

Accessing the Manager Self Service Module in PeopleSoft for Originators

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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

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

Status Changes
Promotions
Employee Personal Information
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.

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**.

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 items appear under Promotions:

Promote Employee- Originator

*Approve Promotion - Approver

View Promotion Status- Originator and Approver

*As the originator you will not have access to Promote Employee

Click on **Promote Employee**.

Promotions are for one pay grade to a higher pay grade within your department.

Enter the date the promotion will take place and click Go. Select an employee to initiate a promotion by clicking on the employee name, clicking on Search for Employee, or clicking on the chart icon to find an indirect report.

On the next screen you can view the promotion details. Indicate the reason for the promotion from the drop down box. Under "New Info" type the new position title (click on the search button to the right of the box to view a list of positions). Select the position for your department. Under the comment section, write your comments on why this individual should be promoted.

If you are routing this transaction to be approved, click on Approve. Type in the *approver's ID (MMOUSE for Mickey Mouse), and their Role Name (title). Click Submit then OK to view your request.

* If you are unsure who your approver is, contact your immediate supervisor or the HR Processing Manager at 721-0961.

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

Click on **Request Salary Changes**. Begin your Salary Change Request by entering the date on which the salary change will take effect and clicking Go. Then, select one or more employees for whom you will be requesting a change and click Continue. Enter the desired salary change information and click Calculate New Total for each person. You can change the percent, amount or new amount. You can type your comments in the comment box. If you routing this transaction to be approved, click on Approve. Type in your ID (MMOUSE for Mickey Mouse), and your 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 next 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**.

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**.

Click on **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

Approve Salary Change

View Salary Change Status

*As the originator you will not have access to Approve Salary Change

Click on **Request Salary Change**.

Begin your Salary Change Request by entering the date on which the salary change will take effect and clicking Go. Then, select one or more employees for whom you will be requesting a change and click Continue.

The employees you selected are displayed on the screen.

Enter the desired salary change information and click Calculate New Total for each person. You can change the percent, amount or new amount. You can type your comments in the comment box. If you routing this transaction to be approved, click on Approve. Type in their ID (MMOUSE for Mickey Mouse), and your Role Name (title). Click Submit once all salary changes have been made 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**.

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.

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**.

Detailed Instructions

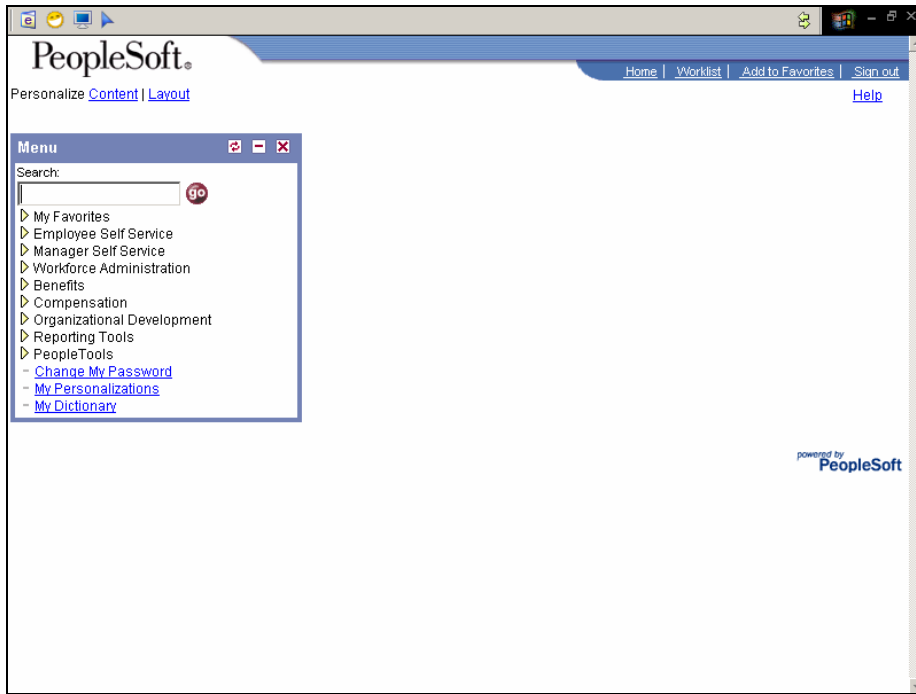
(for the experienced and less experienced internet user who is more comfortable using detailed instructions.)

To access PeopleSoft, go to your Internet Browser and type in the following link:

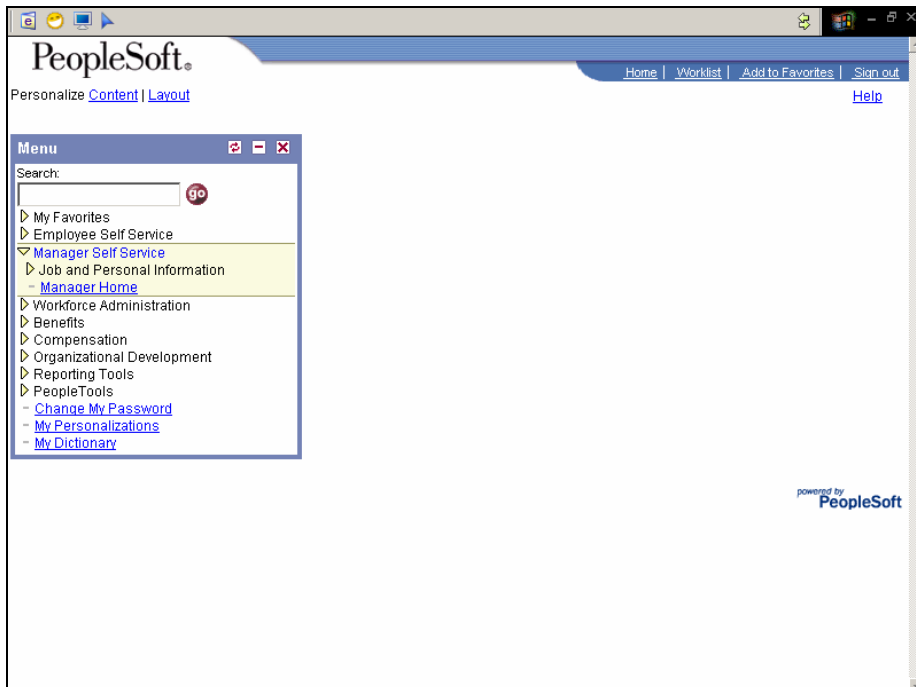
Once you are at this login screen, you may want to consider saving this as a favorite so that you can simply click on the link each time you want to access Manager Self Service.

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

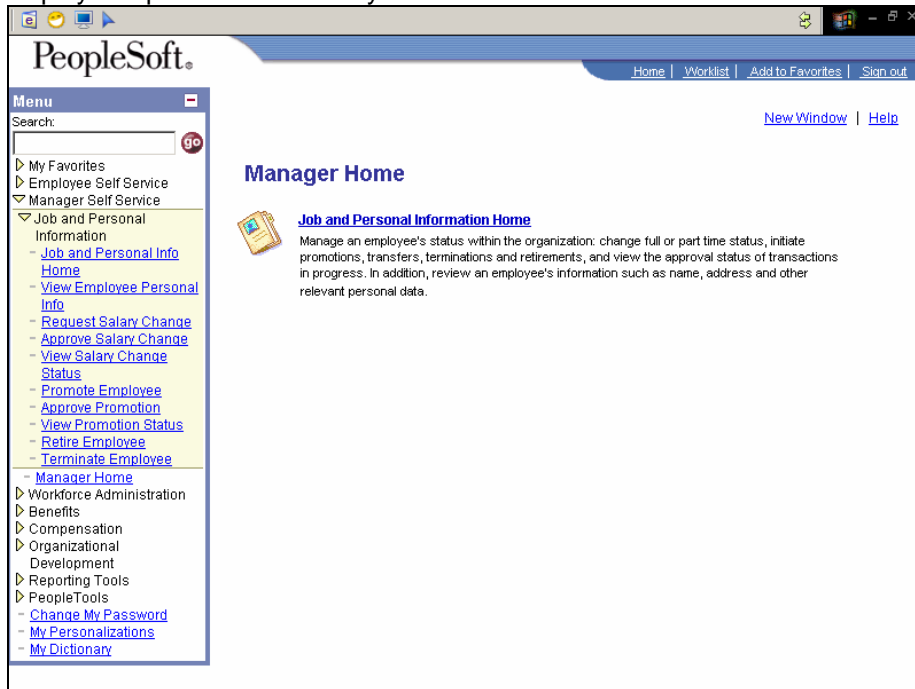
Click the "Sign In" radio button and this will bring you to the Manager Self Service page shown below:



Click on Manager Self Service.

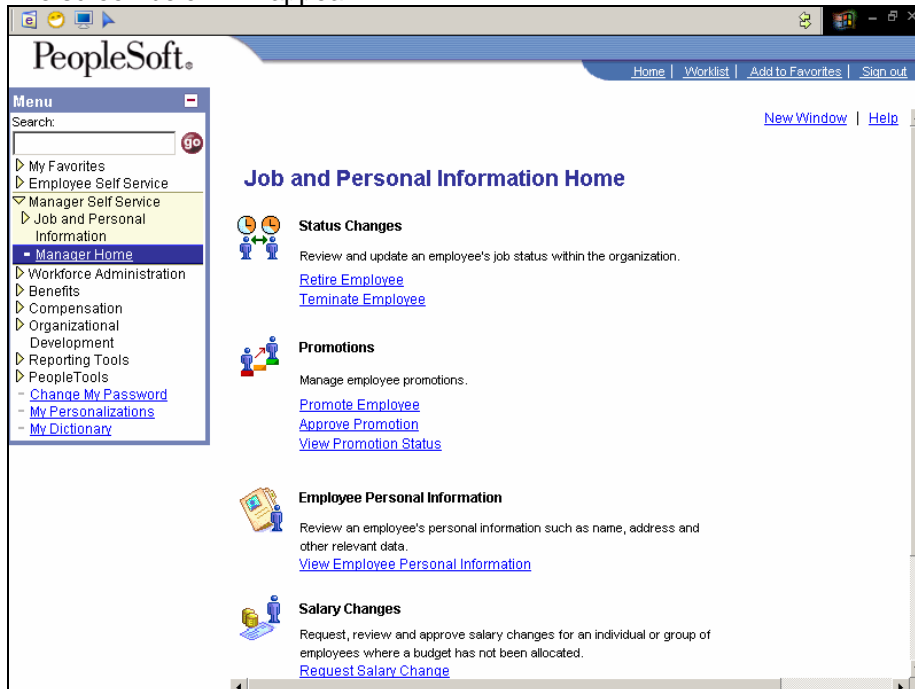


On the left side of the screen, you will see a blue box with Menu as the heading. Click on “Manager Self Service”. The yellow arrow indicates that there are options within that link. Click on the yellow arrow to display all options available to you.



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.



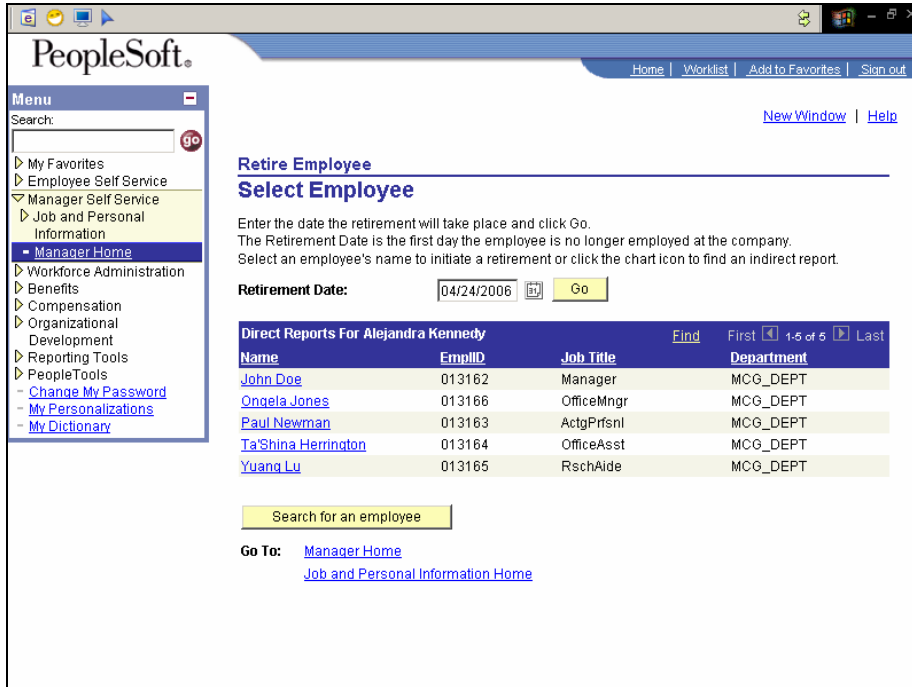
Options are:

- 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.

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.



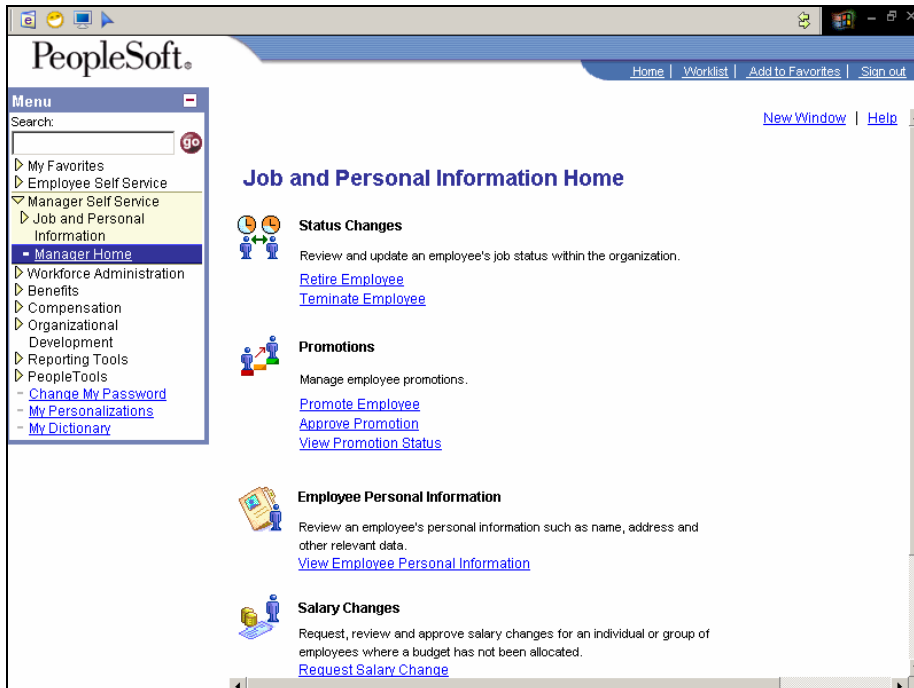
Indicate the reason for retirement, then click submit and OK.
A screen will appear with your changes.



* 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**.

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

Menu Search:

- My Favorites
- Employee Self Service
- Manager Self Service
 - Job and Personal Information
 - Manager Home**
 - Workforce Administration
 - Benefits
 - Compensation
 - Organizational Development
 - Reporting Tools
 - PeopleTools
 - [Change My Password](#)
 - [My Personalizations](#)
 - [My Dictionary](#)

Terminate Employee

Select 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.

Termination Date:

Direct Reports For Alejandra Kennedy

Name	EmpID	Job Title	Department
Ongela Jones	013166	OfficeMngr	MCG_DEPT
Paul Newman	013163	ActgPrfsnl	MCG_DEPT
Ta'Shina Herrington	013164	OfficeAsst	MCG_DEPT
Yuang Lu	013165	RschAide	MCG_DEPT

Go To: [Manager Home](#)
[Job and Personal Information Home](#)

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.

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

Menu Search:

- My Favorites
- Employee Self Service
- Manager Self Service
 - Job and Personal Information
 - Manager Home**
 - Workforce Administration
 - Benefits
 - Compensation
 - Organizational Development
 - Reporting Tools
 - PeopleTools
 - [Change My Password](#)
 - [My Personalizations](#)
 - [My Dictionary](#)

Terminate Employee

Paul Newman

The Termination Date is the first day the employee is no longer employed at the company.
Click Submit once you have entered the termination information.

Employee ID: 013163

Job Title: Accounting Professional

Termination Date: 04/24/2006

*Reason for Termination:

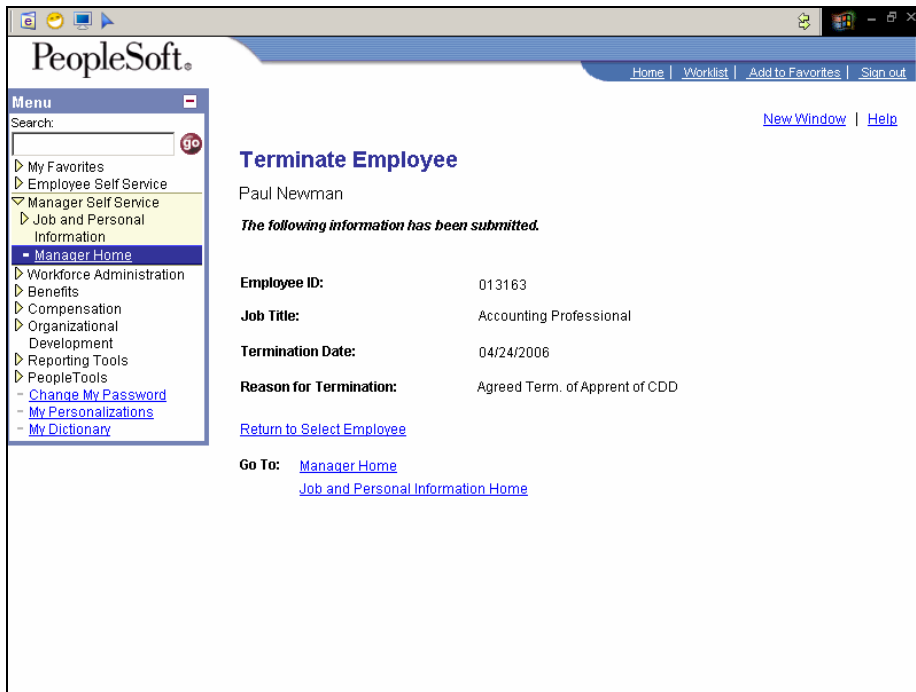
- Agreed Term. of Apprent of CDD
- Attendance
- Child/House Care
- Closing Down of Establishment
- Death
- Discharge
- Dissatisfied w/Comp. Policies
- Dissatisfied w/Fellow Employee
- Dissatisfied w/Promotion Opps
- Dissatisfied w/Type of Work
- Dissatisfied w/Work Conditions

* Required Field

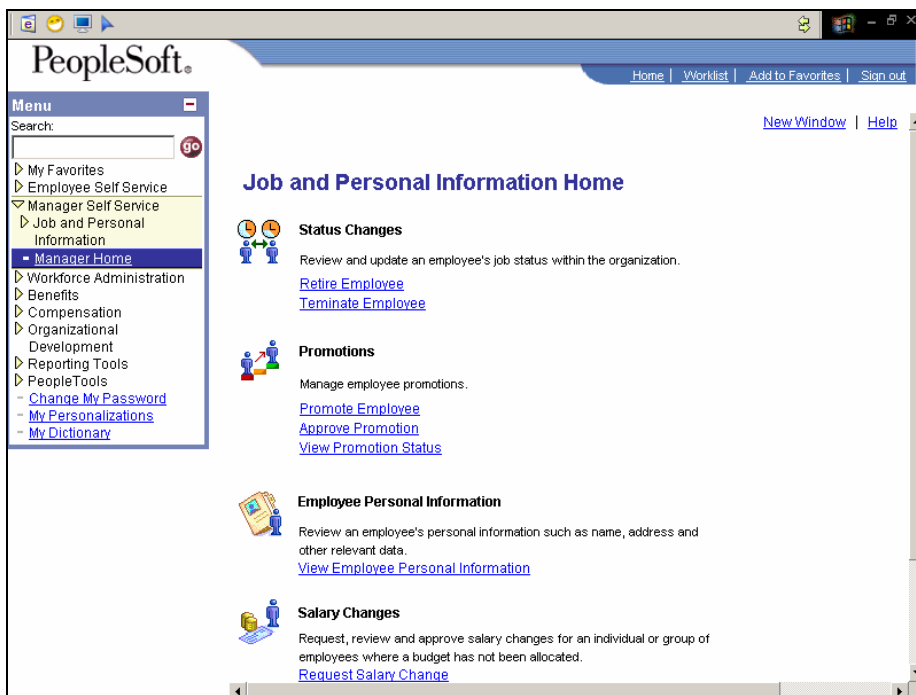
[Return to Select Employee](#)

Go To: [Manager Home](#)
[Job and Personal Information Home](#)

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 items appear under Promotions:

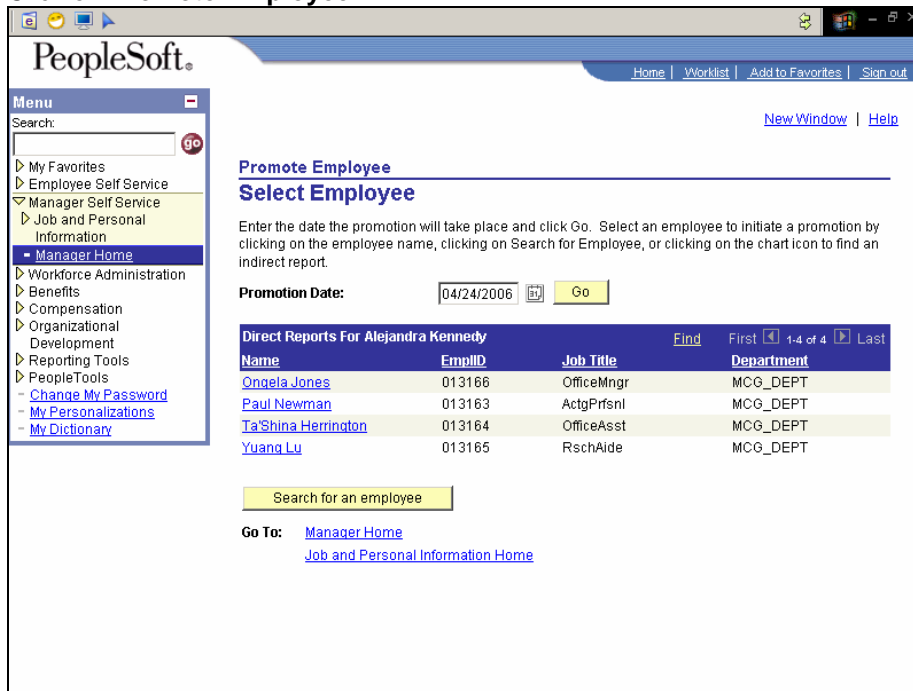
Promote Employee- Originator

*Approve Promotion - Approver

View Promotion Status- Originator and Approver

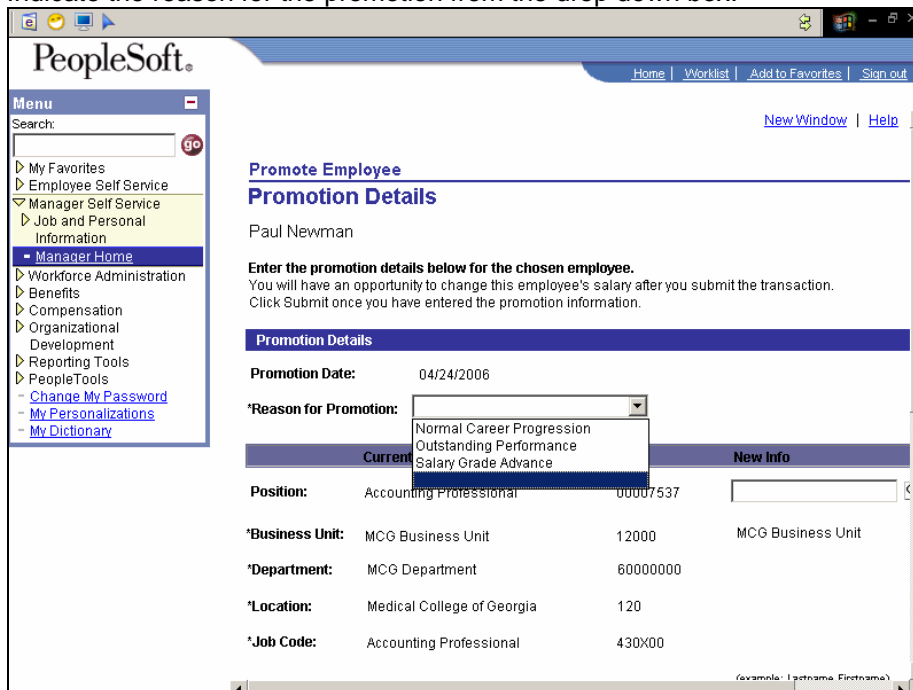
*As the originator you will not have access to Promote Employee

Click on **Promote Employee**.



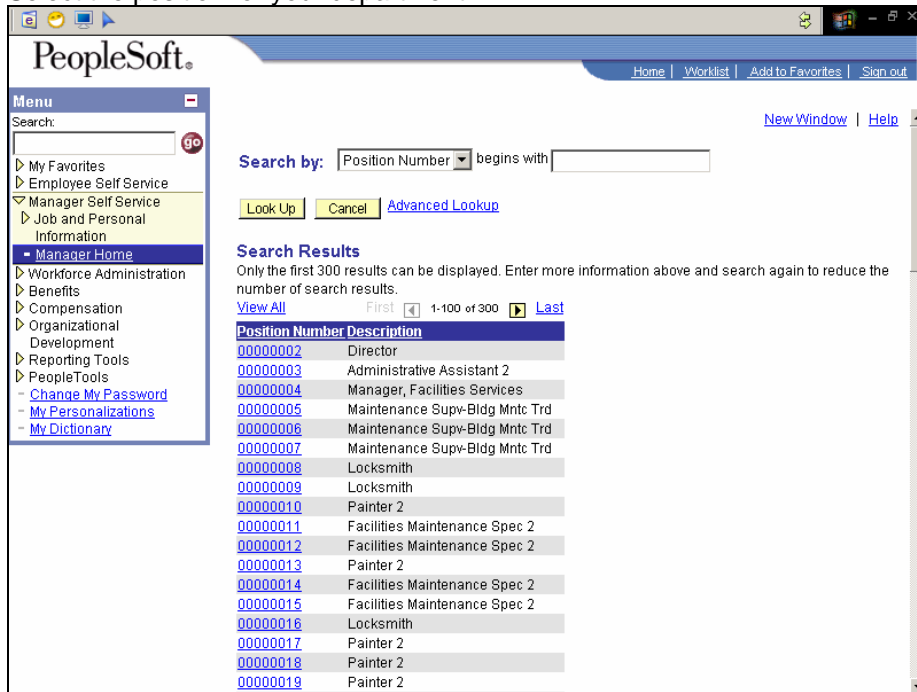
Promotions are for one pay grade to a higher pay grade within your department. Enter the date the promotion will take place and click Go. Select an employee to initiate a promotion by clicking on the employee name, clicking on Search for Employee, or clicking on the chart icon to find an indirect report.

Indicate the reason for the promotion from the drop down box.

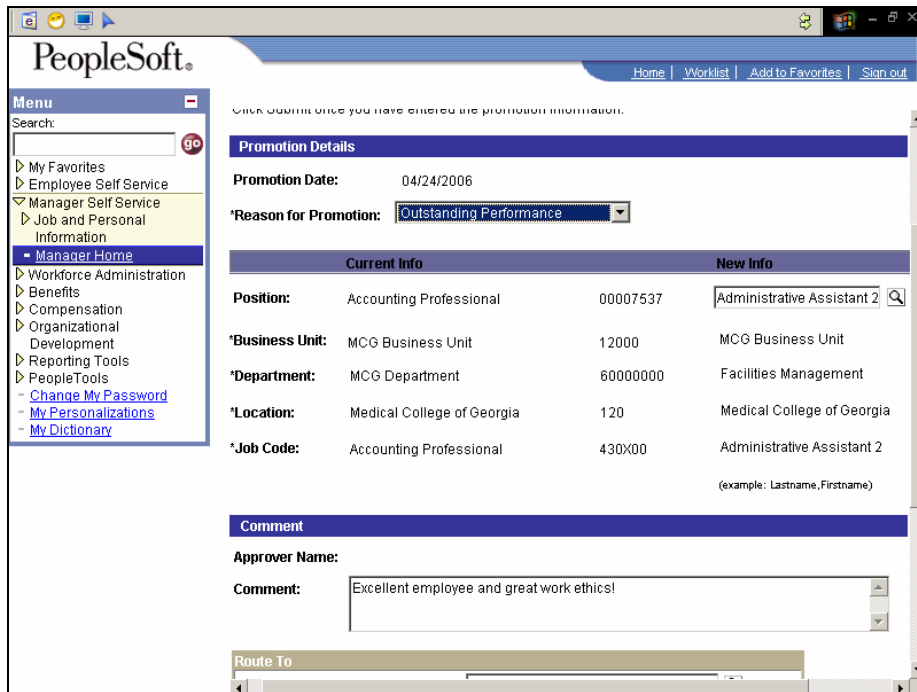


Under "New Info" type the new position title (click on the search button to the right of the box to view a list of positions). Below is an example of search results for positions.

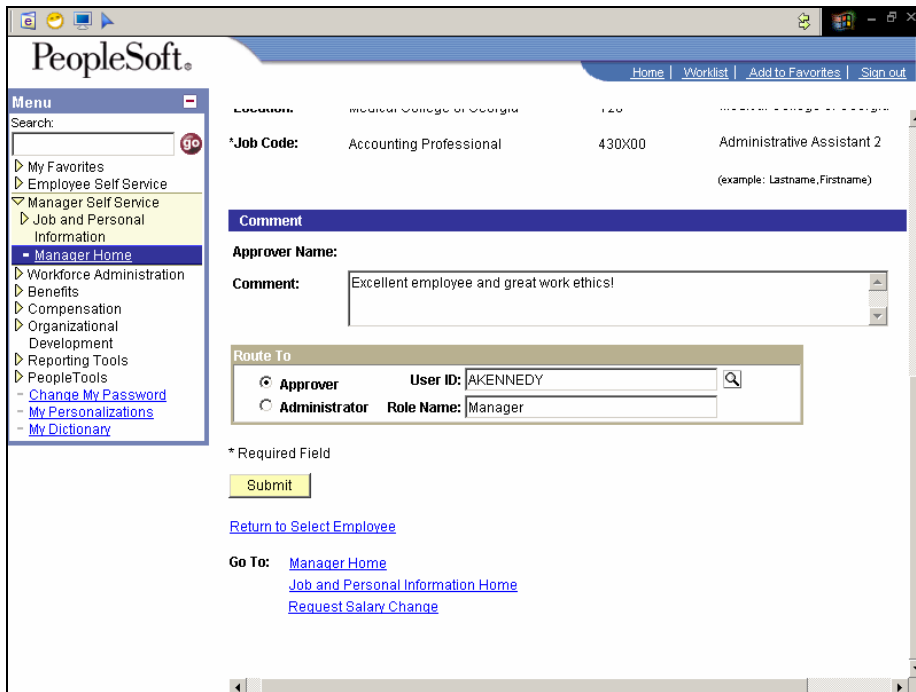
Select the position for your department.



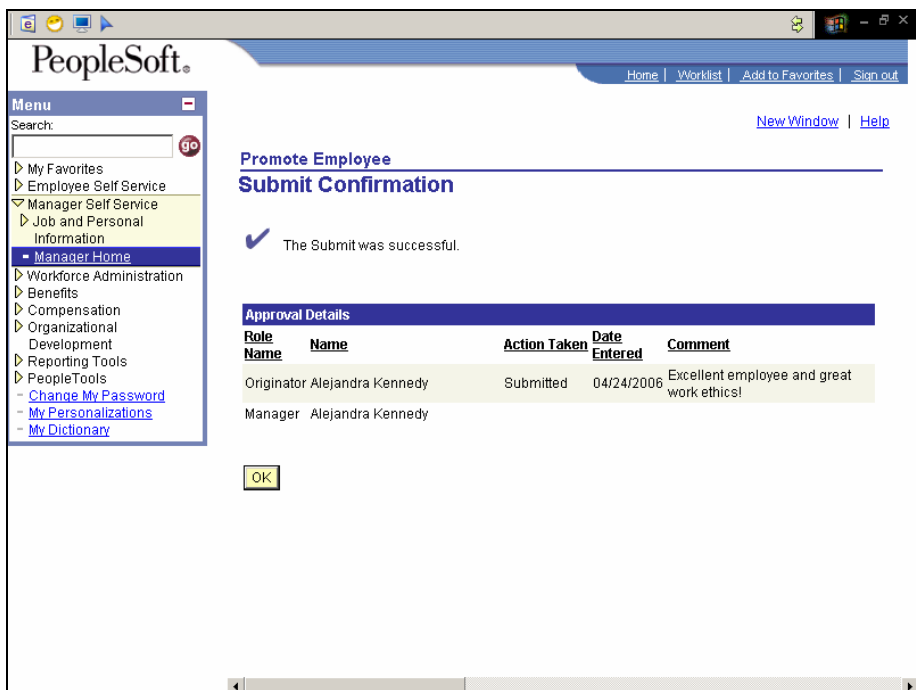
Under the comment section, write your comments on why this individual should be promoted.



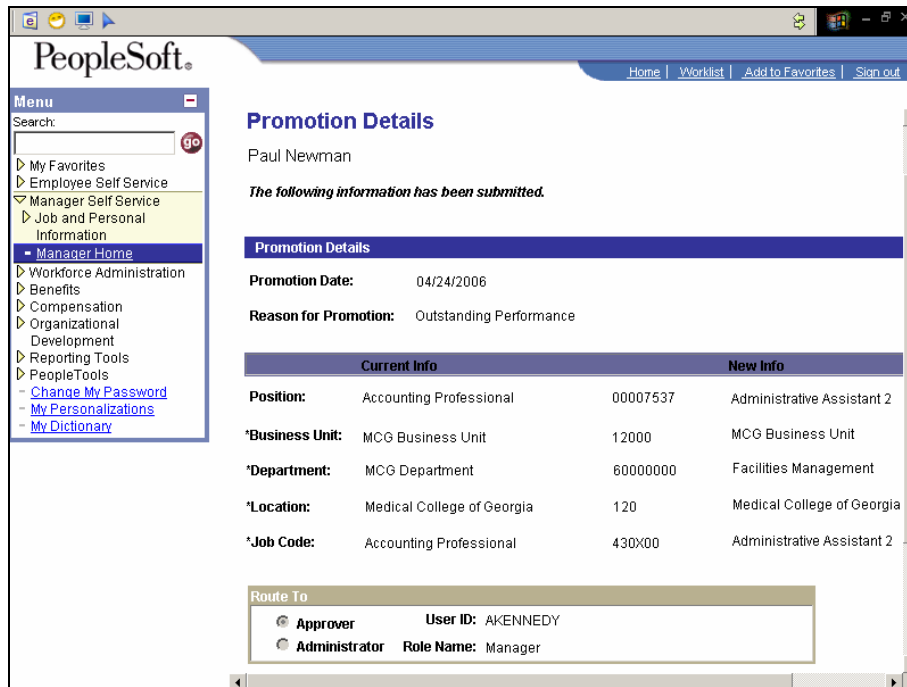
If you are routing this transaction to be approved, click on Approve. Type in the *approver's ID (MMOUSE for Mickey Mouse), and their Role Name (title) You can click on the search icon to view a list of approvers. * If you are unsure who your approver is, contact your immediate supervisor or the HR Processing Manager at 721-0961.



Click Submit.

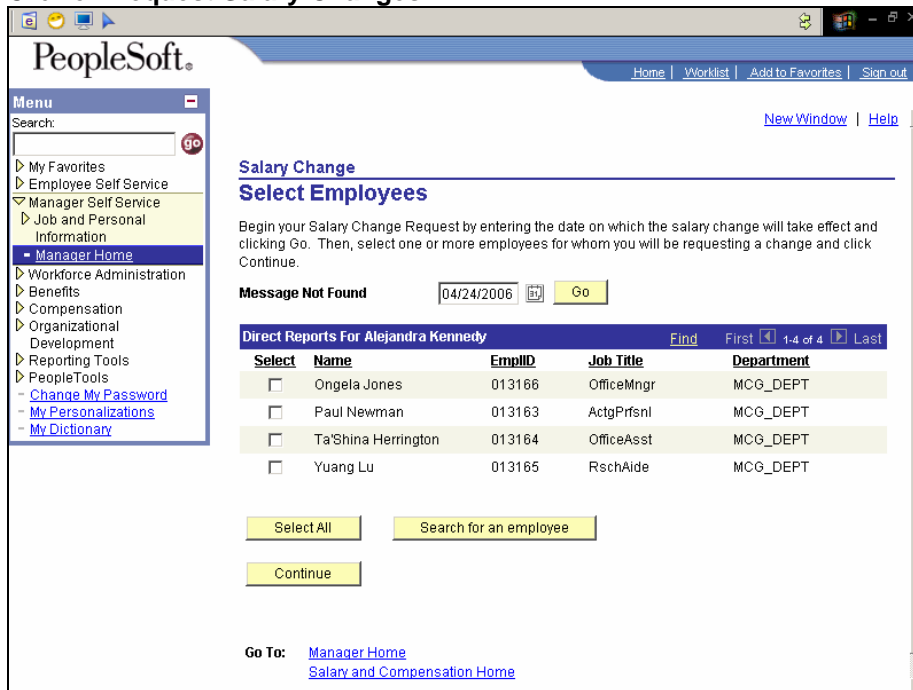


Click OK to view your request.

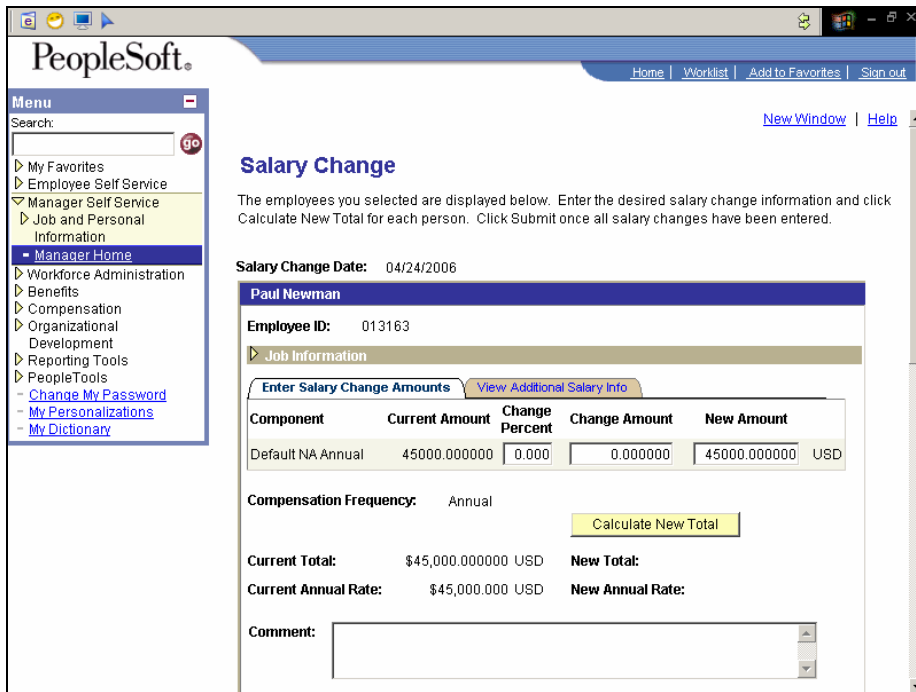


You can select to return to **Return to Select Employee, Manager Home, Job and Personal Information Home or Request Salary Changes.**

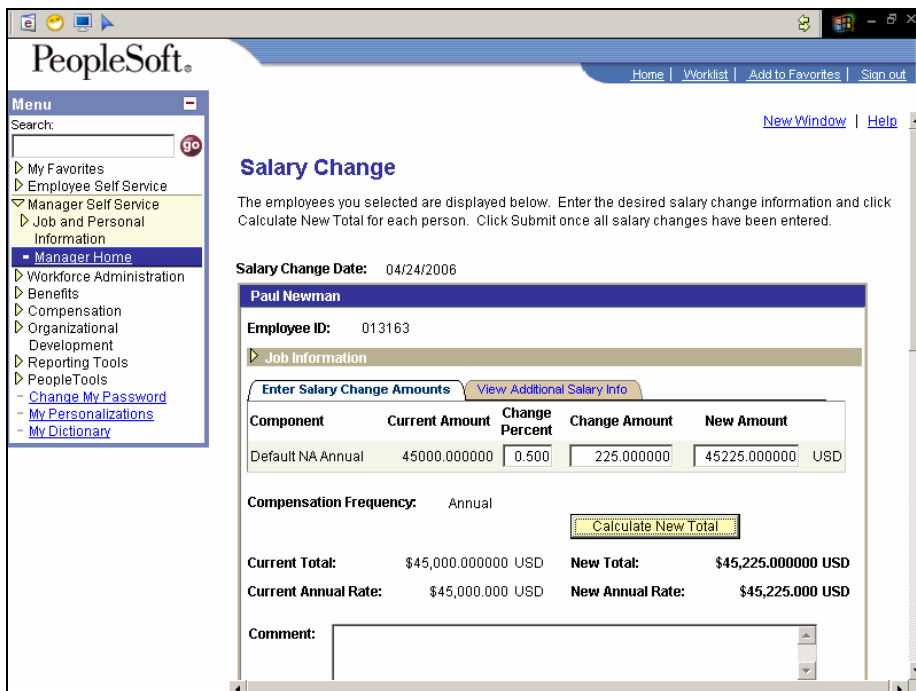
Click on **Request Salary Changes.**



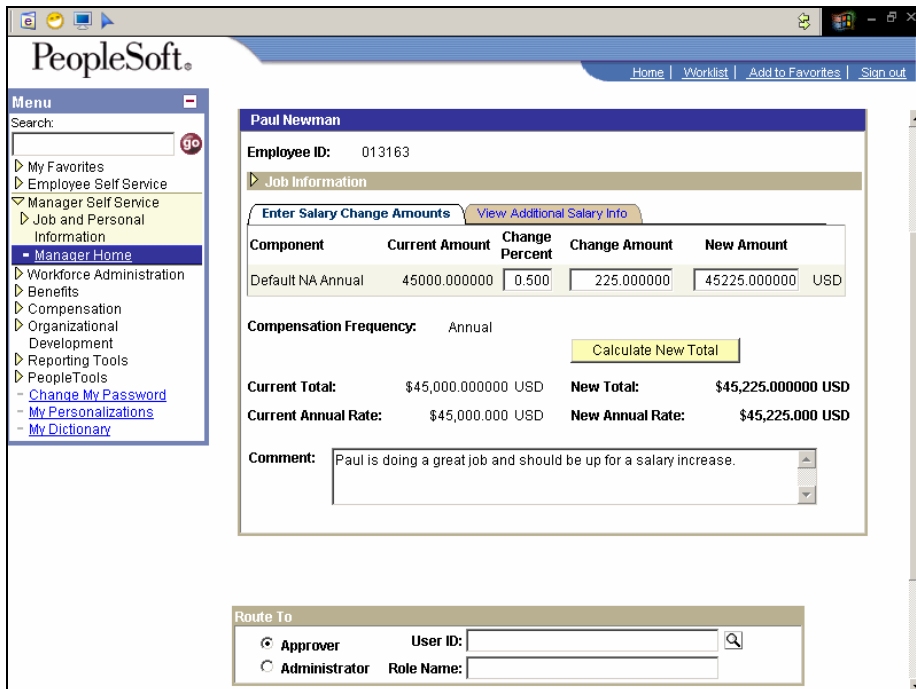
Begin your Salary Change Request by entering the date on which the salary change will take effect and clicking Go. Then, select one or more employees for whom you will be requesting a change and click Continue.



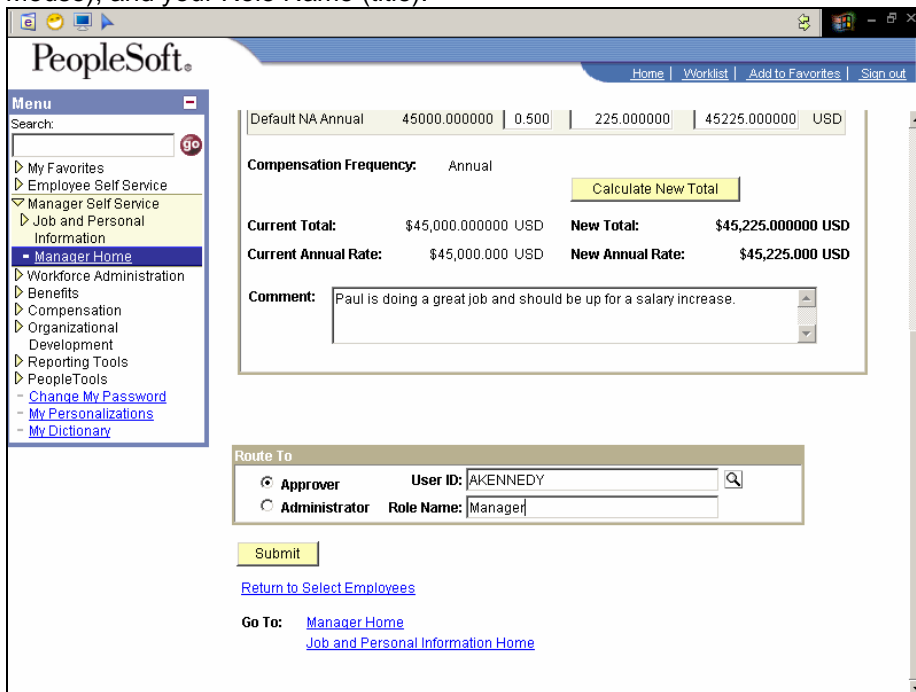
Enter the desired salary change information and click Calculate New Total for each person. You can change the percent, amount or new amount.



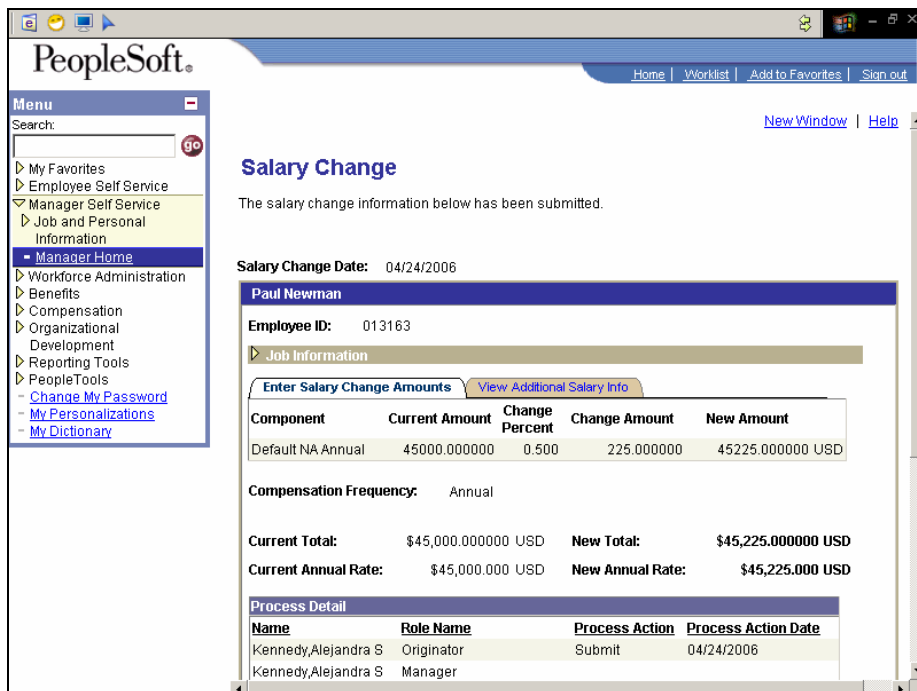
You can type your comments in the comment box.



If you routing this transaction to be approved, click on Approve. Type in your ID (M MOUSE for Mickey Mouse), and your Role Name (title).

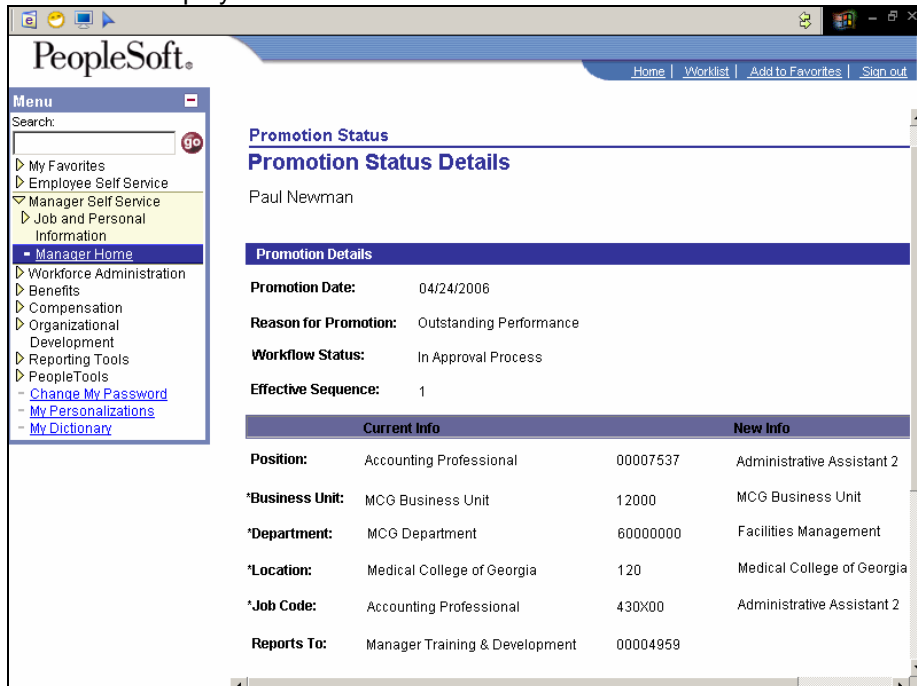


Click Submit then OK to view your request.



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**.

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.



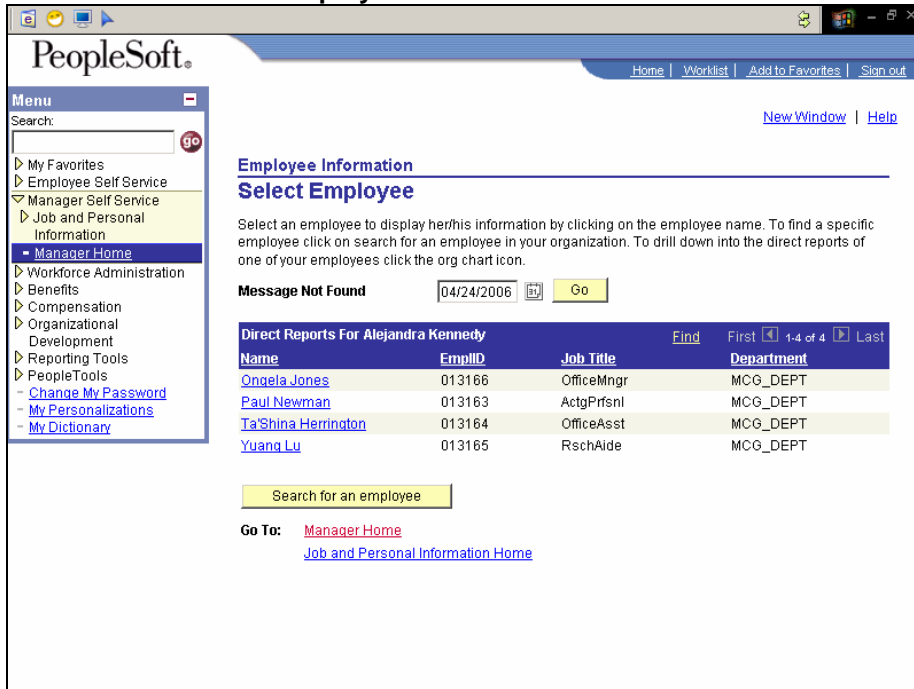
The promotion status details will display the status of the promotion and which administrator is in the process of approving, denying, or rerouting the transaction.

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:

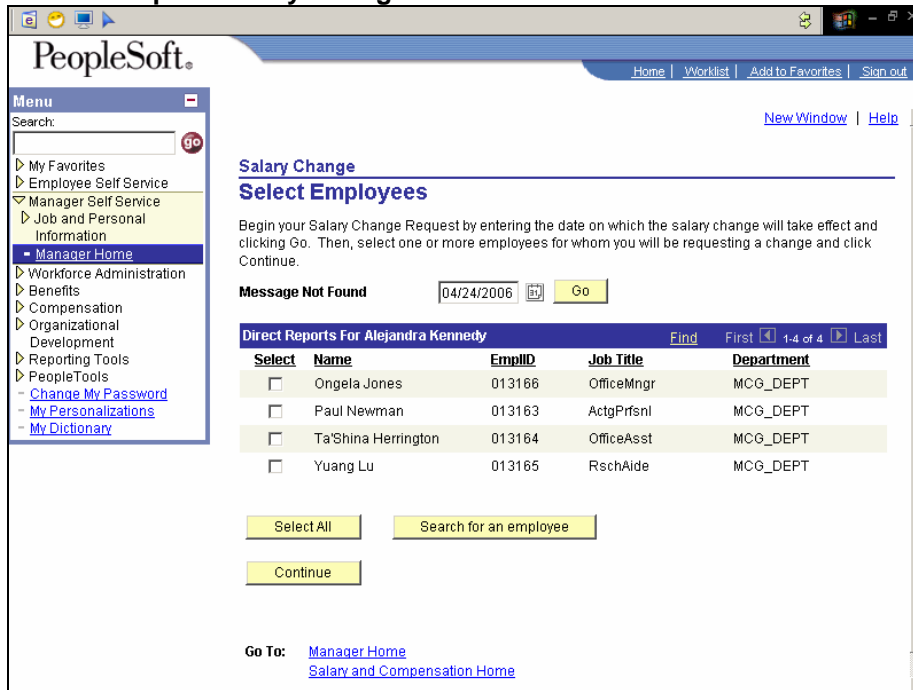
Request Salary Change

Approve Salary Change

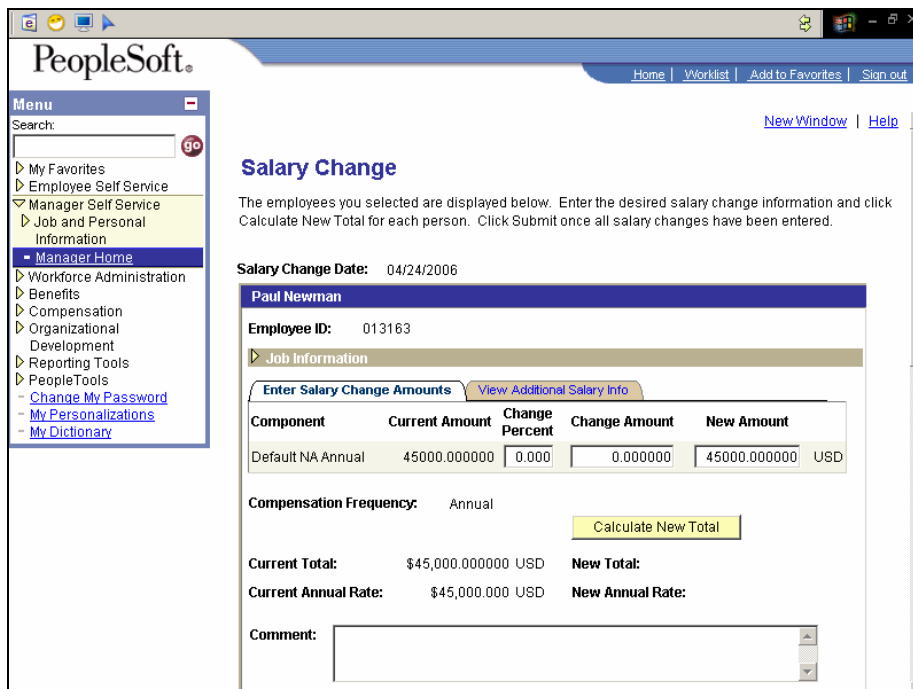
View Salary Change Status

*As the originator you will not have access to Approve Salary Change

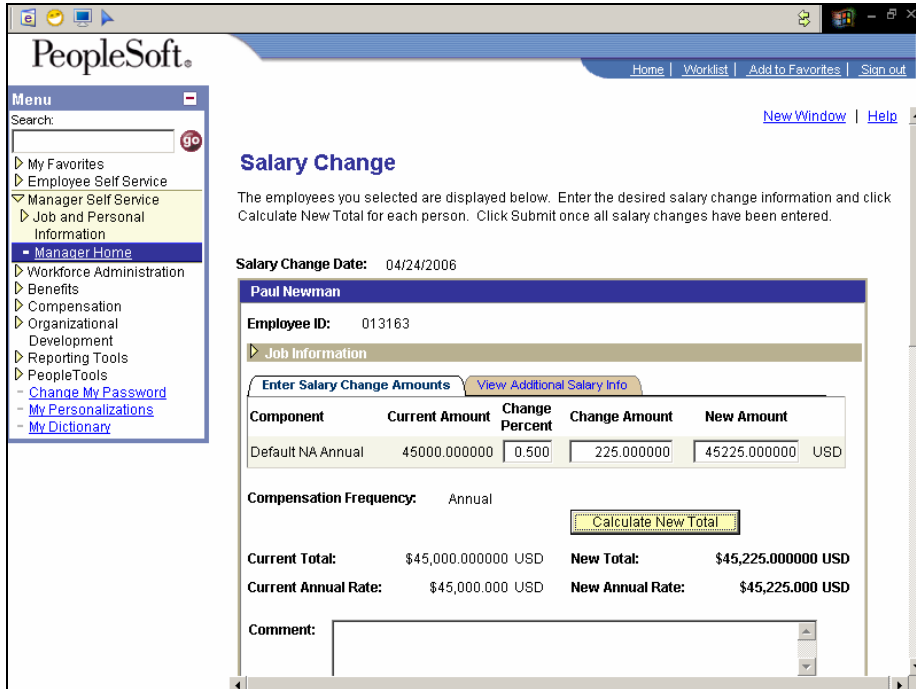
Click on **Request Salary Changes**.



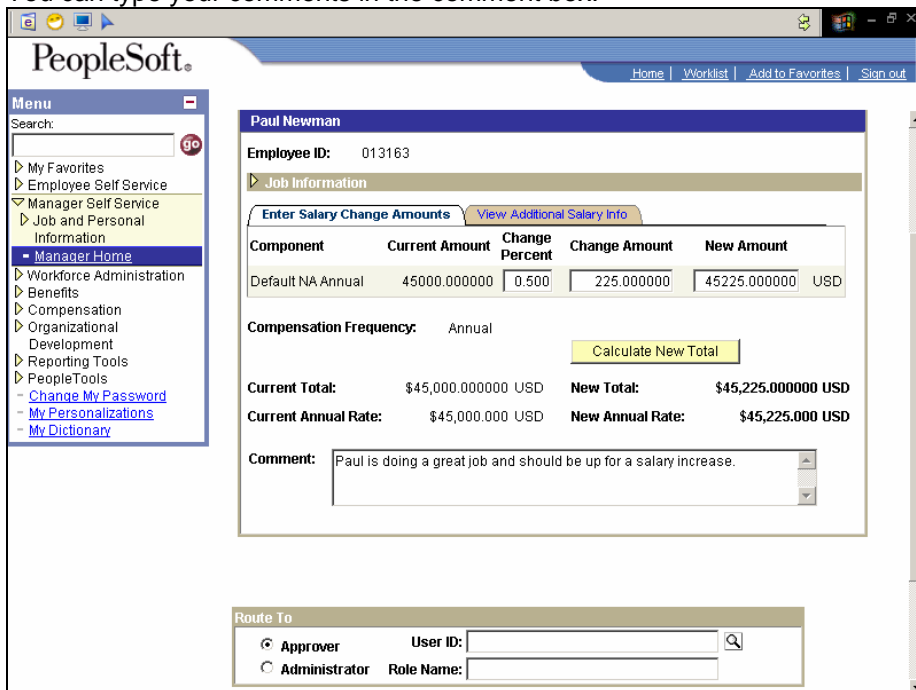
Begin your Salary Change Request by entering the date on which the salary change will take effect and clicking Go. Then, select one or more employees for whom you will be requesting a change and click Continue.



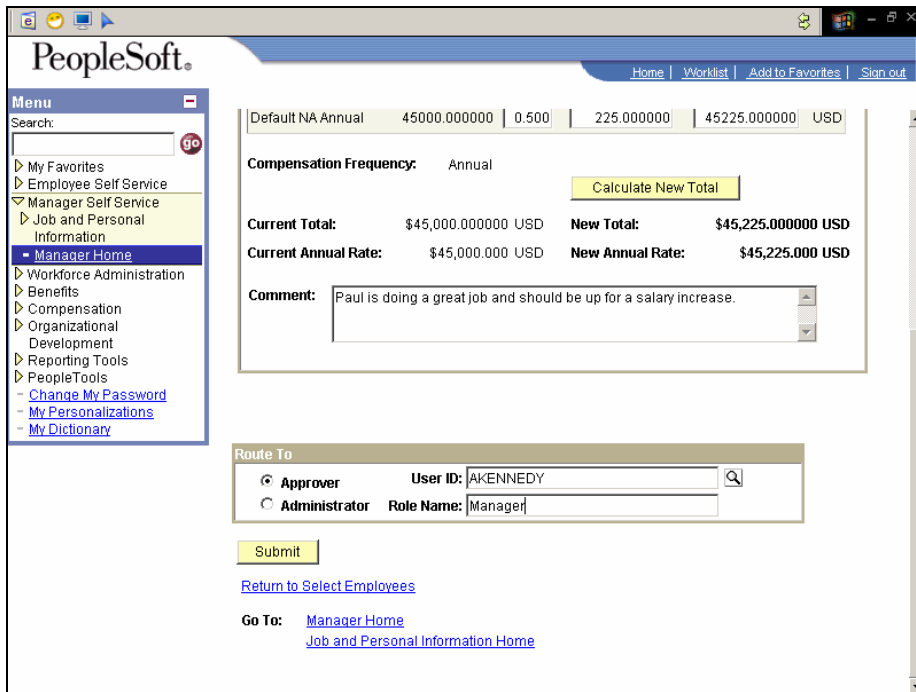
Enter the desired salary change information and click Calculate New Total for each person. You can change the percent, amount or new amount.



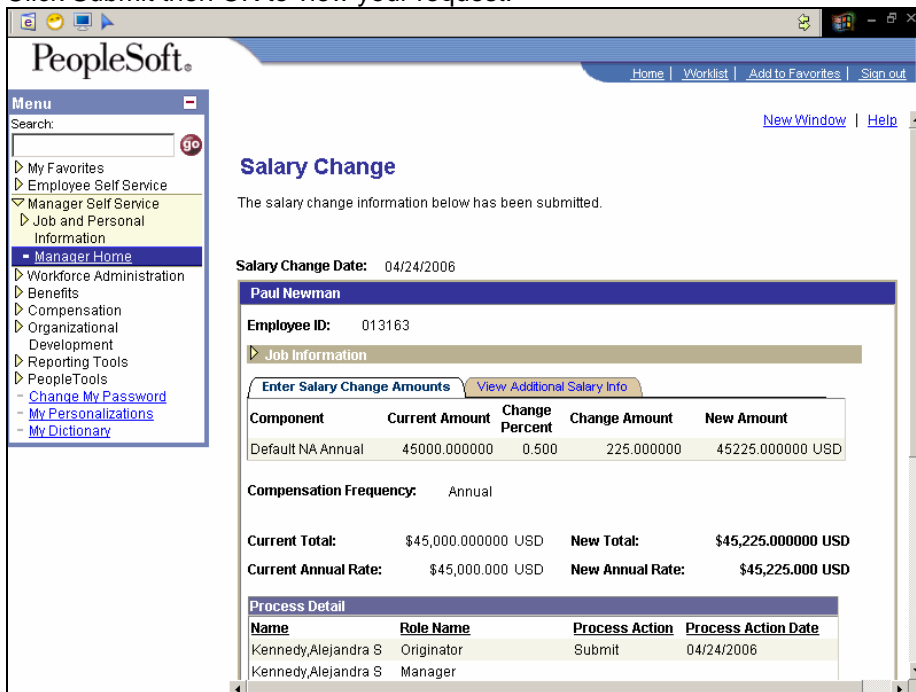
You can type your comments in the comment box.



If you routing this transaction to be approved, click on Approve. Type in your ID (MMOUSE for Mickey Mouse), and your Role Name (title).



Click Submit then OK to view your request.



Click Submit then OK to view your request.

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

Menu
 Search: go
 My Favorites
 Employee Self Service
 Manager Self Service
 Job and Personal Information
Manager Home
 Workforce Administration
 Benefits
 Compensation
 Organizational Development
 Reporting Tools
 PeopleTools
 Change My Password
 My Personalizations
 My Dictionary

Salary Change
 The salary change information below has been submitted.

Salary Change Date: 04/24/2006

Paul Newman

Employee ID: 013163

Job Information

Enter Salary Change Amounts | View Additional Salary Info

Component	Current Amount	Change Percent	Change Amount	New Amount
Default NA Annual	45000.000000	0.500	225.000000	45225.000000 USD

Compensation Frequency: Annual

Current Total: \$45,000.000000 USD New Total: \$45,225.000000 USD
 Current Annual Rate: \$45,000.000 USD New Annual Rate: \$45,225.000 USD

Process Detail

Name	Role Name	Process Action	Process Action Date
Kennedy,Alejandra S	Originator	Submit	04/24/2006
Kennedy,Alejandra S	Manager		

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.**

Click on View Salary Changes. You will be able to view all the status of all the salary changes and requests.

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

Menu
 Search: go
 My Favorites
 Employee Self Service
 Manager Self Service
 Job and Personal Information
Manager Home
 Workforce Administration
 Benefits
 Compensation
 Organizational Development
 Reporting Tools
 PeopleTools
 Change My Password
 My Personalizations
 My Dictionary

[Salary Change 7](#)

Submitted By: Kennedy,Alejandra S Submitted Date: 04/24/2006

EmpID	Name	Description	Last Process Action	Last Processed By
013163	Newman,Paul B	Accounting Professional	Approve	Kennedy,Alejandra S
013163	Newman,Paul B	Accounting Professional	Approve	Kennedy,Alejandra S

[Salary Change 7](#)

Submitted By: Kennedy,Alejandra S Submitted Date: 04/24/2006

EmpID	Name	Description	Last Process Action	Last Processed By
013163	Newman,Paul B	Accounting Professional	Approve	Kennedy,Alejandra S
013163	Newman,Paul B	Accounting Professional	Approve	Kennedy,Alejandra S

