UNIVERSITY OF ALBERTA

PeopleSoft HCM

Manager Dashboard

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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.

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.

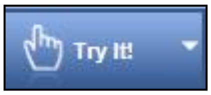
This dashboard contains the following pagelets.

- 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 

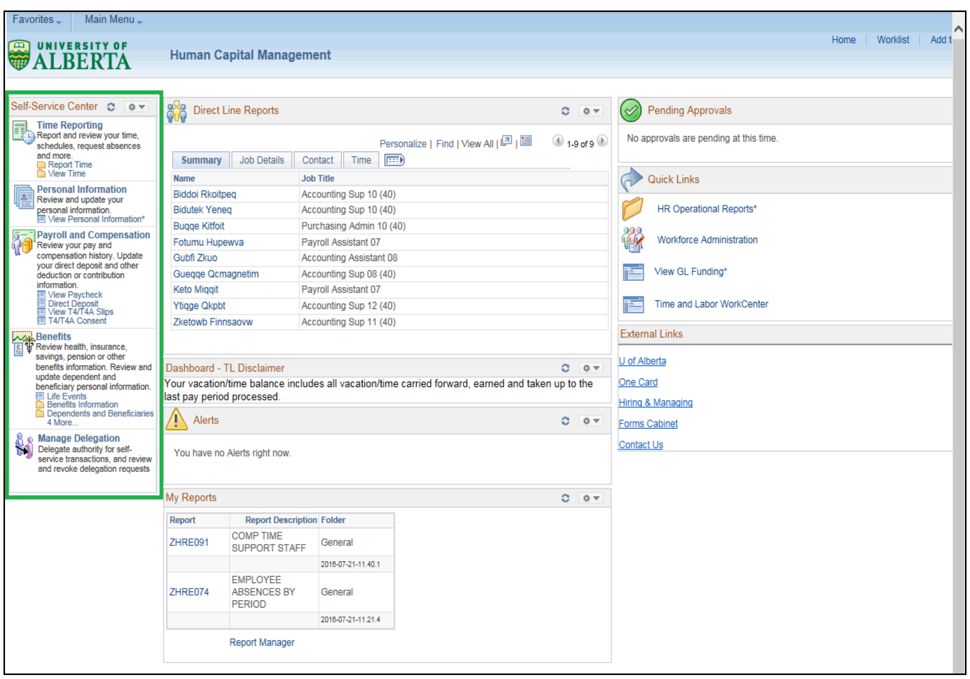
button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: **Log on to PeopleSoft HCM**

1. Your Home Page defaults to 2 separate sections:

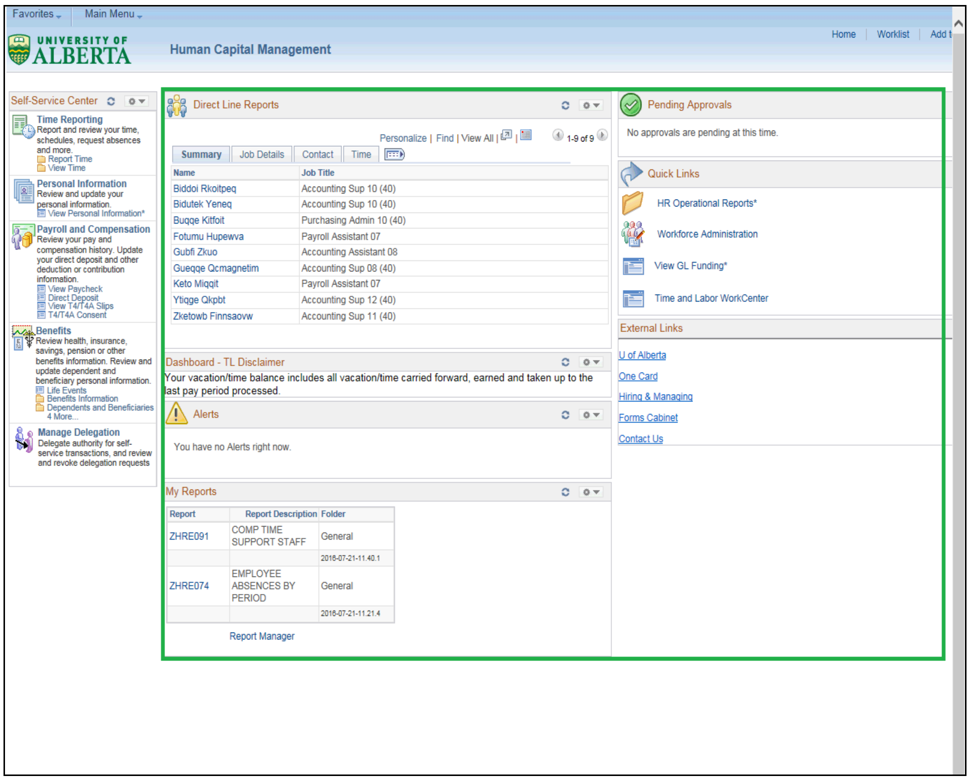
   • Self-Service Center
   • Manager Dashboard



2. 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.

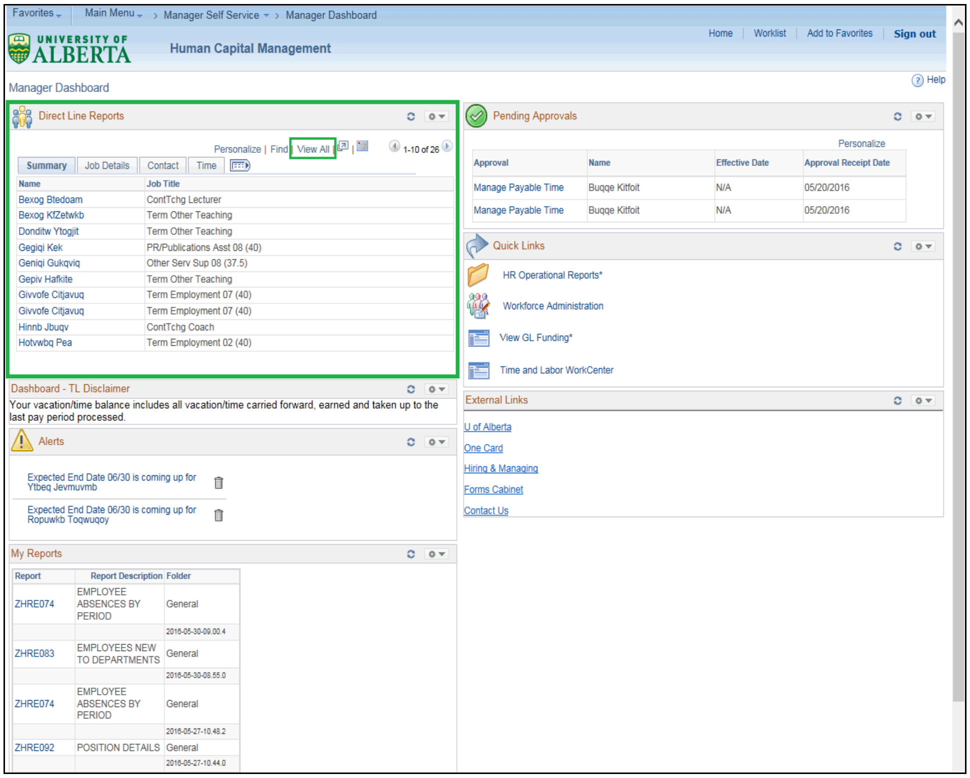


3. The Manager Dashboard will display only if you have <u>Direct Reports</u>**.**

4. The **Manager Dashboard** is designed to be a one stop shop for all Supervisors and is intended to be incorporated into your daily work.

5. This particular dashboard is made up of 7 pagelets.

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



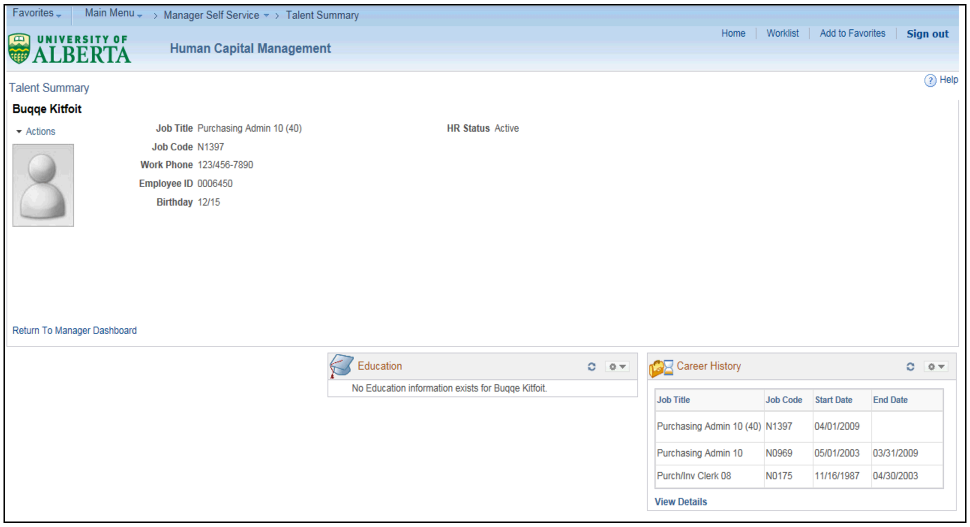
6. **Direct Line Reports**

   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.

7. 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.

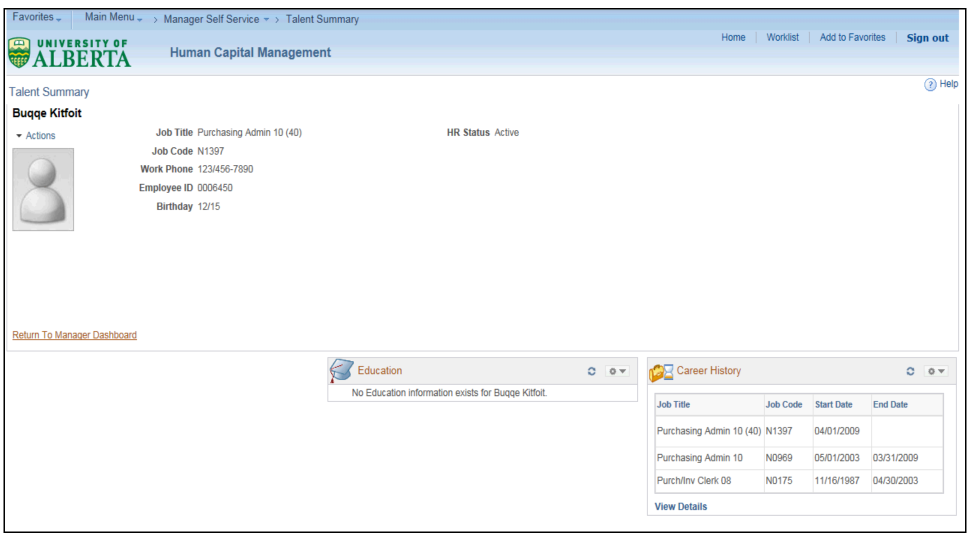
   For example purposes, Click the **Employee Name**.



8. **Talent Summary Page**

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

Education details are displayed for Academic employees only.



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

Return To Manager Dashboard

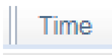
10. **Troubleshooting Tip**

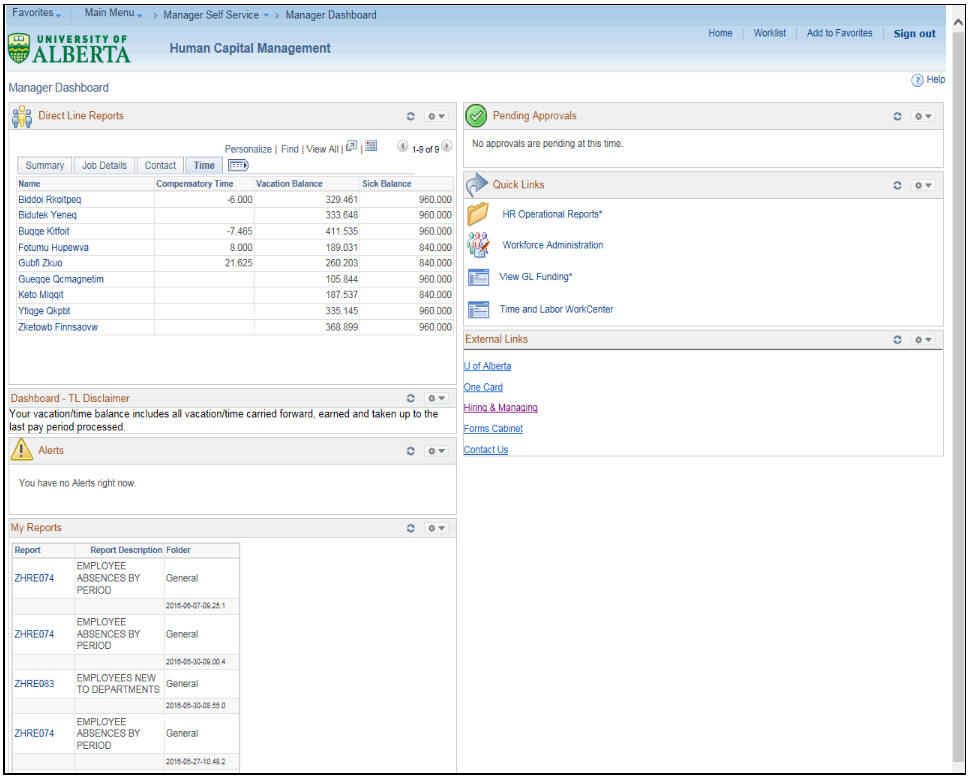
If a direct report is not shown in your list, the employee may not have the 'Reports To' or 'Supervisor ID' field populated on their employee record in PeopleSoft.

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

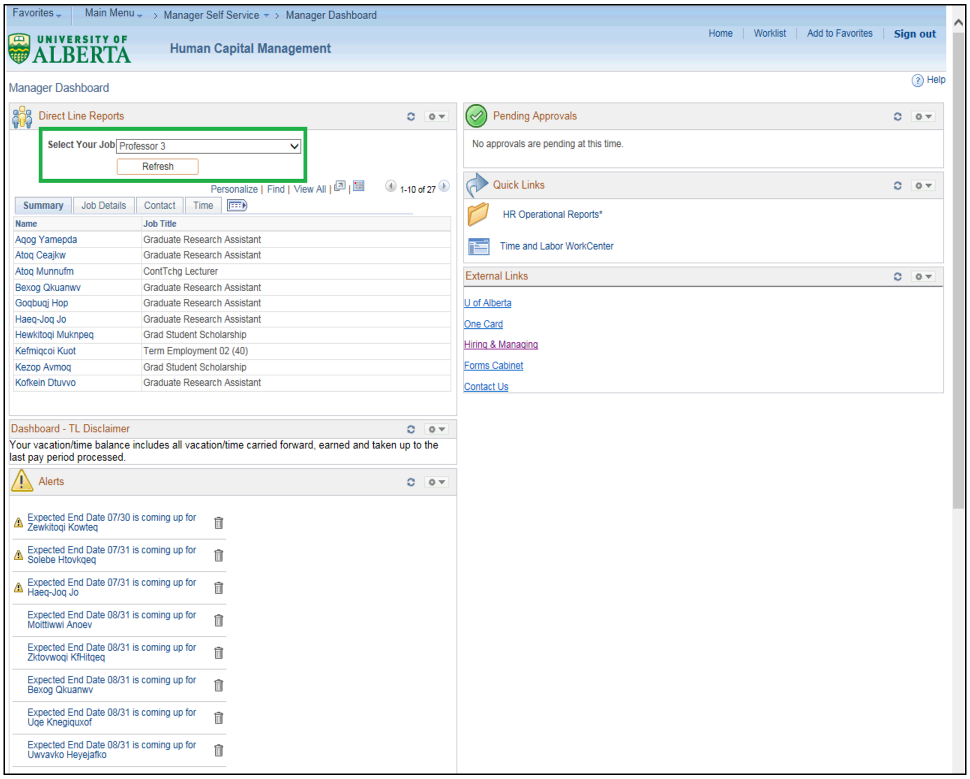
11. Each of the tabs shown provides different information related to the direct reports listed.

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





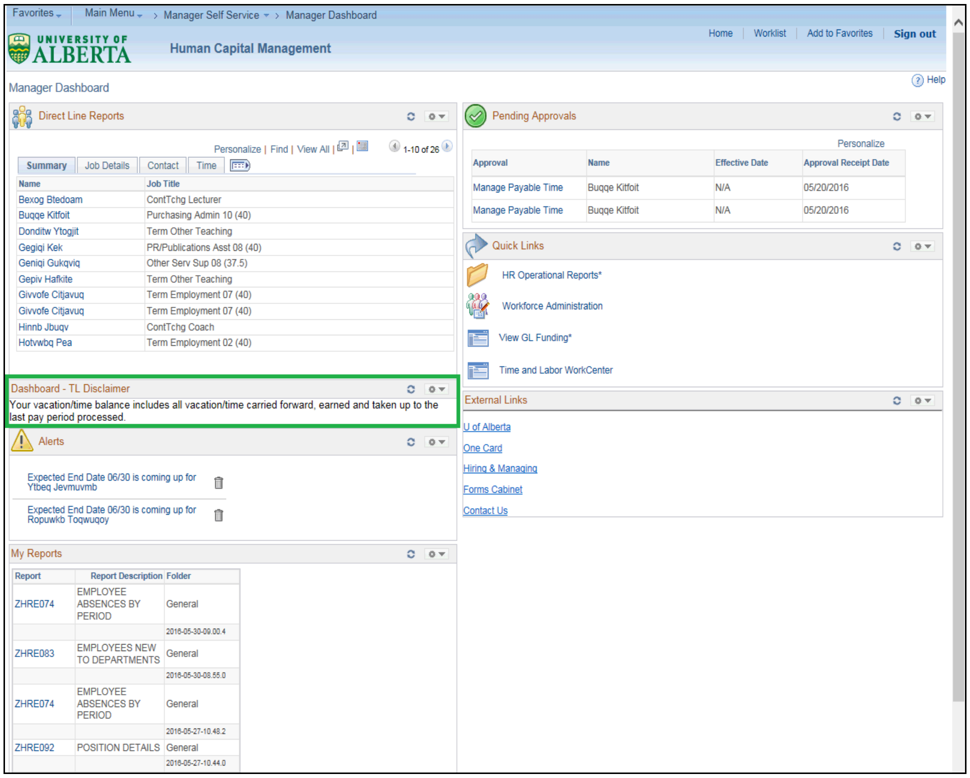
12. This Time tab shows the Compensatory, Vacation and General Illness balances for your direct reports.



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**'.



14. **Dashboard TL Disclaimer**

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

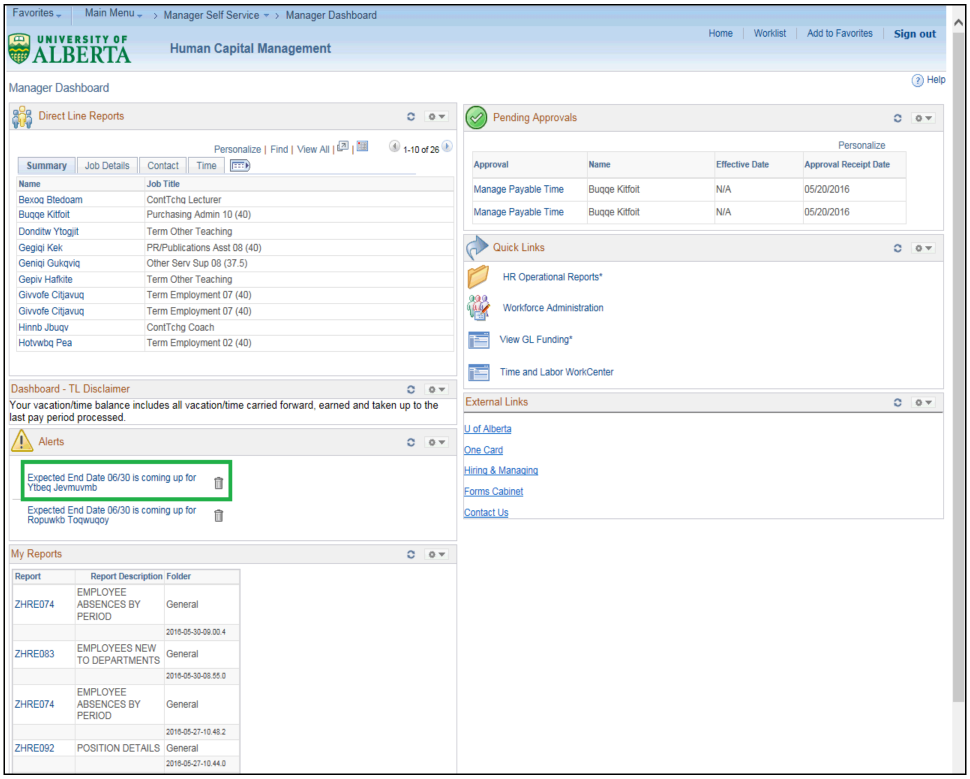
The balances shown on the Time tab are as of the most recent pay period when the vacation was taken.

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

15. **Alerts**

The alerts you will see in this area include:

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



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 futher 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.**

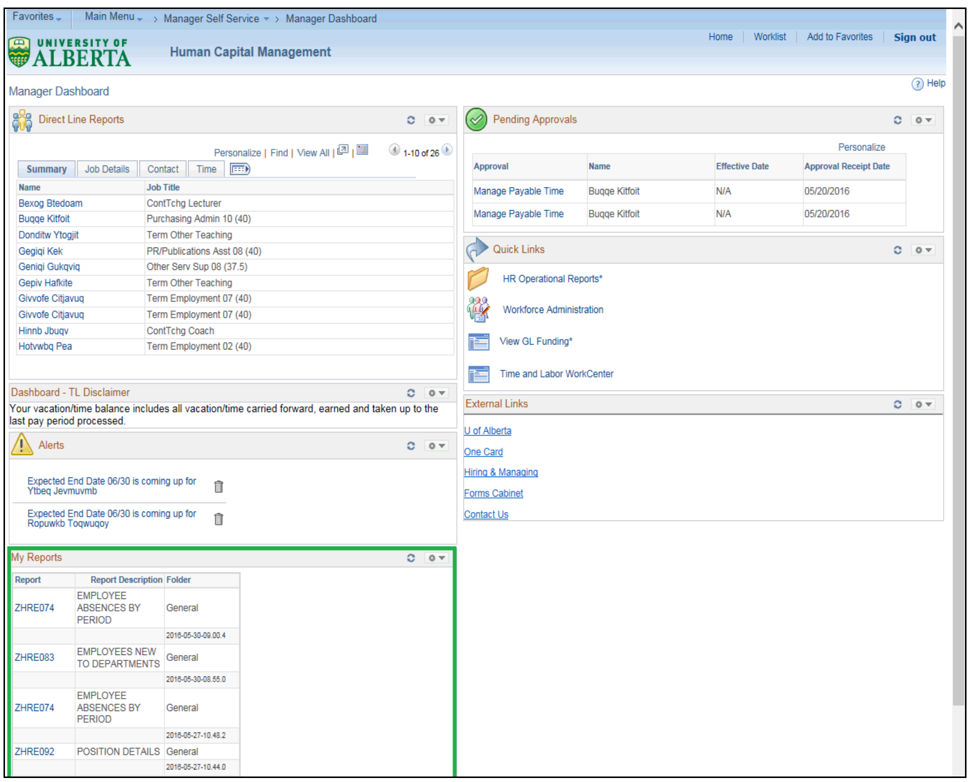
18. **Leave of Absence Expected Return Date:**

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.**

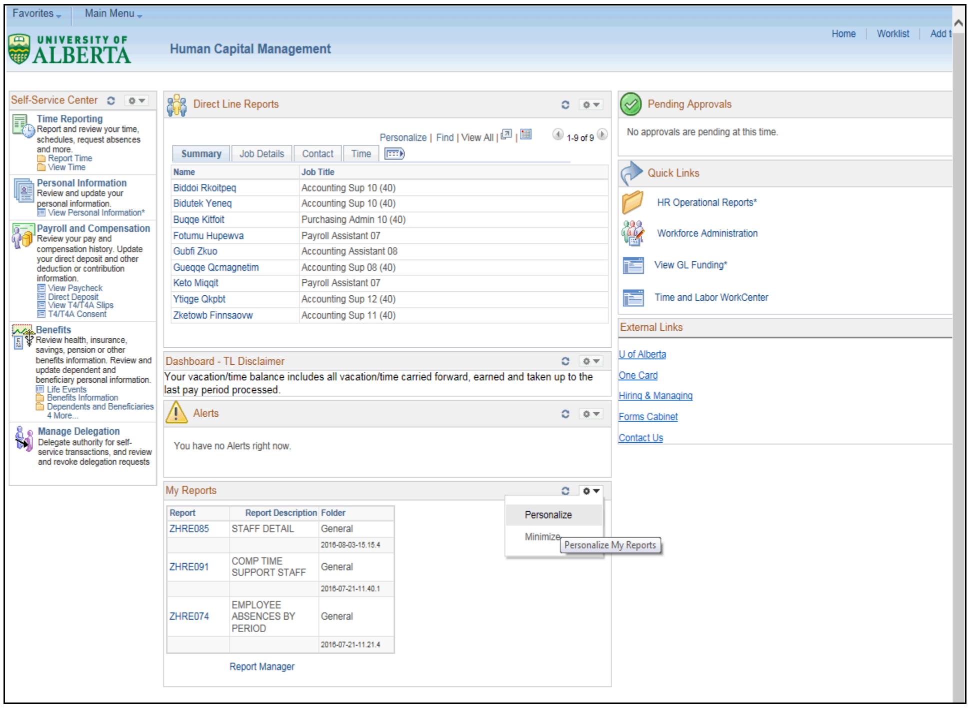


19. **My Reports**

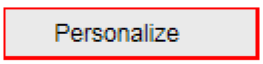
This area provides a list of the last 5 reports you have run and on what date.

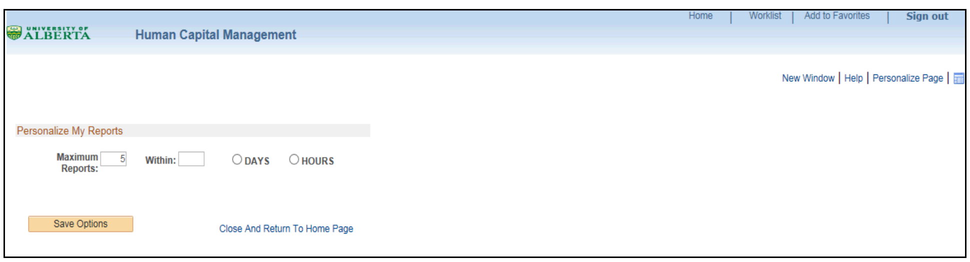
20. The default settings for this pagelet are set to display only 5 reports.

Click the **Pagelet Settings** button.



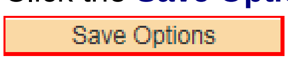
21. Click the **Personalize** link.



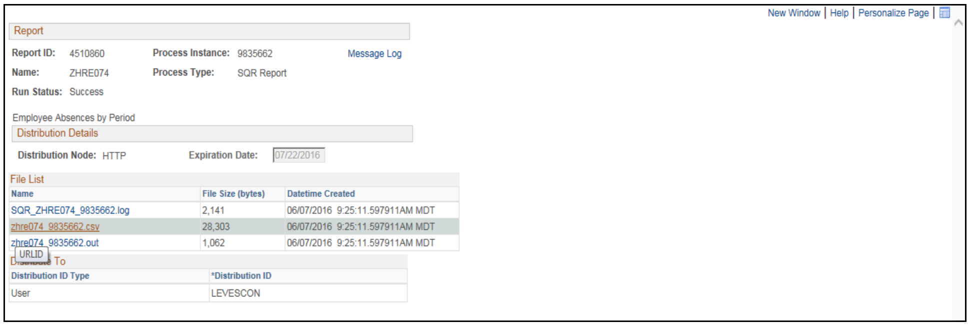


22. **DO NOT** change these settings.

    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.

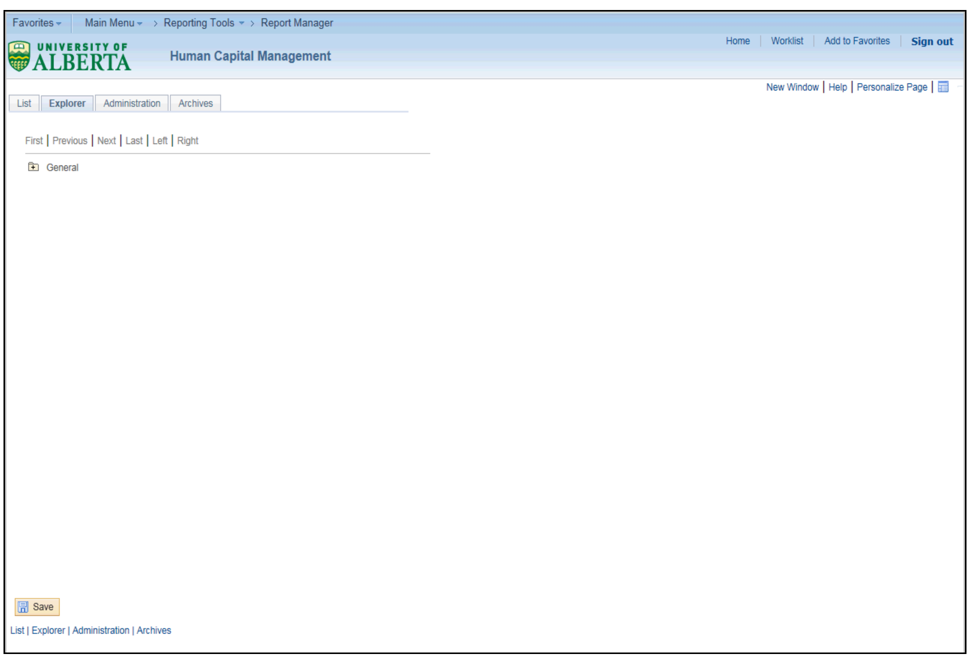
    For example the ZHRE074 Report is set to return a CSV formatted report.

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

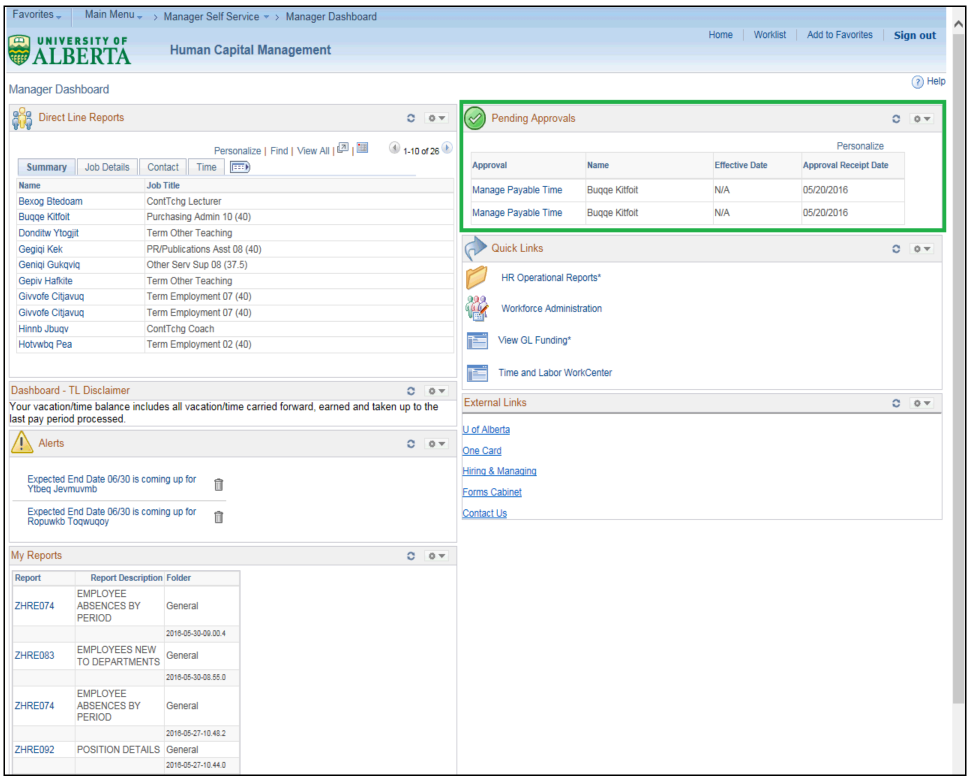


26. In the Report Manager page under the Explorer tab, Click the **Folder Icon** object.

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.

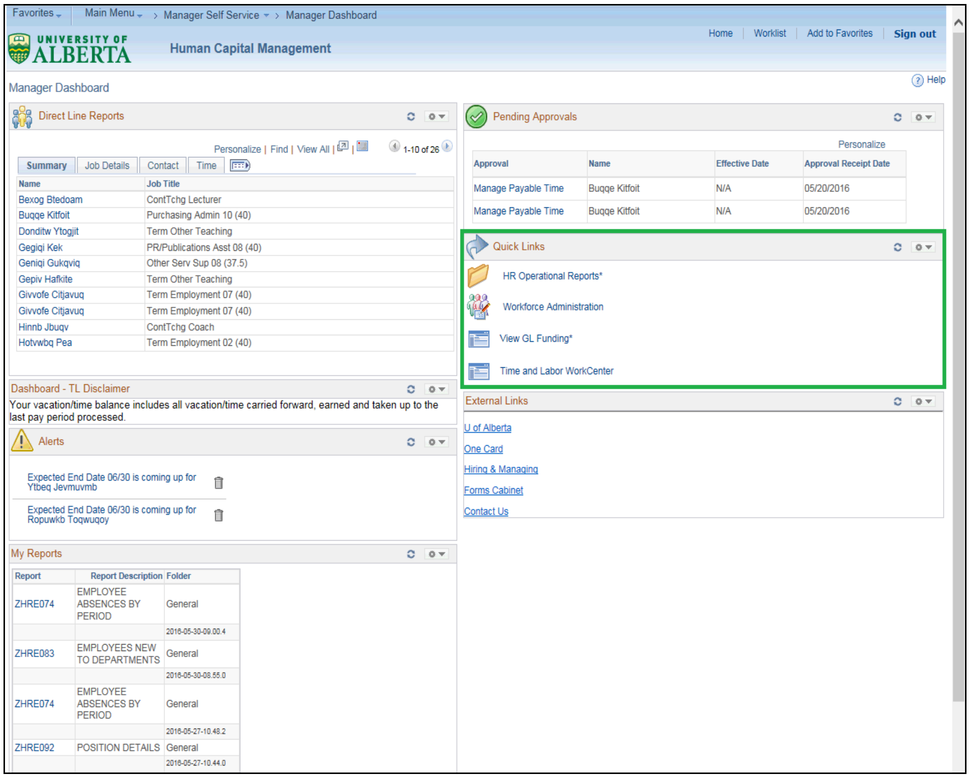
    To close the page and navigate to another folder, Click the **Save** button.



28. **Pending Approvals**

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

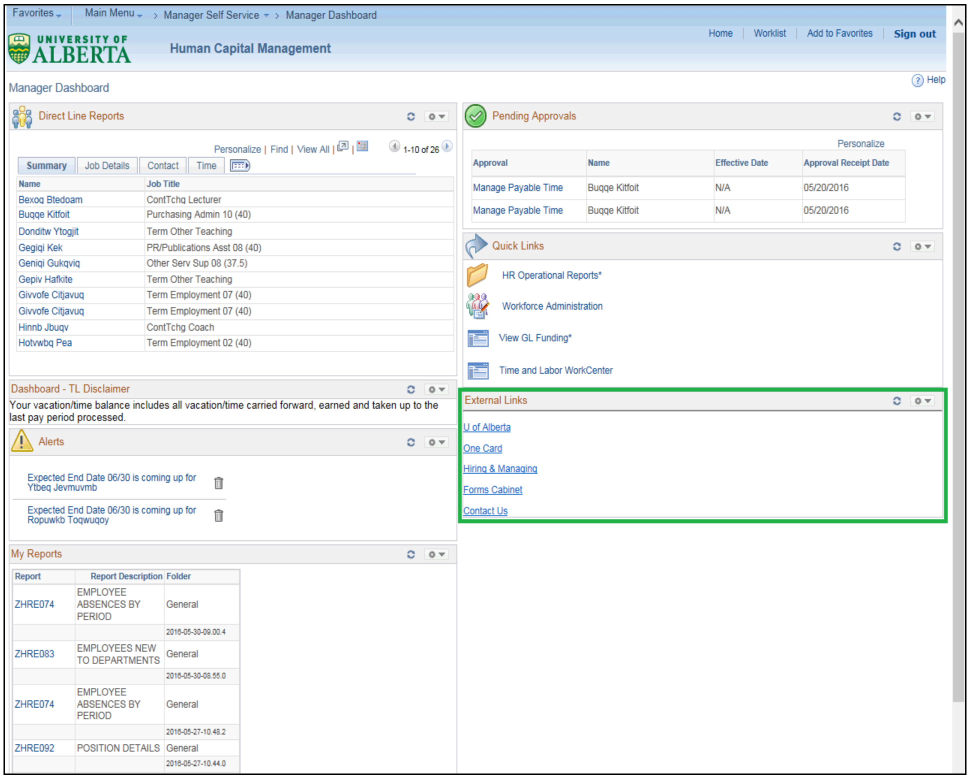
    It is recommended that you navigate to the <u>Time and Labor WorkCenter</u> on the Quick Links Pagelet to approve the payable hours listed.



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.