CHAPMAN UNIVERSITY

PeopleSoft Time & Labor – Reporter Training Guide

PeopleSoft Time and Labor

PeopleSoft time and labor will be replacing the current Web ATO, Administrator Time Off Report. Hardcopy timesheets with manager signature will no longer be required. Approvals will be tracked within PeopleSoft. PeopleSoft time and labor will interface directly with Payroll and eliminate the external manual interface process of the legacy timecard system into PeopleSoft payroll.

Terms

<u>Timesheet</u> – enter exception time off or no time off taken, example vacation & sick days

<u>Calendar Period/Week/Day</u> – options to change the view on your timesheet to enter exception time off by day, week or calendar period (monthly pay period)

<u>Time Reporting Code (TRC)</u> – 3 digit numeric codes for tracking absence exception time. The list of TRC codes (absence type) will vary based on the employees administrative classification
> 000-No Time Off This Month
> 010-Holiday (populated by the Time Administration process automatically, no user entry)
> 015-Jury Duty
> 020 Bereavement
> 045-University Closure (Senior Staff approved closure power outage, etc)
> 069-Unpaid Absence
> 100-Vacation
> 118-Vacation in lieu of Sick Pay
> 120-Sick
> 125-Sick Family

<u>Time Administration</u> – A background job that converts Reported Submitted time into Payable Time and Exceptions.

<u>Exceptions</u> – Rules have been built into the Time & Labor system. Some rules will show error status upon entry and some rules will show exception status after Time Administration has run.

<u>Override Reason</u> – Managers are advised not to change employee timesheets, however timesheets can be updated by managers. An override reason should be entered if a timesheet update is required by the manager. Timesheet updates by managers will be tracked on an override report by the payroll department. In general, only the employee or payroll administration should change the timesheet.

<u>Submitted</u> – Timesheet exceptions entered status after it's been submitted.

<u>Reported Time</u> – Timesheet exceptions entered before the Time Administration process has been run. After the Time Administration process the exceptions will convert to Payable Time.

<u>Payable Time</u> – Reported time that is submitted will convert to Payable Time after the Time Administration job runs. This is a background process that will run nightly and on demand as needed by the payroll administrator. Payable Time is moved to the manager's queue for review, approval, pushback or denial.

<u>Launch Pad</u> – Monthly summary to view time and status updates.

<u>Closed</u> – Status showing time entered has been approved by the manager and sent to payroll.
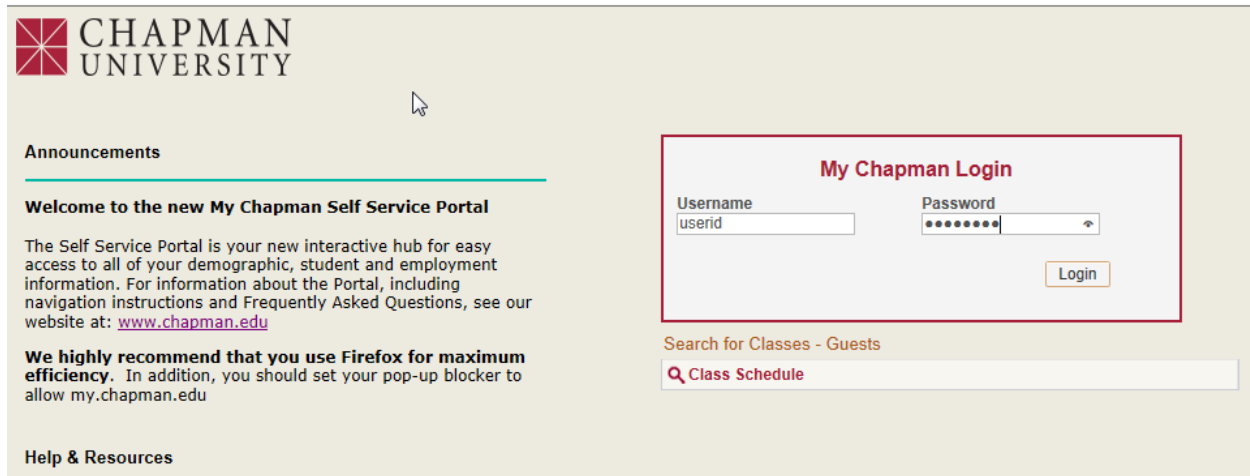
Deny – will permanently save the record as denied status in the reporting tables, the item is still available for modification by the employee

Pushback – will not save the record as pushback status in the reporting tables, the item is still available for modification by the employee. Pushback is the recommended action if timesheet needs to be corrected and resubmitted by the employee.
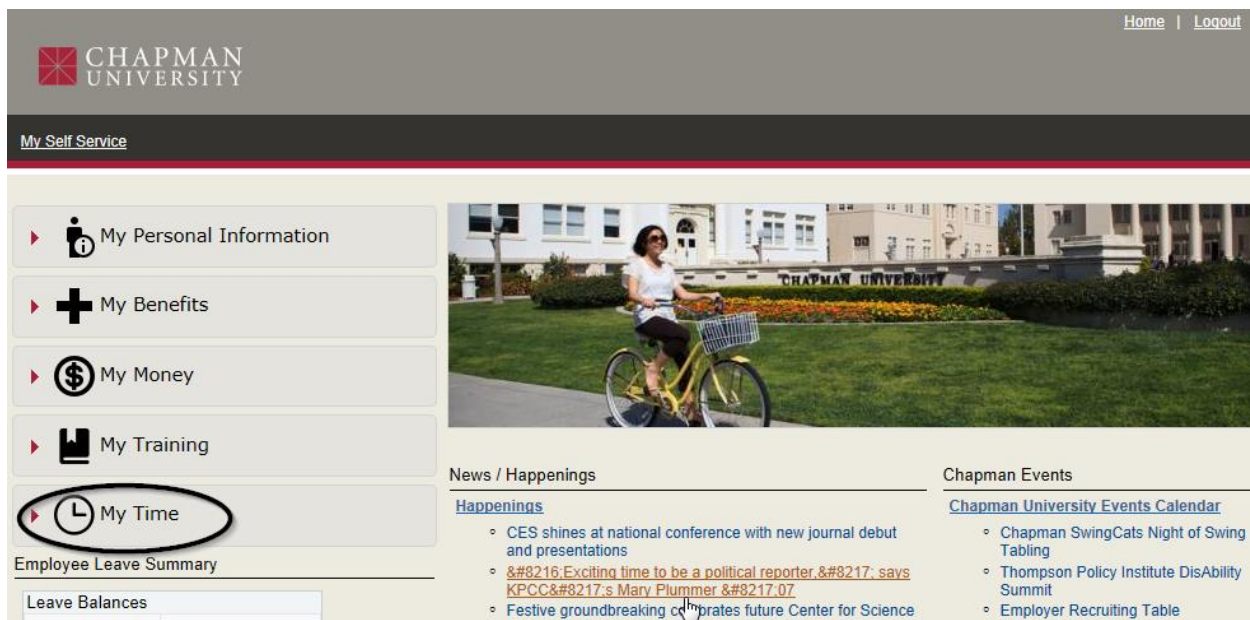
Accessing Time & Labor

Link for My Chapman Self Service Portal
https://my.chapman.edu

- Enter your user ID and password

- Click on My Time to enter time or review time

- My Time Reporting – this link is used to enter time
- Time and Labor Launch Pad – this link is used to review entry in a calendar view

Default Timesheet

Click on the My Time Reporting link and the default Timesheet will open.

Changing the view to Calendar Period, Day or Week

- Click on the arrow on the View By selection box and select the input format you prefer.
- Update the date to the time period for entry
- Click on the green arrows to update the page

Entering a Timesheet with Exceptions

Based on the view selected, you may need to scroll to the right to access the Time Reporting Codes
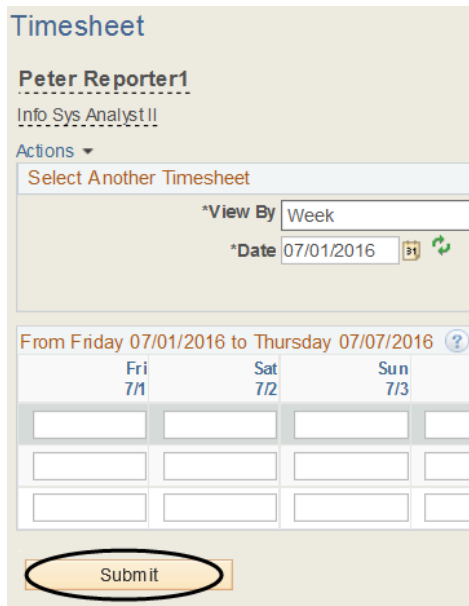
Wed 3/30	Thu 3/31	Total	Time Reporting Code	Override Reason		
					+	−
			000 - NO TIME OFF THIS MONTH		+	−
			015 - Jury Duty		+	−
			020 - Bereavement			
			045 - University Closure			
			069 - Unpaid Absence			
			100 - Vacation			
			118 - Vacation in lieu of Sick Pay			
			120 - Sick			
			125 - Sick-Family			

- Using the drop down arrow, select the code for entry

The default sheet has 3 blank rows. You can click the +/- buttons to add or delete rows. It is not necessary to delete blank rows.

Mon 7/4	Tue 7/5	Wed 7/6	Thu 7/7	Total	Time Reporting Code	Override Reason		
	8				015 - JuryDuty		+	−
		8			020 - Bereavement		+	−
			8		120 - Sick		+	−

Once you have entered your time, you can Submit the time. Comments can be entered after you Submit. Comments can be viewed by the approvers and payroll department.

Timesheet

Peter Reporter1

Info Sys Analyst II

Actions ▼

Select Another Timesheet

*View By Week

*Date 07/01/2016

From Friday 07/01/2016 to Thursday 07/07/2016 ⑦

Fri 7/1	Sat 7/2	Sun 7/3	

Submit

- Click the Submit button

Message

I confirm that I worked my full schedule during this reporting period. (20001,1)

OK

- A confirmation message will display, click.

Timesheet
Submit Confirmation

☑ The Submit was successful.

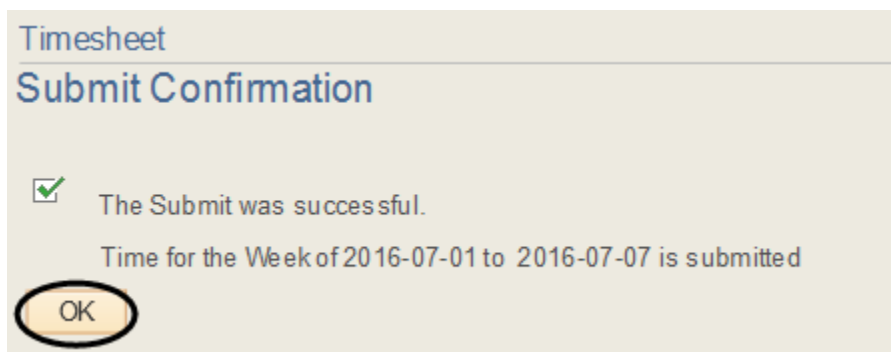Time for the Week of 2016-07-01 to 2016-07-07 is submitted

OK

- Click OK again to return to the timesheet.

Entering Comments

After the time has been Submitted, the Add Comments icon is available to enter comments. Click on the icon to add comments.

Comments are required for bereavement to determine the relationship of the deceased. Comments are optional for other TRC's.

Peter Reporter1								Employee ID
Info Sys Analyst II								Empl Record
Actions ▾								Earliest Change Date

Select Another Timesheet

*View By [Week ⌄]

*Date 07/01/2016 [📅] ↻   Previous Week   Next Week

Reported Hours 24.00   Print Timesheet

From Friday 07/01/2016 to Thursday 07/07/2016 ⑦

Fri 7/1	Sat 7/2	Sun 7/3	Mon 7/4	Tue 7/5	Wed 7/6	Thu 7/7	Total	Time Reporting Code
				8.00			8.00	015 - Jury Duty
					8.00		8.00	020 - Bereavement
						8.00	8.00	120 - Sick

[Submit]

(**Reported Time Status**) Summary Leave / Compensatory Time Exceptions Payable Time

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

Date	Reported Status	Total	TRC	Description	Add Comments
07/05/2016	Submitted	8.00	015	Jury Duty	💬
07/06/2016	Submitted	8.00	020	Bereavement	💬
07/07/2016	Submitted	8.00	120	Sick	💬

OK – save and return to the previous page

Apply – save the comment

Add Comments - add additional comments box

Once a comment is entered, the icon will update showing comments. Note comments can never be deleted once it is saved.

Entering a Timesheet without Exceptions

000 – No Time Off This Month should be entered on the last calendar day of the month, however it can be entered on any day of the month. You can select the Day, Week or Calendar Period view and input the TRC code and 1 hour. The amount has no payroll impact and will not interface to payroll as a deduction. This is how PeopleSoft alerts the manager that no time was taken off during the period.

Do not select this TRC along with other TRC's during the month. This TRC is to be used only if you have no other exception TRC's. You will be contacted by payroll or your manager to make corrections if the 000 TRC is selected along with other TRC's.

Submitting a Timesheet

After you enter time, click the Submit button. You can submit time throughout the month or at the end of the period.

After submitting time, the Reported Status will update to Submitted. The Reported Status will remain as submitted after the time has been approved and taken by payroll.

Title Display Options

The default Timesheet will display the Job Code description. Place your cursor over the description and hover over, the detailed Job Information will display with the Position title.

Exceptions

The manager can approve the exception online or email you to make a change to the original submitted time.

<u>Approvals by Manager</u> - If the manager approves the exception, the exception will no longer be displayed on the summary tabs after time administration updates the time.

<u>Change request by Manager</u> – If the manager emails you to change the original submitted time, you will need to go into your timesheet and update the TRC code and re-submit

Note: A holiday rule has been created to identify sick days as an exception on the day before or after a holiday. Managers will need to approve the exception for use of sick time.

The icon indicates an exception exists. Work with your manager to resolve the exception either by manager approval or manager requesting you to update your timesheet.

Reported Time Status	Summary	Leave / Compensatory Time	Exceptions	Payable Time

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

Date	Reported Status	Total	TRC	Description	Add Comments	Exception
04/25/2016	Submitted	8.00	015	Jury Duty	💬	🔲
04/28/2016	Submitted	8.00	100	Vacation	💬	
04/29/2016	Submitted	8.00	100	Vacation	💬	

Viewing your timesheet and statuses

Viewing the Timesheet

The timesheet statuses can be viewed on the summary tabs on the bottom part of the timesheet page.

Reported Time – time entered and Submitted
Time entered will display on this tab as a submitted status after you submitted your time.   After Time Administration is run, the Payable Time or Exceptions tab will populate and become available for the manager to approve.

Reported Time Status	Summary	Leave / Compensatory Time	Exceptions	Payable Time

Reported Time Status   Personalize | Find | 🔳 | 🔲   1-4 of 4

Date	Reported Status	Total	TRC	Description	Add Comments	Exception
03/24/2016	Submitted	8.00	120	Sick	💬	⏱️❗
03/29/2016	Submitted	8.00	015	Jury Duty	💬	
03/30/2016	Submitted	8.00	020	Bereavement	💬	
03/31/2016	Submitted	8.00	120	Sick	💬	

Summary – displays a summary of hours entered by day or week

Reported Time Status	Summary	Leave / Compensatory Time	Exceptions	Payable Time

Reported Time Summary   Personalize | Find | 🔳 | 🔲   1-5 of 5

Category	Total	Week 1 (5/1-5/7)	Week 2 (5/8-5/14)	Week 3 (5/15-5/21)	Week 4 (5/22-5/31)
Regular-NTO	16.00	16.00			
Vacation	16.00	8.00			8.00
Sick	16.00				16.00
Total Reported Hours	48.00	24.00			24.00
Time with no Category					

Leave Compensatory Time – this tab displays the Sick, Vacation and Family Sick balances. The View Detail icon will show detail accruals and time taken. Click on the ? icon to display the Chapman University definition.
Note: In accordance with the general provisions of federal and state laws, Chapman University does not permit compensatory time.

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	91.67	0	720	📑
Leave	Vacation	63.67	0	200	📑
Leave	FamilySick	20.00	0	80	📑

Exceptions – Exceptions will display on the Exceptions tab and also on the main Reported Time Status tab.

Reported Time Status	Summary	Leave / Compensatory Time	Exceptions	Payable Time

Exceptions ⑦   Personalize | Find | 🔲 | 📰   1 of 1

Date	Exception ID	Exception Source	Status	Exception Severity	Explanation	Comment
03/24/2016	XCX00004	Time Administration	Unresolved	High	Using benefit one day before/after holiday	

Payable Time - Payable status will update from Needs Approval, Approved, Closed. The view can be updated based on the radio button selections to view by TRC code or in detail.

Reported Time Status	Summary	Leave / Compensatory Time	Exceptions	Payable Time

Payable Time Viewing Option

○ By TRC and Status
⦿ By TRC, Status and Day
○ Show In Detail   View Full Detail

Payable Time ⑦   Personalize | Find | 🔲 | 📰   1-4 of 4

Date	TRC	Description	TRC Type	Payable Status	Quantity
03/25/2016	010	Holiday	Hours	Closed	8.00
03/29/2016	015	JuryDuty	Hours	Closed	8.00
03/30/2016	020	Bereavement	Hours	Closed	8.00
03/31/2016	120	Sick	Hours	Closed	8.00

Viewing the Launch Pad

The launch pad is available from the main My Chapman Self Service Portal under My Time
https://my.chapman.edu

Time and Labor Launch Pad

Pete Reporter1   Employee ID

Technical Admin I   Empl Record 0

March *Month 03 - March   2016   Reported Hours   View
2016

                Selection In View Reported Hours   Previous Month   Next Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	8.00 24 XE	25 Spring Bre	26
27	28	8.00 29 E$	8.00 30 E$	8.00 31 E$		

Forecast Payable Time

Links   Go

Self Service

Time Reporting

Legend	
X	Exception
P	Reported Punched Time
E	Reported Elapsed Time
$	Payable Time
F	Forecasted Payable Time
R	Recommended Attendance Actions

The drop down arrow will allow you to change the view from Reported Hours to the various selections below. You can view the Payable Hours, Reported Hours or Number of Exceptions. The other items are not applicable to administrators.

Forecasted Payable Hours
Number of Exceptions
Payable Hours
Reported Hours
Scheduled Hours

Changes after Submission, Approval & Managing Exceptions

Timesheets are open to make adjustment for 90 days prior and 30 days future. Any status can be changed – Needs Approval, Approved, or Closed. If the period calendar is closed, contact the payroll administrator.

Timesheets can be changed by either updating a row, deleting a row or adding a row.

The following step are required to update a row & resubmit
1. Change the hours or TRC code on the row
2. Click the Submit button

The following 3 steps are required to delete a row & resubmit
1. Delete Row
2. Click the Yes-Delete button
3. Click the Submit button

- Delete the row using the - button

- Click the Yes-Delete button

- Click the Submit button

Notifications

Notifications will be sent out for the following conditions

- Approval by your manager
- Pushback and Denial
- Timesheet changed by your manager or payroll administrator

Out of Office

Time reporting can only be entered by the employee. Out of office delegate is not allowed. Out of office delegation is only allowed for managers who approve timesheets.

Pilot group for manager approval if out of office - Employees print their timesheet and give it to the delegate. The delegate will sign and give the printed timesheet to the payroll administrator for approval.

Changes in Paystub Reporting

Prior period adjustments will now display on the paystub as individual line items with dates associated with the hours. Example – May paystub will show April sick days. The net impact to the totals hours will not change.

Changes in Holiday Approval Process

Holiday hours will be created in Payable Time after the Time Administration process has run. Holidays will be auto approved by the administrator.