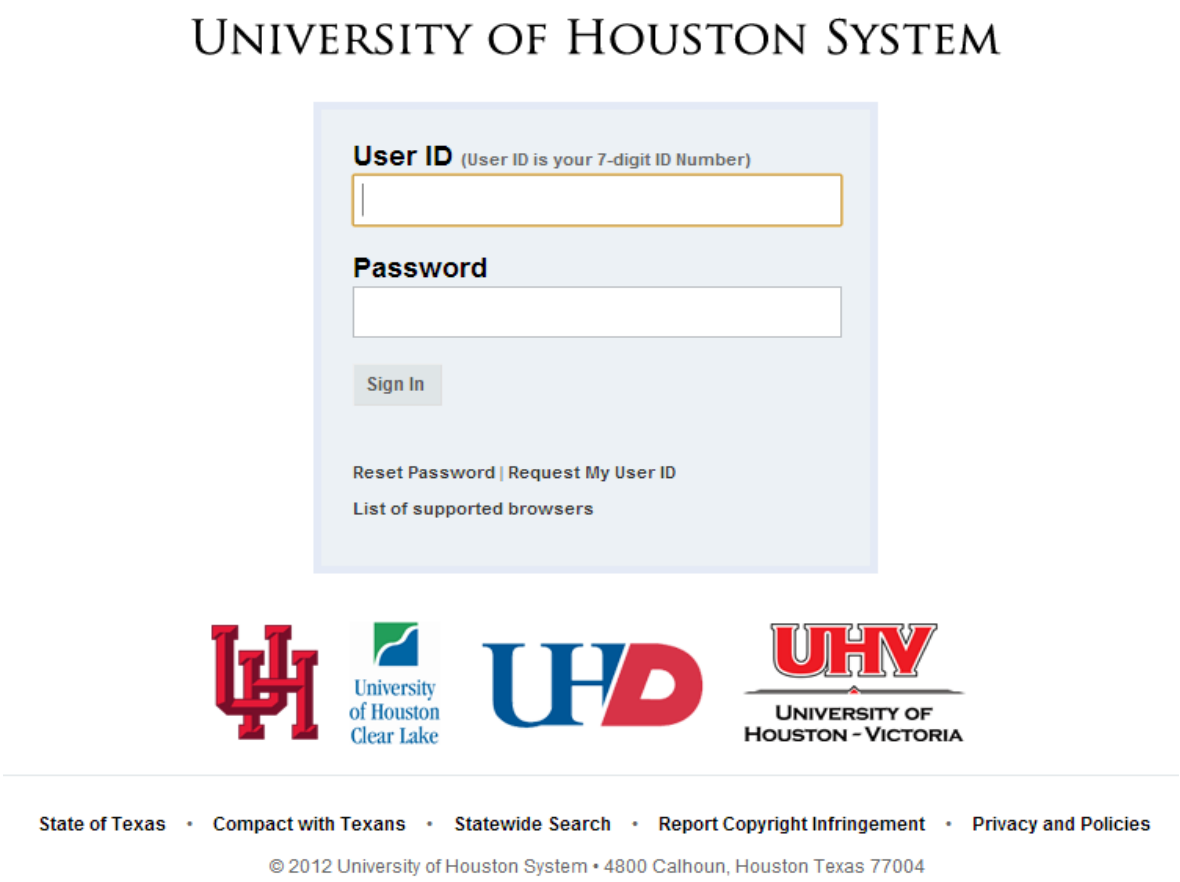
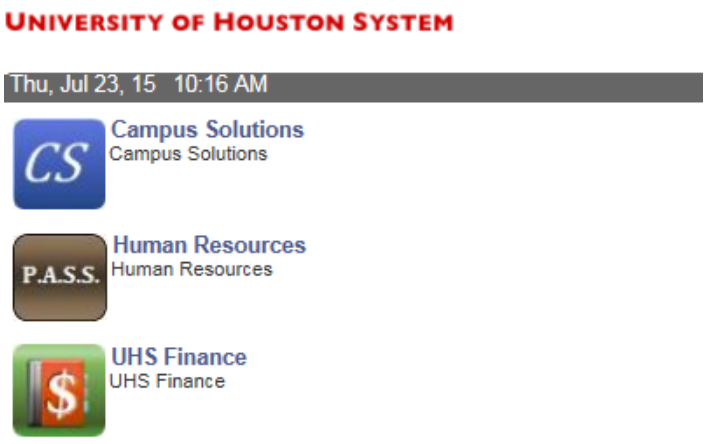
LOGGING IN VIA PEOPLESOFT PORTAL

Log onto your PeopleSoft account directly via https://my.uh.edu and enter your Employee ID and Password:



Log into P.A.S.S. HR and Campus Solutions.

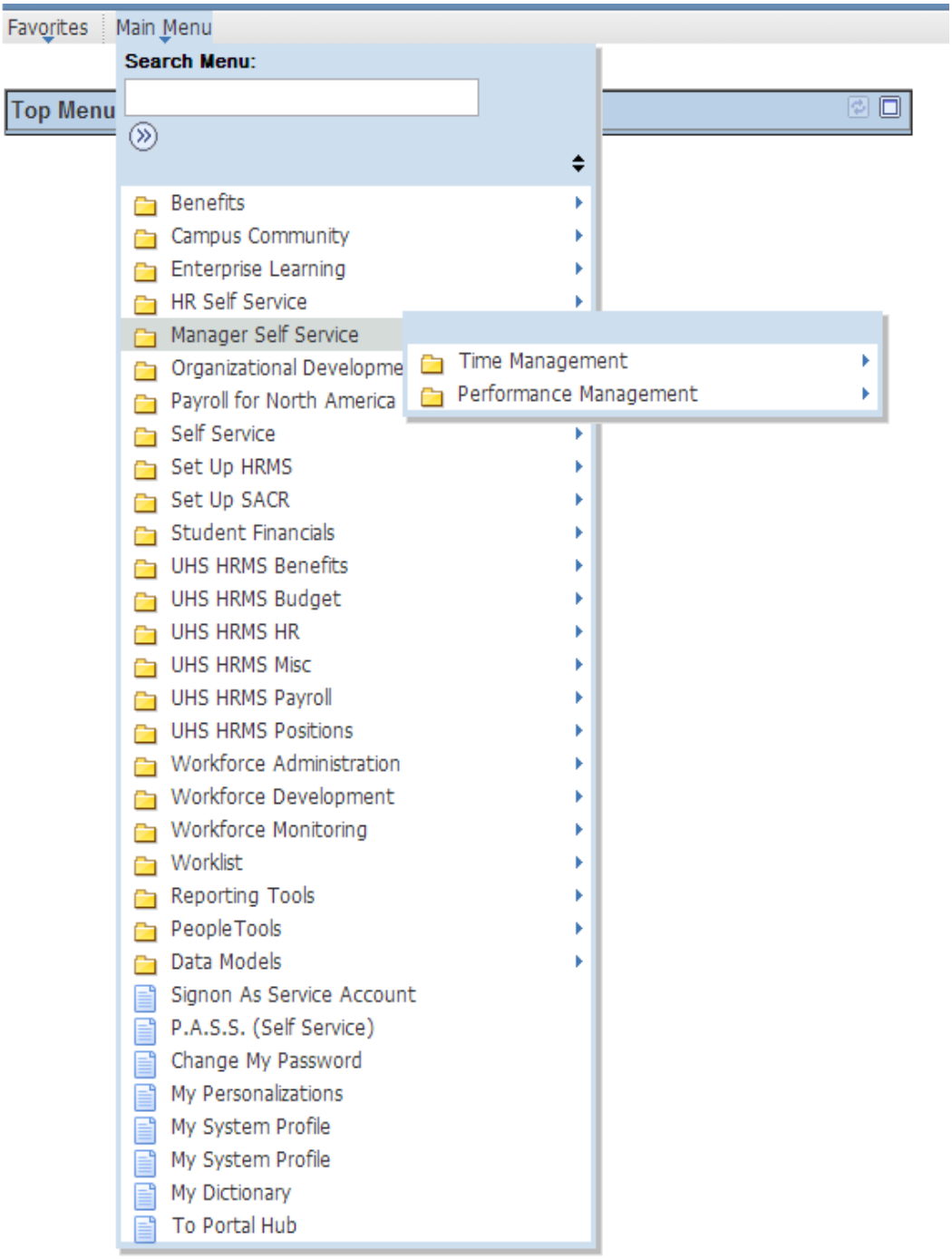
Select Human Resources



ACCESSING TIME MANAGEMENT

All of the Time Management menus are located under Manager Self Service. Click onto the Time Management Folder to open up the menu of options.

Main Menu>Manager Self Service>Time Management



TIME APPROVER (TA) ROLE

- In order to have access as a TA, the following is required:
  - The required training
  - PeopleSoft Security Form completed, signed and sent to HRMS
- The TA is responsible for
  - Managing schedules
  - Reviewing and approving reported time
  - Making corrections to reported time
  - Managing exceptions
  - Approving absence requests
- When a TA needs to add a punch/make a correction on the Reported Time Timesheet screen
  - The TA needs to enter comments next to the punch entered to justify why the employee did not enter the punch and then hit submit to save the punch entered.
  - After the punch is submitted, the TA will need to approve the time.
- Regular hours and holidays should not be adjusted.
- TAs need to approve all Reported Time by noon every Wednesday (once the work week has ended; a work week is from Wednesday – Tuesday)

RULES & WORKGROUPS

Rules: are generated by the Time Administration process that is run for each Pay Period. The process calculates all approved time and applies rules based on the approved time and workgroup the employee is assigned to. The main rules that are applied are:

- Overtime or Extra hours for hours over 40
    - If an employee is assigned to a workgroup that pays overtime and he works over 40 hours the system will apply the overtime rule that will automatically take the hours over 40 and pay as overtime.
- Comp Time 1.0 or 1.5 for hours over 40
    - If an employee is assigned to a workgroup that earns comp time and he works over 40 hours the system will apply the comp time rules that will automatically take the hours over 40 and pay as comp time earned.

Rules are applied at the end of each week for hourly employees after the Time Administration process has run. This will ensure that all time is processed and paid accurately.

Keep in mind that if corrections are made after the initial Time Administration process has run, you will need to reapprove the reported time, then approve the payable time after Time Administration has run *(remember this is the process that converts approved reported time to unapproved payable time and applies the rules).* The correction that is processed can change the rules that are applied.

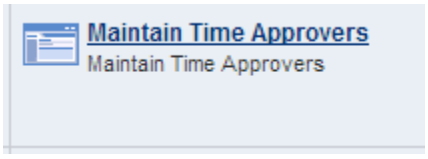
Workgroup: is a set of time reporters who share compensation requirements such as pay frequency and work location.

Examples are: Hourly employees and Salary employees. When an employee's HR data changes for reasons such as promotions, demotions, or transfers, their characteristics for Workgroup membership may change, requiring an update in the Time and Labor Workgroup enrollment. When employees are terminated, their Workgroup enrollment in Time and Labor must be inactivated.

MAINTAIN TIME APPROVERS

- **Add Proxy**
- **Add Employees**
- **Transfer Employees**
- **Delete Employees**

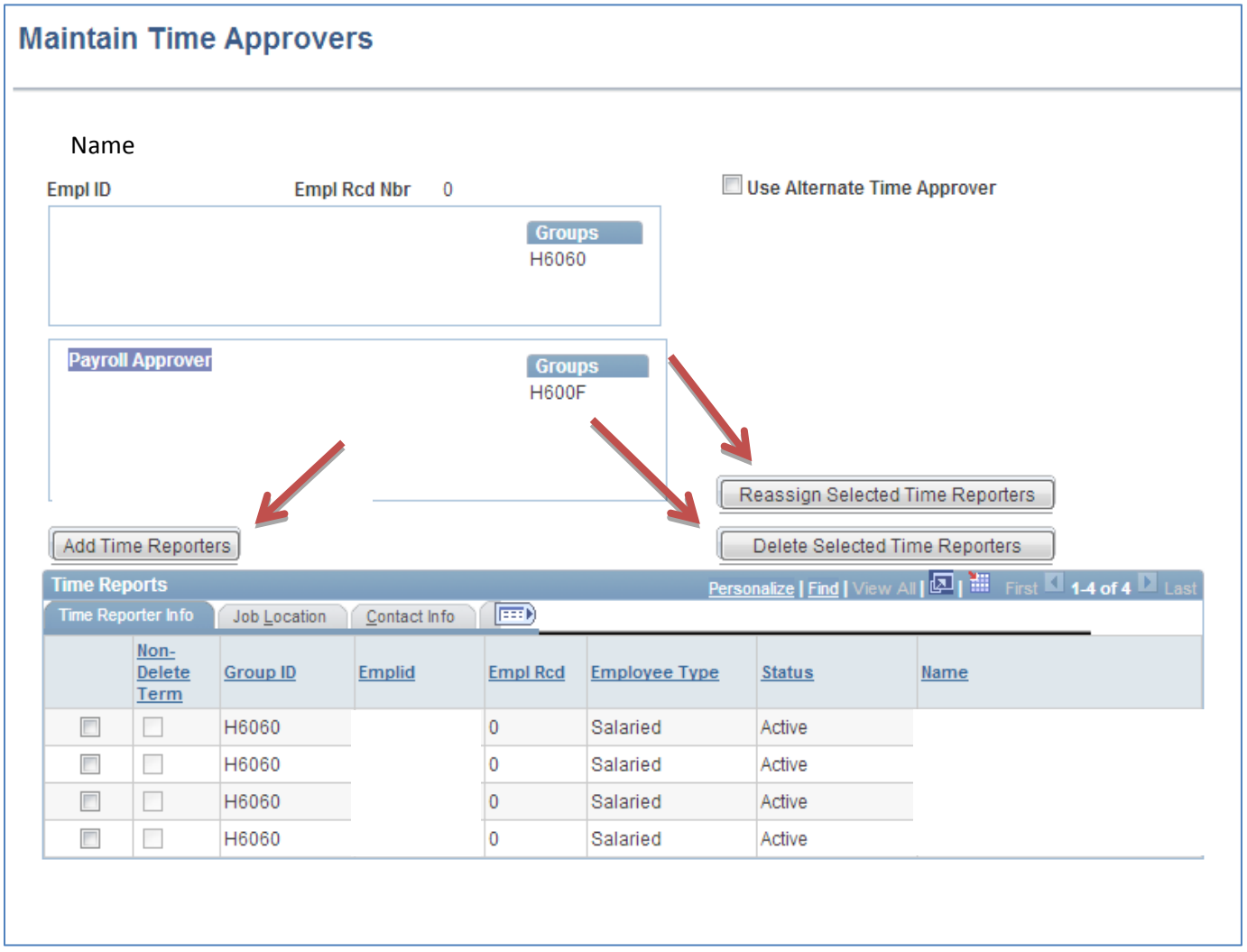
Main Menu > Manager Self Service > Time Management > Maintain Time Approvers



- The system refreshes three times a day. Information entered will be available after a refresh occurs.
- Click onto the “Maintain Time Approvers” file.

Maintain Approvers

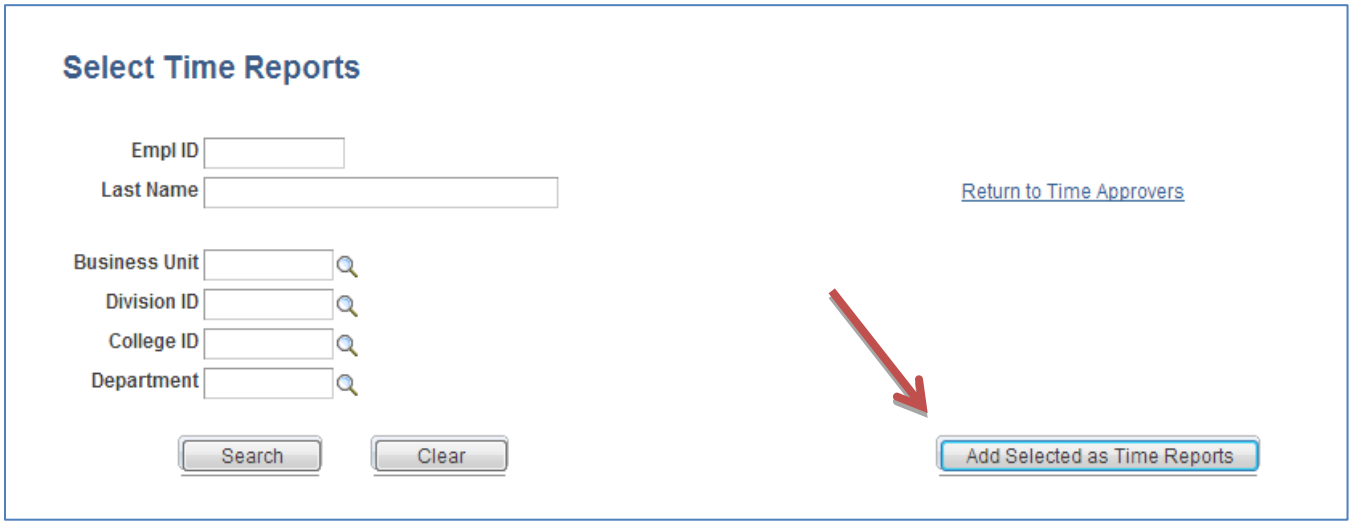
- This will bring a list of your employees (or Time Reporters)
- You can add or delete employees through the Maintain Approvers folder
- It is important to keep the list of employees current; otherwise, you will not be able to view the employee data if they are not added or another department will not be able to add the employee if they are not transferred from your list
- The data can be viewed with different criteria
- Default is Time Approver info but you can also click on job location and contact information or view all columns
- You are also able to download the data and view all by selecting the command on the tool bar
- TAs will have access to the employees that report to them



Adding Employees

You can add employees by clicking on “Add Time Reporters”. Enter the Empl ID and search for the new employee.

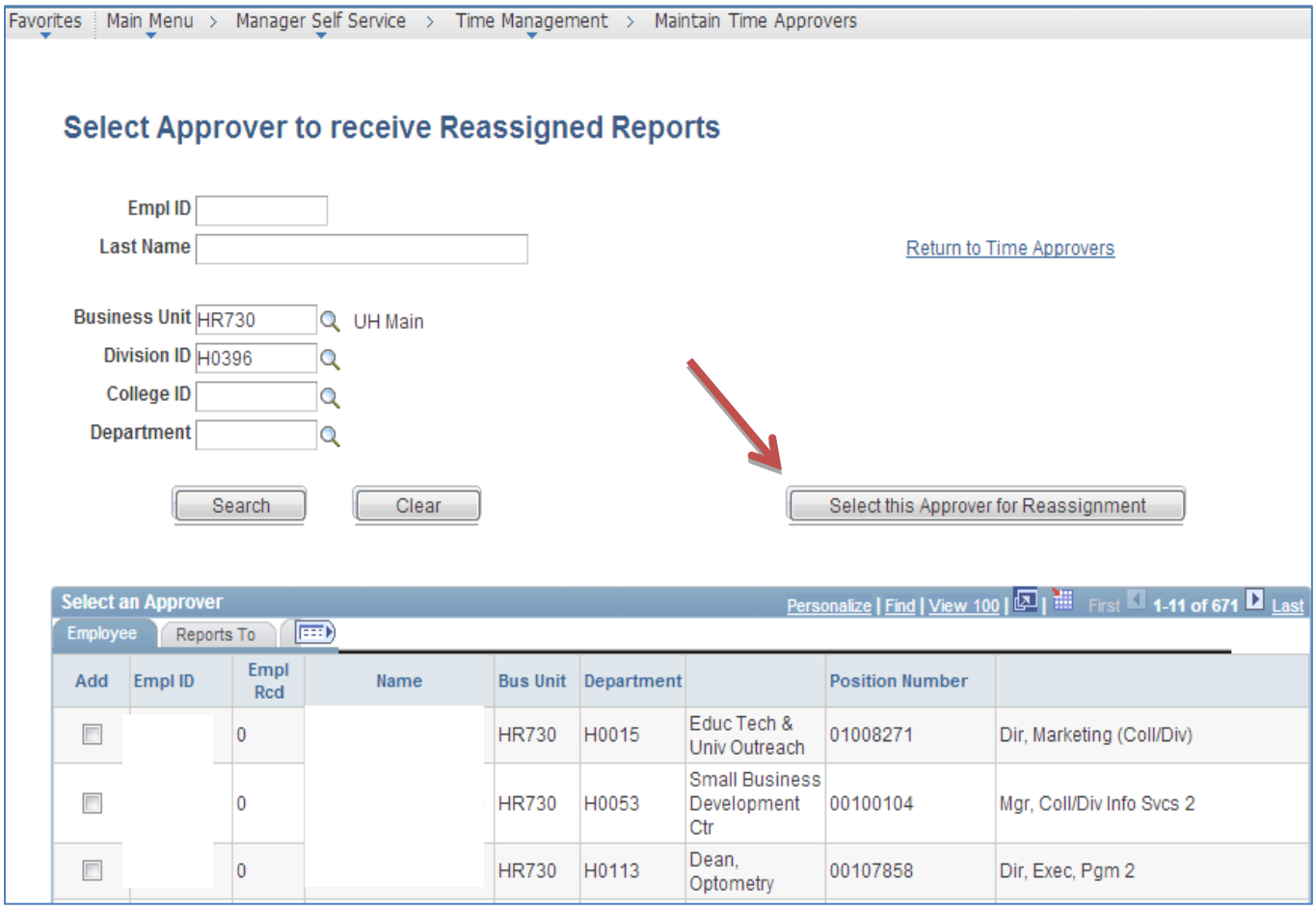
- Add Time Reporters
  - Click “Add Time Reporters”
  - Enter criteria and search for Time Reporter(s)
  - Check “Add” box to Select Time Reporter(s)
  - Click “Add Selected as Time Reports” to add Time Reporters
  - Click “Return to Time Approvers”
  - Click “Save”



Reassign Selected Time Reporters

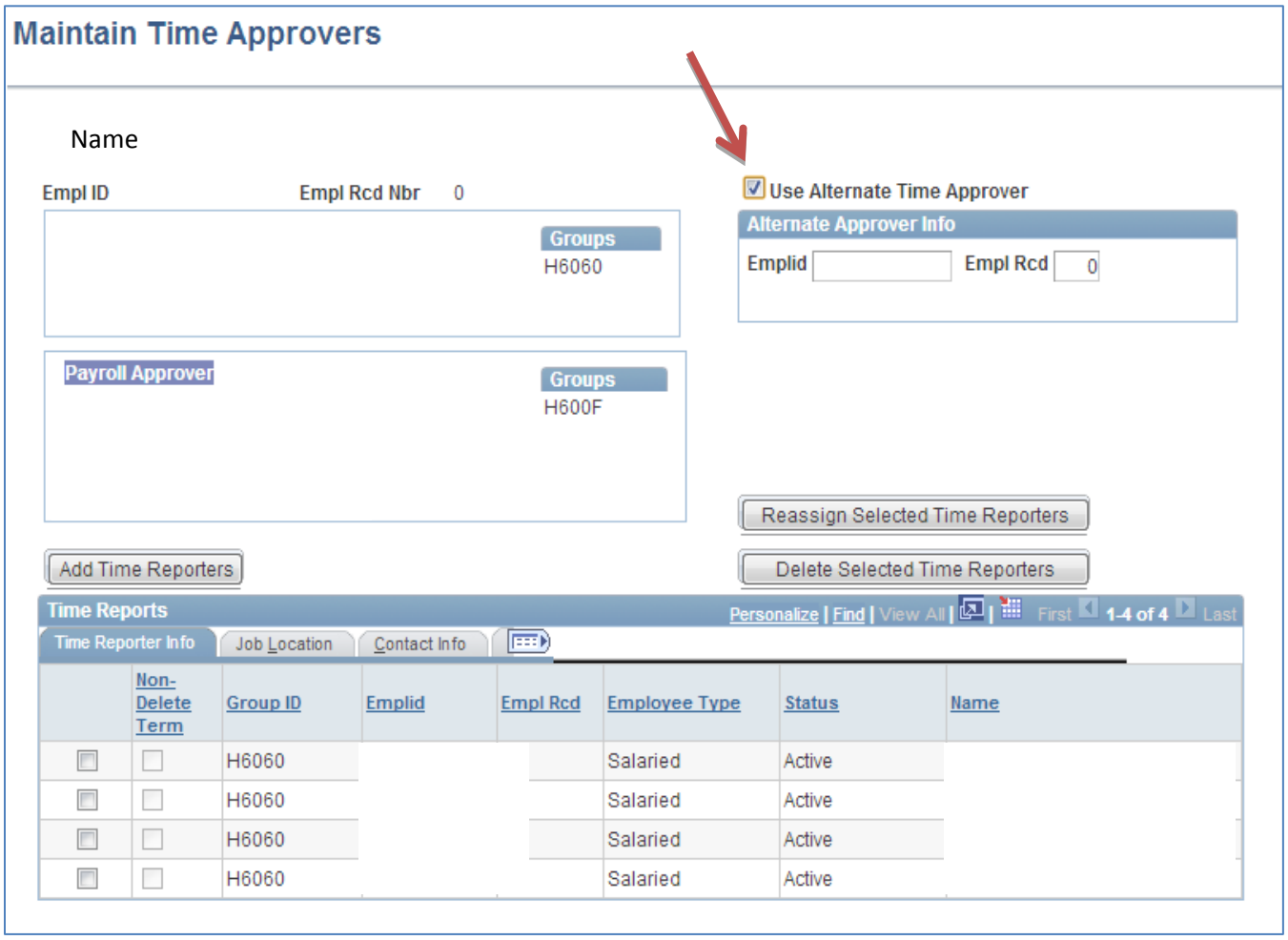
- Reassign Selected Time Reporters
  - Click “Reassign Selected Time Reporters”
  - Enter criteria and search for Time Reporter(s)
  - Check “Add” box to Select Time Reporter(s)
  - Click “Select this Approver for Reassignment”
  - Click “Return to Time Approvers”
  - Click “Save”

- (Note: Do not delete or transfer Time Reporters until all reported time and leave requests have been processed and approved)



Adding Proxies

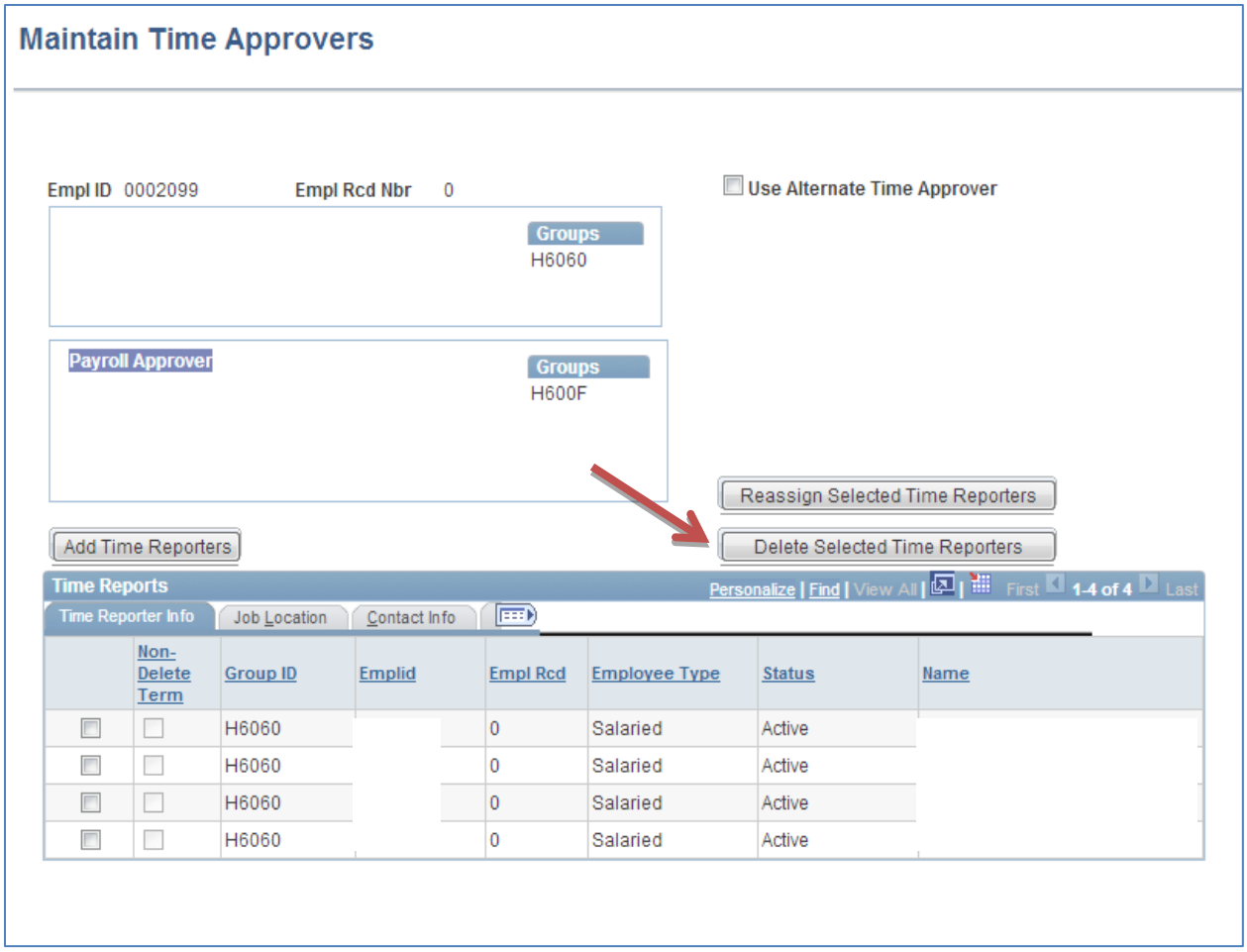
- Manager Self Service > Time Management > Maintain Time Approvers
- Assign Alternate Time Approvers
    - Check "Use Alternate Time Approver"
    - Enter Empl ID of Alternate
    - Click Save
- Alternate users will have the same access as the primary approver. The alternate or proxy will log in using the Group ID of the primary user.



Delete Time Reporters

- Reassign all Time Reporters to a new TA
- Select the Time Approver by clicking the box in the corresponding row
- Click Delete Selected Time Approvers
- The entry will be deleted
- No confirmation will appear

Maintain Time Approvers



MANAGE SCHEDULES

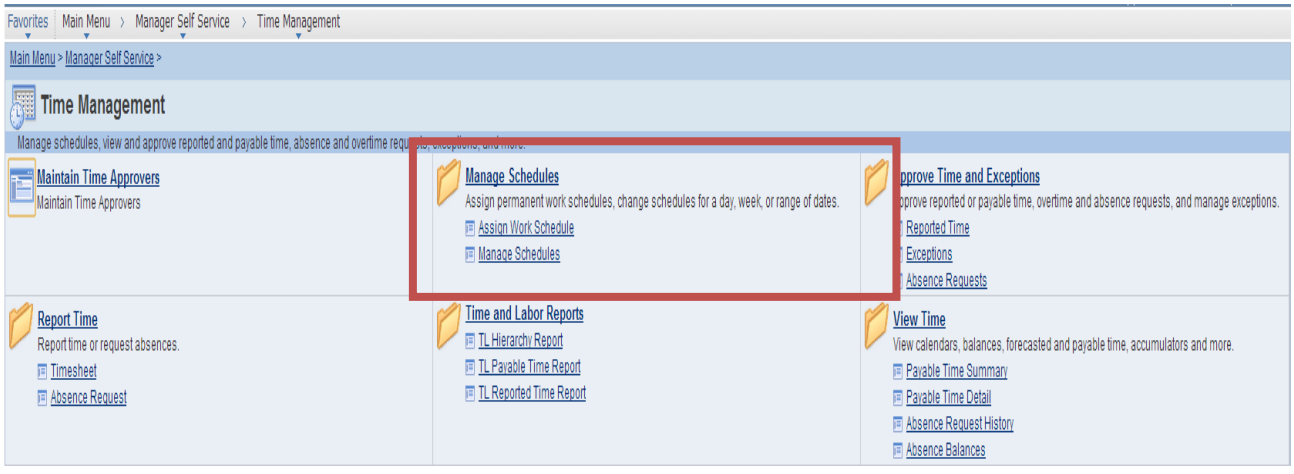
- **Assign Schedules**
- **View Schedules**

- Employees can punch in/out even if they are not assigned to the correct work schedule
- If an employee is not assigned the correct work schedule, then employee will be unable to submit an absence request for a day on when he/she is scheduled to be off
- If you require a schedule that has not already been created, please contact HRMS. (Schedules must equal 40 hours/week)

ASSIGN WORK SCHEDULES

Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

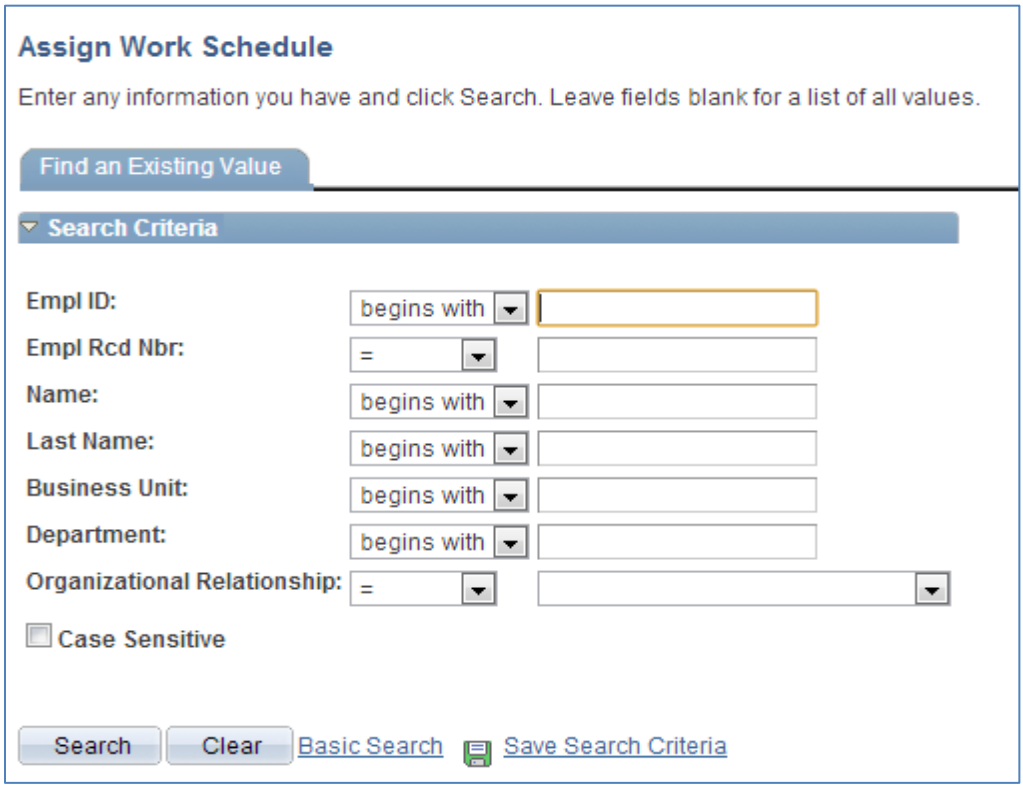
MANAGE SCHEDULES



Under the Assign Work Schedules, TA's are able to assign work schedules.

- Please note: employees' schedules will automatically default into the system
- New employees' schedule will be uploaded based on their department
- The TA will only have to utilize the Assign Work schedule option if the schedule changes
- All employees will have schedules for the following reasons
    - This field is required
    - Absence Management
    - Time Reporting for Benefit Eligible Bi-weekly employees

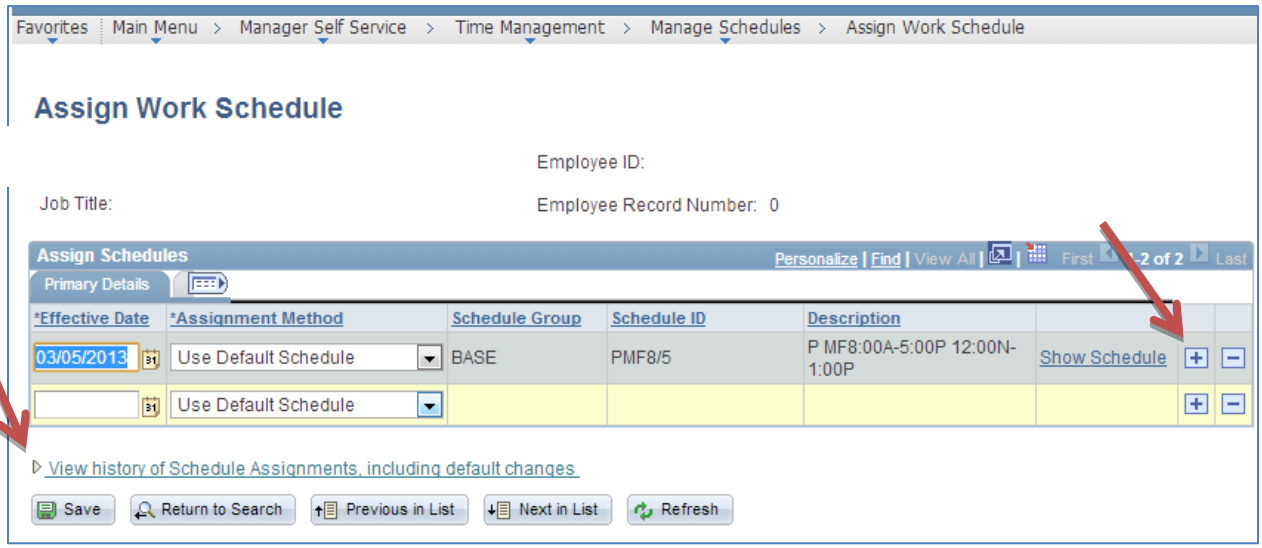
To assign a new work schedule, start by selecting the employee by entering the Empl ID or employee name.



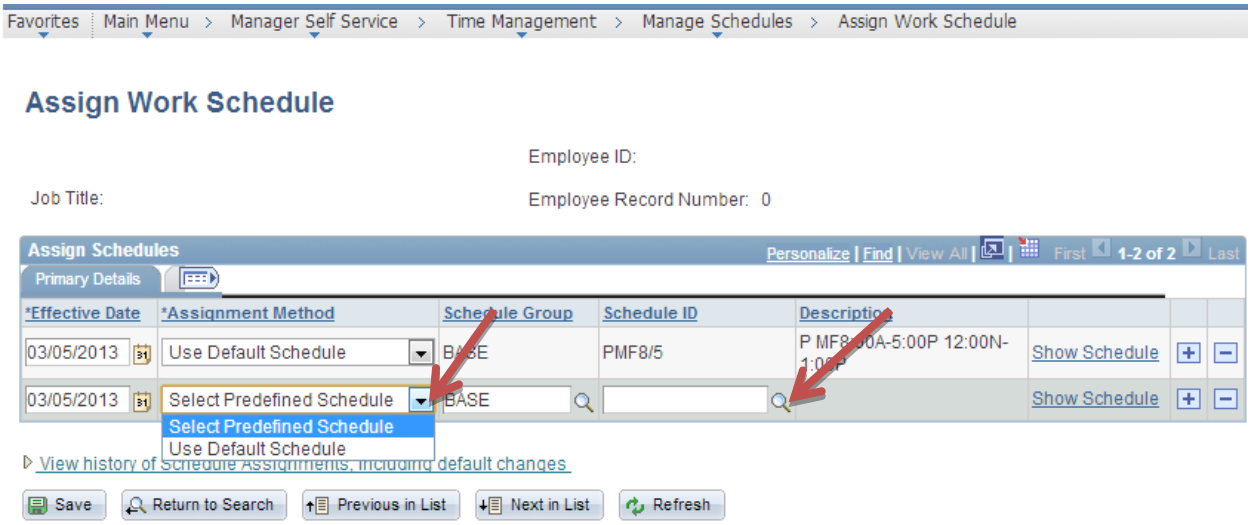
Once the employee is selected…

- Click the plus sign to insert a new row. The effective date should be the beginning of a new pay period.
- To view past schedules, click on "view history of scheduled assignments"
    - E=Elapsed time (salaried employees schedule)
    - P=Punch time (hourly employees schedule)
- New employees will have their schedule automatically added depending on their department

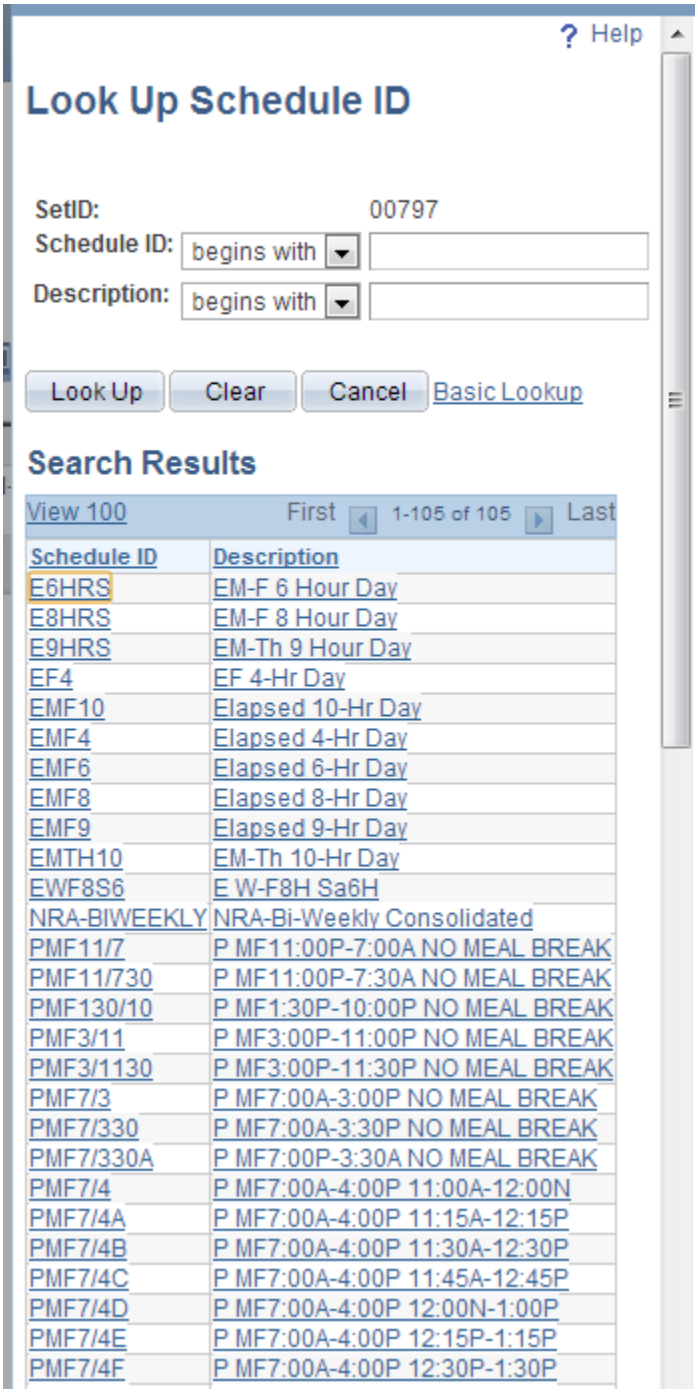
- Employees will always be able to check in even if the schedule is not correct
- For Benefit Eligible bi-weekly employees, missed punches and late punches when punching into work will cause an exception
- Employees will be paid based on a rounding scale of when they punch in and punch out



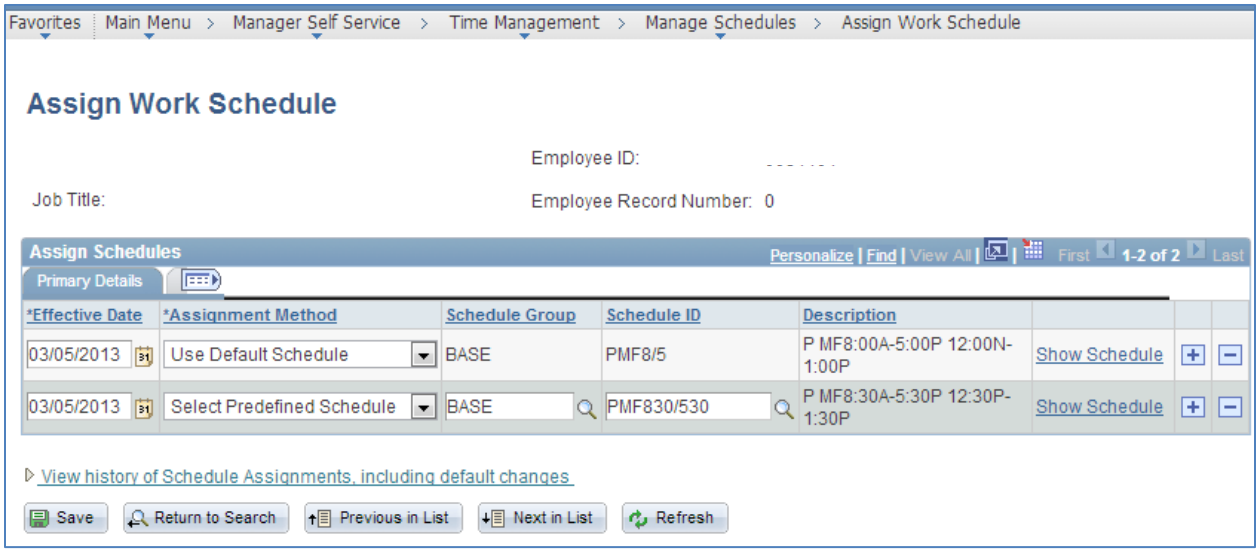
- Multiple lines can be added for future schedules. From the drop down menu, click Select Predefined Schedule. This will open up the Schedule Group and Schedule ID fields.



- Click the magnifying glass to open up a list of schedules. You can search by description or scroll down to select the correct schedule. Click on the schedule that you wish to add. If you do not see the correct schedule, email HRMS to create a customized schedule.
- Click on Schedule ID to view the schedule that shows off days and hours scheduled for each day.
    - E=Elapsed time (salaried employees schedule)
    - P=Punch time (hourly employees schedule)
- Temporary bi-weekly employees will not need to have a specific schedule; they will have a default schedule. Nothing will be tied to the schedules. Rules will not be associated and exceptions will not be created for temporary employees.
- To delete a schedule, click the minus sign
    - Schedules can only be deleted if they are under a future effective date



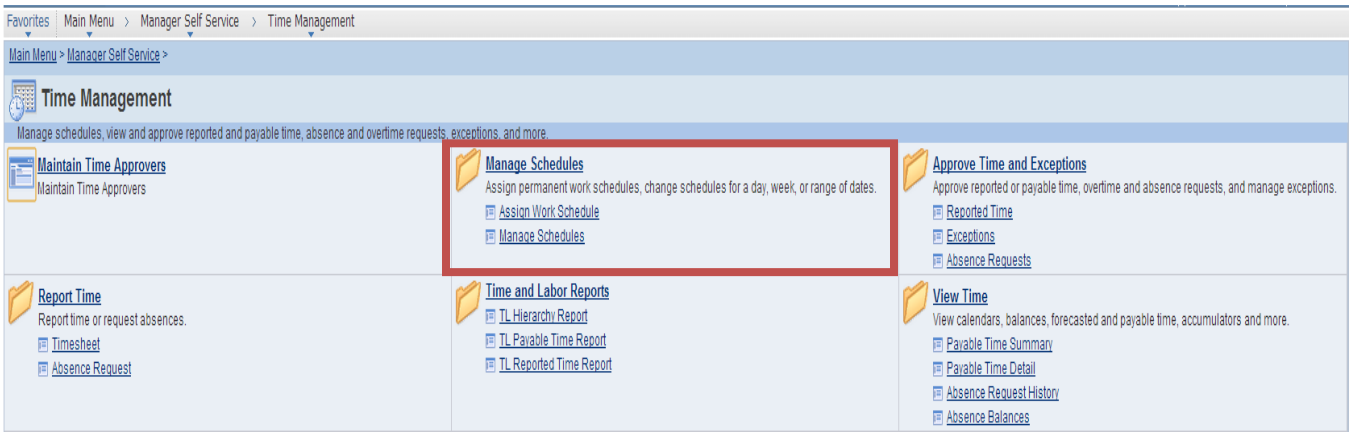
This will now be the default schedule for the employee. If the schedule needs to be changed back, a new entry will need to be added. Click “Save”

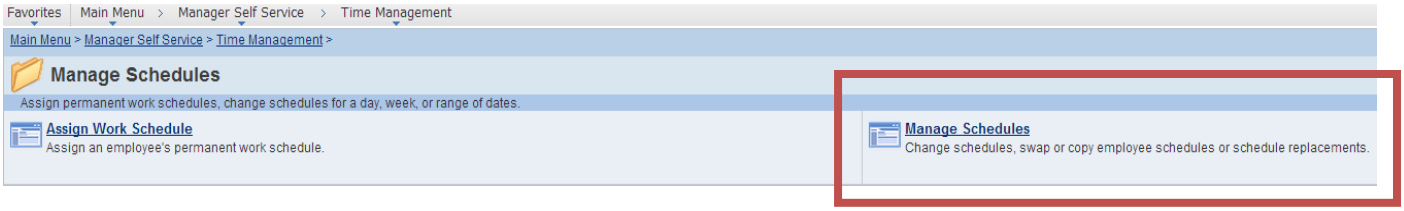


MANAGE SCHEDULES

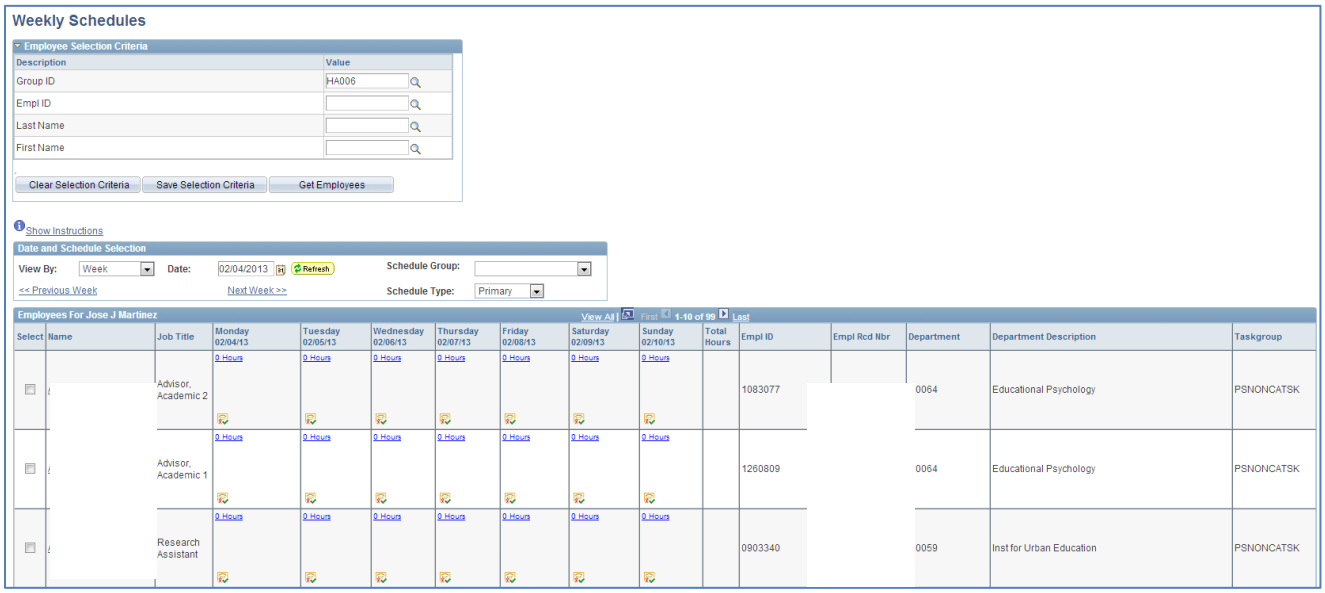
To view an Employees' Schedule that includes planned absences, holidays, and scheduled days off:

Manager Self Service > Time Management > Manage Schedules > View Schedules



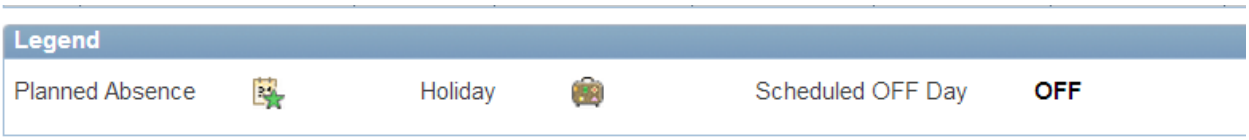


- View Schedules by entering in a group id or Empil ID.
- You are able to view the employee, job title, schedule and requested leave.



View Schedule Key

This view includes a key at the bottom of the page that includes the icons on the calendar.



ABSENCE REQUESTS

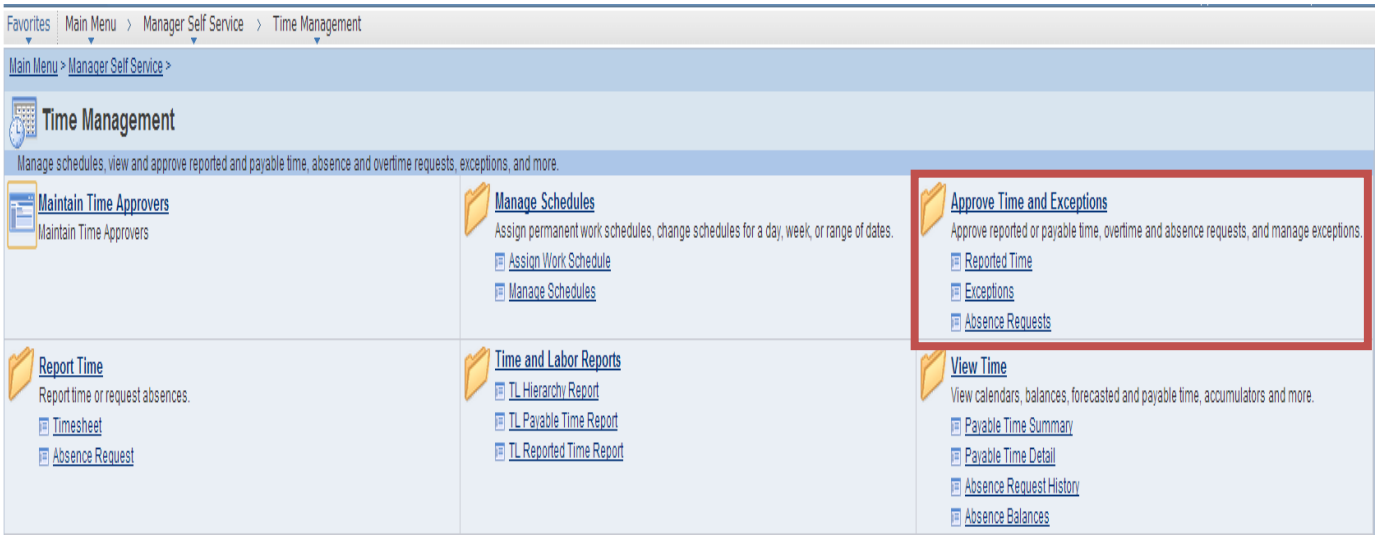
- **Approve**
- **Adjustments**
- **Submitting on behalf of an Employee**
- **View**

WORKFLOW

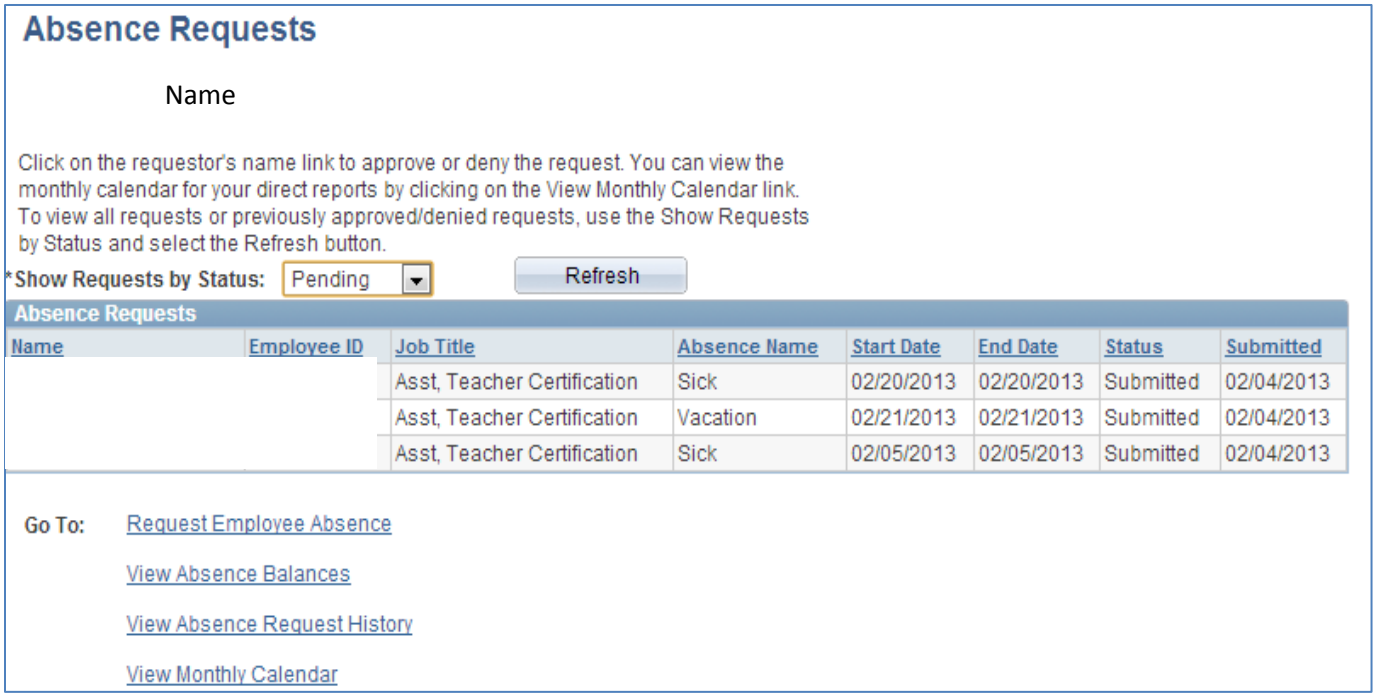
- Employee initiates the workflow by submitting an Absence Request
- If the employee has enough hours, the system will allow the employee to successfully submit the request, if not, it is denied.
- The absence request is sent to the Time Approver (TA). The following roles have the ability to approve the Absence Request
    - The TA and TA Alternate
    - The PA and PA Alternate
- The Time Approver has the ability to:
    - Approve: The Absence Request is only approved once. Once it is approved, it is final and becomes approved payable time.
    - Deny: The approver can deny the request, whereby the employee would need to go back and re-enter a new request
    - Push Back: The approver can push back the request to the employee to edit, update, or cancel.
- Any changes after the Absence Request is approved are completed on the timesheet by the Time Approver (TA)

To Approve Absence Requests

Manager Self Service > Time Management > Approve Time and Exceptions > Absence Request

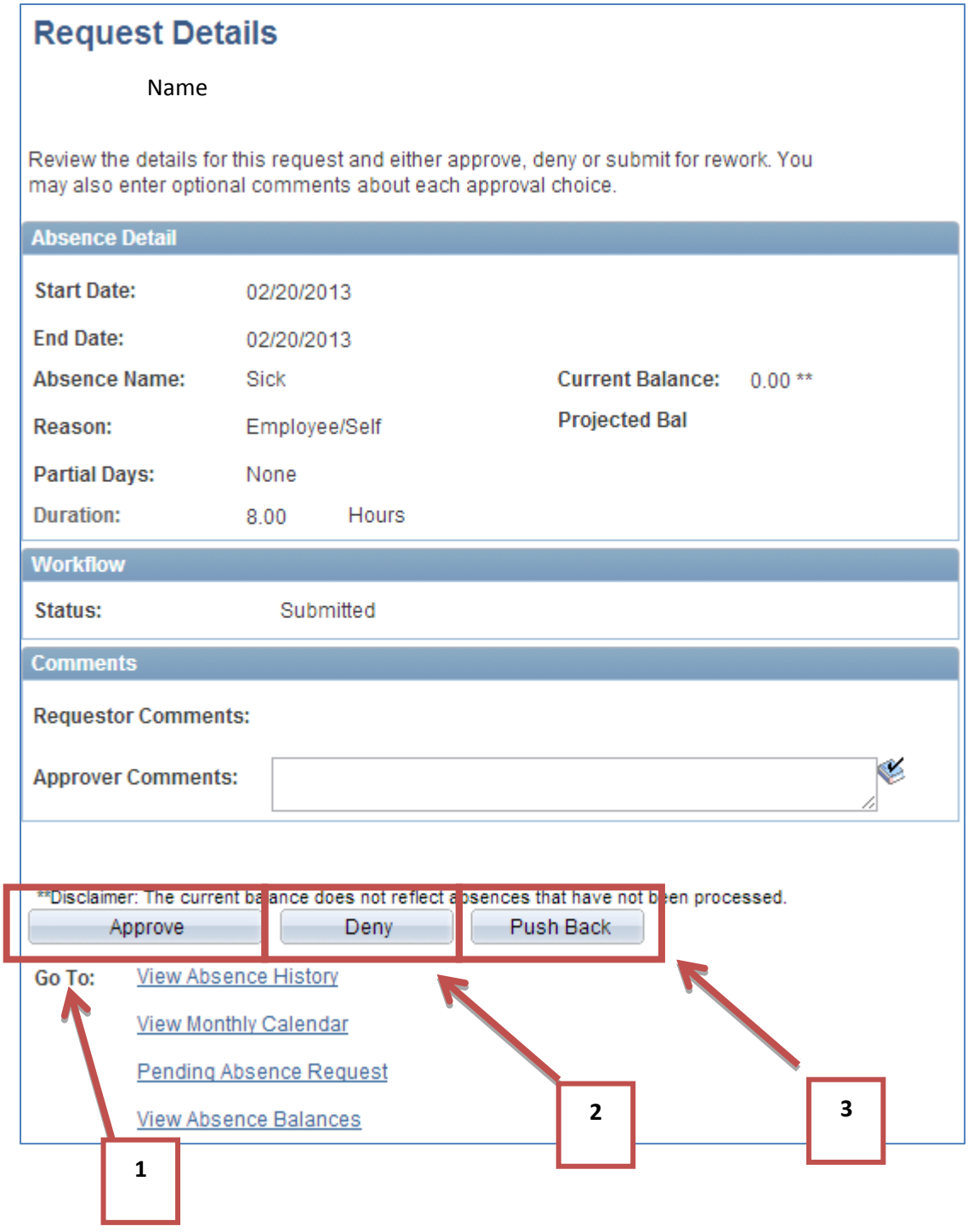


- Click onto Absence Requests to view the pending absence requests for your employees.
- The page displays the name of the employee, employee ID, job title, type of absence, the start and end date and when the request was submitted.
- To view the details and take action on the request, click on the employee's name.



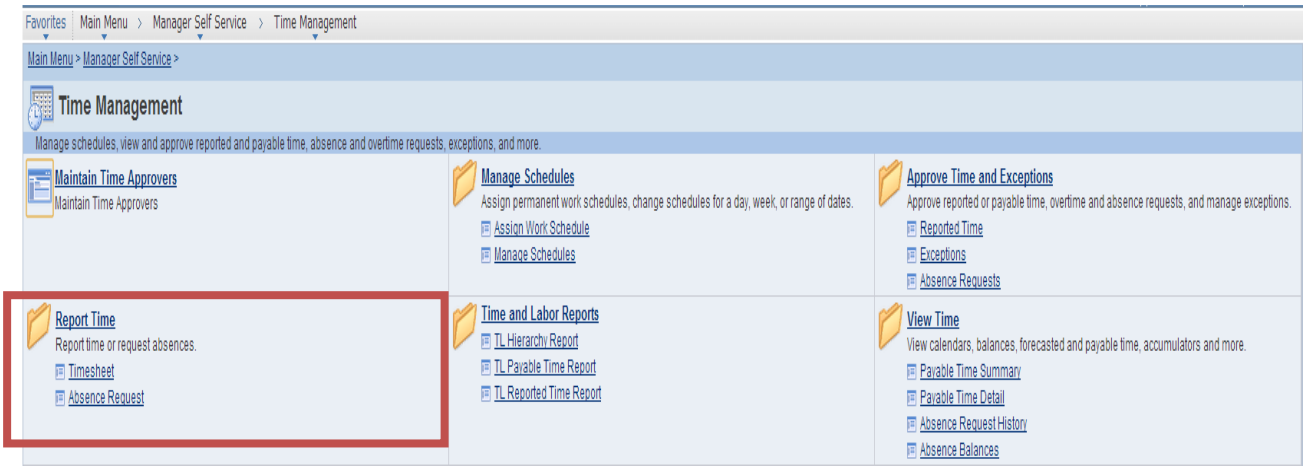
- Once you click on the employee's name, you will be able to review the details for this request.
    - This will also show the current and projected balance of leave for the employee.
- In this view, you are able to take action on this request which includes approving, denying or pushing the request back.
    - An email will be sent to the Time Approver and the Alternate and the Payroll Approver and Alternate
    - An Absence Request only has to be approved by the Time Approver
    - **Approve** (1): will approve the request. No other action can be taken. If the Absence Request needs to be modified, the TA will have to create an Absence Adjustment on the employee's electronic timesheet.
    - **Deny** (2): will deny the request. No other action can be taken.
    - **Push Back** (3): will send the Absence Request back to the employee. The employee is then able to edit and make corrections to the form and resubmit or cancel the request.
    - An email will be sent to the employee after any action is taken on the Absence Request
- For any comments, you can add them in the approver comments field.
    - Comments should be provided if request is denied or pushed back.

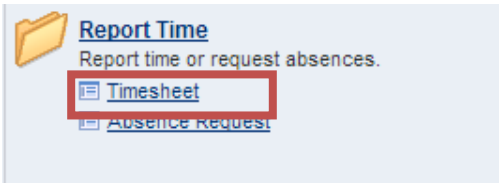
- Current Balance reflects the hours that the employee currently has available and includes any hours pending
    - For example, if an employee currently has 40 hours, but has an approve absence request for 16 hours next month, and has an absence request pending for 8 hours:
        - Current balance: 16 hours
- If an absence request is for a future month, a Projected Balance displays, which includes the current balance plus projected leave accruals for the future months


Request Details
Name
Review the details for this request and either approve, deny or submit for rework. You may also enter optional comments about each approval choice.
Absence Detail
Start Date: 02/20/2013
End Date: 02/20/2013
Absence Name: Sick
Current Balance: 0.00 **
Reason: Employee/Self
Projected Bal
Partial Days: None
Duration: 8.00 Hours
Workflow
Status: Submitted
Comments
Requestor Comments:
Approver Comments:
**Disclaimer: The current balance does not reflect absences that have not been processed.
Approve
Deny
Push Back
Go To:
View Absence History
View Monthly Calendar
Pending Absence Request
View Absence Balances
1
2
3

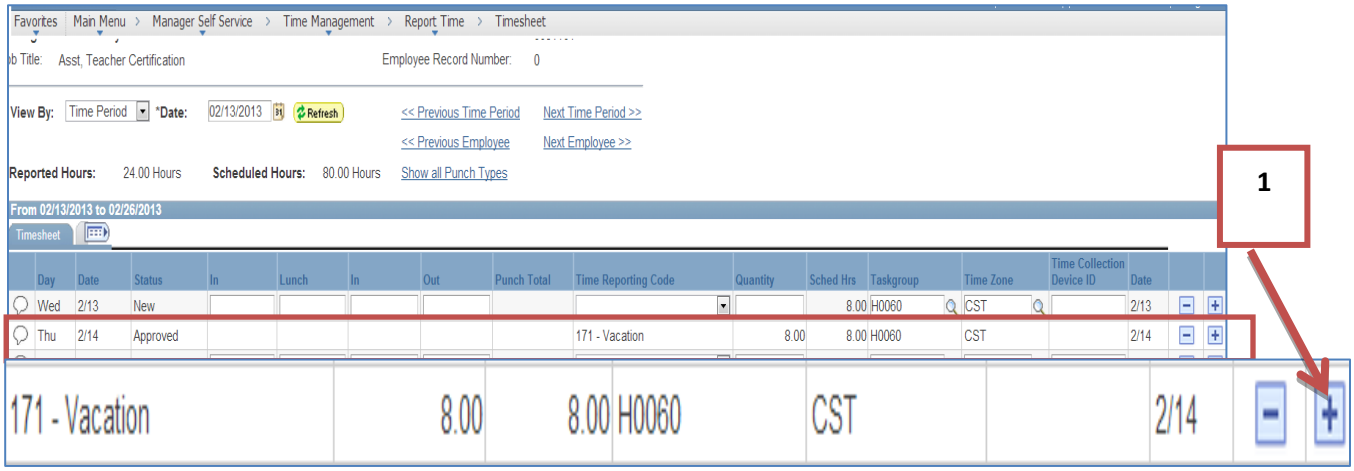
ABSENCE REQUEST CORRECTIONS

Manager Self Service > Time Management > Report Time > Timesheet



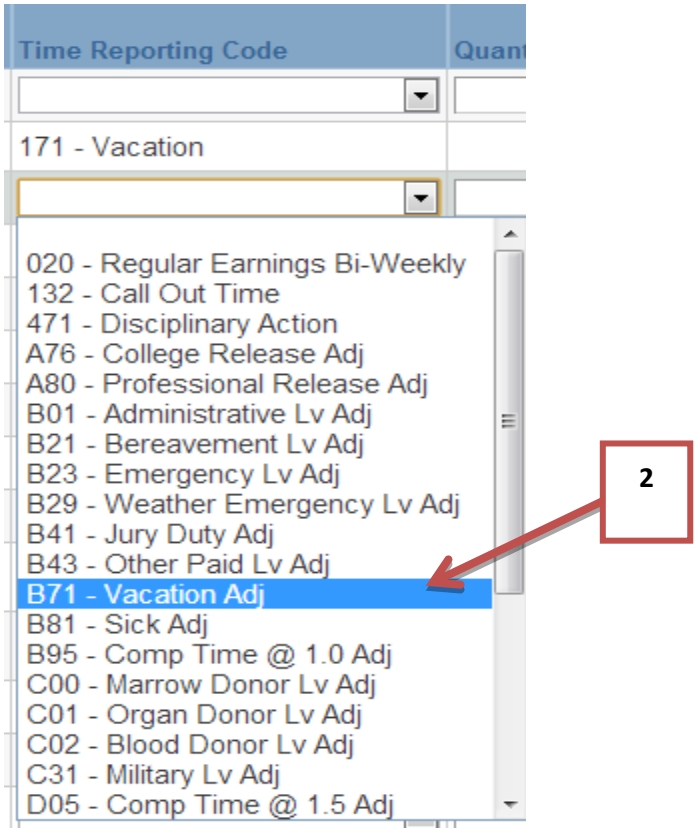


- Delete or correct on the employee's Timesheet. If the absence request has already been approved, the time must be corrected on the timesheet.
- Absences on the timesheets are view only; they must be adjusted by adding additional entries
- Click on the plus sign on the row where you wish to correct the time. This will add a row below the entry. (1)

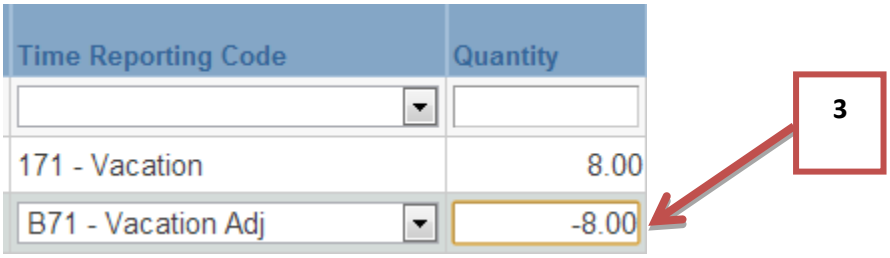


- Select the correct Time Reporting Code (TRC) from the drop down menu.

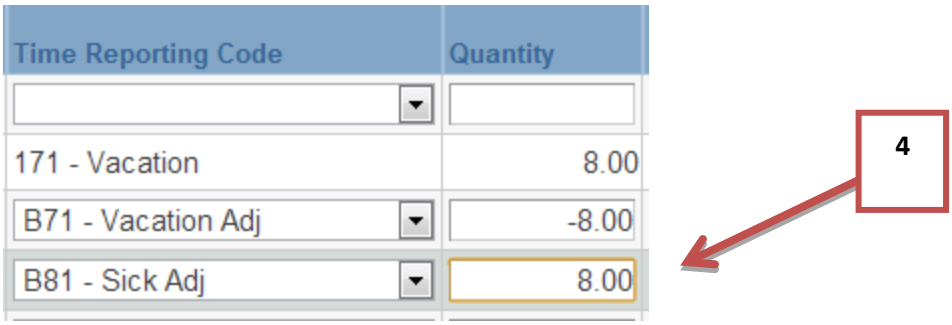
- For a vacation correction, select B71-Vacation Adj. (2)



- In the quantity field, select the number of hours to reverse. (3)
  - This time will need to be negative since you will be taking away the hours.

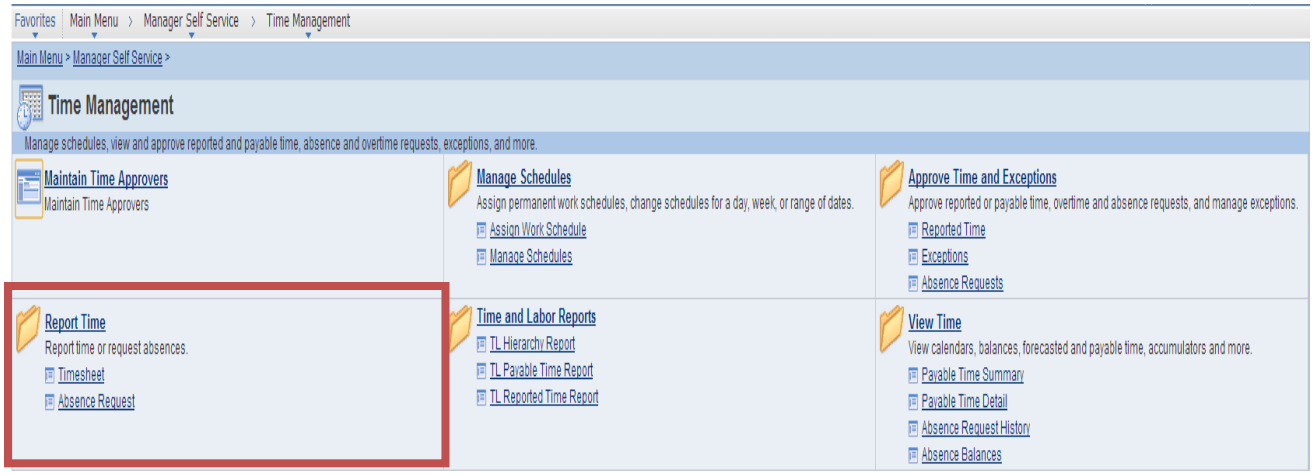


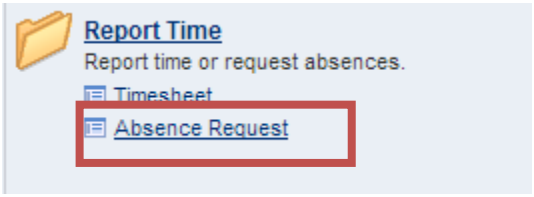
- To correct the type of leave, click the plus sign to add an additional row for a new entry.
- Add the correct TRC.
  - If it is a correction from vacation hours to sick hours, select the TRC B81-Sick Adj.
- Add the hours for the new leave; this number will be positive. (4)



CREATING AN ABSENCE REQUEST ON BEHALF OF AN EMPLOYEE

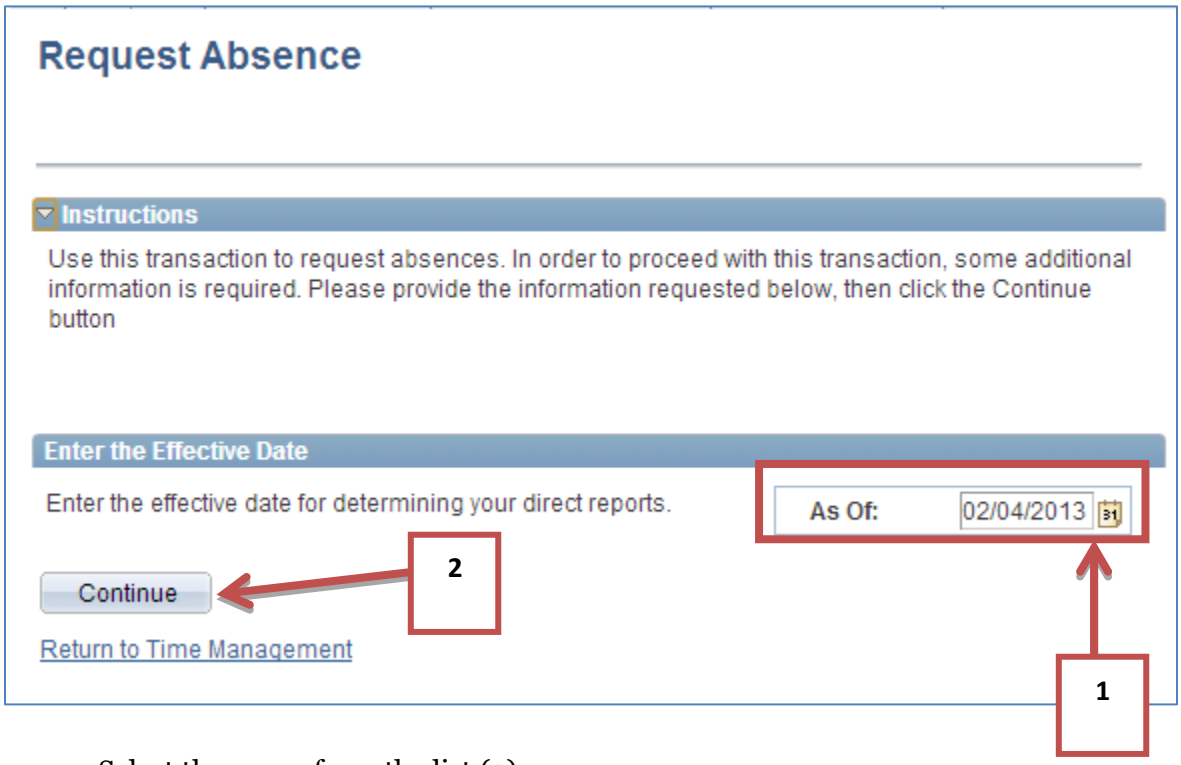
Manager Self Service > Time Management > Report Time > Absence Request





- When submitting absence requests, the end date should be the last day of the leave request
- If an employee is not assigned the correct work schedule, the employee will be unable to submit an absence request for a date on when he/she is scheduled to be off. Please ensure that your employees are assigned the correct work schedule.

- With the Absence Request, you are able to add requests for employees.
- Enter today's date (1)
- Click continue (2)



- Select the group from the list (3)
    - Only one group can be selected at a time

Request Absence

Select a Group to Process

Instructions

On this page, you'll select the Group ID that defines the group of employees from which you can select the employee(s) to process.
Listed below are all of the Groups that specify as the Group Manager.

3

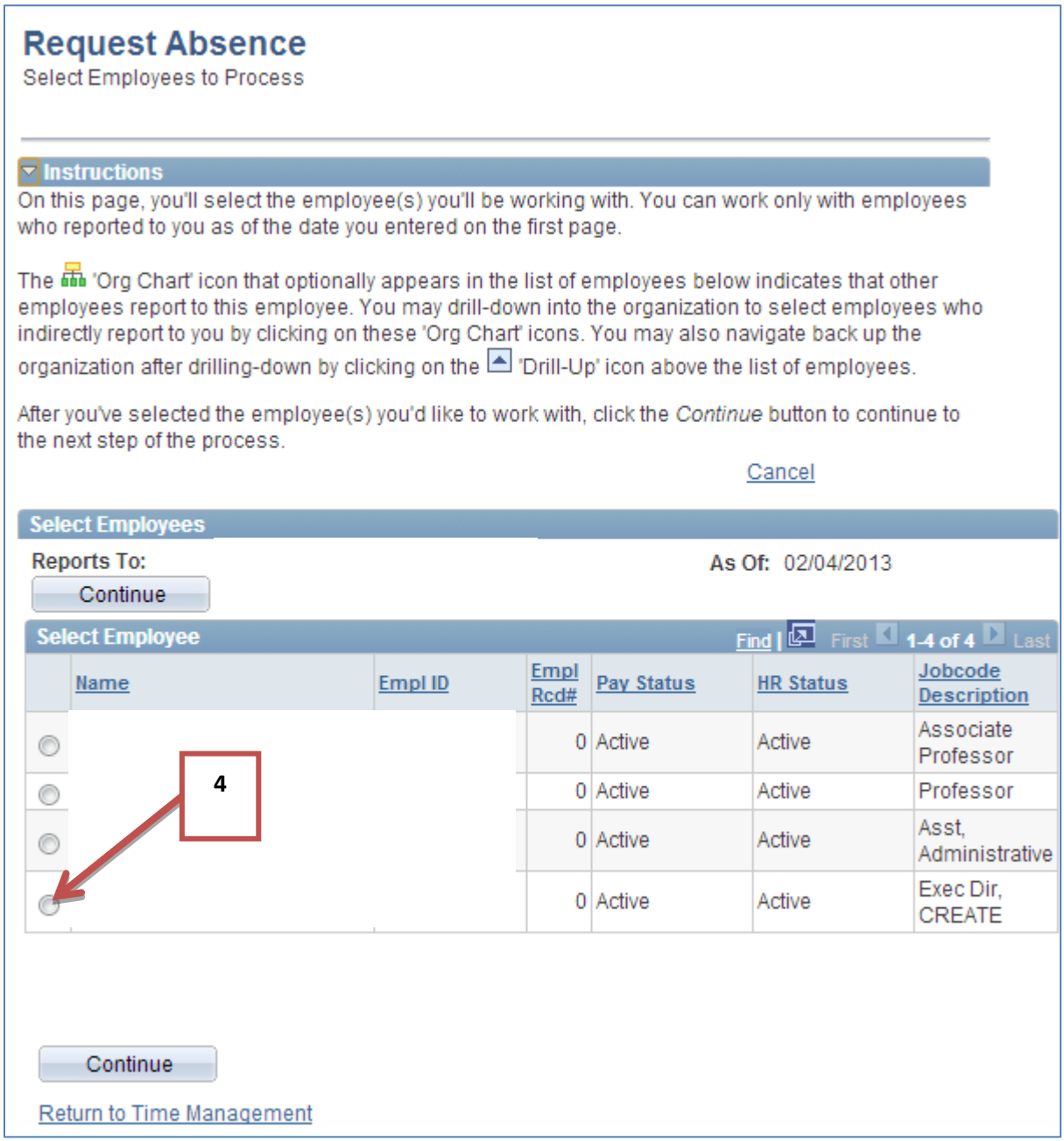
Select a Group

Select Group

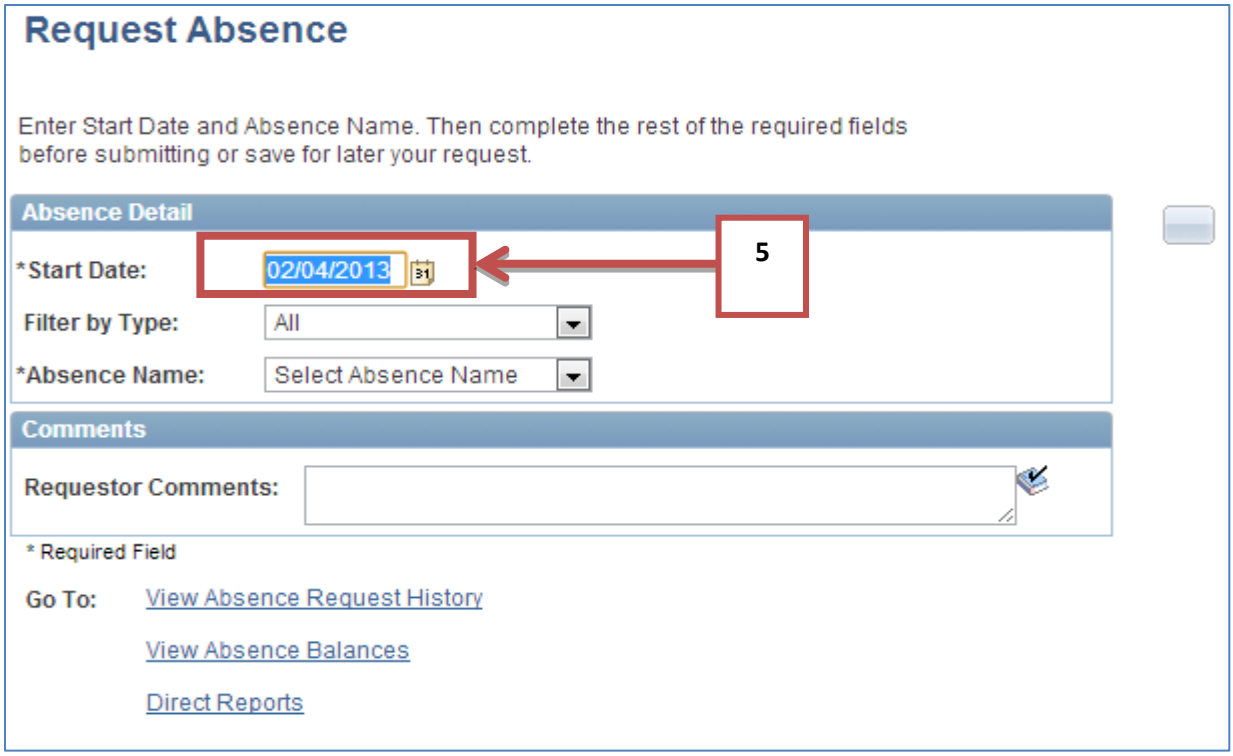
HA010	H0058 0852221 TA
HA011	H0058 0085895 TA
HA012	H0058 1152489 TA
HA013	H0058 0090361 TA
HA014	H0058 0191261 TA
HA015	H0062 0082051 TA
HA016	H0058 0881298 TA
HA031	H0060 0088971 TA
HA050	H0062 0152133 TA
HA051	H0062 0082106 TA
HA052	H0062 0083874 TA
HA053	H0062 0092183 TA
HA054	H0062 0081146 TA
HA055	H0062 0081562 TA
HA056	H0062 0089635 TA
HA057	H0062 0082437 TA
HA059	H0062 0084674 TA
HA05A	H0062 0144155 TA
HA05B	H0062 0175602 TA
HA05C	H0062 0696873 TA
HA05D	H0062 0081539 TA
HA061	H0063 0082162 TA
HA062	H0063 0162819 TA
HA073	H0064 0090572 TA
HA074	H0064 0082441 TA
HA086	H0065 0081136 TA
HA111	H0296 0093039 TA

Continue Cancel

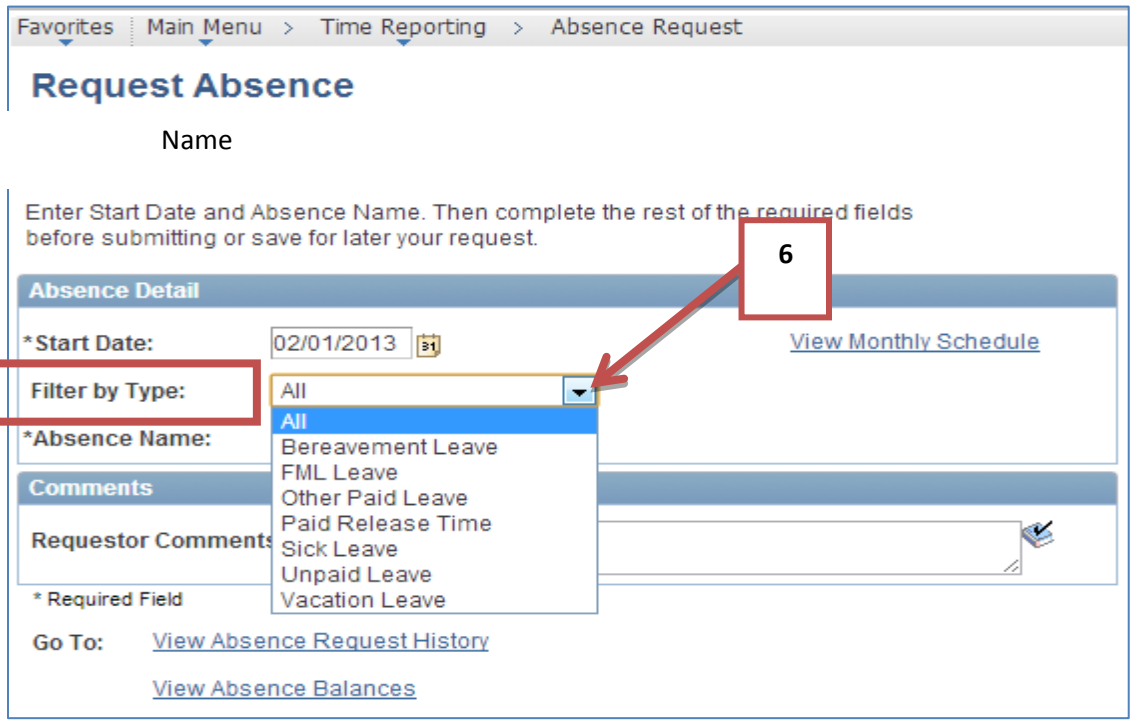
- Select an employee (4)
    - Once again, only one employee can be selected at a time



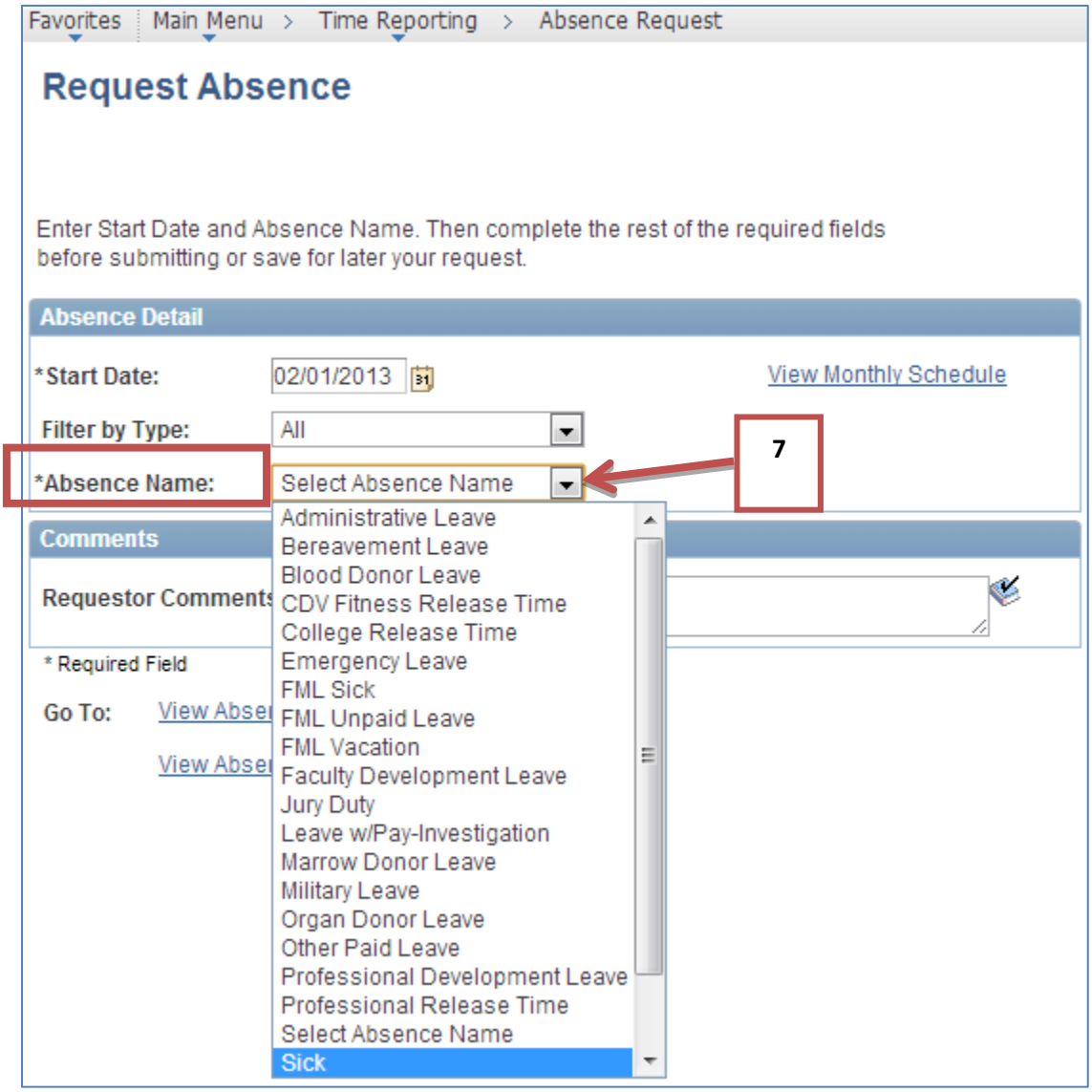
- Create a Leave Request by selecting the start date and selecting the type of absence (5)



- Through this system, you can filter the types of absences by the drop down menu to "Filter by Type" (6)
    - This will only show the absence types associated with this type of leave

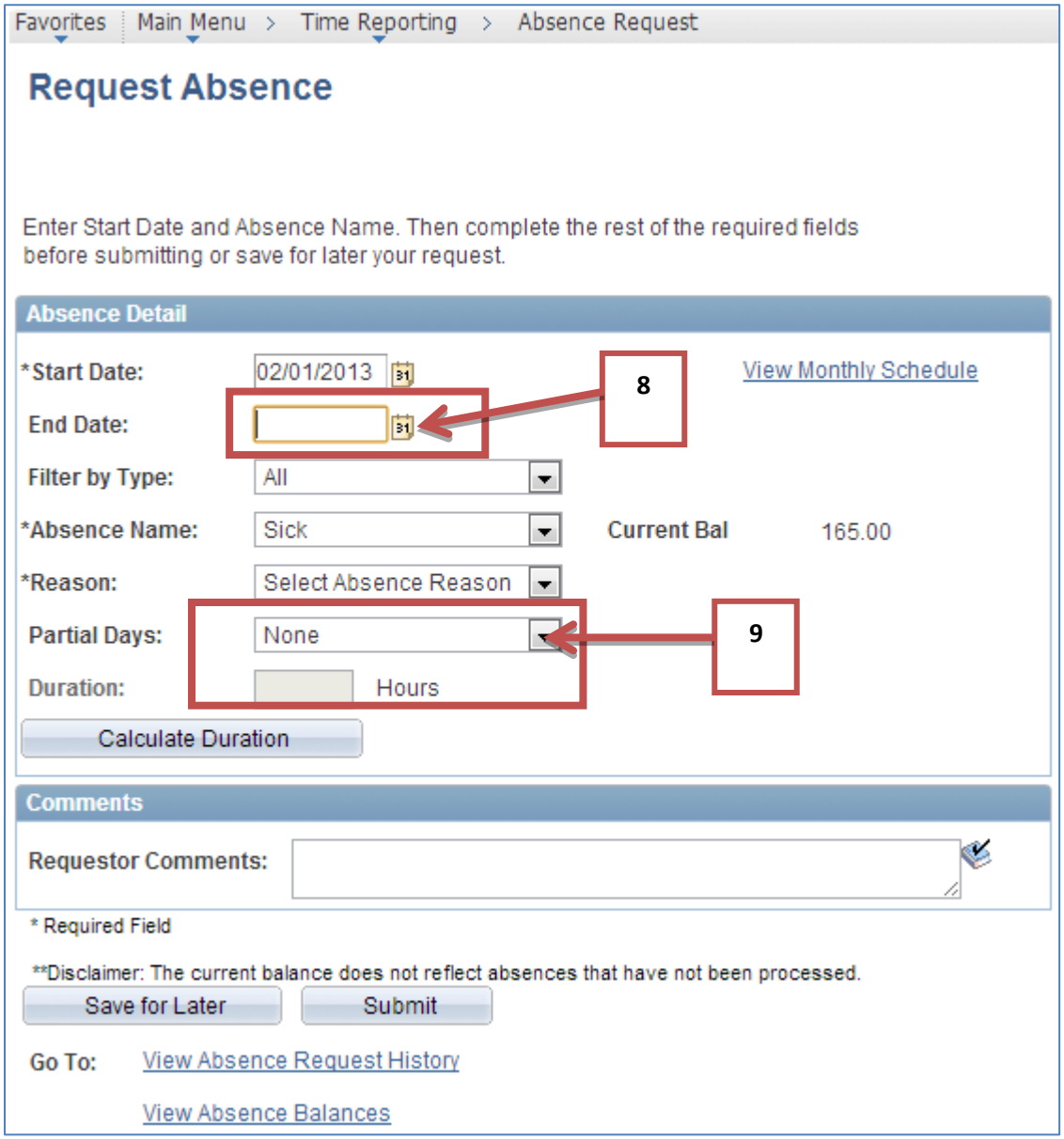


- Or you can simply select the type of leave you wish to request by selecting from the "Absence Name" drop down menu (7)
    - This menu will include all absence types

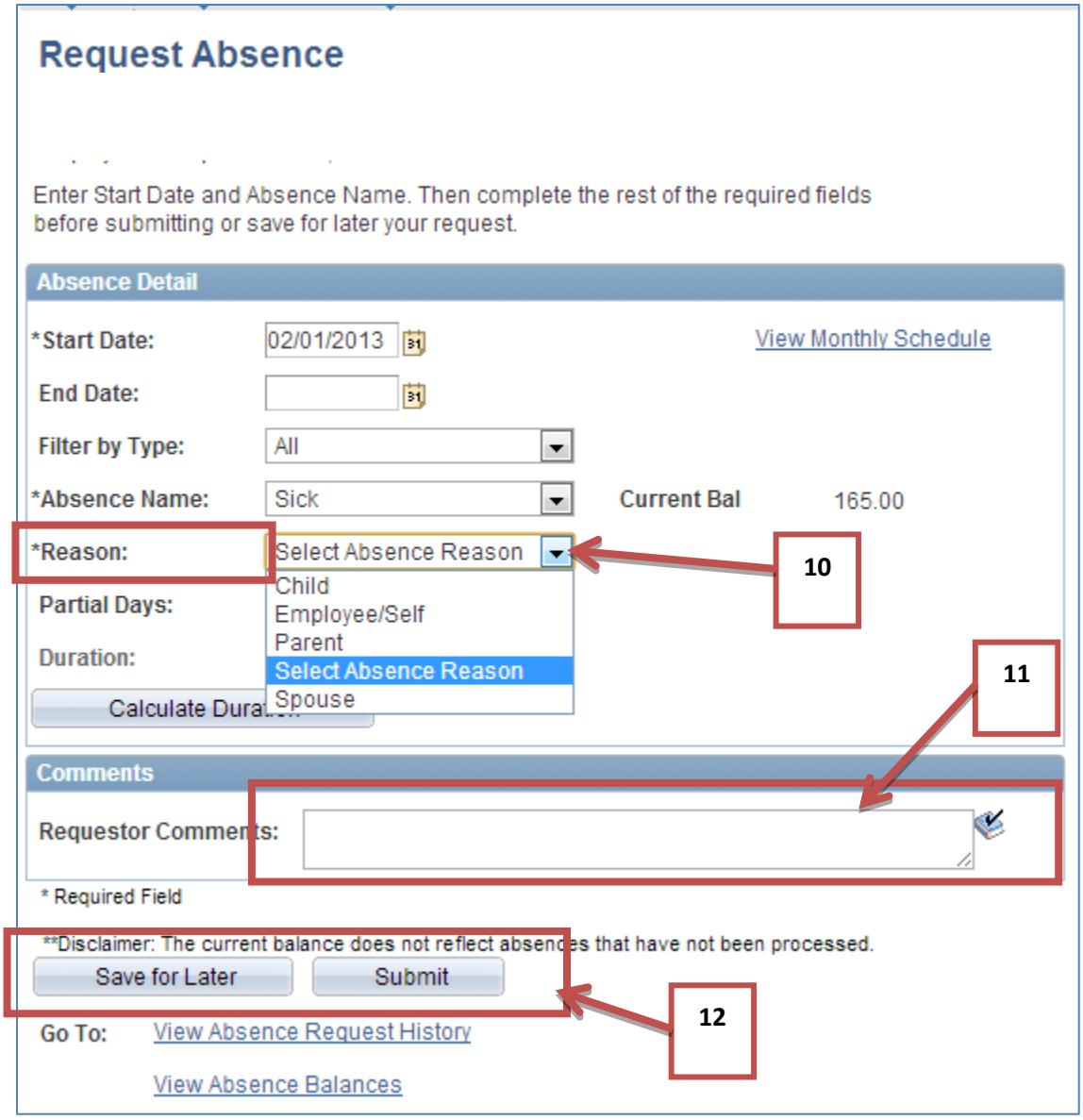


- Select the type of absence; multiple fields will open on the form.
- Complete the required fields that include the end date of the absence as well as if partial days will be taken.
    - To complete the end date, (8)
        - Enter the last day of the employee's leave in the field with the MO/DY/YEAR format

    - Click on the calendar icon and select the date
- If there are partial days, you will need to indicate what days will be partial days and enter the hours that will be missed in the duration field. (9)



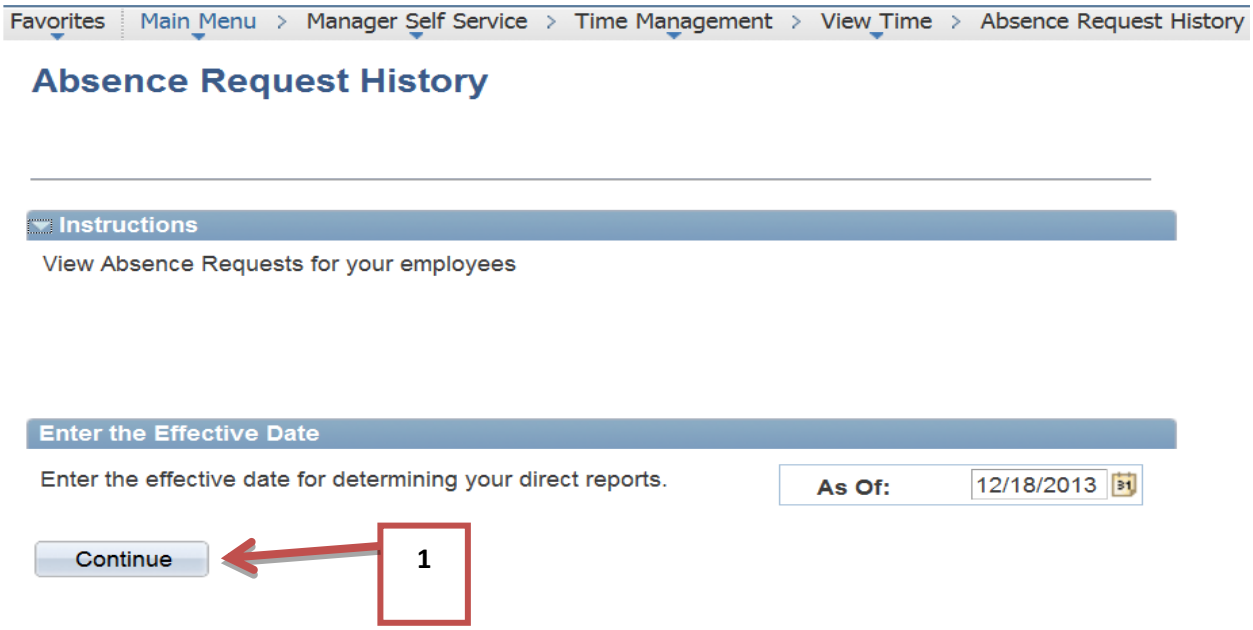
- Multiple absence types will require an additional reason. (10)
    - As an example, for sick days, you will need to indicate if it is for you, a spouse, a child, or a parent
- If there is additional information needed, you can add it to the comments field (11)
- After you complete the information requested, you can save for later or submit it. (12)



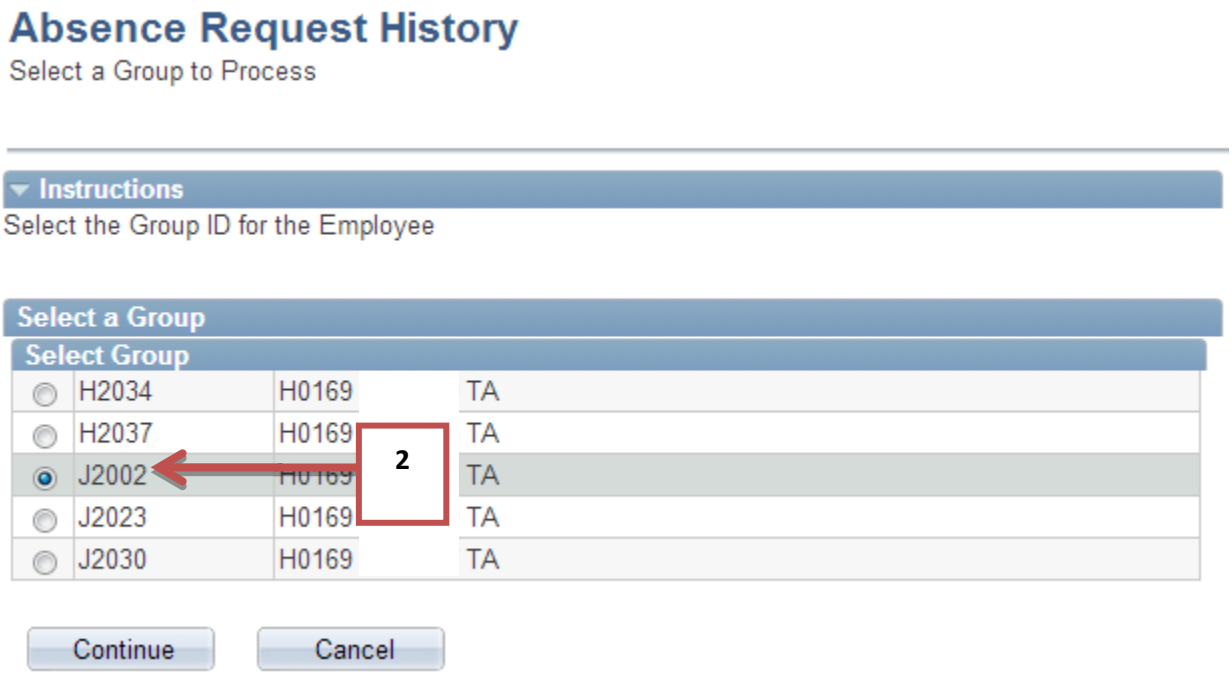
- When you submit the form, you will receive a confirmation
- Click "OK" (13)
- This absence will be automatically approved

To View an Absence Request

Manager Self Service > Time Management > View Time > View Absence Request History



- Click Continue to select your employees or the appropriate Group ID of Employees (1).



- Select the appropriate Group ID and click Continue (2).
- Select the appropriate Employee to view Absence Request History (3).

Absence Request History

Select Employees to Process

Instructions

On this page, you'll select the employee(s) you'll be working with. You can work only with employees who reported to you as of the date you entered on the first page.

The 'Org Chart' icon that optionally appears in the list of employees below indicates that other employees report to this employee. You may drill-down into the organization to select employees who indirectly report to you by clicking on these 'Org Chart' icons. You may also navigate back up the organization after drilling-down by clicking on the 'Drill-Up' icon above the list of employees.

After you've selected the employee(s) you'd like to work with, click the *Continue* button to continue to the next step of the process.

Cancel

Select Employees

Reports To: **As Of:** 01/02/2014

Continue

Select Employee Find | First 1-6 of 6 Last

	Name	Empl ID	Empl Rcd#	Pay Status	HR Status	Jobcode Description
◉			0	Active	Active	Police Sergeant
○			0	Active	Active	Police Sergeant
○			0	Active	Active	Police Officer
○			0	Active	Active	Police Officer
○			0	Active	Active	Police Sergeant
○			0	Active	Active	Police Corporal

3

Continue

Corrections to Reported Time

Manager Self Service > Time Management > Report Time > Timesheet

- Review time
- Make corrections if necessary

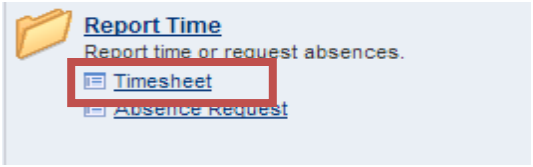
  There are a few instances when a correction is needed on a timesheet. These corrections include:

  - **Missed punch**: When the employee misses a required punch, it is the TA responsibility to enter the correct punch
  - **Call out time**: When an employee returns to work and does not work the minimum number of department call-out hours, it is the responsibility of the TA to enter the additional time required on the timesheet.
  - **Disciplinary Action**: If an employee is off work due to disciplinary action, it is the TA responsibility to record this in TRAM
  - **Off-Campus work** (i.e. campus training): If an employee is working off campus, such as offsite training, the TA will record the employee's time in the system
  - **Leave time corrections:** Corrections to absence requests after they have been approved must be adjusted by the TA on the timesheet
  - **Reg Hrs**, except as described above, and **Holidays** should ***NOT*** be changed

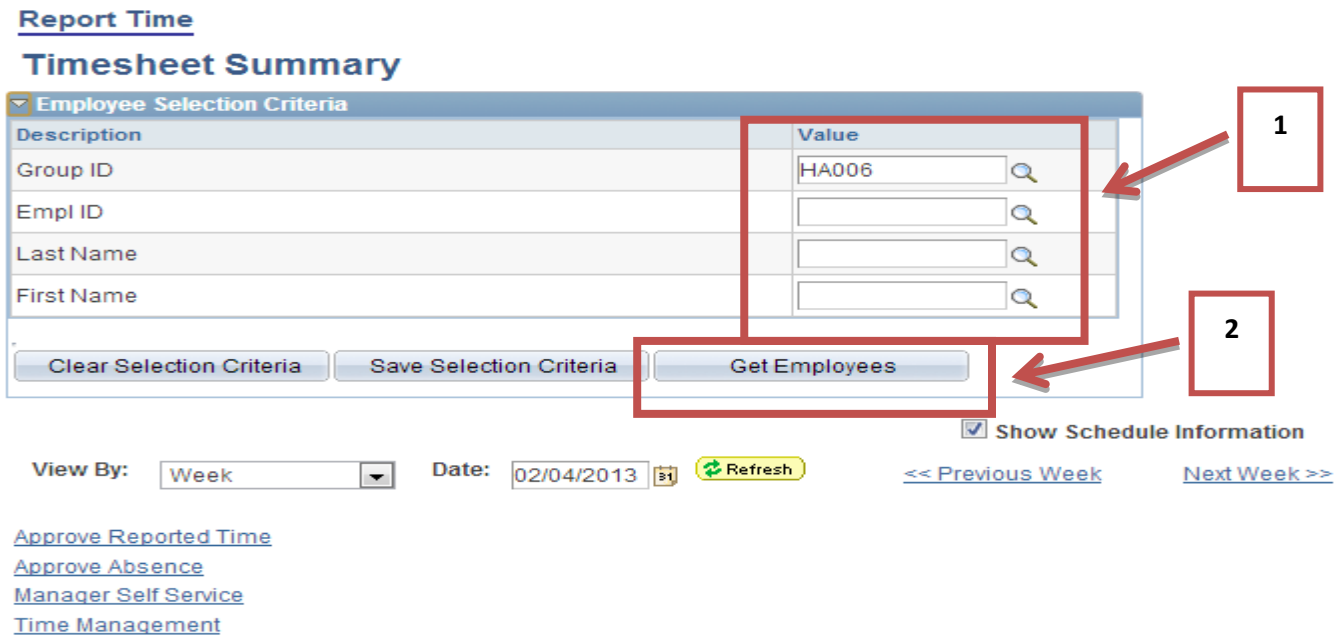
  When such an instance occurs, it becomes unapproved reported time and must be "reapproved" as reported time by the Time Approver. It is imperative that the reported time be approved before the Time Administration process is run. Time Administration is the process that converts the approved reported time into unapproved payable time that needs to be approved by the Payroll Approver.

  Auditing will occur to view any changes to timesheets. It is important that any corrections to the timesheet are accompanied by a comment regarding the reason for the adjustment.

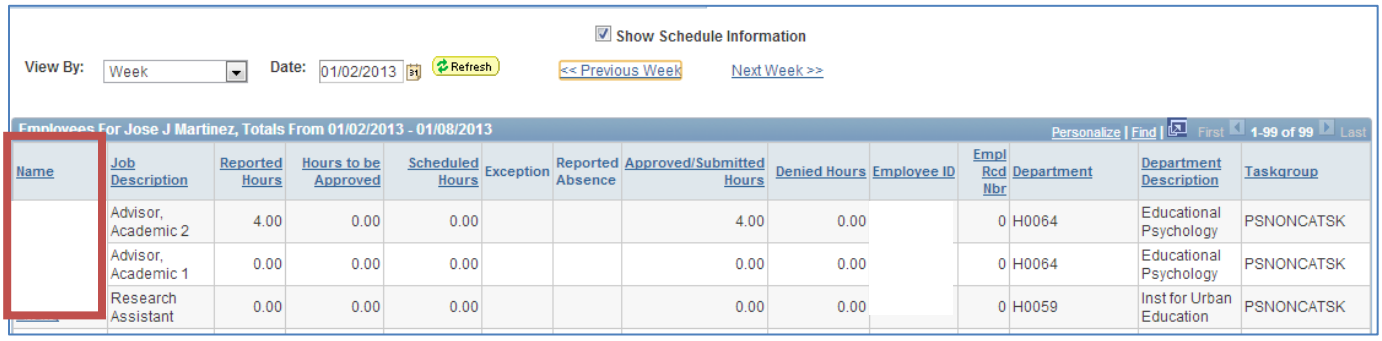
- Approve the unapproved reported time



- Look up data by Group ID, Empil ID or employee name (1)
- Enter the information
- Click Get Employees (2)

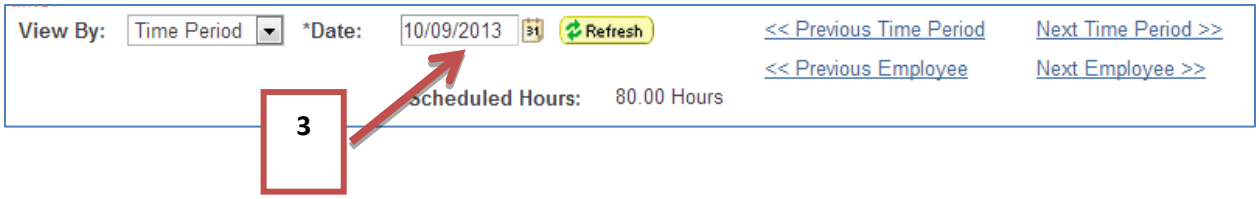


- It will bring up a list of employees and a snap shot view of their reported hours, hours to be approved, scheduled hours, approved hours, denied hours
- Click on the Employee Name to access the timesheet.

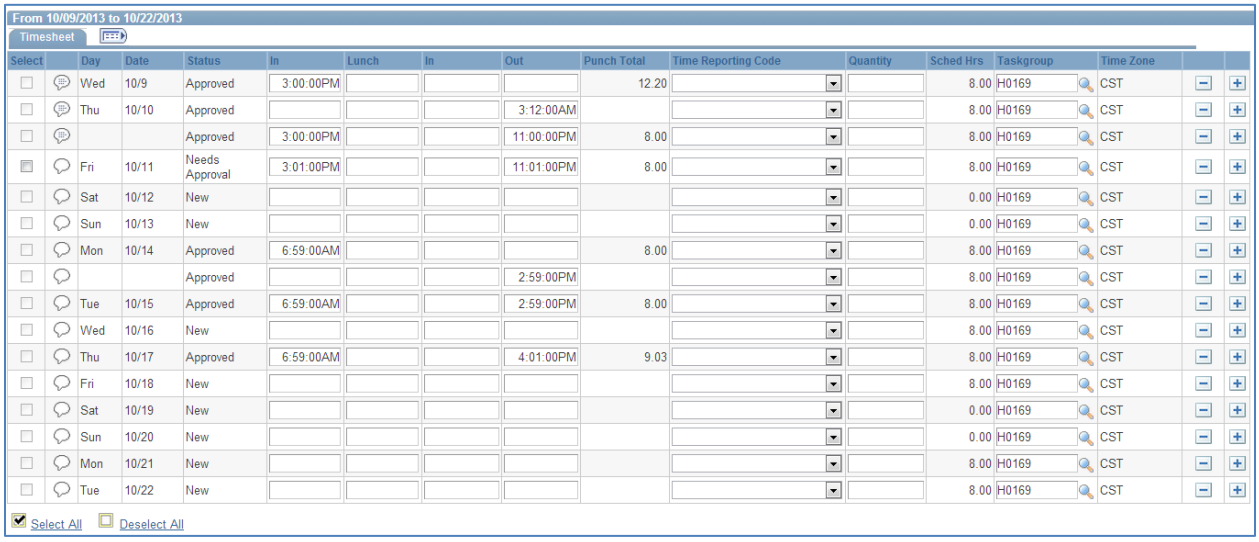


Name	Job Description	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Rcd Nbr	Department	Department Description	Taskgroup
	Advisor, Academic 2	4.00	0.00	0.00			4.00	0.00		0	H0064	Educational Psychology	PSNONCATSK
	Advisor, Academic 1	0.00	0.00	0.00			0.00	0.00		0	H0064	Educational Psychology	PSNONCATSK
	Research Assistant	0.00	0.00	0.00			0.00	0.00		0	H0059	Inst for Urban Education	PSNONCATSK

- Review the time on the Timesheet for the selected individual
- Select the time period you wish to view by selecting the date (3)



- The timesheet will appear
- Review the punches

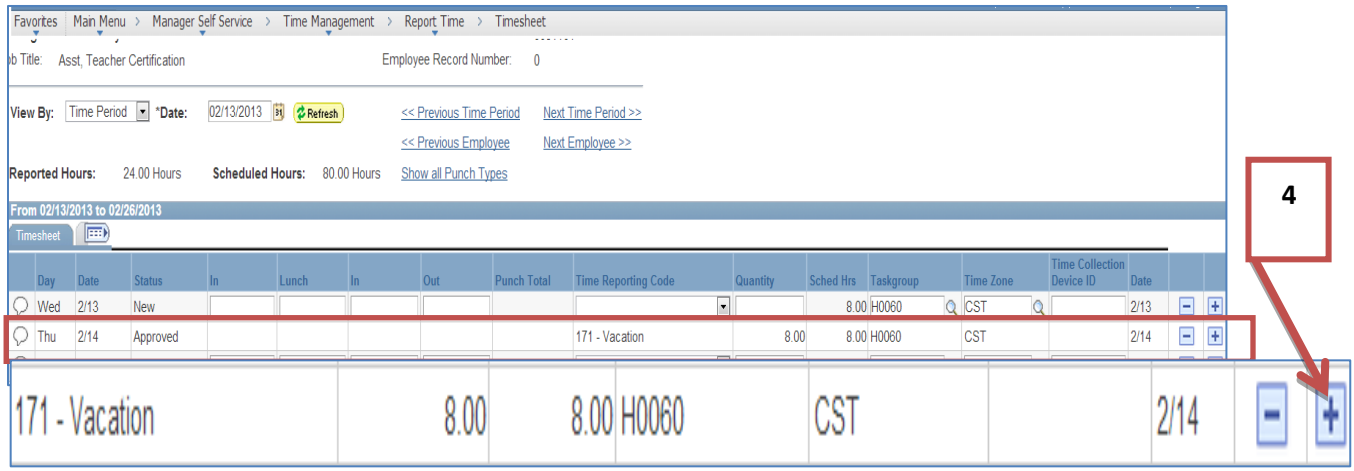


Select		Day	Date	Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity	Sched Hrs	Taskgroup	Time Zone		
		Wed	10/9	Approved	3:00:00PM				12.20			8.00	H0169	CST		
		Thu	10/10	Approved				3:12:00AM				8.00	H0169	CST		
				Approved	3:00:00PM			11:00:00PM	8.00			8.00	H0169	CST		
		Fri	10/11	Needs Approval	3:01:00PM			11:01:00PM	8.00			8.00	H0169	CST		
		Sat	10/12	New								0.00	H0169	CST		
		Sun	10/13	New								0.00	H0169	CST		
		Mon	10/14	Approved	6:59:00AM				8.00			8.00	H0169	CST		
				Approved				2:59:00PM				8.00	H0169	CST		
		Tue	10/15	Approved	6:59:00AM			2:59:00PM	8.00			8.00	H0169	CST		
		Wed	10/16	New								8.00	H0169	CST		
		Thu	10/17	Approved	6:59:00AM			4:01:00PM	9.03			8.00	H0169	CST		
		Fri	10/18	New								8.00	H0169	CST		
		Sat	10/19	New								0.00	H0169	CST		
		Sun	10/20	New								0.00	H0169	CST		
		Mon	10/21	New								8.00	H0169	CST		
		Tue	10/22	New								8.00	H0169	CST		

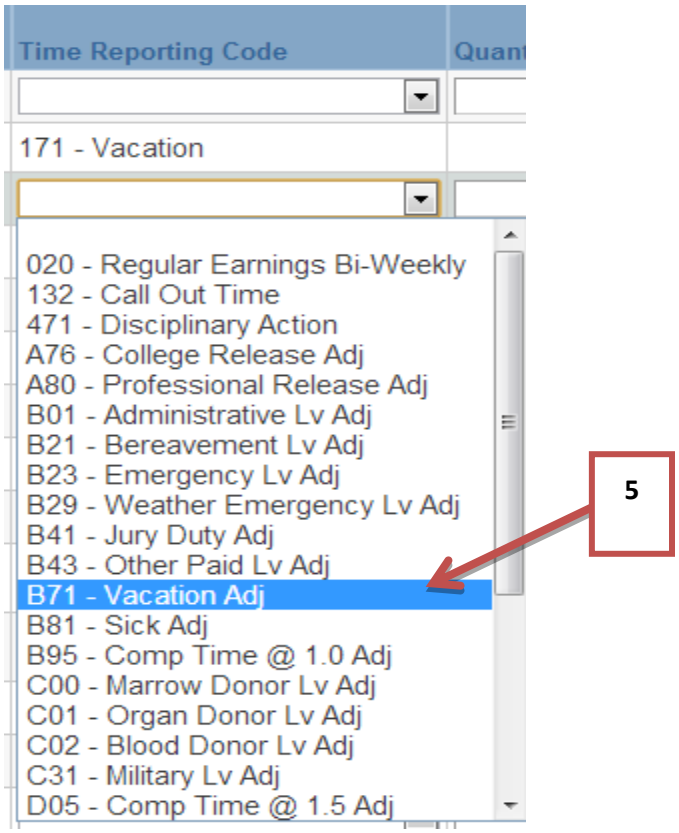
Select All Deselect All

Leave Request Adjustments

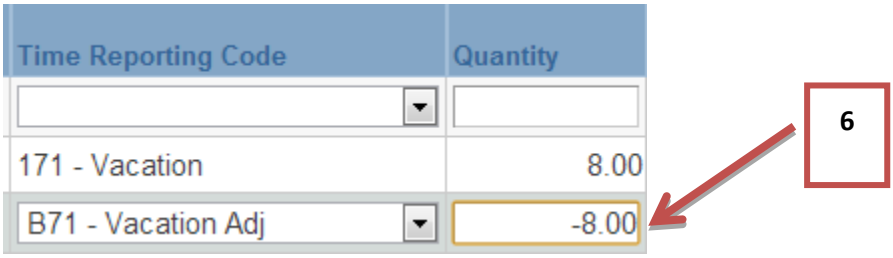
- For some corrections, such as an Absence Request, you will need to insert a row and add a TRC code
- If the absence has already been approved, the time must be corrected on the timesheet.
- Absences on the timesheets are view only, they must be adjusted by adding additional entries
- Click on the plus sign (4) on the row where you wish to adjust the time. This will add a row below the entry.



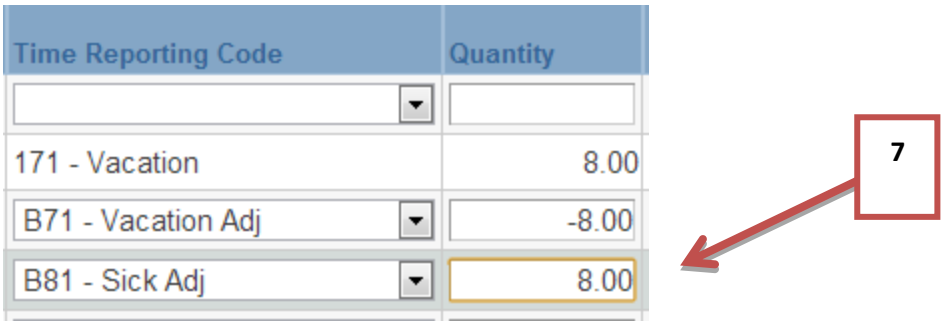
- Select the correct Time Reporting Code (TRC) from the drop down menu. (5)
  - For a vacation correction, select B71-Vacation Adj.



- In the quantity field, select the number of hours to reverse. (6)
    - This time will need to be negative since you will be taking away the hours.

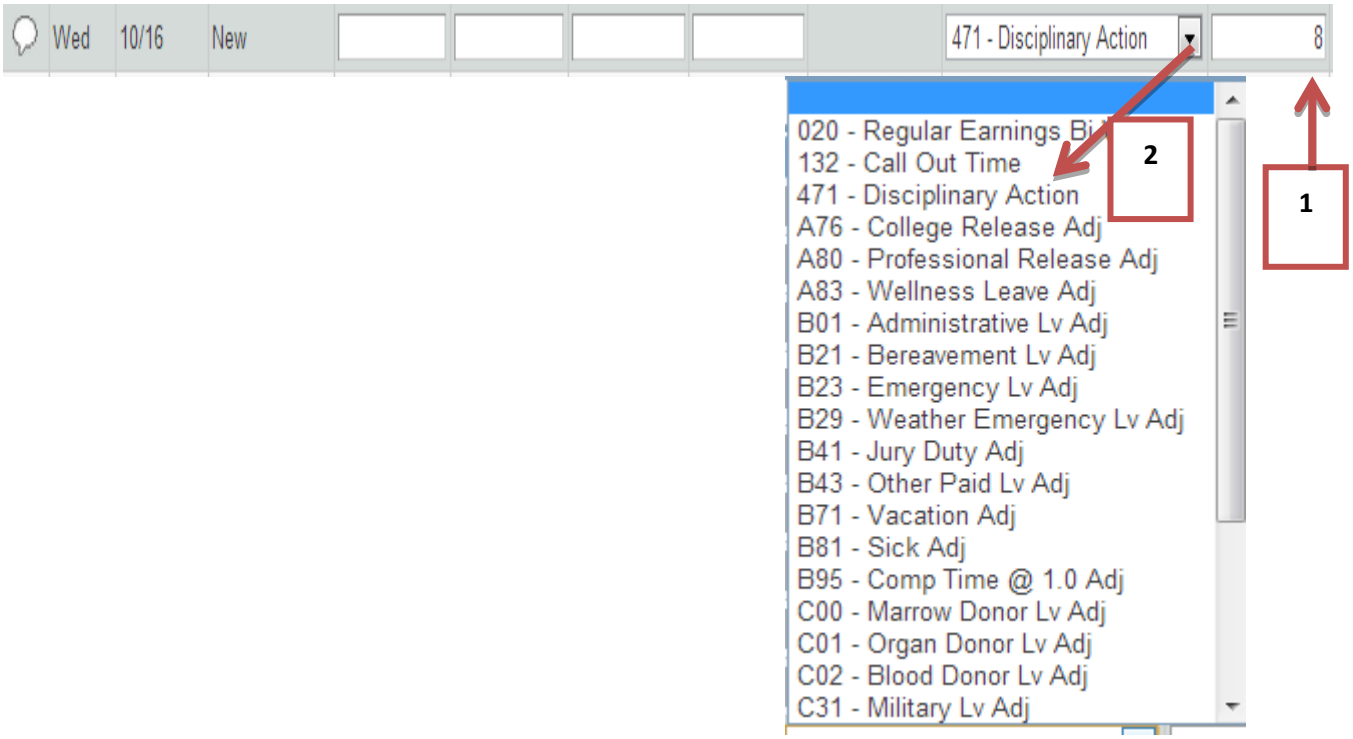


- To correct the type of leave, click the plus sign to add an additional row for a new entry.
- Add the correct TRC.
    - If it is a correction from vacation hours to sick hours, select the TRC B81-Sick Adj.
- Add the hours for the new leave; this number will be positive. (7)



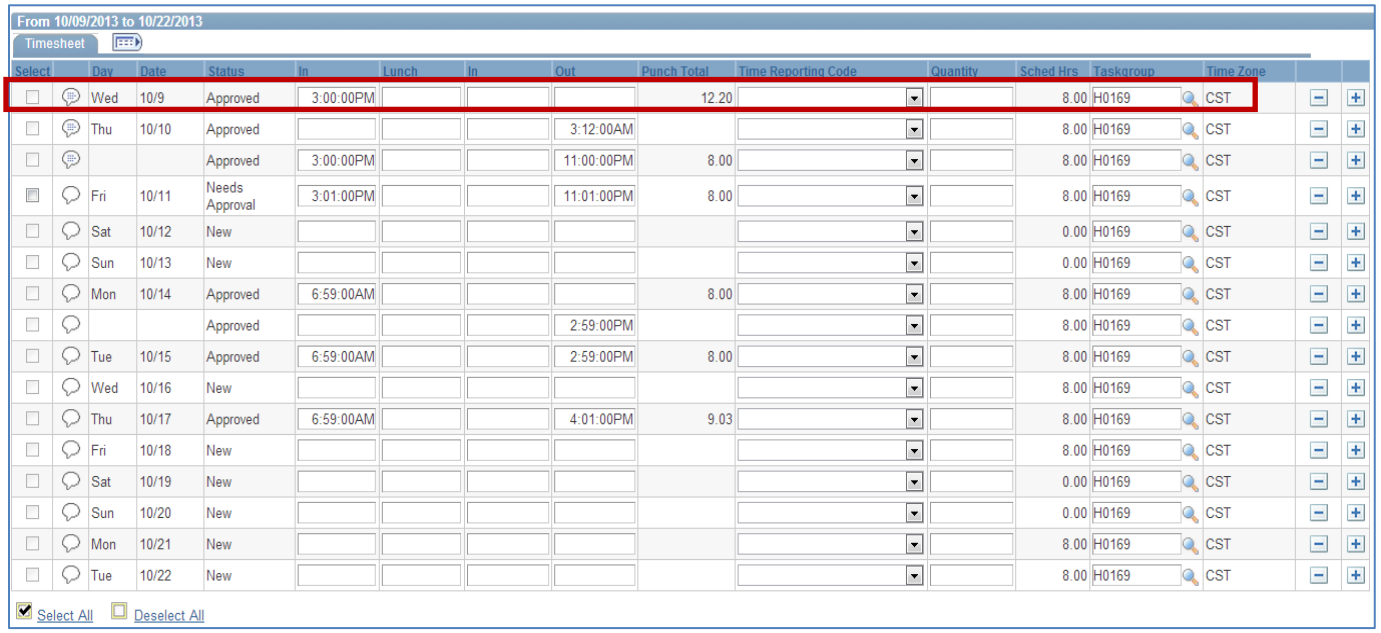
Adjustment by Quantity

- To create an correction for a Call out time, disciplinary or off campus time:
  - Enter the quantity (1)
  - Enter the TRC code (2)
  - Enter a comment (see Adding Comments)
  - Save



Missed Punch Correction

- When an employee misses a punch, it is the responsibility of the TA to enter the punch on the timesheet with a comment.
- To enter a miss punch, enter the time on the same line as the other punches for the day.
- Enter a comment (see Adding Comments)
- Save



From 10/09/2013 to 10/22/2013

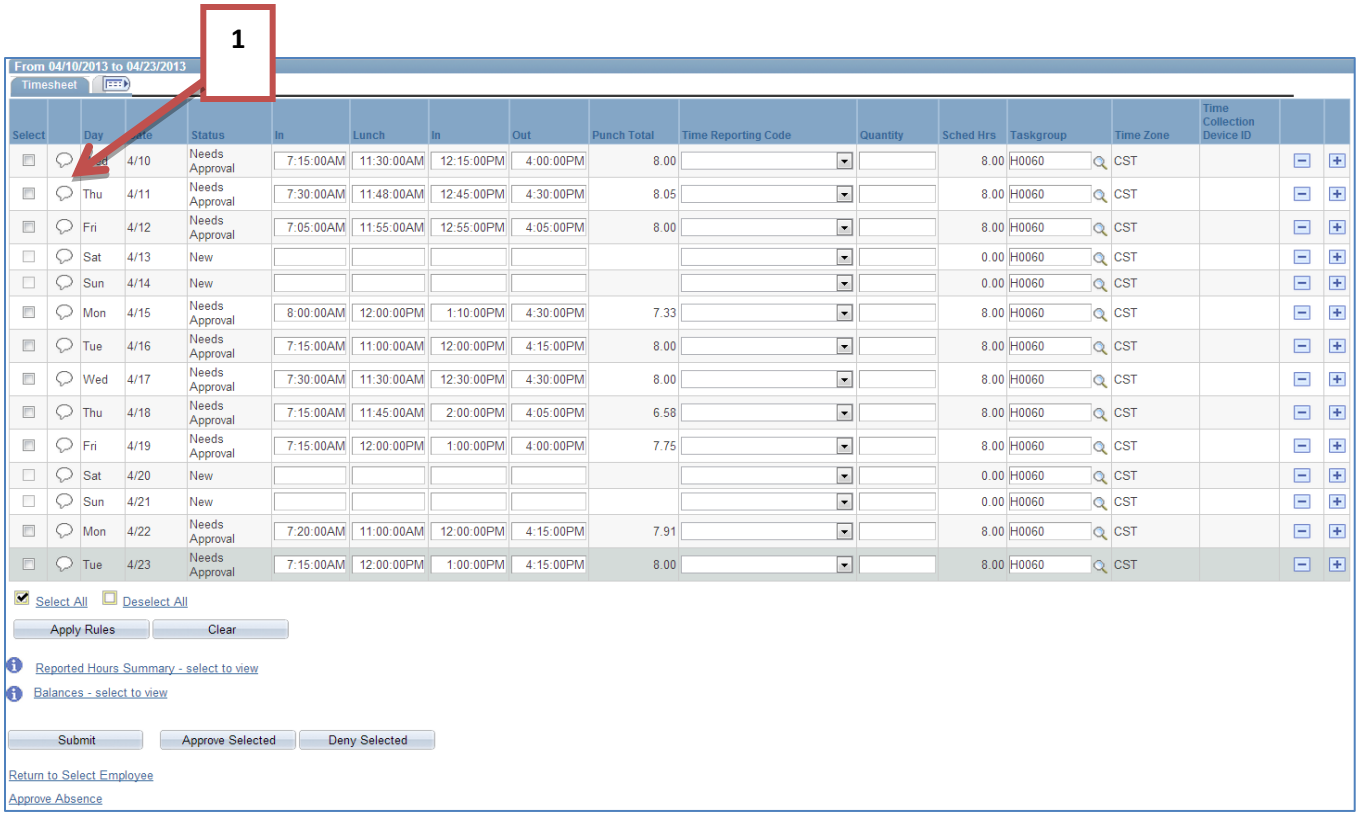
Timesheet

Select		Day	Date	Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity	Sched Hrs	Taskgroup	Time Zone		
☐		Wed	10/9	Approved	3:00:00PM				12.20			8.00	H0169	CST		
☐		Thu	10/10	Approved				3:12:00AM				8.00	H0169	CST		
☐				Approved	3:00:00PM			11:00:00PM	8.00			8.00	H0169	CST		
☐		Fri	10/11	Needs Approval	3:01:00PM			11:01:00PM	8.00			8.00	H0169	CST		
☐		Sat	10/12	New								0.00	H0169	CST		
☐		Sun	10/13	New								0.00	H0169	CST		
☐		Mon	10/14	Approved	6:59:00AM				8.00			8.00	H0169	CST		
☐				Approved				2:59:00PM				8.00	H0169	CST		
☐		Tue	10/15	Approved	6:59:00AM			2:59:00PM	8.00			8.00	H0169	CST		
☐		Wed	10/16	New								8.00	H0169	CST		
☐		Thu	10/17	Approved	6:59:00AM			4:01:00PM	9.03			8.00	H0169	CST		
☐		Fri	10/18	New								8.00	H0169	CST		
☐		Sat	10/19	New								0.00	H0169	CST		
☐		Sun	10/20	New								0.00	H0169	CST		
☐		Mon	10/21	New								8.00	H0169	CST		
☐		Tue	10/22	New								8.00	H0169	CST		

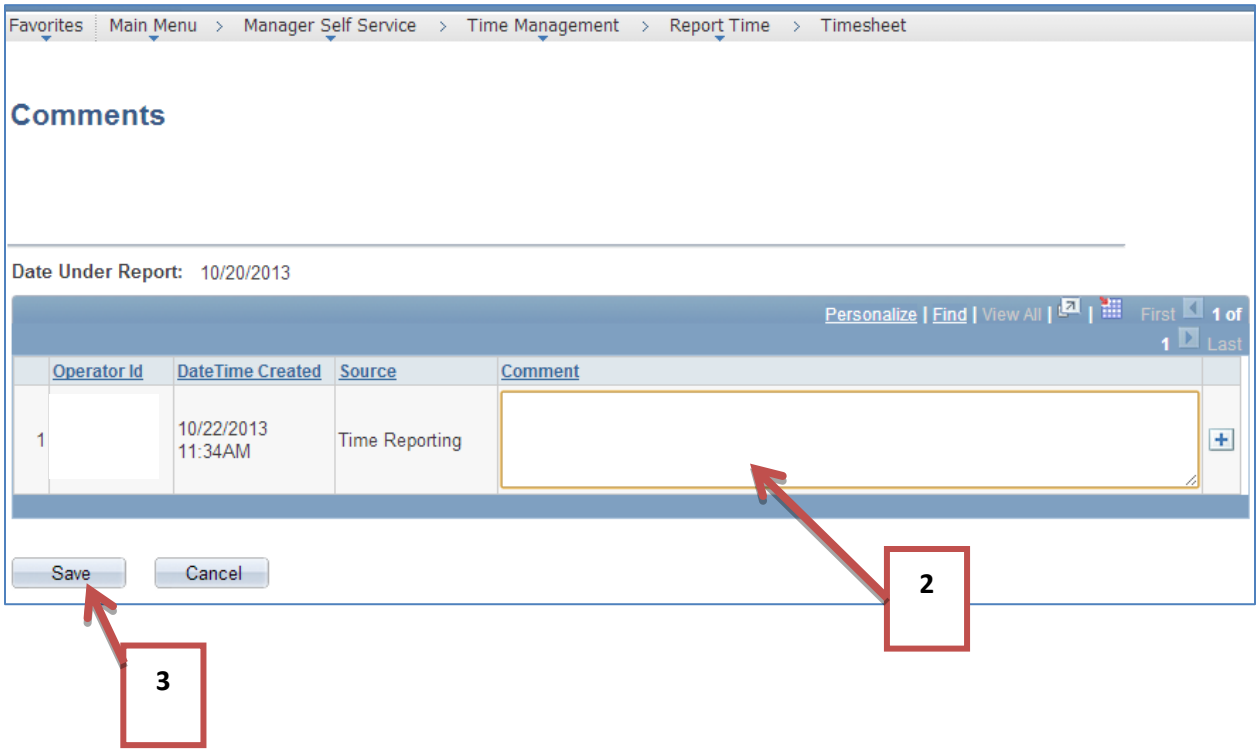
☑ Select All ☐ Deselect All

Adding Comments

- If you must enter a correction or punch, a comment will be required.
    - To add a comment, click the callout icon (1)
    - This will open a field to enter comments



- Type in your comments in the comment field (2)
- Click Save (3)



- If time is adjusted and no comment is entered, the system will not allow you to move forward. It will prompt you with the following message:

APPROVING REPORTED TIME

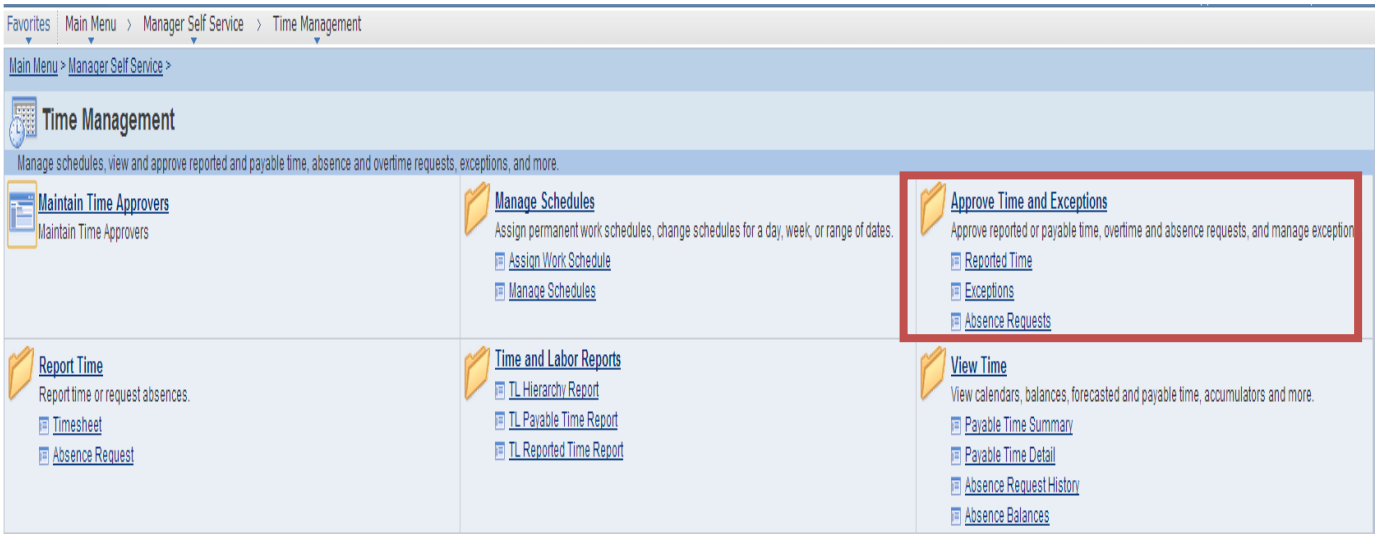
Time Approvers are responsible for approving reported time; reported time can be approved daily 24.7; however, all reported time must be approved by Wednesday at noon every week. The following is reported time that needs to be reviewed and approved

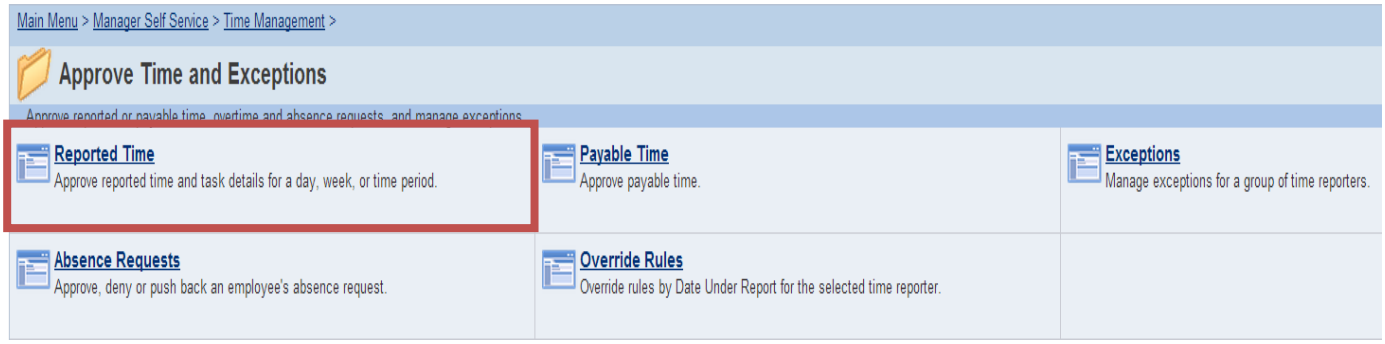
- Punches from TCDs or Web Clock
- Corrections entered by the TA

To identify employees with pending Reported Time, please use the following method:

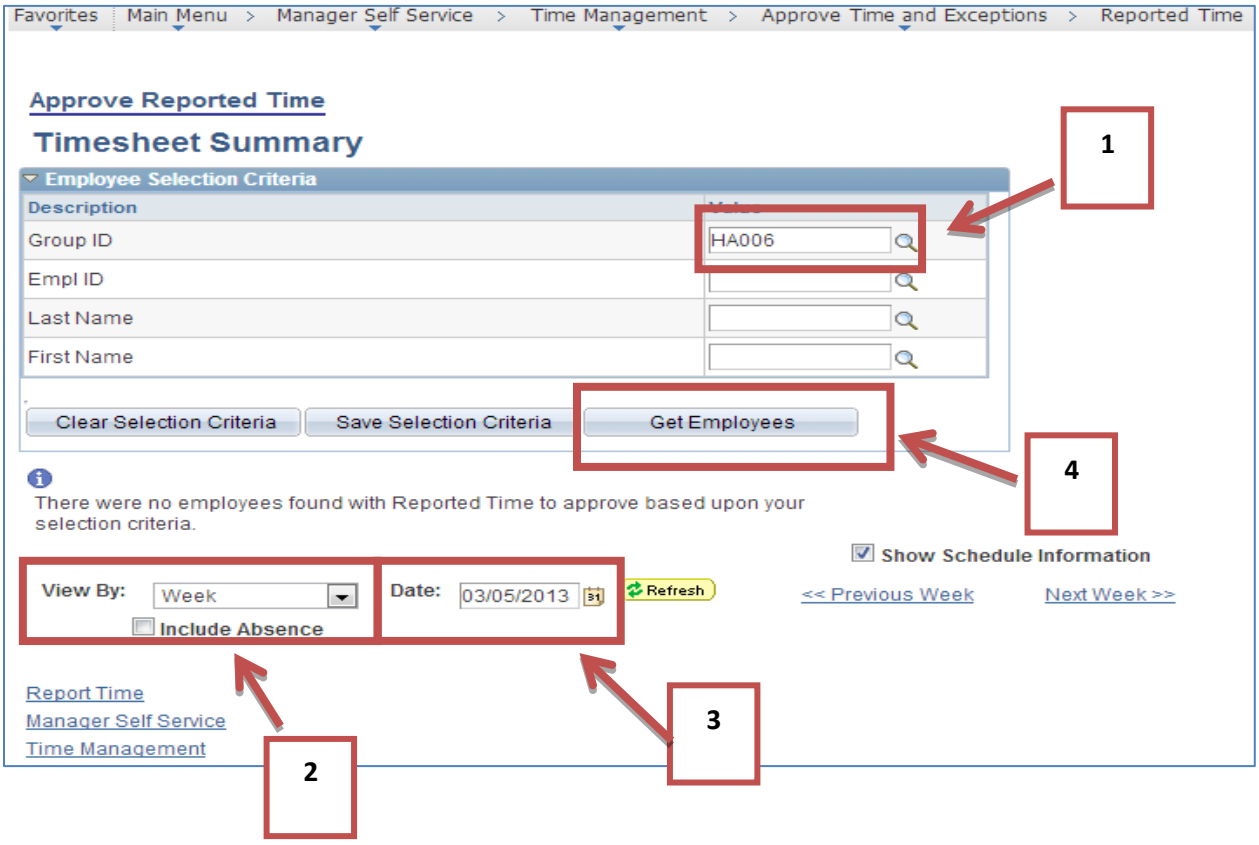
Review Reported Time to be Approved in PeopleSoft

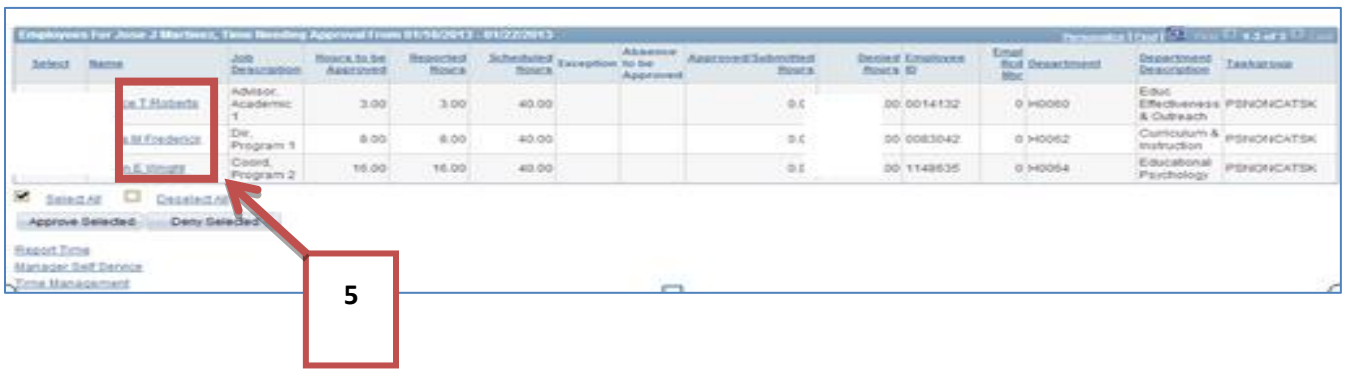
Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time





- Group ID: Enter your Group ID (1)
- View by: Select “All Time Before” (2)
- Date: Enter the date (usually the day after the pay period ends to you will see everything for the period) (3)
- Get Employees: Click “Get employees” to generate a list based on the criteria you selected. (4)
- Select Employee: Click on the name of the employee. Review the timesheet and approve. (5)

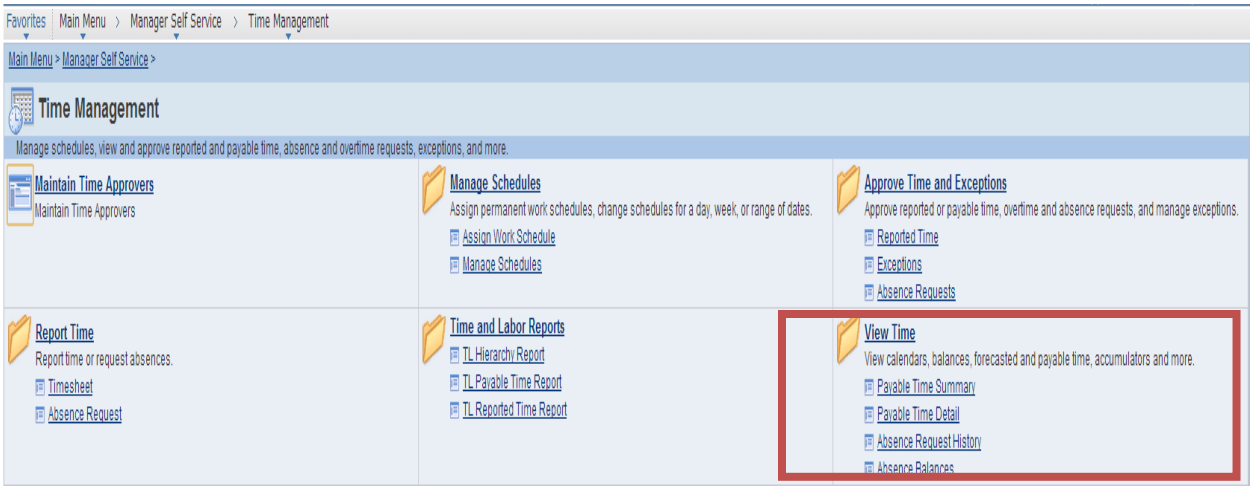


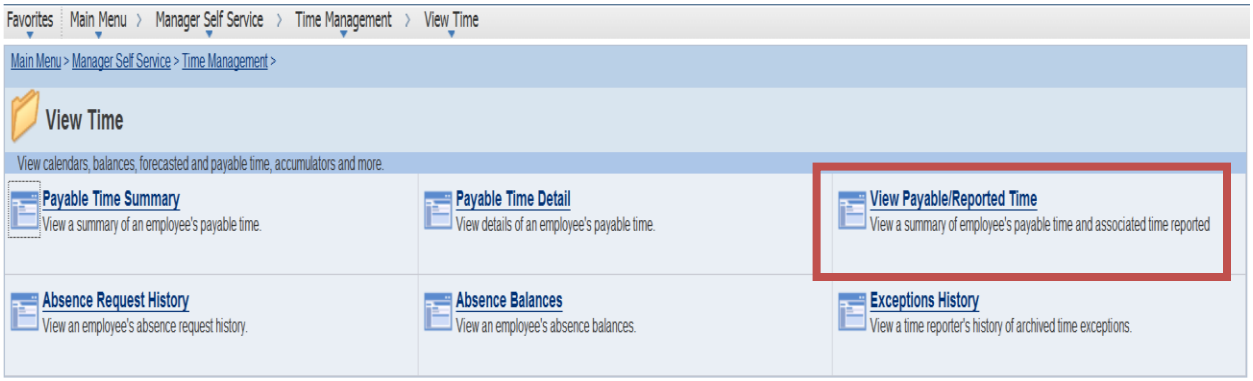


A Time Administration process is run weekly that converts Reported Time into Payable Time. After the process is run, Payable Time generated and the associated Reported Time can be viewed by employee and week.

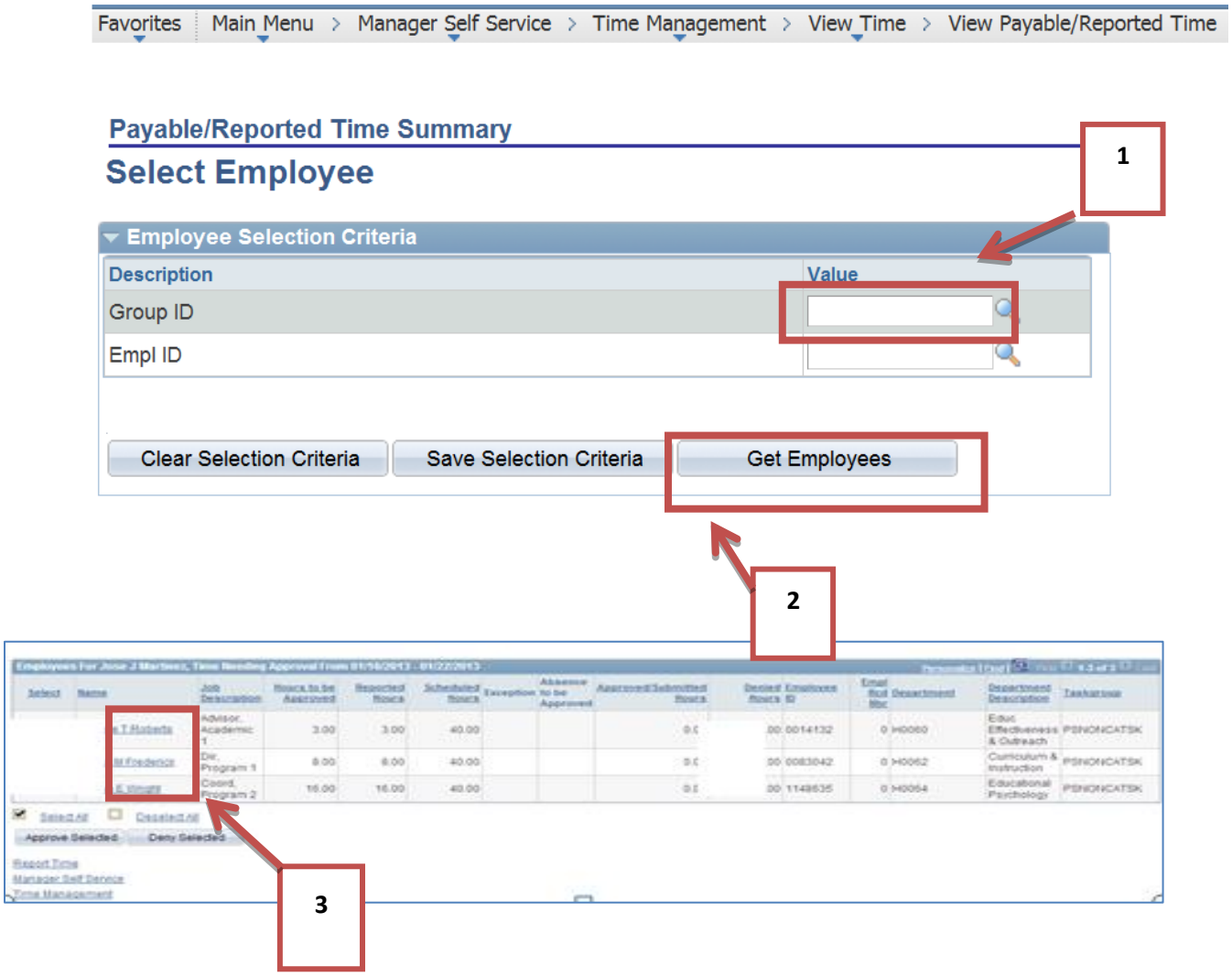
Review Payable/Reported Time by Week

Manager Self Service > Time Management > View Time > View Payable/Reported Time





- Group ID: Enter your Group ID (1)
- Get Employees: Click “Get employees” to generate a list based on the criteria you selected. (2)
- Select Employee: Click on the name of the employee. View Payable/Reported Time. (3)



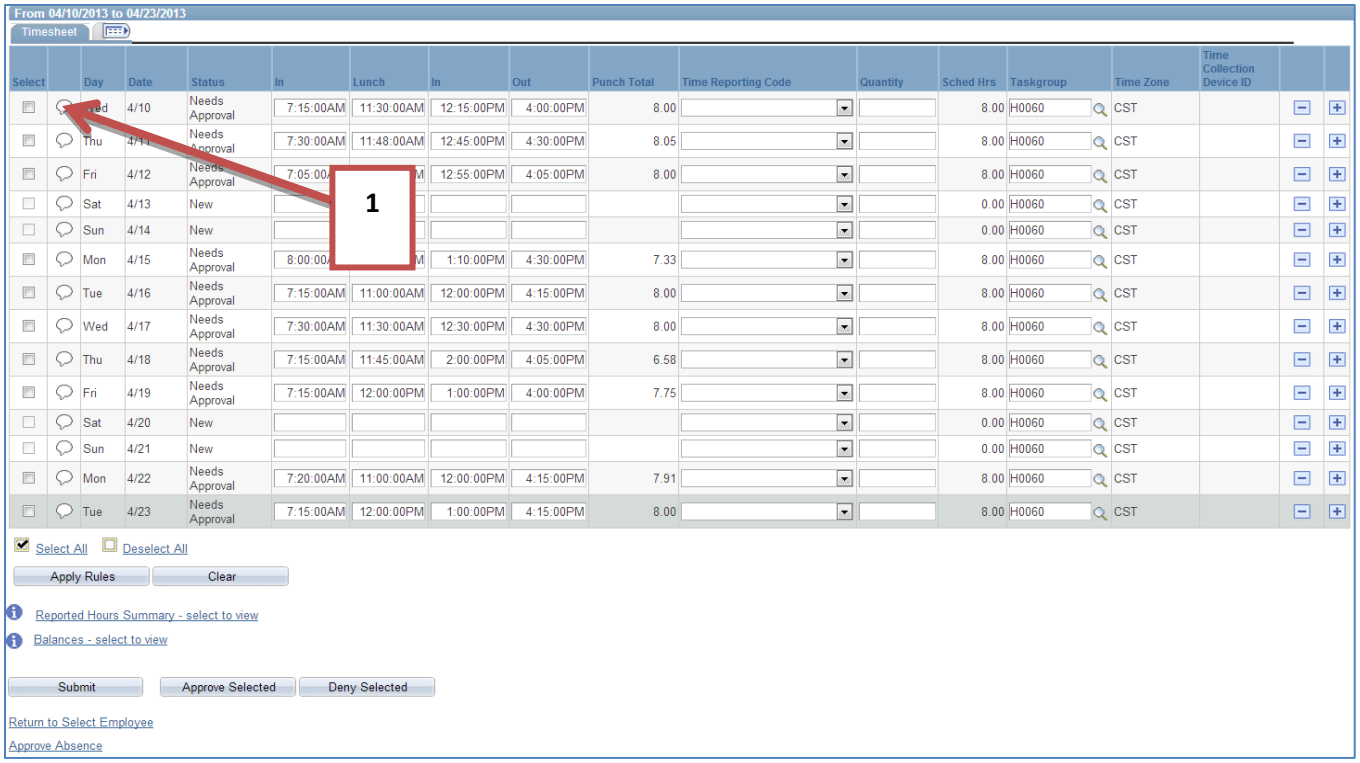
EXCEPTIONS

Clearing exceptions is the responsibility of the Department Time and Payroll Approvers and/or the HRMS/Payroll Office. There are two types of exceptions:

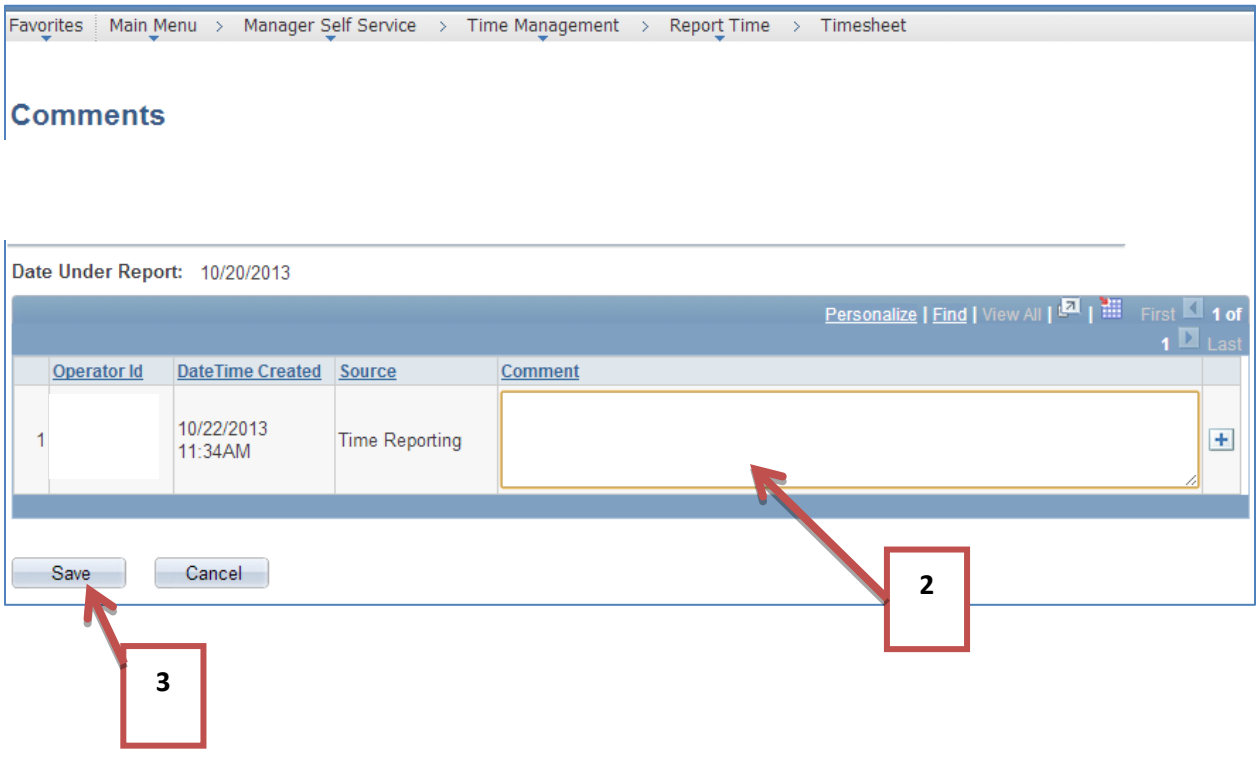
- **Low Severity**: Exception allowed; no action required.
  - Late Punch
  - Long Lunch
- **High Severity**: Must be corrected.
  - Invalid punch order: This is the exception the departments should fix. This exception is when a punch is out of order.
  - Missed punch: When the employee misses a required punch, it is the TA's responsibility to enter the correct punch
- Once a correction is made, it becomes unapproved reported time that must then go back through the approval process
- When corrections are made in the system, they must be accompanied by a comment

ADDING COMMENTS

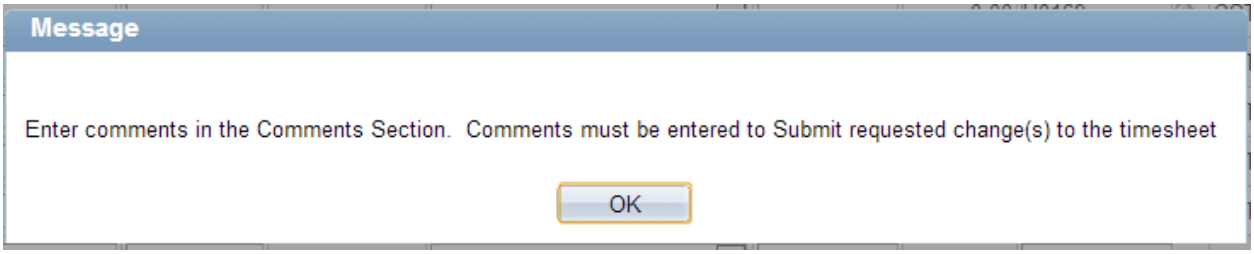
- If you must enter a punch, a comment will be required.
  - To add a comment, click the callout icon (1)
  - This will open a field to enter comments



- This will open a field to enter comments
- Type in your comments in the comment field (2)
- Click Save (3)



- If time is corrected and no comment is entered, the system will not allow you to move forward. It will prompt you with the following message:

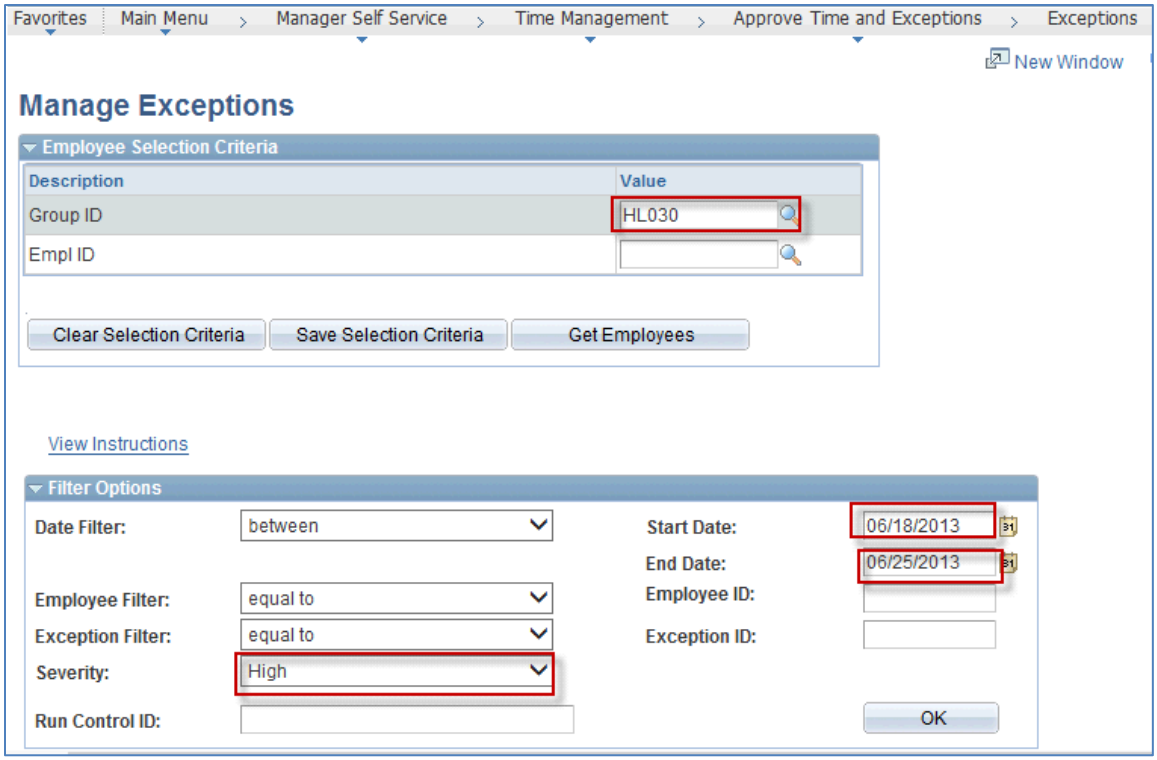


To identify employees with High Severity Exceptions, please use either of the following methods:

Options 1: Review Exceptions in PeopleSoft:

Manager Self Service > Time Management > Approve Time and Exceptions > Exceptions

- Group Id: Enter Group ID (1)
- Click on Filter Option
  - Date Filter: Select "between" (2)
  - Start Date: Enter the beginning date of the pay period. (3)
  - End Date: Enter the ending date of the pay period. (4)
  - Severity: Select "High" (5)
  - Click OK: This will provide the results based on your filter options. (6)



- Click on "Details": This will show you the detail of the exception and the employees ID.

TRAM TIME & PAYROLL APPROVER GLOSSARY:

Absence Management: is the process for managing absences. Absence Management is an Electronic Leave request form that employees use to request leave via P.A.S.S.

Cancel: is an action taken when an absence request for a time frame was denied or pushed backed to be edited or cancelled.

Deny: is a term used when a Time Approver denies an employee's absence request for leave.

Dynamic Group: of time reporters is set up for reporting or processing purposes for example, a group of employees in the same department or who have the same supervisor. The members of a dynamic group may belong to different workgroups. As an example, a dynamic group for a facilities department might include clerical staff or a painter.

Exceptions: are errors generated after Time Administration has been run and rules are applied. These exceptions occur due to missed punches, invalid punch order, late punches and long lunches. However, only high severity exceptions need to be corrected (Missed punches and Invalid punch order only).

Final Verification: is a Payroll process that runs to produce a paycheck for time submitted by time reporters.

Load to Payroll: After all absences have been finalized and all payable time has been approved, Payroll runs the Load to Payroll process which loads all time to payroll for processing.

Time that is not approved by the designated deadlines will result in a delay of payment. Late approvals will be processed on the next payroll period.

Payable Time: is the term used once the time administration process has been run against the reported time. Time administration is the process that converts approved reported time into unapproved payable time and calculates rules such as overtime and generates exceptions if errors are found.

Payroll Approver (PA): reviews, corrects and approves unapproved payable time. They are responsible for reviewing time before it is submitted to Payroll and making sure that employees are in the system under the correct Workgroups.

Payroll Approvers are responsible for ensuring all Time Approvers have reviewed and approved absence request, unapproved reported time, corrected High Severity Exceptions and corrections for all Monthly and Biweekly employees for each Pay Period by the designated deadlines.

Proxy: is an alternate. TAs and PAs have the option of setting up a proxy or alternate approver. The proxy will have the same access as the original user.

Punch: is the term used to describe the action when a time reporter enters their time via a time clock or time collection device. Punches include, punching in, meal, in and out. A typical day for a time reporter would include the following punches:

In (arrive to work) Start Meal (leave for lunch) End Meal (arrive back to work) Out (leave for the day)

Push Back: is an action that a TA or PA can perform on the absence request. When an absence request is pushed back, it is sent to the employee to edit, resubmit or cancel fi the request isn't going to be modified or taken.

Reported Time: is the time entered by time reporters and managers.

Rules: are generated by the Time Administration process that is run for each Pay Period. The process calculates all approved time and applies rules based on the approved time and workgroup the employee is assigned to. The main rules that are applied are:

- Overtime or Extra hours for hours over 40
  - If an employee is assigned to a workgroup that pays overtime and he works over 40 hours the system will apply the overtime rule that will automatically take the hours over 40 and pay as overtime.
- Comp Time 1.0 or 1.5 for hours over 40
  - If an employee is assigned to a workgroup that earns comp time and he works over 40 hours the system will apply the comp time rules that will automatically take the hours over 40 and pay as comp time earned.

Time Administration: Time Administration is the process that converts approved reported time to unapproved payable time that needs to be approved. It also applies the rules that create the exceptions. This process takes 30 minutes to 1 hour to run, so please allow this amount of time before approving any time. This process runs on a schedule that will be communicated each pay period.

Time Approver (TA): signs off on the time for an employee or group of employees. They are responsible for reviewing and cleaning up exceptions as well as enrolling employees in the system. A Time Approver reviews, corrects and approves reported time in PeopleSoft on a weekly basis.

Time Collection Device (TCD): is an electronic device used for hourly employees to punch in and out. TCDs are located in designated areas where the employee is responsible for clocking in by scanning their thumb or fingerprint to report their time worked. Data from TCDs are collected and loaded to the University's HR system for processing.

Time Reporter: (an hourly employee) enters his or her time into PeopleSoft on a daily basis via TCD or Webclock and submits Absence requests via PASS.

Time Reporting Code (TRC): is a time reporting code that corresponds to the time reported for an employee. Regular time is TRC020, overtime is TRC315, and comp time earned is TRC 190or 300. There are also time reporting codes associated with absence requests and corrections made to absence requests on the timesheet.

Time Reporting and Absence Management: The University of Houston System (UHS) is excited to introduce the new TRAM (Time Reporting and Absence Management) system. TRAM is an automated and updated application for capturing and processing time and leave that will eliminate current paper processes.

Trial Verification: is a Payroll process that calculates the time entered for employees. This generates a report (Trial) that is run by the Department Payroll Approvers (PA's) to review time and pay generated for their employees. The report is reviewed and any necessary corrections are made before Payroll is finalized.

Web Clock: is a time collection system for hourly employees and is located in P.A.S.S. Hourly employees assigned to the web clock are responsible for punching in and out via the web clock to report their time worked. Time is transmitted from the web clock punches to the University's HR system for processing.

Workgroup: is a set of time reporters who share compensation requirements such as pay frequency and work location.

Examples are: Hourly employees and Salary employees. When an employee's HR data changes for reasons such as promotions, demotions, or transfers, their characteristics for Workgroup membership may change, requiring an update in the Time and Labor Workgroup enrollment. When employees are terminated, their Workgroup enrollment in Time and Labor must be inactivated.

TRAM Reports

Navigation:
Manager Self Service > Time Management > TRAM Reports

1. **TRAM Absence Report**
   Review Absence Requests
   Purpose
   - Displays Absence Requests, including hours, and status of request by Employee and Empl Rcd #
   - Displays Total Hours Approved, Submitted, Pushed Back by Employee, Empl Rcd #, and Absence Type; and by Report by Absence Type and Status
   - Provides Absence Request history for Employee, including whether Employee or Manager submitted request, Date request Submitted and Date request Approved
   - Provides Absence Requests for a pay period by Employee, Empl Rcd #
   - Identifies Absence Requests Needing Approval

   Run Parameters
   - By Business Unit (Campus), Division, College, Department, Group ID, Empl ID
   - By Hourly Time Reporters, Salary (Monthly) Time Reporters, or all Time Reporters
   - By From Date and Thru Date (Report includes Absence Requests with a Begin Date in the time period requested)

   Process Name: UPAY204

2. **TRAM Available Leave Report**
   Review Leave Balances
   Purpose
   - Displays Projected Leave Balances by Employee; Projected Leave Balances include hours pending in Payroll, Time Reporting, and Absence Management
   - Displays Maximum Vacation Accrual Hours at end of Fiscal Year to monitor employees at risk of losing vacation
   - Identifies Employees with Negative Leave Balances

   Run Parameters
   - By Business Unit (Campus), Division, College, Department, Group ID, Empl ID
   - By Hourly Time Reporters, Salary (Monthly) Time Reporters, or all Time Reporters
   - By All Leave Types, Sick Leave Only, Vacation Leave Only, Sick & Vacation Leave Only, or Comp Time Only
   - Options:
     - Only Display Employees with Projected Negative Leave Balances (Check to identify employees with negative leave balances)

   Process Name: UPAY207

3. **TRAM Absence Audit Report**
   Review Absence Request Transactions
   Purpose
   - Displays Absence Requests, including hours, by Employee and detailed Workflow Transaction History
   - Provides Absence Request Workflow Transaction History for a pay period by Employee, Empl Rcd #
   - Provides Absence Request Workflow Transaction History to research approvals and discrepancies

Run Parameters

- By Business Unit (Campus), Division, College, Department, Group ID, Empl ID
- By Hourly Time Reporters, Salary (Monthly) Time Reporters, or all Time Reporters
- By From Date and Thru Date (Report includes Absence Requests with a Begin Date in the time period requested)

Process Name: UPAY208

4. **TRAM Time Report**

Evaluate Reported Time to Payable Time

Purpose

- Displays Payable Time and associated Reported Time by Employee, Empl ID, and Date; totals Payable Time Hours by Employee, Emp Rcd #, and Time Reporting Code (TRC)
- Displays Total Payable Time Hours Approved, Needs Approval, and Taken by Payroll and Rejected by Payroll once hours have been loaded into Payroll
- Allows Time Approvers and Payroll Approvers to compare Reported Time to Payable Time generated
- Identifies Payable Time to be approved and Payable Time Rejected by Payroll

Run Parameters

- By Business Unit (Campus), Division, College, Department, Group ID, Empl ID
- By Hourly Time Reporters, Salary (Monthly) Time Reporters, or all Time Reporters
- By From Date and Thru Date (Enter Pay Period Begin and End Dates to review by Pay Period)

Process Name: UPAY205

5. **TRAM Time Audit Report**

Review Time Approver Corrections

Purpose

- Displays Reported Time Added, Deleted, and/or Changed and Comments entered by Time Approver or Payable Approver by Employee, Empl ID, and Date
- Displays Number of Days Corrected by Employee and Empl ID
- Identifies Corrections entered by Time Approvers and Payable Approvers for review for Comments and appropriate justification

Run Parameters

- By Business Unit (Campus), Division, College, Department, Group ID, Empl ID
- By Hourly Time Reporters, Salary (Monthly) Time Reporters, or all Time Reporters
- By From Date and Thru Date (Enter Pay Period Begin and End Dates to review by Pay Period)

Process Name: UPAY206

6. **TRAM Hierarchy Report**

Review Time Reporter assignment to TAs and PAs

Purpose

- Displays Time Reporters assigned to Time Approvers, and Time Approvers assigned to Payroll Approvers
- Displays Time Approver Alternates (Proxy) and Payroll Approver Alternates (Proxy)
- Displays Time Approver and Payroll Approver Group IDs
- Identifies unassigned Time Reporters and unassigned Time Approvers

Run Parameters

- By Business Unit (Campus), Division, College, Department
- By Hourly Time Reporters, Salary (Monthly) Time Reporters, or all Time Reporters

- By “As of Date” (Enter Current Date unless report is to review historical data)
- Options:
    - Display Time Reporters (Uncheck to display only Time Approvers and Payroll Approvers)
    - Display Time Reporters with No Approver (Uncheck to remove unassigned Time Reporters from report)

Process Name: UPAY160

Helpful Queries

HRMS_AM_LV_RQS_PND_APR_DEPT

Absence Requests Pending Approval by Division, College, or Department ID
Prompts:
Leave Begin Date
Leave End Date
Div/Coll/Dept #
(Leave Begin/End Dates are based upon Absence Request Begin Dates)

HRMS_TR_BW_RT_NA_BY_DEPT

Bi-Weekly Reported Time Pending Approval by Division, College, or Department ID
Prompts:
TR Report Date >=
TR Report Date <=
Div/Coll/Dept #
(Enter Pay Period Begin and End Dates for TR Report Dates)

HRMS_TR_MO_RT_NA_BY_DEPT

Monthly Reported Time Pending Approval by Division, College, or Department ID
Prompts:
TR Report Date >=
TR Report Date <=
Div/Coll/Dept #
(Enter Pay Period Begin and End Dates for TR Report Dates)

HRMS_TR_BW_PT_NA_BY_DEPT

Bi-Weekly Payable Time Pending Approval by Division, College, or Department ID
Prompts:
TR Report Date >=
TR Report Date <=
Div/Coll/Dept #
(Enter Pay Period Begin and End Dates for TR Report Dates)

HRMS_TR_MO_PT_NA_BY_DEPT

Monthly Payable Time Pending Approval by Division, College, or Department ID
Prompts:
TR Report Date >=
TR Report Date <=
Div/Coll/Dept #
(Enter Pay Period Begin and End Dates for TR Report Dates)