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UNIVERSITY OF ALBERTA

**PeopleSoft HCM**

# Manager Dashboard

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Prepared by: HR Operations

Created on 7/10/2017 3:54:00 PM

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# Manager Dashboard

## Overview

This section will provide an understanding of the Manager Dashboard and the features it provides for Managers and Supervisors to assist in their daily responsibilities.

## Objectives

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

- The Manager Dashboard
- How to Navigate the Areas within Manager Dashboard

## Related Reference Material

All related reference material is stored on the Learning Reference Materials (<http://www.hrs.ualberta.ca/Learning/LearningPeopleSoft/LearningSupportMaterials>) web page within the Human Resource Services website.

Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.

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## Understanding the Manager Dashboard

The **Manager Dashboard** consists of a set of 7 pagelets to allow managers to view Human Resources and talent information pertaining to their staff. The tools found within these pagelets have been created to be incorporated into your daily work. Best business practice is to view your dashboard on a regular basis.

The Manager Dashboard is updated nightly to ensure the information provided is current.

This dashboard contains the following pagelets.

- Direct Line Report
- Dashboard T&L Disclaimer
- Alerts
- My Reports
- Pending Approvals
- Quick Links
- External Links


## Navigating the Manager Dashboard

In this topic you will learn how to navigate the Manager Dashboard and the pagelets that make up the dashboard. You will have access to this dashboard only if you have direct reports.



**To Begin the Online Tutorial:**



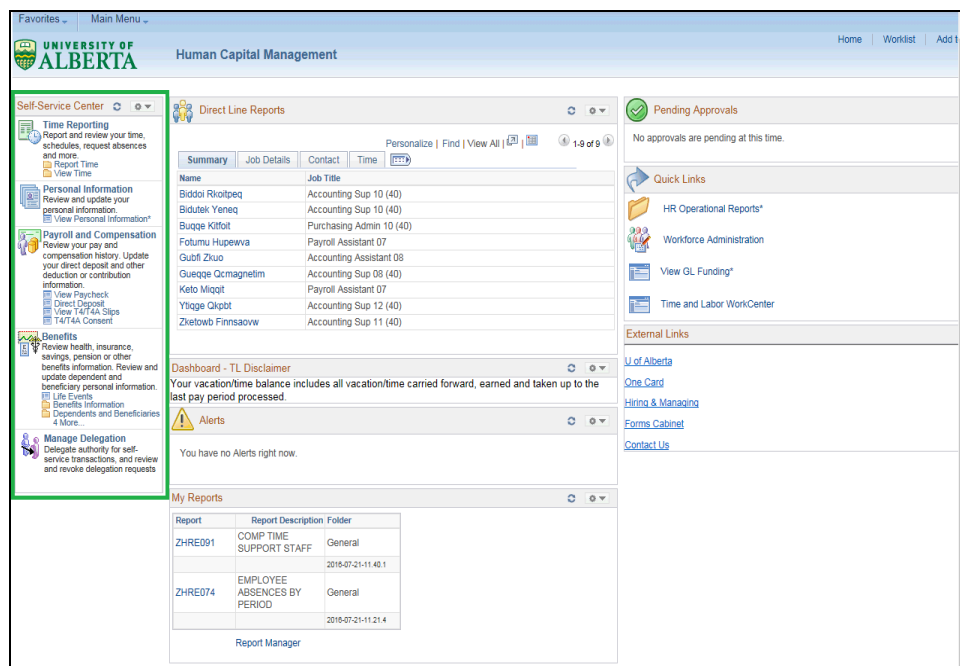
- Click the  button located in the top left of the screen and follow the instructions provided.

### Procedure

Navigation Path: [Log on to PeopleSoft HCM](#)

1. Your Home Page defaults to 2 separate sections:

- Self-Service Center
- Manager Dashboard



**Direct Line Reports**

Name	Job Title
Biddoi Rihoitpeq	Accounting Sup 10 (40)
Biduiek Yeneq	Accounting Sup 10 (40)
Buqqa Kiffot	Purchasing Admin 10 (40)
Folumu Hupeewa	Payroll Assistant 07
Gutfoi Ziwoo	Accounting Assistant 08
Gueqqa Qcmagnetim	Accounting Sup 08 (40)
Keto Miroqit	Payroll Assistant 07
Yyogqa Qkqpt	Accounting Sup 12 (40)
Zxelwoib Finnsaoww	Accounting Sup 11 (40)

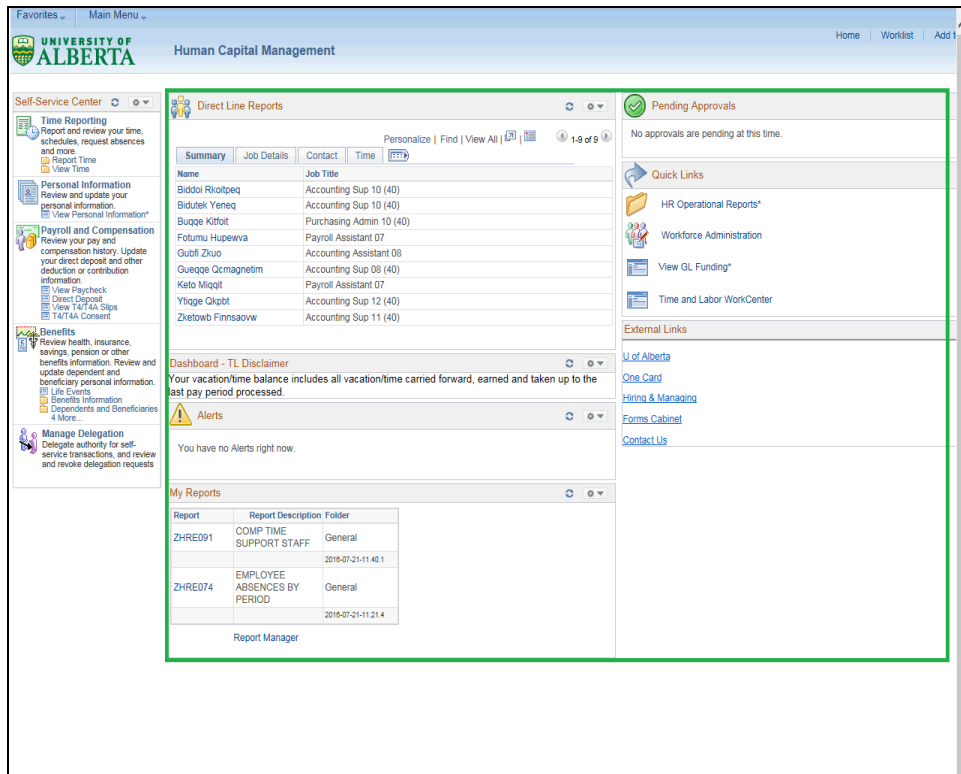
**My Reports**

Report	Report Description	Folder
ZHRE091	COMP TIME SUPPORT STAFF	General
		2016-07-21-11:40:1
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
		2016-07-21-11:21:4

- The **Self-Service Center** is a navigation collection of pages for employee information.

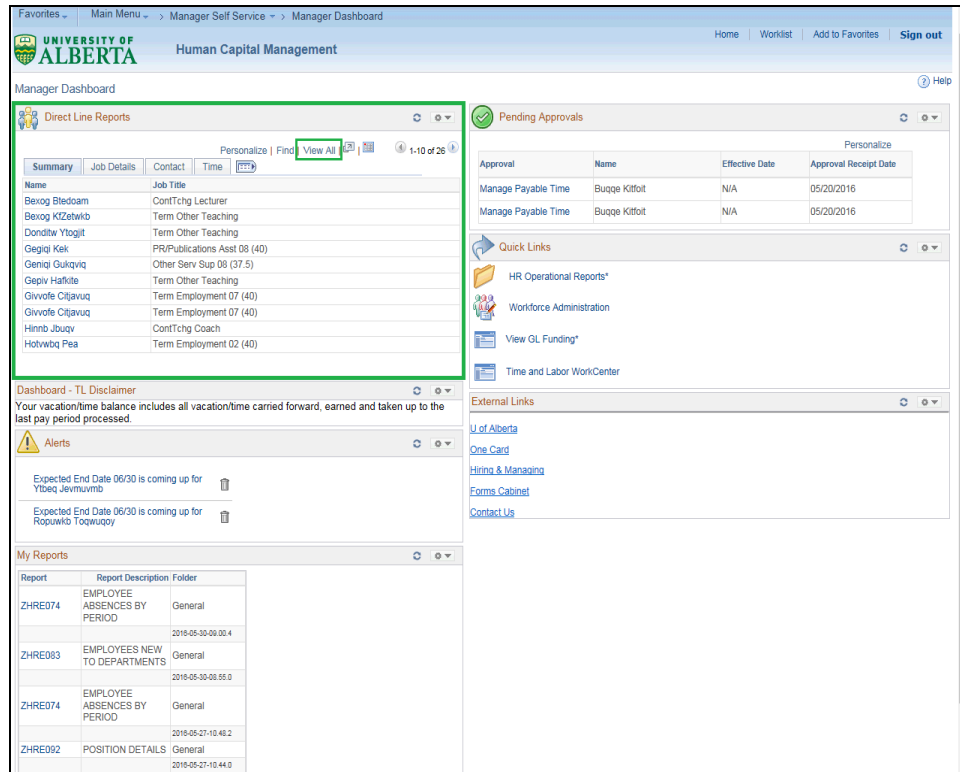
These links are used as a quick and easy way to open commonly used PeopleSoft pages related to Employee Self Service functionality.

The option you see in the navigation collection may vary, depending on the type of employee you are and your PeopleSoft HCM security.



- The Manager Dashboard will display only if you have Direct Reports.
- The **Manager Dashboard** is designed to be a one stop shop for all Supervisors and is intended to be incorporated into your daily work.
- This particular dashboard is made up of 7 pagelets.

The following information will describe the function of each of these pagelets.



The screenshot shows the 'Manager Dashboard' for Human Capital Management. The 'Direct Line Reports' section is highlighted with a green border and contains a table of employees reporting directly to the supervisor. The 'View All' link is highlighted in a green box.

Summary	Job Details	Contact	Time
Name	Job Title		
Bavoy Bledsam	Contfchg Lecturer		
Bavoy KZetawb	Term Other Teaching		
Donatw Ylogit	Term Other Teaching		
Gegrej Kek	PIR/Publications Asst 08 (40)		
Genel Gulqiyq	Other Serv Sup 08 (37.5)		
Geply Hafkta	Term Other Teaching		
Givwofe Cijavuq	Term Employment 07 (40)		
Givwofe Cijavuq	Term Employment 07 (40)		
Himb Jauqy	Contfchg Coach		
Hotwobq Pea	Term Employment 02 (40)		

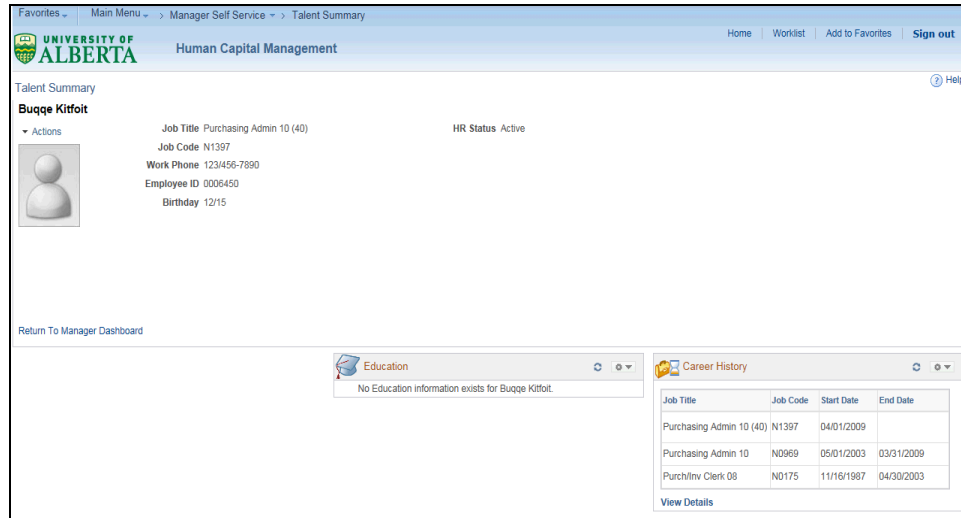
## 6. Direct Line Reports

This area displays the employee(s) reporting directly to the Supervisor. A Person of Interest (POI) will not be displayed on this pagelet.

To see the complete list, you can click the **View All** option.

- The Direct Line Reports area contains links for viewing Talent Summary information. This information includes Employee ID, Job Title, Contact Information, Education and Career History.

For example purposes, Click the **Employee Name**.



**Talent Summary**

**Buqge Kitfoit**

Job Title Purchasing Admin 10 (40) HR Status Active

Job Code N1397

Work Phone 123456-7890

Employee ID 0006450

Birthday 12/15

Return To Manager Dashboard

**Education**

No Education information exists for Buqge Kitfoit.

**Career History**

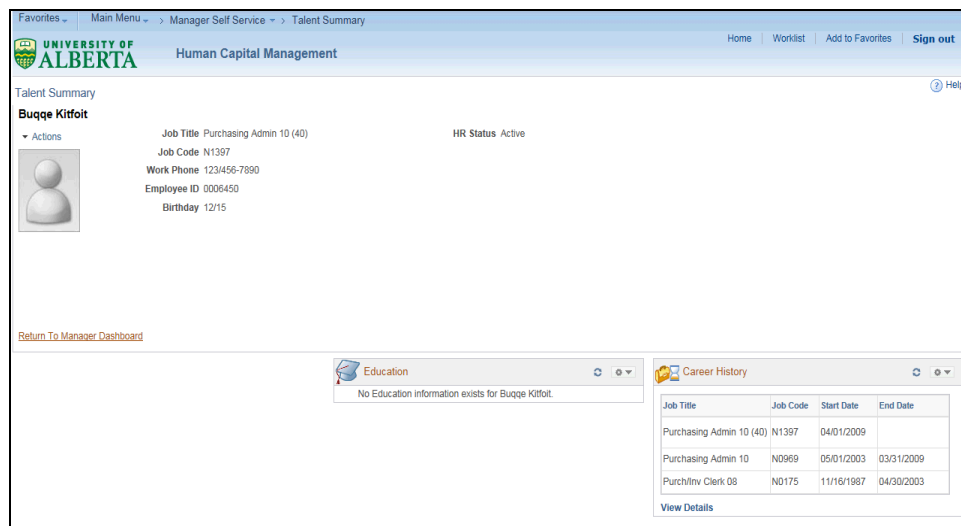
Job Title	Job Code	Start Date	End Date
Purchasing Admin 10 (40)	N1397	04/01/2009	
Purchasing Admin 10	N0969	05/01/2003	03/31/2009
Purch/Inv Clerk 08	N0175	11/16/1987	04/30/2003

[View Details](#)

## 8. Talent Summary Page

This page displays the Career History pertaining to your direct report.

Education details are displayed for Academic employees only.



**Talent Summary**

**Buqge Kitfoit**

Job Title Purchasing Admin 10 (40) HR Status Active

Job Code N1397

Work Phone 123456-7890

Employee ID 0006450

Birthday 12/15

Return To Manager Dashboard

**Education**

No Education information exists for Buqge Kitfoit.

**Career History**

Job Title	Job Code	Start Date	End Date
Purchasing Admin 10 (40)	N1397	04/01/2009	
Purchasing Admin 10	N0969	05/01/2003	03/31/2009
Purch/Inv Clerk 08	N0175	11/16/1987	04/30/2003

[View Details](#)

9. Click the **Return To Manager Dashboard** link.

[Return To Manager Dashboard](#)

## 10. Troubleshooting Tip

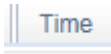
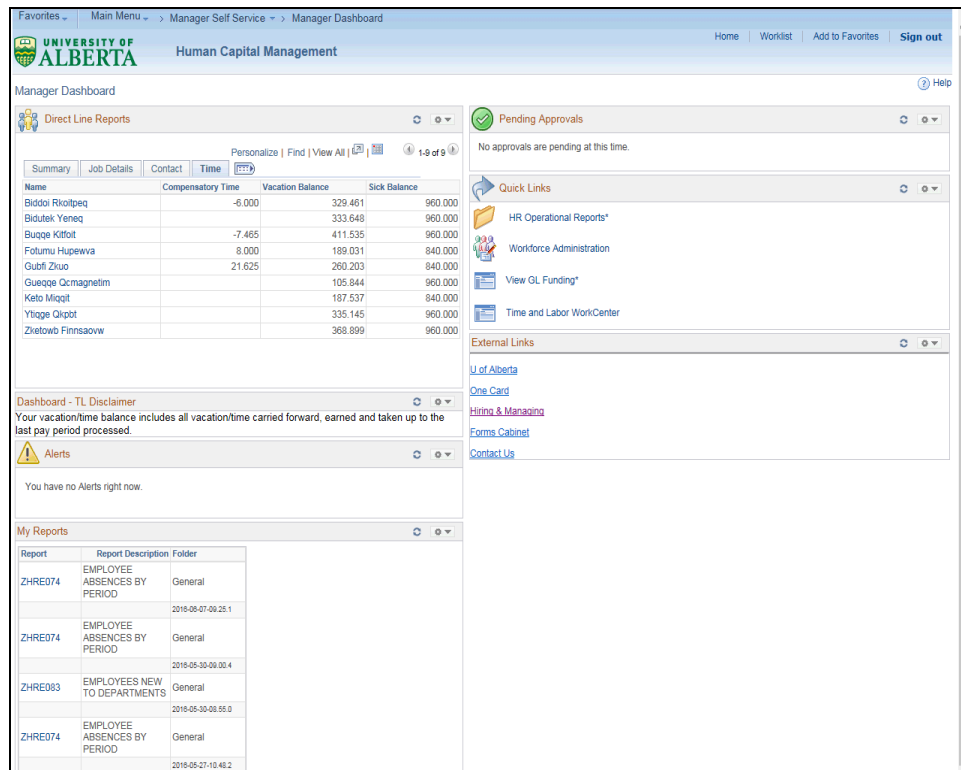
If a direct report is not shown in your list, the employee may not have the 'Reports To' or 'Supervisor ID' field populated on their employee record in PeopleSoft.

Bring this to the attention of your HR Contact in your Department.



11. Each of the tabs shown provides different information related to the direct reports listed.

For example, Click the **Time** tab.

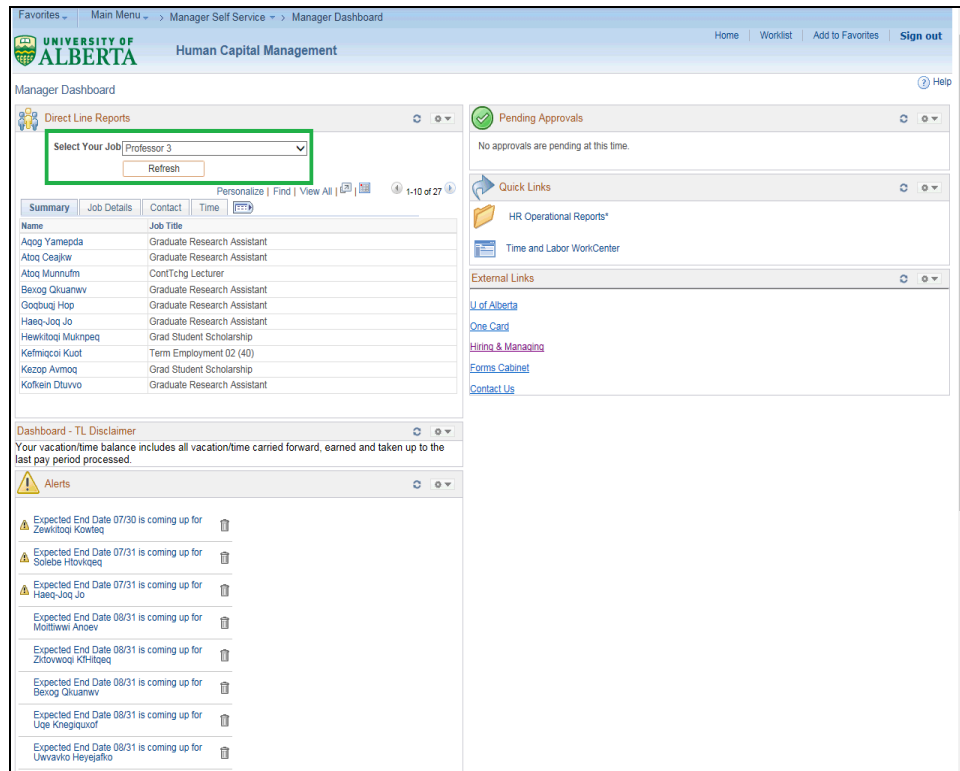



The screenshot shows the 'Manager Dashboard' for 'Human Capital Management'. The 'Direct Line Reports' section is active, and the 'Time' tab is selected. The table displays the following data:

Name	Compensatory Time	Vacation Balance	Sick Balance
Biddoi Rkoltpaq	-6,000	329,461	960,000
Bidutek Yeneq		333,648	960,000
Buqqa Kiflot	-7,465	411,535	960,000
Fotumu Hupeewa	8,000	189,031	840,000
Qubfi Ziuo	21,625	260,203	840,000
Gueqqa Ocmagnetim		105,844	960,000
Keto Miquit		187,537	840,000
Yiqqqa Oiqqit		335,145	960,000
Zretowb Finnsaoww		368,899	960,000

Other sections visible include 'Pending Approvals' (No approvals pending), 'Quick Links' (HR Operational Reports, Workforce Administration, View GL Funding, Time and Labor WorkCenter), 'External Links' (U of Alberta, One Card, Hiring & Managing, Forms Cabinet, Contact Us), 'Dashboard - TL Disclaimer' (Your vacation/time balance includes all vacation/time carried forward, earned and taken up to the last pay period processed), 'Alerts' (You have no Alerts right now), and 'My Reports' (List of reports such as EMPLOYEE ABSENCES BY PERIOD).

12. This Time tab shows the Compensatory, Vacation and General Illness balances for your direct reports.



Manager Dashboard

**Direct Line Reports**

Select Your Job: Professor 3

Refresh

Name	Job Title
Aqog Yamepda	Graduate Research Assistant
Atoq Ceajkw	Graduate Research Assistant
Atoq Munnufm	ContTchg Lecturer
Bexog Okuanwv	Graduate Research Assistant
Goqbuq Hop	Graduate Research Assistant
Haeq-Joq Jo	Graduate Research Assistant
Hewitloq Mukneq	Grad Student Scholarship
Kefmicoi Kuot	Term Employment 02 (40)
Kezop Avmoq	Grad Student Scholarship
Kofkein Dluvo	Graduate Research Assistant

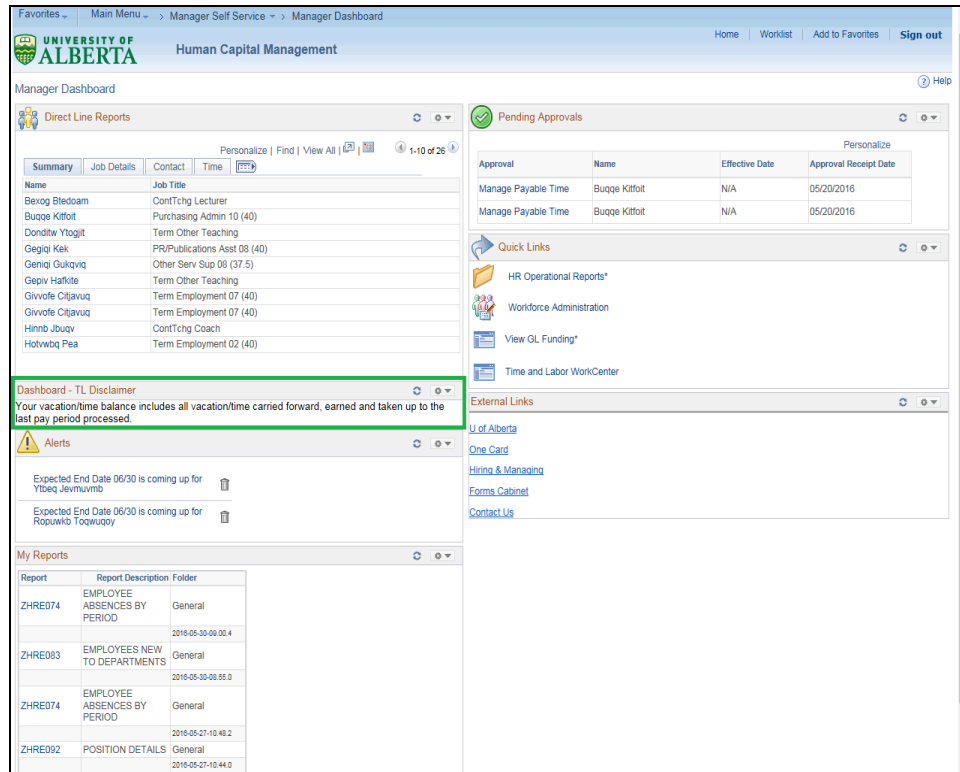
**Alerts**

- Expected End Date 07/30 is coming up for Zewkitoq Kowteq
- Expected End Date 07/31 is coming up for Solebe Hlovkqeq
- Expected End Date 07/31 is coming up for Haeq-Joq Jo
- Expected End Date 08/31 is coming up for Molltwi Anoev
- Expected End Date 08/31 is coming up for Zitowwoq KHiltqeq
- Expected End Date 08/31 is coming up for Bexog Okuanwv
- Expected End Date 08/31 is coming up for Uqe Kneqiquoxof
- Expected End Date 08/31 is coming up for Uwawiko Hejejaiko

13. If you are responsible for multiple jobs, you will see the 'Select Your Job' option.

All employees reporting to the Job selected will appear on the summary page. However, a Person of Interest (POI) will not be listed.

To view the employees for a different job click on the drop down arrow, select the Job and then click **'Refresh'**.



The screenshot shows the 'Manager Dashboard' interface for Human Capital Management. It includes sections for 'Direct Line Reports', 'Pending Approvals', 'Alerts', and 'My Reports'. A green box highlights a disclaimer in the 'Direct Line Reports' section.

**Direct Line Reports**

Name	Job Title
Bauqg Bledsam	Cont'ctng Lecturer
Buqge Kitfoit	Purchasing Admin 10 (40)
Donatlw Yhogit	Term Other Teaching
Gagjqi Kek	PR/Publications Asst 08 (40)
Genal Guikqviq	Other Serv Sup 08 (37.5)
Gagply Hafkita	Term Other Teaching
Givwofe Cijavuq	Term Employment 07 (40)
Givwofe Cijavuq	Term Employment 07 (40)
Himib Jauqy	Cont'ctng Coach
Hotwibq Pea	Term Employment 02 (40)

**Dashboard - TL Disclaimer**  
Your vacation/time balance includes all vacation/time carried forward, earned and taken up to the last pay period processed.

**Alerts**

- Expected End Date 06/30 is coming up for Ybeq Jevmuvmb
- Expected End Date 06/30 is coming up for Popwko Toqwuqoy

**My Reports**

Report	Report Description	Folder
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
ZHRE083	EMPLOYEES NEW TO DEPARTMENTS	General
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
ZHRE092	POSITION DETAILS	General

#### 14. Dashboard TL Disclaimer

This pagelet shows a disclaimer pertaining to your Direct Report's Time and Labor balances.

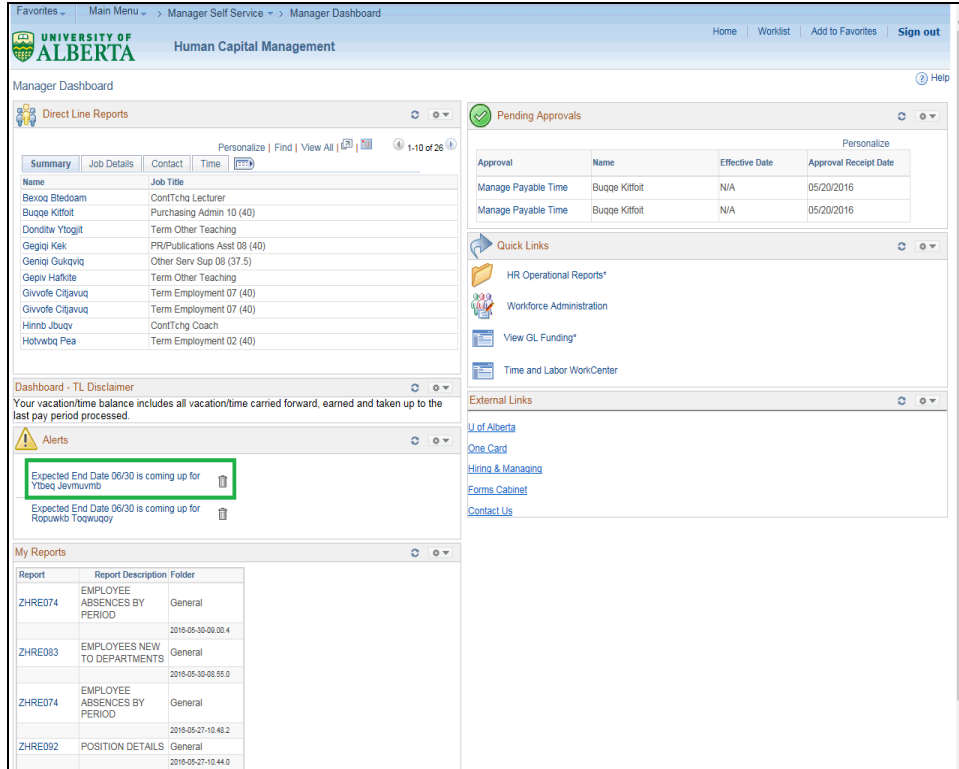
The balances shown on the Time tab are as of the most recent pay period when the vacation was taken.

To view all vacation hours submitted, navigate to the timesheet for the individual employee.

#### 15. Alerts

The alerts you will see in this area include:

- Job Expected End Date and
- Leave of Absence Expected Return Date



**Alerts**

- Expected End Date 06/30 is coming up for Ybseq Jevhtwmb
- Expected End Date 06/30 is coming up for Ropwtk: Topruppy

16. **Job Expected End Date:**

This Alert will indicate each **temporary employee** who has an Expected Job End Date approaching.

The alert is generated 3 months in advance of the end date, giving you time to take further action if required. The Supervisor will receive a total of 3 alerts at 90, 60 and 30 day intervals, until the employee record is updated.

You can click on the garbage can icon to delete the alert when no further action is required from you.

**\* If nothing is done, the employee will automatically be terminated in the system.**

17. **Note:** If there is a contract extension (action/reason EXT) on the same date as the prior row with a higher effective sequence, **an alert will not be generated.**

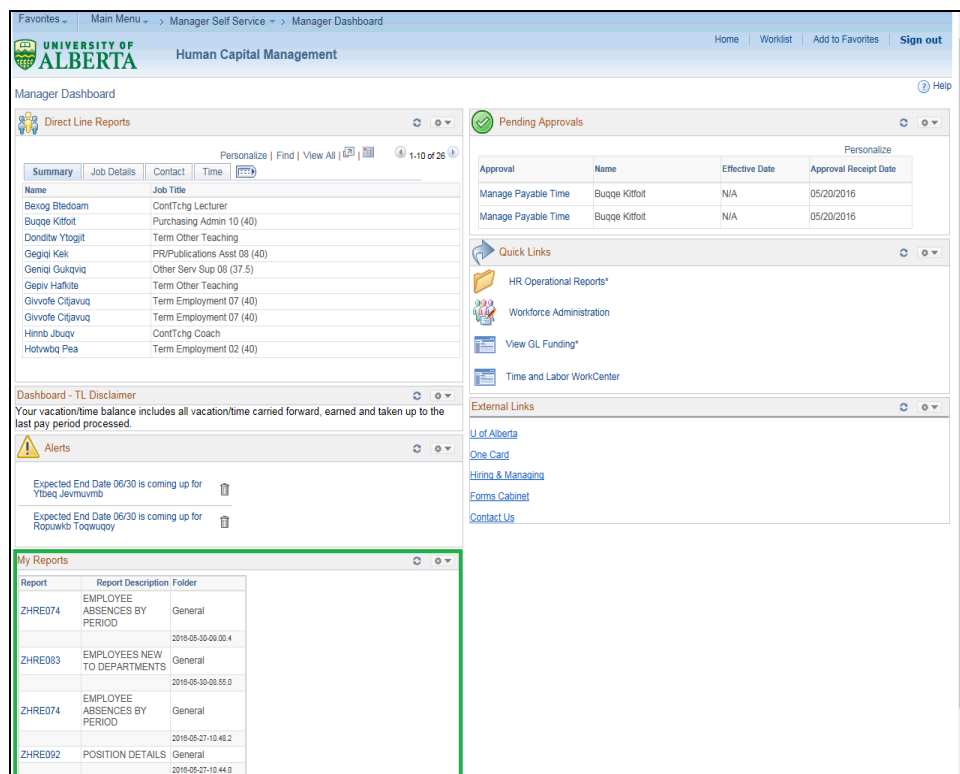
### 18. Leave of Absence Expected Return Date:

This alert is generated when a member of the **Support Staff**, that reports to you, has an Expected Return Date approaching.

The alert is generated 3 months in advance of the end date, giving you time to take further action if required. The Supervisor will receive a total of 3 alerts at 90, 60 and 30 day intervals, until the employee record is updated.

This Alert is not generated for an Administrative or Sabbatical Leave.

**\* If nothing is done, the employee will remain on leave and unpaid in the system.**



Report	Report Description	Folder
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
ZHRE083	EMPLOYEES NEW TO DEPARTMENTS	General
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
ZHRE092	POSITION DETAILS	General

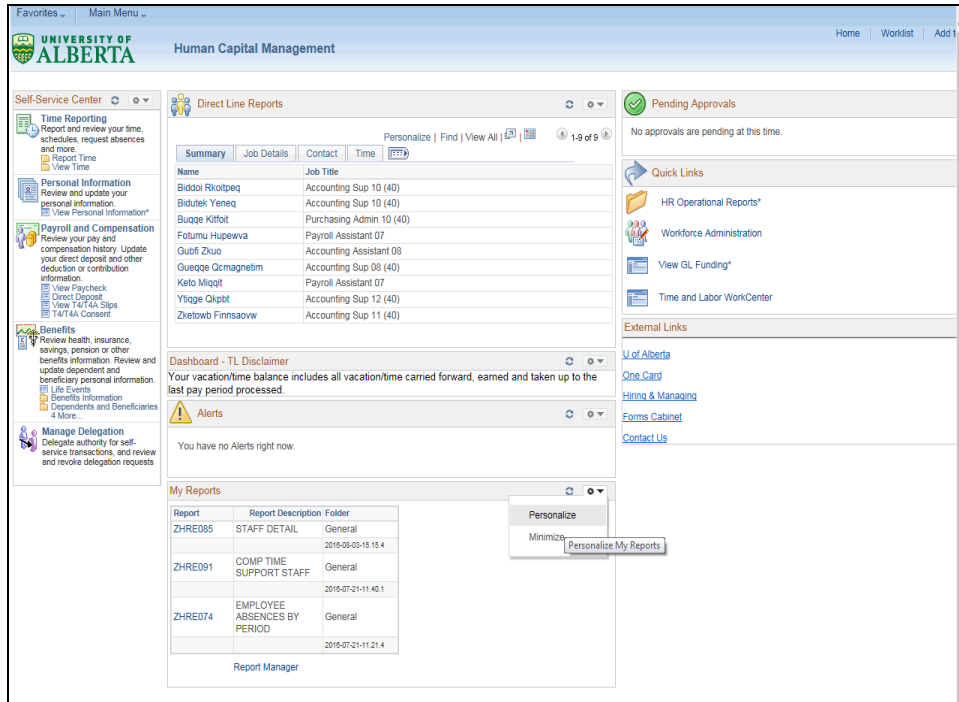
### 19. My Reports

This area provides a list of the last 5 reports you have run and on what date.

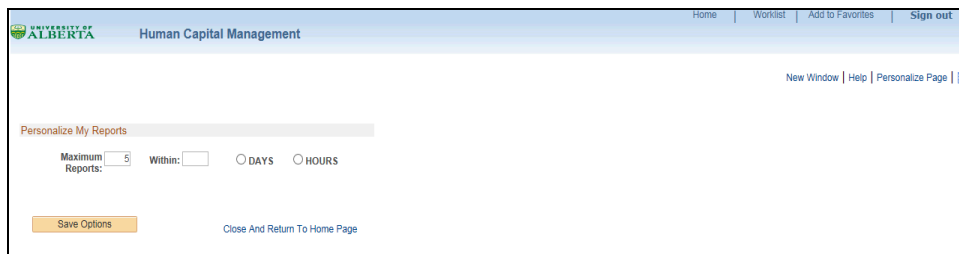
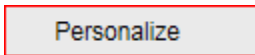
### 20. The default settings for this pagelet are set to display only 5 reports.

Click the **Pagelet Settings** button.



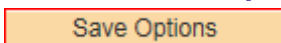


21. Click the **Personalize** link.

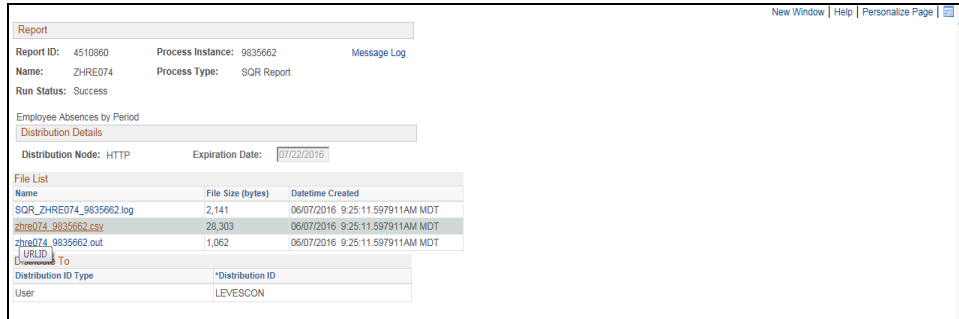


22. **DO NOT** change these settings.

Click the **Save Options** button.



23. To retrieve a report listed Click the **Report ID** link.



24. Depending on the Run Control set-up for each report the type of report that is returned will change.

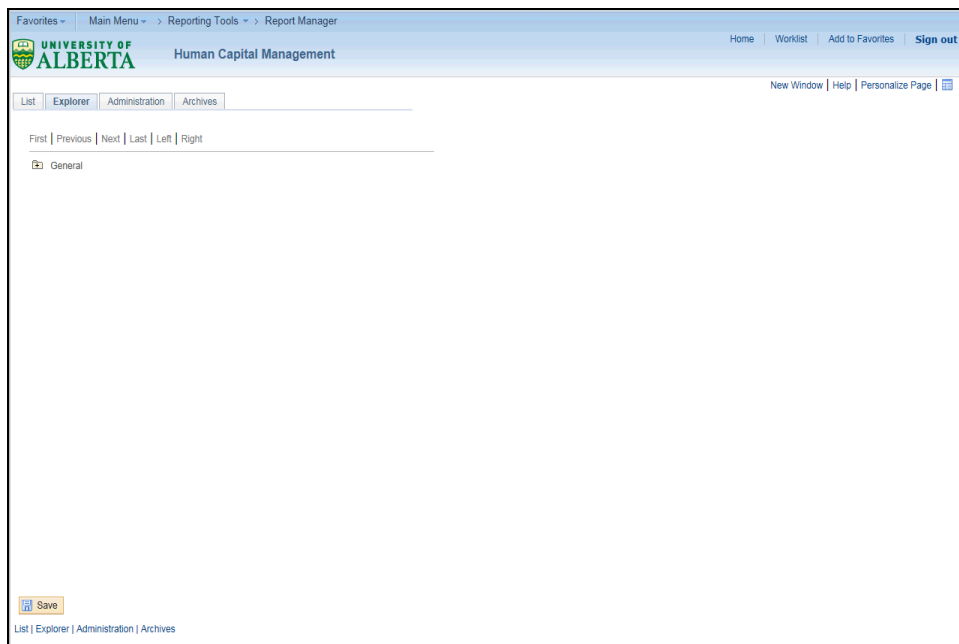
For example the ZHRE074 Report is set to return a CSV formatted report.

25. At the bottom of the **My Reports** pagelet is a direct link to your **Report Manager**.

This link will take you to a list of reports you have run.

Click the **Report Manager** link.

[Report Manager](#)



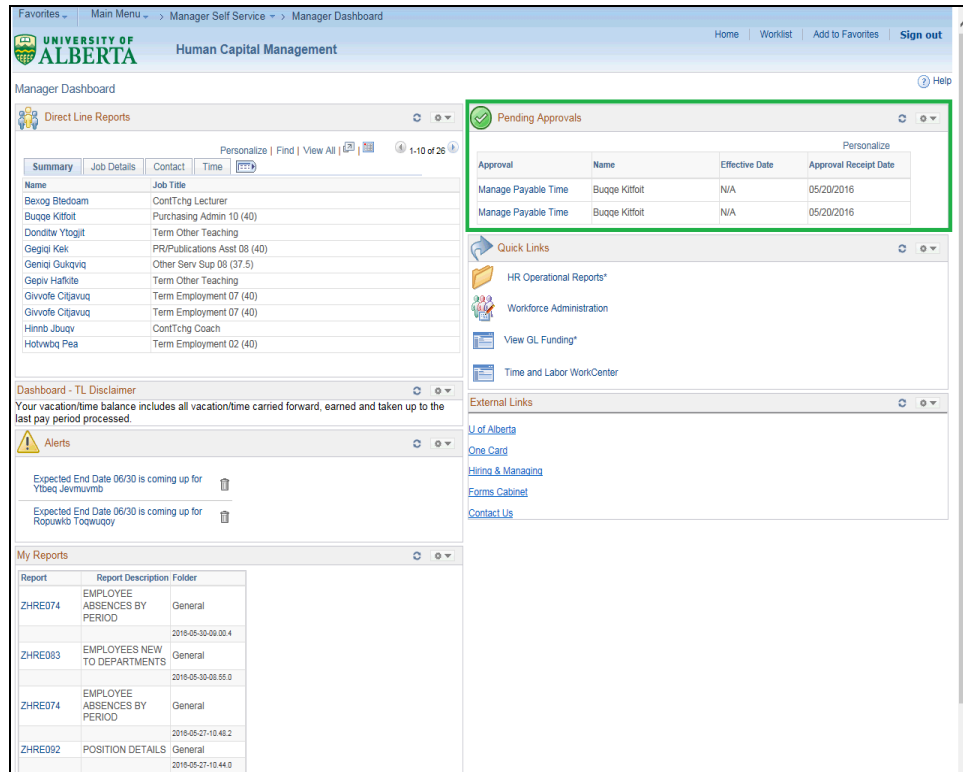
26. In the Report Manager page under the Explorer tab, Click the **Folder Icon** object.



27. A complete list of reports that you have run in the past 60 days will be displayed.

When you click on a report listed, a new window will open in the format requested on the RUN CONTROL ID.

To close the page and navigate to another folder, Click the **Save** button.

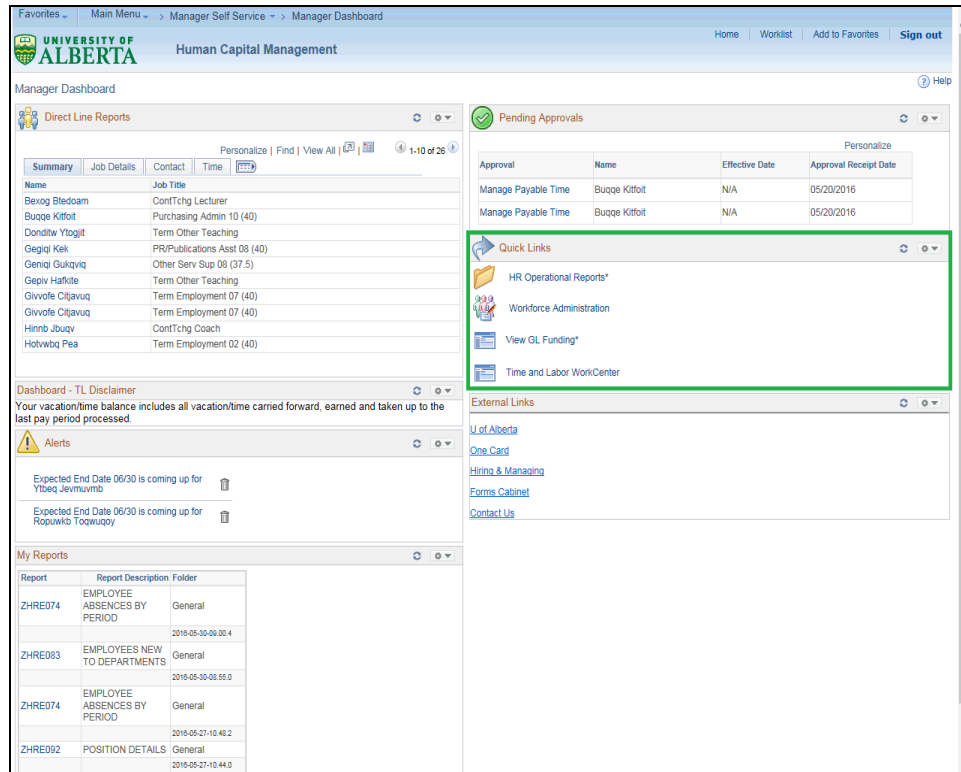
Approval	Name	Effective Date	Approval Receipt Date
Manage Payable Time	Buqqe Kitfoit	N/A	05/20/2016
Manage Payable Time	Buqqe Kitfoit	N/A	05/20/2016

**28. Pending Approvals**

This area contains Time and Labor payable time as well as new or revised eForms waiting your approval.

It is recommended that you navigate to the Time and Labor WorkCenter on the Quick Links Pagelet to approve the payable hours listed.





**Direct Line Reports**

Name	Job Title
Bavdy Bledsam	Cont'chg Lecturer
Buqpe Kitfoit	Purchasing Admin 10 (40)
Donalhw Yhogjit	Term Other Teaching
Gagryj Kek	PR/Publications Asst 08 (40)
Genel Gukqyiq	Other Serv Sup 08 (37.5)
Gaphy Hafkita	Term Other Teaching
Givwofe Cijavuq	Term Employment 07 (40)
Givwofe Cijavuq	Term Employment 07 (40)
Himib Juvqy	Cont'chg Coach
Hotwibq Pea	Term Employment 02 (40)

**Pending Approvals**

Approval	Name	Effective Date	Approval Receipt Date
Manage Payable Time	Buqpe Kitfoit	N/A	05/20/2016
Manage Payable Time	Buqpe Kitfoit	N/A	05/20/2016

**Quick Links**

- HR Operational Reports\*
- Workforce Administration
- View GL Funding\*
- Time and Labor WorkCenter

**External Links**

- U of Alberta
- One Card
- Hiring & Managing
- Forms Cabinet
- Contact Us

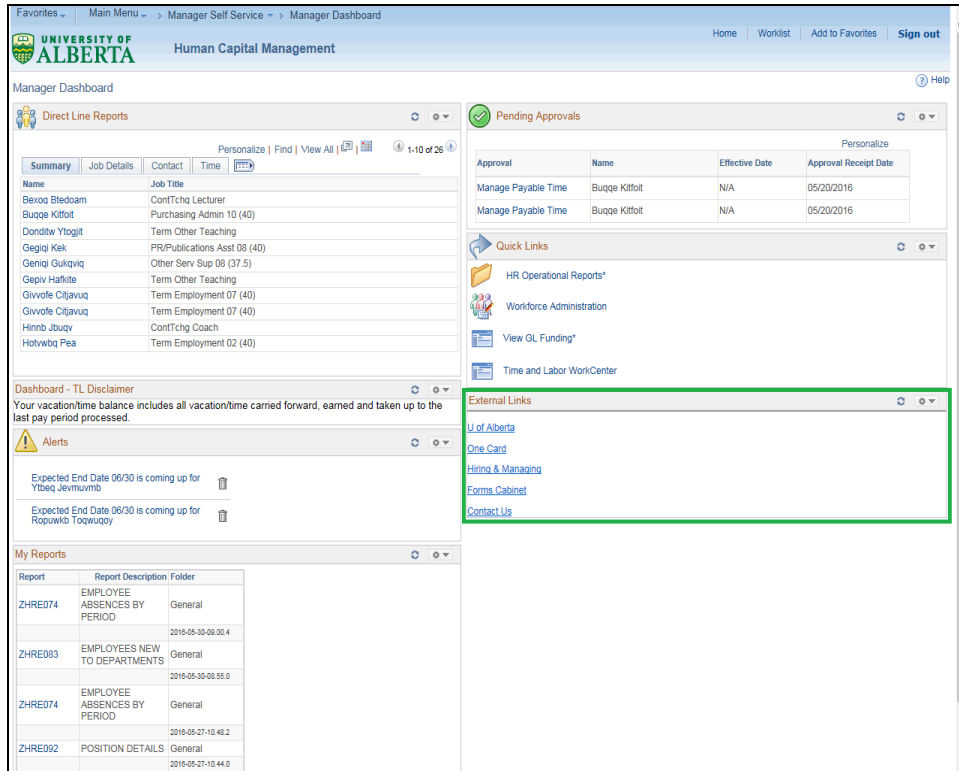
**My Reports**

Report	Report Description	Folder
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
		2016-05-30-09:30.4
ZHRE083	EMPLOYEES NEW TO DEPARTMENTS	General
		2016-05-30-09:55.0
ZHRE074	EMPLOYEE ABSENCES BY PERIOD	General
		2016-05-27-10:43.2
ZHRE092	POSITION DETAILS	General
		2016-05-27-10:44.9

## 29. Quick Links

This area contains additional links to commonly used pages within PeopleSoft. The links displayed will be based on your PeopleSoft security access.

The most valuable links for you are the **View GL Funding\*** and **Time and Labor WorkCenter** which are addressed in detail under their own topics.



### 30. External Links

This area is created to accommodate external web sites outside of PeopleSoft.

For example, the U of A Home Page.

### 31. Congratulations! You have completed the training on how to Navigate the Manager Dashboard.

**End of Procedure.**