



PEOPLESOFT 9.2 TRAM EMPLOYEE GUIDE

Contents

TRAM Employee Responsibilities	1
Exempt-Benefits Eligible Employees (Salaried).....	1
Non-Exempt Benefits-Eligible Employees (Hourly)	1
Non-Exempt Non-Benefits Eligible Employees (Temporary and Student Workers).....	1
Accessing PeopleSoft	2
Web Clock Users	3
Time Collection Device (TCD) Users	4
About the TCD	4
TCD Punches.....	4
Exception Users.....	6
Troubleshooting	7
Employee Guide for Requesting Leave	7
Workflow	7
Submitting an Absence Request.....	8
Holidays	10
Absence Request History	11
Processes	12
Employees' View Timesheet Guide	12
Glossary	14

TRAM Employee Responsibilities

Exempt-Benefits Eligible Employees (Salaried)

- Responsible for creating absence request in TRAM. After the employee submits the request, the Manager is able to evaluate it under Manager Self-Service
- The absence request cannot be modified once it is submitted. An absence request is only able to be modified if the Manager denies the request.
- The Absence Request is approved once the Manager or delegate approves it; it does not require additional approvals

Non-Exempt Benefits-Eligible Employees (Hourly)

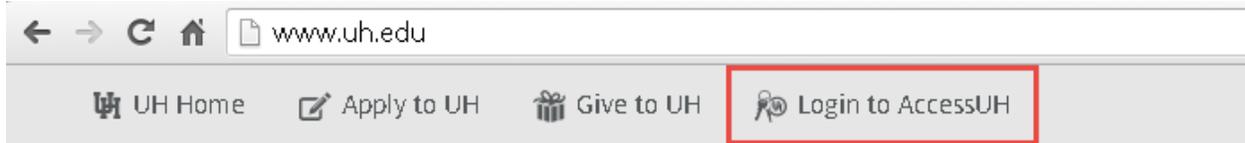
- Responsible for submitting Absence Request
- Responsible for punching in and out via
 - Web Clock
 - TCD (Time Collection Device)
 - Only one method can be used by an employee for each active job record
- Exceptions will be generated for the following reasons:
 - Missed punch or out-of-order punch
 - Lunch is greater than 2 hours
- Overtime is to be approved in advance by the employee's manager
- Non-Exempt Employees with Multiple Job Records
 - The employee will be responsible for selecting the correct empl record from a menu that will appear with the empl (job) record and title based on job data

Non-Exempt Non-Benefits Eligible Employees (Temporary and Student Workers)

- Responsible for punching in via:
 - Web Clock
 - TCD (Time Collection Device)
- Exceptions will be generated for the following reason:
 - Missed punch or out-of-order punch

Accessing PeopleSoft

Log into P.A.S.S. via AccessUH, which can be found on the upper right hand corner of the UH website: www.uh.edu.



UNIVERSITY of HOUSTON

The employee enters his or her CougarNet ID and CougarNet Password to log in.

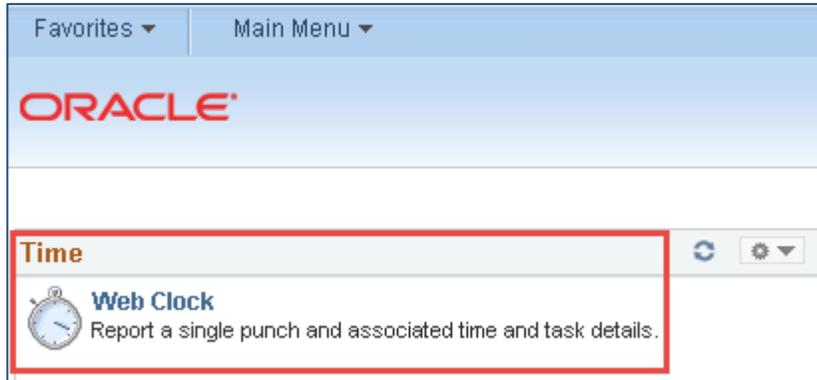
A screenshot of the AccessUH login form. At the top, there are two tabs: 'CougarNet Login' and 'myUH (PeopleSoft) Login'. On the left, there is an icon of a key with a red circular badge that says 'ACCESS UH'. The form contains two input fields: 'CougarNet ID:' and 'CougarNet Password:'. To the right of the 'CougarNet ID' field is a red link that says 'Don't know your CougarNet ID?'. To the right of the 'CougarNet Password' field is a red link that says 'Change/Reset your CougarNet Password.'. Below the input fields is a red button that says 'Login to AccessUH'.

For TRAM purposes, select the P.A.S.S. icon.



Web Clock Users

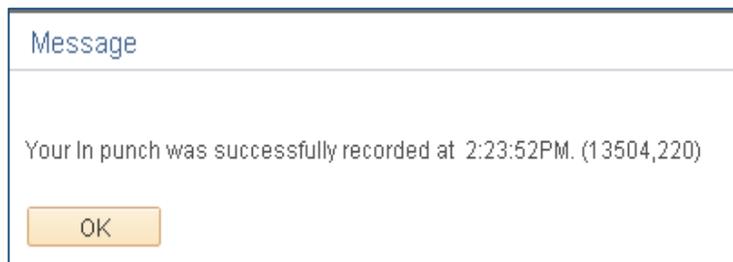
Once the P.A.S.S. icon is selected, employees designated as web clock users will have a Web Clock icon available on their home page.



Select Web Clock icon and the punch screen will appear. Select the desired punch type from the drop down menu and click on Enter Punch.

 A screenshot of the 'Web Clock' application interface. At the top, it displays the user's name 'Mickey Mouse' and 'Test Non-Exempt', along with 'Employee ID 9991236' and 'Employment Record 0'. Below this is a section titled 'Your Last Recorded Punch' showing 'Meal at 12:03:00PM'. The main area is titled 'Enter Punch' and contains a dropdown menu for '*Punch Type' with 'In' selected, and a 'Time Zone' dropdown with 'CST' selected. A red box highlights the '*Punch Type' dropdown. To the right of the dropdowns is a yellow 'Enter Punch' button, also highlighted with a red box.

A message box will appear confirming the punch was successful.



A typical day might produce the following punches:

- *In (first punch of the day)*
- *Meal (out for lunch)*
- *In (return from lunch)*
- *Out (last punch of the day)*

Time Collection Device (TCD) Users

About the TCD

The following information is for employees using a Time Collection Device (TCD) for recording time worked:

- Employees will be assigned to specific TCDs on campus.
- Employees will only be able to clock in using the TCD(s) for which they are authorized.
- Each department maintains a list of locations of authorized TCDs for their area.
- Multiple fingers are scanned in case one finger becomes injured.
- Fingerprints are scanned only for the TCD system and are only used by the University of Houston HR System for Time Collection Devices.
- Fingerprint data is not released to outside parties and cannot be accessed by employees.
- Once the fingerprint is taken, it is stored as an algorithm, or mathematical calculation. No actual fingerprint will be on file.



TCD Punches

Employees recording punches via the TCD need to select the type of punch (choices are: In, Start Meal, End Meal, and Out).

A typical day might produce the following punches:

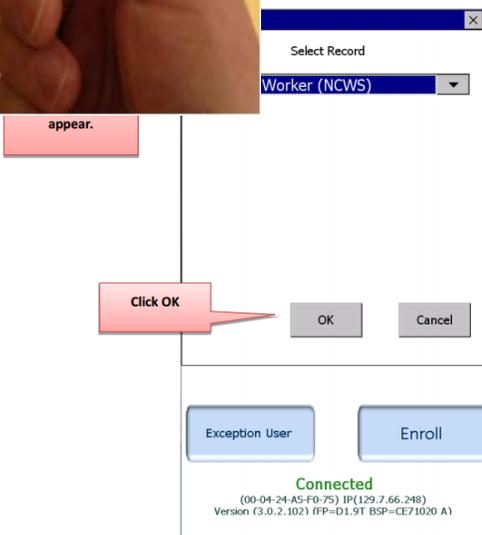
- *In (first punch of the day)*
- *Start Meal (out for lunch)*
- *End Meal (return from lunch)*
- *Out (last punch of the day)*

After the appropriate punch type is selected, the employee scans his /her finger.

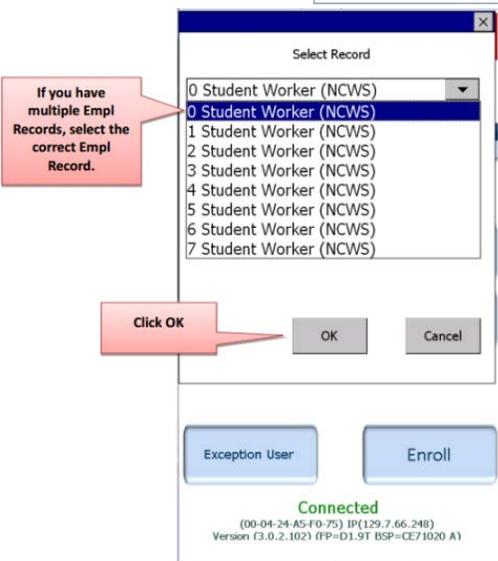


- The employee should present one of the fingers that s/he enrolled with on the finger scanner.

- If the employee has only one employee record, it will be highlighted. Click ok to continue.



- If the employee has multiple employee records, all will appear. Select the correct employee (job) record, and click ok to continue.



- It is the employee's responsibility to know the correct employee (job) record for the assignment he or she is working.
- Employees must clock in and out for each assignment. *Example: if an employee works multiple jobs in one day, the employee will have to clock out of empl record 1 before clocking in on empl record 0, etc.*



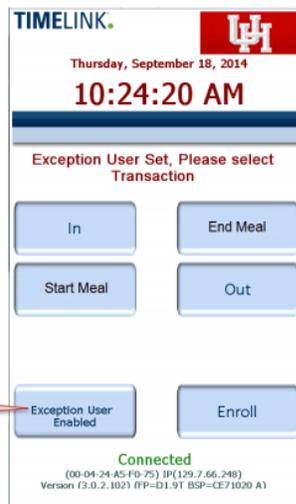
Confirmation with name and Empl ID

- On a successful punch transaction, the device will display a green banner with the employee's name and the PS ID. The employee will then have confirmation of a successful punch.

****Important**** The employee should confirm that his/her name and PS ID appear on the green banner. In very rare cases, some individuals have finger attributes that are close enough for the device to assume that it is another employee and will display the other employee's name. If the correct name does not appear, the manager should be notified immediately, so the time is reported in PeopleSoft and is reflected on the employee's timesheet.

Exception Users

Exception users are created when an employee completes the finger scan process and the system is unable to read any finger scan for registration as a TCD user. After receiving notification from the employee's manager that this is the case, Human Resources will create a specialized account for the employee in order for him/her to record time using the PS ID on the TCD. This type of time reporter is known as a TCD Exception User.



Exception User

- The employee will click on the Exception User tab on the TCD. This will enable the device to validate the employee by looking up the PS ID instead of the fingerprint.
- Once the employee selects "Exception User," the TCD will prompt the employee to select a transaction. Select the punch type (*In, Start Meal, End Meal, Out*).



- Instead of prompting the employee for the fingerprint, the device will display a number pad. The employee will key in his/her PS ID and then click on the “OK” key.
- On a successful transaction attempt, the device will display a green banner with the employee’s name and PS ID. The employee will then know that the punch is successful.
- The recorded time is reported to PeopleSoft and is reflected on the employee’s timesheet.

Troubleshooting

If there are TCD issues, the manager or department supervisor is to be notified.

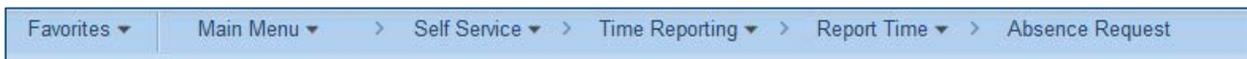
If an employee forgets to punch in or out, s/he should immediately notify his/her supervisor. The manager will be able to manually correct time.

Employee Guide for Requesting Leave

Workflow

- The employee initiates workflow by submitting an Absence Request through P.A.S.S.

Navigation:



- If the employee has enough hours, the system will allow him or her to successfully submit the request. If not, the request cannot be submitted.
- The submitted absence request is sent to the reports-to manager.
- The reports-to manager has the ability to:
 - Approve: The absence request is only approved once. Once it is approved, it is final.
 - Deny: The reports-to manager can deny the request and make recommendations to edit and resubmit the request.

Submitting an Absence Request

The screenshot shows the Oracle HR92TST - Home interface for submitting an absence request. The breadcrumb trail is: Favorites > Main Menu > Self Service > Time Reporting > Report Time > Absence Request. The user is Mickey Mouse, with the role Test Non-Exempt. The form includes an 'Instructions' section with the text: 'Enter Start Date, Type of Absence, and Requested fields. The absence request can be saved for later or submitted for approval.' The 'Absence Detail' section contains a required start date field set to 11/30/2015, a 'Filter by Type' dropdown menu set to 'All', and an 'Absence Name' dropdown menu set to 'Select Absence Name'. There is a 'View Monthly Schedule' link. The 'Comments' section has a 'Requestor Comments' text area. At the bottom, there are links for 'View Absence Request History' and 'View Absence Balances', and an 'Attachment' button. A legend indicates that an asterisk (*) denotes a required field.

- Select the start date of the absence. Type in the date in MM/DD/YYYY format or click on the calendar icon to select the specific date.
- Absence request history and monthly schedule can also be viewed at this site.

Filter by type

- Absence types can be filtered by using the drop down menu to "Filter by Type."
- Only absence types associated with the employee's role will appear in this list.
- Select the absence type in the Absence Name.
- When the type of absence is selected, multiple fields open on the form.
- Complete required fields, including the absence end date.
- To complete the end date, enter the last day of your leave in the field with the MM/DD/YYYY format, or select the calendar icon and date.

Several absence types require additional justification or reason

- Sick leave requires that the employee indicate if the absence is for self, spouse, child, or parent.
- If additional information is required, the comments field is available.
- After completing the information requested, the request can be saved for later or submitted to the manager.

Absence balances

- Current Balance shows the current available leave balance.

- The projected balance appears on the absence request page once an absence type is selected. The projected balance includes the current balance plus anticipated accruals between current date and leave date.
- *Example: if an employee's current vacation balance is 327 hours, and the employee has requested 104 hours of vacation six months in the future:*
 - *Current balance: 327 hours*
 - *Projected Balance: 407 hours*
- Once the absence request has been submitted, the employee can navigate to View Absence Balances, and s/he will see that the current balance has been reduced by the number of hours submitted on the absence request.

Partial Days

- If partial days are taken, the employee indicates on the absence request dates which will be partial days and enters the hours to be missed in the duration field.
- The employee's current leave balances appear on the right side of the screen. If there are insufficient hours available for the absence request, PeopleSoft will not allow the request to be submitted.

If an employee requests partial days on a leave request, the field for the number of hours will appear. The requested partial leave hours are entered in the new field for entire duration of leave requested, first day, end day, or first and end day.

Attachment

Some absences require an attachment to the request, such as requests for jury duty leave.

- If an attachment is required, save the request
- Once saved, select "Attachment"
- Select the attachment type from the drop down menu
- Select "Add Attachment"
- Choose file and upload
- A document may be added, viewed, or deleted
- Attachments cannot be added after an absence request has been approved, denied or cancelled

Complete and submit

- When "Calculate Duration" is selected, hours will be calculated for the amount of leave requested in the duration field.
- When absence requests have been completed, they can be saved for later or submitted to the reports-to manager.

Confirmation

When absence requests are submitted, a confirmation is returned.

- After selecting “OK,” the status of the request is available.
- The status is “pending approval” once the request has been submitted.
- The request will be sent to the reports-to manager for approval. If the reports-to manager has identified a delegate, that person alone has access to requests unless and until the delegation period is revoked or has ended.
- The reports-to manager can either approve or deny a request. A denied request can be edited at the request of the reports-to manager.
 - Approve: no other action can be taken. If the Absence Request needs to be modified, the reports-to manager will adjust the leave time on the employee’s electronic timesheet.
 - Deny: A denied request can be edited and resubmitted on the recommendation of the Reports to Manager. Leave is credited back immediately upon the denial.

Holidays

- Holidays are pre-programmed in PeopleSoft, and will not be included in the requested absence calculation.
- Holidays are paid based on the employee’s position FTE (Full-Time Equivalency).
- Full time employees (1.00 FTE), will receive 8 hours of pay for a holiday.
- Part time employees working 20 hours (0.50 FTE), will receive 4 hours for a holiday.
- Schedules vary across campus, and can affect vacation hours for calculating time during holiday weeks.
 - An employee who takes a week of vacation, and whose typical schedule is 9 hours on Monday-Thursday and 4 hours on Friday, and Friday is a holiday, will see that PeopleSoft calculates 36 vacation hours for the week: 9 hours for Monday through Thursday and 0 hours for Friday since it is a holiday.
 - On the other hand, an employee who takes a week of vacation and whose typical schedule is 9 hours on Monday-Thursday and 4 hours on Friday, and Monday is a holiday, will see that PeopleSoft calculates 32 vacation hours for the week, 1 vacation hour for Monday since it is a holiday, 9 hours for Tuesday through Thursday, and 4 hours for Friday.
 - It is the employee’s responsibility to discuss any adjustments to his/her schedule with his/her reports-to manager.

Absence Request History

Navigation:



- This menu allows the employee to:
 - View past leave requests
 - Edit and resubmit denied or cancel saved requests

ORACLE

Absence Request History

 **Mickey Mouse**
Test Non-Exempt

Instructions
Select date range of absences to be viewed. Select the absence name link to view request details. Select edit button to edit the request, submit the request for approval, or cancel the request.

From Through

Absence Request History Personalize | Find | View All | | First 1 of 1 Last

Absence Name	Status	Start Date	End Date	Duration	Requested By
Vacation	Approved	12/01/2015	12/02/2015	16 Hours	Employee Absence Request

[Return to Absence Request](#)

- Select specific dates to search.
- Select “refresh” to provide the results.
- Select “Edit” to open the request that requires correction
- Hours are added back to the current leave balance when a request is cancelled

Processes

- Once an absence request is approved or denied, the employee will be notified via email. The employee can also go to P.A.S.S. to view absence request history or status.
- Absence requests should be entered as soon as possible.
- Absences may be requested up to 120 days in the future.
- According to the Manual of Administrative Policies and Procedures (MAPP) and System Administration Memoranda (SAM), vacation with pay cannot be granted until the employee has had six months of continuous employment.
- If a mistake with an entry is discovered, the reports-to manager should be notified immediately.

Employee Timesheet View

Navigation:



The timesheet will open, showing the following:

New Window | Help

Timesheet

Mickey Mouse Employee ID 9991236
 Test Non-Exempt Empl Rcd # 0
 Actions Earliest Change Date 11/18/2015

Select Another Timesheet

View By Calendar Period Previous Period Next Period
 Date 12/02/2015
 Scheduled Hours 80.00 Reported Hours 8.00 Print Timesheet
 Show All Punch Columns

From 12/02/2015 to 12/15/2015

Comments	Day	Date	Reported Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity	Sched Hrs	Taskgroup	Time Zone	Date		
	Wed	12/2	Approved						170 - Vacation	8.00	8.00	HR730	CST	12/2	+	
	Thu	12/3	New								8.00	HR730	CST	12/3	+	-
	Fri	12/4	New								8.00	HR730	CST	12/4	+	-
	Sat	12/5	New								0.00	HR730	CST	12/5	+	-
	Sun	12/6	New								0.00	HR730	CST	12/6	+	-
	Mon	12/7	New								8.00	HR730	CST	12/7	+	-
	Tue	12/8	New								8.00	HR730	CST	12/8	+	-
	Wed	12/9	New								8.00	HR730	CST	12/9	+	-
	Thu	12/10	New								8.00	HR730	CST	12/10	+	-
	Fri	12/11	New								8.00	HR730	CST	12/11	+	-
	Sat	12/12	New								0.00	HR730	CST	12/12	+	-
	Sun	12/13	New								0.00	HR730	CST	12/13	+	-
	Mon	12/14	New								8.00	HR730	CST	12/14	+	-
	Tue	12/15	New								8.00	HR730	CST	12/15	+	-

Submit Clear

Summary Absence Exceptions Payable Time

Reported Time Summary Personalize Find 1-4 of 4

Category	Total	Week 1 (12/2-12/8)	Week 2 (12/9-12/15)
Total Reported Hours	8.00	8.00	
Total Scheduled Hours	80.00	40.00	40.00

View by

The employee may change the view by format for his/her timesheet

- Time Period
- Day
- Week
- Select the preferred time frame and select “Refresh”

Absence

The absence tab on the bottom displays the employee absence request history

Exceptions

To view an exception, click the **Explanation** link. High exceptions must be reported to the Manager.

Payable time

The employee can see all of his/her compensation history.

Punch Times

The punch times will reflect the actual time of the punch. Punch times include

- *In (first punch of the day)*
- *Start Meal (out for meal)*
- *End Meal (in from meal)*
- *Out (last punch of the day)*

The punch total will be the total time based on the actual time of the punches.

Scheduled Hours

The employee's scheduled hours for the day, according to the schedule in PeopleSoft

Comments

Any time a change is made to a timesheet, the reports-to manager must enter a comment. Select the balloon icon to view the comment.

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 with recommendations to the employee for editing.

Deny

The reports-to manager denies an employee's absence request for leave. A recommendation may be made by the reports-to manager to edit and resubmit the request.

Reports-to Manager

Based on position management hierarchy, the employee has a direct reports-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 a time reporter enters his/her time via a web clock or time collection device (TCD). Punches include the following:

- In (arrive to work)
- Start Meal (leave for meal)
- End Meal (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 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

A computer/web-based time reporting system located in P.A.S.S for hourly employees. Hourly employees assigned the role of web clock users 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.