

# **North Dakota University System**

## **Absence Management Manager Self Service Training Manual**

**PEOPLESOFT**

**VERSION 9.1**

# MANAGER SELF SERVICE – ABSENCE MANAGEMENT

## OVERVIEW

All employees who earn leave will request time off through the Absence Management module in PeopleSoft. This applies to all types of leave: sick (with the subset of dependent sick), annual, jury, military and funeral.

An absence can be requested for an event that occurred in the past (e.g. a sick day) or for an event to occur in the future, such as annual leave. All absences should be entered by the employee, and approved by the supervisor, no later than the end of the pay period in which the absence occurs.

An absence cannot be requested for a date an employee is not scheduled to work. Basic employee schedules have been populated into the module.

Employee balances reflect the pay period of the most recent check. For example, if today is April 23; the last paycheck was April 15th, the pay period for April 15th paycheck is March 16th-31st. The leave balances would be current as of March 31st. Please contact your Human Resources/Payroll Office if you feel your balances are incorrect.

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**NOTE: During the initial rollout, leave balances from the old method of taking leave will not display in Absence Management until after the first payroll runs under the new method. This is a planned part of the conversion process.**

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The business process under the new process is as follows:

1. An employee signs into PeopleSoft and enters a leave request before (for planned absences) or after (for unplanned absences) an event.
2. The supervisor signs into HRMS
3. The supervisor has three choices for taking action on the request:
  - a. Approve – the employee receives an approval email
  - b. Deny – the employee receives a denial email
  - c. Push back – the employee receives an email requesting modification of the request.
4. If the request is approved, it is processed in the next pay cycle.

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**NOTE: Once an absence request has been approved, it cannot be canceled by the employee or the supervisor**

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## APPROVING, DENYING AND PUSHING BACK

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

This will bring up a list of all absence requests pending your approval for the employees that report to you. It will show the following absences

- Approved
- Denied
- Pending

If there are no Absence Requests pending, the system will display a message indicating there are no results to display.

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 **Push Back** 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.

# APPROVE ABSENCE REQUESTS

MANAGER SELF SERVICE > TIME MANAGEMENT > APPROVE TIME AND EXCEPTIONS > ABSENCE REQUESTS

Sign into PeopleSoft directly. A list of all pending approvals will display. Choose one employee's request by clicking on the hyperlinked name

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

## Absence Requests

Network Services Mgr

Select the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by selecting 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 : Pending

Refresh

Absence Requests							
Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status	Submitted
<a href="#">Shelby Smith</a>		Network Engineer	Annual Leave	08/29/2016	08/29/2016	Submitted	08/29/2016
		Senior Network Analyst	Annual Leave	11/09/2016	11/10/2016	Submitted	07/27/2016
		Network Architect	Annual Leave	08/11/2016	08/15/2016	Submitted	05/06/2016
		Network Architect	Annual Leave	07/28/2016	07/29/2016	Submitted	05/06/2016

Go To [View Monthly Calendar](#)

[Favorites](#) | [Main Menu](#) > [Manager Self Service](#) > [Time Management](#) > [Approve Time and Exceptions](#) > [Absence Requests](#)

## Approve Absence Request

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### Request Details

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

Absence Detail ?	
Start Date :	08/29/2016
End Date :	08/29/2016
Absence Name :	Annual Leave <span style="float: right;">Current Balance : 285.97 Hours**</span>
Partial Days :	None
Duration :	8.00          Hours

Additional Information	
Start Time:	End Time:

Workflow	
Status :	Submitted

Comments	
Requestor Comments :	
Approver Comments :	<input type="text" value="Have Fun!"/>

Go To [View Absence Request History](#) [View Absence Balances](#) [View Monthly Calendar](#)

  
    
    
 [Return to Absence Requests](#)

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

Add any (optional) comments.

Choose the "Approve" button.

# DENY ABSENCE REQUESTS

MANAGER SELF SERVICE > TIME MANAGEMENT > APPROVE TIME AND EXCEPTIONS > ABSENCE REQUESTS

Approve Absence Request

## Request Details

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

Absence Detail ?	
Start Date :	08/29/2016
End Date :	08/29/2016
Absence Name :	Annual Leave
Partial Days :	None
Duration :	8.00 Hours
Current Balance : 285.97 Hours**	

Additional Information	
Start Time:	End Time:

Workflow	
Status :	Submitted

Comments	
Requestor Comments :	
Approver Comments :	<input type="text" value="This request is not approved"/>

Go To [View Absence Request History](#) [View Absence Balances](#) [View Monthly Calendar](#)

[Return to Absence Requests](#)

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

# PUSH BACK ABSENCE REQUESTS

MANAGER SELF SERVICE > TIME MANAGEMENT > APPROVE TIME AND EXCEPTIONS > ABSENCE REQUESTS

UNIVERSITY SYSTEM  
Favorites | Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests

### Approve Absence Request

## Request Details

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

Absence Detail ?	
Start Date :	08/29/2016
End Date :	08/29/2016
Absence Name :	Annual Leave
Partial Days :	None
Duration :	8.00 Hours
Current Balance : 285.97 Hours**	

Additional Information	
Start Time:	End Time:

Workflow	
Status :	Submitted

Comments	
Requestor Comments :	
Approver Comments :	<input type="text" value="Please correct the leave request"/>

Go To [View Absence Request History](#) [View Absence Balances](#) [View Monthly Calendar](#)

[Return to Absence Requests](#)

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

## VIEWING ABSENCE REQUEST HISTORY

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 Job Data "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.

Favorites | Main Menu > Manager Self Service > Time Management > View Time > Absence Request History

### Absence Request History

Shelby Smith

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and select the Refresh button. 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	Edit
<a href="#">Annual Leave</a>	Approved	10/03/2016	10/03/2016	<input type="button" value="Edit"/>
<a href="#">Sick Leave</a>	Approved	09/26/2016	09/26/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	09/20/2016	09/20/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Saved	09/08/2016	09/08/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	09/02/2016	09/02/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Push Back	09/01/2016	09/01/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Saved	08/30/2016	08/30/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Submitted	08/29/2016	08/29/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	08/26/2016	08/26/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	08/25/2016	08/25/2016	<input type="button" value="Edit"/>

[Return to Direct Reports](#)

## VIEWING AN EMPLOYEE'S ABSENCE BALANCES

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

A page will display listing all of the employees that report to you, and is populated automatically by the system via job data **Reports To** field.

The screenshot shows the 'View Absence Balances' page for Betty Locherty's employees. The breadcrumb trail is: Favorites > Main Menu > Manager Self Service > Time Management > View Time > Absence Balances. The page title is 'View Absence Balances'. Below the title is the 'Employee Selection Criteria' section, which states: 'Select the employee you'll be working with. You can initiate transactions only for employees who reported to you as of the date you entered on this page.' There is an 'As Of Date' field set to 04/14/2016 and a 'Refresh Employees' button. Below this is a table titled 'Betty Locherty's employees' with columns: Select, Name, Empl ID, Job, Empl Status, HR Status, and Position. The table contains six rows of employee data.

Select	Name	Empl ID	Job	Empl Status	HR Status	Position
Select	Diane Palmer	K0MTX005	0	Active	Active	
Select	+ Jill Chancelor	KUL702	0	Active	Active	
Select	+ Netty Owyang	KU0055	0	Active	Active	
Select	+ Rosanna Channing	KU0046	0	Active	Active	
Select	Susan Hoinck	KU0119	0	Active	Active	
Select	+ Tina Palisco	KU0071	0	Active	Active	

Once you have selected the employee the following page will display the employee's balances.

The screenshot shows the 'View Absence Balances' page for Shelby Smith. The breadcrumb trail is: Favorites > Main Menu > Manager Self Service > Time Management > View Time > Absence Balances. The page title is 'View Absence Balances'. Below the title is the name 'Shelby Smith'. The text reads: '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.' Below this is the 'Absence Entitlement Balances' section, which has a 'Personalize' button and a 'Current Balances' tab. The table shows the following data:

Entitlement Name	Balance as of 07/15/2016	From	To	Accrual Period
Sick Entitlement	1323.86 Hours	01/01/2016	12/31/2016	Year to Date
Annual Entitlement	285.97 Hours	01/01/2016	12/31/2016	Year to Date

Below the table are links: 'Go To Forecast Balance' and 'Return to Direct Reports'.

# VIEW MONTHLY TIME CALENDAR

Manager Self Service>Time Management>View Time>Monthly Time Calendar

favorites | Main Menu > Manager Self Service > Time Management > View Time > Monthly Time Calendar

Description	Value
Time Reporter Group	<input type="text"/>
Empl ID	<input type="text"/>
Empl Record	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Job Code	<input type="text"/>
Job Description	<input type="text"/>
Department	<input type="text"/>
Reports To Position Number	00100358
Company	<input type="text"/>
Position Number	<input type="text"/>

Expand to view Instructions

[Daily Calendar](#)
[Weekly Calendar](#)
[Monthly Calendar](#)

View Criteria

Month: 
 Previous Month
 Next Month

Year: 
 Reported or Payable Hours

Reported Hours
  Payable Hours

Start Time:

End Time:

Display Options

Show Schedule
  Show Holidays
  Show Symbols

Show Training Hours
  Show Planned Overtime

Show Absences
  Show Exceptions

Employee	Job Title	Hours	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Ryan Ford	Network Engineer	184.00	CHRG																				
Kevin Dudley	Sr Network Analyst	184.00	CHRG																				
Scott White	Senior Network Analyst	184.00	CHRG																				
Avril Danielson	Network Architect	40.00	CHRG																				
Brian Ribau	Network Analyst	88.00	CHRG																				
Amy Stewart	Network Engineer	184.00	CHRG																				

Approved Absence
  Requested Absence
  Holiday
  Off Day

To:

[Manager Self Service](#)
[Time Management](#)

# VIEW MONTHLY TIME CALENDAR – USE THIS NAVIGATION

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

Select an employee

Request Absence

Oliva Johnson

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 : 04/14/2016 [View Monthly Calendar](#)

\* Absence Name : Select Absence Name

Comments

Requestor Comments :

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

[Return to Direct Reports](#)

Required Field

Monthly Time Calendar

Employee: Oliva Johnson, Position: NDUS SITS Professional

Month	Year	Day	Time	Color
Apr	2016	01	08:00 - 05:00	Workday
Apr	2016	02	08:00 - 05:00	Workday
Apr	2016	03	08:00 - 05:00	Workday
Apr	2016	04	08:00 - 05:00	Workday
Apr	2016	05	08:00 - 05:00	Workday
Apr	2016	06	08:00 - 05:00	Workday
Apr	2016	07	08:00 - 05:00	Workday
Apr	2016	08	08:00 - 05:00	Workday
Apr	2016	09	08:00 - 05:00	Workday
Apr	2016	10	08:00 - 05:00	Workday
Apr	2016	11	08:00 - 05:00	Workday
Apr	2016	12	08:00 - 05:00	Workday
Apr	2016	13	08:00 - 05:00	Workday
Apr	2016	14	08:00 - 05:00	Requested Absence
Apr	2016	15	08:00 - 05:00	Requested Absence
Apr	2016	16	08:00 - 05:00	Requested Absence
Apr	2016	17	08:00 - 05:00	Requested Absence
Apr	2016	18	08:00 - 05:00	Requested Absence
Apr	2016	19	08:00 - 05:00	Requested Absence
Apr	2016	20	08:00 - 05:00	Requested Absence
Apr	2016	21	08:00 - 05:00	Requested Absence
Apr	2016	22	08:00 - 05:00	Requested Absence
Apr	2016	23	08:00 - 05:00	Requested Absence
Apr	2016	24	08:00 - 05:00	Requested Absence
Apr	2016	25	08:00 - 05:00	Requested Absence
Apr	2016	26	08:00 - 05:00	Requested Absence
Apr	2016	27	08:00 - 05:00	Requested Absence
Apr	2016	28	08:00 - 05:00	Requested Absence
Apr	2016	29	08:00 - 05:00	Requested Absence
Apr	2016	30	08:00 - 05:00	Requested Absence

Legend: Approved Absence (Green), Requested Absence (Yellow), Holiday (Red), Workday (Blue)

The Monthly Time Calendar will list all employees that report to you.

You can change the month by clicking on previous month, next month or click on the drop down for month and year.

The calendar will show

- Approved absences – AAB
- Requested Absences - RAB Holidays - HOL
- Workday – WRK

## REQUEST ABSENCE ON BEHALF OF EMPLOYEE

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

Select the employee to request an absence for

Favorites | Main Menu > Manager Self Service > Time Management > Report Time > Absence Request

### Request Absence

Shelby Smith

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 : 08/31/2016  [View Monthly Calendar](#)

End Date : 08/31/2016

\* Absence Name : Funeral Leave

Partial Days : None

Duration : 8.00 Hours

**Additional Information**

Start Time:  End Time:

**Workflow**

Allow Request By : Employee and Manager

Request As : Employee  ←

**Comments**

Requestor Comments :

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

[Return to Direct Reports](#)

\* Required Field ←

**Request as: Employee (this is recommended)** - it will automatically be approved by the supervisor

**Request as: Manager** – it will need to approved by the managers manager who entered the request because as a manager requesting it they also cannot approve it

If you choose **Request As: Employee** the request will be submitted and approved. See below it shows the request submitted by Employee and approved by the Supervisor  
**Status: Approved**

*Employee will receive an email notifying them this absence is submitted and approved on their behalf*

Workflow			
Status :	Approved		
Allow Request By :	Employee and Manager		
Request As :	Employee		
Request History			Personalize    First
Status	Name	Date	Comments
Submitted	Kelli Heiser	08/31/2016	Submitted as Request As: Employee
Approved	Catherine Greicar	08/31/2016	

If you choose **Request As: Manager** the request will be submitted and approved. See below it shows the request submitted by Employee and approved by the Supervisor

**Status: Submitted**

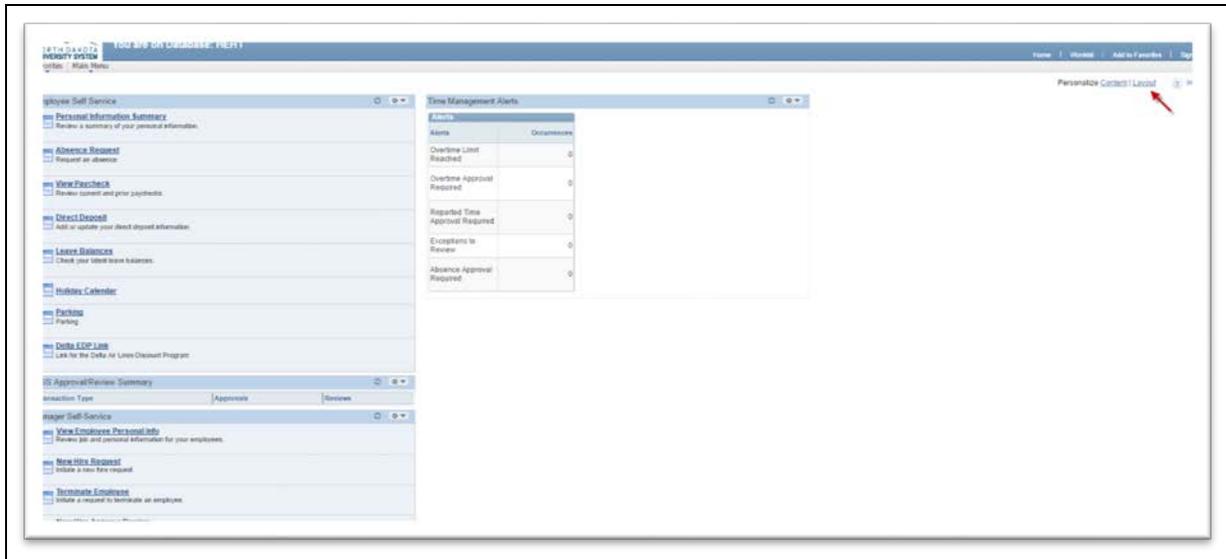
This request must be approved by the Managers Manager. Since the absence was requested as the manager the manager can't approve it and it must move to the next manager.

*Employee will NOT receive an email notifying them this absence is submitted and approved on their behalf. The employees Manager will receive an email after the manager has approved this request.*

Workflow			
Status :	Submitted		
Allow Request By :	Employee and Manager		
Request As :	Manager		
Request History			Personalize    First
Status	Name	Date	Comments
Submitted	Catherine Greicar	08/31/2016	

## EDIT PAGELETS ON HR HOME PAGE

You can redesign your pagelet if you want a different layout of want to move stuff up or down on the home page.



User arrows on left to move the different pagelets to differ areas of the home screen

