UNIVERSITY OF ALBERTA

PeopleSoft HCM

HRS Workforce Administration

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Created on 7/10/2017 3:49:00 PM
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HRS Workforce Administration

Overview

This section will provide an understanding of the features and functions within PeopleSoft HCM that are related to the responsibilities of the Central Human Resource Services team.

Objectives

Upon completion of this section you will have a general understanding of:

- Changing an Existing Delegation as a Delegation Administrator
- Creating a New Delegation on Behalf of an Approver
- Running the Approval Notification Process
- Entering or Adjusting Time on Behalf of an Employee
- Reassigning an Outstanding Transaction
- Approving Outstanding Payable Time Transactions
- Running the Mass Approval Process
- Running the Time Administration Process
- Viewing General Inquiry Job Page
- Understanding the Academic Increment Page

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.
Changing an Existing Delegation as a Delegation Administrator

In this topic you will learn how to change an existing approval delegation using the Delegation Administrator role.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Administer Delegation

1. Changing an existing approval delegation is a two step process.
   
   Step 1. Revoke the existing delegation
   Step 2. Add a new delegation

2. In the Administer Delegation page, enter the Employee ID of the Delegator into the Delegator field.

   For example purposes, enter "1001720".
3. **Click the** **Search** **button.**

   ![Search Button](image)

4. **Select the line of the person to revoke and Click the** **checkbox** **option.**

   ![Checkbox Option](image)

5. **Click the** **Revoke** **button.**

   ![Revoke Button](image)

6. **Click the** **Yes - Continue** **button.**

   ![Yes - Continue Button](image)

7. **Click the** **OK** **button.**

   ![OK Button](image)
8. When you are returned to the **Administer Delegation** page, Click the **Add Delegation Request** link.

9. Enter the Employee ID of the person you are changing the delegation for, into the **Empl ID** field.

   For example purposes, enter "**1001720**".

10. Click the **Search** button.

11. Enter or Select the From Date

    Click the **Choose a date (Alt+5)** button.

12. For example purposes, click the **May 23, 2016** date.
13. You can either select a To Date or leave it blank.

   Click the **Choose a date (Alt+5)** button.

14. For example purposes, click the **May 31, 2016** date.

15. Select the Transaction Name

   Click the **Search** button.

16. Click the **TL Approve Payable Time** link.

17. Click in the **Proxy** field.

18. Enter the Employee ID of the Proxy (Delegate) into the **Proxy** field.

   For example purposes, enter "**0000252**".

19. Press **[Tab]**.
20. Confirm the name of the Proxy and Click the **Save** button.

21. Congratulations! You have completed the training on how to change an existing approval delegation.

   **End of Procedure.**

---

**Creating a New Delegation on Behalf of an Approver**

In this topic you will learn how to create a new delegation on behalf of an Approver.

---

**To Begin the Online Tutorial:**

- Click the **Try it!** button located in the top left of the screen and follow the instructions provided.

---

**Procedure**

**Navigation Path:** Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Add Delegation Request
1. In the **Add Delegation Request** page enter the Employee ID, of the person you are acting on behalf of, into the **Empl ID** field.

   For example purposes, enter **"1001720"**.

2. Click the **Search** button.

3. Enter or Select the From Date.

   Click the **Choose a date (Alt+5)** button.

4. For example purposes, click the **May 16, 2016** date.

5. You can select a To Date or leave it blank.

   Click the **Choose a date (Alt+5)** button.

6. For example purposes, click the **May 31, 2016** date.

7. To select the Transaction Name Click the **Search** button.
8. In the **Look Up Transaction Name** page, Click the **TL Approve Payable Time** link.

9. Enter the Employee ID of the Proxy (Delegate) into the **Proxy** field.

   For example purposes, enter "1149304"

10. Press **[Tab]**.

11. Confirm the name of the Proxy and Click the **Save** button.

12. Congratulations! You have completed the training on how to create a new delegation on behalf of an Approver.

   **End of Procedure.**
Running the Approval Notification process

In this topic you will learn how to run the Approval Notification process. This is a custom process created to send e-mail notifications to Approvers who have outstanding transactions.

Timelines for running this process are determined by HRS for each pay period.

---

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

---

Procedure

Navigation Path: **Main Menu > Time and Labor > Approve Time > Approval Notification***

1. In the **Approval Notification*** page, Click the **Add a New Value** tab to add a new Run Control.

2. For example purposes, enter a "**APPROVAL_NOTIFICATION**" into the **Run Control ID** field.
3. Click the **Add** button.

4. **Note:** Once a run control has been created, it can be re-used the next time you need to run the same process.

   However, you will need to update the current pay period date prior to running the process the next time.

5. Click in the **Current Pay Period End Date** field.

6. Click the **Calendar (Alt+5)** button.

7. Select the Current Pay Period End Date.

   For example purposes, click the **May 15, 2016** date.

8. Click in the **Group ID** field.
9. For example purposes, enter "AP" into the Group ID field.

or

Use the look up to select a valid Group ID.

10. To search for all Group IDs beginning with "AP", Click the Look up Group ID (Alt+5) button.

11. Select only one of the following Group IDs.
    - APMONHR – Approve Monthly Hourly
    - APSEMHR – Approve Semimonthly Hourly
    - APSEMSL – Approve Semimonthly Salary
    The above groups exclude the ISS (Interim Staffing Solutions employees).
    Use the group ISSHRLY to run the process for ISS Employees.

    Note: The drop down list will include other Time and Labor Workgroups. However, only these four groups are applicable to running the Approval Notification.

12. For example purposes, click on APMONHR link.

13. Once the Group ID contains the appropriate information click the Run button.

14. Click the OK button.
15. Click the **Process Monitor** link.

   Process Monitor

16. Click the **Refresh** button.

   Once the process has run successfully, the Run Status will read "Success" and the Distribution Status will read "Posted."

17. Congratulations! You have completed the training on how to run the Approval Notification process.

   **End of Procedure.**
Entering or Adjusting Time on behalf of an Employee

In this topic you will learn how to enter time as well as adjust previously entered time on behalf of an employee.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: **Main Menu > Manager Self Service > Time Management > Report Time > Timesheet**
1. In the **Timesheet Summary** page, search for the employee requiring the time adjustment.

   Click in the **Employee ID** field.

2. Enter the Employee ID into the **Employee ID** field.

   For example purposes enter "1382695".

3. Click the **Get Employees** button.

4. Click the **Last Name** link.

5. To view a smaller time period, change the **View By** field to Week instead of Calendar Period.

6. Click the **View By** list.

7. Click the **Week** list item.
8. Enter or select the date.
   For example purposes, enter "12/01/2015".

9. Click the **Refresh Timesheet** button.

10. To Adjust an existing entry, click in the field and enter the new value.
    For example purposes, enter "3.5" into the **Wed** field.

11. To add vacation time taken on a day, click in the appropriate field and enter the value.
    Ensure you are adding the time to the line with the appropriate Time Recording Code.
    For example purposes, enter "7" into the **Fri** field.

12. Click the **Submit** button.
13. Ensure the time you submitted is for the correct period.

   Click the **OK** button.

14. Congratulations! You have completed the training on how to Enter/Adjust Time on Behalf of an Employee.

   **End of Procedure.**

---

**Reassigning an Outstanding Transaction**

As the Workflow Administrator you can reassign a transaction to another Approver. When a transaction is reassigned, the header and details are reassigned. A transaction cannot be reassigned at the detail level.

In this topic you will learn how to reassign an outstanding workflow transaction.

---

**To Begin the Online Tutorial:**

- Click the **Try it!** button located in the top left of the screen and follow the instructions provided.
Procedure

Navigation Path: **Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Monitor Approvals**

1. In the **Monitor Approvals** page, Click the **Look up Approval Process (Alt+5)** button.

2. Click the **TLPayableTime** list item.

3. Click the button to the right of the **Header Status** field.

4. Click the **Pending** list item.

5. Click in the **Approver** field.

6. Enter or select the Approver.

   For example purposes, enter "**LEVESCON**".
7. Click the **Search** button.

8. A list of outstanding time and labor transactions will be provided.

9. Click the **Check Box** next to the transaction(s) to be reassigned.

10. In the **Reassign To** field enter or select the Approver to reassign the transaction(s) to.

   For example purposes, enter "DFORTIN1" into the **Reassign To** field.

11. Click the **Reassign Selected** button.

12. Click the **OK** button.

13. The time and labor transaction has been reassigned to the selected approver.

14. Congratulations! You have completed the training how to reassign an outstanding workflow transaction.

   **End of Procedure.**
Approving an Outstanding Transaction

As the Workflow Administrator you can Approve or Deny an outstanding transaction at either the header or detail level.

In this topic you will learn how to approve an outstanding workflow transaction.

It is recommended to refrain from using the Deny feature as much as possible.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Main Menu > Workforce Administration > Self Service Transactions > Approvals and Delegation > Monitor Approvals

1. In the Monitor Approvals page, Click the Look up Approval Process (Alt+5) button.
2. Click the **TLPayableTime** list item.

3. Click the button to the right of the **Header Status** field.

4. Click the **Pending** list item.

5. In the **Approver** field, select or enter the name of the Approver with outstanding transactions.
   
   For example purposes, enter "LEVESCON" into the **Approver** field.

6. Click the **Search** button.

7. A list of the outstanding time and labor transactions assigned to the Approver will appear.

8. To review the detail transaction lines, Click the **Toggle Header and Line** button.
9. Click the **checkbox** option to select the transaction line(s) you would like to Approve.

10. Click the **Approve Selected** button.

11. Click the **OK** button.

12. The time and labor transaction has been approved.

13. Congratulations! You have completed the training on how to approve an outstanding workflow transaction.

**End of Procedure.**
Running the Mass Approval Process

In this topic you will learn how to run the Mass Approval process to approve all outstanding time transactions based on the current pay period end date and Group ID. This process is run in special circumstances only.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Main Menu > Time and Labor > Approve Time > Request Mass Approval Process

1. In the Mass Approval* page Click the Add a New Value tab.

2. Enter the appropriate Run Control ID in the Run Control ID field.

   For example purposes, enter "MASS_APPROVAL".

   For further details on creating a Run Control ID refer to the 'Creating a New Run Control ID' topic located under the HCM Reporting section.
3. **Note:** Once a run control has been created, it can be re-used the next time you need to run the same process. However, you will need to update the current pay period date prior to running the process the next time.

4. Click the **Add** button.

5. Select the Current Pay Period End Date. Click the **Choose a date (Alt+5)** button.

6. For example purposes, click the **May 15, 2016** link.

7. Enter the appropriate Group ID into the **Group ID** field. 
   - or 
   - Use the look up to select a valid Group ID
   - For example purposes, enter "APMONHR".
8. **Note:** Use only one of the following Group IDs.
   - APMONHR – Approve Monthly Hourly
   - APSEMHR – Approve Semimonthly Hourly
   - APSEMSL – Approve Semimonthly Salary

   The above groups exclude the ISS (Interim Staffing Solutions employees).

   **Note:** The drop down list may include other Time and Labor Workgroups that are not currently being used.

9. Click the **Run** button.

10. Click the **OK** button.
11. **Click the Process Monitor link.**

12. **Click the Refresh button.**

13. Congratulations! You have completed the training on how to run the Mass Approval process.

    **End of Procedure.**
Running the Time Administration Process

The core process for Time and labor is referred to as **Time Administration**. This process validates time entered (reported time) against business rules and generates payable time (time paid to employees).

The Time Administration process is run in batch twice daily (at noon and at night). However, in specific instances Central HR has the ability to run this process outside of the scheduled batch run (for example: Employee Termination).

In this topic you will learn how to run the Time Administration process.

---

**To Begin the Online Tutorial:**

- Click the button located in the top left of the screen and follow the instructions provided.

---

**Procedure**

**Navigation Path:** Main Menu > Time and Labor > Process Time > Request Time Administration

1. In the **Request Time Administration** page, Click the **Add a New Value** tab.
2. Enter the applicable run control id in the **Run Control ID** field.

   For example purposes enter "**TIME_ADMIN**".

   **Run Control ID:**

3. Click the **Add** button.

4. **Note:** Once a run control has been created, it can be re-used the next time you need to run the same process.

   However, you will need to update the current pay period date prior to running the process the next time.

5. Click the **Use Reported Time for POI** (Period of Interest) option.

   This option should never be checked. This check box will cause the Time Administration program to process FUTURE time entries, and route them for approval.

   Future transactions should not be processed until they are part of the current pay period.

   ![Use Reported Time for POI](image)

6. Enter or select the Pay Period End date in the **Process through Date** field.

   Click the **Choose a date (Alt+5)** button.

7. For example purposes, Click the **May 31, 2016** link.
8. **Note:** The **Process through Date** should always be the last day of the current pay period.

   It is suggested to process monthly payroll separately from semi-monthly payroll.

9. You can run the process by Employee ID or by Group ID.

   As well, you can enter one or more of each ID.

10. Enter the Employee ID(s) into the **Empl ID** field.

    For example purposes, enter "1258488".

    *or* Click in the **Group ID** field and select the Group ID(s) you would like to run the process for.

11. Press **[Tab]**.

12. To add another Employee ID, Click the **Add a new row (Alt+7)** button.

13. Enter another Employee ID into the **Empl ID** field.

    For example purposes, enter "1258488".

14. Press **[Tab]**.

15. **Note:** The Empl Record will always default to zero. Therefore, if you add an additional Employee ID change this field accordingly.

16. For example purposes, enter "1" into the **Empl Record** field.
17. Click the Run button.

18. Click the OK button.

19. Click the Process Monitor link.
20. Click the Refresh button.

21. Congratulations! You have completed the training on how to run the Time Administration process.

End of Procedure.

Viewing General Inquiry Job Page

In this topic you will learn how to use the customized General Inquiry Job page to search for and view job related information.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.
Procedure

Navigation Path: Main Menu > Workforce Administration > Job Information > Review Job Information > General Inquiry Job*

1. The General Inquiry Job* view allows you to search for and view information related to the Job that an employee has been assigned to.

You can search by Employee ID, Employee First Name, Employee Last Name or a combination of this information.

![Search Screen]

2. In the Search Criteria section, enter the employee related information that you have, in the appropriate fields provided.

For example purposes, enter "1523029" into the Empl ID field.

![Search Field]

3. Click the Search button.
4. The **General Inquiry Job** page will appear with your search results. All Jobs assigned to the employee, including previous jobs as well as current active jobs, will be listed.

The header area contains the Employee Name and Employee ID/Person ID.

5. The **Multiple Jobs** section provides the details of each job that the employee has been assigned to and is listed by effective date.

In the top right of this section you can find the total number of assigned job records.
6. The **As of Date** provided before each subsection indicates the effective date of the current row of the employee's job record.

7. In the example provided the employee has 3 Job Records that have been assigned to them.

   The first record is effective September 03, 2016 and the other two records are effective as of November 01, 2016.

   **NOTE:** The format of the date is dependant on how your desktop computer is set up, so the date on your computer may be in a different format than the example provided.
8. Each Job Record is a subsection within this page and has an Employee tab, a Work Location tab and a Job Information tab providing further details.
9. The Employee tab provides information related to the status of the employee and job record.

**Empl Record** (Employee Record Number) Field [1]
A system generated number used to identify concurrent jobs (multiple appointments) for an employee.

**Pay Status** Field [2]
Provides the payroll status of the employee for that employee record number.

**Job Indicator** Field [3]
Identifies if the Job record is the primary or secondary. The primary job determines the primary pay group and benefit deductions, if applicable.

**Sequence** Field [4]
Identifies the current job row when there is overlapping of dates for job information. When more than one job record exists for the same date, the highest sequence number identifies the current job row.

10. In the example provided, the employee is no longer actively working in the first Job Record as the Pay Status is 'Terminated'.

However, the 'Active' Pay Status in the following two Job Records indicates that the employee is employed and may be paid for work done on these jobs.
11. The last Job Record on this page is used to illustrate the other two tabs within each subsection.

Click the **Work Location** object.
12. The Work Location tab provides information related to the department the employee has been assigned to.

**Empl Record** (Employee Record Number) Field [1]
A system generated number used to identify concurrent jobs (multiple appointments) for an employee.

**Position Number** Field [2]
Unique number used to identify a position on campus.

**Company** Field [3]
Always set to UOA = University of Alberta

**Dept ID** (Department ID) [4]
Provides the Department ID the employee’s job belongs to.

**Department** Field [5]
Provides the description of the Department ID

**Location Number** Filed [6]
Provides the system code linked to the department location.

**Location Description** [7]
Provides the description of the location of the employee’s department.

13. In the example provided, the last job record is indicates that the employee belongs to department 100300 which is the General ALES AFNS department located in the Agriculture Forestry building.

14. Click the **Job Information** object.
15. The Job Information tab provides information related to the Job the employee is assigned to.

**Empl Record** (Employee Record Number) Field [1]
A system generated number used to identify concurrent jobs (multiple appointments) for an employee.

**Business Unit** Field [2]
Always set to UOFAB = University of Alberta.

**Job Code** Field [3]
Identifies the job classification group that the job belongs to.

**Job Title** Field [4]
Provides a description of the job code associated with the employee.

**Empl Class** (Employee Class) Field [5]
Provides the category code that the employee has been assigned to.

**Full/Part Time** Field [6]
Identifies if the employee has been hired as full time or part time employment.

**Union Code** Field [7]
Identifies the association with which the employee is affiliated

**Bargaining Unit** Field [8]
Identifies the association with which the employee is affiliated
16. To view all the columns described under each tab at once, Click the Show all columns button.

17. Once you are done viewing the employee's job information you can return to the main search area.

Click the Return to Search button.

18. You can continue to search for another employee's job information by clearing the existing search criteria fields and entering the employee's information into the fields provided.

NOTE: You can only view one employee at a time.

19. Congratulations! You have completed the training on how to use the General Inquiry Job query.

End of Procedure.

Understanding the Academic Increment Page

In this topic you will learn how to navigate to the increment page and interpret the information provided within the page.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.
Procedure

Navigation Path: Main Menu > Workforce Administration > Salaries* > Use > Employee Increment*

1. Your Home Page may vary depending on your PeopleSoft security.
2. Click the Main Menu button.
3. Click the Workforce Administration menu.
4. Click the Salaries* menu.
5. Click the Use menu.
6. Click the Employee Increment* menu.
7. In the Employee Increment page, there are several ways to search for an employee's increment information.
   To view a list of valid search types, Click the button to the right of the Search by field.
8. You can search by Employee ID, Employee Record, Last Name, First Name, etc.

9. For example purposes, Click the Emp ID list item.

10. After selecting the search type enter the corresponding information.
    For example purposes, Enter Employee ID "1000001" into the begins with field.

11. Click the Search button.

12. If more than one Employee Record is returned, select the appropriate Employee Record in correlation to the job in which the employee is receiving his or her increment.

    If you require a report for all employees within a Pool Group, a separate topic has been created for training purposes.

    For example purposes, in the row containing Emp Record '0' Click the 1000001 link.
13. The **Employee Increment** page for the selected employee will appear.

   This page provides information related to the last increment given to the employee, as well as any promotions or special salary adjustments the employee has been given.

   This page is used for **review and information only**.

14. Use the **View All** option or scroll through the pages using the arrows in the top right corner of the panel to view all information.

15. Use the **Include History** button to display all increment history.

16. The **Pool Group** and **Evaluation Committee Code** information is displayed on the Employee Increment page. These fields cannot be overridden on this page.

17. When hiring or rehiring an employee, the **Evaluation Committee Code** is entered on the Job Junior page of the Job Data record.
18. The **Pool Group** the employee belongs to is tied to the department they are hired for. The Department Table holds the Pool Group information.

   If the employee belongs to a different Pool Group than what the department is tied to, the new Pool Group is entered in the **Pool Group Override** field on the Job Junior page.

   If you require a report for all employees within a Pool Group, refer to the 'Reporting Academic Increment and Promotion' topic for further details.

19. If you see an error or omission, contact an Employment Specialist or Employment Advisor to make any corrections.

20. The Employee Increment page is an effective dated page. This means all of the information provided on the page is effective as of the date in the **Effective Date** field.

21. In this example on July 1, 2007, this academic staff member received a **Promotion** to Professor 1 in addition to receiving a 1.50 **Merit Increment**.

   Note the change to the Job Code. The Action on the Job Data record is **Data Change (Data Chg)** and the Reason Code is Promotion (PRO).
22. Some Faculty members receive a Market Supplement at the time of hire. When this employee promotes to a Professor, in some cases, the market supplement is subsequently rolled into their base salary.

When this happens:
- **Special Adjustment** field is populated with the amount.
- Action field = **Pay Rt Chg**
- Reason field = **SAJ** (Special Adjustment)

23. Congratulations! You have completed the training on Understanding the Academic Increment Page.

**End of Procedure.**