Manager Self Service Training Manual for Time and Labor- Hourly, Non-Benefited Positions (Including Work Study)

ORACLE/PEOPLESOFT

VERSION 9.1

Human Resource/Payroll
How-To Guide

HR/Payroll Office
May, 2018

TABLE OF CONTENTS

Human Resources/Payroll
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The duties of the NDSU Budget Office and Ag Budget Office include the funding and budget portions of payroll forms. They are responsible for processing funding changes, budget adjustments and retroactive distributions in relation to payroll. They are also responsible for the activation and/or inactivation of Combination Codes.

INTRODUCTION

Time & Labor is a module in Oracle/PeopleSoft HRMS used to record time worked. Various methods will be used to get time into the module:

1. Web clock - the web clock is built within Oracle/PeopleSoft which requires hourly employees to log in to punch in/out.
2. Time clocks – departments like Dining have purchased time clocks.
3. Paper time slips - if access to a computer or time clock is not feasible.
4. FAMIS (used mostly by Facilities Management)

The Time and Labor process is used only to record *time worked.*

Regardless of the method used, at the end of each pay period the time entered will be submitted to the supervisor for approval.

Employees must record their time daily, either via the web clock, by the time clock, by paper time slip or through FAMIS. All time must be recorded by one of those 4 methods by the last day of each pay period. Supervisors must approve the time worked the day after the last day of each pay period, at the very latest. **If the time isn't entered, or isn't approved prior to the deadlines, the employee will not get paid until a subsequent pay period.**

The business process under this new process is as follows:

1. Employee enters and submits hours worked.
2. Supervisor approves reported time.
3. Approved time is sent to payroll and paid the next payday.

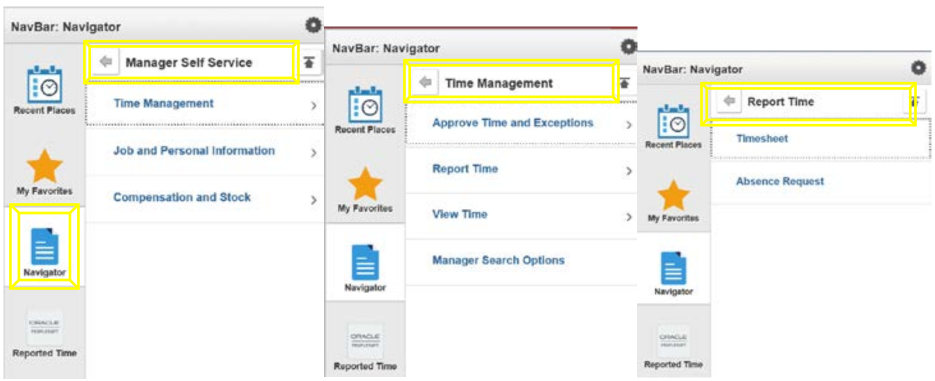
Please Note: There will be no more late time slips sent to HR/Payroll for entry. Late time will be entered by the supervisor and paid on the next available payday.

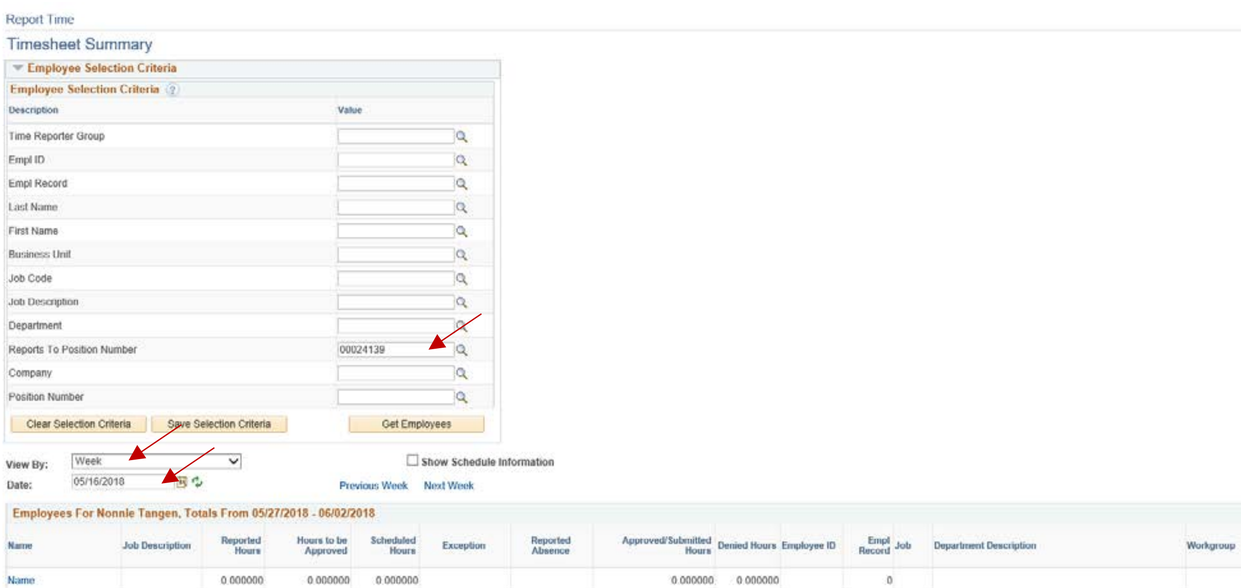
ENTERING TIME FOR HOURLY EMPLOYEES

Supervisors may need to enter time for hourly employees who may have forgotten to punch in/out (missing punch), late time, if the system is down, or to enter a paper time slip if the web clock or time clock is not feasible.

Please Note: There will be no more late time slips sent to HR/Payroll for entry. Late time will be entered by the supervisor and paid on the next available payday.

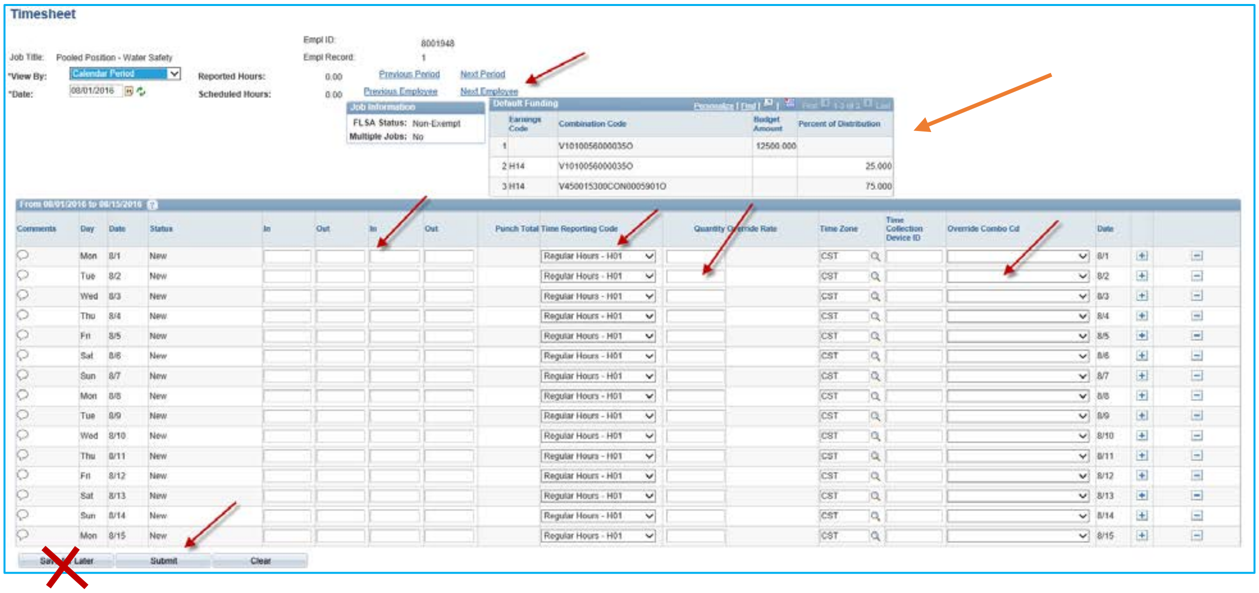
Navigation: Navigator > Manager Self Service > Time Management > Report Time > Timesheet





The **Reports to Position Number** defaults in and is the position number of the supervisor logging in. Selecting Get Employees will display employees reporting to the Reports to Position number. Other search criteria can be used such as Empl ID or Last Name.

Enter the date that is desired. **Useful Tip**: Use the first day of the pay period, which is the 1^{st} or the 16^{th} of each month. Click **Get Employees** button.

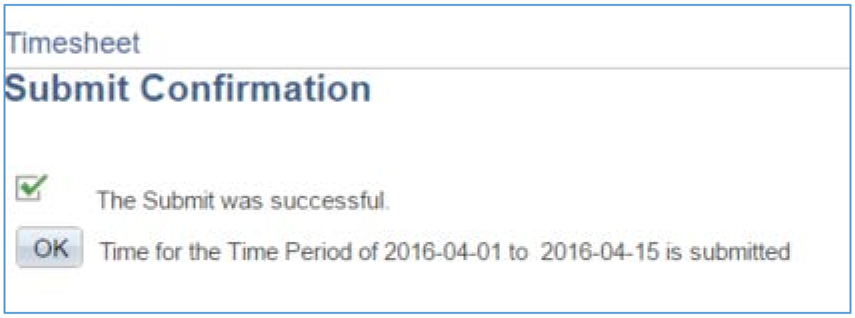


Enter the In/Out punch information as appropriate for the days worked. Or, the **Quantity** field can also be used for a total number of hours per day. Also enter the Time Reporting Code for either Regular Hours-H01 for regular hours worked or Work Study Hours-H14 for work study hours worked. ***Only hourly student employees in approved work study positions with agreements signed though Financial Aid and Scholarships should select Work Study Hours-H14 from the drop down. All other hourly employees will use Regular Hours-H01.*** Verify and override (if needed) the Combination Code for a particular day by looking up the desired funding. ***Work Study Hours-H14 must follow the Combo Code in the Default Funding box. For questions on default funding please contact the appropriate Budget office.***

Click **Submit**. A timesheet can only be approved, and subsequently paid, upon clicking **Submit**. **Save for Later** does not approve the timesheet for payment. Do not use the **Save for Later**.

NOTE: Hours that are not submitted by the deadline each pay period will not be paid to the employee.

Upon Submit the following confirmation message appears. Select OK.



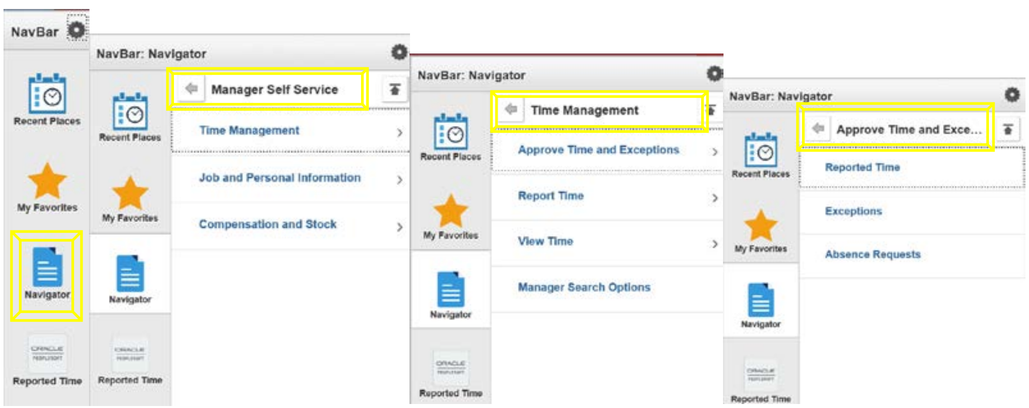
APPROVING TIME FOR HOURLY EMPLOYEES

Approval of time worked needs to occur for an employee to be paid and must occur prior to the deadline.

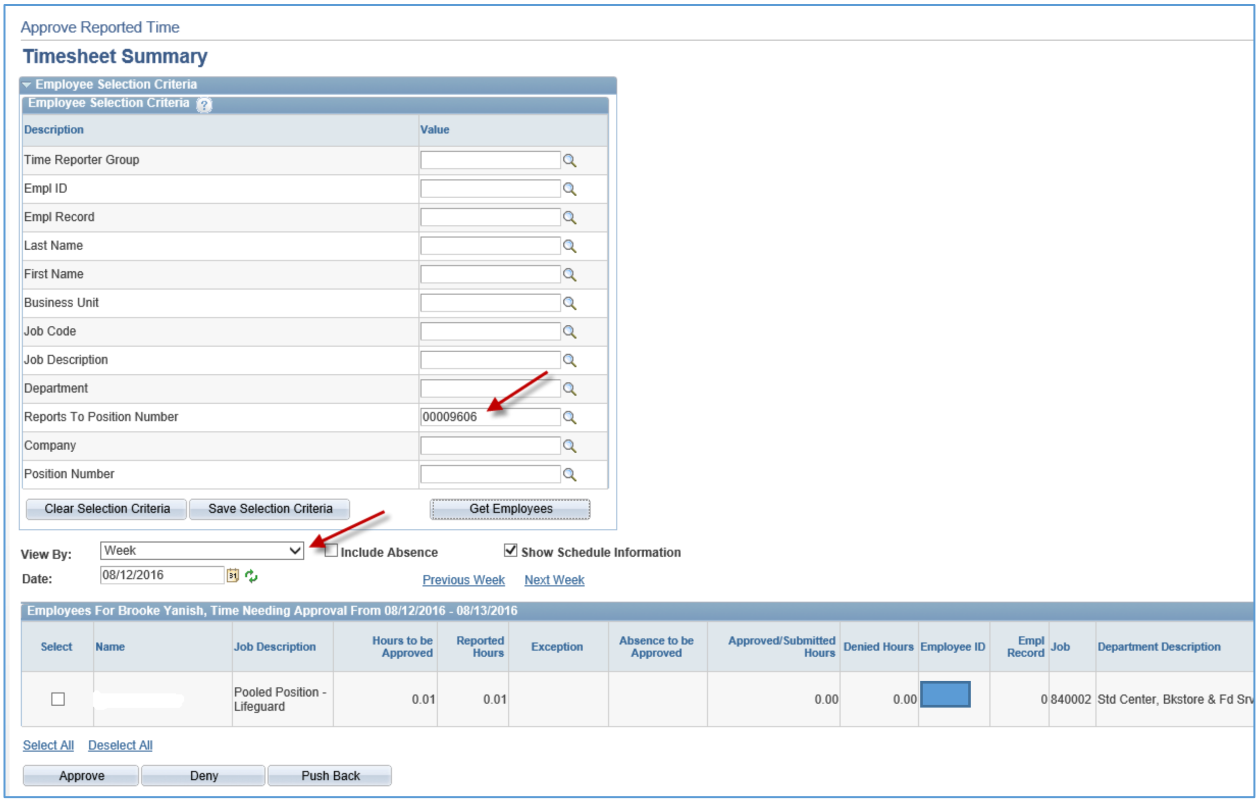
Also know that in North Dakota, in cases of a dispute over wages, the employer must provide a written notice to the employee of the amount of wages being questioned. The employer is still responsible to pay the balance of the wages on the regular payday. So if a supervisor doesn't agree with all the time submitted, they should be careful to approve the time which is not under dispute.

NOTE: Supervisors will not be able to view employees reporting to them on this page if no hours have been submitted. Employees will only show on this page if they have hours submitted that need approval.

Navigation: Navigator > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time



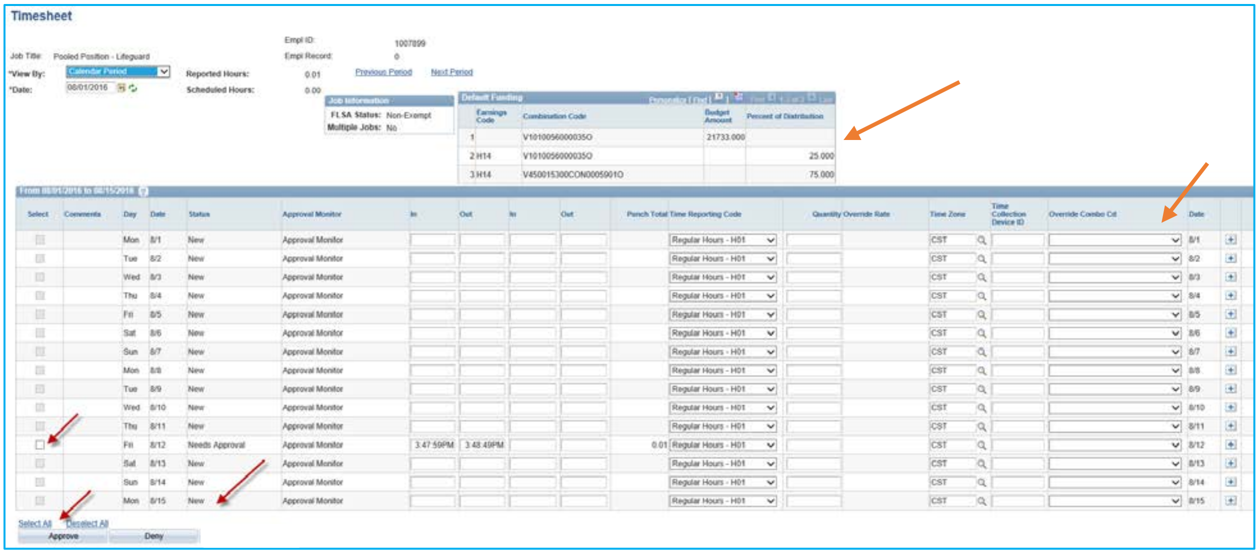
The screen defaults as below, with the position number of the supervisor logging in populated:



Enter the desired date or leave as the current date. The View By can be changed by clicking on the drop down. **USEFUL TIP:** Changing the **View By** field to *All Time Before* the current date will display all hours that need to be approved. Or change the **Date** field to the beginning of the pay period and leave the **View By** field set to *Week*.

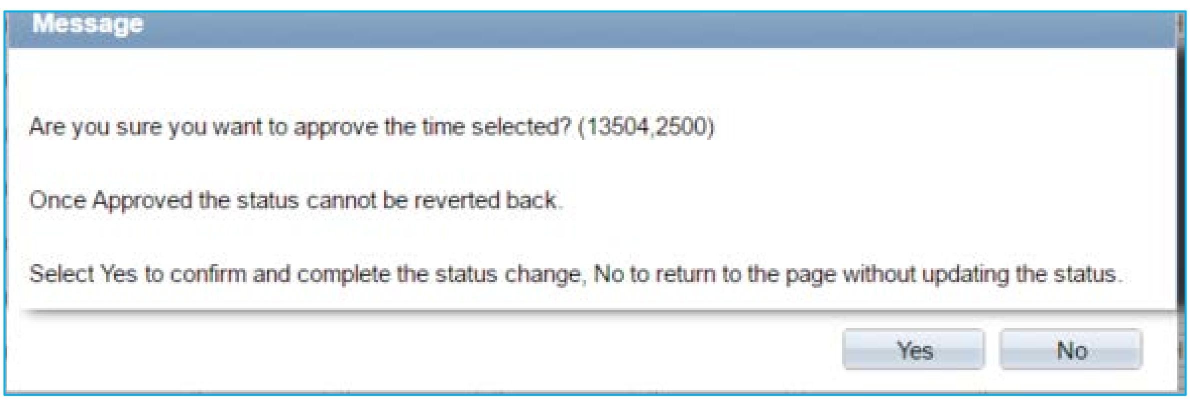
Once you have set your parameters, click **Get Employees**. Then select the first employee to review/approve and continue to click Next Employee if more than one employee needs time approved.

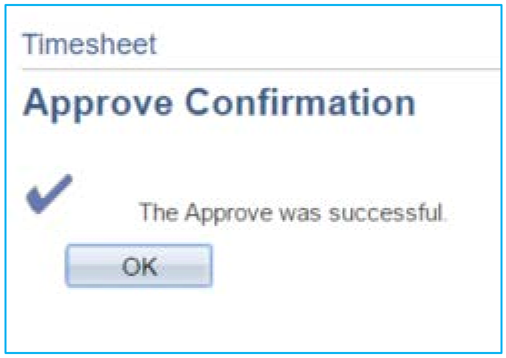
Carefully review the employees In/Out punch times and Punch Total time. Also review the Time Reporting Code for either Regular Hours-H01 for regular hours worked or Work Study Hours-H14 for work study hours worked. ***Only hourly student employees in approved work study positions with agreements signed though Financial Aid and Scholarships should select Work Study Hours-H14 from the drop down when they punch in/out. All other hourly employees will use Regular Hours-H01.*** Verify and override (if needed) the Combination Code for a particular day by looking up the desired funding. ***Work Study Hours-H14 must follow the Combo Code in the Default Funding box. For questions on default funding please contact the appropriate Budget office.***



Review comments from employee, if there are any.
Select each row or click **Select All** to choose all rows at once and take action. Then click the **Approve** button.

Approve Messages:




Timesheet
Approve Confirmation
The Approve was successful.
OK

REPORTS AND QUERIES TO VALIDATE YOUR PAYROLL

HE Pay Register 2

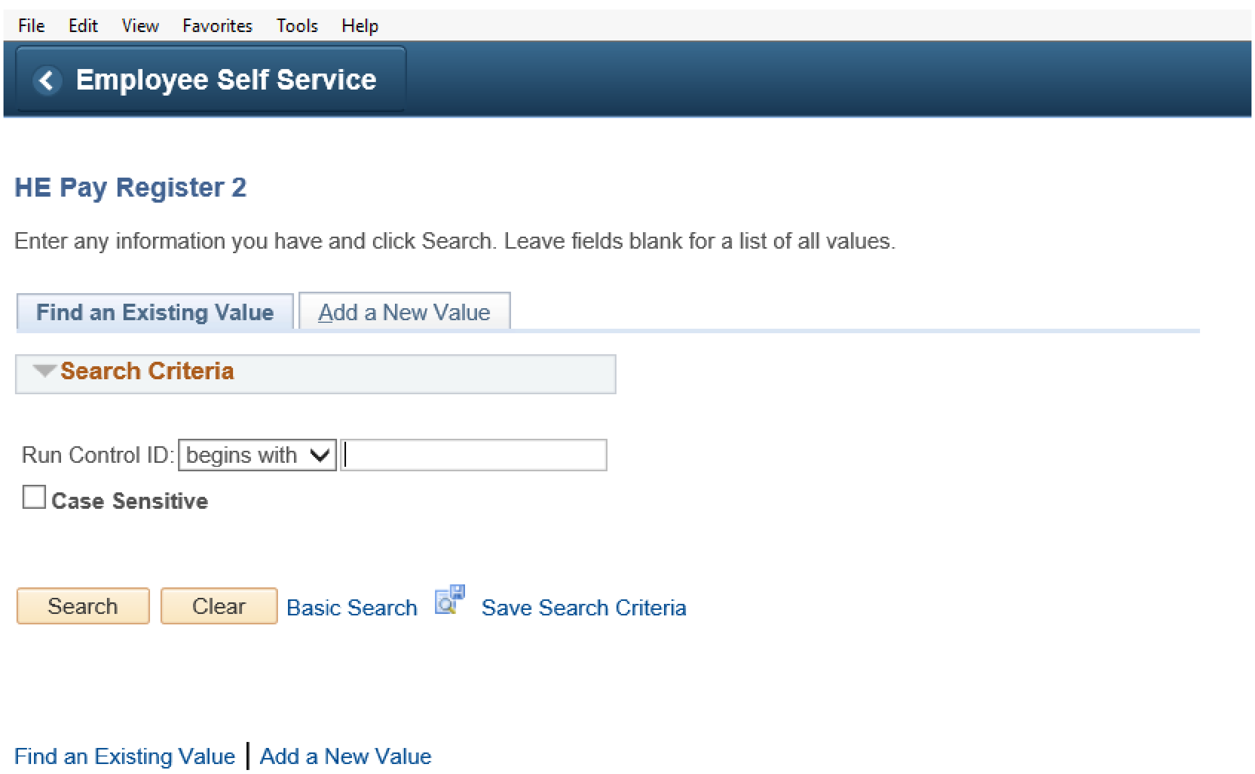
This report is your Payroll Register (Proof)

This report is available to departments to review their payroll, prior to the final calculation (during the time entry period). Department personnel are strongly encouraged to review a proof before the 6:00 p.m. deadline for time entry. Any discrepancies found after that time should be reported to Payroll immediately.

Navigation: Navigator > Payroll for North America > Payroll Processing USA > Pay Period Reports > HE Pay Register 2

Department personnel with DEPT_ADMIN access in HRMS will be able to view and/or print the HE Pay Register 2 (Proof) for their department:

Follow the navigation above to get to the run control page for this report. The run control page will look like this:



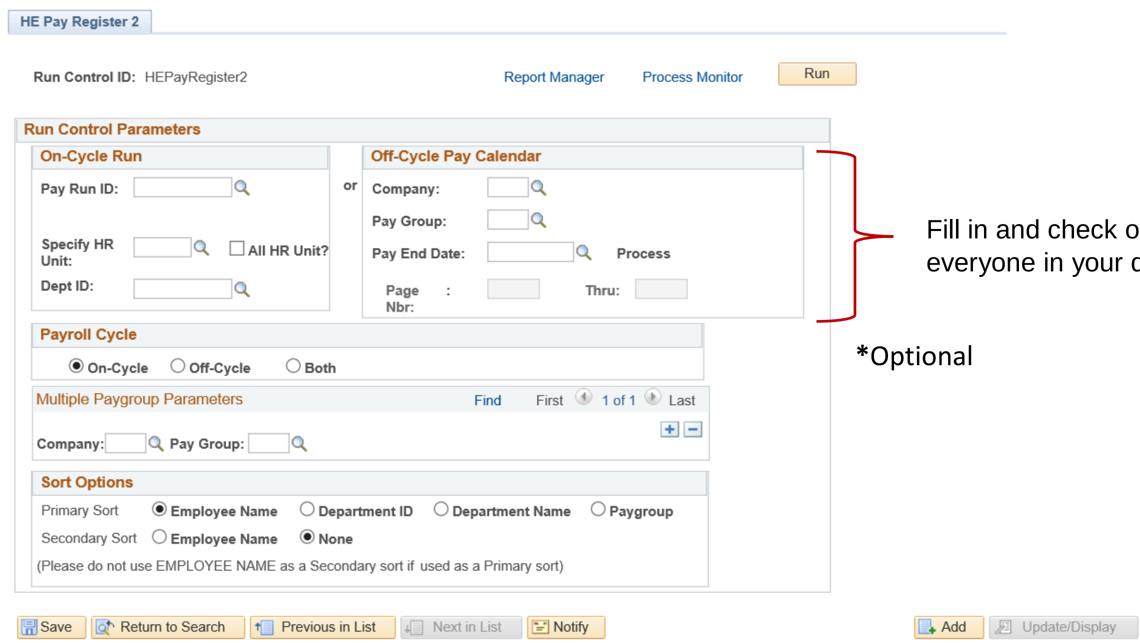
If you have accessed this page previously, please enter the Run Control ID you have created and click the search button.

If you have never accessed this page before, you will need to click on the *Add A New Value* tab. The following page will appear:

Enter a Run Control ID of your choice. The recommended Run Control value to enter: **HEPayRegister2**. Click the Add button.

This report can be run back to January, 2005.

The following screen appears:



Fill in and check on-cycle to see everyone in your department.

*****Optional

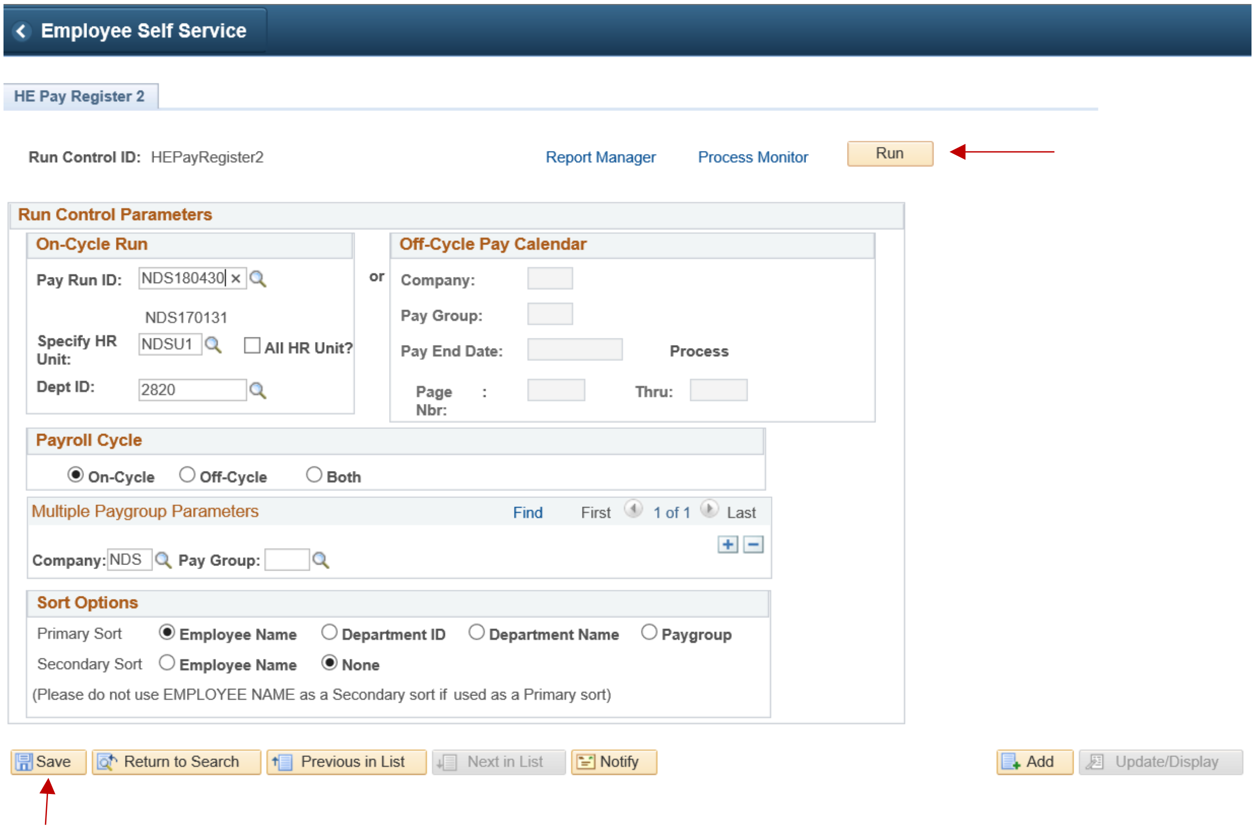
Enter the Pay Run ID. This value is NDS followed by the ending date of the pay period (YYMMDD) for which you are requesting the Payroll Register. For Example: To access a payroll register for pay period ending April 30, 2018, you would enter the following: NDS180430. For the Payroll Register for pay period ending October 15, 2006, you would enter: NDS061015.

Click off the check box for All HR Unit. This will open up the next two boxes for your input.

Specify HR Unit: NDSU1
DeptID: Enter your department number
Payroll Cycle: Click the ‘On Cycle’ button

∗ **Multiple Pay Group Parameters:** Used if you would like to limit the report to only being a certain pay group. Company is ‘NDS’. Pay Group is either ‘NDB’ ‘NDC’ ‘NDN’.
NDB – Salaried employees including 12 month benefitted, Grad students, and Part-Time Academic Staff.
NDC – Less than 12 month benefitted faculty.
NDN – Hourly Employees: Work on an hourly, timeslip basis.
Sort Options: Primary Sort: ‘Employee Name’, Secondary Sort: ‘None’

If you were requesting the April 30, 2018 Payroll Register for department 2820, the screen would look like this:

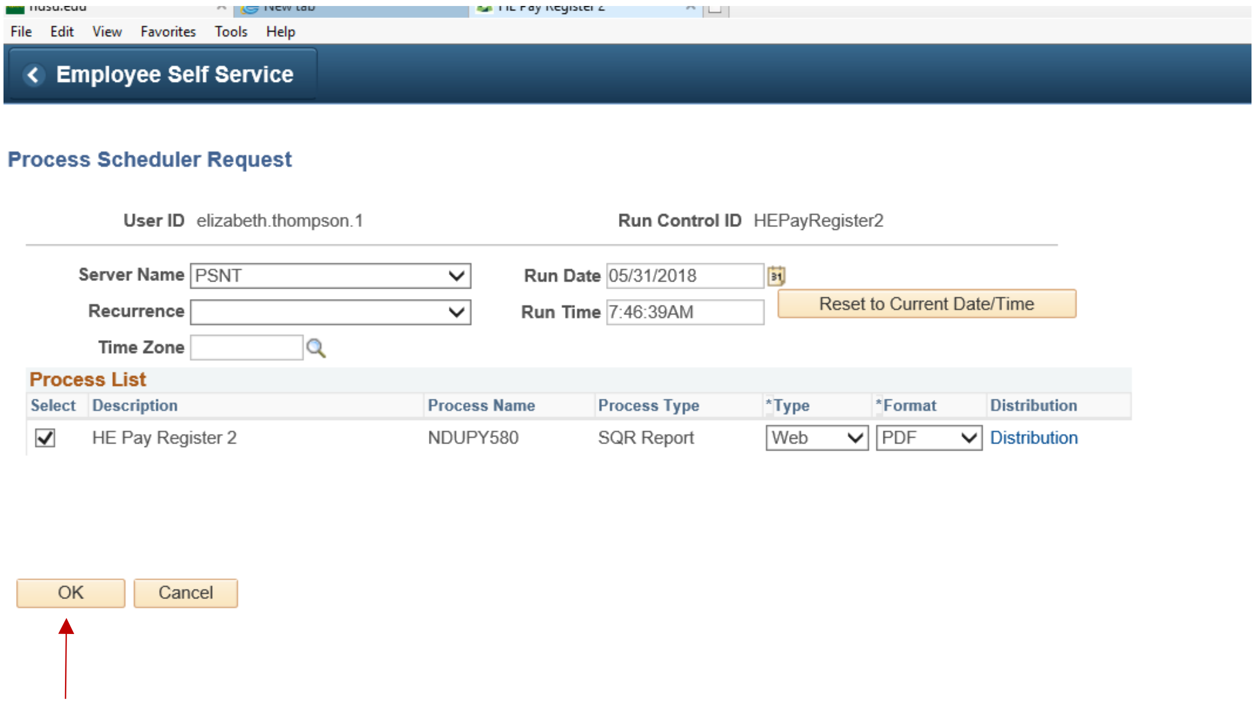


The magnifying glasses next to each box can be used to search for appropriate values, if you do not know what they are. Only the left side of the screen needs to be completed.

Click Save.

Click Run.

The following screen appears:

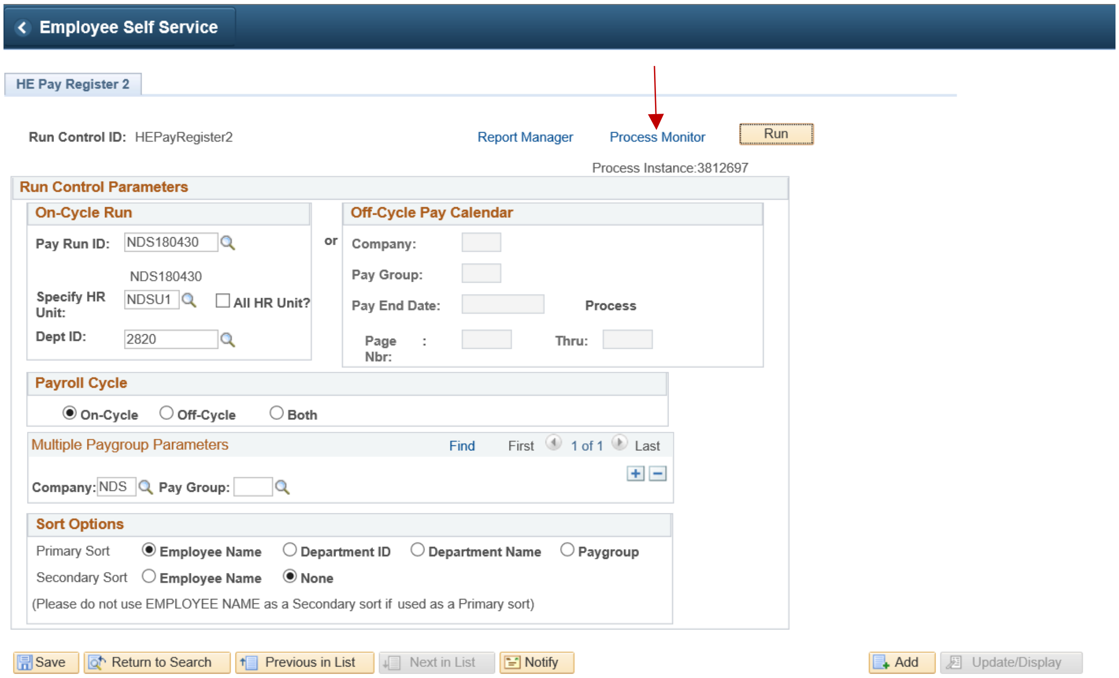


Verify the following:

- the Server Name is PSNT
- the HE Pay Register 2 box is checked
- Type is Web
- Format is PDF

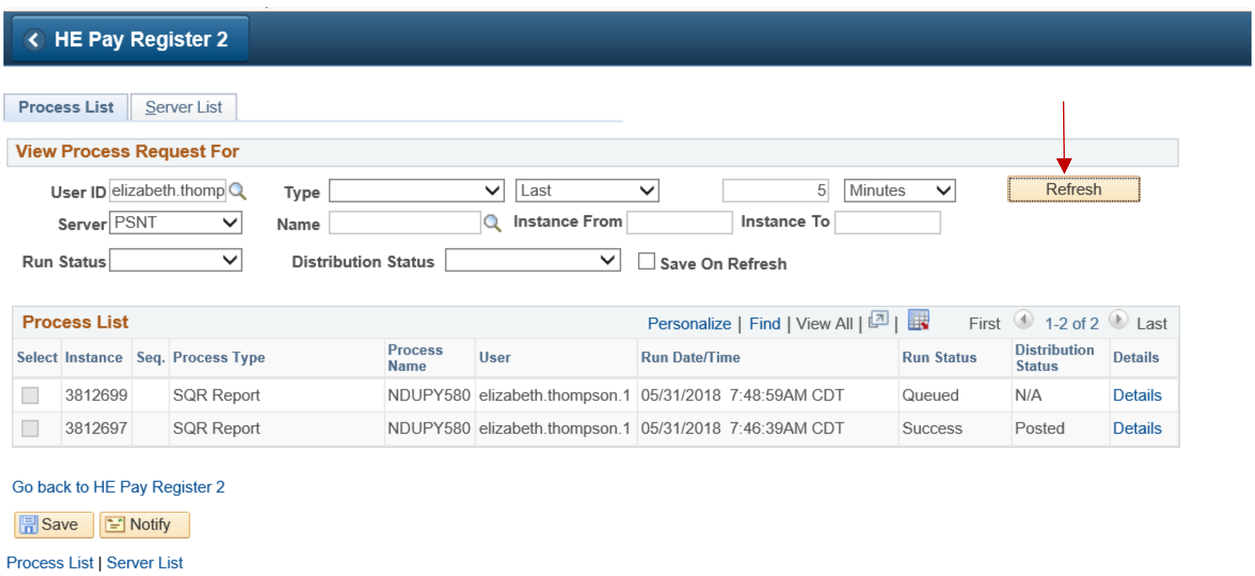
Click OK

The following screen appears:



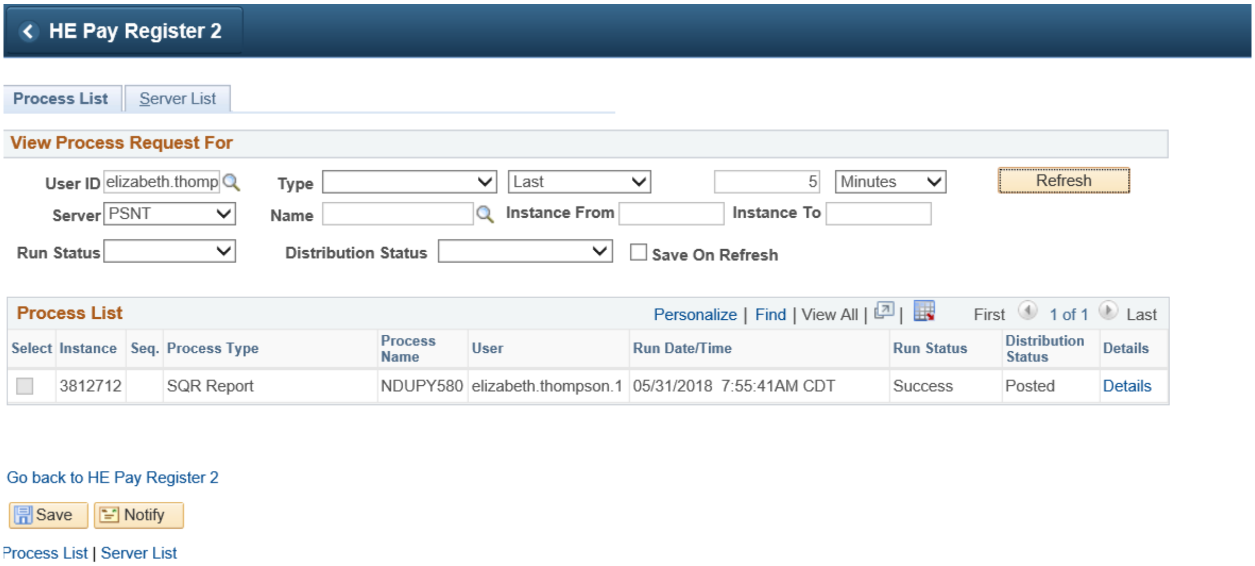
Click on the Process Monitor hyperlink.

The following screen appears:

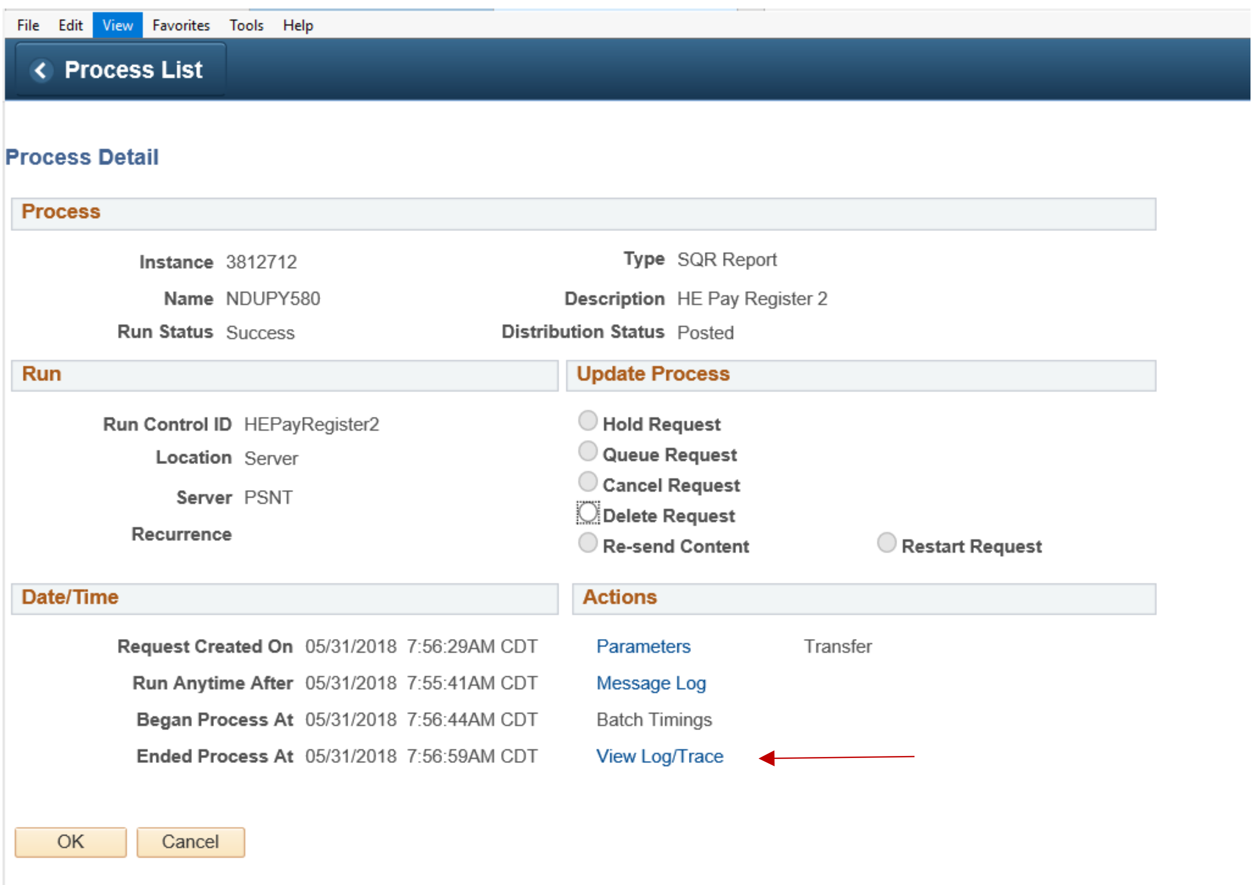


If Success does not appear immediately under the Run Status (located under the dark blue bar in the middle of the screen), Click on Refresh periodically until the Run Status is Success and Distribution Status is Posted. The screen will not update status, unless you click the Refresh button.

When Success and Posted appears, Click on the Details hyperlink, located to the right of the word Posted (immediately below the dark blue bar).

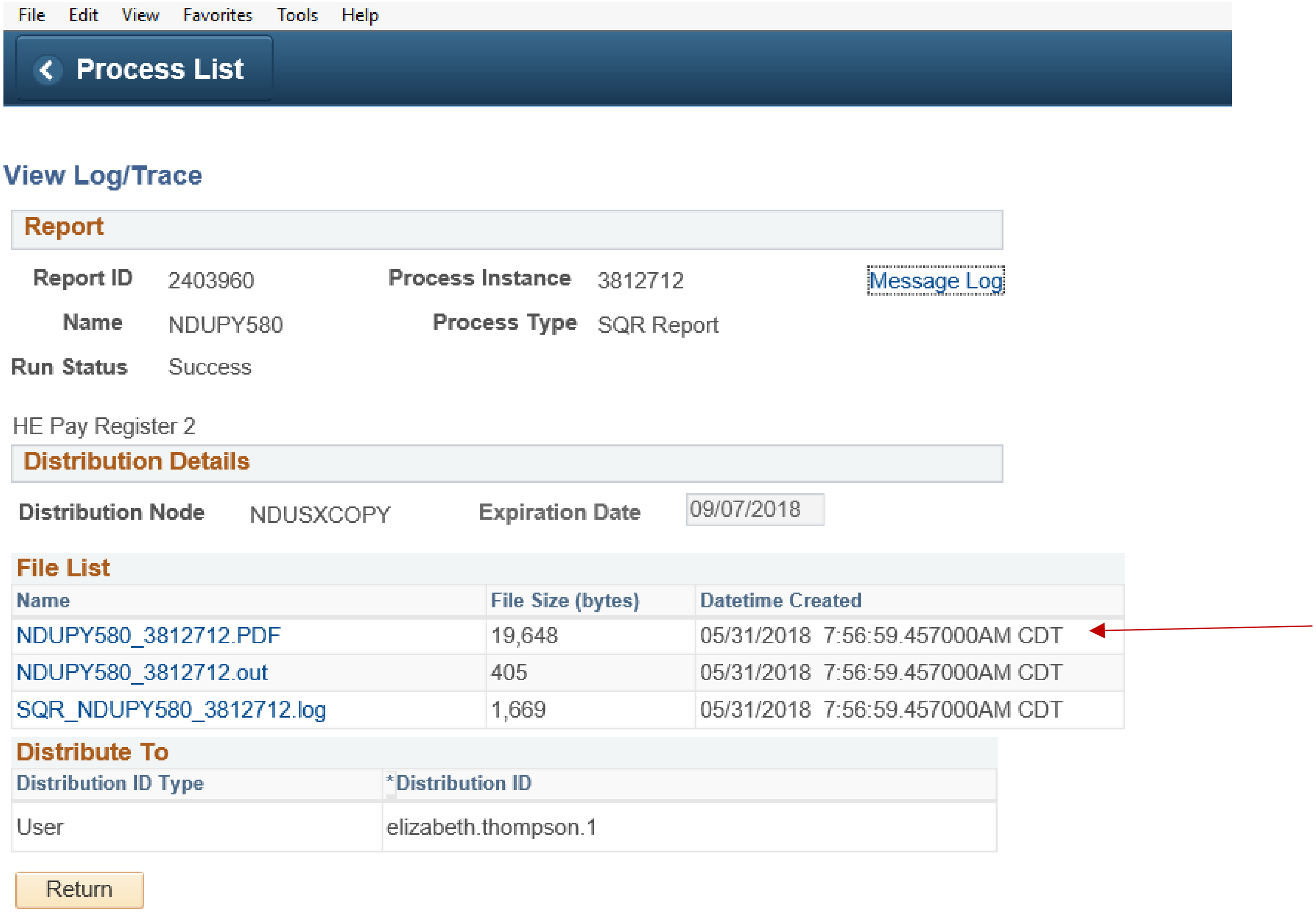


The following screen appears:



Click on the View Log/Trace hyperlink.

The following screen appears:



You must have Adobe Acrobat on your computer to view this report. Click on the top file name that ends with a *.PDF extension* to view the report. A report will appear containing the data for your department for the selected pay period.

This report may be viewed on line or printed. *Unless you need a printed copy, you do not need to print this report for future reference. This report will be available for you to recreate through this process any time in the future.* In the future, a decision may be made to purge certain records after a specified number of years. If this decision is made, you will be notified as to the length of time these reports will be available.

After you have viewed or printed the report, click on the red X box in the top right corner of your screen. This closes the document and returns you to the Process Detail screen.

Click Return.

This returns you to the Process Detail page.

Click Ok. This returns you to the Process Monitor page.

Click on the hyperlink at the bottom of the screen that says Go Back to HE Pay Register 2. This will return you to your starting screen.

```
                                                                PeopleSoft
Report ID:  NDUPY680                                  HR Departmental Pay Register Report                                   Page No.  1
Company:    NDS North Dakota State University                                                                              Run Date 09/08/2014
Pay Period End:07/31/2010                                        On Cycle CONFIRMED                                          Run Time 14.22.30
                                                             Selected Page    1 to ****
Employee Name/ID          Form ID      PayGroup                             <----- REGULAR -----> <--- OVERTIME ---> <-------- OTHER -------->
Dept. ID    DeptName      Business Unit      Pos Num   Hr. Rate Account Code        Hours       Earnings    Hours   Earnings   Type Hours      Earnings     Gross Pay
Check Date  Check No.


Aakre,Allyson N           ADVNDS      NDR  00023967  14.18 S                       40.00        568.72                                                  1,229.17 A
0623986                   NDSU1                                                    40.00        568.71
3140        Human Resources/Payroll                                                 8.00        111.74
08/13/2010 A000000000612941                                                         4.50-        63.82-                        H22   4.50         63.82

                          Employee totals   00023967                               83.50      1,163.35     0.00     0.00             4.50         63.82


Boyda,Sheila Kay          ADVNDS      NDR  00022946  15.41 S                       40.00        607.08                                                  1,335.58 A
0682910                   NDSU1                                                    40.00        607.08
3140        Human Resources/Payroll                                                 8.00        121.42
08/13/2010 A000000000612942


                          Employee totals   00022946                               88.00      1,335.58     0.00     0.00             0.00          0.00


Erickson,Colette D        ADVNDS      NDR  00019230  37.66 S                       40.00      1,483.56                                                  3,680.50 A
0206166                   NDSU1                                                    40.00      1,483.56
3140        Human Resources/Payroll                                                 8.00        296.71
08/13/2010 A000000000612943                          S307423140R                                                          H64                189.40
                                                     S307423140R                                                          H64                189.40
                                                     S307423140R                                                          H64                 37.87
                                                                                   16.00-       602.56-                        H22  16.00        602.56

                          Employee totals   00019230                               72.00      2,661.28     0.00     0.00            16.00      1,019.22


Fluge,Kate L              ADVNDS      NDR  00027364  14.64 S                       40.00        576.71                                                    418.69 A
0682486                   NDSU1                                                    40.00        576.70
3140        Human Resources/Payroll                                                 8.00        115.34
08/13/2010 A000000000612944                                                        16.00-       234.23-                        H23  16.00        234.23
                                                                                                                               H01               850.06-

                          Employee totals   00027364                               72.00      1,034.52     0.00     0.00            16.00        615.83-



Source Legend:  E = Batch Final  L = On-line Final  O = On-line  N = Not added to Gross Pay
```

PeopleSoft

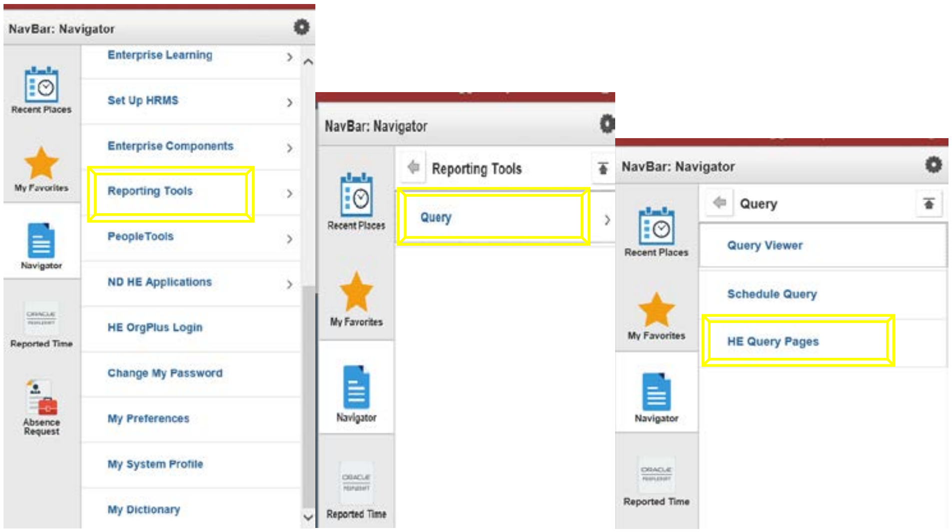
Report ID: NDUPY680 | HR Departmental Pay Register Report | Page No. 5
Company: NDS North Dakota State University | | Run Date 09/08/2014
Pay Period End:07/31/2010 | On Cycle CONFIRMED | Run Time 14.22.31

Selected Page 1 to ****

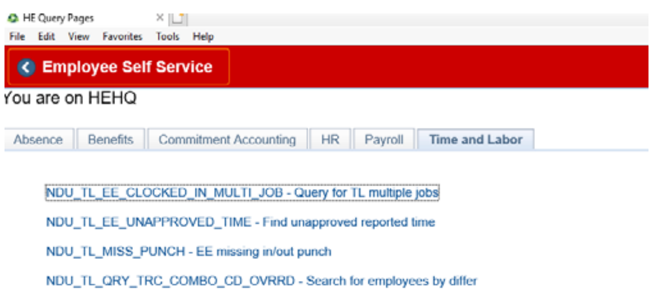
Employee Name/ID	Form ID	PayGroup			REGULAR		OVERTIME		OTHER		
Dept. ID / DeptName	Business Unit	Pos Num	Hr. Rate	Account Code	Hours	Earnings	Hours	Earnings	Type Hours	Earnings	Gross Pay
Check Date / Check No.											
Department Total					1,013.70		4.40		178.74		22,718.74
Pay Group Total					0.00	19,234.01	0.00	146.50	0.00	3,338.23	22,718.74
Pay Period Total					0.00	0.00	0.00	0.00	0.00	0.00	22,718.74
Company Total					0.00	0.00	0.00	0.00	0.00	0.00	22,718.74
Grand Total					0.00	0.00	0.00	0.00	0.00	0.00	22,718.74
						0.00		0.00		0.00	

Source Legend: K = Batch Final L = On-line Final O = On-line N = Not added to Gross Pay

Navigation: Navigator > Reporting Tools > Query > HE Query Pages



There is a tab for each type of queries, see Time and Labor queries below:



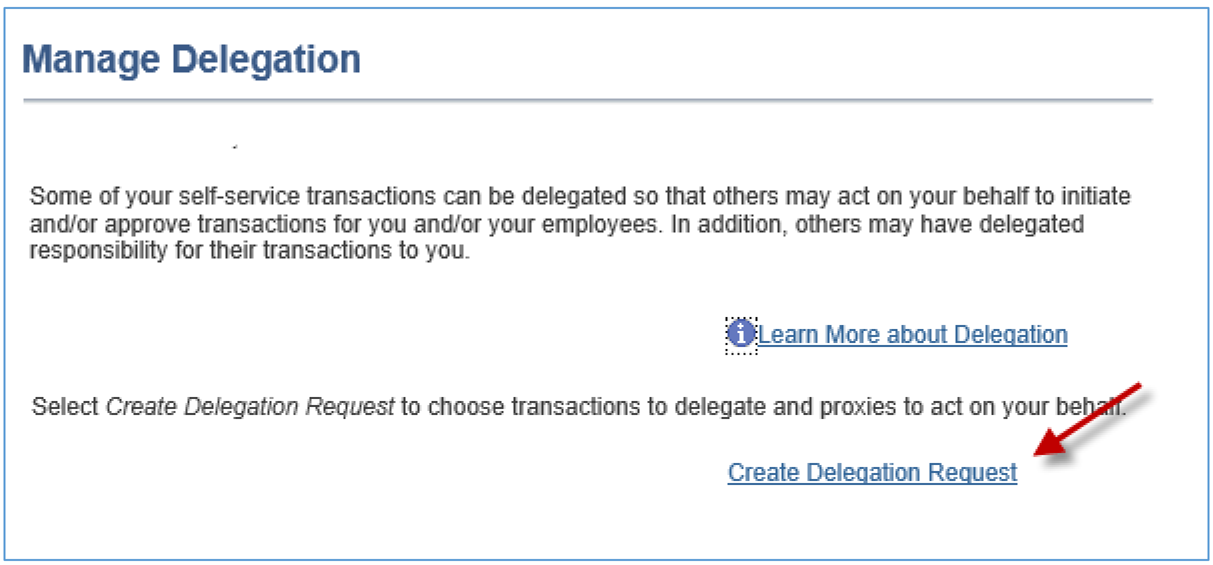
DELEGATE APPROVAL OF REPORTED TIME

Supervisors have the ability to delegate the approval of time to others. The person delegated to is called a proxy. When the delegation is submitted, the proxy will receive an email notification. The proxy must accept the delegation in order to be able to perform the task. Once accepted, the delegation remains until the end date is reached or until the delegator revokes the delegation.

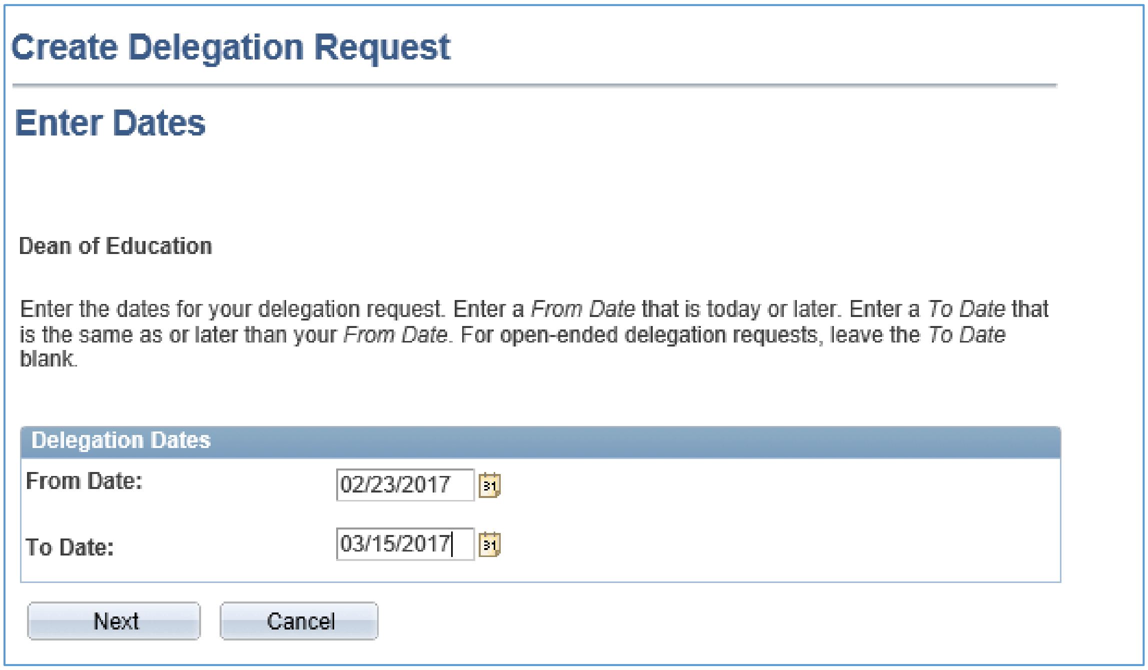
NOTE: This is only for approving time at **MSS > Time Management > Approve Time and Exceptions > Reported Time**. The proxy will <u>not</u> have access to update the timesheet at the **MSS > Time Management > Report Time > Timesheet.** This means only Web Clock In/Out punches can be delegated to a proxy. If a department is not using the Web Clock, and is using paper time slips instead, only the supervisor for the time slip position and that supervisor's supervisor will be able to approve time.

Navigation: Navigator > Self Service > Manage Delegation

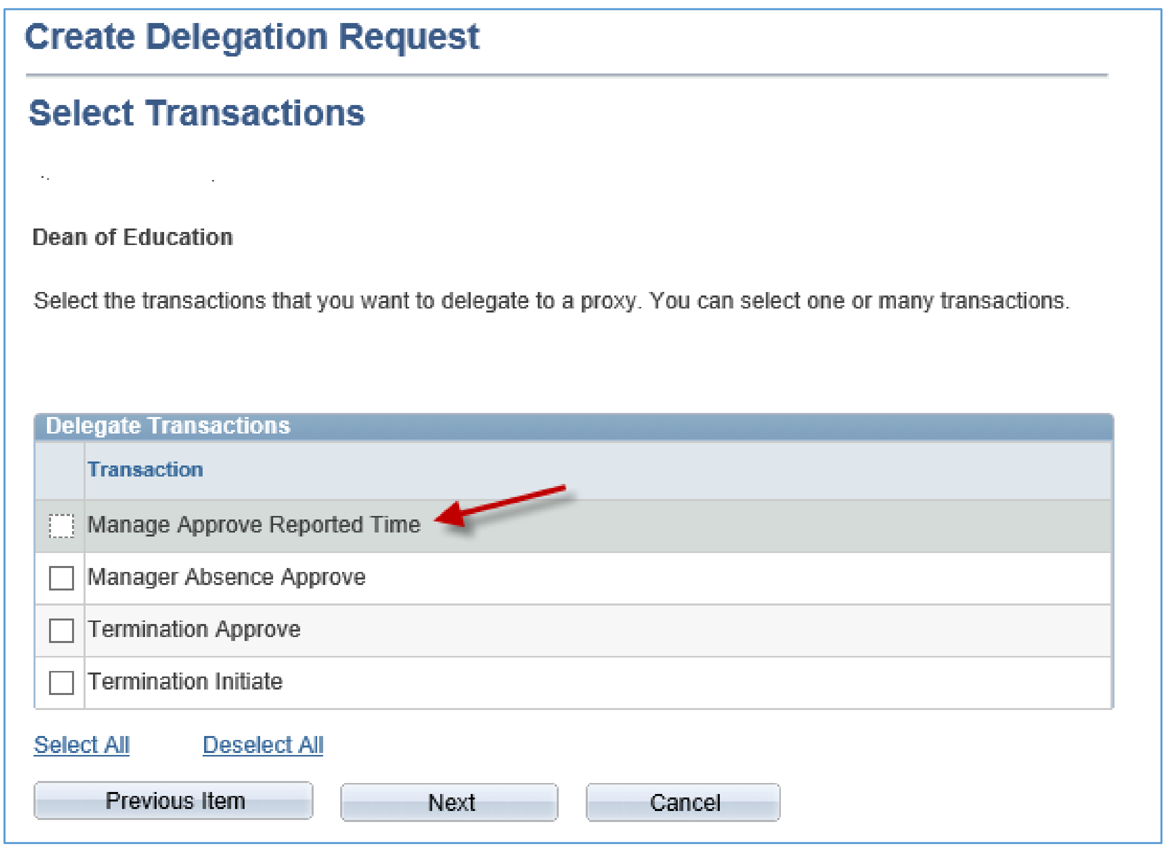
Click **Create Delegation Request** link.



Enter the dates of the delegation request and click **Next**.



Select the transactions to be delegated.



The **Select Proxy by Hierarchy** screen will appear. This screen displays persons within your hierarchy that can be selected as proxies. Select the radio button next to the name of the person to be designated as the proxy. The Search by Name hyperlink can be used to search for proxies outside the hierarchy.

Click **Next** and **Submit**. The proxy selected will receive an email and must go to Manage Delegation to accept the delegation. Once the delegation is in place the approval can only be done by the proxy or the delegator's manager.

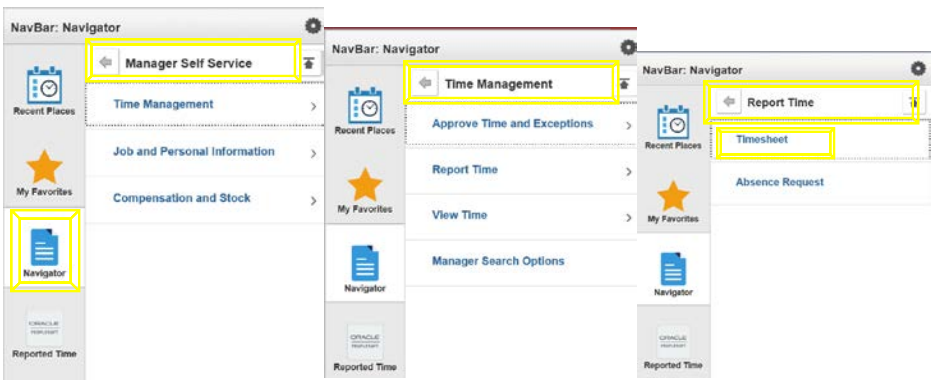
SCENARIOS

Scenario 1: Hourly Employee Forgets to Punch; Missing Punch

This page should be used to enter time by the supervisor for an hourly employee who may have forgotten to punch in/out or missed a punch or turned in late time.

Please Note: There will be no more late time slips sent to HR/Payroll for entry. Late time will be entered by the supervisor and paid on the next available payday.

Navigation: Navigator > Manager Self Service > Time Management > Report Time > Timesheet



Enter or correct the information as shown on previous pages, entering positive time for hourly employees.

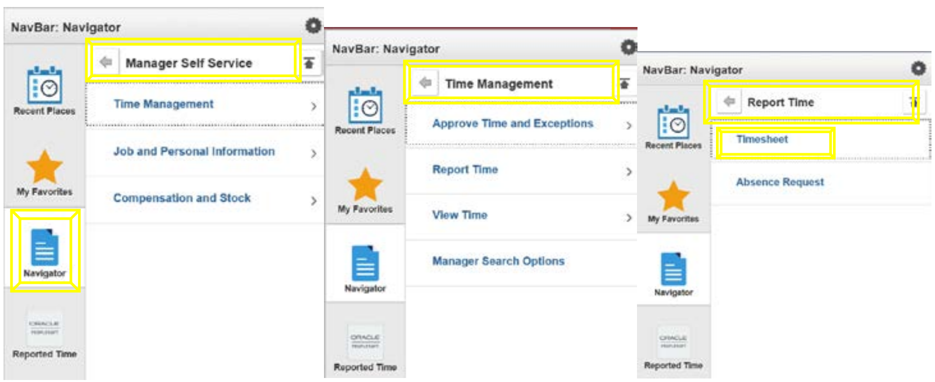
Once the hours are entered and submitted the hours will need to be approved on another page. The navigation is at: ***Navigator > Manager Self Service > Time Management > Approve Time and Exceptions > Timesheet***.

Scenario 2: Employee Has Time to Enter From Prior Pay Period.

This page should be used to enter time by the supervisor for an hourly employee who may have forgotten to punch in/out or missed a punch or has late time.

Please Note: There will be no more late time slips sent to HR/Payroll for entry. Late time will be entered by the supervisor and paid on the next available payday.

Navigation: Navigator > Manager Self Service > Time Management > Report Time > Timesheet



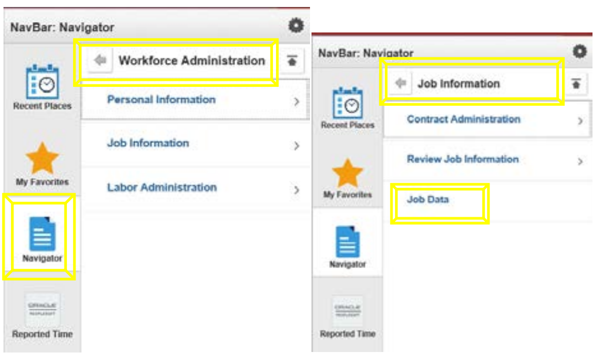
Enter or correct the information as shown on previous pages, entering positive time for hourly employees.

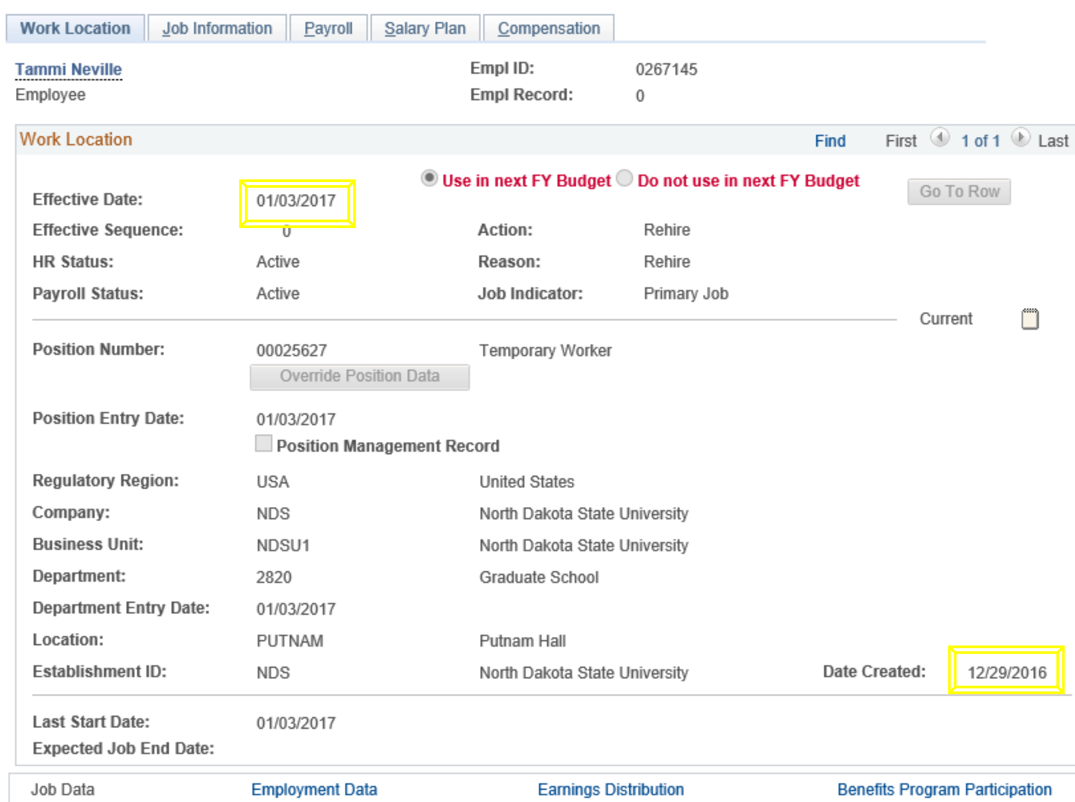
Once the hours are entered and submitted the hours will need to be approved on another page. The navigation is at: ***Navigator > Manager Self Service > Time Management > Approve Time and Exceptions > Timesheet***.

Scenario 3: Not All Employees Reporting to Me are Listed

In the event an employee(s) does not appear in the Report Time-Timesheet screen the most likely cause is the employee hasn't been hired or an incorrect date range is being used for a time when the employee is not active. Go to Job Data to check the effective date of the employees' job record. Also, check the Date Created date in the right corner of the job data screen.

The navigation is: ***Navigator > Workforce Administration > Job Information > Job Data***.





In the event an employee(s) does not appear in the Approve Time and Exceptions-Timesheet screen the most likely cause is the employee hasn't submitted any time or all time has already been approved. The supervisor can navigate to the Report Time-Timesheet screen to verify hours have been entered and the status. Depending on the status is the action the supervisor should take. If all statuses are New there are no hours to approve so the employee would not appear in the approval page. If the status is Approved there are no more hours to approve so again, the employee would not appear in the approval page. If the status is Approval In Process contact the HR/Payroll office for assistance.

Please Note: There will be no more late time slips sent to HR/Payroll for entry. Late time will be entered by the supervisor and paid on the next available payday.