UNIVERSITY OF ALBERTA

PeopleSoft HCM

Managing Payable Time as a Proxy

Prepared by: HR Operations

Created on 7/25/2018 12:54:00 PM

Table of Contents

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.

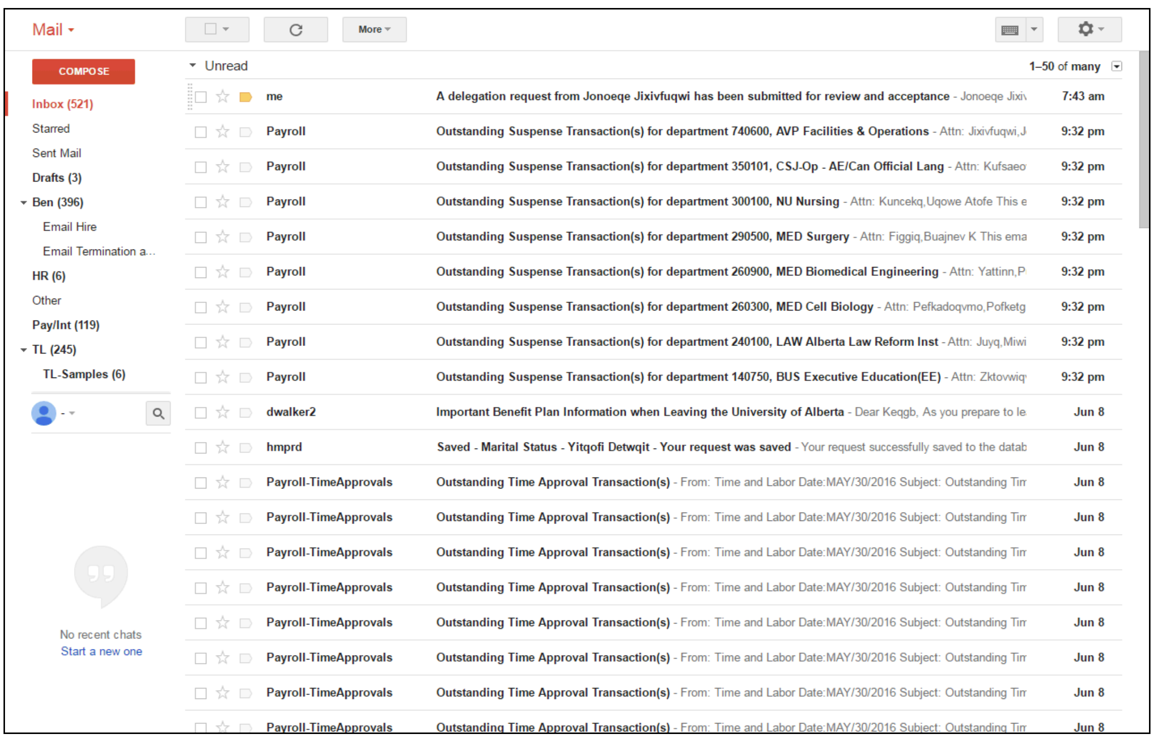
Accepting a Delegation Request

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.

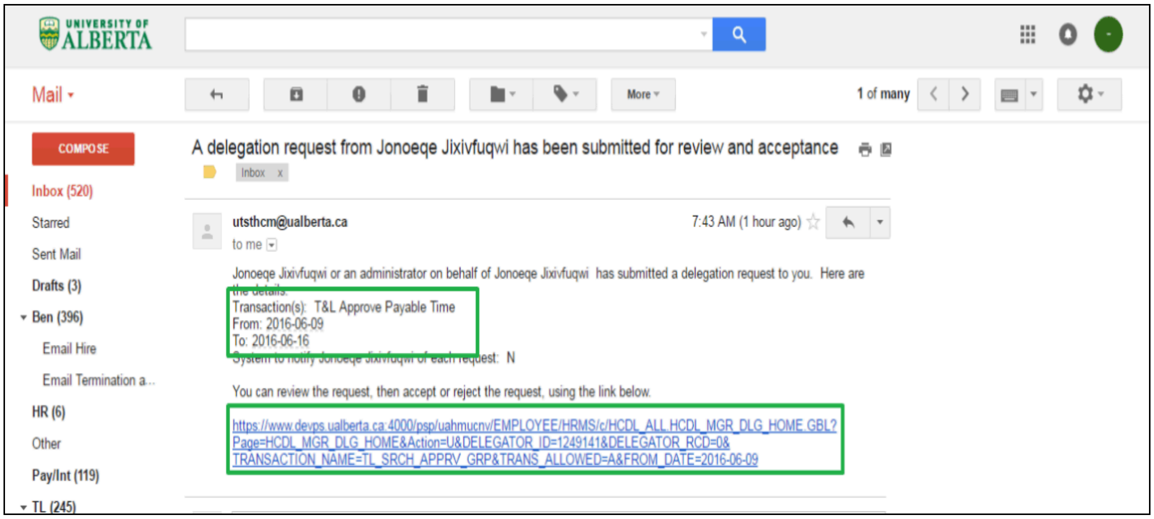
1. When a Supervisor submits a delegation request, the system automatically creates and sends an e-mail to the person they requested as a delegate.



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.



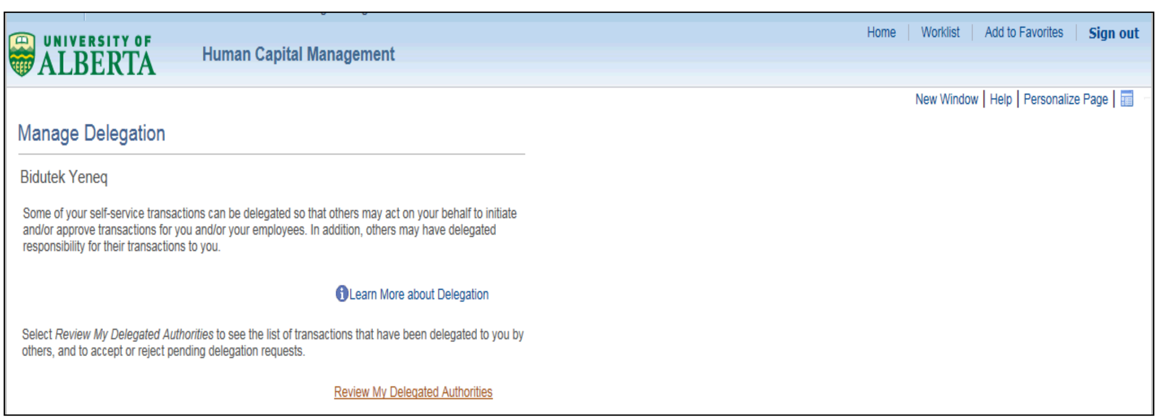
4. The link provided within the e-mail will take you to the Manage Delegation page in PeopleSoft HCM.

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

5. When you click on the e-mail link, you may be prompted to sign in once more using your network CCID and Password.

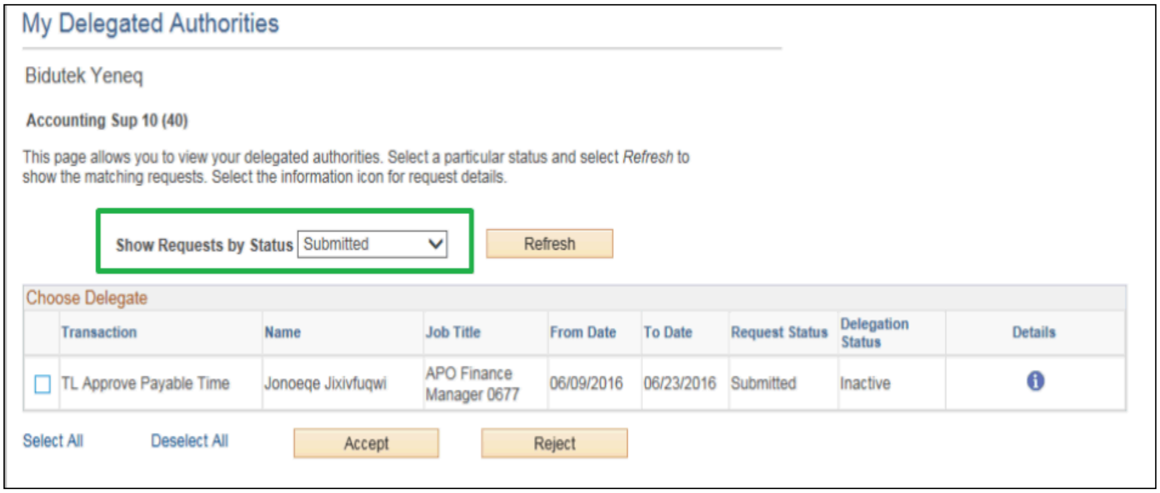
6. From the login page, you will automatically be directed to the PeopleSoft HCM **Manage Delegation** page.

   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.



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

8. Ensure the appropriate line is selected and click the **Accept** button.

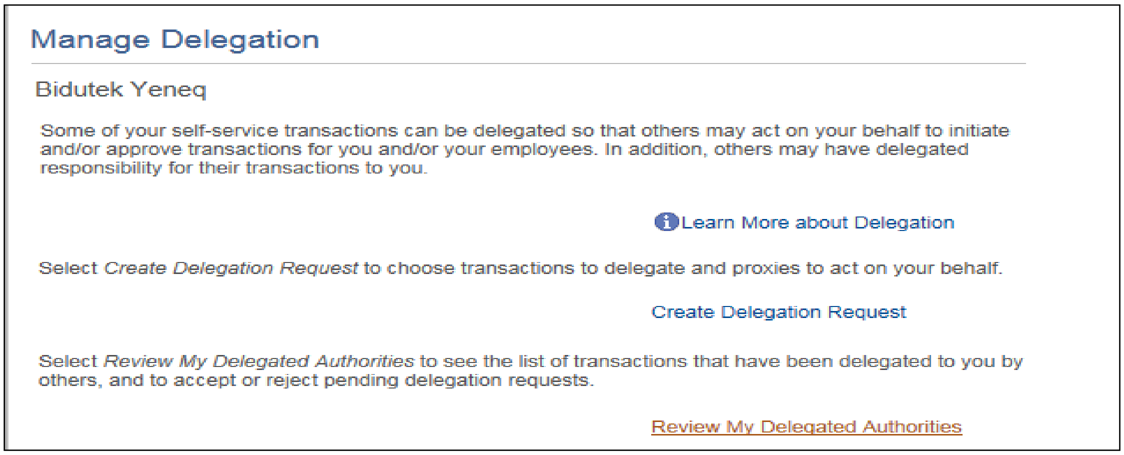
9. The **Accept Delegation Request** page indicates if your acceptance was successful or not.

10. Click the **OK** button.

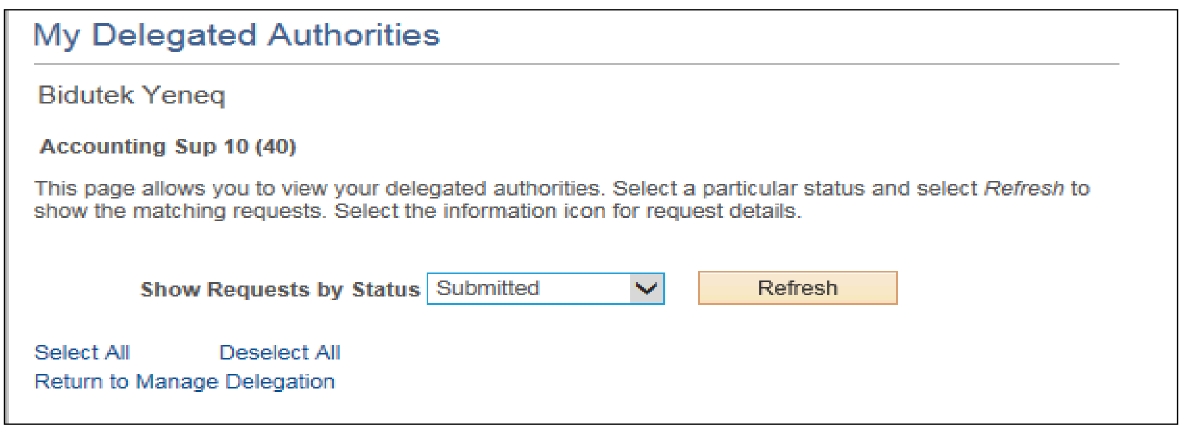
    Note: Once you accept a Delegation Request the system automatically provides you access to the approval pages, even if you did not have approval authority prior to accepting the delegation.

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.

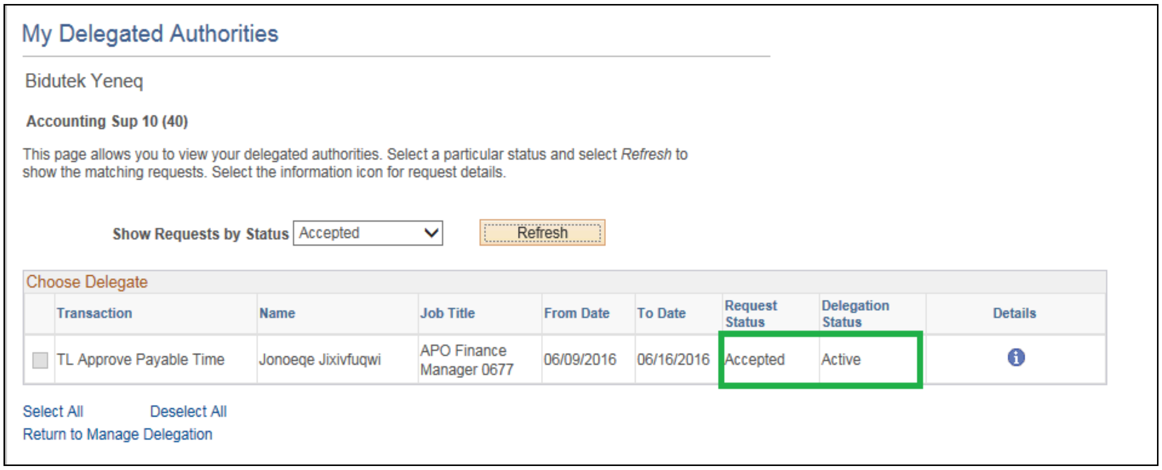


14. Click an entry in the list.

    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.



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 Professionsals**, 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

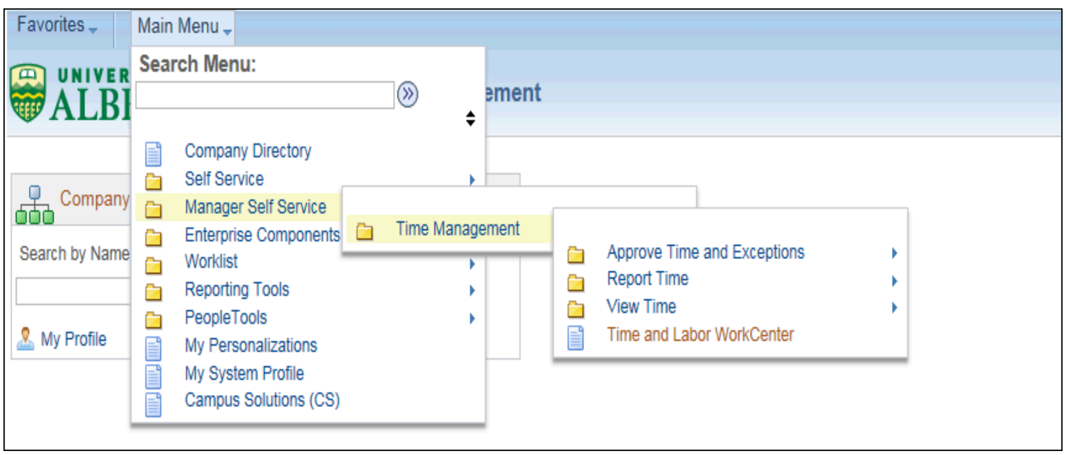
In this topic, you will learn how to approve payable time on behalf of another Supervisor or time approver.

Procedure

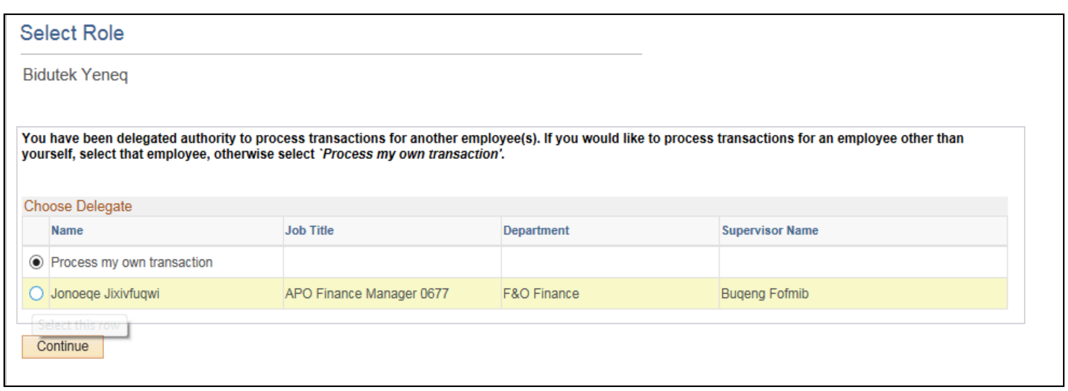
Navigation Path: Main Menu > Manager Self Service > Time Management > Time and Labor WorkCenter

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.



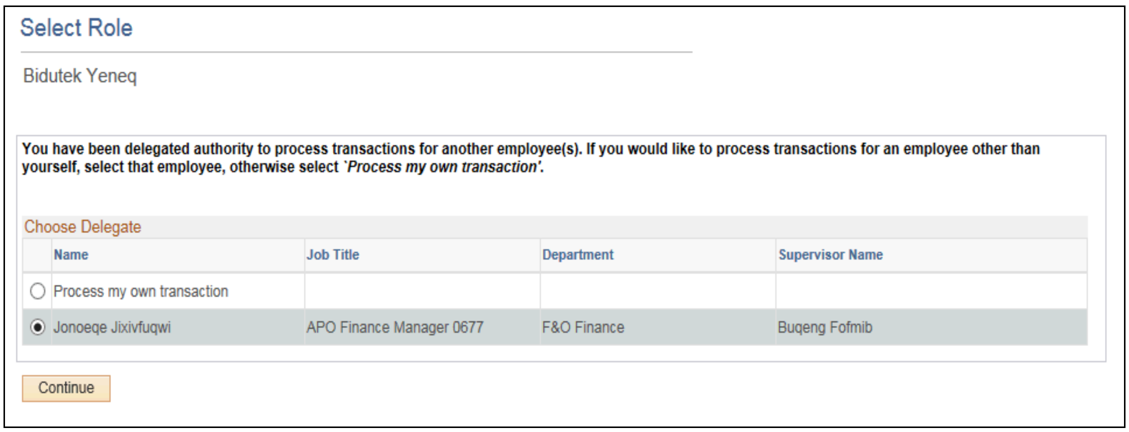
2. If you have direct reports that you approve time for, you will perform approvals as yourself (Option 1) and then again as a delegate (Option 2).

   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.

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

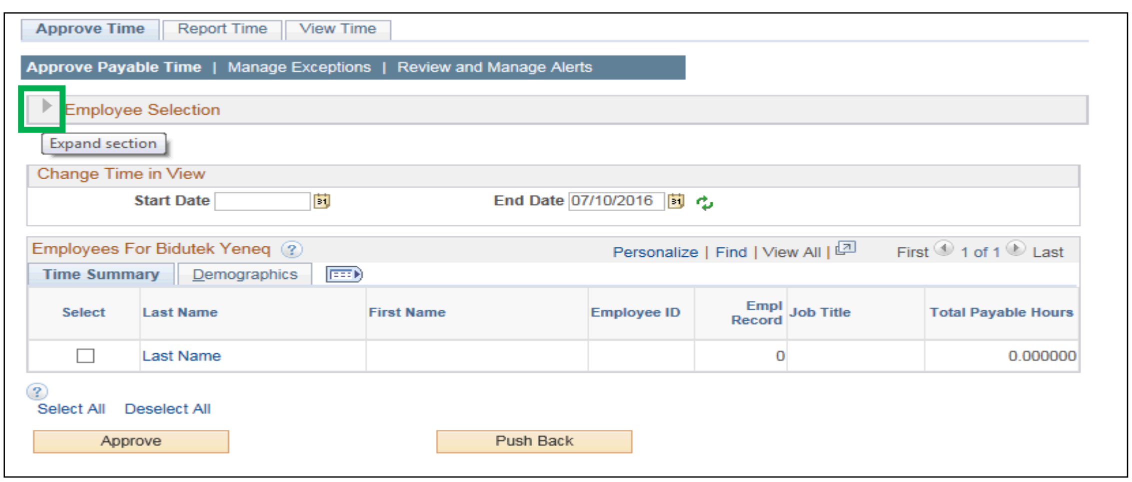
   Select the box before the **Delegator's Name** item.



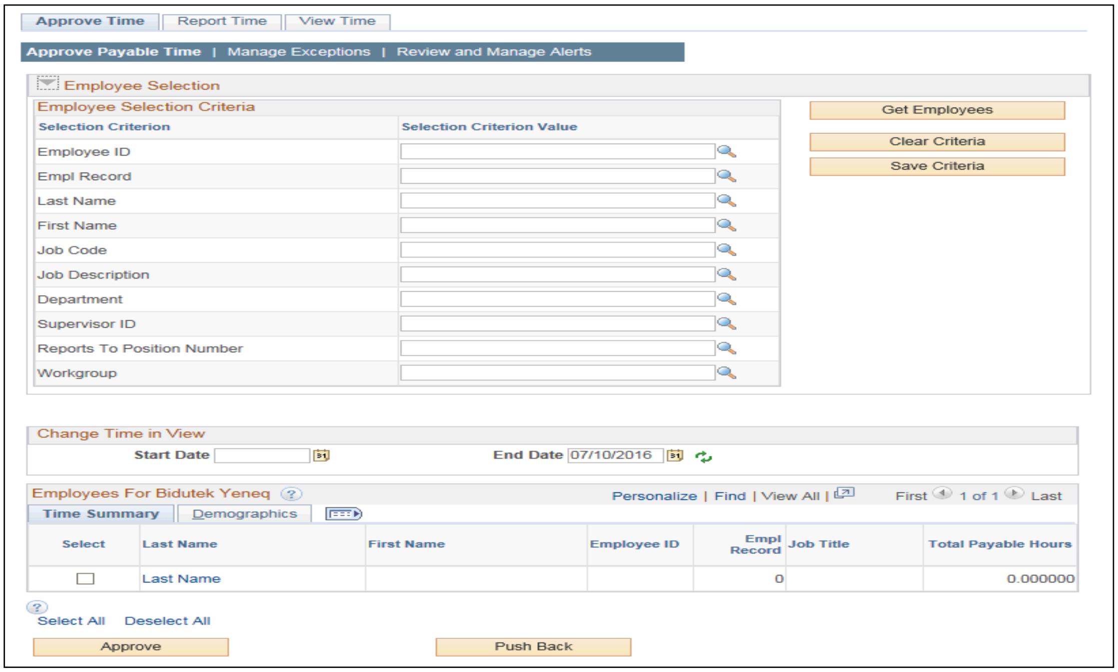
4. Click the **Continue** button.

5. The system does not automatically provide a list of transactions to approve. You need to enter information into the Employee Selection section.

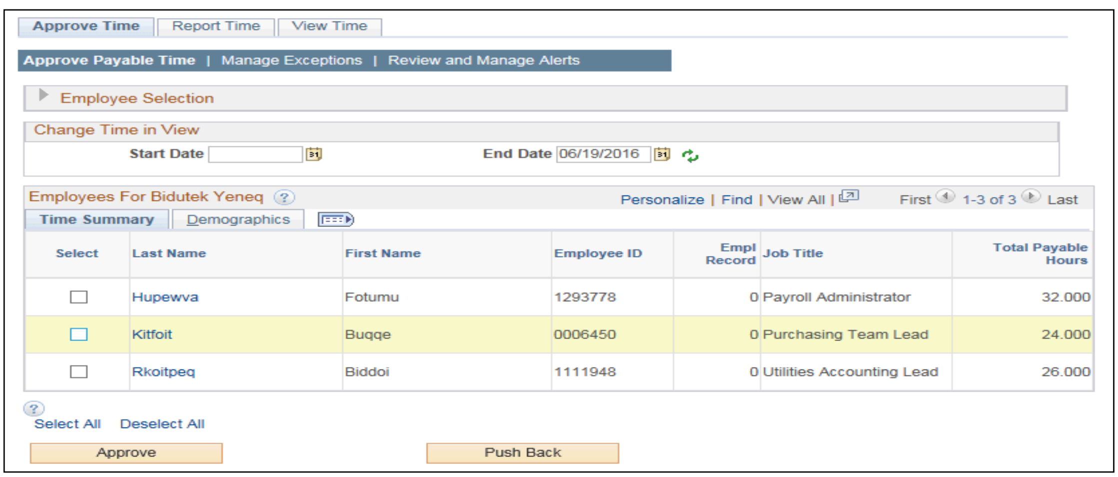
   Click the **Expand Employee Selection** button.



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



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



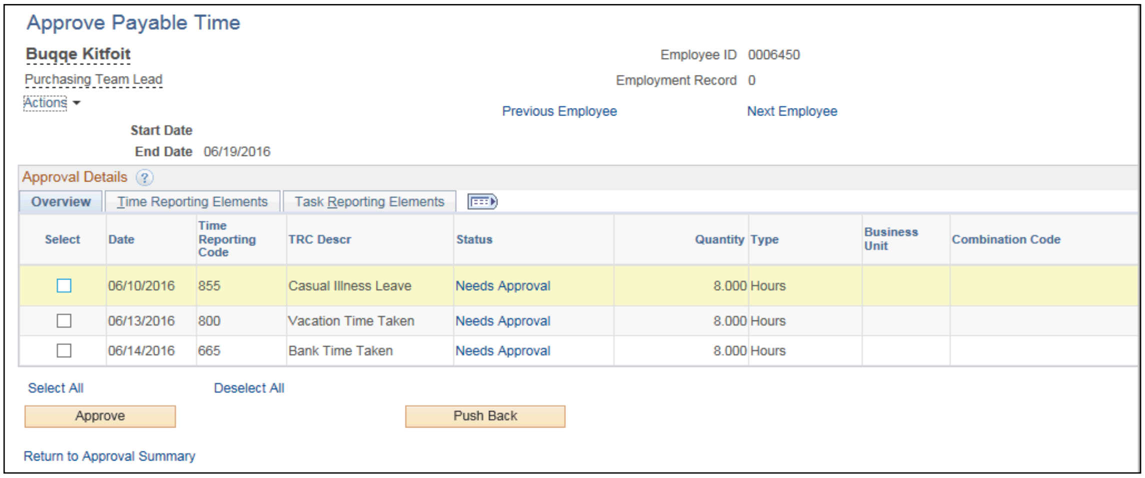
8. **Approving Payable Time**

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

9. 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.

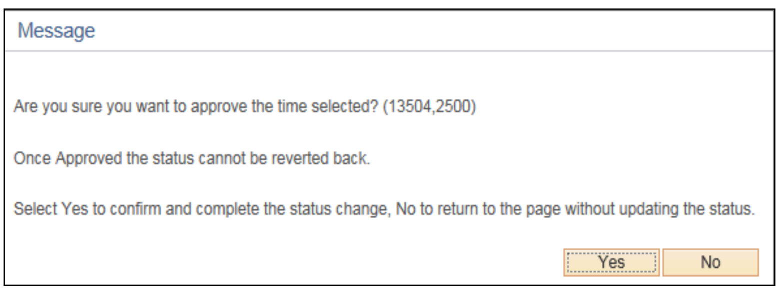
    Click the **Select** option for those lines you want to approve.



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.



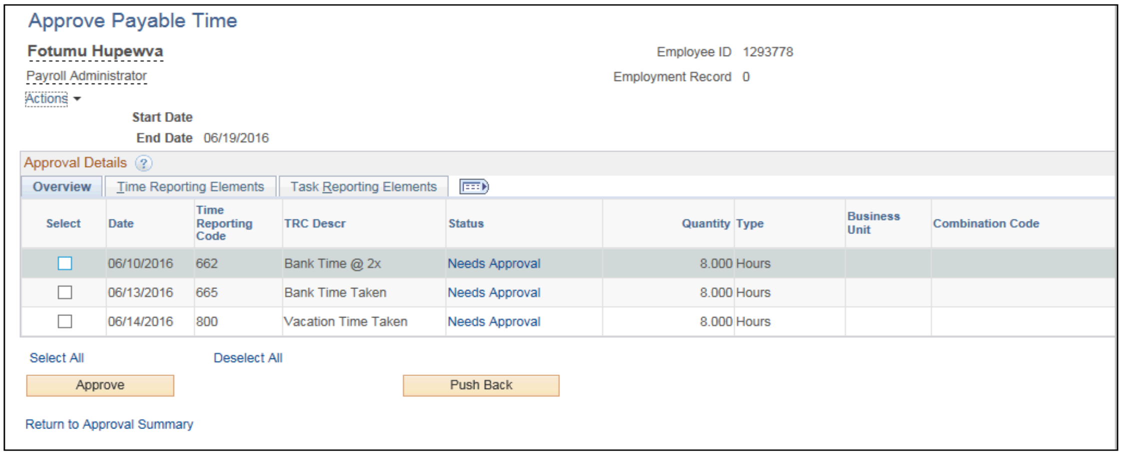
12. Another message will appear confirming your SAVE was successful.

    Click the **OK** button.

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

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.

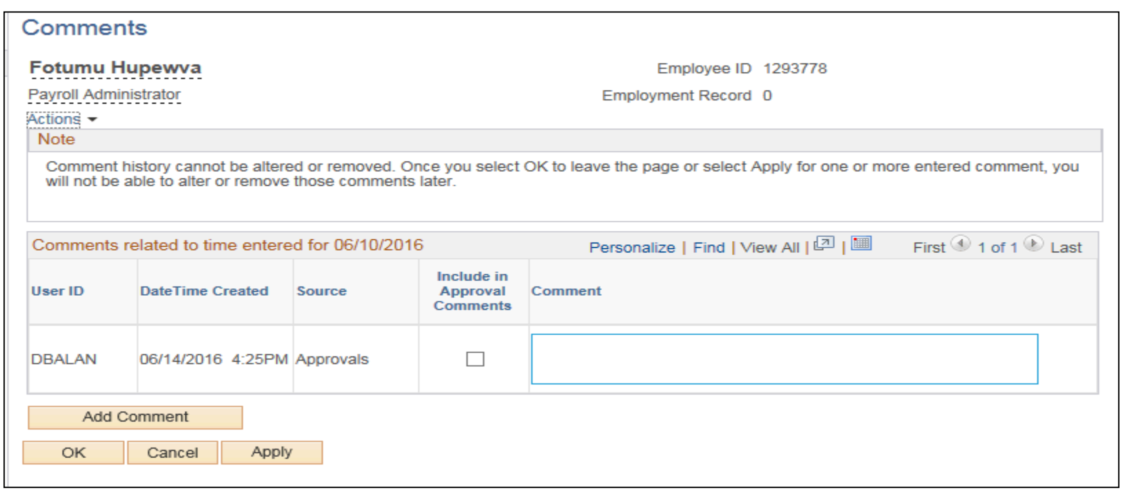


15. Before pushing back the transaction, you need to add a comment describing what needs to be fixed.

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

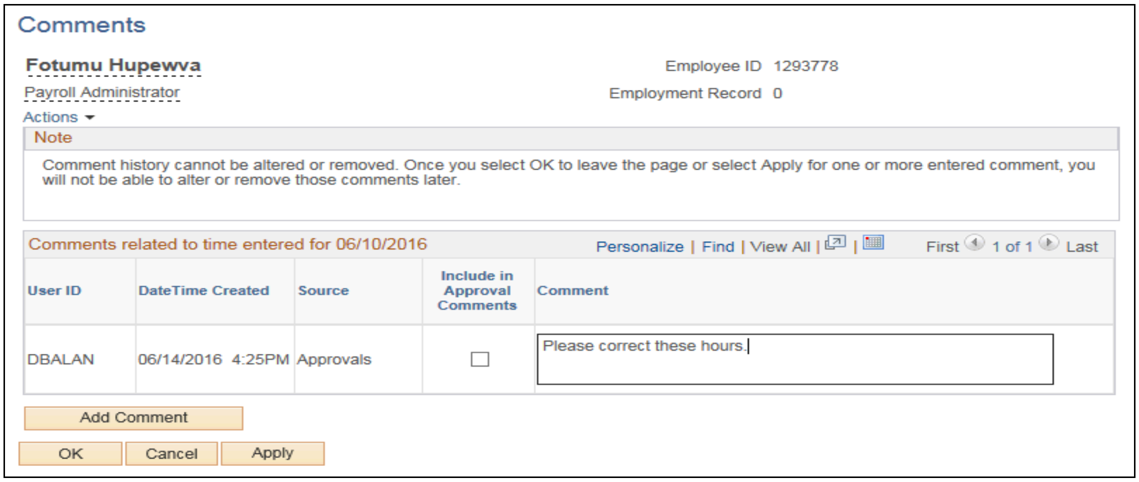
Note: You may need to scroll to the left to see the comments column.

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



17. Enter a comment as required.

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



Comments

Fotumu Hupewva
Payroll Administrator
Actions

Employee ID 1293778
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	☐	Please correct these hours.

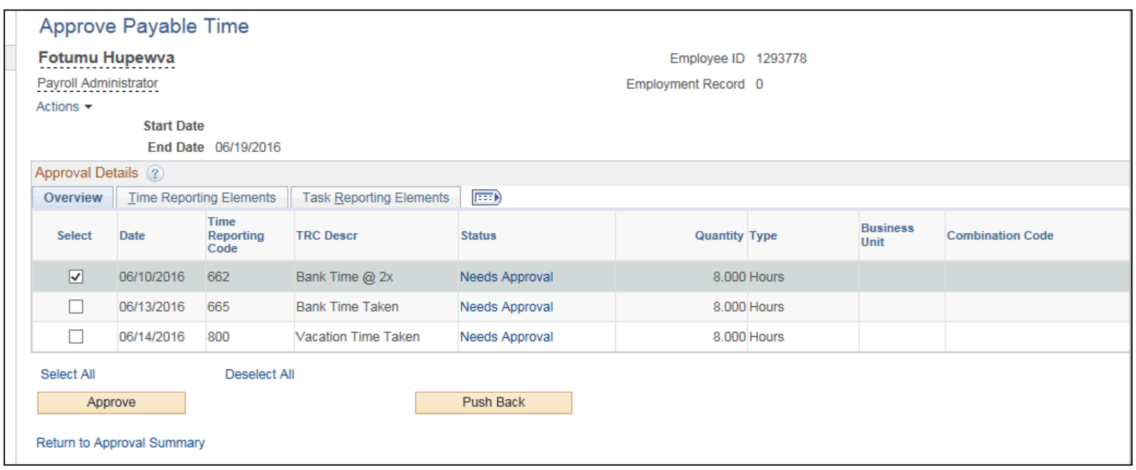
Add Comment

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 Hupewva
Payroll Administrator
Actions

Employee ID 1293778
Employment Record 0

Start Date
End Date 06/19/2016

Approval Details

Overview | Time Reporting Elements | Task Reporting Elements

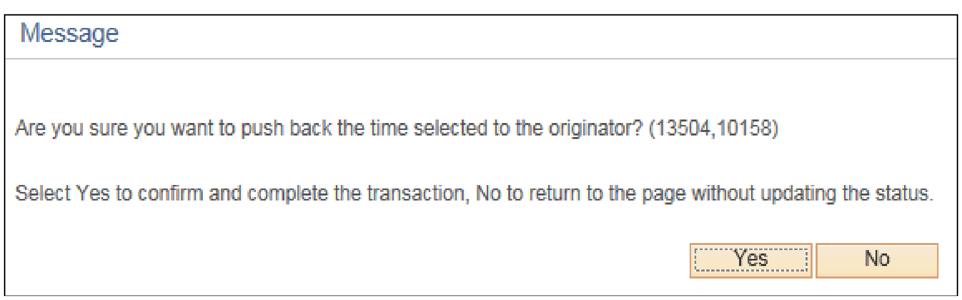
Select	Date	Time Reporting Code	TRC Descr	Status	Quantity	Type	Business Unit	Combination Code
☑	06/10/2016	662	Bank Time @ 2x	Needs Approval	8.000	Hours		
☐	06/13/2016	665	Bank Time Taken	Needs Approval	8.000	Hours		
☐	06/14/2016	800	Vacation Time Taken	Needs Approval	8.000	Hours		

Select All Deselect All

Approve Push Back

Return to Approval Summary

20. Click the **Yes** button.



Message

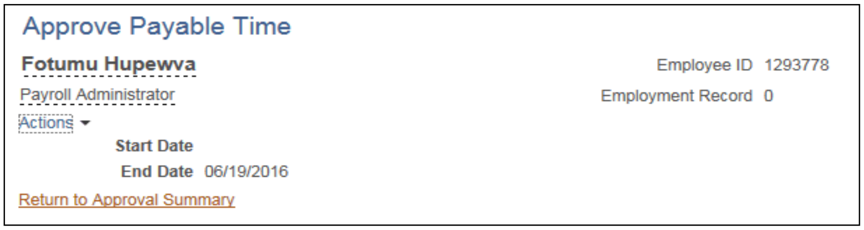
Are you sure you want to push back the time selected to the originator? (13504,10158)

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

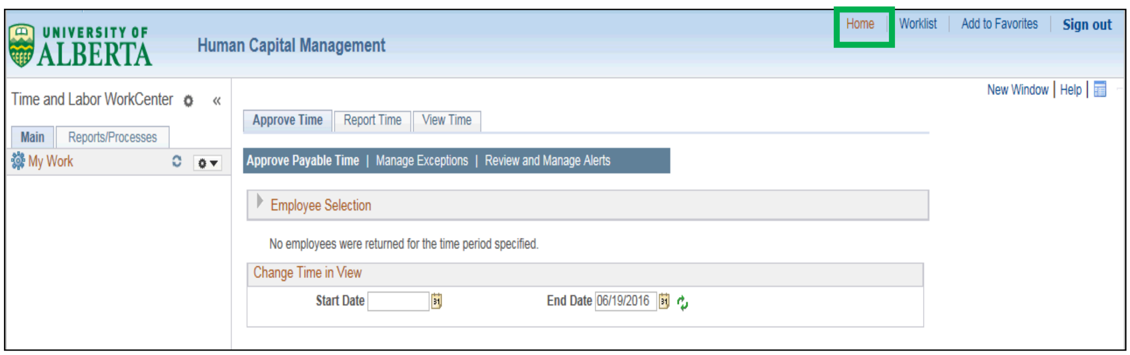
Yes No

21. Click the **OK** button.

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



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



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.

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 Professionsals**, 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.