PEOPLE SOFT 9.2 T.R.A.M. MANAGERS GUIDE

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Overview of Reports-To Manager Role

PeopleSoft uses a **Position Management hierarchy** to define employee–manager relationships based on position data. Each position contains key job-related information such as title, department, location, and **Reports To**. Position information is **static** and remains constant regardless of the employee (incumbent) assigned to the position.

Once a position is established, it is always associated with the designated **Reports To** manager. For example, an *Accountant II* position in Payroll will always report to the *Accounting Manager* position, as defined in Position Management. If the current incumbent leaves and the position is later filled, the new employee is automatically linked to the same Reports To manager.

Because of this structure, time reporters are automatically assigned to their Reports To manager, who is responsible for approving time and leave requests. The system also automatically assigns the required TRAM security roles to managers who have direct reports.

If the Reports To manager is incorrect, the department must submit an **ePRF** to update the position data.

Responsibilities of Role

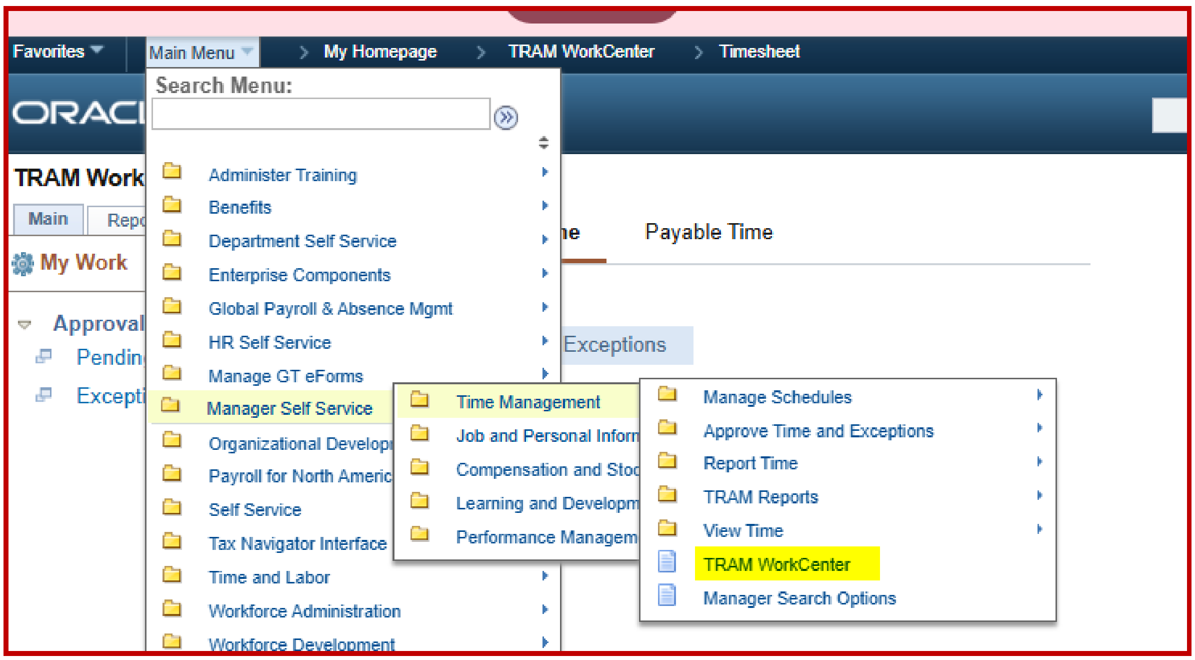
The **Reports To manager** is responsible for completing the following **TRAM functions by noon every Wednesday**. Detailed instructions for each task are provided in this document.

- Making corrections to timesheets for missed or out-of-sequence punches
- Reviewing reports and queries to ensure all time is reviewed and approved
- Managing and resolving exceptions
- Reviewing and approving payable time
- Reviewing and responding to absence requests (approve or deny)
- Managing or updating employee schedules, as needed
- Assigning a delegate to perform these responsibilities during the manager's absence

Tools - Time and Labor Workcenter

The **TRAM WorkCenter** is a one-stop, full-function **command center** that allows managers to access all tasks, reports, and queries needed to complete their TRAM responsibilities. To access the WorkCenter, managers must log into PeopleSoft and use **either of the navigation paths shown below**:

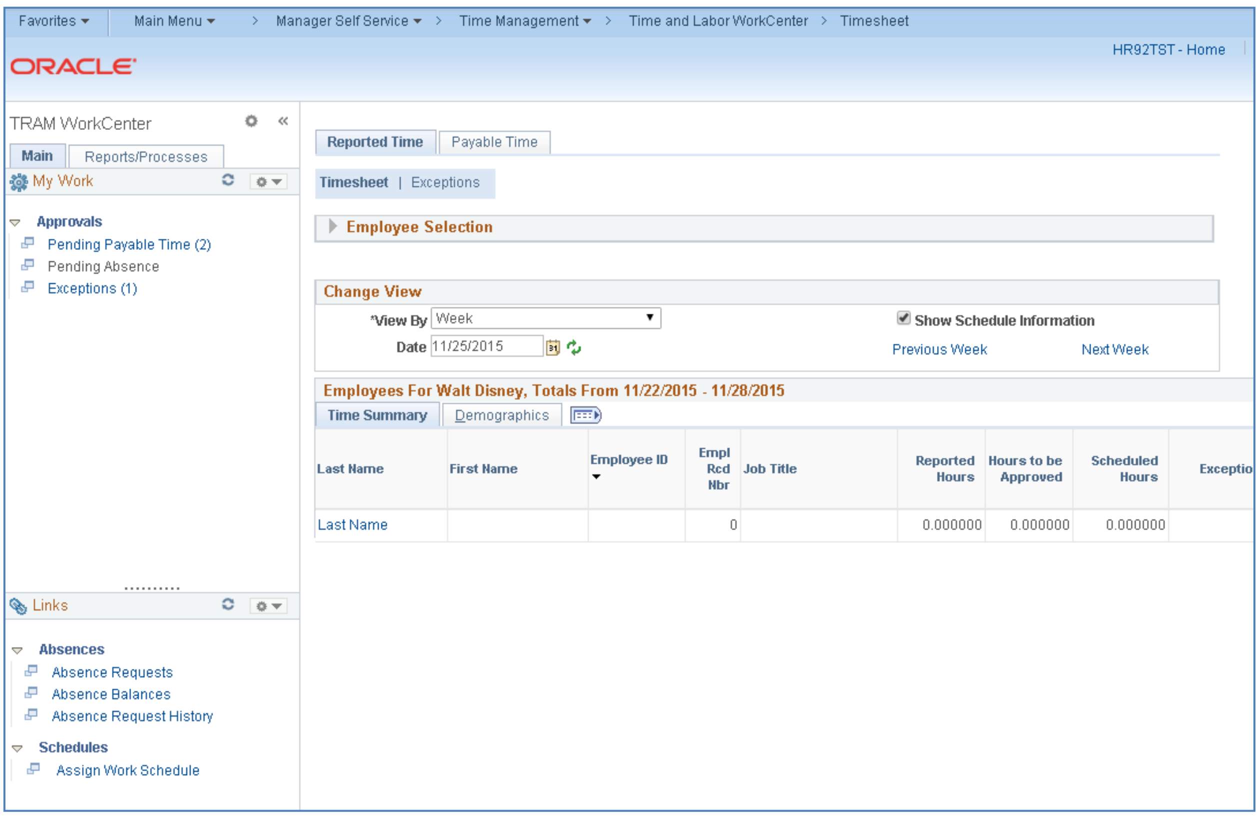
Navigation Path: *Main Menu > Manager Self Service > Time Management > TRAM WorkCenter > Timesheet*



Once the **TRAM WorkCenter** is selected, the **Timesheet Search** page will display. Managers can use the links and tabs in the **left pane** of the WorkCenter to access required approvals, pages, and reports. The **main WorkCenter area** dynamically updates based on the link or function selected in the left pane, allowing users to move between reports and pages without leaving the WorkCenter.

Within the main section, note the available tabs:

- **Reported Time**
- **Payable Time**
- **Timesheet**
- **Exceptions**

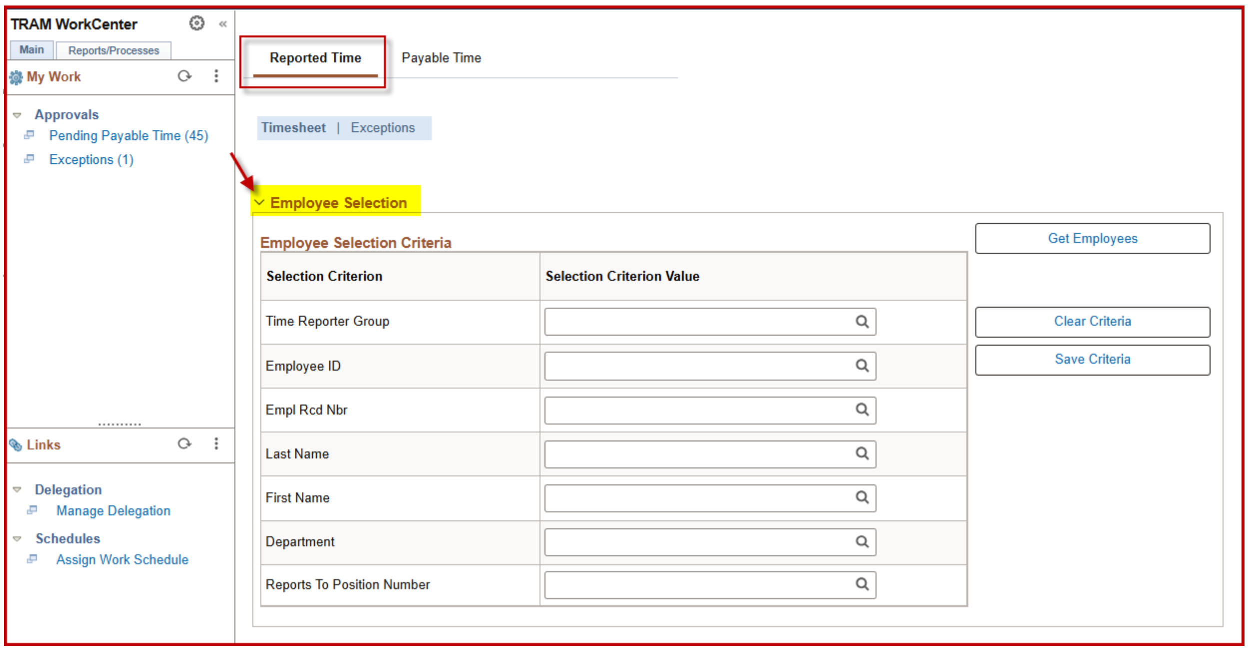


Accessing Reported Time

The **main section of the WorkCenter** defaults to the **Reported Time** tab and displays the **Timesheet** view. The Reported Time section includes employee **Timesheets** and **Exceptions**.

Use the **Employee Selection** search criteria to locate and open employee timesheets. Managers may save their search criteria so they automatically populate each time they access the WorkCenter, or they may manually enter the required information as needed.

To view or modify the search options, click the **arrow next to the Employee Selection header** to expand the search section.



To **save search criteria**, enter the appropriate values under **Selection Criteria**, then click **Save Criteria**. Each time the page is accessed, the saved criteria will automatically populate and retrieve matching employees.

The **Reported Time** page contains two tabs:

- **Timesheet** – Used by managers to review employee punches and verify hours worked
- **Exceptions** – Displays time-related issues requiring review or action

Managers may need to correct a timesheet when an employee misses a punch or is unable to clock in. While employees can view their timesheets through **PASS**, they cannot make changes. For additional information on exceptions, refer to the **Managing Exceptions** section of this document.

The **left pane of the WorkCenter** defaults to a summary view of **pending approvals and exceptions**. Absence requests can also be accessed from this pane. When approvals or exceptions require manager action, the item title appears as a clickable link.

Managers can navigate the TRAM WorkCenter either by selecting links in the left pane or by using the tabs within the main WorkCenter area.

Correcting Timesheets

Managers are authorized to update and correct their employees' timesheets. To comply with **auditing guidelines**, managers must document the **reason for each change or correction** made to an employee's timesheet. These comments cannot be deleted once entered, and are subject to the open records act requests as well as internal or external audit findings.

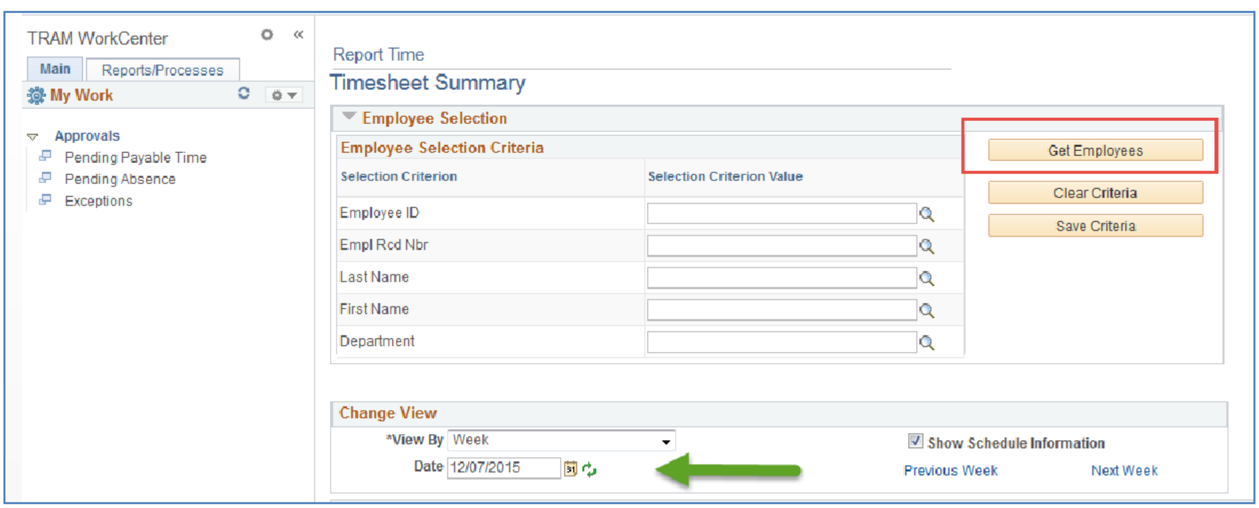
As a standard business practice, managers should update employee timesheets **only in the following circumstances**:

- **Missed punch** – The employee fails to punch in at the start of the workday or after a break/lunch, or fails to punch out when leaving for a break/lunch or at the end of the workday.
- **Out-of-order punches** – Typically occurs when an employee misses a punch and then selects the incorrect punch type.
  Example: An employee clocks in for the day, clocks out for lunch, selects an **Out** punch upon returning from lunch, and later selects an **In** punch when leaving for the day.
- **Leave time adjustment** – The employee submitted an absence request that was approved by the manager but later worked on the scheduled day of absence.

Missed Punch and Out-of-Order Punch

To correct a missed punch or change an out-of-order punch, navigate to the **TRAM WorkCenter** and search for the employee's timesheet.

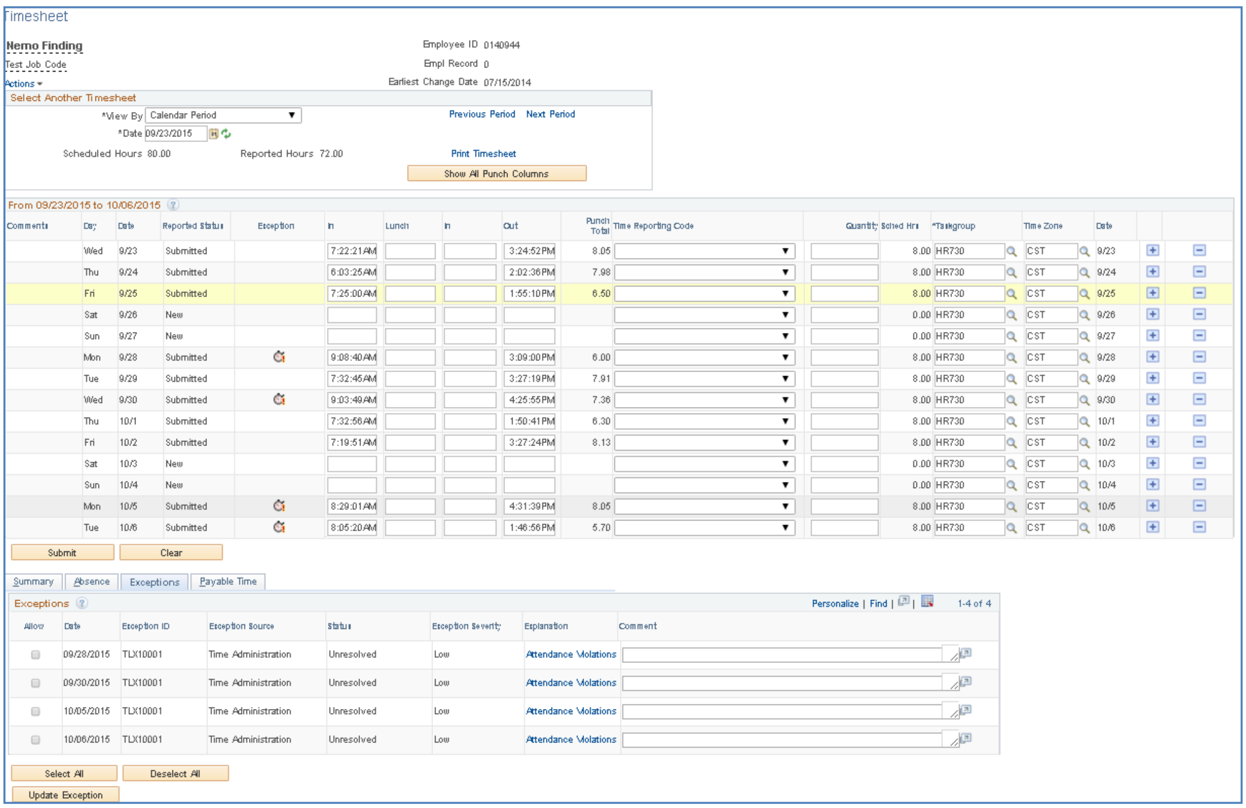
To search, click the **arrow next to the Employee Selection header** to expand the search section. Enter the **Employee ID** or other applicable search criteria, then click **Get Employees**.



The **View By** option can be changed from the default setting to **Week** or **Day**. If the employee was not active for the full calendar period, managers may need to use the **Day** view to retrieve the appropriate dates.

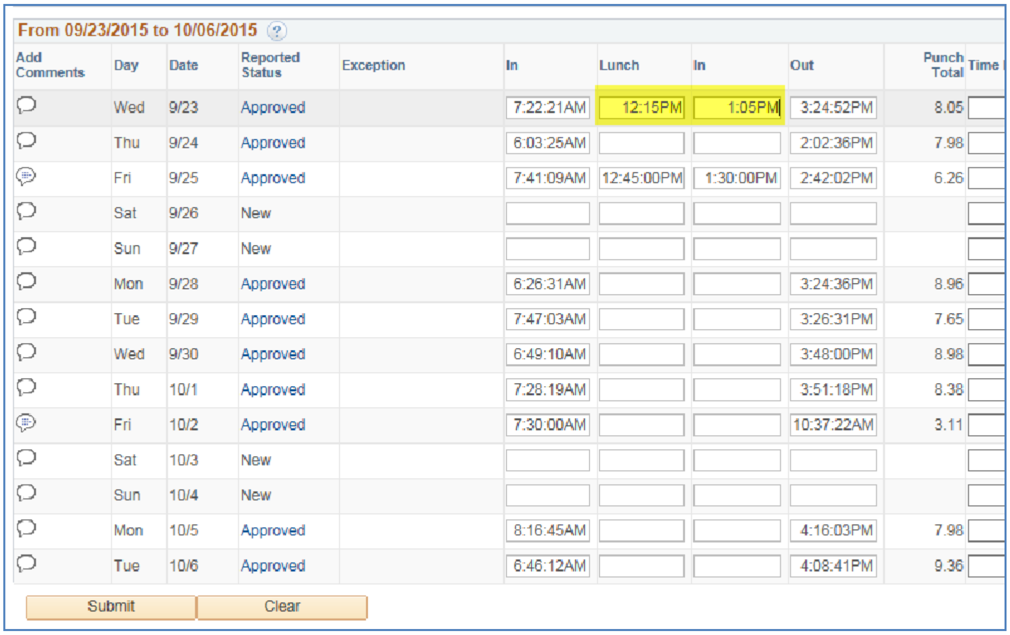
Select the appropriate **employee name link**, and the system will display the timesheet for the specified period.

The timesheet displays **punch times for each day in the pay period**, as well as any **exception indicators**. Exception indicators are generated by a batch process that runs at least once daily. To view a different pay period or select another employee, use the links in the **Select Another Timesheet** section at the top of the page. To search for a specific date, enter the date and click the **green arrows** to refresh the page.



The manager enters any **missed punches** or corrects **out-of-order punches**, adds a **corresponding comment** explaining the change, and then selects **Submit**.

In this example, the manager enters a **lunch break on the first day of the pay period (9/23/15)**.



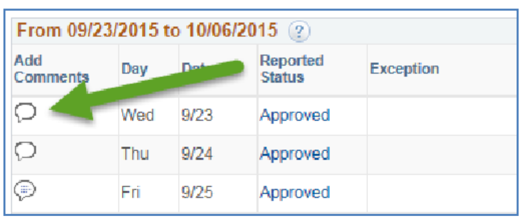
From 09/23/2015 to 10/06/2015

Add Comments	Day	Date	Reported Status	Exception	In	Lunch	In	Out	Punch Total	Time
	Wed	9/23	Approved		7:22:21AM	12:15PM	1:05PM	3:24:52PM	8.05	
	Thu	9/24	Approved		6:03:25AM			2:02:36PM	7.98	
	Fri	9/25	Approved		7:41:09AM	12:45:00PM	1:30:00PM	2:42:02PM	6.26	
	Sat	9/26	New							
	Sun	9/27	New							
	Mon	9/28	Approved		6:26:31AM			3:24:36PM	8.96	
	Tue	9/29	Approved		7:47:03AM			3:26:31PM	7.65	
	Wed	9/30	Approved		6:49:10AM			3:48:00PM	8.98	
	Thu	10/1	Approved		7:28:19AM			3:51:18PM	8.38	
	Fri	10/2	Approved		7:30:00AM			10:37:22AM	3.11	
	Sat	10/3	New							
	Sun	10/4	New							
	Mon	10/5	Approved		8:16:45AM			4:16:03PM	7.98	
	Tue	10/6	Approved		6:46:12AM			4:08:41PM	9.36	

Submit Clear

After entering the punch times, including **AM** or **PM**, a **comment is required**. The system requires a comment for all timesheet changes.

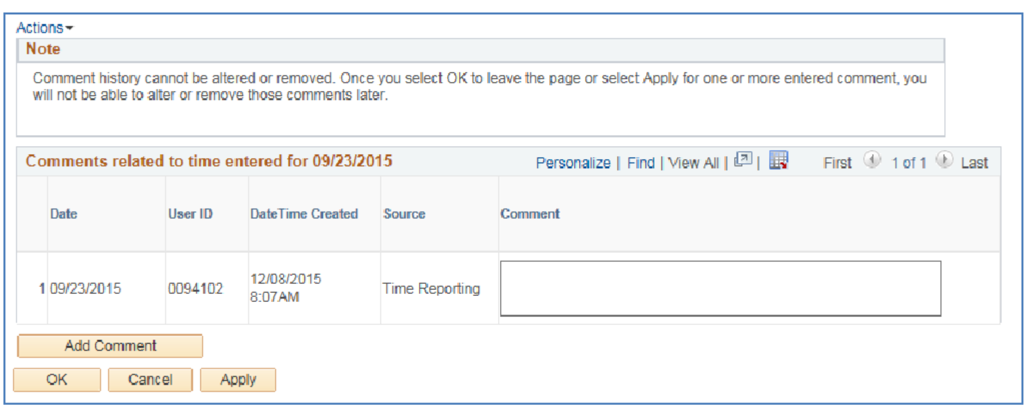
Click the **Add Comments** icon to enter the required comment.



From 09/23/2015 to 10/06/2015

Add Comments	Day	Date	Reported Status	Exception
	Wed	9/23	Approved	
	Thu	9/24	Approved	
	Fri	9/25	Approved	

Enter a description of the change in the **Comment** field. Once complete, click **OK** or **Apply** to return to the timesheet.



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 09/23/2015 — Personalize | Find | View All | First 1 of 1 Last

	Date	User ID	DateTime Created	Source	Comment
1	09/23/2015	0094102	12/08/2015 8:07AM	Time Reporting	

Add Comment

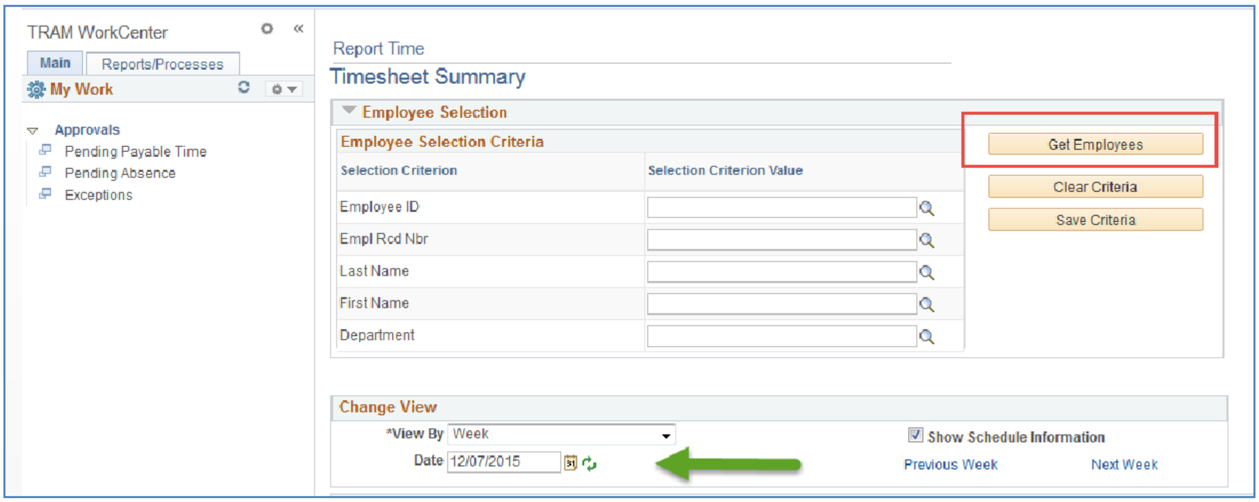
OK Cancel Apply

After the comment is entered, return to the timesheet and click **Submit** to complete the correction. A confirmation page will display; click **OK**. The next time the **Time Administration** process runs, the system will generate **Payable Time** for the adjustment entered. All payable time must be **approved by the manager** in accordance with payroll deadlines.

Adjusting Leave on the Timesheet

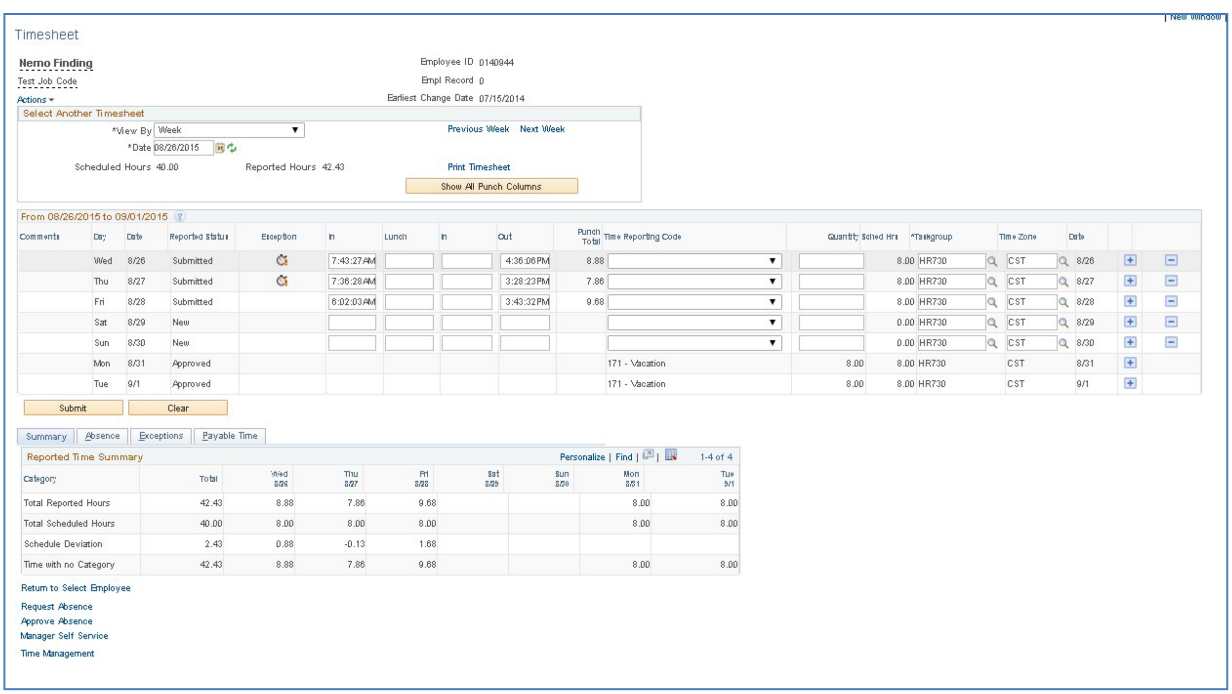
If an employee has an **approved leave request that was not taken**, the manager must adjust the timesheet to return the **unused hours** to the employee. To adjust an employee's leave balance, navigate to the **TRAM WorkCenter** and search for the employee's timesheet.

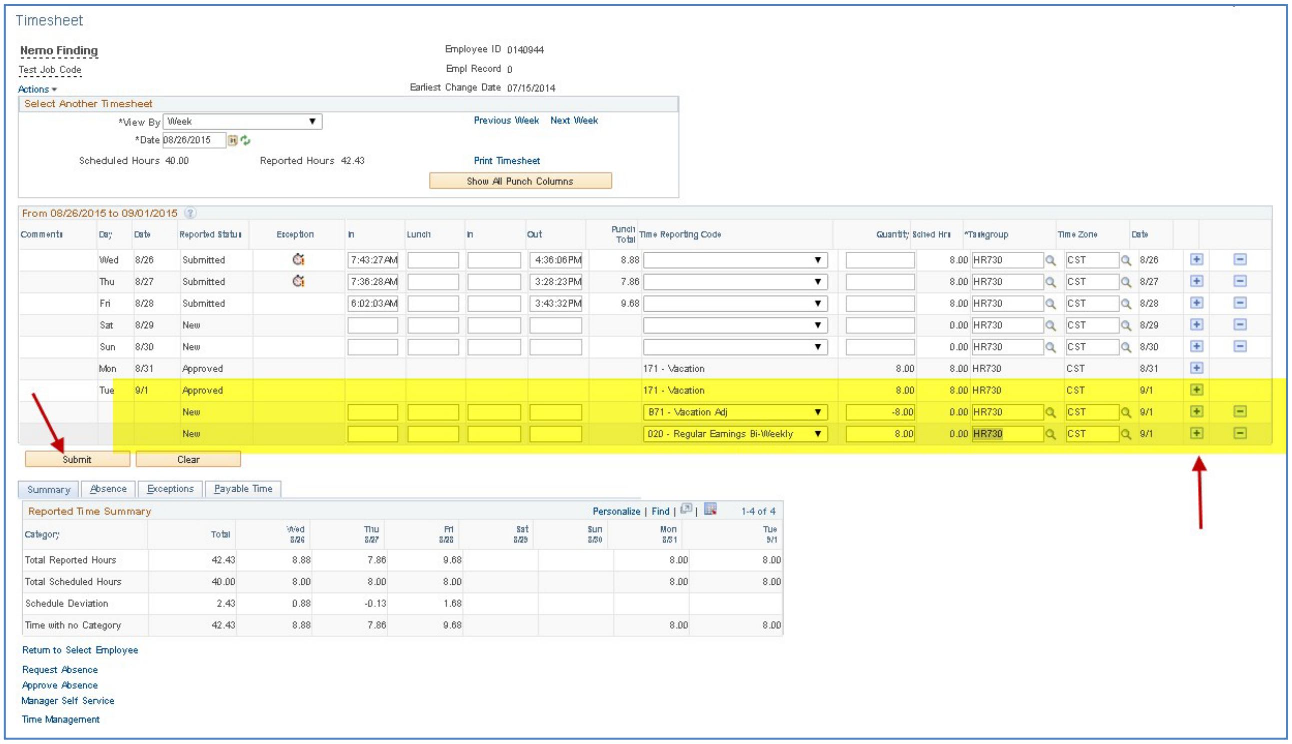
To search, click the **arrow next to the Employee Selection header** to expand the search section. Enter the **Employee ID** or other applicable search criteria, then click **Get Employees**.



Select the appropriate **employee name link**, and the system will display the timesheet for the specified period.

Click the **[+] icon** on the row containing the absence to insert a new row for the adjustment. Select the appropriate **Time Reporting Code (TRC)** and enter a **negative amount** for the leave hours that were approved but not used. **Example:** On Tuesday, **9/1/2015**, the employee worked instead of taking a scheduled vacation day.





On the new row, select the **Vacation Adj** code and enter the adjusted hours (**–8**). A **comment is required** for this timesheet adjustment. Refer to the previous section of this document for instructions on how to enter a comment.

After making the changes, click **Submit**. A confirmation page will display; click **OK** to continue.

The next time the **Time Administration** process runs, the system will generate **Payable Time** for the adjustment entered. All payable time must be **approved by the manager** in accordance with payroll deadlines.

Managing Exceptions

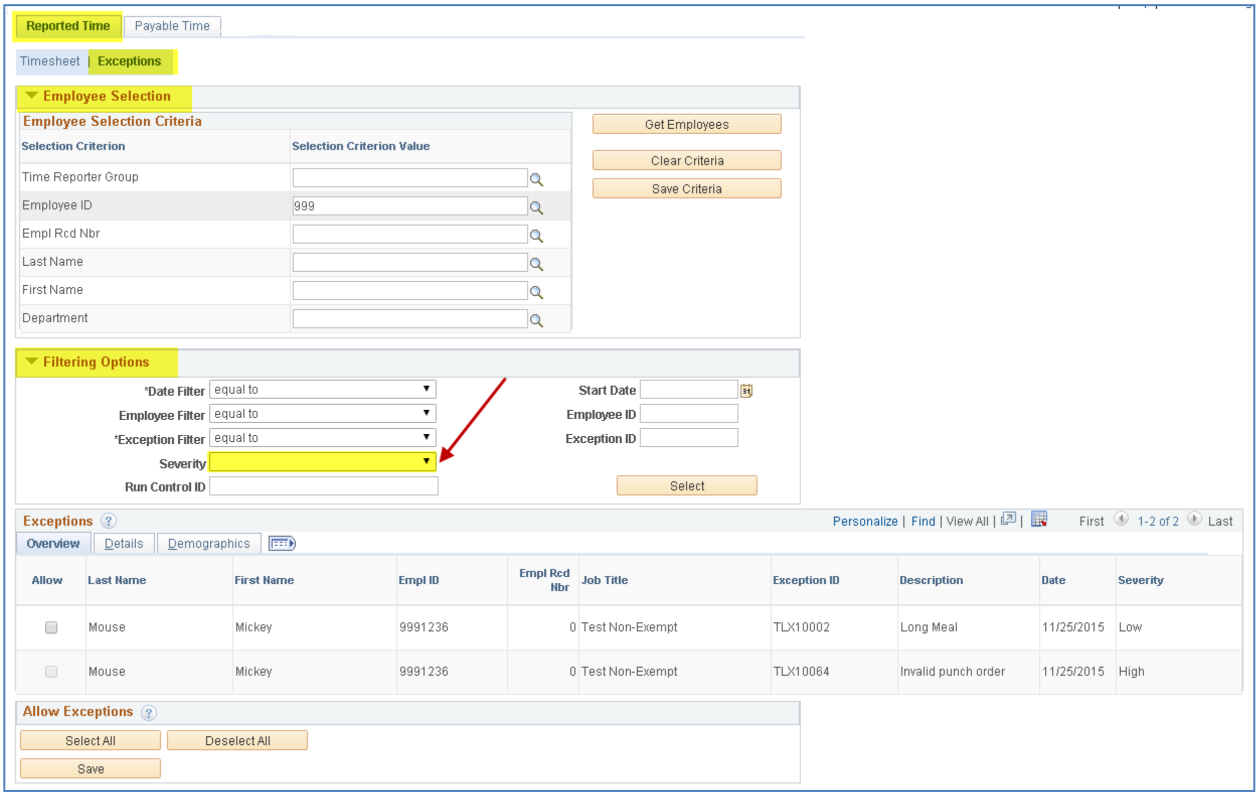
Exceptions are generated each time the **Time Administration** process runs. Exceptions occur when timesheet activity, such as punches, does not comply with the rules defined in the system. TRAM has two types of exceptions: **low severity** and **high severity**.

- **High severity exceptions** require immediate attention and **must be cleared prior to noon every Wednesday**.

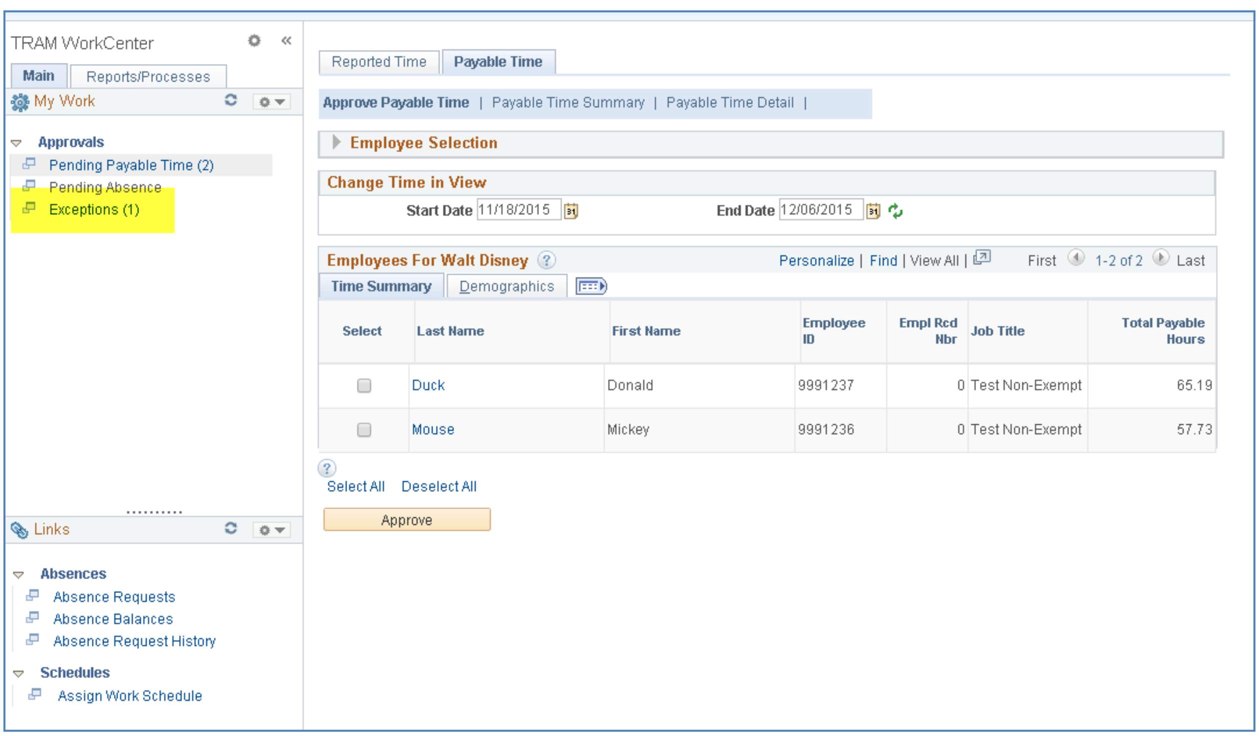
An **Exception alert** displays on the employee's timesheet. To view exception details, managers can either:

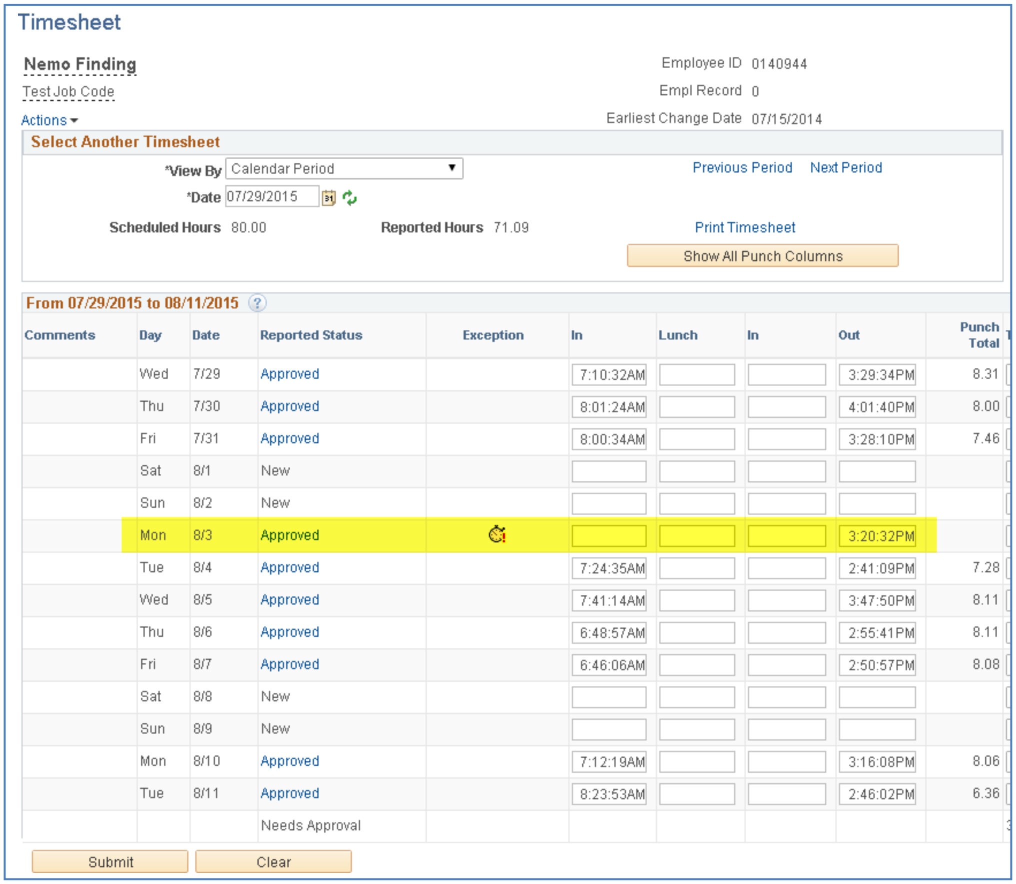
- Click the  on the timesheet, or
- View the **Exceptions tab** at the bottom of the timesheet.

Managers can also search for **all exceptions** associated with their direct reports by selecting the **Exceptions** link on the **TRAM WorkCenter** home page.



Exceptions may also appear under the **Approvals** section of the **WorkCenter**. The link notifies managers of the number of **high-severity exceptions** for their direct reports. Use the **Filter Options** to **display, sort, and prioritize** the exceptions as needed.





Timesheet

Nemo Finding

Test Job Code

Actions

Employee ID 0140944

Empl Record 0

Earliest Change Date 07/15/2014

Select Another Timesheet

*View By Calendar Period

*Date 07/29/2015

Previous Period Next Period

Scheduled Hours 80.00 Reported Hours 71.09

Print Timesheet

Show All Punch Columns

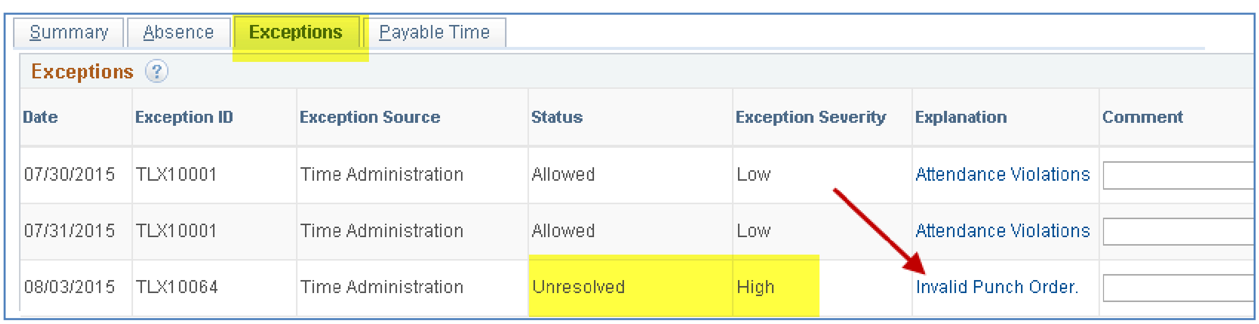
From 07/29/2015 to 08/11/2015

Comments	Day	Date	Reported Status	Exception	In	Lunch	In	Out	Punch Total
	Wed	7/29	Approved		7:10:32AM			3:29:34PM	8.31
	Thu	7/30	Approved		8:01:24AM			4:01:40PM	8.00
	Fri	7/31	Approved		8:00:34AM			3:28:10PM	7.46
	Sat	8/1	New						
	Sun	8/2	New						
	Mon	8/3	Approved					3:20:32PM	
	Tue	8/4	Approved		7:24:35AM			2:41:09PM	7.28
	Wed	8/5	Approved		7:41:14AM			3:47:50PM	8.11
	Thu	8/6	Approved		6:48:57AM			2:55:41PM	8.11
	Fri	8/7	Approved		6:46:06AM			2:50:57PM	8.08
	Sat	8/8	New						
	Sun	8/9	New						
	Mon	8/10	Approved		7:12:19AM			3:16:08PM	8.06
	Tue	8/11	Approved		8:23:53AM			2:46:02PM	6.36
			Needs Approval						

Submit Clear

Exceptions on the timesheet are indicated by the **clock icon**. All **high exceptions** must be corrected directly on the timesheet.

To view a description of an exception, click the **Explanation** link within the **Exceptions** tab at the bottom of the timesheet.



Summary Absence Exceptions Payable Time

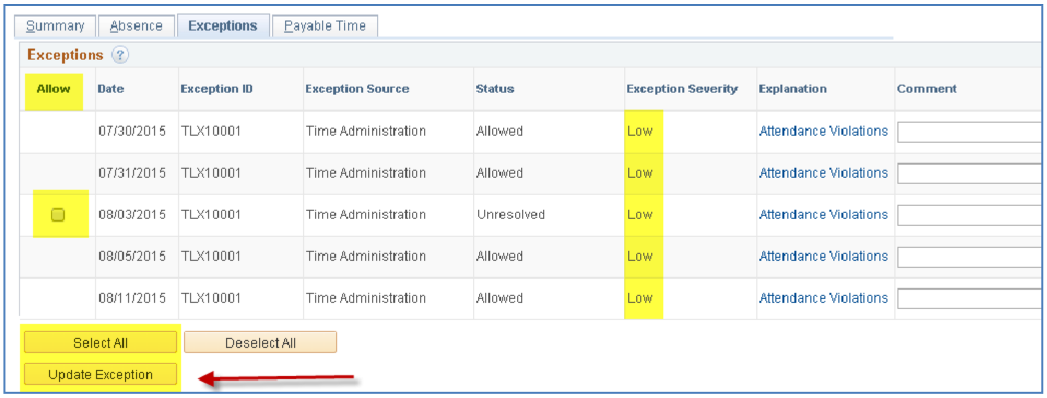
Exceptions

Date	Exception ID	Exception Source	Status	Exception Severity	Explanation	Comment
07/30/2015	TLX10001	Time Administration	Allowed	Low	Attendance Violations	
07/31/2015	TLX10001	Time Administration	Allowed	Low	Attendance Violations	
08/03/2015	TLX10064	Time Administration	Unresolved	High	Invalid Punch Order.	

High exceptions include missed punches and out-of-order punches. Employees **may not be paid** for days with high exceptions. If an employee has a partial absence on a day with a high exception, the system **will not load the absence hours**, and those hours **will not be paid**. It is essential that all high exceptions are **cleared prior to the Payroll process** running the absence calculations on Wednesdays. Refer to the **Correcting Timesheets** section of this document for detailed instructions.

The next time the **Time Administration** process runs, the system will generate **Payable Time** for the corrections entered and will **clear any corrected exceptions**. All payable time must be **approved by the manager** in accordance with payroll deadlines.

Low-priority exceptions can be cleared directly from the timesheet by selecting the checkbox on the exception line and clicking **Update Exception**.



Low priority exceptions include late punches and long lunches. Low priority exceptions do not prevent the employee from being paid.

Accessing and Approving Payable Time

Payable Time is created daily by the Time Administration process. This process captures employees' Reported Time and generates Payable time based on rules defined in the system. This process also creates exceptions when Reported Time is invalid or does not meet the defined rules. Reported Time does not require approval, but Payable Time must be approved for the employee to be paid.

The **Payable Time** tab can be used by the manager to review and approve all pending Payable Time. Payable Time can be accessed by clicking the Payable Time tab in the main section of the WorkCenter, or by selecting the hyperlinks in the left pane. The Payable Time section consists of Approve Payable Time, Payable Time Summary, and Payable Time Detail.

Approve Payable Time displays current employees that report to the manager and have pending payable time during the specified date range. To view a different date range, enter the new dates and click the green arrows to refresh the results.

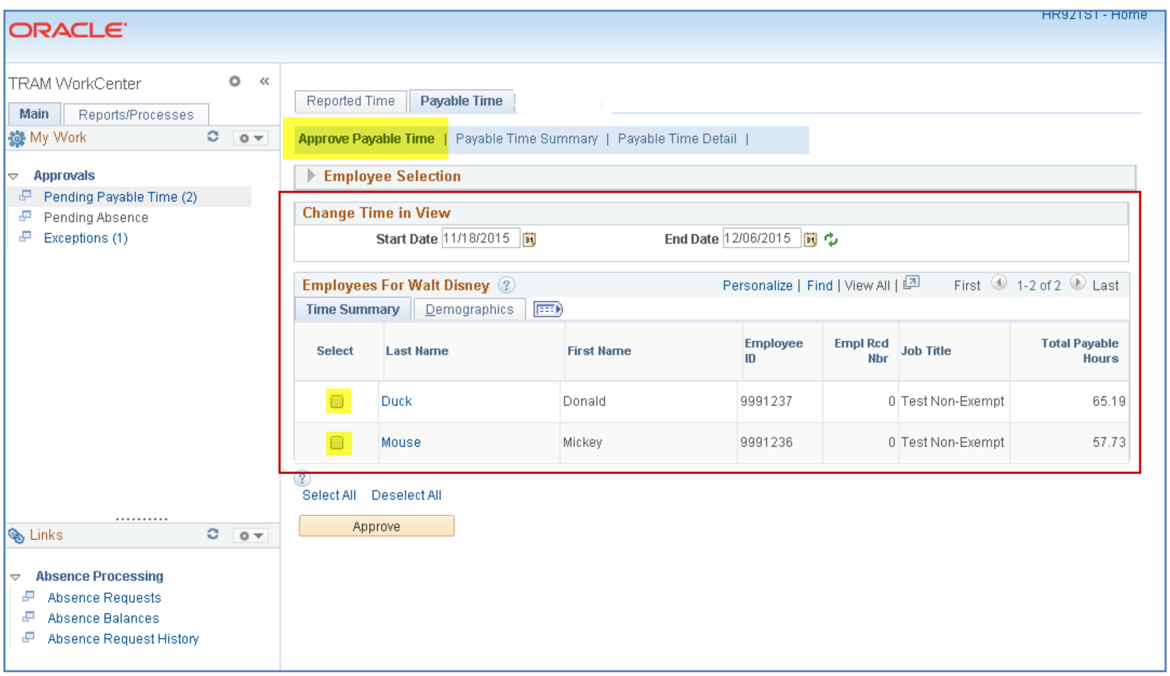
The grid displays the **Total Payable Hours** requiring approval for the employees. To view date specific details associated to the payable time, click the employee name link. The system will then display each day within the date range that has time in **Needs Approval** status.

Managers can approve an individual employee's time or approve all employees at once. To approve the total payable hours, click the **Select** checkbox and the "Approve" button. You can select the full list of employees quickly by clicking the **Select All** link below the grid.

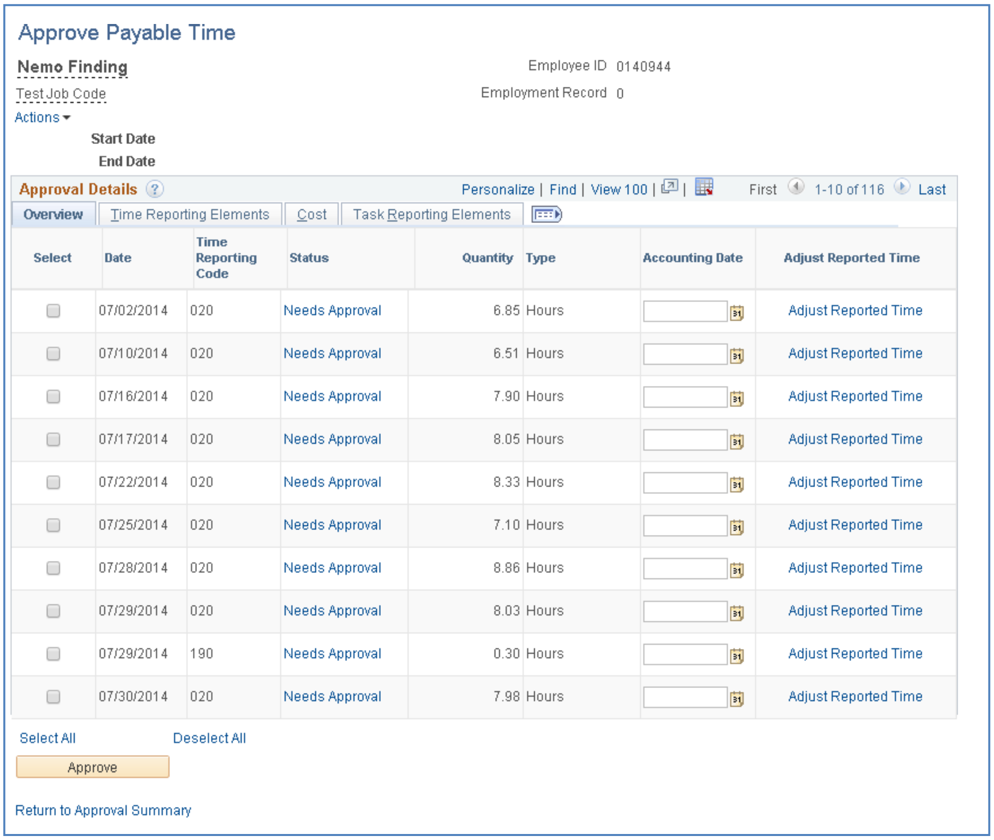
If changes are made to an employee's timesheet after it was initially approved, there may be negative Payable Time to adjust previously approved hours. For example, if the employee reaches the weekly overtime limit, there may be reversals to move hours from Reg earnings to Comp or Overtime earnings. You may also see an adjustment if leave requests are approved and loaded after the initial time period was approved. These adjustments ensure the employee is paid from the correct earnings code. The adjustments display when the manager views the daily payable hours. (They do not display on the Summary page in the screen shot below.)

Select the **Demographics** tab to view additional details, such as department, workgroup, location, position number, and reports-to information.

In this example, the manager has 2 Payable Time records awaiting approval. The manager can approve directly from this page (total Payable Hours display) or drill down to view the hours broken down by date.



The page below displays when the manager clicks on the employee name link. Individual dates can be approved, or the manager can approve all payable time for the employee. To launch the timesheet and review punches, click the **Adjust Reported Time** link.



Approve Payable Time

Nemo Finding — Employee ID 0140944

Test Job Code — Employment Record 0

Actions

Start Date

End Date

Approval Details — Personalize | Find | View 100 | First 1-10 of 116 Last

Overview | Time Reporting Elements | Cost | Task Reporting Elements

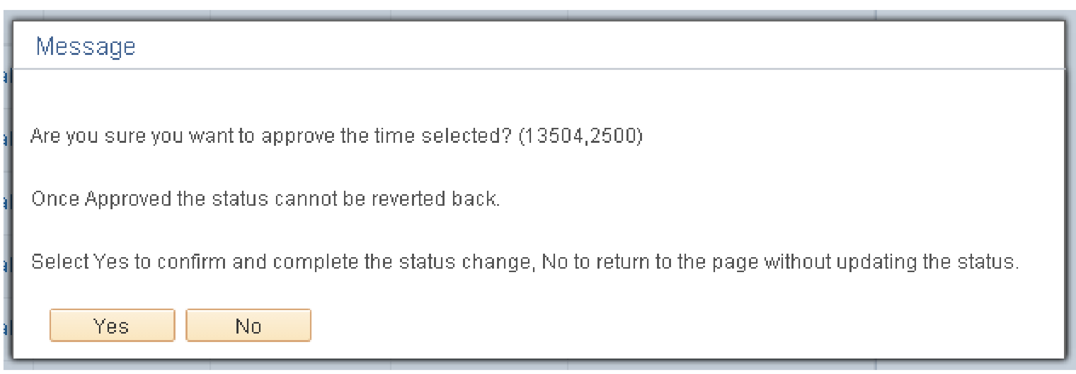
Select	Date	Time Reporting Code	Status	Quantity	Type	Accounting Date	Adjust Reported Time
	07/02/2014	020	Needs Approval	6.85	Hours		Adjust Reported Time
	07/10/2014	020	Needs Approval	6.51	Hours		Adjust Reported Time
	07/16/2014	020	Needs Approval	7.90	Hours		Adjust Reported Time
	07/17/2014	020	Needs Approval	8.05	Hours		Adjust Reported Time
	07/22/2014	020	Needs Approval	8.33	Hours		Adjust Reported Time
	07/25/2014	020	Needs Approval	7.10	Hours		Adjust Reported Time
	07/28/2014	020	Needs Approval	8.86	Hours		Adjust Reported Time
	07/29/2014	020	Needs Approval	8.03	Hours		Adjust Reported Time
	07/29/2014	190	Needs Approval	0.30	Hours		Adjust Reported Time
	07/30/2014	020	Needs Approval	7.98	Hours		Adjust Reported Time

Select All — Deselect All

Approve

Return to Approval Summary

When approving Payable Time, you will be prompted with the following confirmation.

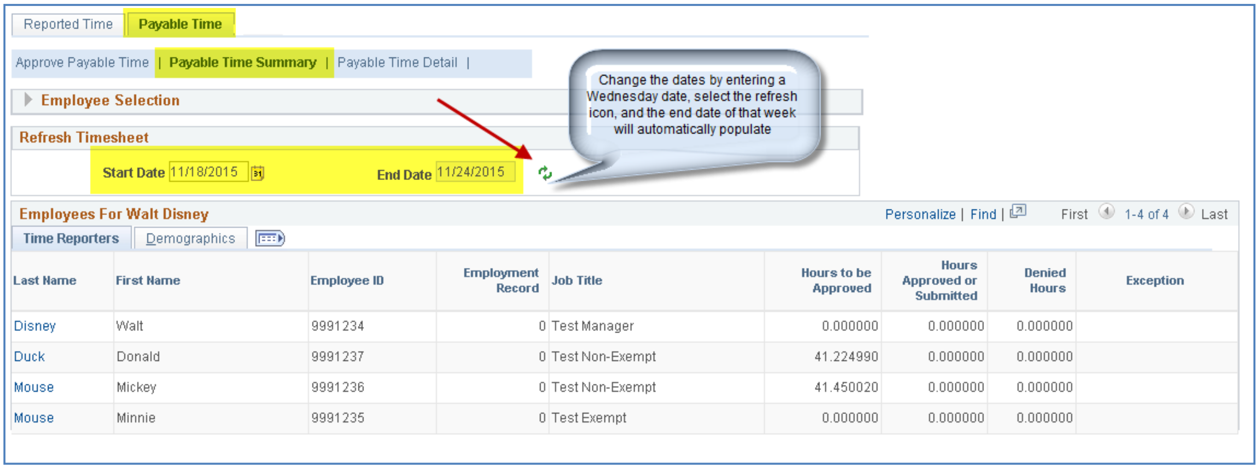


Once Payable Time is approved, it cannot be denied or changed. If changes are necessary, they must be made directly on the employee's timesheet. The changes will be processed through the daily Time Administration batch process, and the system will generate new Payable Time that must be approved.

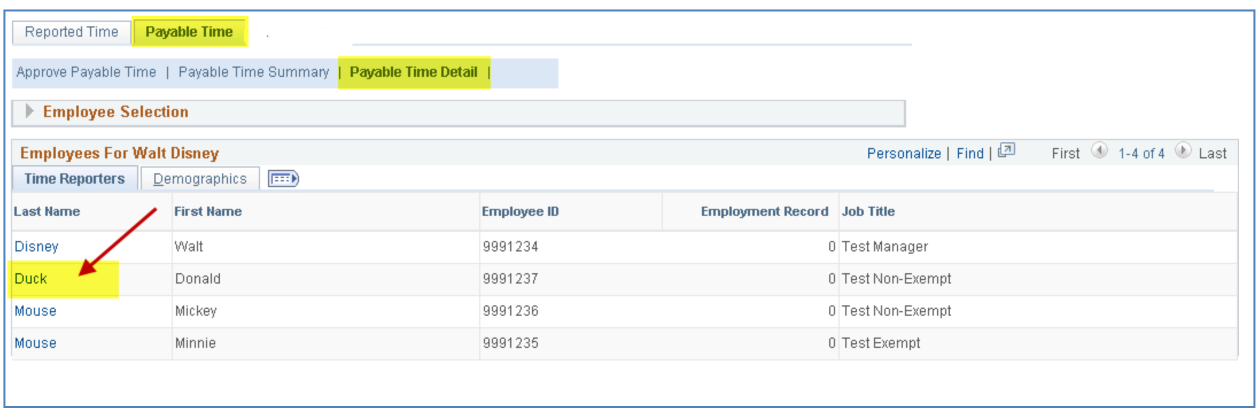
The **Payable Time Summary** tab allows managers to view summarized Payable Time information for a group of employees. Click the arrow next to the **Employee Selection** section to modify the group of employees displayed in the grid. To view a different date range, enter the new dates and click the **green arrows** to refresh the results.

The system displays summarized **Hours to be Approved**, **Approved** hours, and any exception alerts. To view employee specific details, click the employee's name link.

Select the **Demographics** tab to view additional details, such as department, workgroup, location, position number, and reports-to information.

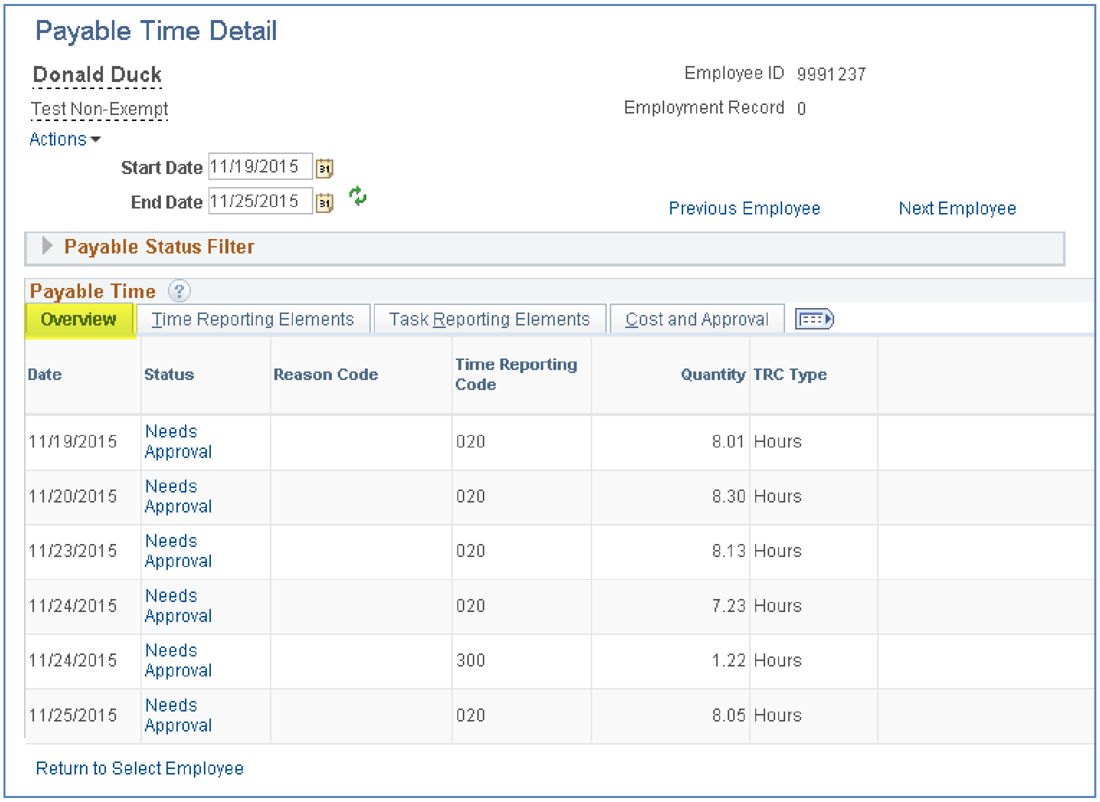


The **Payable Time Detail** tab allows managers to view detailed information associated to an employee's time. To access the details, click the link associated to the employee's name.



The Payable Time Detail page displays information for the selected employee. To view a different date range, enter the new dates and click the **green arrows** to refresh the results. The system displays the employee's **Time Reporting Code** (TRC), quantity and status.

If changes are made to an employee's timesheet after initial approval, reversals may occur to remove previously approved hours. If the employee reaches the weekly overtime limit, adjustments may be made to move hours from Reg earnings to Comp or Overtime earnings.



Payable Time Detail

Donald Duck

Test Non-Exempt

Actions

Employee ID 9991237

Employment Record 0

Start Date 11/19/2015

End Date 11/25/2015

Previous Employee   Next Employee

Payable Status Filter

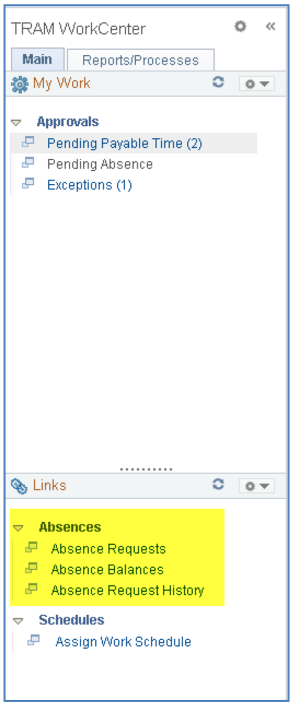
Payable Time

Overview | Time Reporting Elements | Task Reporting Elements | Cost and Approval

Date	Status	Reason Code	Time Reporting Code	Quantity	TRC Type
11/19/2015	Needs Approval		020	8.01	Hours
11/20/2015	Needs Approval		020	8.30	Hours
11/23/2015	Needs Approval		020	8.13	Hours
11/24/2015	Needs Approval		020	7.23	Hours
11/24/2015	Needs Approval		300	1.22	Hours
11/25/2015	Needs Approval		020	8.05	Hours

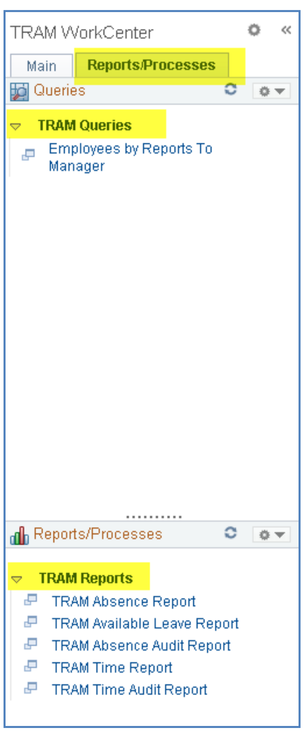
Return to Select Employee

Accessing Other Links in the WorkCenter



The left pane also contains useful links to review Absence Requests, Absence Balances, Absence Request history, and Work Schedules for the manager's direct reports.

Schedules can be changed from the default to Select Predefined Schedule by selecting the appropriate hyperlink. As you will see later in this guide, schedules for monthly-paid employees should be changed effective the first day of a new month, and changes for hourly-paid employees should be changed effective the first working day (always a Wednesday) of a new biweekly pay period.



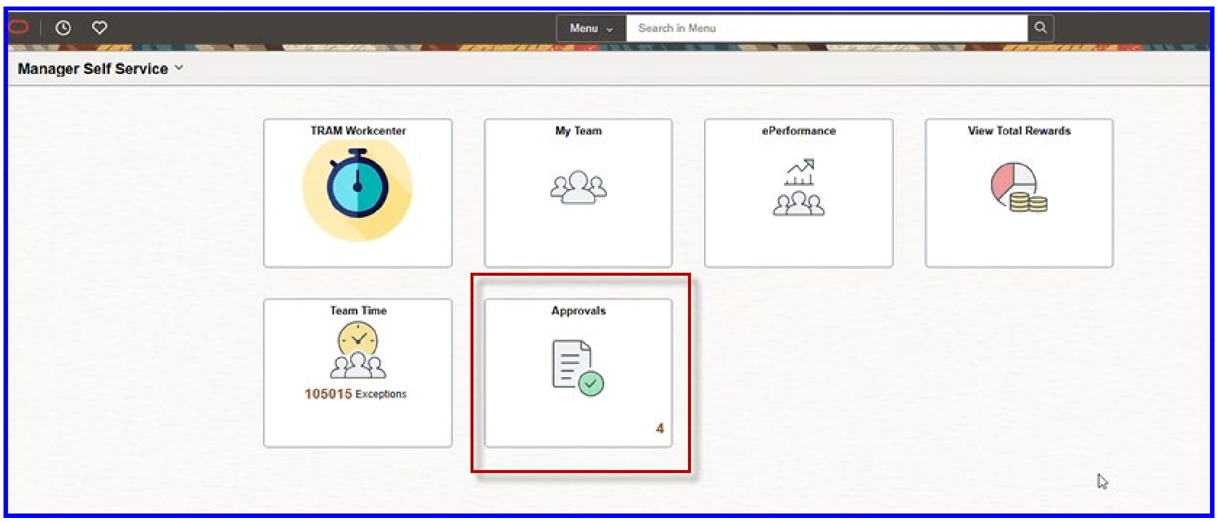
The left pane contains the Report/Processes tab. This tab displays popular TRAM queries and reports. These reports and queries should be used when validating payroll data throughout the pay cycle.

Absence Requests

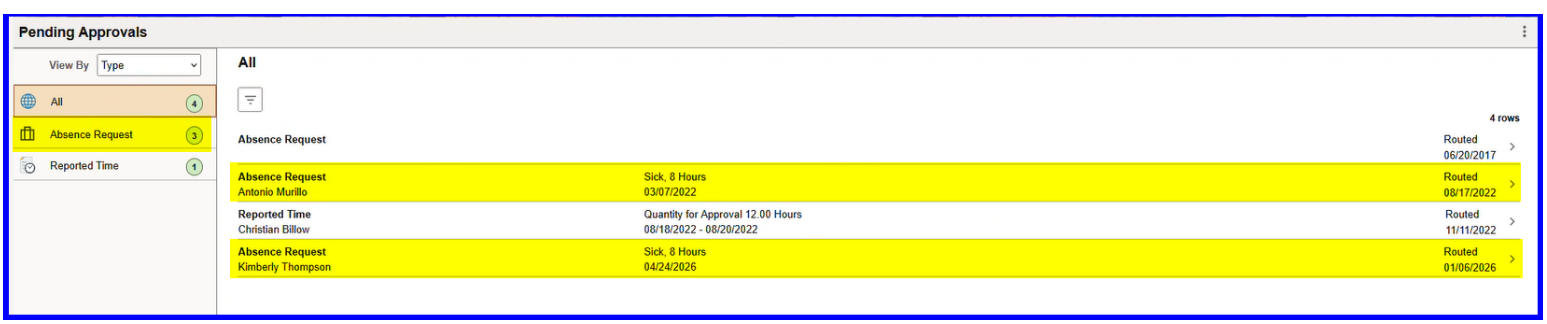
Approving/Denying Requests

Absences are submitted via PASS and are routed to the Reports To manager for processing. All benefits-eligible employees (hourly-paid staff and monthly-paid staff and faculty) can submit leave requests. Non-benefits eligible employees who accrue compensatory time may also submit leave requests. Managers can submit a leave request on behalf of an employee, if the employee is unable to access the system.

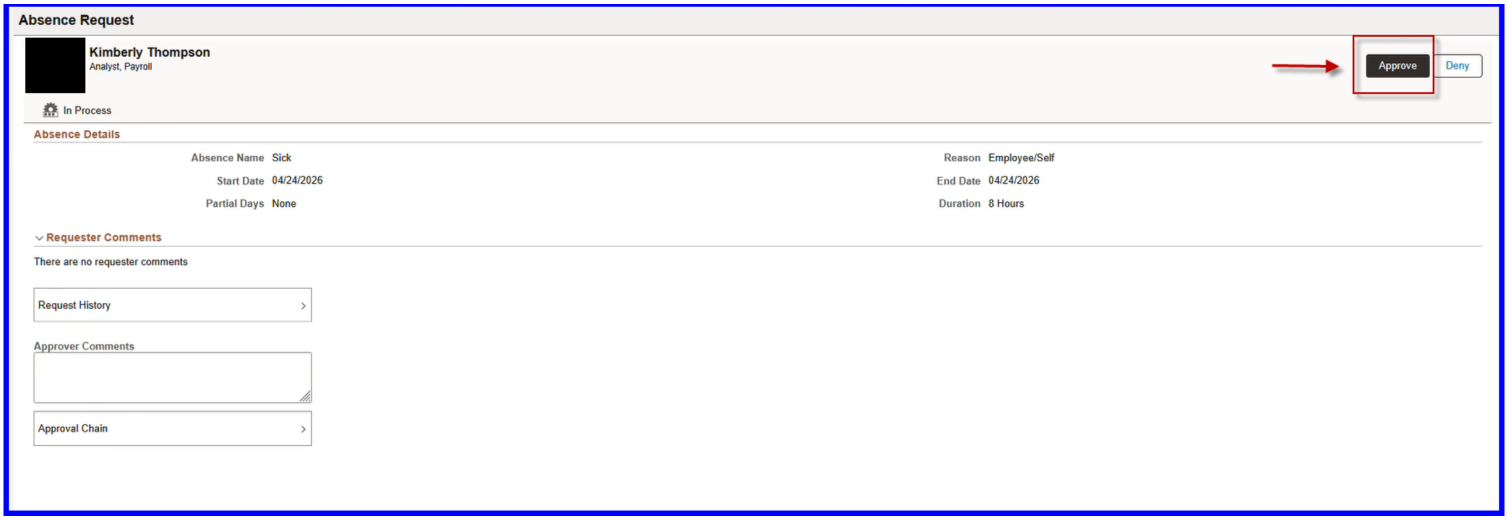
Managers can access pending absences through the **Manager Self Service**. Select the **Approvals** Section.



PeopleSoft defaults to displaying pending requests. To approve a pending leave request, click the **Absence Requests** pane on the right, or click on the **employee's name** to review the leave request and take action.



The system displays the dates the employee has requested off, the total hours and type of leave requested, and the current and projected leave balance as of the date requested. The manager has the following options to respond to the request:

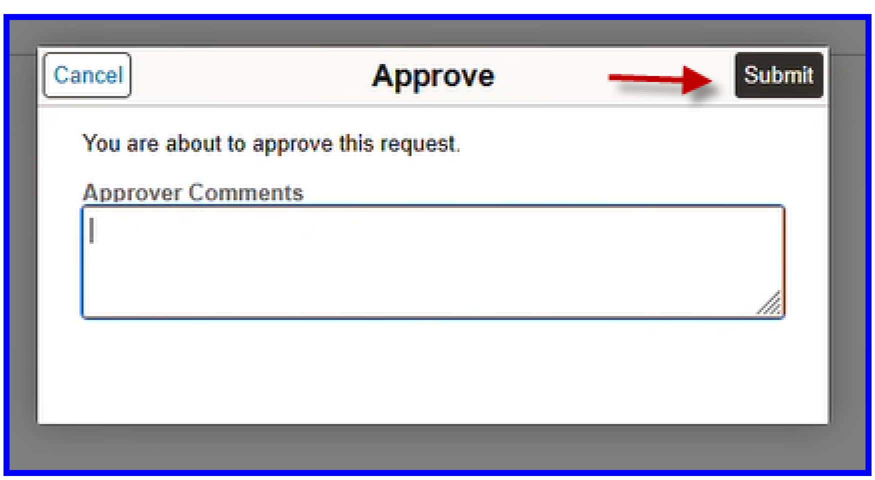


- **Approve** – only one approval is required, and once approved, there is no other action for the manager to take unless the employee does not take the day off.
- **Deny** – sends request back to the employee as unapproved. The employee has the ability to edit the denied request at the recommendation of the Report to Manager.

From this page, the manager can also:

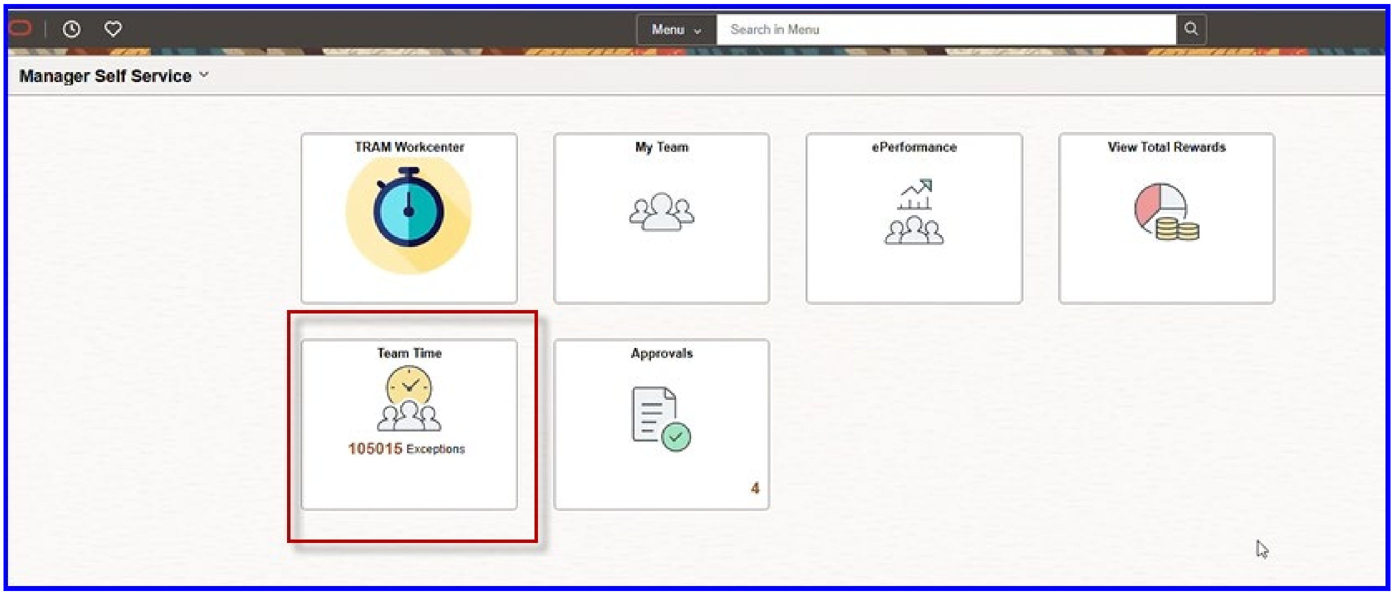
- View absence request history
- View monthly schedule
- View absence balances
- Attach a document to the request (i.e doctor's excuse, jury duty, etc.)
- Return to absence requests to select another employee's request

If the manager approves the request, the system displays a **Submit** page. The manager can add comments on this page and then click **Submit**.

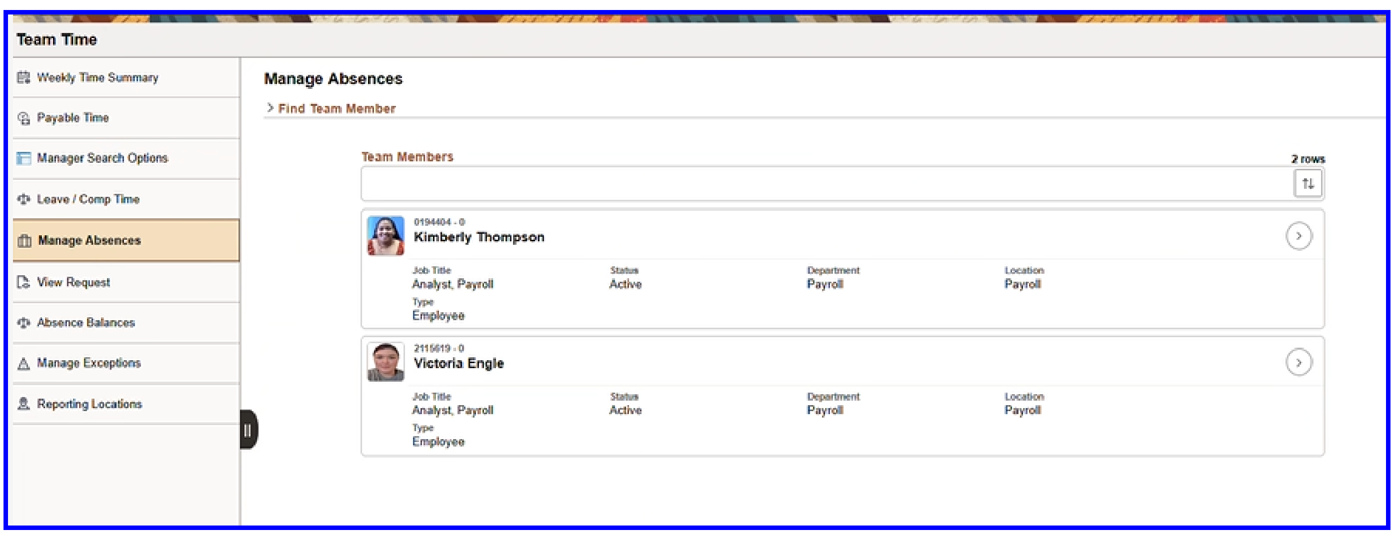


Submit Absence for an Employee

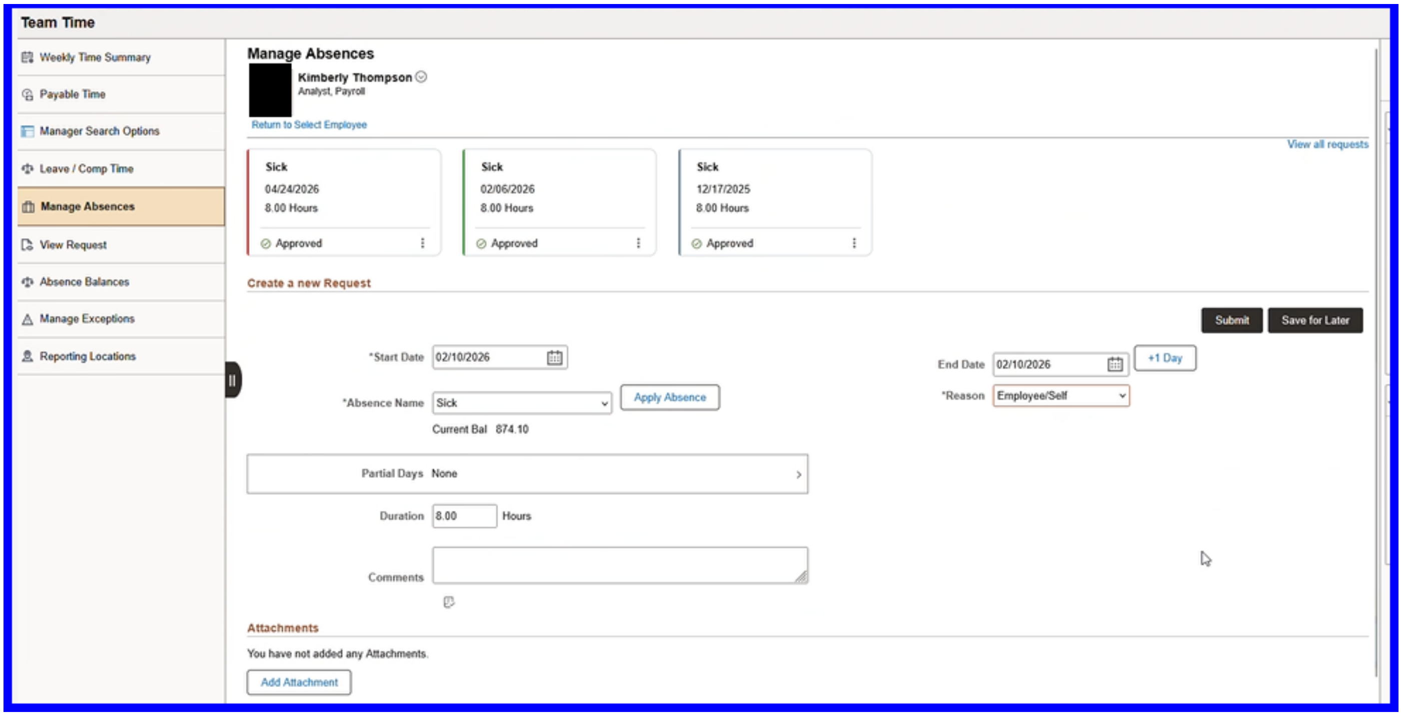
If an employee is unable to submit an absence request, the manager may enter the request on the employee's behalf. To do this, the manager should navigate to **Manager Self Service** and select the **Team Time** section to access and manage pending absences.

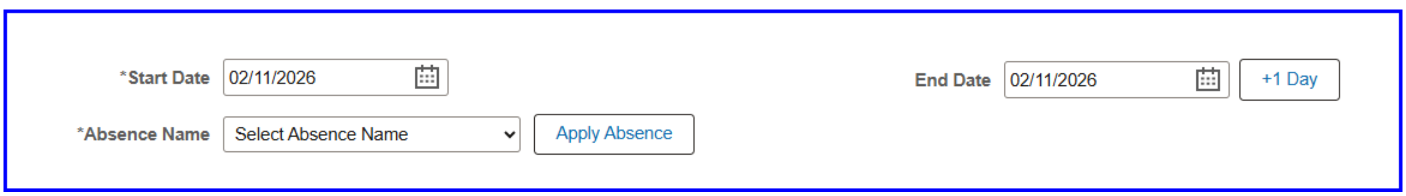


A Team Time list displays in the left pane. The manager should click **Manage Absences**, then select the employee for whom they are creating the absence request.

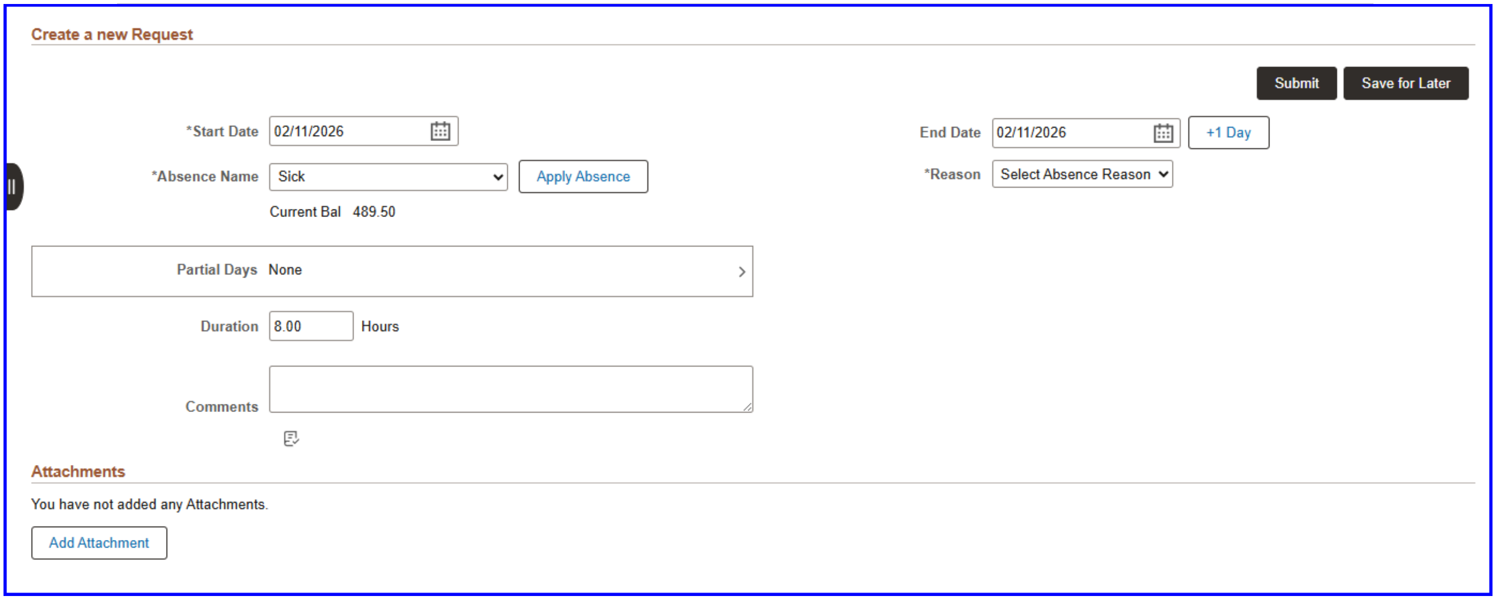


Once the employee is selected, the system displays the **Request Absence** page. Enter the **Start Date**. For the **Absence Name**, click the drop-down arrow to select the appropriate leave type, then click **Apply Absence**.

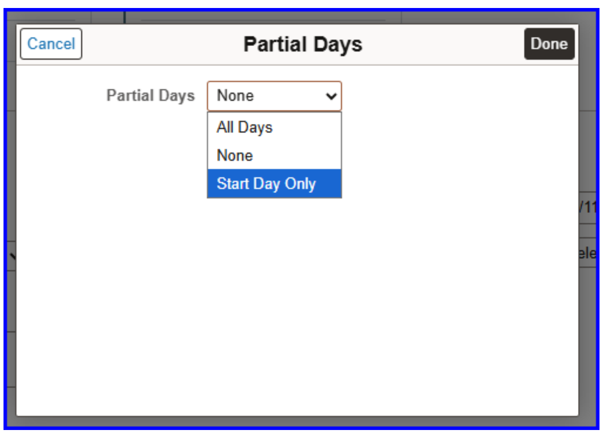


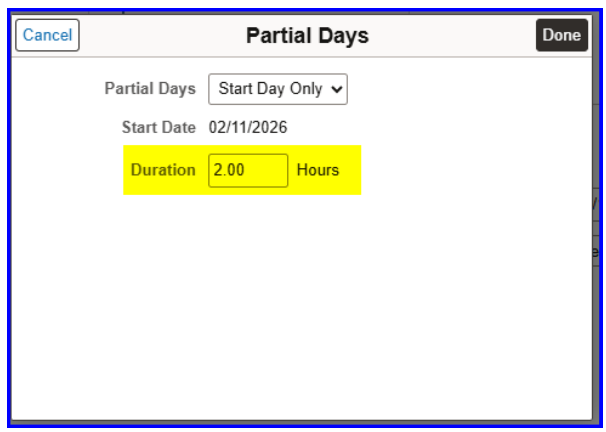


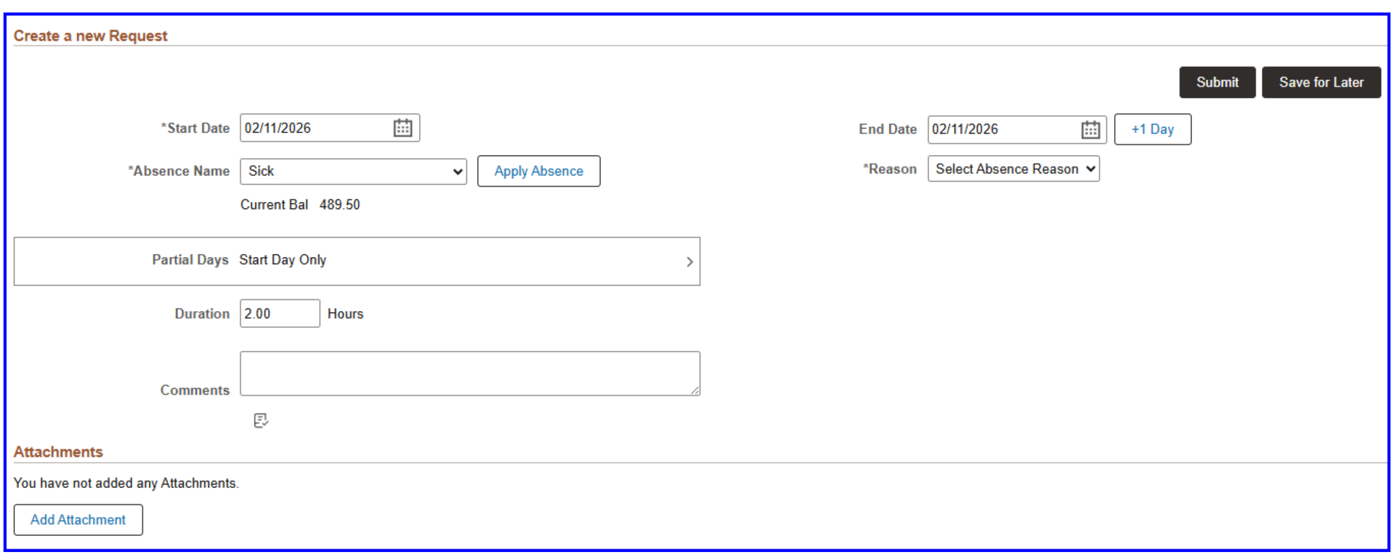
The fields for ***Partial Days, Duration, Comments, Reason*** (if required for certain leave types), and ***Attachments*** will populate. If the leave is for a partial day, click **Partial Days** to enter the appropriate details.



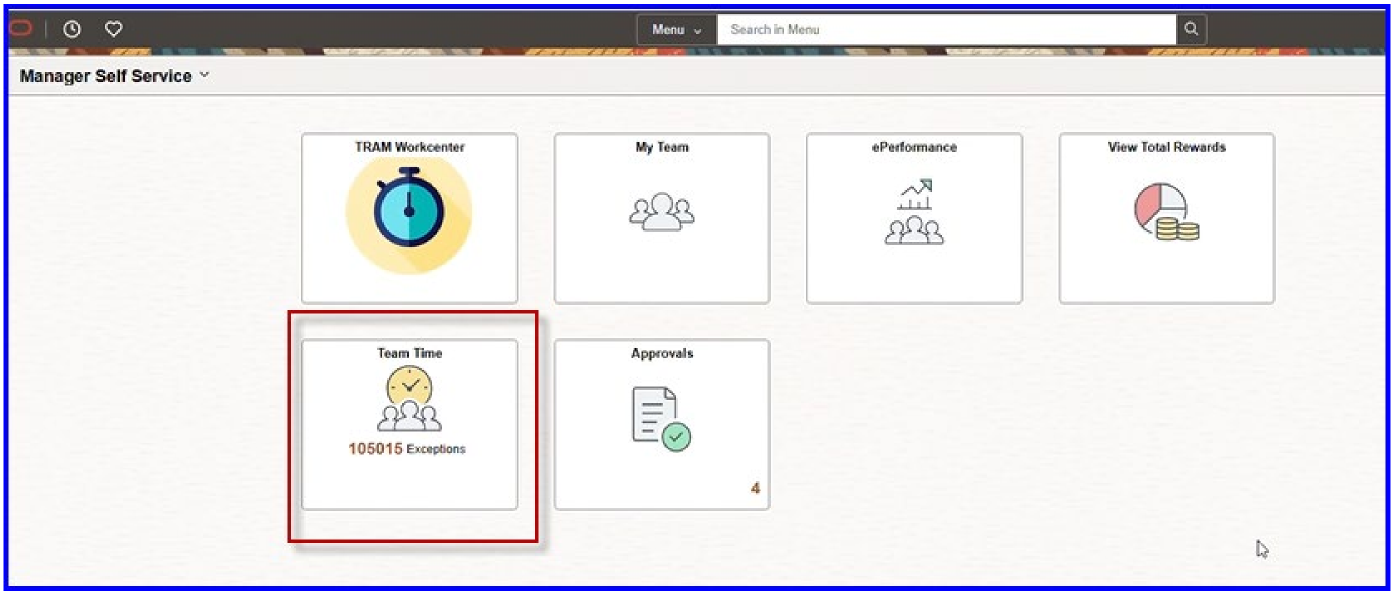
After the manager clicks **Partial Days**, select **Start Day Only**. The **Duration** field will populate. Enter the number of hours the employee is to take off, then click **Done.** Click the **Attachment** button to load any supporting documents to the request. Once the request is complete, click the **Submit** button to complete the request.



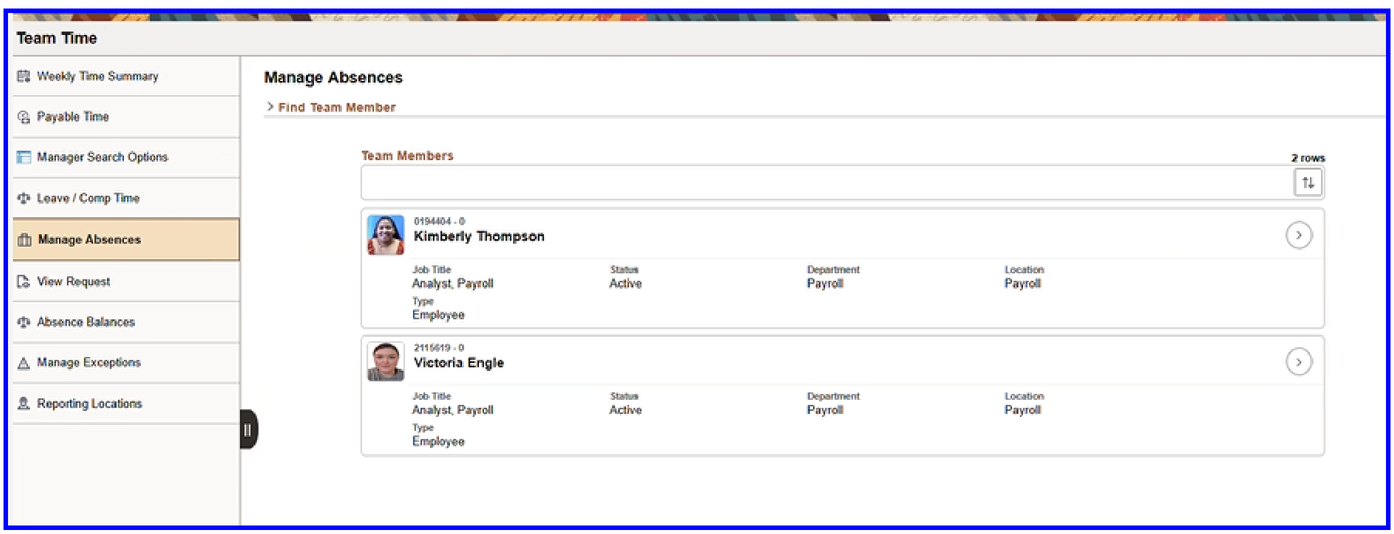




To view the absence, the manager should navigate to **Manager Self Service** and select the **Team Time** section to access and manage pending absences.



A Team Time list displays in the left pane. The manager should click **View Request**, then select the employee for whom they would like to view.



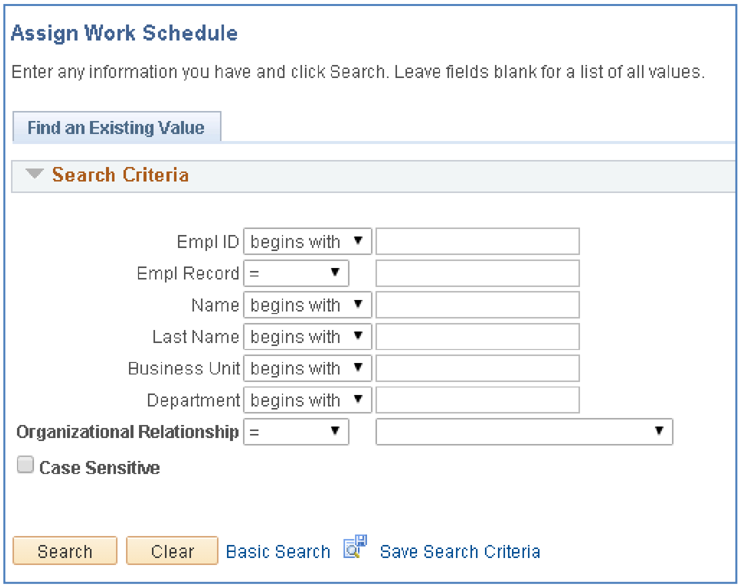
Managing/Changing Schedules

All employees, regardless of benefits eligibility, are required to have a schedule in TRAM, and they are assigned a schedule based on the defaults of the department in which they are employed. If an employee works a schedule other than the default, managers can assign a different schedule that reflects the correct work days and hours. This will enable the employee to submit an absence request in line with his/her schedule.

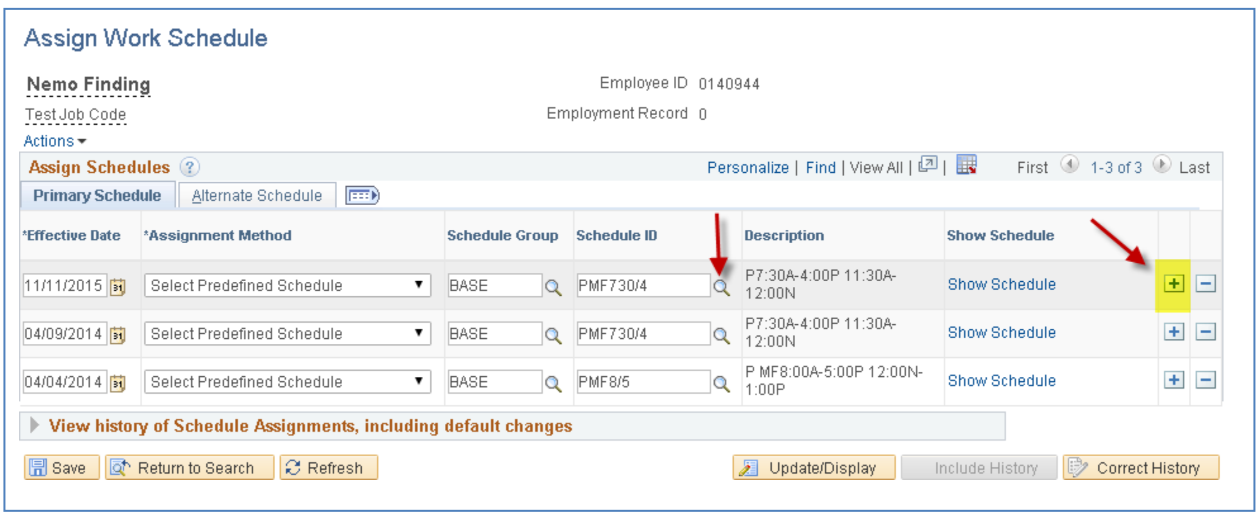
Non-benefits eligible hourly-paid employees are defaulted to a Monday-Friday 8 am to 5 pm work schedule. This allows employees to record punches any time, even if the day of the week or the hours worked are outside the schedule.

However, non-benefits eligible employees enrolled in work groups that accrue comp time are unable to request an absence on days they are not scheduled to work.

Upon hire or transfer, employees' schedules automatically default based on the hiring department's pre-determined schedule selection. Managers will only utilize the **Assign Work Schedule** option if the employee's schedule changes.



To assign a new work schedule, select the employee by entering the PS ID or employee name and click Search.

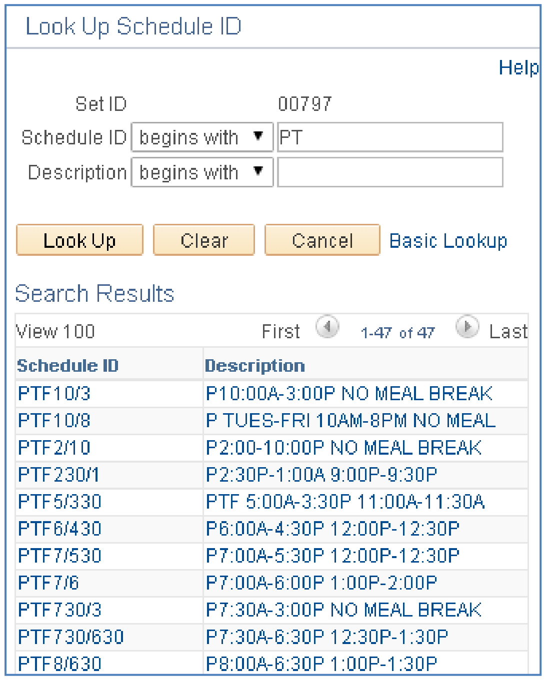


Select the plus sign to insert a new row. The effective date should be the beginning of a new pay period. (Pay periods begin on Wednesday at midnight and end on Tuesday at 11:59 pm. The effective date for any change to a biweekly employee must be the first Wednesday of a new biweekly pay period.)

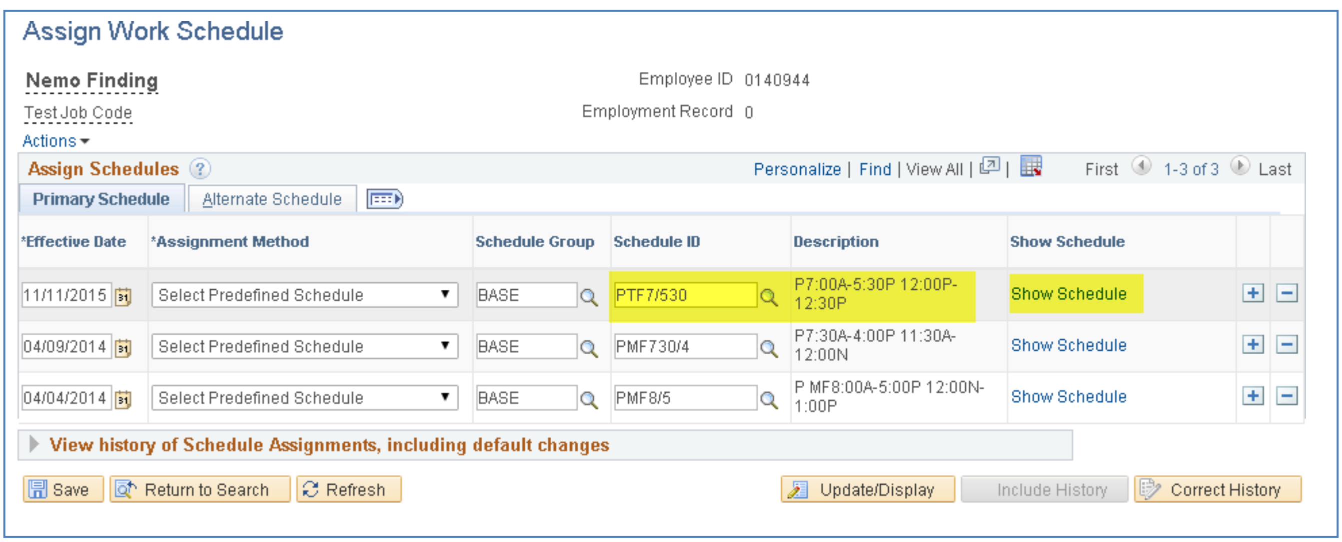
To view schedules that have been created, select “Select Predefined Schedule” under **Assignment Method**. The Schedule Group is always BASE. To pick a schedule, click the magnifying glass in the Schedule ID field. The following Look Up screen displays.

In order to narrow search results, enter “E” or “P” in the Schedule ID field to select between “Elapsed” (monthly-paid employees) and “Punch” (hourly-paid employees).

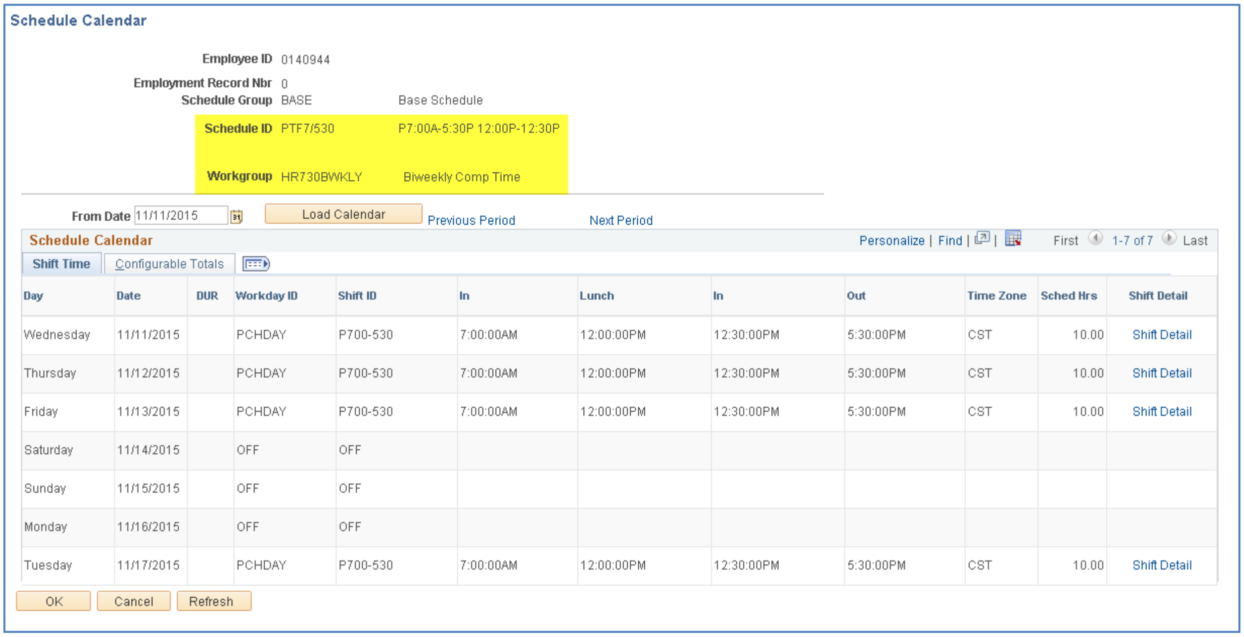
For example, EM will return all elapsed schedules that begin on Monday. You can select the Schedule ID or Description to view the full schedule. PT will return all biweekly schedules that begin on Tuesday.



Once the desired schedule has been found, select it, and it will populate on the new line that was added.



Click **Show schedule** link to view the schedule calendar:



Schedule Calendar

Employee ID 0140944
Employment Record Nbr 0
Schedule Group BASE Base Schedule
Schedule ID PTF7/530 P7:00A-5:30P 12:00P-12:30P
Workgroup HR730BWKLY Biweekly Comp Time

From Date 11/11/2015 Load Calendar Previous Period Next Period

Schedule Calendar Personalize | Find | First 1-7 of 7 Last

Shift Time | Configurable Totals

Day	Date	DUR	Workday ID	Shift ID	In	Lunch	In	Out	Time Zone	Sched Hrs	Shift Detail
Wednesday	11/11/2015		PCHDAY	P700-530	7:00:00AM	12:00:00PM	12:30:00PM	5:30:00PM	CST	10.00	Shift Detail
Thursday	11/12/2015		PCHDAY	P700-530	7:00:00AM	12:00:00PM	12:30:00PM	5:30:00PM	CST	10.00	Shift Detail
Friday	11/13/2015		PCHDAY	P700-530	7:00:00AM	12:00:00PM	12:30:00PM	5:30:00PM	CST	10.00	Shift Detail
Saturday	11/14/2015		OFF	OFF							
Sunday	11/15/2015		OFF	OFF							
Monday	11/16/2015		OFF	OFF							
Tuesday	11/17/2015		PCHDAY	P700-530	7:00:00AM	12:00:00PM	12:30:00PM	5:30:00PM	CST	10.00	Shift Detail

OK Cancel Refresh

For this example, the manager has selected a schedule with work days from Tuesday to Friday, and off days from Saturday to Monday. The work hours are 7 a.m. to 5:30 p.m. with a 30-minute lunchbreak. NOTE: According to this schedule, the employee cannot request an absence for a Monday, as that is a scheduled day off. We can also see that this schedule is assigned to a work group in which employees who work more than 40 hours in a week accrue compensatory time instead of being paid overtime.

Select "OK" to return to the Assign Work Schedule page, and select **Save**.

Multiple lines can be added for future schedules. From the drop-down menu, click "Select Predefined Schedule." Follow the previous steps to search for the appropriate Schedule ID.

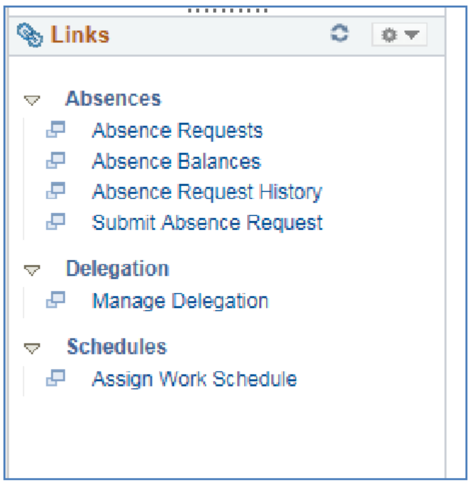
To delete a future-dated schedule row, select the minus sign on the line to be removed.

The new default schedule will now appear for the employee. Select **Save**.

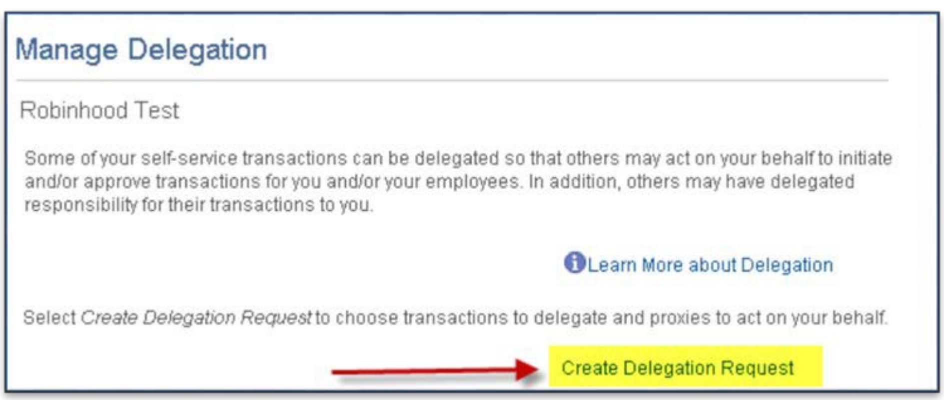
Assigning a Delegate

If a manager will be out of the office during the payroll deadlines, it is the manager's responsibility to delegate their TRAM duties to a proxy to complete. If a delegation is not created, employees reporting to the manager may not be paid. Reports To managers are able to assign one delegate to act on his/her behalf to correct timesheets, manage exceptions, approve payable time, and approve absence requests.

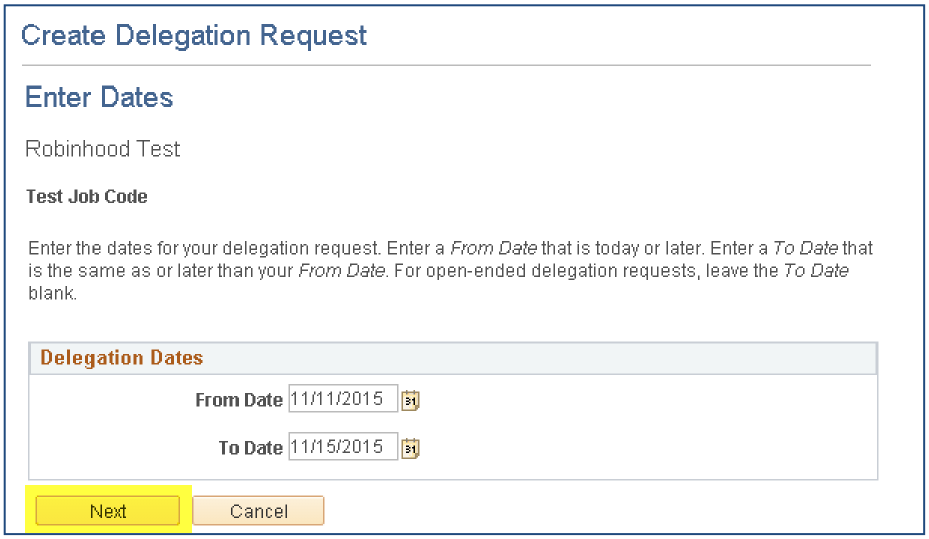
The **Manage Delegation** page can be accessed from the TRAM WorkCenter, or through the Self Service menu.



Once the Manage Delegation page is clicked, select the **Create Delegation Request** link.

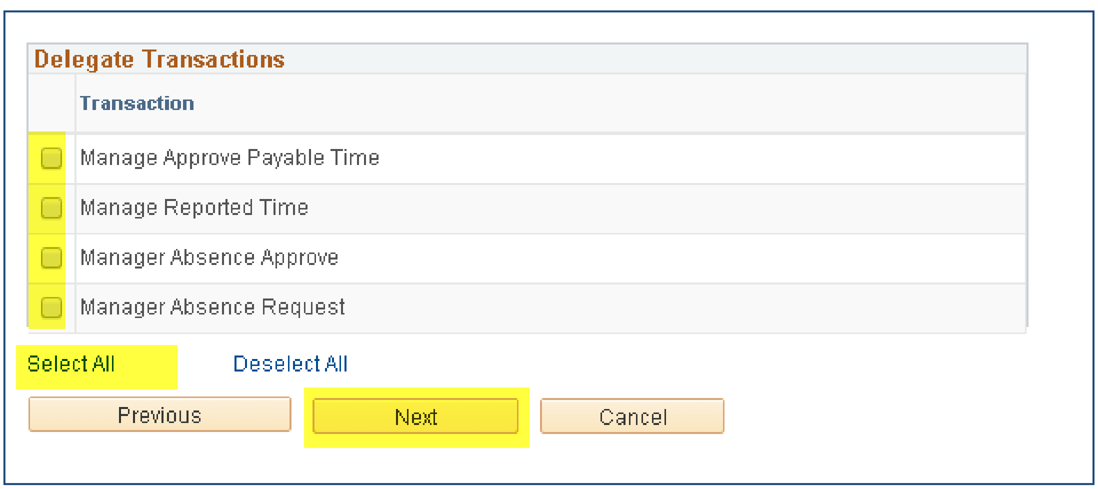


Enter the effective dates for the delegation request. The **From Date** should be the first day that the Reports To manager is out of the office.

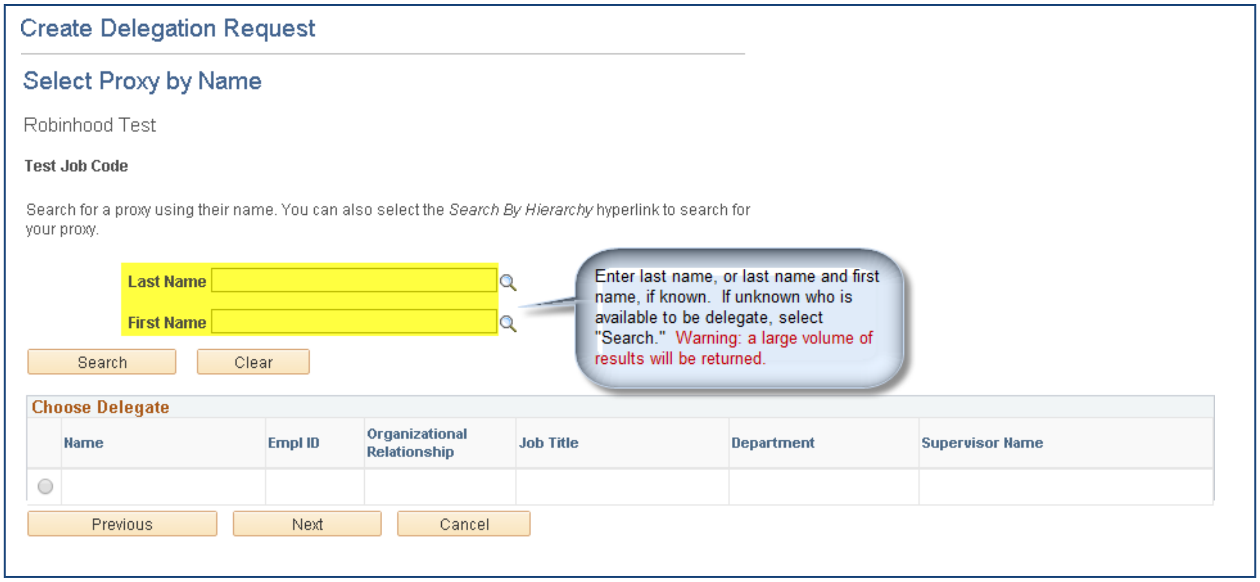


For open-ended delegation requests, leave the "To Date" blank. Select the **Next** button. During this period, all workflow transactions requiring approval will be sent to the proxy.

Select the transactions to be delegated to the proxy. One or more selections may be made. Options include approving employee's Payable Time, updating timesheets (Reported Time), approving Absences, and submitting an Absence on an employee's behalf. Click the **Next** button.



Enter the proxy's last and first name in the appropriate box, and select **Search**.



Select the radio button next to the employee's name to be used as the proxy, and select **Next** and then **Submit** the request.

The manager will receive a message stating "You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request."

An email will be sent to the proxy informing them that they have been selected to act as a proxy. The proxy will need to do the following steps to Accept/Deny the request.

- Log into PeopleSoft
- Navigate to the Self Service page
- Scroll to Manage Delegation
- Select "Review My Delegated Authorities"
- Select "Show my requests by status 'Submitted'"
- Select "Multiple Transactions" to determine the details of the delegated activities from the primary manager. One or more of the choices can be selected by the delegate
- Return to the following page, select the checkbox next to "Multiple Transactions," and make selection from "accept" or "reject"

An email will be sent to the manager notifying them of the proxy's selection.

Rules and Workgroups

Rules

Rules are pre-defined in the system and utilized by the Time Administration process that runs daily. The process calculates and applies rules based on the reported time worked, absences, and workgroup the employee is assigned to. Among the rules that are applied are:

<u>Overtime for hours actually worked over 40</u>

If an employee is assigned to a workgroup that pays overtime and they actually works over 40 hours (not including paid absences), PeopleSoft will apply the overtime rule that automatically pays hours worked over 40 as paid overtime.

<u>Comp Time 1.0 or 1.5 for hours over 40</u>

If an employee is assigned to a workgroup that earns comp time and weekly hours exceed 40, the system will apply the comp time rules that will automatically take the hours over 40 and add comp time earned to the employee's leave balance.

Workgroups

A workgroup consists of a set of time reporters who share compensation requirements such as pay frequency and work location/home department.

Hourly employees' work groups consist of the following attributes:

- Comp time and TCD user
- Comp time and Web Clock user
- Overtime and TCD user
- Overtime and Web Clock user

Salaried employees are all monthly time reporters.

When an employee's Human Resources job data changes for reasons such as promotions, demotions, transfers, or rehires, his or her characteristics for workgroup membership may change, requiring an update in the Time and Labor Workgroup enrollment. When employees terminate, their workgroup enrollment in Time and Labor is automatically inactivated after 45 days.

Glossary

Absence Management

The electronic process employees use to request leave via P.A.S.S., processed via electronic workflow to the employee's reports-to manager.

Cancel

An action taken when an absence request for a time frame was saved or denied to the employee for editing or for cancellation.

Deny

The reports-to manager denies an employee's absence request for leave. The reports-to manager may recommend editing and resubmitting the request.

Reports-to Manager

Based on position management hierarchy, employees have a direct report-to relationship with his or her first-level manager. This role provides access to the Time Reporting and Absence Management (TRAM) component (as well as to the ePerformance component for UH Main campus). The Reports-to Manager (Manager) is responsible for completing the following TRAM functions by noon every Wednesday

- Approving payable time for an employee or group of employees
- Making corrections to timesheets for missed or out-of-order punches
- Reviewing and approving payable time
- Managing exceptions
- Responding to absence requests (approving or denying)
- The manager is also responsible for managing/changing employees' schedules as needed.

Punch

The term used to describe the action when an hourly-paid time reporter enters his/her time via a web clock or time collection device (TCD). Punches include the following:

- In (arrive to work)
- Meal (leave for meal)
- In (return from meal)
- Out (leave for the day)

Time Collection Device (TCD)

An electronic device used for hourly employees to report time worked. TCDs are located in designated areas where the employee is responsible for clocking in by scanning his or her thumb or other finger to report time worked. Data from TCDs are collected and loaded to PeopleSoft for processing.

Time Reporting Code (TRC)

Corresponds to the time reported for an employee. Regular time is TRC 020, overtime is TRC 315, and comp time earned is TRC 190 or 300. There are also time reporting codes associated with absence requests and corrections made to absence requests on the timesheet.

Time Reporter

Employees are responsible for entering time worked into PeopleSoft on a daily basis via TCD or web clock and/or responsible for submitting absence requests via P.A.S.S.

TRAM

Acronym for Time Reporting and Absence Management, an automated application for capturing and processing time worked and absences requested and reported in PeopleSoft.

Web Clock

An online-based time collection system for hourly employees located in P.A.S.S. Hourly employees assigned the role of web clock user are responsible for punching in and out via the web clock to report time worked. Time is transmitted from web clock punches to the employees' timesheets in PeopleSoft for processing payment for hours worked

Planned Absence. Planned Absence

An absence for which a request has been approved, such as sick leave, vacation, jury duty, etc

Scheduled Holiday Holiday
Scheduled holiday(s) for the University of Houston

Scheduled OFF day OFF Scheduled OFF Day
a day on which an employee is not scheduled to work – i.e. an employee with a Monday-Friday schedule will see "OFF" on each Saturday and Sunday of the schedule