from My ASU. This is found in the middle right side of the My ASU screen. Employees can click on *Time* then click again on the *Time and Leave Reporting* to report their hours.



When clicking on the Time and Leave Reporting link, they will see the below screen.



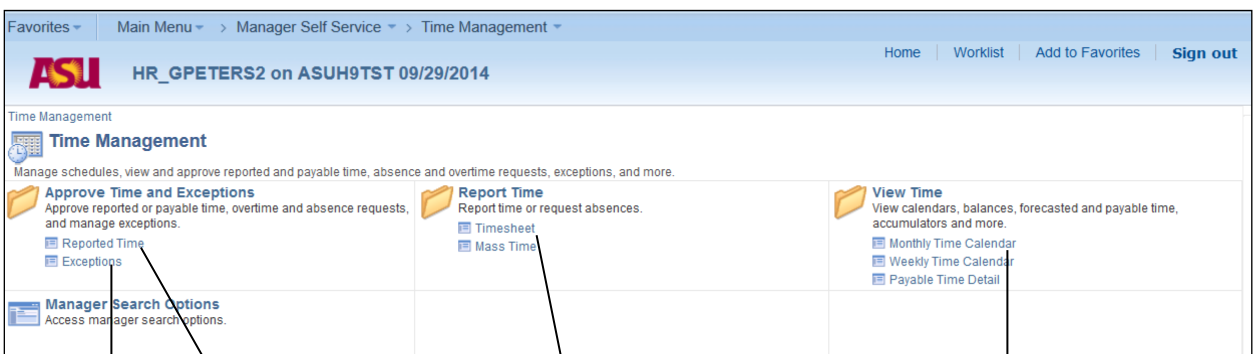
NOTE: The Financial Services - Payroll message will appear with information relating to deadlines for time entry and approval. It will also give the employee expected dates to be paid for the time they are entering.

Approve Time via PeopleSoft Screens

For personal preference, or if My ASU is unavailable, you can access the time and labor screens directly in PeopleSoft.

1) Open a web browser and go to https://hrsa.oasis.asu.edu
2) Login to Peoplesoft using your ASURITE ID and password.

Navigate to the time and labor screen by clicking on these menus:
Manager Self Service > Time Management



Exceptions
Manage exceptions for a group of time reporters

Reported Time
See only those employees with hours that need to be approved. Approve all at once.

Timesheet:
See all of your employees – Approve time 1 employee at a time.

Time Calendar
See hours submitted by all of your employees at one glance

The links shown here work identically to the screens you access via MyASU.

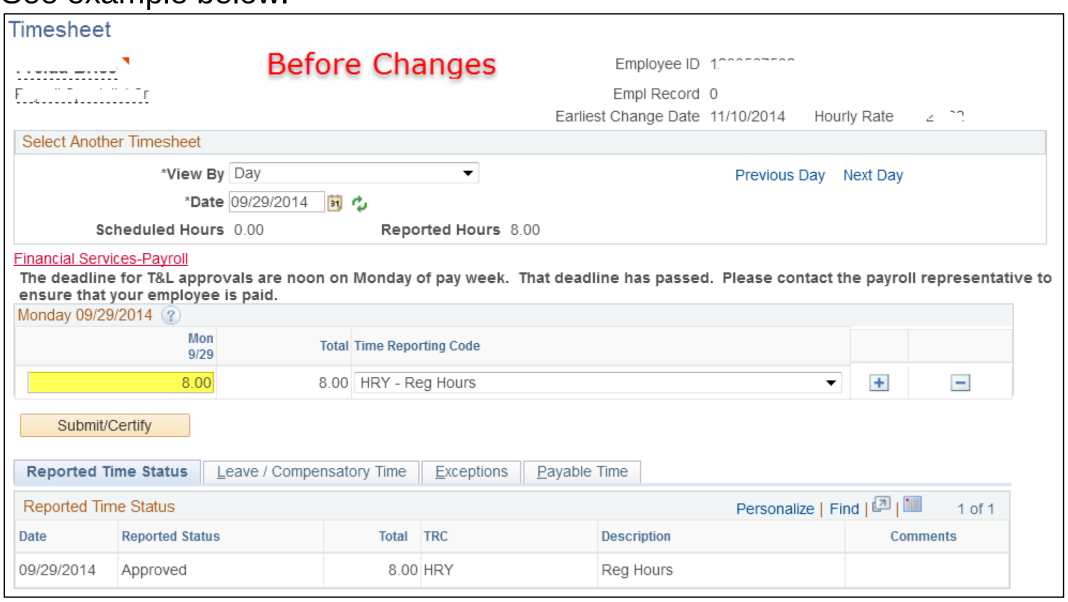
Timesheet Adjustments for Time Reported Prior to the 9.2 Implementation

This list will show the steps that a DTA will need to adjust an employee's timesheet after the pay period has ended for time that was reported prior to the 9.2 Implementation In this example, all time that surrounds the days being adjusted will be required to be re-approved.

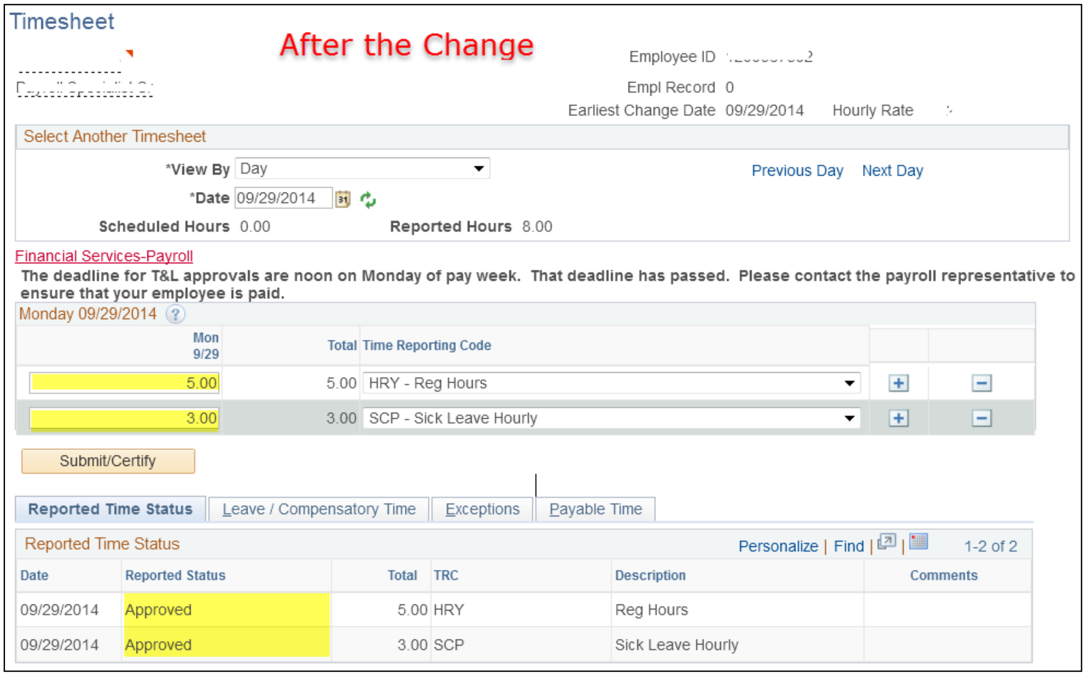
Timesheet Adjustments adjusted within 112 days (previous 8 pay periods) must use the Timesheet. Time that needs to be adjusted outside of this time period will need to follow a different procedure. See Page 22-23 for details on this process.

Step 1: Select the **Manager Self Service** Link
Step 2: Select the **Time Management** Link
Step 3: Select the **Report Time** Link
Step 4: Select the **Timesheet** Link
Step 5: Click into the **Employee ID** field and key in your employee ID number
Step 6: Click on the **Get Employees** button.
Step 7: Click on the **Employee's Last Name** and the employee's timesheet for the current week will be displayed.
Step 8: **"View By"** Click on the drop down arrow and click on "**DAY**"
Step 9: To go back to the time period that needs adjustment, either enter the date on the "**Date**" field or click on Previous Day or Time Period link.
Step 10: Change the hours on timesheet to the time and time reporting code.

See example below.



Step 11: Click on **Submit/Certify** once all changes have been made.



Step 12: Click the **check box** or **select all**.
Step 13: Click on **Approve** to approve time.

Note: IF AN ADJUSTMENT NEEDS TO BE MADE FOR THE ENTIRE WEEK OR CALENDAR PERIOD, CONTACT YOUR PAYROLL REPRESENTATIVE FOR FURTHER ASSISTANCE.

THE BEST PRACTICE IS TO "VIEW BY" DAY, ENTER THE DATE AND MAKE THE CORRECTION TO THE EMPLOYEE'S TIME AND TIME REPORTING CODE , THEN APPROVE THE TIME. REPEAT THE STEPS IF NECESARRY. If the changes are made by day, only those hours will appeared and will need to be approved.

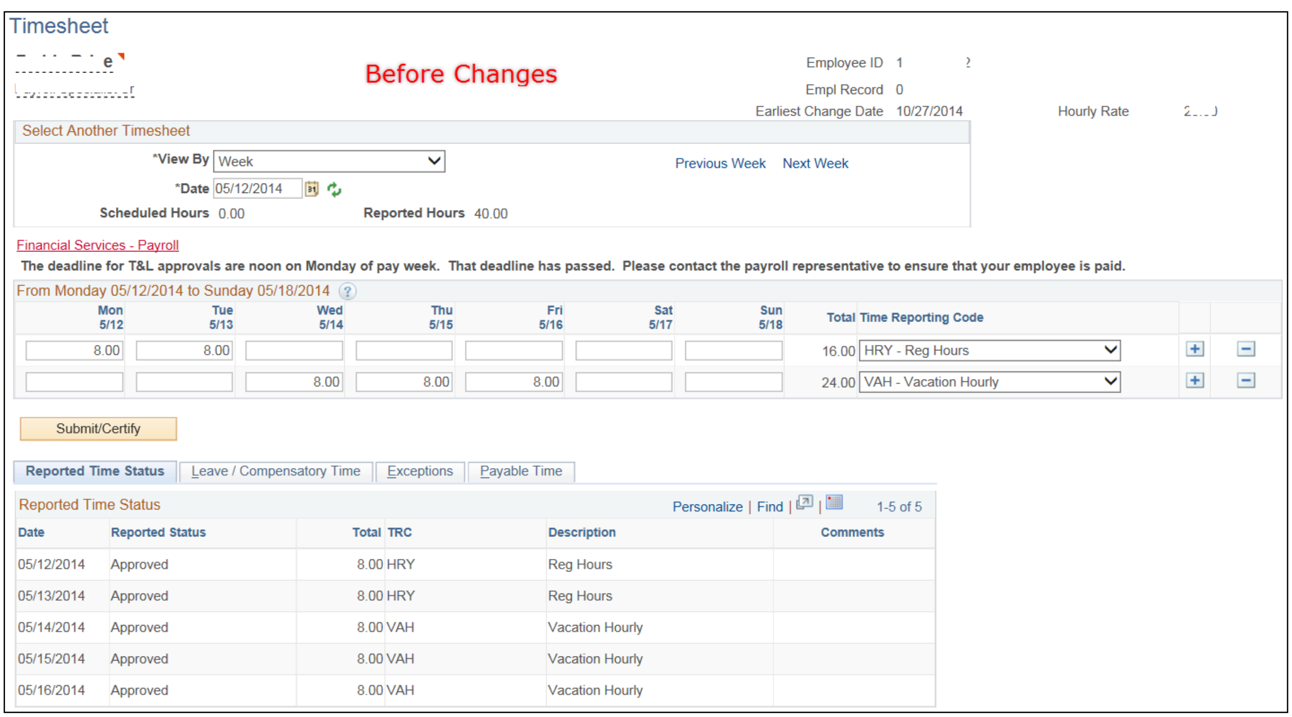
Timesheet Adjustments for Time Reported after the 9.2 Implementation

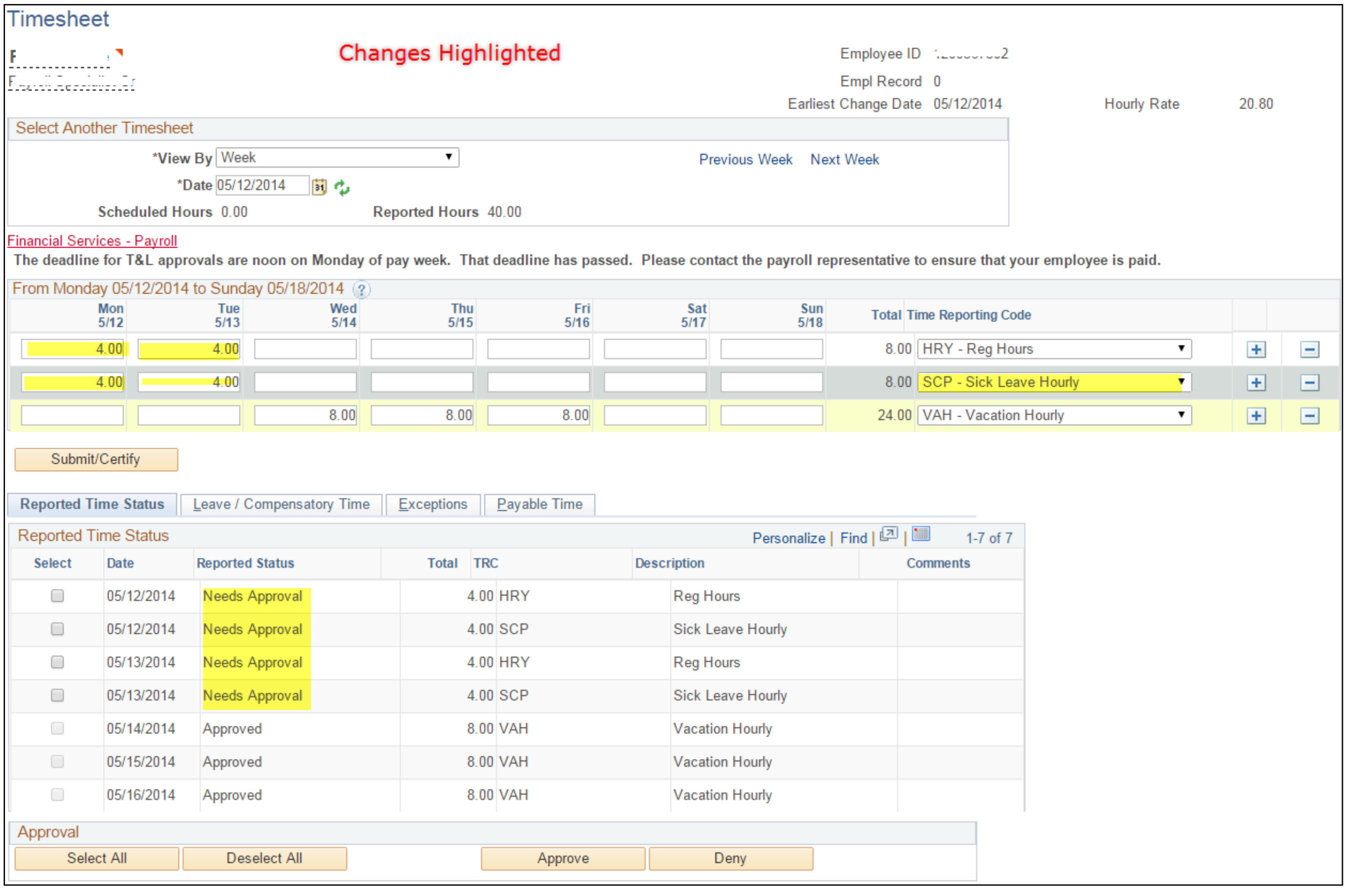
This list will show the steps that a DTA will need to adjust an employee's timesheet after the pay period has ended when the time was reported and approved after the 9.2 Implementation. In this example only the days that are changed by the DTA will need to be re-approved.

Timesheet Adjustments adjusted within 112 days (previous 8 pay periods) must use the Timesheet. Time that needs to be adjusted outside of this time period will need to follow a different procedure. See Page 22-23 for information on this process.

Step 1: Select the **Manager Self Service** Link
Step 2: Select the **Time Management** Link
Step 3: Select the **Report Time** Link
Step 4: Select the **Timesheet** Link
Step 5: Click into the **Empl ID** field and key in your employee ID number
Step 6: Click on the **Get Employees** button.
Step 7: Click on the **Employee** and the employee's timesheet for the current week will be displayed.
Step 8: To go back to the time period that needs adjustment, either enter the date on the date field or click on Previous Week or Time Period link.
Step 9: Change the hours on timesheet for the time on the particular days that are incorrect.

See example below.

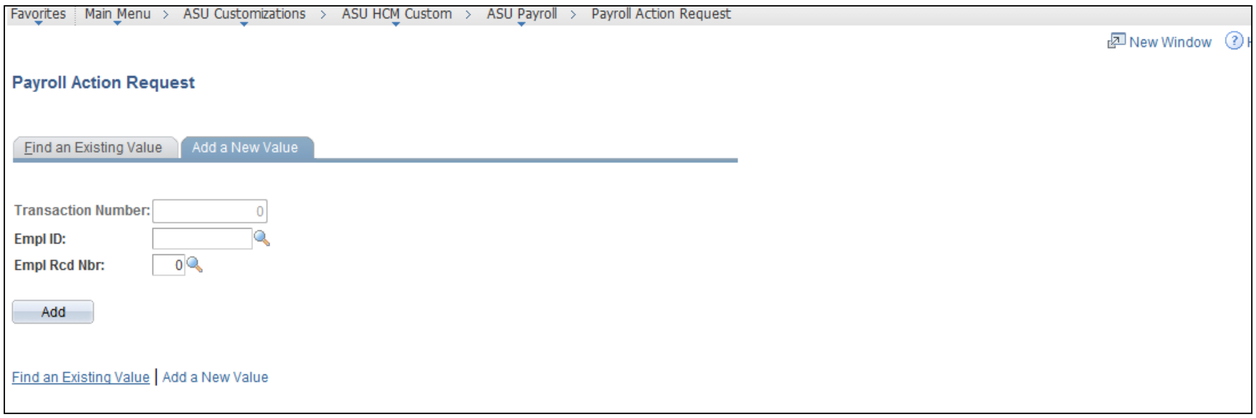




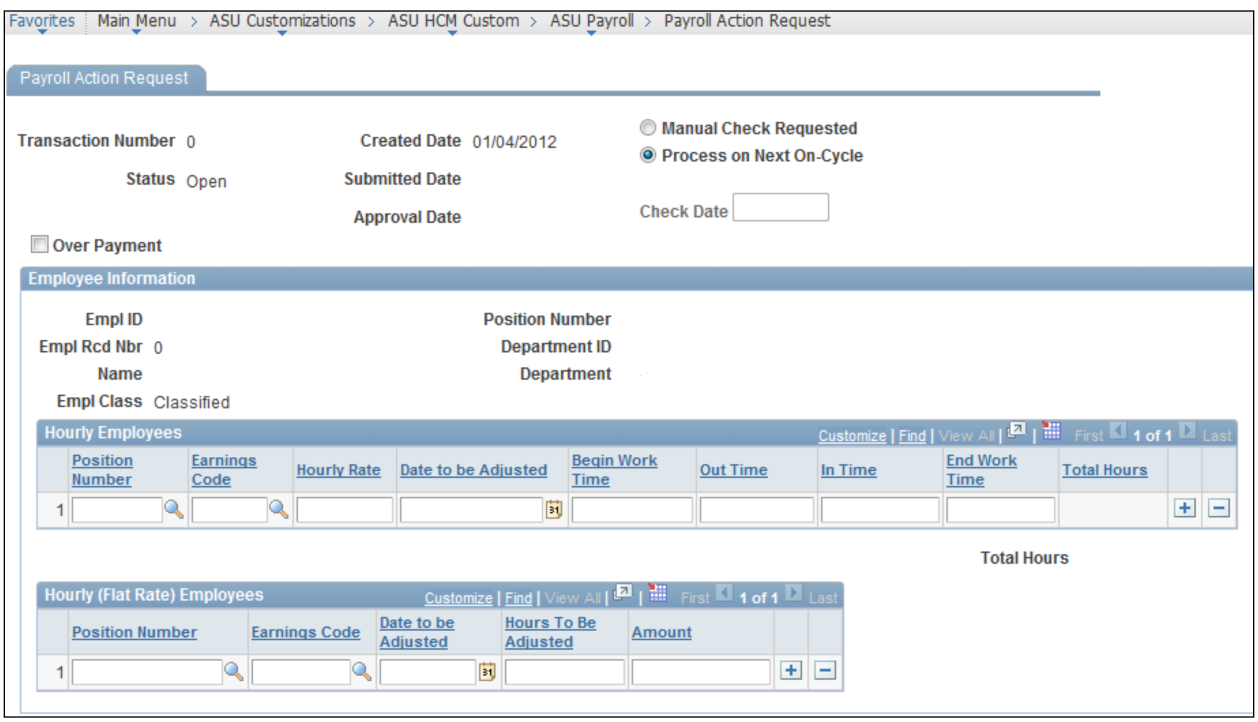
Step 10: Click on **Submit/Certify** once all changes have been made.
Step 11: Click the **check box** or **select all**.
Step 12: Click on "**Approve**" to approve time.

Time Adjustments after 112 days (previous 8 pay periods) must be submitted via Payroll Action Request.

Step 1: Select the **ASU Customization** Link
Step 2: Select the **ASU HCM Custom** Link
Step 3: Select the **ASU Payroll** Link
Step 4: Select the **Payroll Action Request** Link
Step 5: Select **Add a New Value** Tab
Step 6: Enter **Employee ID** and **Employee Record Number** then click Add



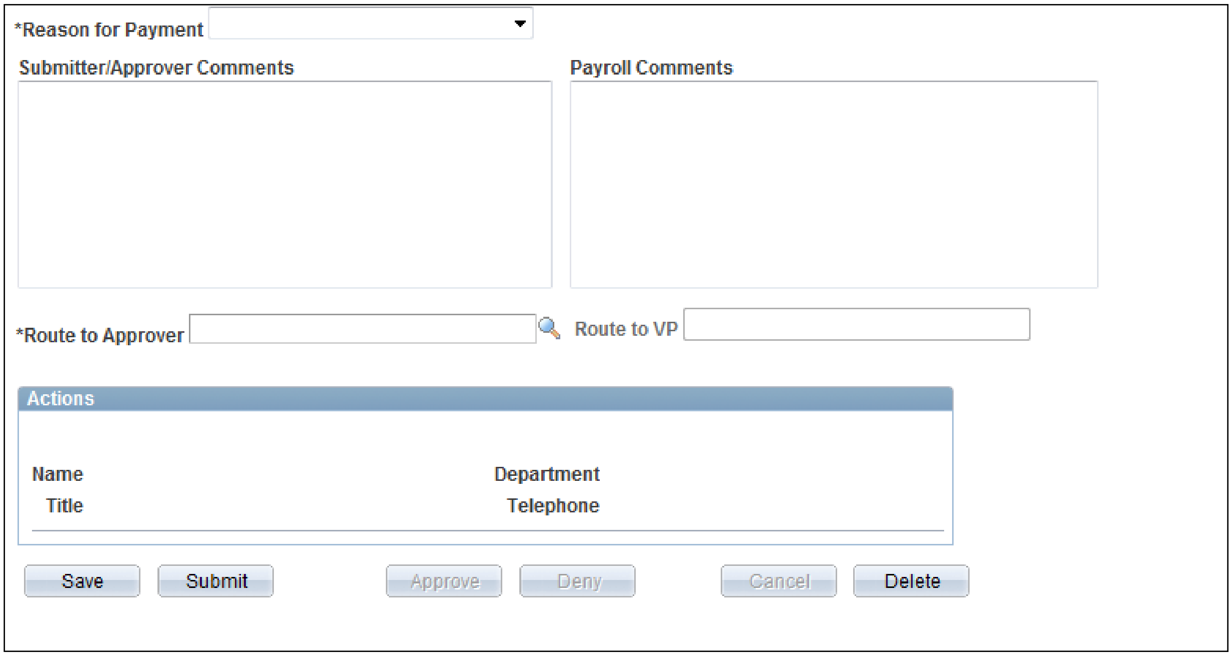
Step 7: Enter Position Number, Earnings Code, Date to be adjusted, and Hourly Rate if necessary of employee.



Step 8: Select a Reason for Payment in the drop down arrow, and enter any comments if necessary.

Step 9: Enter route to approver. If unknown, use magnifying glass to find the approver.

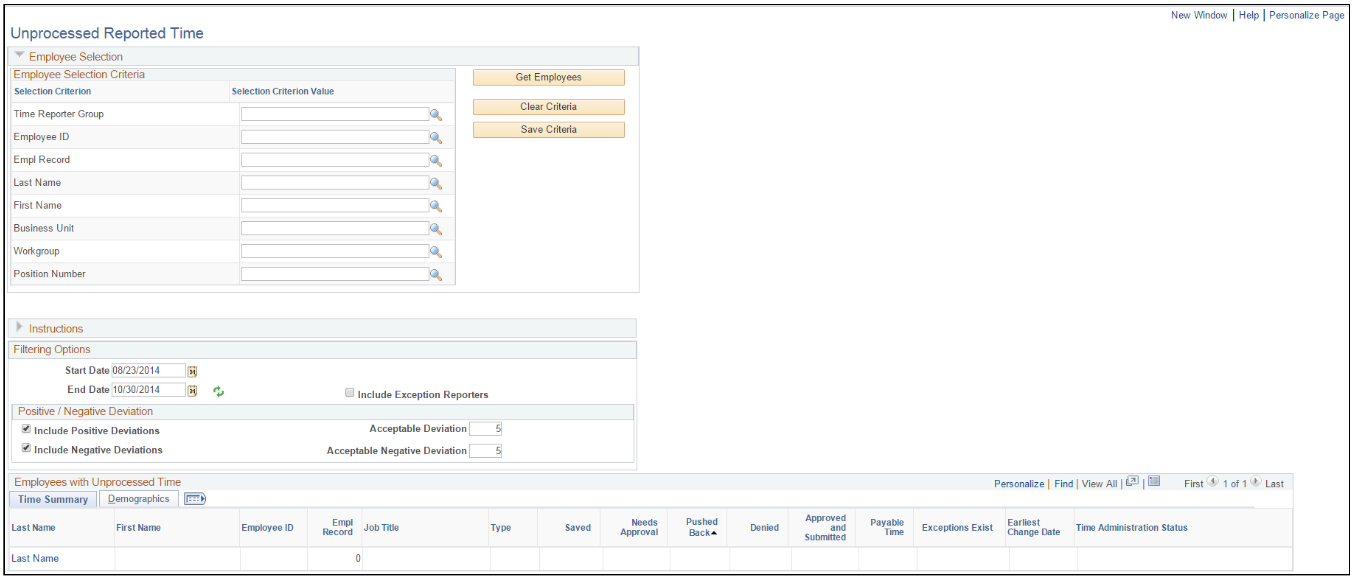
Step 10: Click on the **Submit** Button



Unprocessed Reported Time

This menu item will allow DTA's to review any reported time with a status of Needs Approval (NA), Saved (SV), or Denied (DN) and any time with exceptions within their group id, employee id, employee's first or last name, business unit, workgroup, or position number.

Navigate to the Unprocessed Reported Time by clicking on these menus:
Main Menu > Time and Labor > View Unprocessed Time > Unprocessed Reported Time



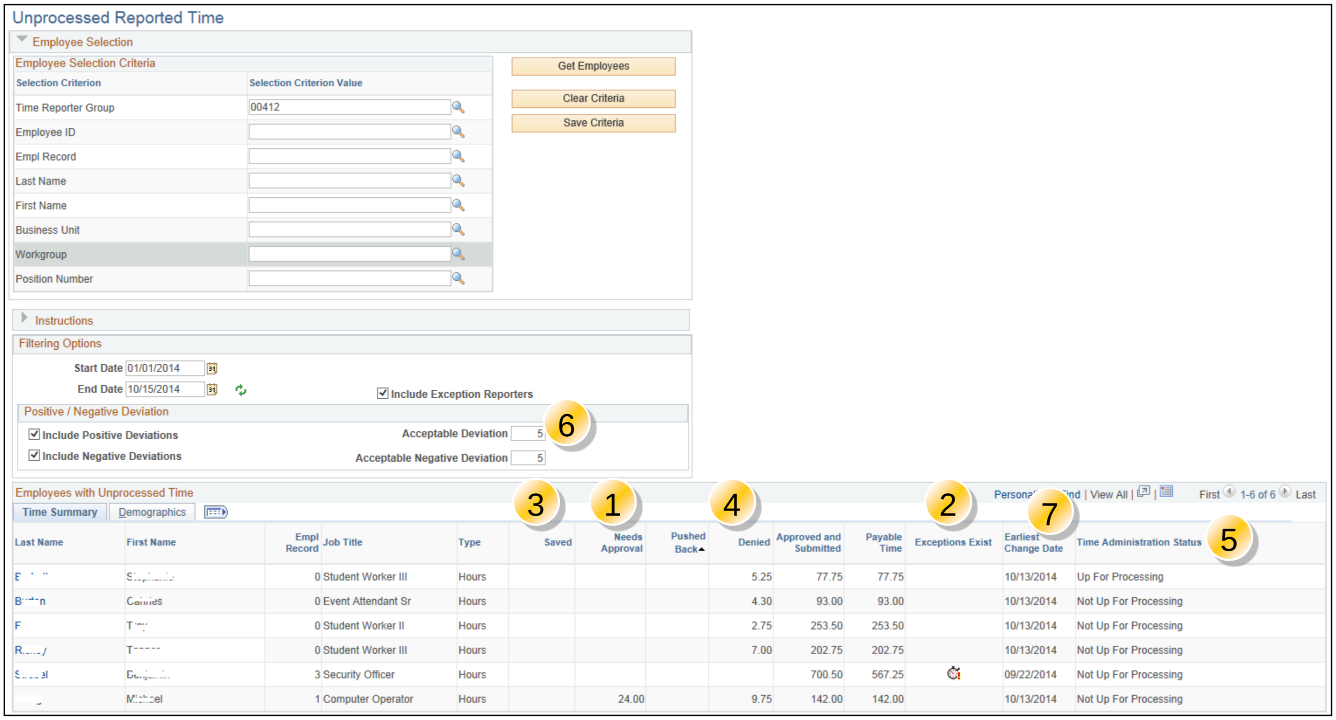
You can search for unprocessed reported time in several ways:

- Individual Employee
- List Employees by Time Reporter Group, Business Unit or Workgroup

Once the criterion is entered, click the **Get Employees button**.

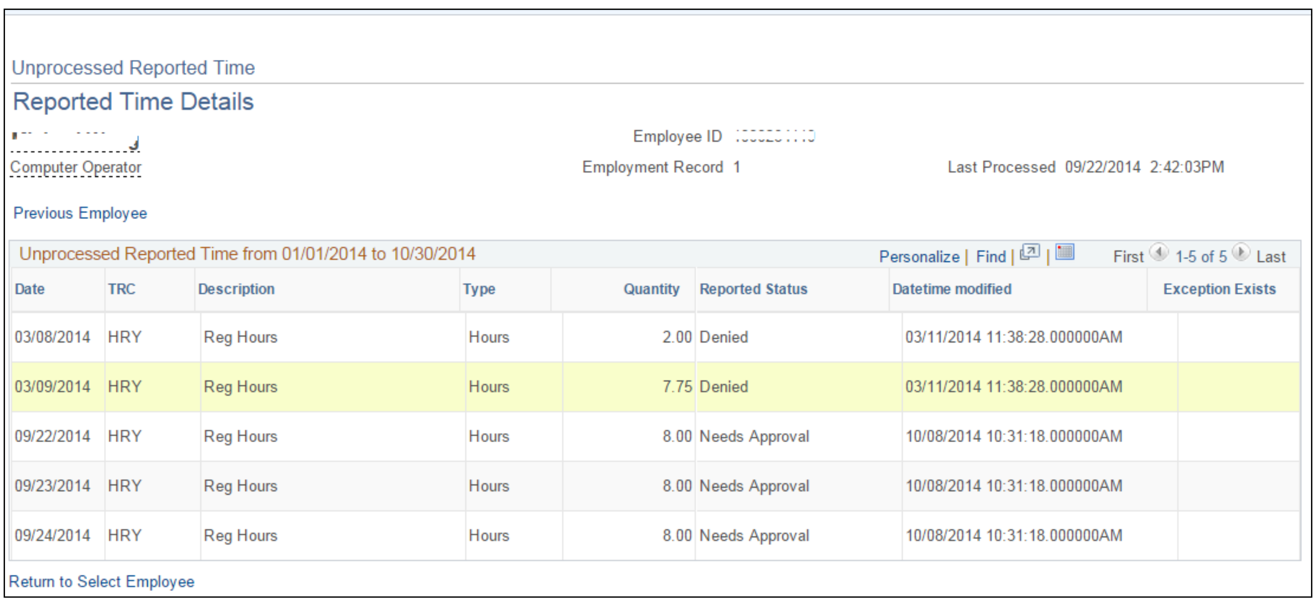
The results will populate if you have any employees with unprocessed reported time.

Note: Click on **Include Exception Reporters** to list employees that might have exceptions to their time.

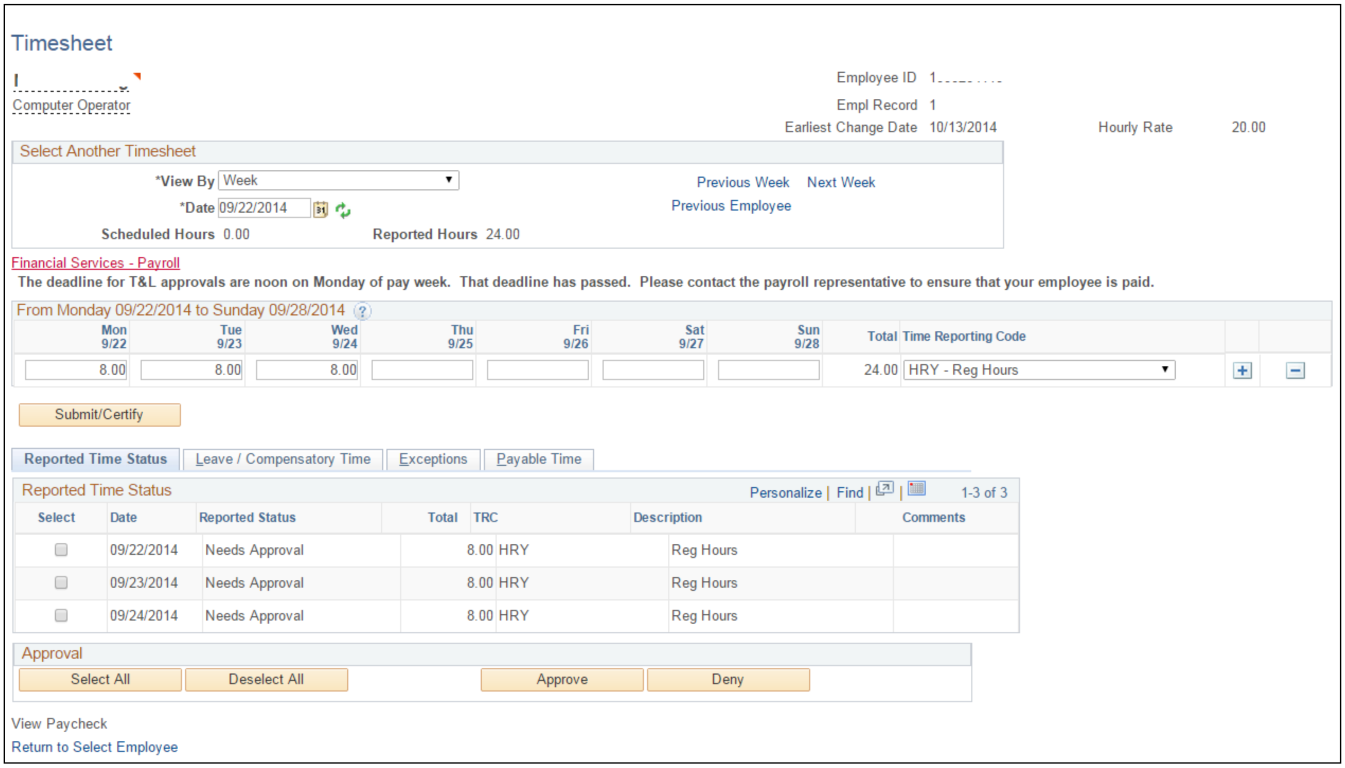


Section 1 - Needs Approval

Click on the employee name and it will bring the detail of the hours that need DTA approval.

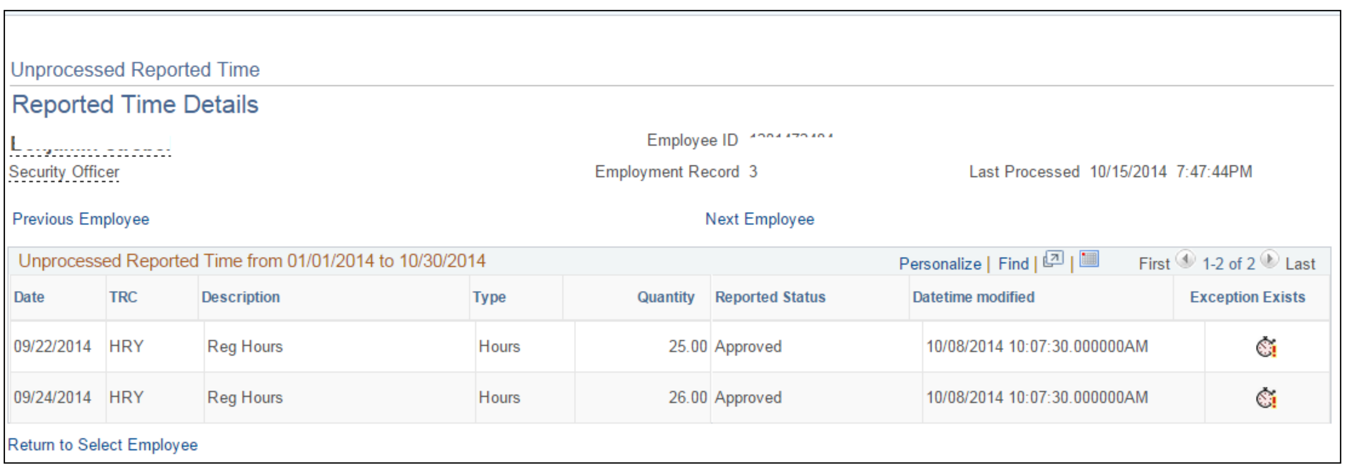


If the hours are correct and need to be approved by the DTA, then go into the employee's timesheet to approve the hours if the time is within 112 days (previous 8 pay periods). If the hours that need to be approved are after 112 days (previous 8 pay periods), a Payroll Action Request will need to be submitted (See page 17-18 for this process).

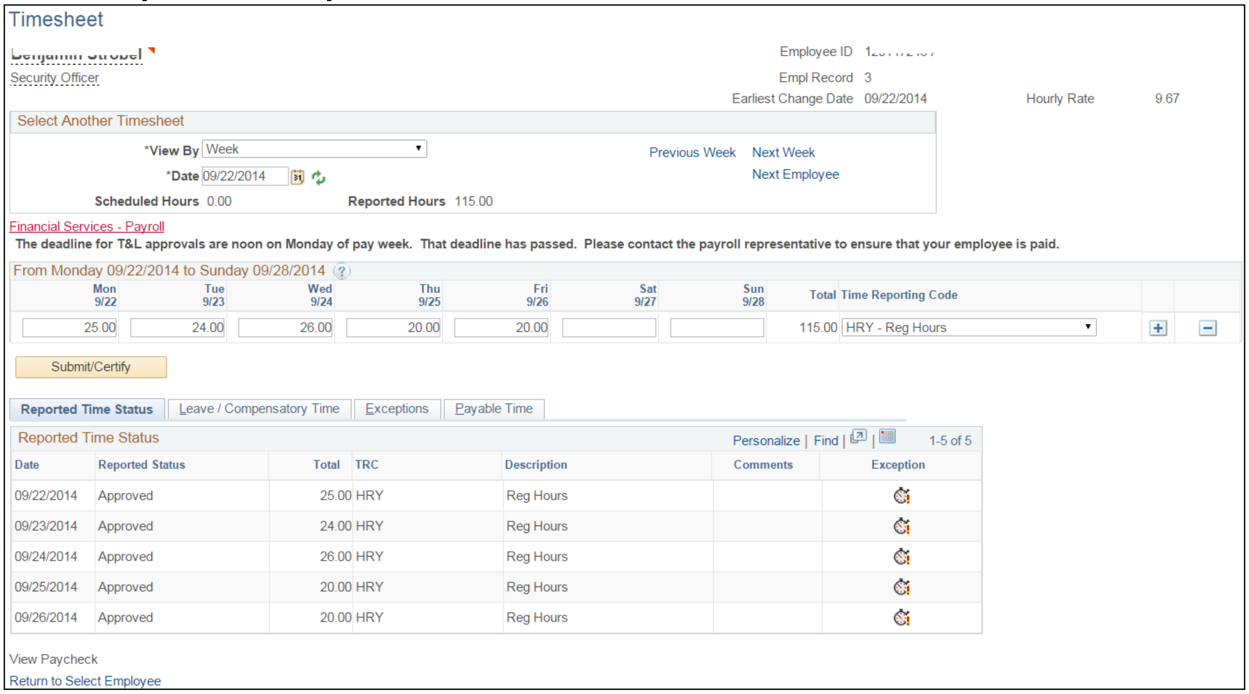


Section 2 –Exceptions

Click on the employee name and it will bring the detail of the exception that exists for that reported date.



To look in more depth at the exception go to the employee's timesheet. You can either click on the **Exceptions** tab or the Exception time clock. Click onto the **Explanation** column to view the "**Exception Description**"



Timesheet

Security Officer

Employee ID

Empl Record 3

Earliest Change Date 09/22/2014 Hourly Rate 9.67

Select Another Timesheet

*View By Week

*Date 09/22/2014

Previous Week Next Week

Next Employee

Scheduled Hours 0.00 Reported Hours 115.00

Financial Services - Payroll

The deadline for T&L approvals are noon on Monday of pay week. That deadline has passed. Please contact the payroll representative to ensure that your employee is paid.

From Monday 09/22/2014 to Sunday 09/28/2014

Mon 9/22	Tue 9/23	Wed 9/24	Thu 9/25	Fri 9/26	Sat 9/27	Sun 9/28	Total	Time Reporting Code
25.00	24.00	26.00	20.00	20.00			115.00	HRY - Reg Hours

Submit/Certify

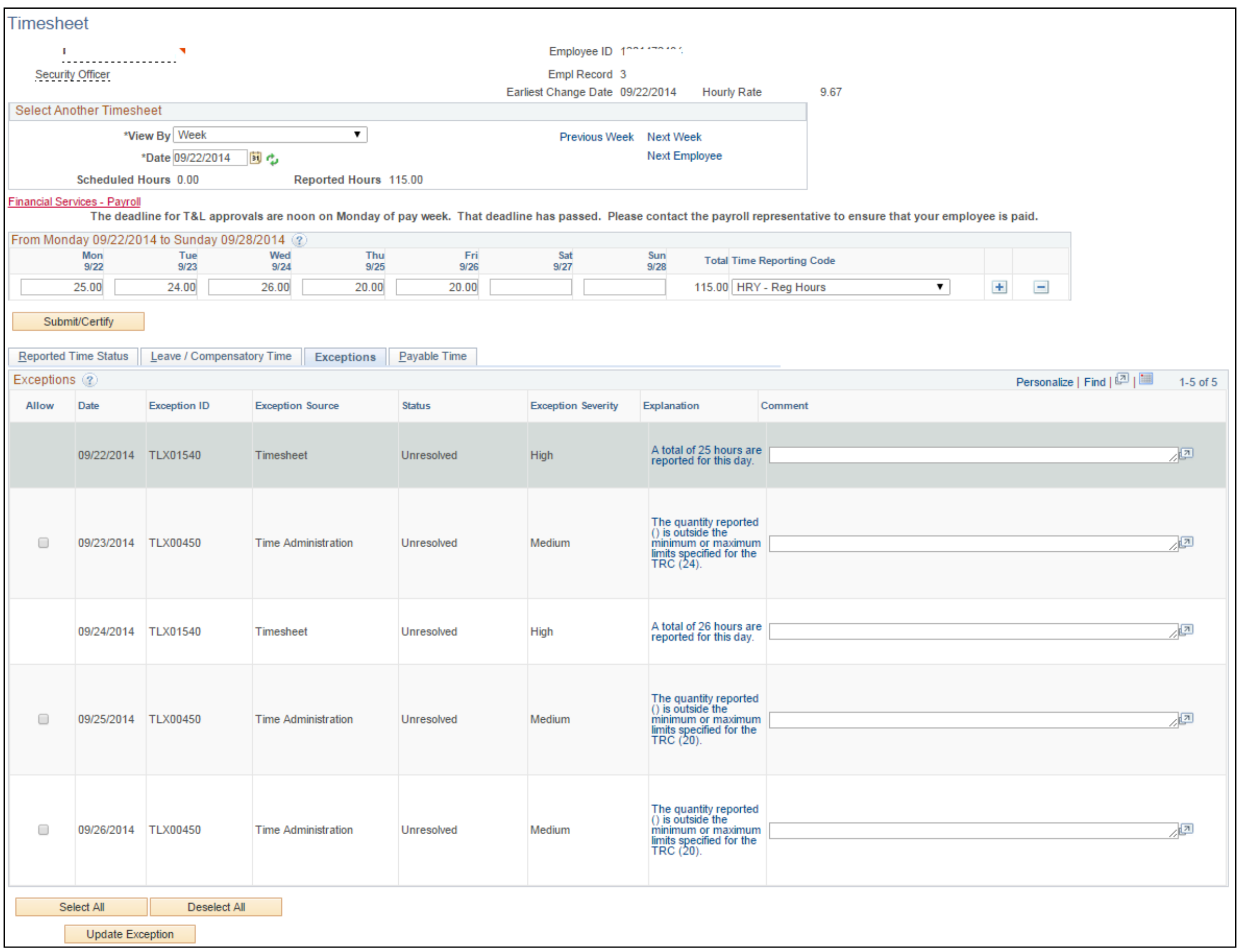
Reported Time Status | Leave / Compensatory Time | Exceptions | Payable Time

Reported Time Status — Personalize | Find | 1-5 of 5

Date	Reported Status	Total	TRC	Description	Comments	Exception
09/22/2014	Approved	25.00	HRY	Reg Hours		
09/23/2014	Approved	24.00	HRY	Reg Hours		
09/24/2014	Approved	26.00	HRY	Reg Hours		
09/25/2014	Approved	20.00	HRY	Reg Hours		
09/26/2014	Approved	20.00	HRY	Reg Hours		

View Paycheck

Return to Select Employee



Timesheet

Security Officer

Employee ID

Empl Record 3

Earliest Change Date 09/22/2014 Hourly Rate 9.67

Select Another Timesheet

*View By Week

*Date 09/22/2014

Previous Week Next Week

Next Employee

Scheduled Hours 0.00 Reported Hours 115.00

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Submit/Certify

Reported Time Status | Leave / Compensatory Time | Exceptions | Payable Time

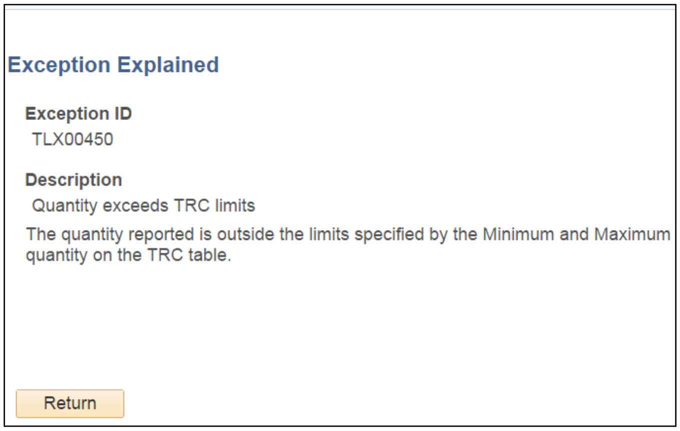
Exceptions — Personalize | Find | 1-5 of 5

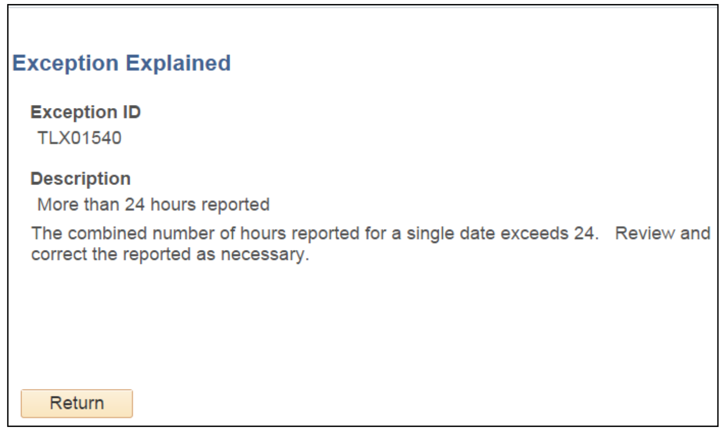
Allow	Date	Exception ID	Exception Source	Status	Exception Severity	Explanation	Comment
	09/22/2014	TLX01540	Timesheet	Unresolved	High	A total of 25 hours are reported for this day.	
	09/23/2014	TLX00450	Time Administration	Unresolved	Medium	The quantity reported () is outside the minimum or maximum limits specified for the TRC (24).	
	09/24/2014	TLX01540	Timesheet	Unresolved	High	A total of 26 hours are reported for this day.	
	09/25/2014	TLX00450	Time Administration	Unresolved	Medium	The quantity reported () is outside the minimum or maximum limits specified for the TRC (20).	
	09/26/2014	TLX00450	Time Administration	Unresolved	Medium	The quantity reported () is outside the minimum or maximum limits specified for the TRC (20).	

Select All Deselect All

Update Exception

You can click on the exception to view the explanation details. See example of details below.





For any **Low** and **Medium** exception severity, the DTA can resolve these themselves. If any questions arise, please contact your payroll representative for assistance.

For a **High** exception severity this must be resolved before the reported time can become payable time. For any high exception severity errors, please contact your payroll representative for assistance.

Section 3 –Saved
Click on the employee name and it will bring the detail of the hours that need employee and DTA approval before it becomes payable time.

Section 4 - Denied
Click on the employee name and it will bring the detail of the hours that have been denied. You will then need to navigate to the timesheet to make changes to the time if needed.

Section 5- Time Administration Status
TA Status – “Up for Processing” means the time reporter is ready for processing.
TA Status – “Not Up for Processing” means the time reporter is not ready for processing, for example “Time Needs Approval”.

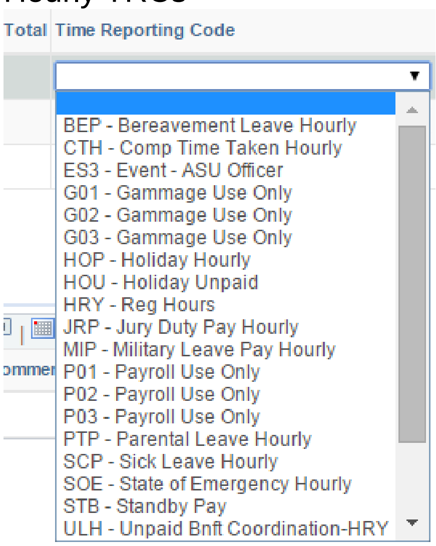
Section 6 – Deviation
This field defaults to “5”. In order to get a true representation of all differences of time (reported and or payable) ***change this field to “0”.***

Section 7 – Earliest Change Date
The earliest addition or update to time-related data for a time reporter since the last Time Administration run. This date is a trigger for Time Administration's determination of a time reporter's period of interest.

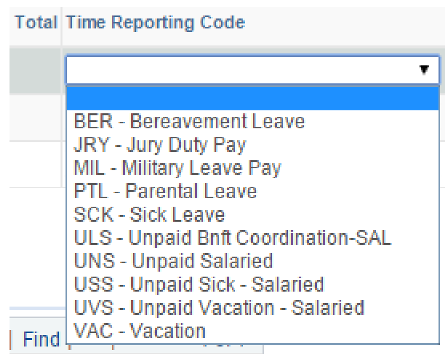
Appendix

Time Reporting Codes (TRC) by Position Type

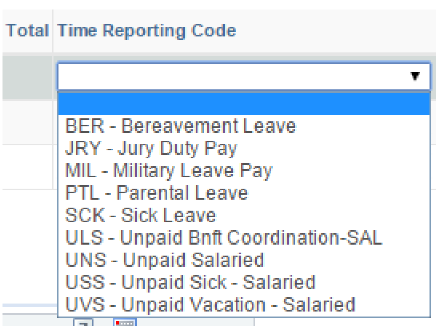
Hourly TRCs



Salaried



Academic Professinal ACD / A12



Student