Accessing the Manager Self Service Module in PeopleSoft for Approvers

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Manager Self Service Overview

As an MCG manager, you will automatically be provided with a Novell user id and password (this may also be referred to as your MCGNET ID and password). This Novell login and password will also be used for you to log in to the PeopleSoft web application to create and approve personnel data on line. PeopleSoft is a standard web-based application and if you regularly use the internet and other web-based applications, the navigation should seem familiar to you.

These instructions cover the PeopleSoft Manager-Service Application. As the originator and approver, you will be able to view, create and approve personnel transactions.

Special Note: The majority of changes will need an approver, except for the Status Changes – Retire Employee and Terminate Employee.

The ePAR module includes your Job and Personal Information pages. By accessing these pages in the application, you will be able to review and update an employee’s job status within the organization, manager employee promotions, review an employee’s personal information, and request, review and approve salary changes for an individual or group of employees where a budget has not been allocated.
QuickStart Instructions
(for the experienced internet user who needs basic navigation instructions only)

To access PeopleSoft, go to the MCG homepage at www.mcg.edu and click on the MyMCG link at the top of the page and then click on the SoftServ link icon located in the MyApps section.

Once you are at this login screen, you may want to consider saving this as a favorite so that you can simply click on the link each time you want to access Manager Self Service.

At the PeopleSoft login screen, enter your Novell user id and password. Click the “Sign In” radio button and this will bring you to the main PeopleSoft Menu. On the left side of the screen, you will see a blue box with Menu as the heading. Click on “Manager Self Service”. The yellow arrow indicates that there are options within that link. Click on the yellow arrow to display all options available to you.

Two options will be available to you:
Job and Personal Information
Manager Home (will take you to the Job and Personal Information link)

Click on Job and Personal Information and a listing of options will display. Options are:

1. Status Changes
2. Promotions
3. Employee Personal Information
4. Salary Changes

1) The first option is Status Changes. This option provides you the option to review and update an employee’s job status within the organization. This page includes links to Retire Employee and Terminate Employee.

*Only those with access as the Originator and Originator / Approver will have access to Status Changes.
** Status changes do not require approval.

Click on Retire Employee
Enter the date the retirement will take place and click Go.
The Retirement Date is the first day the employee is no longer employed at MCG.
Select an employee’s name to initiate a retirement or click the chart icon to find an indirect report.
Indicate the reason for retirement, then click submit.
A screen will appear with your changes.
* If the employee you selected to retire, is not eligible for retirement an e-mail will be sent to you indicating that the transaction was denied.

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home. Click on Job and Personal Information Home.

The second item under Status Changes is Terminate Employee. Click on Terminate Employee.

Enter the date the termination will take place and click Go.
The Termination Date is the first day the employee is no longer employed at the company.
Select an employee’s name to initiate a termination or click the chart icon to find an indirect report.
On the following screen select the Reason for Termination from the drop down box.
Click submit, and then OK to view your changes.
This transaction goes directly to the personnel administrator for processing

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home. Click on Job and Personal Information Home.

2) The second option under Job and Personal Information Home is Promotions. This option provides you with the ability to manage employee promotions. The Promotions transactions does require approval.
Three options appear under Promotions:
*Promote Employee - originator
Approve Promotion - approver
View Promotion Status – originator and approver
* As the approver you will not have access to Promote Employee

Click on Approve Promotion.  
As the approver (the originator of this transaction will not have access to this option), you can view the list that contains promotion requests requiring your approval. Click on an employee to view details and to process the approval. You can add your comments to the transaction. You can approve, deny, or reroute the transaction. If you approve, type in the next approver’s ID (MMOUSE for Mickey Mouse), and their Role Name (title). Click Submit then OK to view your request.

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home. Click on Job and Personal Information Home.

The third item listed under Promotions is View Promotion Status.  
Click on View Promotion Status. Both the approver and the manager originating the promotion transaction can view the list that contains promotion requests. Click on an employee to view details. The promotion status details will display the status of the promotion and which administrator is in the process of approving, denying, or rerouting the transaction.

You can select to return to Manager Home or Job and Personal Information Home. Click on Job and Personal Information Home.

3) The third option under Job and Personal Information Home is Employee Personal Information.  
Managers will be able to review an employee’s personal information such as name, address and other relevant data. Click on Employee Personal Information.

As a manager you have the option to select an employee that you supervise and display her/his information by clicking on the employee name. To find a specific employee click on search for an employee in your organization. To drill down into the direct reports of one of your employees click the org chart icon.

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home.

4) The fourth option under the Job and Personal Information Home is Salary Changes. This option will allow you to request, review and approve salary changes for an individual or group of employees where a budget has not been allocated.

Three items appear under Salary Changes:
*Request Salary Change- originator
Approve Salary Change -approver
View Salary Change Status- originator / approver
* As the approver you will not have access to Request Salary Change

Click on Approve Salary Change.  
This option will be available to all approvers. The hyperlinks below indicate groups of employees which require your participation in an approval process. Click on a hyperlink to see details about what needs to be approved for each employee contained in the group

As the approver (the originator of this transaction will not have access to this option), you can view the list that contains salary requests or changes requiring your approval. Click on the salary change to view details and to process the approval. You can add your comments to the transaction. You can approve, deny, or reroute the transaction. Type in the next approver’s ID (MMOUSE for Mickey Mouse), and their Role Name (title). Click Save then OK.
You can select to return to Return to Approval / Status List, Manager Home or Job and Personal Information Home.

Click on View Salary Change Status

Both the approver and the manager originating the salary change transaction can view the list that contains promotion requests. Click on the salary change hyperlink to view details. The salary change details will display the status of the salary request and which administrator is in the process of approving, denying, or rerouting the transaction.

You can select to return to Manager Home or Job and Personal Information Home.

Detailed Instructions
(for the experienced and less experienced internet user who is more comfortable using detailed instructions.)
To access PeopleSoft, go to your Internet Browser and type in the following link:

Once you are at this login screen, you may want to consider saving this as a favorite so that you can simply click on the link each time you want to access Manager Self Service.

At the PeopleSoft login screen, enter your Novell user id and password.

Click the “Sign In” radio button and this will bring you to the Manager Self Service page shown below:

Click on Manager Self Service.

On the left side of the screen, you will see a blue box with Menu as the heading. Click on “Manager Self Service”. The yellow arrow indicates that there are options within that link. Click on the yellow arrow to display all options available to you.
Click on Job and Personal Information Home link (the Manager Home will take you to the Job and Personal Information link).

The screen below will appear.

Options are:

- Status Changes
- Promotions
- Employee Personal Information
- Salary Changes

The first option is Status Changes. This option provides you the option to review and update an employee’s job status within the organization. This page includes links to Retire Employee and Terminate Employee.
*Only those with access as the Originator and Originator / Approver will have access to Status Changes.
** Status changes do not require approval.

Click on **Retire Employee**. A screen will appear with your direct reports. Fictitious names have been created for this training manual.

Enter the date the retirement will take place and click Go. The Retirement Date is the first day the employee is no longer employed at MCG.

Select an employee's name to initiate a retirement or click the chart icon to find an indirect report.

Indicate the reason for retirement, then click submit and OK. A screen will appear with your changes.
* If the employee you selected to retire, is not eligible for retirement an e-mail will be sent to you indicating that the transaction was denied.

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home.

Click on Job and Personal Information Home.

The second item under Status Changes is Terminate Employee.

Click on Terminate Employee.
Enter the date the termination will take place and click Go. The Termination Date is the first day the employee is no longer employed at the company. Select an employee's name to initiate a termination or click the chart icon to find an indirect report. Select the Reason for Termination from the drop down box.

Click submit, and then OK to view your changes.
This transaction goes directly to the personnel administrator. For processing you can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home. Click on Job and Personal Information Home.

The second option under Job and Personal Information Home is Promotions. This option provides you with the ability to manage employee promotions. The Promotions transactions does require approval.

Three options appear under Promotions:
* Promote Employee - originator
Approve Promotion - approver
View Promotion Status – originator and approver
* As the approver you will not have access to Promote Employee
Click on **Approve Promotion**.

**Approve Promotion**

Select a Transaction

The list below contains promotion requests requiring your approval. Click on an employee to view details and process the approval.

<table>
<thead>
<tr>
<th>Name</th>
<th>Promotion Date</th>
<th>Effective Sequence</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Newman</td>
<td>04/24/2006</td>
<td>1</td>
<td>In Approval Process</td>
</tr>
<tr>
<td>Ta Shama Stevenson</td>
<td>04/21/2006</td>
<td>1</td>
<td>In Approval Process</td>
</tr>
</tbody>
</table>

**Go To:**
- Manager Home
- Job and Personal Information Home

As the approver (the originator of this transaction will not have access to this option), you can view the list that contains promotion requests requiring your approval. Click on an employee to view details and to process the approval.
You can add your comments to the transaction. You can approve, deny, or reroute the transaction. If you approve, type in the next approver’s ID (MMOUSE for Mickey Mouse), and their Role Name (title). Click Submit then OK to view your request.

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home.
Click on Job and Personal Information Home.

The third item listed under Promotions is View Promotion Status.

Click on View Promotion Status. Both the approver and the manager originating the promotion transaction can view the list that contains promotion requests. Click on an employee to view details.
The promotion status details will display the status of the promotion and which administrator is in the process of approving, denying, or rerouting the transaction.

If any of the information is incorrect or you have accidentally routed your transaction to the wrong place, contact HR Processing immediately at 721-0961.

You can select to return to Manager Home or Job and Personal Information Home. Click on Job and Personal Information Home.

The third option under Job and Personal Information Home is Employee Personal Information. Managers will be able to review an employee’s personal information such as name, address and other relevant data. Click on Employee Personal Information.
As a manager you have the option to select an employee that you supervise and display her/his information by clicking on the employee name. To find a specific employee click on search for an employee in your organization. To drill down into the direct reports of one of your employees click the org chart icon.

You can select to return to Return to Select Employee, Manager Home or Job and Personal Information Home.

Click on Job and Personal Information Home.

The fourth option under the Job and Personal Information Home is Salary Changes. This option will allow you to request, review and approve salary changes for an individual or group of employees where a budget has not been allocated.

Three items appear under Salary Changes:

*Request Salary Change- originator
Approve Salary Change -approver
View Salary Change Status- originator / approver
* As the approver you will not have access to Request Salary Change
Click on Approve Salary Change.

This option will be available to all approvers. The hyperlinks indicate groups of employees which require your participation in an approval process. Click on a hyperlink to see details about what needs to be approved for each employee contained in the group.

As the approver you can Approve, Deny or Reroute the request. At the bottom of the same screen, you can indicate who will receive the request next.
When complete click save, and then OK. You will be the details of the salary change.

At the bottom of the screen you will see a list of the personnel administrators. You will have the option to Return to the Approval / Status List, Manager Home or Job and Personal Information Home.
Click on **View Salary Changes**. You will be able to view all the status of all the salary changes and requests.