
UNIVERSITY OF ALBERTA

PeopleSoft HCM

Managing Payable Time as a Proxy



Prepared by: HR Operations

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Managing Payable Time as a Proxy

Overview

This section will provide an understanding of the role as a delegated approver. You will be provided a walkthrough of how to accept a delegation request and how to approve the delegated payable time.

Objectives

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

- Accepting a Delegation Request
- Approving Payable Time as a Delegate

Related Reference Material

Reference Materials may include Training Guides, Job Aids, Quick Reference Guides, and Additional Reference Materials.

Links to all PeopleSoft HCM materials are available at the end of each topic.

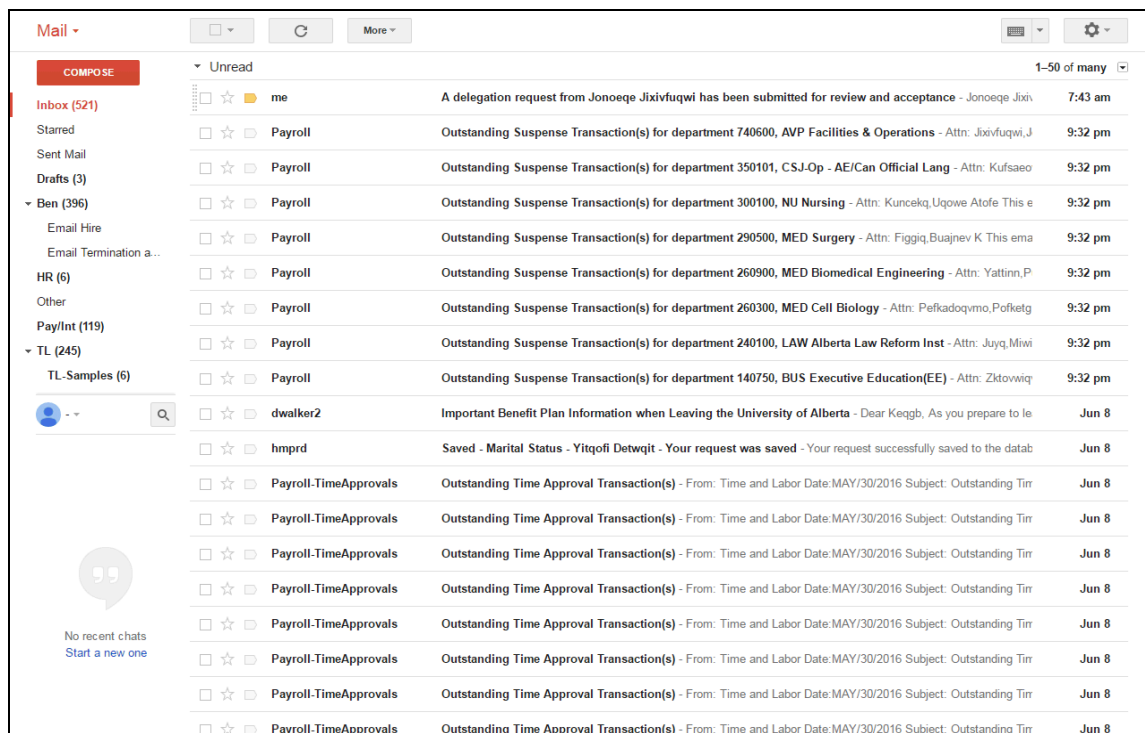
Accepting a Delegation Request

In this topic, you will learn how to accept a delegation request from a Manager/Supervisor.

Procedure

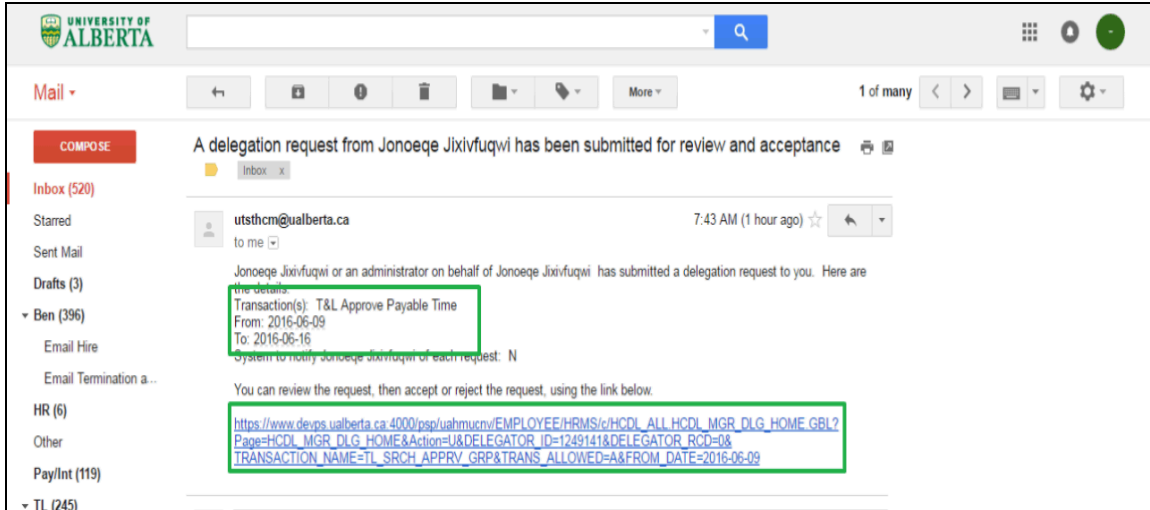
The first step to accept a delegation request is to receive an email with the request.

1. When a Supervisor submits a delegation request, the system automatically creates and sends an e-mail to the person they requested as a delegate.



2. In your e-mail inbox, click the **Delegation Request e-mail**.
3. Review the e-mail for the details of the delegation request.

In this example, the delegation request is to Approve Time and Labor Payable Time from June 9, 2016 up to and including June 16, 2016.

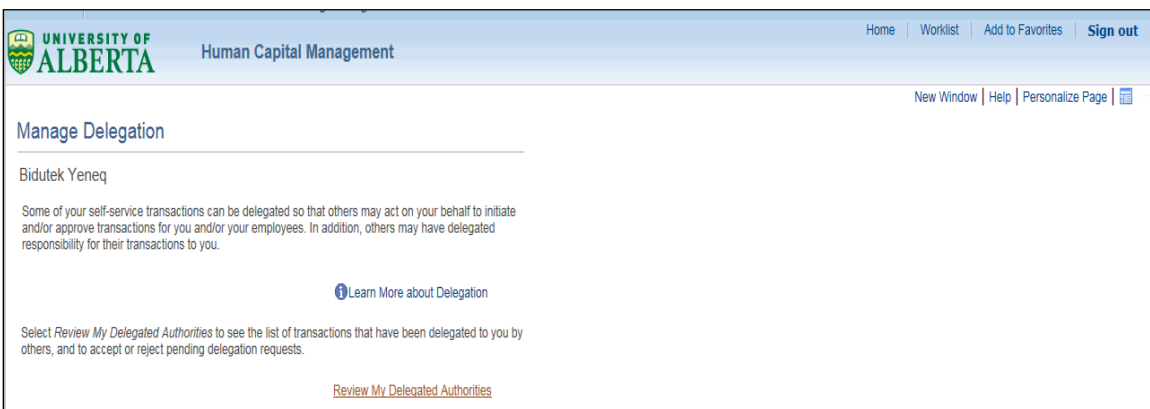


- The link provided within the e-mail will take you to the Manage Delegation page in PeopleSoft HCM.

Click the **Link in the e-mail**.

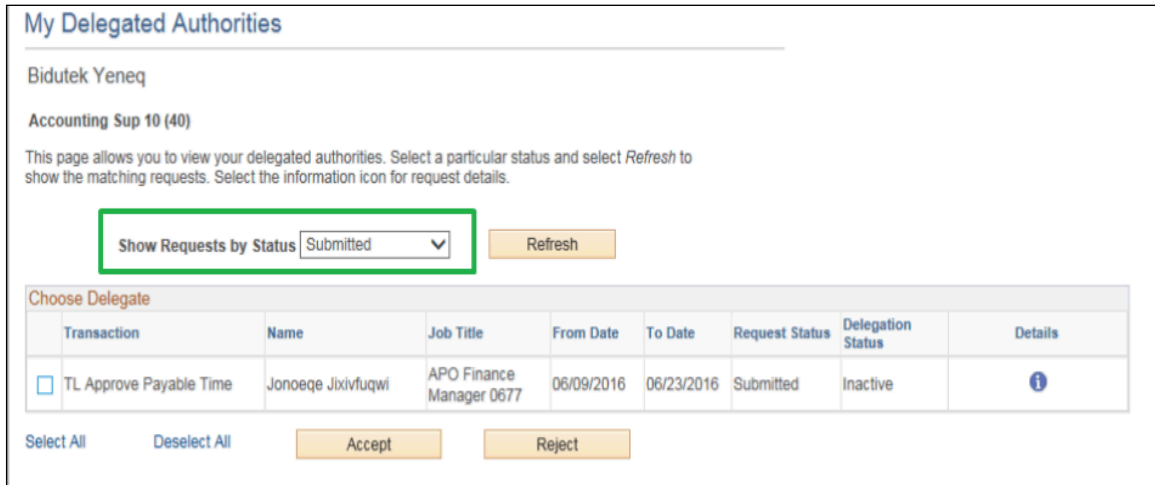
- When you click on the e-mail link, you may be prompted to sign in once more using your network CCID and Password.
- From the login page, you will automatically be directed to the PeopleSoft HCM **Manage Delegation** page.

Click the **Review My Delegated Authorities** link.



7. The **My Delegated Authorities** page allows you to view your delegated authorities.

The **Show Requests by Status** field will default to '**Submitted**' which indicates that only those transactions that are waiting for either your acceptance or rejection will be displayed.



My Delegated Authorities

Bidutek Yeneq

Accounting Sup 10 (40)

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

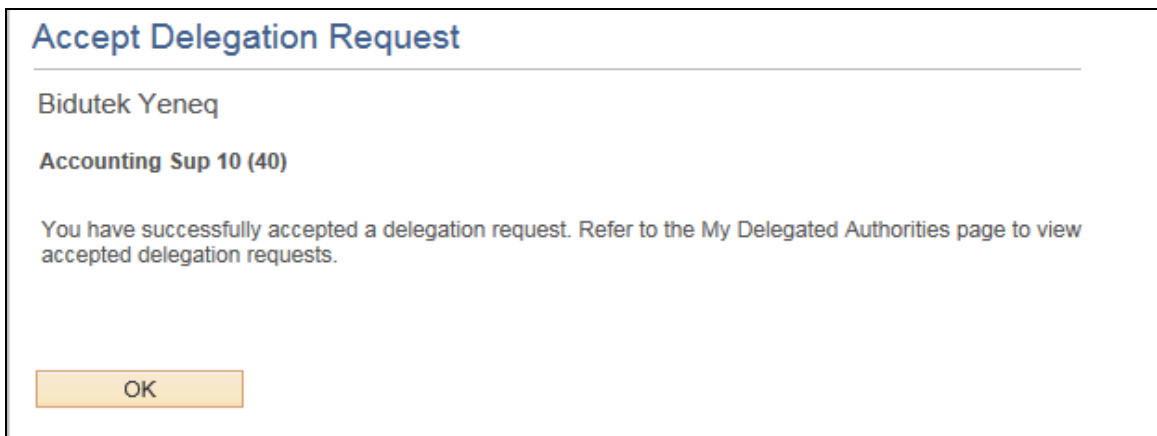
Show Requests by Status: Submitted

Choose Delegate							
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/> TL Approve Payable Time	Jonoeqe Jixivfuqwi	APO Finance Manager 0677	06/09/2016	06/23/2016	Submitted	Inactive	

Select All Deselect All

Select the box before the **Transaction** item.

8. Ensure the appropriate line is selected and click the **Accept** button.
9. The **Accept Delegation Request** page indicates if your acceptance was successful or not.



Accept Delegation Request

Bidutek Yeneq

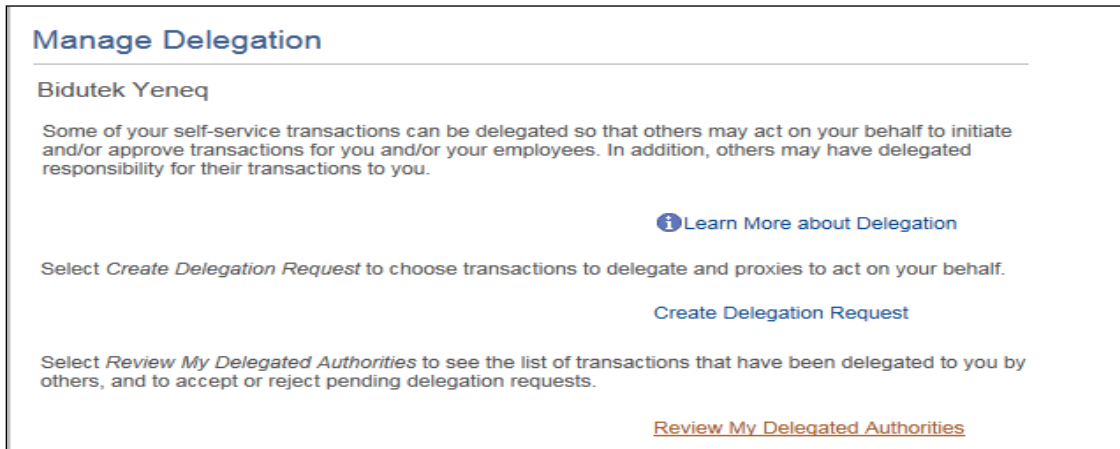
Accounting Sup 10 (40)

You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.

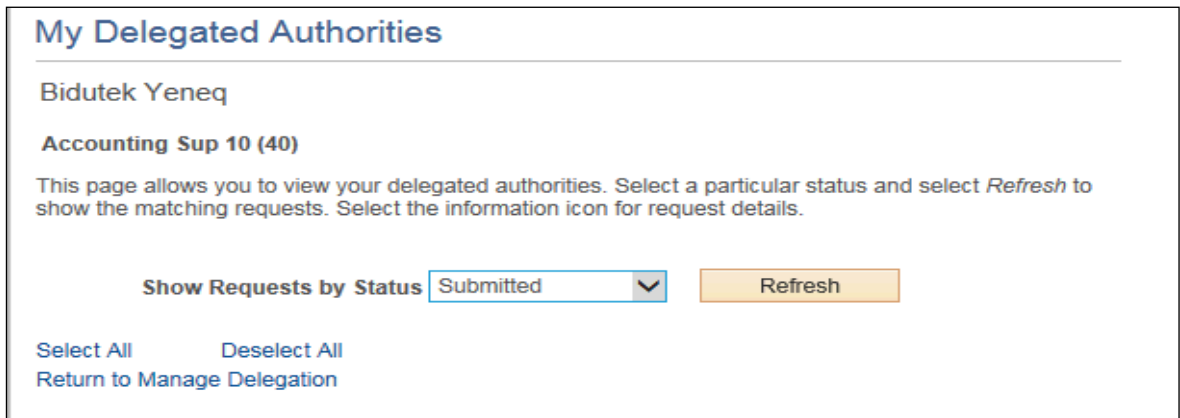
10. Click the **OK** button.

Note: Once you accept a Delegation Request the system automatically provides you access to the approval pages, even if you did not have approval authority prior to accepting the delegation.

- 11. The system will automatically generate and send an e-mail to the requestor indicating your acceptance.
- 12. To view the status of transactions delegated to you click the **Review My Delegated Authorities** option.



- 13. In the **My Delegated Authorities** page click the down arrow next to the **Show Requests by Status** field.



- 14. Click an entry in the list.
In this example, click the **Accepted** list item.
- 15. Click the **Refresh** button.
- 16. A list of your delegated authority transactions for the specified status will appear.

My Delegated Authorities

Bidutek Yeneq

Accounting Sup 10 (40)

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status Accepted Refresh

Choose Delegate								
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details	
<input type="checkbox"/>	TL Approve Payable Time	Jonoeqe Jixivfuqwi	APO Finance Manager 0677	06/09/2016	06/16/2016	Accepted	Active	i

[Select All](#) [Deselect All](#)
[Return to Manage Delegation](#)


17. The Delegated Authority for the time period you agreed to should show Accepted and Active.


To exit from this page, Click the **Return To Manage Delegation** option.

18. Congratulations! You have completed the training on how to Accept a Delegation Request.


For reference materials and more tutorials please see the links provided below.

End of Procedure.






For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (<https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service>).



For **HR Professionals**, all PeopleSoft HCM Learning Reference Materials are available within the Human Resource Services website under the PeopleSoft Training web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training>).



Refer to the Online Learning web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning>) within the Human Resource Services website for all Online Tutorials and videos.

Approving Payable Time as a Proxy

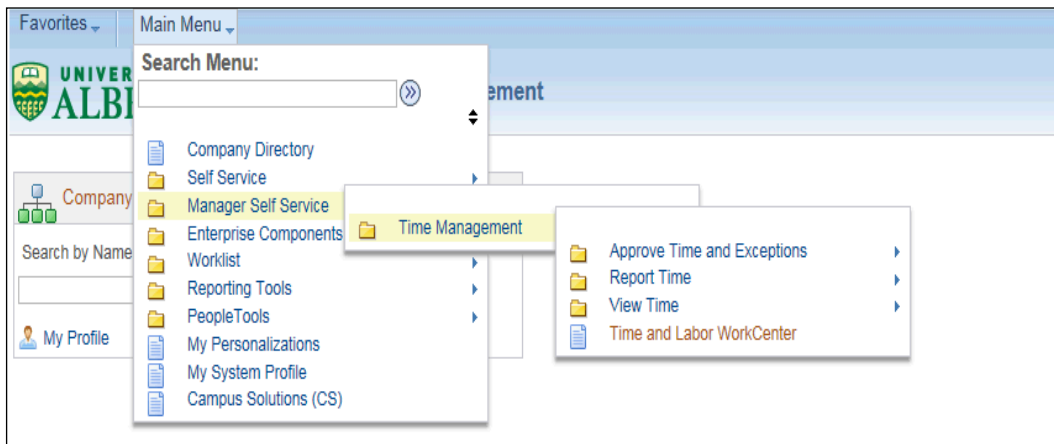
In this topic, you will learn how to approve payable time on behalf of another Supervisor or time approver.

Procedure

Navigation Path: [Main Menu](#) > [Manager Self Service](#) > [Time Management](#) > [Time and Labor WorkCenter](#)

1. Delegated Approvers who do not have Direct Reports will have access to the Time and Labor WorkCenter for the duration of the delegation request.

Click the **Time and Labor WorkCenter** menu.



Note: Once you navigate to the Time and Labor WorkCenter, a message will appear asking you to 'Choose Delegate'. This message will appear whether you are an approver yourself or not.

Select Role

Bidutek Yeneq

You have been delegated authority to process transactions for another employee(s). If you would like to process transactions for an employee other than yourself, select that employee, otherwise select "Process my own transaction".

Choose Delegate

Name	Job Title	Department	Supervisor Name
<input checked="" type="radio"/> Process my own transaction			
<input type="radio"/> Jonoeqe Jixivfuqwi	APO Finance Manager 0677	F&O Finance	Buqeng Fofmib

- If you have direct reports that you approve time for, you will perform approvals as yourself (Option 1) and then again as a delegate (Option 2).

Option 1: Approve payable time transactions for those that report to you. (*Process my own transaction*)

Option 2: Approve payable time as a delegate for the person listed.

- In this example you are approving time on behalf of another Manager or Supervisor, select the 2nd option from this example.

Select the box before the **Delegator's Name** item.

Select Role

Bidutek Yeneq

You have been delegated authority to process transactions for another employee(s). If you would like to process transactions for an employee other than yourself, select that employee, otherwise select 'Process my own transaction'.

Choose Delegate

Name	Job Title	Department	Supervisor Name
<input type="radio"/> Process my own transaction			
<input checked="" type="radio"/> Jonoqe Jixivfuqi	APO Finance Manager 0677	F&O Finance	Buqeng Fofmib

- Click the **Continue** button.
- The system does not automatically provide a list of transactions to approve. You need to enter information into the Employee Selection section.

Click the **Expand Employee Selection** button.

Approve Time | Report Time | View Time

Approve Payable Time | Manage Exceptions | Review and Manage Alerts

Employee Selection

Change Time in View

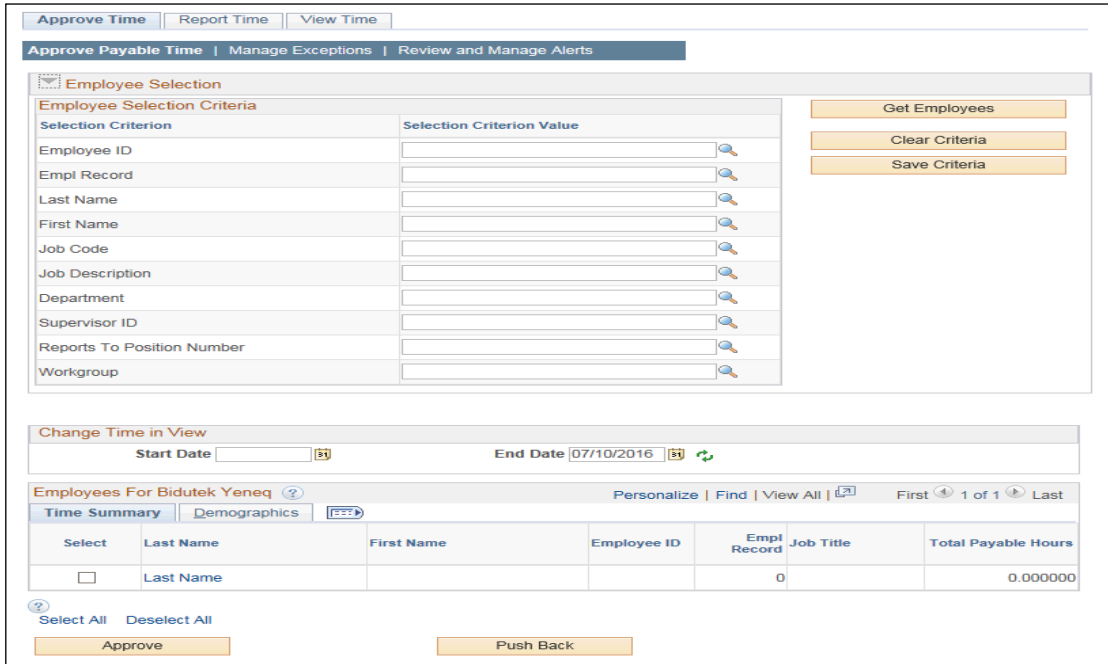
Start Date End Date 07/10/2016

Employees For Bidutek Yeneq Personalize | Find | View All | First 1 of 1 Last

Time Summary | Demographics

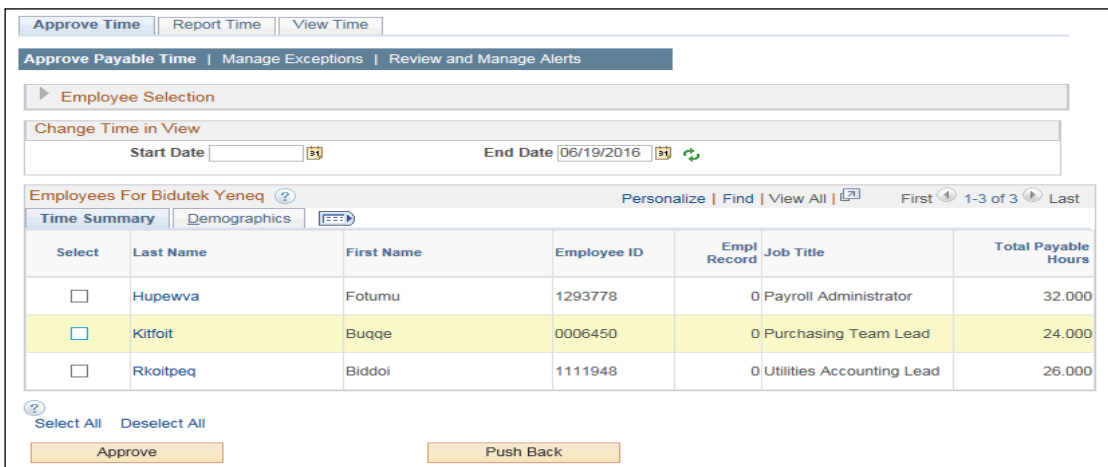
Select	Last Name	First Name	Employee ID	Empl Record	Job Title	Total Payable Hours
<input type="checkbox"/>	Last Name			0		0.000000

- To view all employee time transactions that have been delegated to you for approval, click the **Get Employees** button.



The screenshot shows the 'Approve Payable Time' interface. At the top, there are tabs for 'Approve Time', 'Report Time', and 'View Time'. Below these are navigation links: 'Approve Payable Time', 'Manage Exceptions', and 'Review and Manage Alerts'. The main section is titled 'Employee Selection' and contains a form for 'Employee Selection Criteria'. The form has two columns: 'Selection Criterion' and 'Selection Criterion Value'. The criteria listed are: Employee ID, Empl Record, Last Name, First Name, Job Code, Job Description, Department, Supervisor ID, Reports To Position Number, and Workgroup. To the right of the form are three buttons: 'Get Employees', 'Clear Criteria', and 'Save Criteria'. Below the form is a 'Change Time in View' section with 'Start Date' and 'End Date' (07/10/2016) fields. At the bottom, there is a section for 'Employees For Bidutek Yeneq' with a table. The table has columns: Select, Last Name, First Name, Employee ID, Empl Record, Job Title, and Total Payable Hours. The table is currently empty, showing only one row with a checkbox, 'Last Name', and '0.000000'.

- All employees with payable time ready for approval will show on this page.



The screenshot shows the 'Approve Payable Time' interface. At the top, there are tabs for 'Approve Time', 'Report Time', and 'View Time'. Below these are navigation links: 'Approve Payable Time', 'Manage Exceptions', and 'Review and Manage Alerts'. The main section is titled 'Employee Selection' and contains a form for 'Employee Selection Criteria'. Below the form is a 'Change Time in View' section with 'Start Date' and 'End Date' (06/19/2016) fields. At the bottom, there is a section for 'Employees For Bidutek Yeneq' with a table. The table has columns: Select, Last Name, First Name, Employee ID, Empl Record, Job Title, and Total Payable Hours. The table contains three rows:

Select	Last Name	First Name	Employee ID	Empl Record	Job Title	Total Payable Hours
<input type="checkbox"/>	Hupewva	Fotumu	1293778	0	Payroll Administrator	32.000
<input type="checkbox"/>	Kitfoit	Buqqe	0006450	0	Purchasing Team Lead	24.000
<input type="checkbox"/>	Rkoitpeq	Biddoi	1111948	0	Utilities Accounting Lead	26.000

Below the table are buttons for 'Select All', 'Deselect All', 'Approve', and 'Push Back'.

8. Approving Payable Time

Click the **Select** option for the line you want to view the details for.

- To view the detailed time transactions for an employee, click the **Last Name** link.

10. A detailed list of the hours worked will appear. Review each line for accuracy.

Click the **Select** option for those lines you want to approve.

Approve Payable Time

Buqqa Kitfoit Employee ID 0006450
 Purchasing Team Lead Employment Record 0
 Actions ▾ Previous Employee Next Employee

Start Date
End Date 06/19/2016

Approval Details ?

Select	Date	Time Reporting Code	TRC Descr	Status	Quantity	Type	Business Unit	Combination Code
<input type="checkbox"/>	06/10/2016	855	Casual Illness Leave	Needs Approval	8.000	Hours		
<input type="checkbox"/>	06/13/2016	800	Vacation Time Taken	Needs Approval	8.000	Hours		
<input type="checkbox"/>	06/14/2016	665	Bank Time Taken	Needs Approval	8.000	Hours		

Select All Deselect All

[Return to Approval Summary](#)

11. Click the **Approve** button.

A message will appear asking you to verify that you want to approve the selected transactions.

Click the **Yes** button.

Message

Are you sure you want to approve the time selected? (13504,2500)

Once Approved the status cannot be reverted back.

Select Yes to confirm and complete the status change, No to return to the page without updating the status.

12. Another message will appear confirming your SAVE was successful.

Click the **OK** button.

13. Click the **Return to Approval Summary** link.

Approve Payable Time

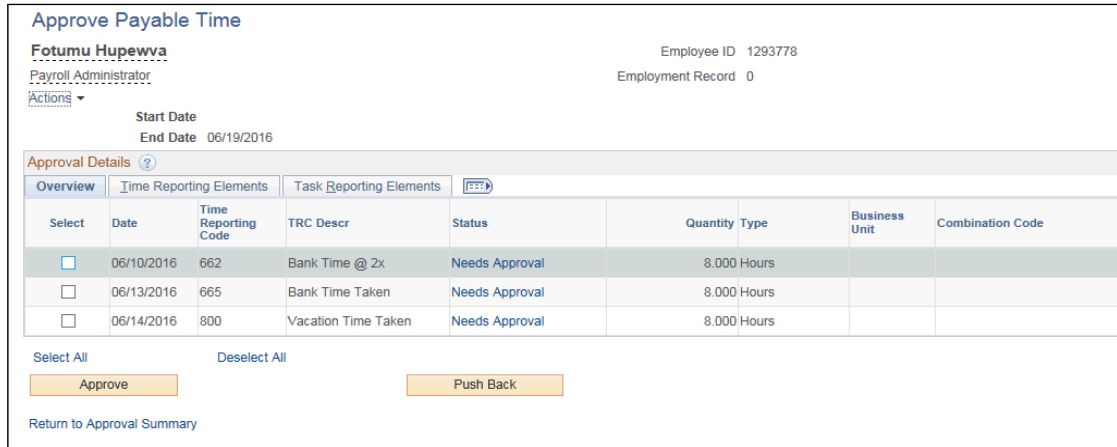
Buqqa Kitfoit Employee ID 0006450
 Purchasing Team Lead Employment Record 0
 Actions ▾ Previous Employee Next Employee

Start Date
End Date 06/19/2016

[Return to Approval Summary](#)

14. Pushing Back Payable Time

If there is a transaction that requires fixing, view the details of the employee's time and click the **Select** option for the line you want that needs to be corrected.



Approve Payable Time
Fotumu Hupewwa Employee ID 1293778
 Payroll Administrator Employment Record 0
 Start Date
 End Date 06/19/2016

Approval Details

Select	Date	Time Reporting Code	TRC Descr	Status	Quantity Type	Business Unit	Combination Code
<input checked="" type="checkbox"/>	06/10/2016	662	Bank Time @ 2x	Needs Approval	8.000 Hours		
<input type="checkbox"/>	06/13/2016	665	Bank Time Taken	Needs Approval	8.000 Hours		
<input type="checkbox"/>	06/14/2016	800	Vacation Time Taken	Needs Approval	8.000 Hours		

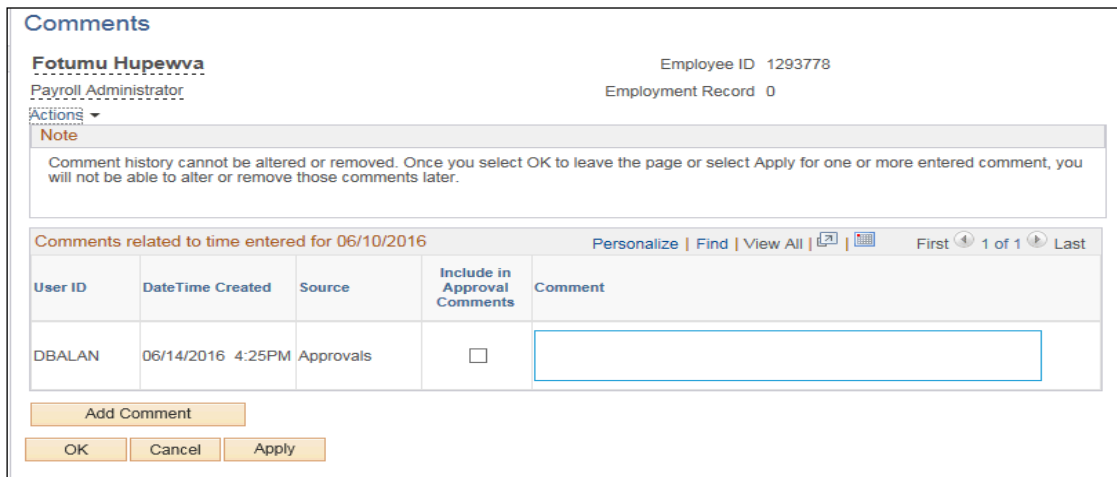
Select All Deselect All
 Approve Push Back
 Return to Approval Summary

15. Before pushing back the transaction, you need to add a comment describing what needs to be fixed.

On the far left of the screen, click the **Comments** button.

Note: You may need to scroll to the left to see the comments column.

16. Within the **Comments** page, click in the **Comment** field.



Comments
Fotumu Hupewwa Employee ID 1293778
 Payroll Administrator Employment Record 0

Note
 Comment history cannot be altered or removed. Once you select OK to leave the page or select Apply for one or more entered comment, you will not be able to alter or remove those comments later.

Comments related to time entered for 06/10/2016 Personalize | Find | View All | First 1 of 1 Last

User ID	DateTime Created	Source	Include in Approval Comments	Comment
DBALAN	06/14/2016 4:25PM	Approvals	<input type="checkbox"/>	

Add Comment
 OK Cancel Apply

17. Enter a comment as required.

In this example, enter **"Please correct these hours."** into the **Comment** field.

Comments

Fotumu Hupewwa Employee ID 1293778
 Payroll Administrator Employment Record 0
 Actions ▾

Note

Comment history cannot be altered or removed. Once you select OK to leave the page or select Apply for one or more entered comment, you will not be able to alter or remove those comments later.

Comments related to time entered for 06/10/2016 Personalize | Find | View All | [?] | [] | First 1 of 1 Last

User ID	DateTime Created	Source	Include in Approval Comments	Comment
DBALAN	06/14/2016 4:25PM	Approvals	<input type="checkbox"/>	Please correct these hours.

Add Comment

OK Cancel Apply

18. Click the **OK** button.

19. Remember to only Pushback the *incorrect hours* and not the hours for the entire day.

Click the **Push Back** button.

Approve Payable Time

Fotumu Hupewwa Employee ID 1293778
 Payroll Administrator Employment Record 0
 Actions ▾

Start Date
End Date 06/19/2016

Approval Details ?

Overview		Time Reporting Elements	Task Reporting Elements					
Select	Date	Time Reporting Code	TRC Descr	Status	Quantity	Type	Business Unit	Combination Code
<input checked="" type="checkbox"/>	06/10/2016	662	Bank Time @ 2x	Needs Approval	8.000	Hours		
<input type="checkbox"/>	06/13/2016	665	Bank Time Taken	Needs Approval	8.000	Hours		
<input type="checkbox"/>	06/14/2016	800	Vacation Time Taken	Needs Approval	8.000	Hours		

Select All Deselect All

Approve Push Back

[Return to Approval Summary](#)

20. Click the **Yes** button.

Message

Are you sure you want to push back the time selected to the originator? (13504,10158)

Select Yes to confirm and complete the transaction, No to return to the page without updating the status.

21. Click the **OK** button.

22. Click the **Return to Approval Summary** link.



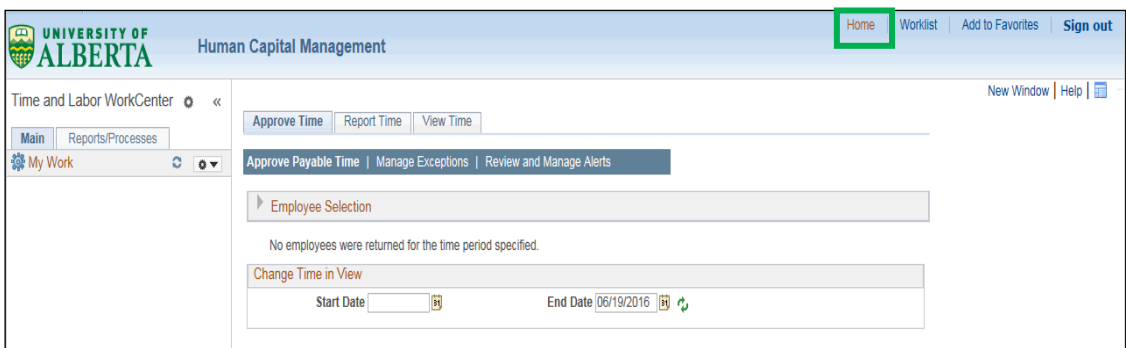
Approve Payable Time

Fotumu Hupewva Employee ID 1293778
Payroll Administrator Employment Record 0

Start Date
End Date 06/19/2016

[Return to Approval Summary](#)

23. To navigate back to the Main Menu click the **Home** link.



UNIVERSITY OF ALBERTA Human Capital Management

Home Worklist Add to Favorites Sign out

Time and Labor WorkCenter

Approve Time Report Time View Time

Approve Payable Time | Manage Exceptions | Review and Manage Alerts

Employee Selection

No employees were returned for the time period specified.


Change Time in View

Start Date End Date 06/19/2016


24. Congratulations! You have completed training on Approving Payable Time as a Delegate.

For reference materials and more tutorials please see the links provided below.


End of Procedure.



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Refer to the Online Learning web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning>) within the Human Resource Services website for all Online Tutorials and videos.