HR Self Serve Training Manual

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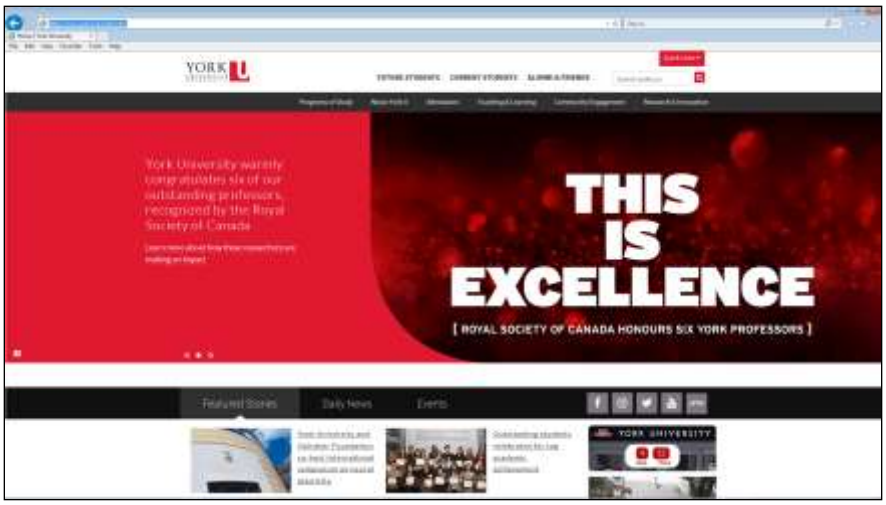
Introduction to Employee Self Service

1. Getting Started

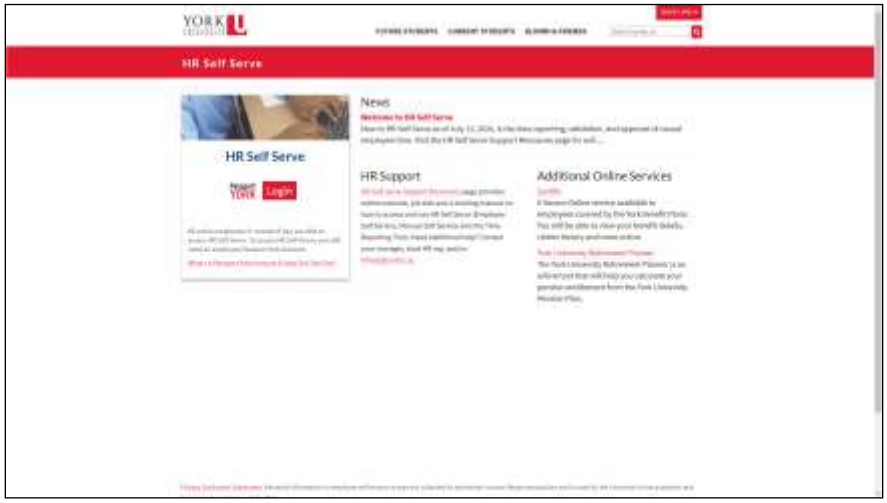
1.1 Accessing HR Self Serve

Learning Objectives:
At the end of this tutorial, you should be familiar with how to Login to HR Self Serve.

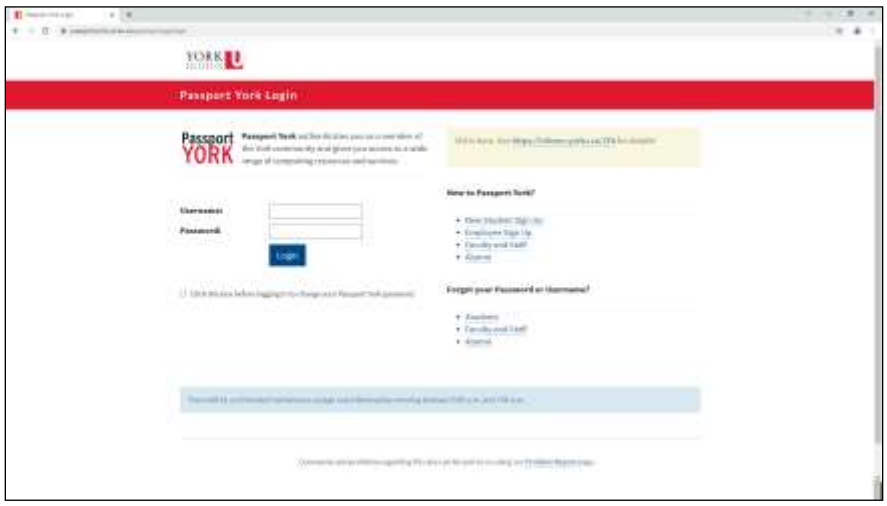
Procedure

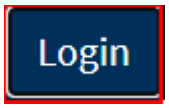


Step	Action
1.	To sign into HR Self Serve, click in the **Address** field of the web browser. Enter the URL "**https://hrselfserve.yorku.ca**" and click the Enter key on your keyboard.
2.	The *HR Self Serve page* appears. **Note:** There is a link to the HR Self Serve **Support Page** with online resources such as Job Aids and links to online training courses.



Step	Action
3.	You must have a valid York Passport ID to access HR Self Serve. If you do not have a Passport ID, there is a link on the page with instructions on how to obtain one. In this scenario, you are George Clooney with a Passport York ID. Click the **Login** button. Login



Step	Action
4.	Enter your York Passport ID. In this example, you are George Clooney. Enter "**gclooney**" in the **User ID** field.
5.	Note that Passport York Username and Password fields are case sensitive. Check that **Caps Lock** is not active.
6.	Enter your password into the **Password** field. Type "12345" and press **Enter.**
7.	Click the **Login** button. 
8.	After login, you will see the Self Serve Home Page. Depending on your role, this will be either Employee Self Service or Manager Self Service. In this example, George Clooney is a manager, so the home page is Manager Self Service.
9.	For security purposes, the system logs you out after a period of inactivity. Two minutes prior to your session timeout, a warning will appear that your session is about to expire.
10.	**End of Procedure.**

2. Basic Navigation

2.1 Navigation in Employee Self Service

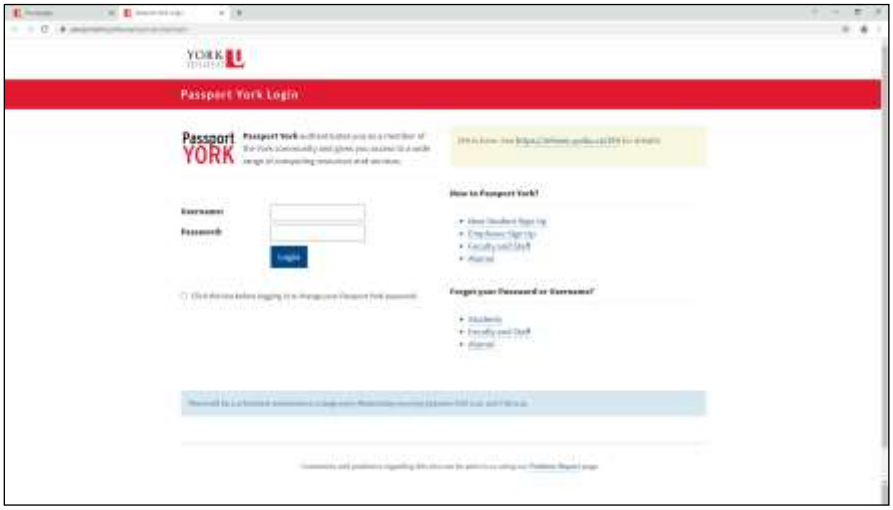
Learning Objectives:

In this tutorial, you will:
- become familiar with basic navigation elements in Employee Self Service such as Pages and Buttons,
- be able to navigate to different Pages and return to the Home Page,
- locate the Help tutorials and,
- know how to Sign Out.

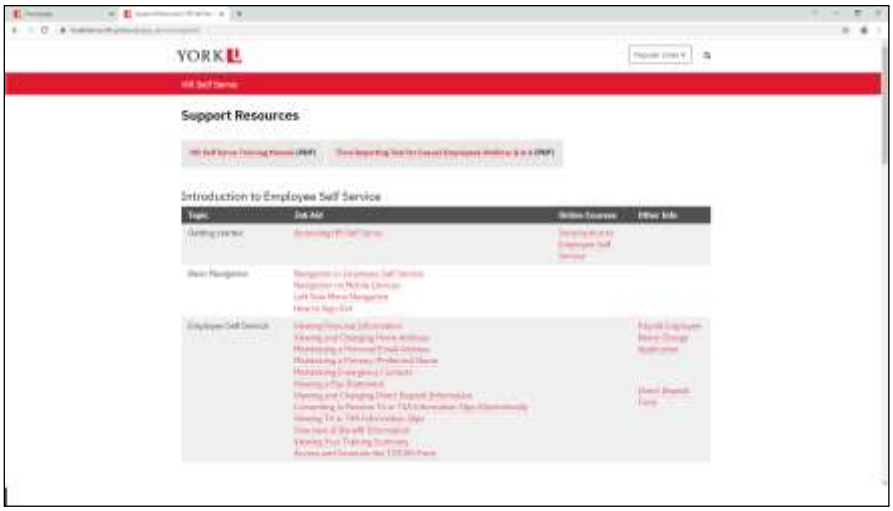
Procedure

Step	Action
1.	Access to Employee Self Service in the Peoplesoft is based on a user interface called **Fluid**. The **Fluid** interface is similar on desktops, laptops, and mobile devices. The **Fluid** interface has: **Pages**, which are a collection of elements, such as this landing page, and **Menus** that allow you to select an action or new page. The **Pages** and **Menus** that you have access to will depend upon your role at York.
2.	The **Fluid i**nterface uses **Pages** to organize content. A **Page** has several elements: **Page Name,** such as **Employee Self Service** **Buttons,** such as **Home**, and **Tiles,** such as **Training Profile** that navigate to a new page. The **Page Name** appears in the header. If you have access to several pages, selecting the **Page Name** will provide a drop-down menu of other pages. **Buttons** appear in the upper right-hand corner of the page. **Buttons** always include: **Home** and the **Action List**. **Tiles** appear in the main area of the **Page**. The **Tiles** navigate to **Subpages**.
3.	**Buttons:** Several buttons appear in the upper right-hand corner of a page. Regardless of where you are in Employee Self Service, the **Home** button will always take you to your **Home Page.**

Step	Action
4.	**Buttons:** The **Actions List** button will display a menu of available actions. Click the **Actions List** button.
5.	**Buttons:** The **Actions List** always includes online **Help** and **Sign Out.** Additional actions may appear based on your role and the page that you are on. Click the **Help** link.

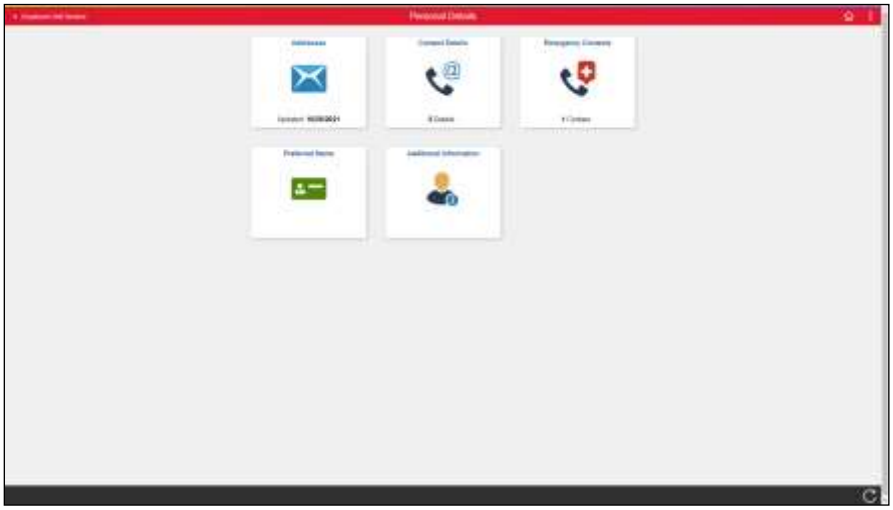


Step	Action
6.	The online help is available on a related web service. This is the same service that provides access to Employee and Manager Self Service training modules. The first time that you access online Help, you will need to enter your York Passport credentials to register. In this example, you are Chris Pine, with a login of cpine. Enter your passport name into the **User Name** field. Enter "**cpine**".
7.	Enter the **Password** "**12345**".



Step	Action
8.	The list of Help tutorials appears. When you are finished viewing Help, click the **Close Tab** button.

Step	Action
9.	**Tiles** are used to organize content. They appear in the middle of a page. Some **tiles** have active information. In this screen, the **last pay date** is on the **Payroll and Compensation** tile. Each **tile** is like a selectable button. If you select the tile, it will take you to a **subpage**. In this example, you want to check your business mailing address. For this, you will navigate to the **Personal Details** subpage. Click the **Personal Details** tile.
10.	The personal details page appear. Note: additional tiles appear and you can view/edit your: **Addresses (Home & Business)** **Contact Details** **Emergency Contacts** **Preferred Name** **Additional Information**



Step	Action
11.	When on a subpage, you can return to the prior page using the **Back** button in the upper left-hand side of a subpage. If there is sufficient room, the name of the prior page will appear. In this example, the name of the prior page is **Employee Self Service.** Return to the prior page. Click the **Back** arrow.
12.	**End of Procedure.**

2.2 Navigation on Mobile Devices

Learning Objectives:

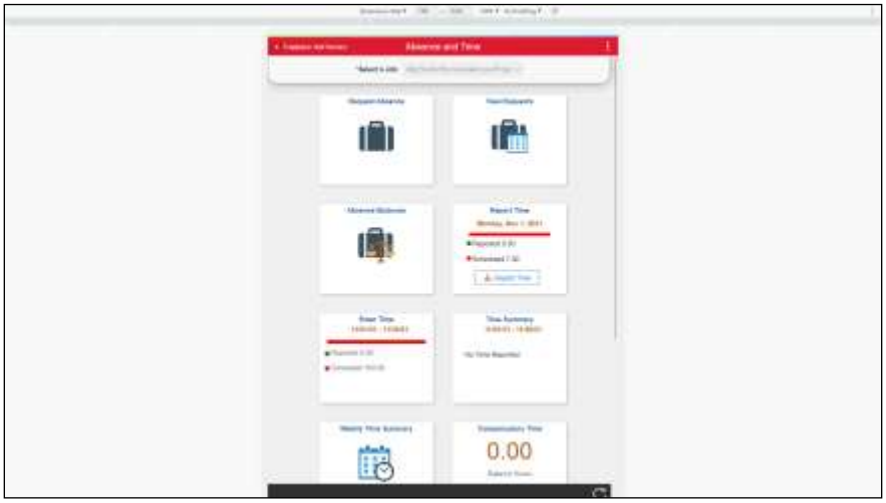
In this tutorial, you will become familiar with how basic navigation elements of HR Self Serve change based on the screen size of a mobile device.

Procedure

Step	Action
1.	The **Peoplesoft** interface will change based on the size of the screen being used. On mobile devices, such as iPads and smartphones, the size of the device screen is smaller than that of a laptop or desktop. **Note: T**he tiles will be realigned to accommodate smaller screen size. In this scenario, this screen size is like an iPad or small tablet.

Step	Action
2.	On a smaller screen, all of the buttons will not fit. Some functions associated with buttons may move to the **Action list**. For example, the **Home** button is no longer visible. To find the navigation to **Home**, open the **Actions List** Click the **Actions List** button.
3.	Note that the **Actions List** now has the option to go Home. Click on the **Home** link. Home

Step	Action
4.	The **Page Name** is **Manager Self Service** which is the **Home** page. Selecting the **Page Name** will provide a list of other pages available to you. Navigate to **Employee Self Service.** Click the **Page Name** object.
5.	Click the **Employee Self Service** link.
6.	The **Page Name** has changed to **Employee Self Service.** Navigation on subpages may also change to accommodate smaller screen sizes. We will look at an example. Click the **Absence and Time** tile.
7.	The **Absence and Time** page appears with subtiles. **Note:** the page can adjust to smaller screen sizes and you will need to scroll down to view remaining subtiles.



Step	Action
8.	When on a subpage, such as **Absence and Time**, you can return to the prior page using the **Back** button in the upper left-hand side of a subpage. In this example, the prior page is **Employee Self Service.** On a small device, there is no room for the full name of the prior page; only the back arrow appears. Return to the prior page. Click the **Employee Self Service** link.

Step	Action
9.	You can return to the **Manager Self Service** page by selecting **Home** from the **Actions List**. Click the **Actions List** button.
10.	Click the **Home** link.
11.	**End of Procedure.**

2.3 How to Sign Out

Learning Objectives:

In this tutorial, you will know how to locate and use Sign Out

Procedure

Step	Action
1.	Click the **Actions List** button.

Step	Action
2.	Click the **Sign Out** link.
3.	**End of Procedure.**

3. Employee Self Service

3.1 Overview of Employee Self Service

Employee Self Service enables York employees to review and submit changes to their own personal information. It also enables the reporting of Time, such as overtime, and Absences, such as vacation.

Learning Objectives:

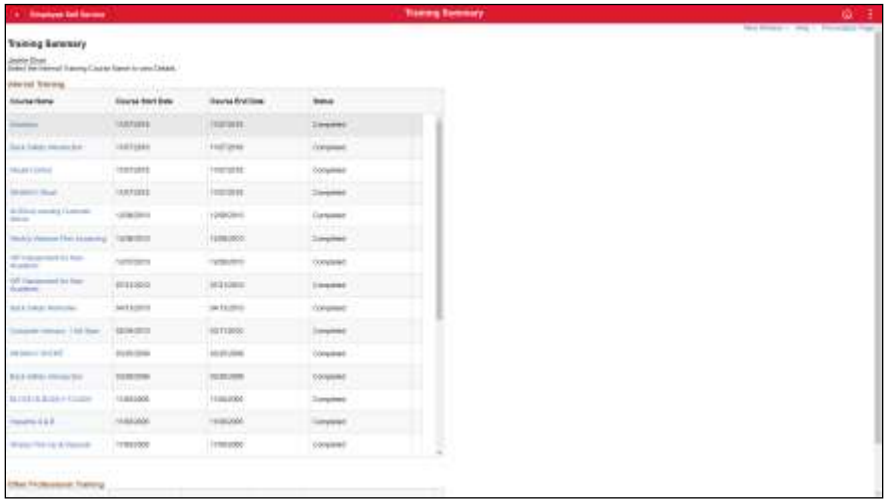
In this tutorial, you will have an overview of **Employee Self Service** and become familiar with:
- Personal Details,
- Payroll and Compensation,
- Benefits,
- Training Profile,
- Absence and Time, and
- Manage Delegation.

Procedure
In this tutorial, you will know how to locate and use Sign Out

Step	Action
1.	Will start with the first tile, click the **Delegations** tile.
2.	The functions available on the **Delegations** page depend upon your role. You may be able to delegate some of your management tasks, for example, during vacation or you may receive requests to act on behalf of a manager during an absence. **Note:** The Delegation tutorial is included in the Manager Self Service tutorials.

Step	Action
3.	You can return to the **Home** page several ways: - using the **Back** button, in the upper left-hand side of the page, or - using the **Home** button, in the upper right- hand side of the page. Click the **Home** button.
4.	Click the **Absence and Time** tile.
5.	The **Absence and Time** collection allows you to: - Request an **Absence**, such as vacation, - **View** the status of any request that you have made, - View your vacation, sick, and other **Absence balances**, - Use **Report Time**; a simplified time reporting tool for mobile devices, - **Enter Time** such as overtime on a desktop or a laptop, - Review your daily and/or weekly **Time Summary**, - View your **Compensatory Time** balances such as overtime, and - Review any potential errors (i.e **Exceptions**) in the time that you have reported.
6.	Click the **Home** button.

Step	Action
7.	Click the **Personal Details** tile.
8.	The **Personal Details** page allows you to: - access your home and campus **Addresses** and request a change to your home address (if necessary), - update **Contact Details**, such as your personal phone and email, - specify your **Preferred Name** for general communication, - update your **Emergency Contacts**, and - check **Additional Information** such as your recorded birthday.
9.	Click the **Home** button.
10.	Click the **Benefit Details** tile.
11.	The **Benefits** page allows you to: - View **Dependent/Beneficiary** Coverage - View your **Health Care Dependent** Summary - View your **Insurance Beneficiary** Summary - View **Dependent/Beneficiary** Info, and - View your **Benefits Summary**
12.	Click the **Home** button.
13.	Click the **Training Profile** tile.



Step	Action
14.	On the **Training Profile** page you can view a summary of courses on your employment record. Click the **Home** button.
15.	Click the **Payroll and Compensation** tile
16.	On the **Payroll and Compensation** page you can: - view a **Pay** statements, - provide **T4/T4A Consent** to access online, - view your **T4/T4A Slips**, - view and/or update your **Direct Deposit** information, - and view your **T2200S Forms**.
17.	Click the **Home** button.
18.	You have completed the overview of **Employee Self Service**. **End of Procedure.**

3.2 Viewing and Changing Home Address

Personal and business Address information is available on the Addresses tile of Personal Details in Employee Self Service.

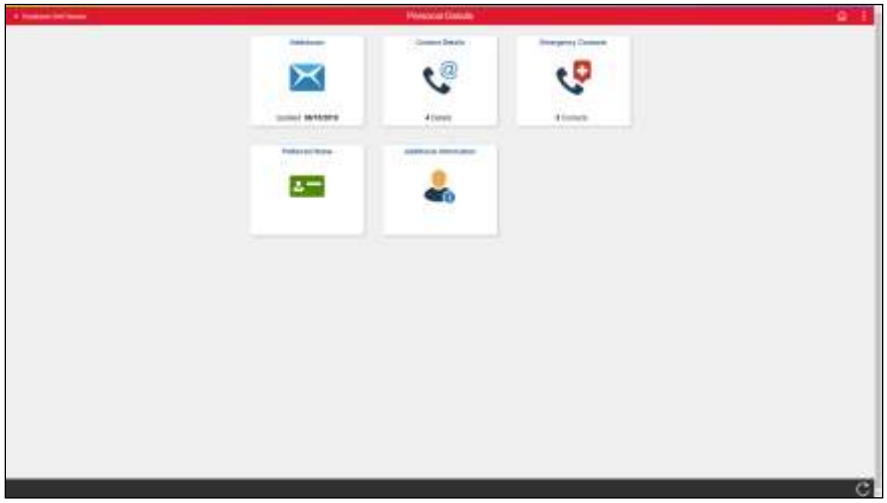
The Addresses tile can be used to view and submit future changes to your home address information.

Learning Objectives:

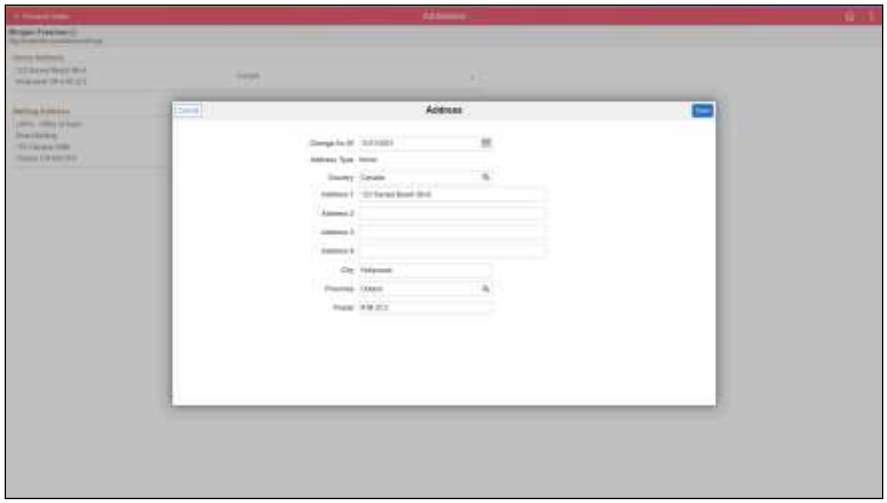
In this tutorial, you will learn how to submit a change to your home address.

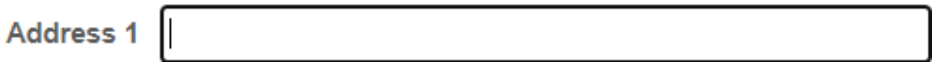
Procedure

Step	Action
1.	Your personal address is available from the **Personal Details** tile. Click the **Personal Details** tile.



Step	Action
2.	The **Personal Details** page displays your **Home Address** and campus **Mailing Address under the Addresses tile.** Note: The **Mailing Address** is your campus business address. York employees are not able to edit their campus mailing address using Employee Self Service. Contact your hrhelp@yorku.ca to initiate a change. Click the **Addreses** tile.
3.	The Addresses page appears. To modify the home address, navigate to the details of the address. Click the **Home Address link** link.



Step	Action
4.	The current date, November 1 defaults as the **Change As Of** date. The **Change As Of** date can be the current or a future date. It cannot be retroactive. In this example, we will enter a future date of November 8. To change the date, open the calendar. Click the **Calendar** button.
5.	Select November **8.**
6.	The date has changed to November 8. Natalie is moving to 4700 Keele Street. Click in the **Address 1 Field**. Enter the new address of "**4700 Keele St.**" or press **Enter.** 
7.	The City and Province default from the prior address. Check that these are valid. Update the Postal Code. In this scenario, enter "**M3J 1P3**".
8.	You may save or cancel the address change. Click the **Save** button.
9.	A **Save Confirmation** message will appear briefly at the top of the page; the list of addresses should now include the pending change of address. The address change will be reviewed and approved by HR.

Step	Action
10.	When you are done, you can return to the **Home** page. Click the **Home** button.
11.	**End of Procedure.**

3.3 Viewing Campus Mailing Address

Campus (i.e. Business) address information is available on the Address subpage of Personal Details in Employee Self Service.

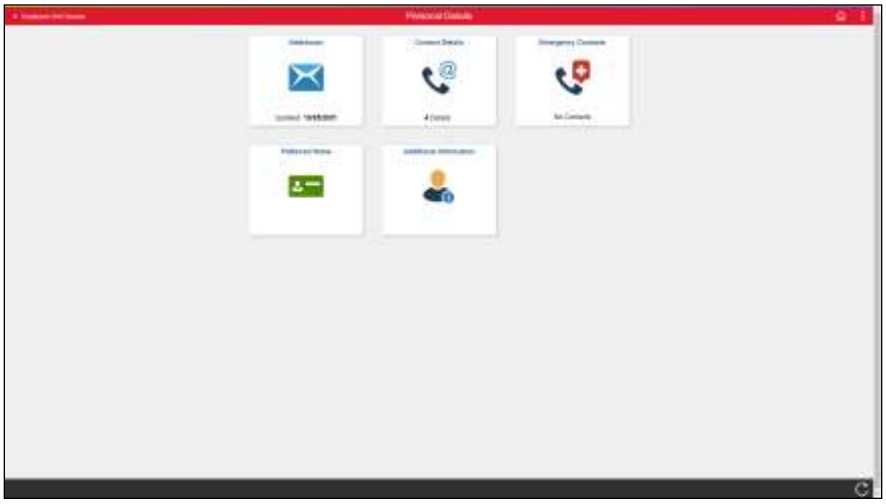
Note: York employees are not able to edit their campus mailing address using HR Self Serve. Contact hrhelp@yorku.ca to change to your campus mailing address.

Learning Objectives:

In this tutorial, you will learn how to view your campus **Mailing Address**.

Procedure

Step	Action
1.	Click the **Personal Details** tile.



Step	Action
2.	Campus Address information is available in the **Addresses** tile. Click the **Addresses** tile.
3.	The **Mailing Address** is your York campus address. **Note:** York employees are not able to edit their campus mailing address using HR Self Serve. Contact your hrhelp@yorku.ca to initiate a change to your campus mailing address.
4.	Once finished, you can sign out or return to the **Home** page. Click the **Home** object.
5.	**End of Procedure.**

3.4 Viewing and Changing Phone Numbers

Phone numbers and email addresses are available on the Contact Details subpage of Personal Details in Employee Self Service.

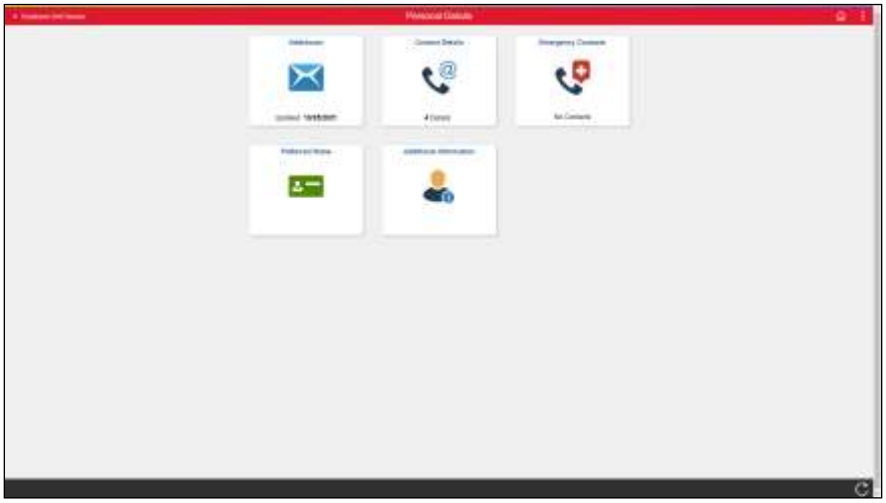
You can use this subpage to view your business and additional preferred phone numbers.

Learning Objectives:

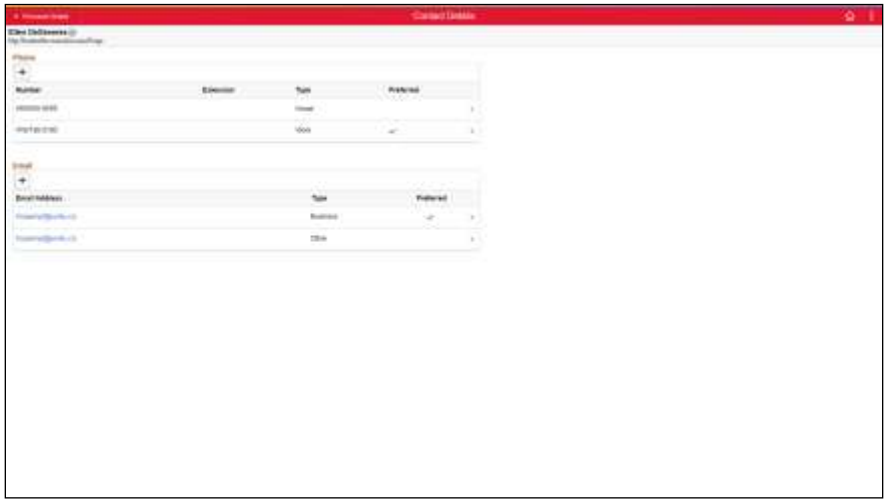
In this tutorial, you will learn how to add or delete contact phone numbers.

Procedure

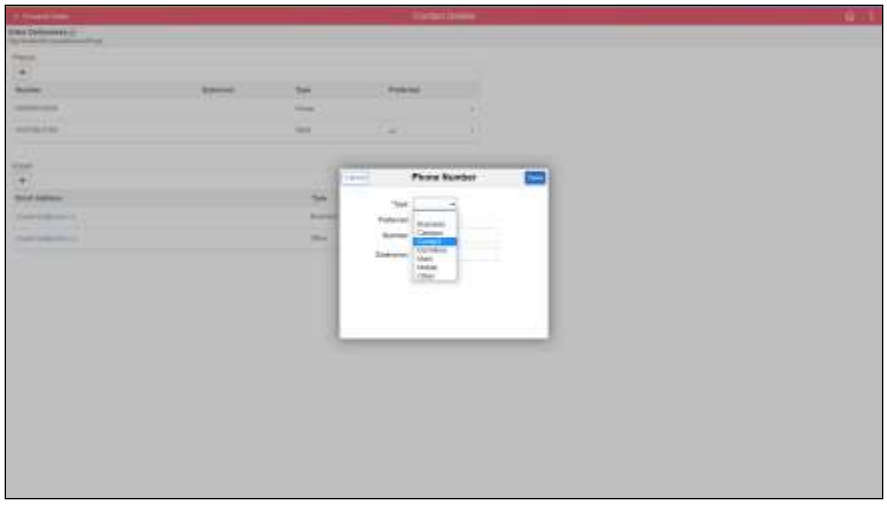
Step	Action
1.	Click the **Personal Details** tile.



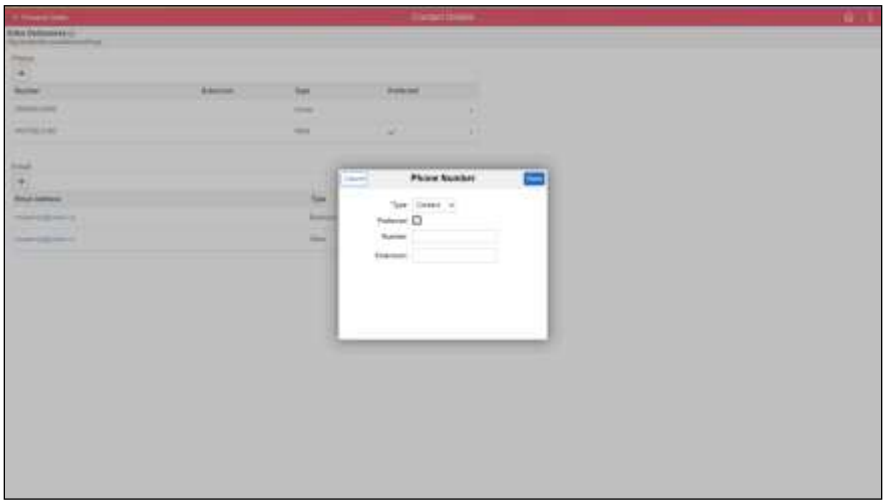
Step	Action
2.	Contact phone numbers are available from **Contact Details.** Click the **Contact Details** tile.
3.	**Business phone** should be your York phone number. You can add an alternative, **Contact phone** as the preferred number for business purposes. For example, this may be a mobile phone number. **Note: Contact phone** is not published (i.e. it does not appear in York Atlas).

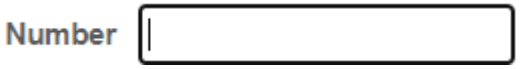
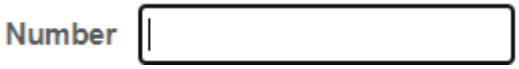


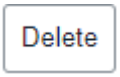
Step	Action
4.	You wish to add a cell phone number as a preferred business contact number. Click the **Add** button.
5.	Select a type of Phone. Click the **Type** list.



Step	Action
6.	Click the **Contact** list item.



Step	Action
7.	Click the **Preferred** option.
8.	Click in the **Number** field. 
9.	Enter the phone number nto the **Number** field. In this scenario, enterr "**416/487-6710**" or press **Enter**. 
10.	Click the **Save** button.
11.	A message appears indicating that the new phone number has been saved.
12.	The new phone number appears. It is identified as **Contact** and **Preferred**. To delete the phone number, click the **More Details** button.

Step	Action
13.	Click the **Delete** button. 
14.	Click the **Yes** button.
15.	The **Work** phone number has been deleted. Note that the **Contact** phone number is now preferred.
16.	**End of Procedure.**

3.5 Viewing Unit Email Address

Phone numbers and email addresses are available on the Contact Details subpage of Personal Details in Employee Self Service. You can use this subpage to view your York and unit email address.

York employees may have a main yorku.ca email address as well as a unit email address.

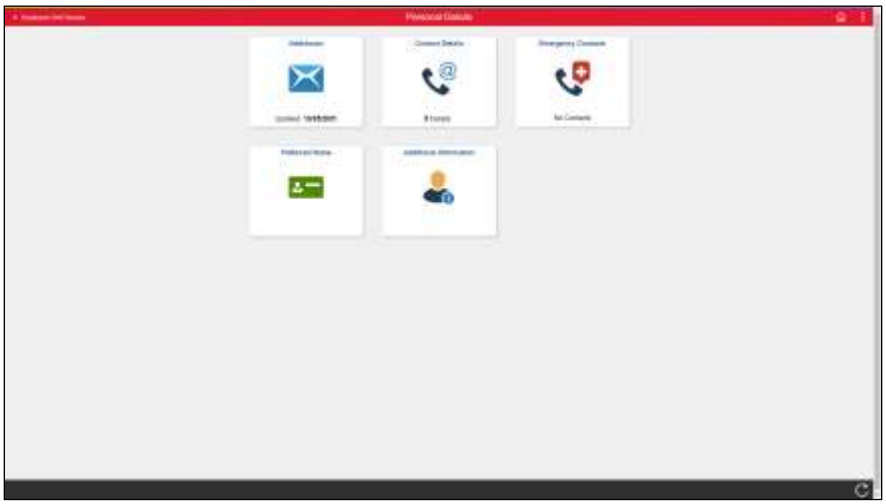
Note: York employees are not able to edit their unit email address using HR Self Serve. Contact hrhelp@yorku.ca to initiate a change.

Learning Objectives:

In this tutorial, you will learn how to view a unit email address.

Procedure

Step	Action
1.	The unit email address is available from the **Personal Details** tile within the **Contact Details** tile. Click the **Personal Details** tile.



Step	Action
2.	Click the **Contact Details** tile.
3.	In this scenario, Natalie Portman works for Osgoode. Her unit email appears and it is the preferred email.
4.	**End of Procedure.**

3.6 Maintaining a Personal Email Address

Personal email addresses are available on the Contact Details subpage of Personal Details in Employee Self Service.

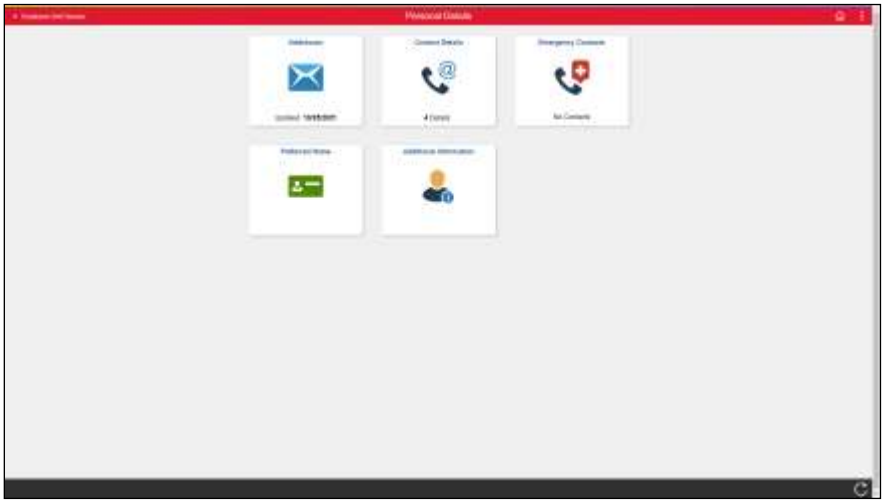
You can use this subpage to view and edit a personal email address.

Learning Objectives:

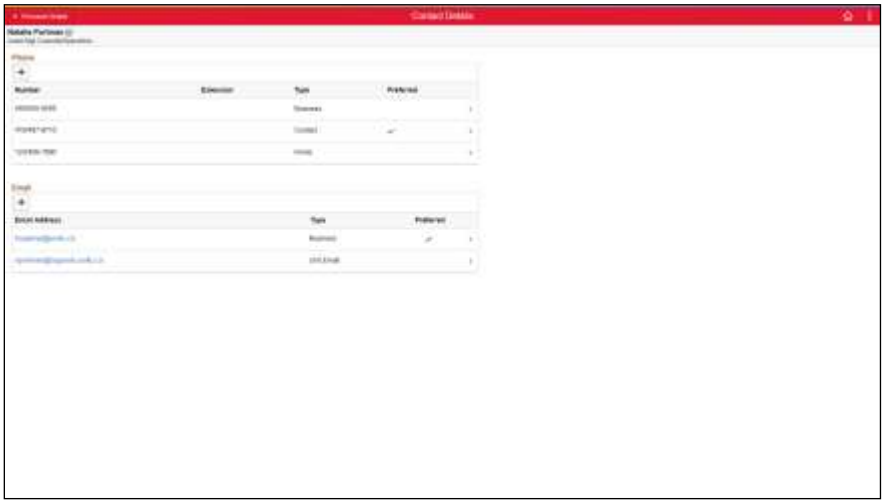
In this tutorial, you will learn how to add and delete a personal email address.

Procedure

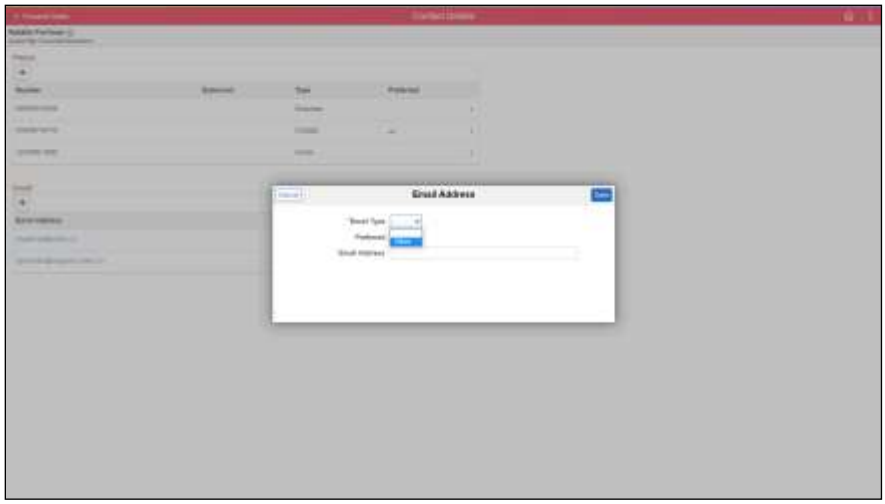
Step	Action
1.	Click the **Personal Details** tile.



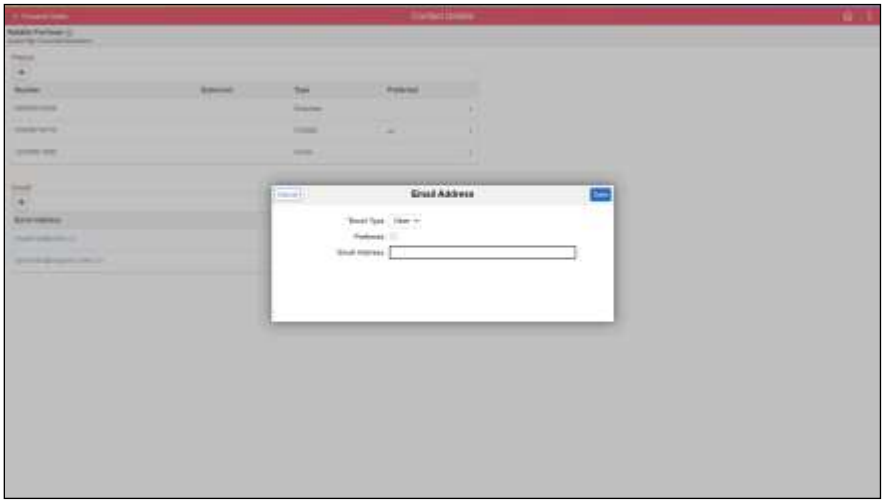
Step	Action
2.	Click the **Contact Details** tile.

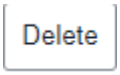


Step	Action
3.	Click the **Add** button.
4.	Click the **Email Type** list.



Step	Action
5.	Click the **Other** list item.



Step	Action
6.	Click in the **Email Address** field.
7.	Enter the desired information into the **Email Address** field. Enter "**nportmanpersonal@gmail.com**" or press <Enter>.
8.	Click the **Save** button.
9.	Natalie Portman's personal email has been added. To delete the email, return to the email details. Click the **More** button.
10.	Click the **Delete** button. 
11.	Click the **Yes** button.
12.	Natalie's personal email has been deleted.

Step	Action
13.	**End of Procedure.**

3.7 Maintaining Primary (Preferred) Name

Phone numbers and email addresses are available on the Contact Details subpage of Personal Details in Employee Self Service.

The **Primary Name** is used for non-official documents, communications and multiple York University systems (e.g. email address book). It is the name that you prefer to use. For example, the preferred/primary name can be your middle name.

Your **Legal Name** is used for Benefits and Payroll, including benefits enrollment, paycheques, direct deposits, and year-end tax forms (T4, T4A).

To update **Legal Name**, send a completed Name and/or Address Change form to Human Resources. The "Payroll Employee Name Change Application" form is available on YU Link, under the Compensation and Payroll Section. The path is:

Yulink > Employee Resources > Forms and Documents > Compensation and Payroll

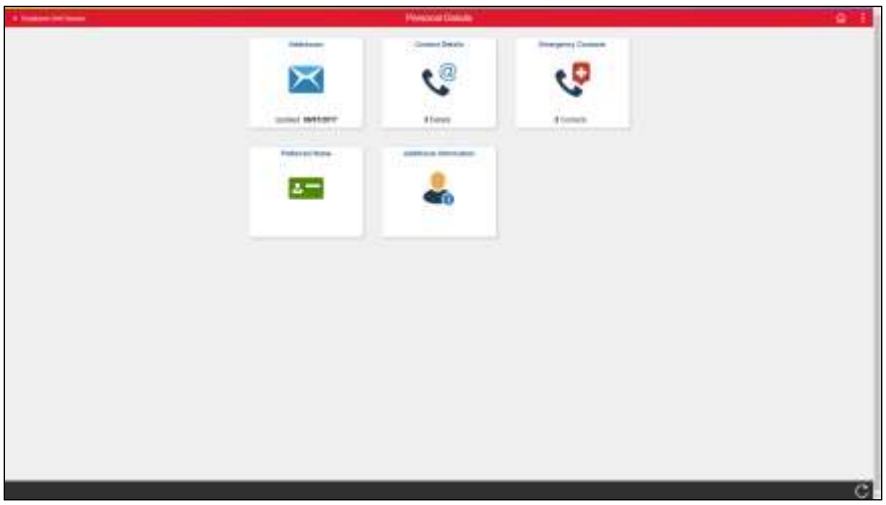
If you have a problem, please contact hrhelp@yorku.ca.

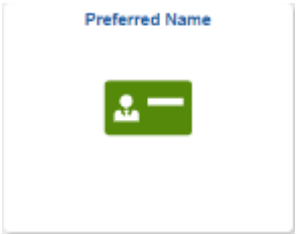
Learning Objectives:

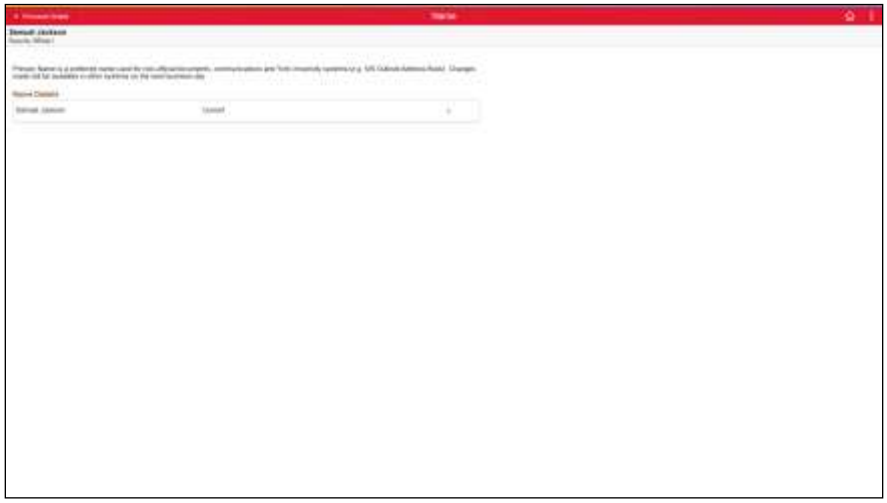
In this tutorial, you will learn how to view your primary (i.e. preferred) name. Changes made to your primary name will be available in other systems, such as email and the York Directory, on the next business day.

Procedure

Step	Action
1.	Changing your preferred name is available from the **Personal Details** tile. Click the **Personal Details** tile.



Step	Action
2.	Click the **Preferred Name Change** tile. 



Step	Action
3.	Click the **More** button. Samuel Jackson Current ›
4.	In this scenario, you are Samuel Jackson. You would prefer that the first name "Sam" appears in the York Directory and email system. Click in the **First Name** field. *First Name Samuel
5.	Enter the preferred first name into the **First Name** field. Enter "**Sam**". *First Name
6.	Click the **Save** button. Save
7.	A brief message appears at the top of the page indicating that the save was successful. Changes will appear after one business day in non-official documents, communications, and York University systems such as the York directory and email system.
8.	**End of Procedure.**

3.8 Maintaining Emergency Contacts

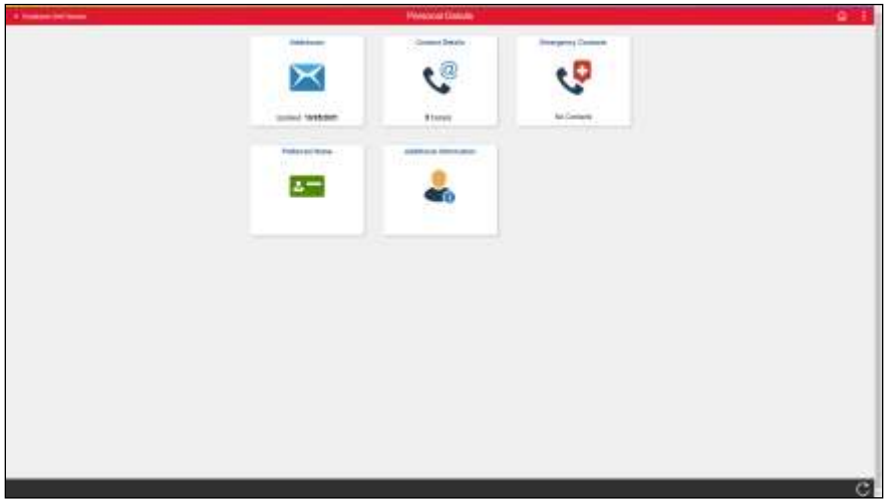
Emergency contacts are available on the Emergency Contacts subpage of Personal Details in Employee Self Service. You can use this subpage to update emergency contacts.

Learning Objectives:

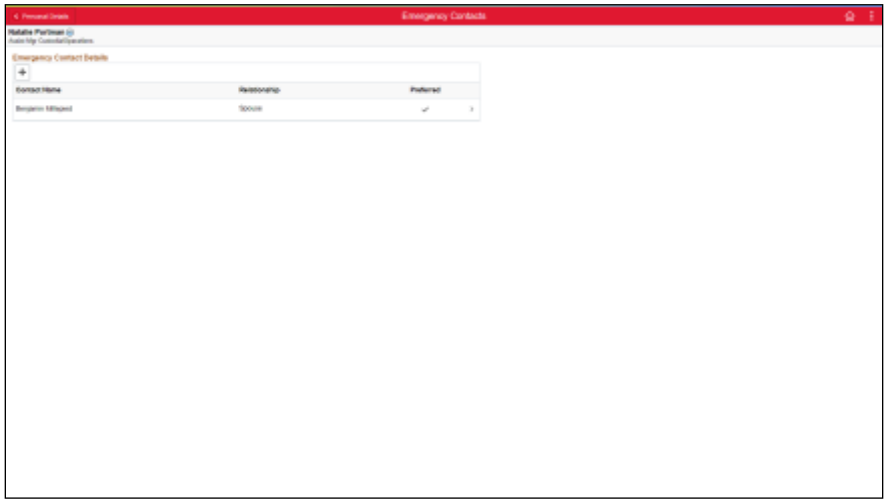
In this tutorial, you will learn how to add or change emergency contact information.

Procedure

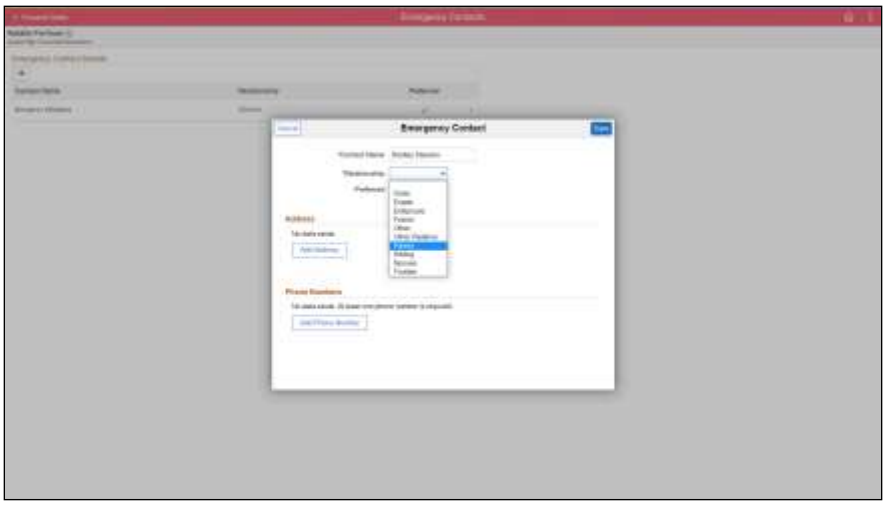
Step	Action
1.	Click the **Personal Details** tile.



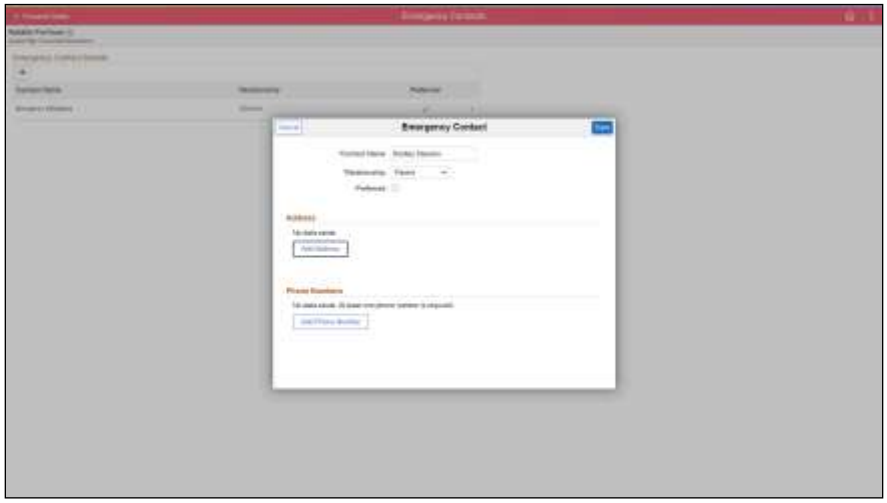
Step	Action
2.	Click the **Emergency Contacts** link.

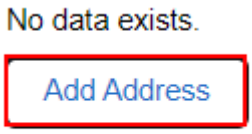
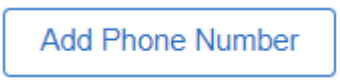


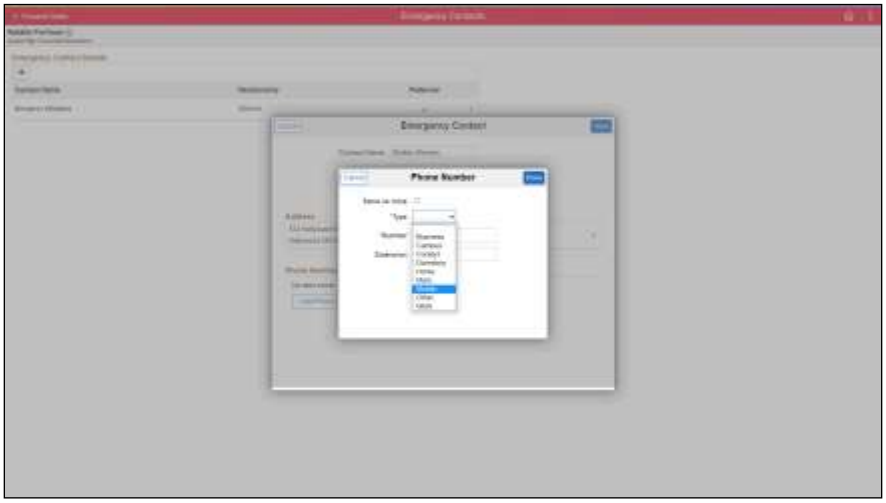
Step	Action
3.	Natalie currently has one emergency contact who is Benjamin Millepied; he is the preferred contact. You will be adding Shelley Stevens who is Natalie's mother. Click the **Add (+)** button.
4.	Enter "**Shelley Stevens**" into the **Contact Name** field or press **Enter.**
5.	Click the **Relationship** list.



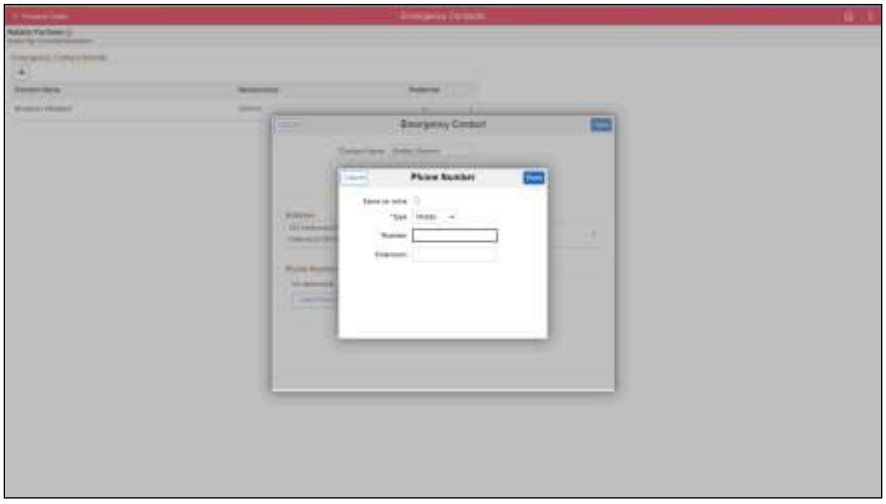
Step	Action
6.	Click the **Parent** list item.



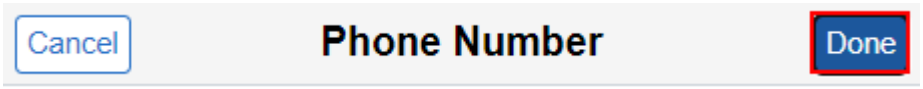
Step	Action
7.	Click the **Add Address** button. 
8.	Natalie's mother lives at the same address as Natalie. So, you can automatically copy your address. Click the **Same as mine** option.
9.	Click the **Done** button.
10.	Now you will add a mobile phone number for Shelley Stevens. Click the **Add Phone Number** button. 
11.	Click the **Type** list.



Step	Action
12.	Click the **Mobile** list item.



Step	Action
13.	Now add the phone number. Click in the **Number** field.

Step	Action
14.	Enter a 10-digit phone number into the **Number** field. In this scenario, enter "**416-736-2100**".
15.	Click the **Done** button. 
16.	Click the **Save** button.
17.	A message appears indicating that the save was successful. And, Shelley now appears in the Emergency Contacts list.
18.	**End of Procedure.**

3.9 Viewing a Pay Statement

Pay information is available on the *Pay* subpage of **Payroll and Compensation** tile in Employee Self Service. You can use this subpage to view a pay statement for a specific time period.

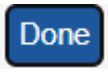
Learning Objectives:

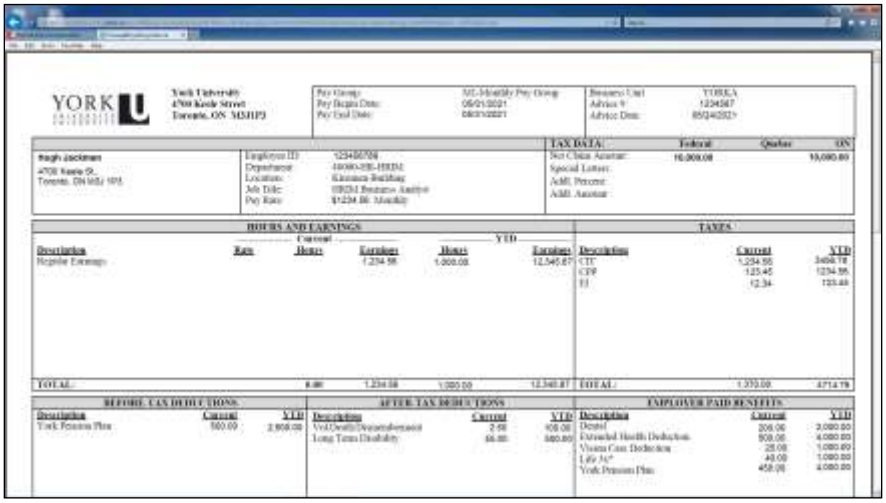
In this tutorial, you will learn how to locate and view a pay statement.

Procedure

Step	Action
13.	The last Pay Date, September 24, 2021 or 09/24/2021, appears on the tile. Click the **Payroll and Compensation** tile.

Step	Action
14.	Click the **Pay** tile.

Step	Action
15.	The list of pay statements appears. However, the pay statement for May 1, 2021 (i.e. 05/01/2021) is not on the list. You can find additional pay statements by filtering for the date. In this example, you will search for pay statements after May 1st (ie.05/01/2021). Click the **Filter** button.
16.	Enter the date information into the **From** field. For pay statements from May 1st, enter "**05/01/2021**".
17.	Click the **Done** object. 
18.	The list of pay statements after May 1st, 2021 appears. To view the details, click the **More** link. **Note:** The pay statement appears in a separate **pop-up** window. Some browsers are set to block **pop-ups**. If this occurs, you will need to allow HR Self Serve to open **pop-ups**. For instructions, see the tutorials "Getting Started - Internet Browsers - Allowing HR Self Serve Through a Pop-up Blocker" in the Optional Activity section of online course.



Step	Action
19.	The pay statement appears in .pdf format. Depending upon the .pdf viewer that you are using, the print option may be available. Once you are finished, click the **Close Tab** button.
20.	**End of Procedure.**

3.10 Viewing and Maintaining Direct Deposit Information

Direct Deposit information is available on the Direct Deposit tile of Payroll and Compensation in Employee Self Service.

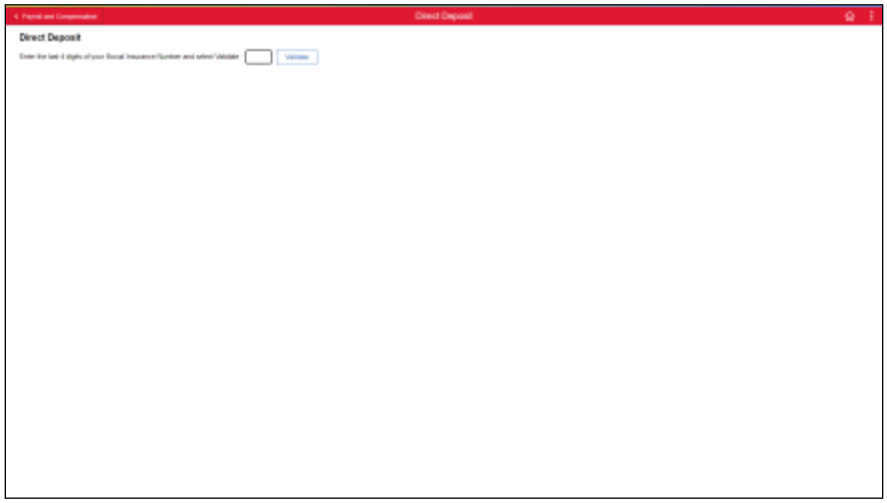
Note:
- Employees without a current Direct Deposit information can add an account after a Social Insurance Number validation.
- Employees not set up for direct deposit who currently receive payment by cheque can add a direct deposit account after a Social Insurance Number validation.
- Employees with **MULTIPLE** bank accounts in ESS must contact Human Resources - Payroll & Records by emailing **hrhelp@yorku.ca** to make any changes.
- Employees cannot revert to cheque through ESS once direct deposit information has been added.

Learning Objectives:

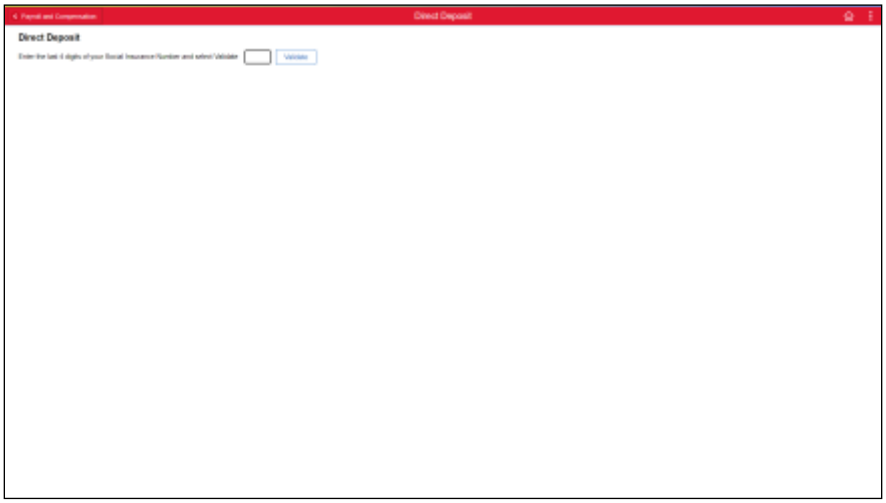
In this tutorial, you will learn to add and update your direct deposit information.

Procedure

Step	Action
1.	Click the **Payroll and Compensation** tile.
2.	Click the **Direct Deposit** tile.

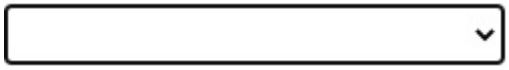


Step	Action
3.	To modify existing or add new direct deposit information, you will need to provide the last four digits of your Social Insurance Number for additional security validation. In this scenario, you do not have a Direct Deposit already established, you wish to add your banking information. Click in the **Social Insurance Digit** field.



Step	Action
4.	Enter the last 4 digits of your Social Insurance Number. In this scenario, Enter a valid value e.g. "**1111**".
5.	Click the **Validate** button.
6.	**Note:** An error message is displayed if an invalid Social Insurance Number is entered. The Social Insurance Number is validated and the "**Add Account**" buttion is now available.

Step	Action
7.	The “Add Account” appears in a pop-up window. **Note:** The **Bank ID**, **Branch ID** and **Account Number** can be obtained from your personal cheques or your Payroll pre-authorization bank form. - If a cheque has a designation number between the Institution number and account number; this information can be dropped. - The cheque or payroll pre-authorization deposit form must be from a Canadian Bank. - The cheque or payroll pre-authorization deposit form must include your name as the account holder. To view a cheque sample, click the **Info** icon.
8.	The Cheque sample appears in a pop-up window. Click the **Close** button to return to the previous screen.
9.	Click in the **Bank ID** field.
10.	Enter the 3 digits of the Bank ID. In this scenario, Enter a valid value e.g. "**001**".
11.	**Note:** An error message is displayed if the Branch ID is invalid. Click in the **Branch ID** field.
12.	Enter the desired information into the **Branch ID** field. Enter, a valid value, e.g. "**38512**".
13.	Click in the **Account Number** field.
14.	Enter the desired information into the **Account Number** field. Enter, a valid value e.g. "**9999999**".
15.	Click in the **Retype Account Number** field.

Step	Action
16.	Enter the desired information into the **Retype Account Number** field. Enter, a valid value e.g. "**9999999**".
17.	Click the **Account Type** list. 
18.	Click the **Chequing** list item.
19.	Click the **Save** button.
20.	A save confirmation message will appear briefly at the top of the page and the direct deposit information is now listed. You will now receive an Email confirmation to your Primary email address (@yorku.ca).
21.	**Note:** The following error message is displayed if the system cannot validate any of the Banking information entered. Repeat Steps 12 through 15 to ensure the data was entered correctly. If message persists, then email hrhelp@yorku.ca for further assistance. You now wish to **edit account number**. Click the **Right (>)** arrow.
22.	To **Edit Account Number,** click the **Pencil** icon.
23.	Enter the desired information into the **Account Number** field. Enter "**9871234**".
24.	Enter the desired information into the **Retype Account Number** field. Enter "**9871234**".
25.	**Note:** If you decide to cancel the Edit Account number changes, you may click the cancel button. In this case, the system will not save your changes and no email confirmation will be generated. Click the **Cancel** button.

Step	Action
26.	You have completed this tutorial. **End of Procedure.**

3.11 Consenting to Receive T4 or T4A Information Slips Electronically

York University has made T4/T4A information slips available online through Employee Self Service.

Under Canada Revenue Agency (CRA) regulations, in order to receive information slips electronically, individuals must give their consent to this method of receipt.

Additionally, consent must be provided prior to the date that T4/T4As are produced (approximately the end of the first week in February). Otherwise, a paper copy will be issued by February 28th, in accordance with the annual deadlines set by the CRA. Once the annual election period has passed, consent election will not be available until the following year.

Learning Objectives:

In this tutorial, you will learn to:
- view the status of a T4/T4A consent and
- submit a consent to receive information slips electronically.

Procedure

Step	Action
1.	The consent to receive T4s electronically is available within **Payroll and Compensation.** Click the **Payroll and Compensation** tile

Step	Action
2.	**Note:** "No consent received" message is displayed on the tile. This means you have not provided consent to receive T4s electronically. To provide consent, click the **T4/T4A Constent** tile.

Step	Action
3.	Click the **Consent** checkbox.
4.	Click the **Submit** button.
5.	A confirmation appears that the consent was submitted. **Note:** You will receive an email to your York U email address confirming your selection.

Step	Action
6.	To verify the status of the consent, click the **Payroll and Compensation** link.
7.	The consent status has changed to "Consent received". **Note:** As soon as the T4/T4A information has been prepared by the Payroll Department, you will receive an email notification advising you that it is available online.
8.	**End of Procedure.**

3.12 Viewing T4 or T4A Information Slips

York University has made T4/T4A information slips available online through Employee Self Service. Under Canada Revenue Agency (CRA) regulations, in order to receive information slips electronically, individuals must give their consent to this method of receipt.

Please see Tutorial 3.11 on how to provide consent.

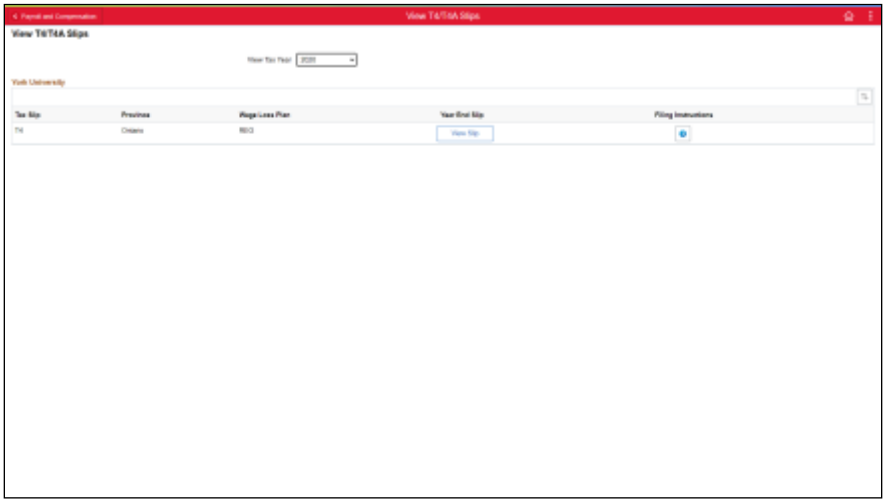
Learning Objectives:

In this tutorial, you will learn to locate and view T4/T4As online.

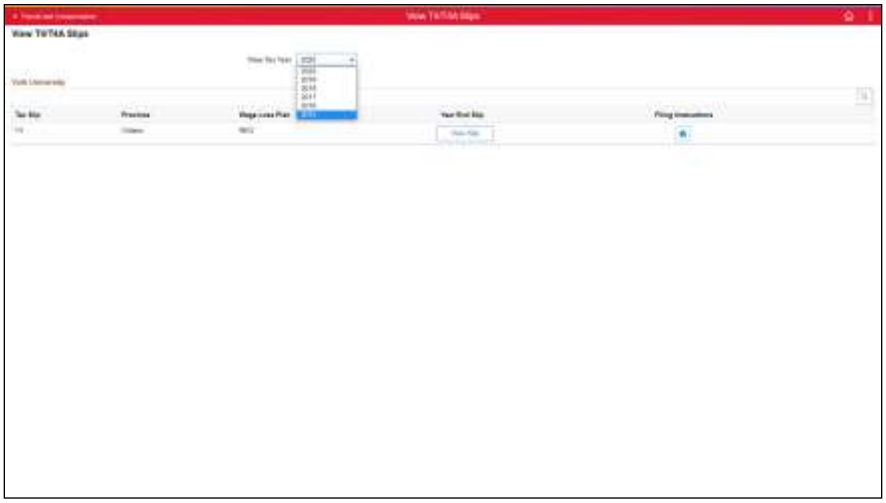
Procedure

Step	Action
1.	To view the **T4/T4A Slips,** click the **Payroll and Compensation** tile.

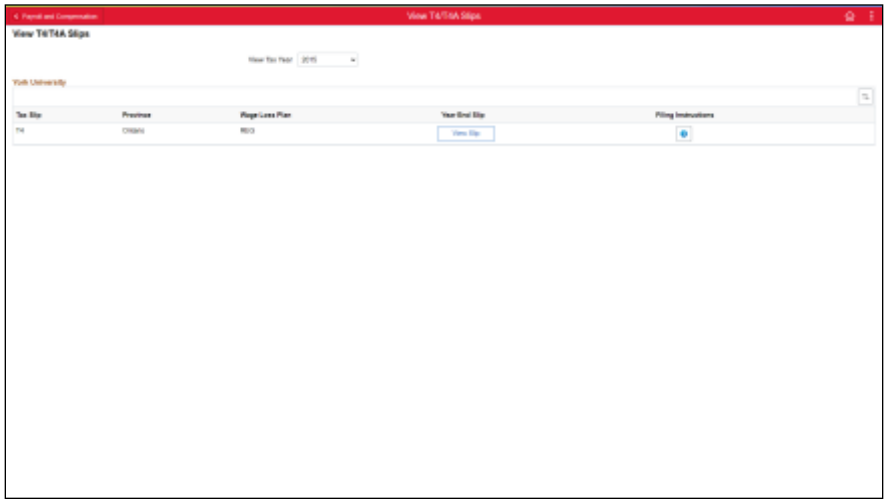
Step	Action
2.	Click the **View T4/T4A Slips** tile.



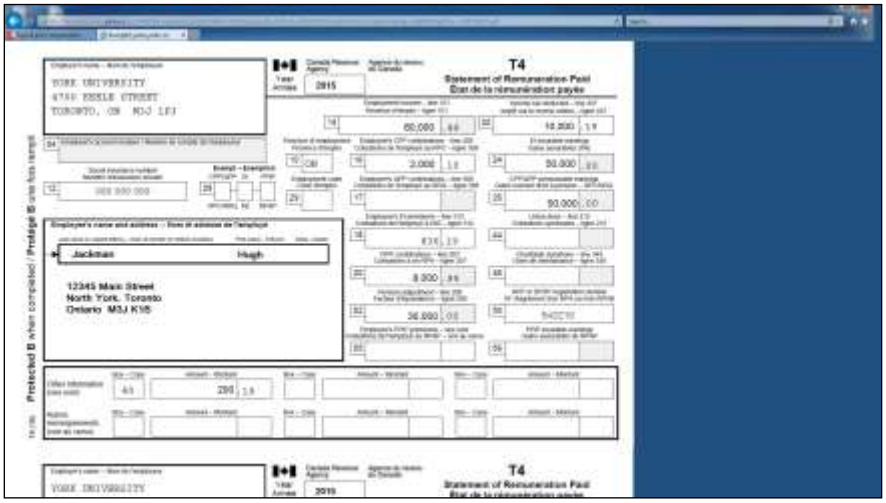
Step	Action
3.	The most recent (2020) T4 is available on this page. To view the 2015 T4, you will need to select a different year. Click the **Tax Year** list. View Tax Year 2020
4.	Consent to receive T4 /T4A slips electronically must be completed prior to the forms being produced (approximately the end of the first week in February). Otherwise a paper copy will be issued by February 28th, in accordance with the annual deadlines set by the CRA. Once the annual election period has passed, consent election will not be available until the following year.



Step	Action
5.	To view the appropriate T4, click the **2015** tax year. 2015



Step	Action
6.	View the T4 for 2015. Click the **View Slip** button. View Slip
7.	The T4 or T4A slip is presented in a pop-up window. If the T4/T4A is not displayed, and the message below appears, you can permit pop-ups using **Options for this Site**. There are additional instructions on how to set permissions for pop-up blockers for different browsers. These instructions can be found in the tutorials "Getting Started - Internet Browsers -Allowing HR Self Serve through a Pop-up Blocker" in the Additional Employee Self Service Topics activity.



Step	Action
8.	The T4 appears in a pop-up window. Click the **Close** button.
9.	**End of Procedure.**

3.13 Access and Generate the T2200S Form

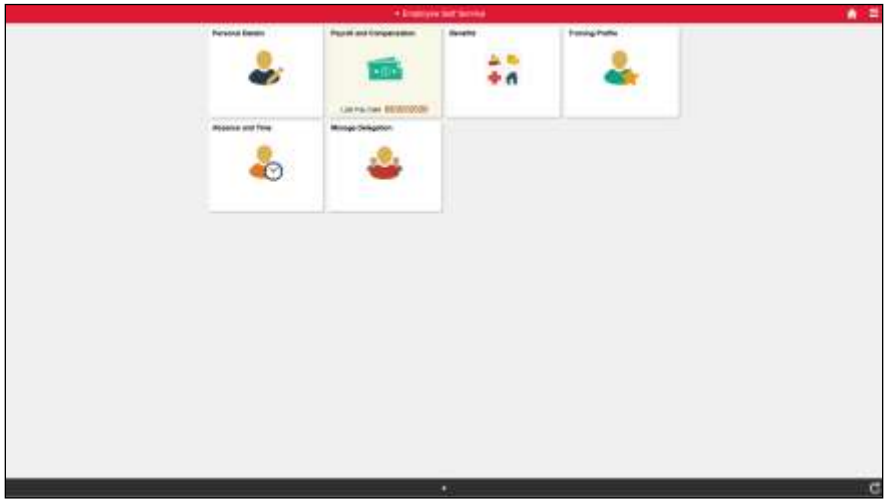
Eligible employees can access the **T2200S Form** from the Employee Self Service homepage, in the Payroll and Compensation collection.

Employees belonging to the following groups are excluded from accessing the T2200S forms from ESS:
- CUPE 1356 – 2 Part-Time (CU2)
- CUPE 1356 Part-Time (CPT)
- CUPE 1356 Full-Time (CUP)
- CUPE 1356 – 1 (CP2)
- Casual-Guest lecturer, honorariums (CLH)
- Daycare (DAY)
- Host Teachers (CHT)
- Inter Union of Operating Engineers (IUO)

Learning Objectives:

In this tutorial, you will learn how to locate and generate the **T2200S Form**..

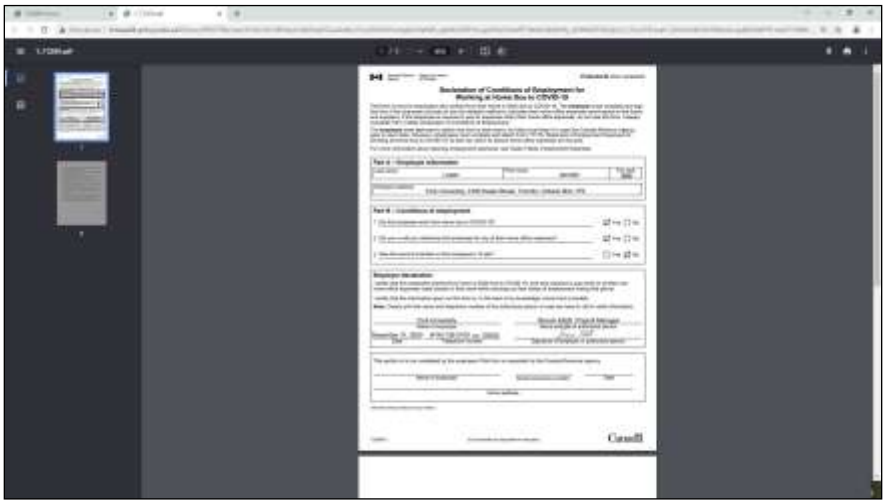
Procedure



Step	Action
1.	Click the **Payroll and Compensation** tile.

Step	Action
2.	Click the **T2200S Forms** tile.
3.	**Note:** Employees not eligible for **T2200S Forms**, or do not have an active Job-status for the period of the available **T2200S Forms**, will receive the **not eligible message** when trying to access the **T2200S Forms** page.
4.	Employees eligible for **T2200S forms** will receive the acknowledgement screen

Step	Action
5.	To access the form, check the acknowledgement box. Click the **checkbox** option. ☐
6.	Click the **T2200S Form** link. T2200S Form



Step	Action
7.	The T2200S form appears as a PDF file that you may download or print. Click the **Close (X)** button. ×

Step	Action
8.	Click the **Home** button.
9.	**End of Procedure.**

Time Reporting Tool (TRT) for Employees

1. Reporting Time

1.1 Overview of the Time Reporting Process

York University uses:
Employee Self Service (ESS) to provide access to an individual's own HR information, and
Manager Self Service (MSS) to provide access to the HR functions for a manager.

The **Time Reporting Tool** is available through ESS and MSS.
ESS is used to Request Time. MSS is used to Review and Approve Time.

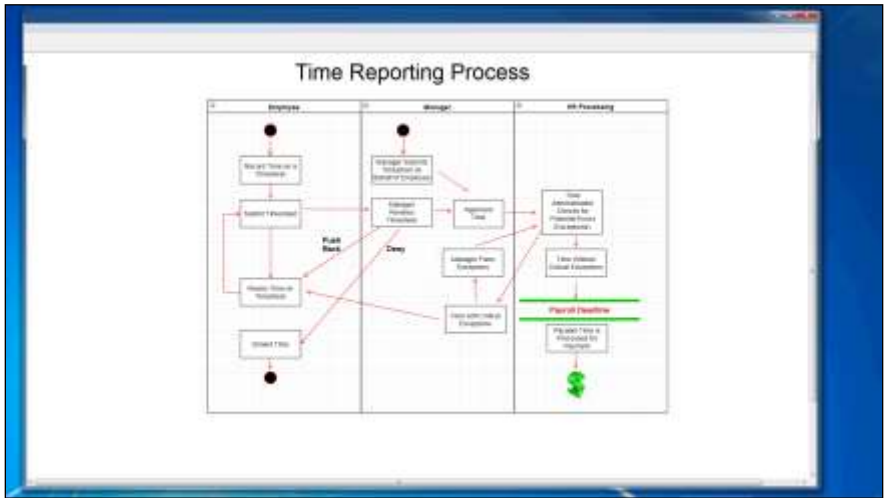
Learning Objectives:

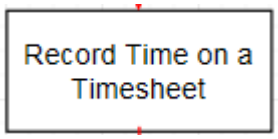
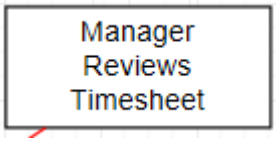
In this tutorial, you will become familiar with:

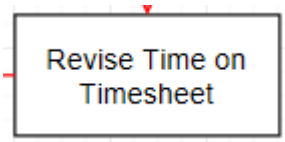
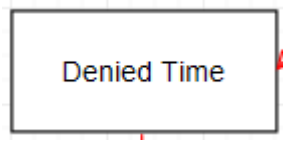
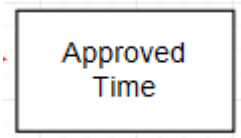
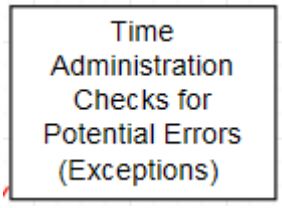
- the overall process for **Time Reporting,** and

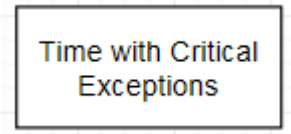
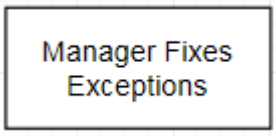
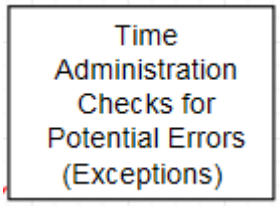
- key terms used in **Time Reporting** including:
  - Requested Time,
  - Approved Time,
  - Exceptions, and
  - Payable Time.

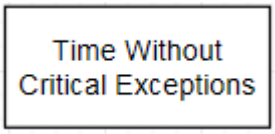
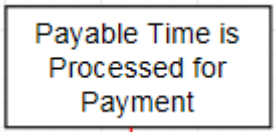
Procedure



Step	Action
1.	An employee can create a **Timesheet** to **Request Time**. The **Timesheet** may be for a single day or entire week. Alternatively, a **Time Reporter** can create the **Timesheet** on behalf of an employee. The types of time reported depends on the employee's collective or employment agreement. For example, some collective agreements include reporting **Overtime.** Note: **Absences** such as **Vacation** and **Sick Days** are reported through **Absence Reporting** not **Time Reporting.** **Press Enter to Continue.** 
1.	Once completed, the **r**equested time is **Submitted** to the **Manager** for review. **Press Enter to Continue.**
2.	Once the **Time** is **Submitted,** it is available for the **Manager** to review. The **Manager** has three options: 1. **Approve** the time request. 2. **Push Back** the request and ask for changes, or 3. **Deny** the time request. **Press Enter to Continue.** 

Step	Action
3.	A time request that is **Pushed Back** can be revised and resubmitted. **Note:** Changes to **t**ime requests are subject to the **28 Day rule**; Only time that is *28* days or less can be revised. **Press Enter to Continue.** 
4.	A manager may **Deny** a time request. **Press Enter to Continue.** 
5.	The manager may review a time request and **Approve** it. **Press Enter to Continue.** 
6.	Once time is **Approved,** it is checked for errors. Errors are called **Exceptions** and may include calculation errors (e.g. an employee mistakenly reports more than 24 hours in a day) or requests time inconsistent with collective agreements. The process to check for errors runs nightly. Only time requests that are without critical errors will move to processing. **Press Enter to Continue.** 

Step	Action
7.	The manager reviews **Exceptions** as they occur. Time with critical **Exceptions** cannot be paid; the exceptions must be resolved. **Press Enter to Continue.** 
8.	The manager makes corrections to resolve **Exceptions**. This may include: - **Allowing** the Exception - **Changing** the Time Request. Employees are also able to review **Exceptions**, revise a time request and resubmit. Any changes are subject to the 60-day rule. **Press Enter to Continue.** 
9.	Time requests that had exceptions and were revised are then reviewed again for potential errors. **Press Enter to Continue.** 

Step	Action
10.	Requested time that is both: - Approved and, - Without critical exceptions waits for processing. **Payroll Deadline:** Approved Time available for processing prior to the **Payroll Deadline** will be processed for payment. Otherwise, it will be processed after the next **Payroll Deadline**. The Timesheet reporting approval deadline is outlined in the payroll schedule that is located on the Employee Resources tab of YU Link under the path: **Employee Resources > Compensation and Payroll > How and When you Get Paid > Payroll Schedule** **Press Enter to Continue.** 
11.	Any time that is approved prior to the **Payroll Deadline**, and without Critical Exceptions is processed. Where applicable, **Payable Time** is processed for payment. In some cases, corrections to timesheets may result in an adjustment on the pay. **Press Enter to Continue.** 
12.	You have completed this tutorial. **End of Procedure.**

1.2 Reporting Daily Time on Phone or Mobile Device

As a salaried employee, you are considered an Exception Time Reporter. This means you do not report regular hours worked in order to be paid. However, you need to report Exceptions to your regular hours. Please refer to your employment or collective agreement for specific details on entitlements.

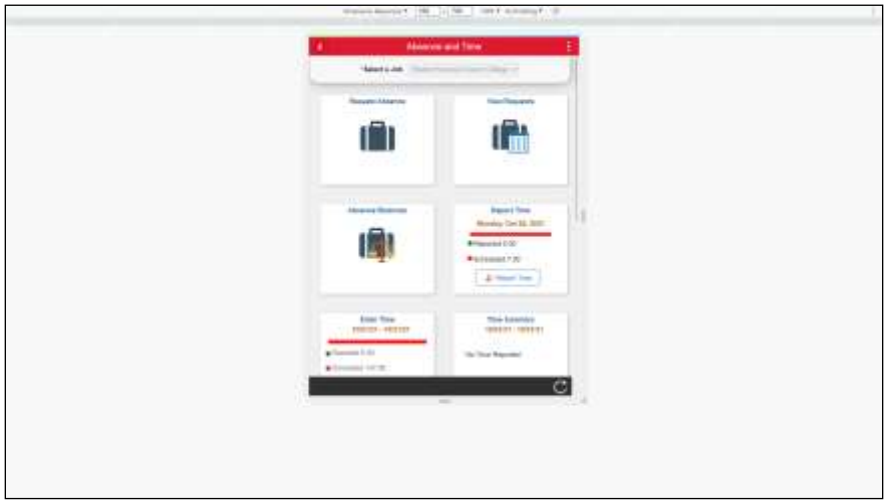
There are two ways to report time. It is recommended that you use:
- **Report Time** on a **smartphone** or other mobile device and
- **Enter Time** on a **desktop or laptop**.

Learning Objectives:

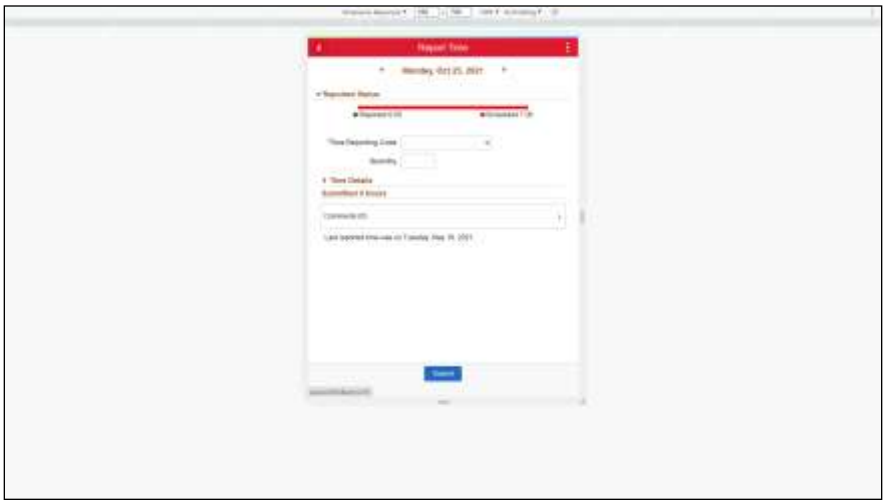
In this tutorial, you will learn how to **Report Time** on a **smartphone.**

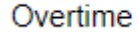
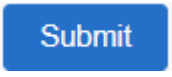
Procedure

Step	Action
1.	Click the **Absence and Time** tile.



Step	Action
2.	Click the **Report Time** button.



Step	Action
3.	Click the **Time Reporting Code** list.
4.	Click the **Overtime** list item. 
5.	Click in the **Quantity** field.
6.	Enter **1** hour in the **Quantity.**
7.	Click the **Submit** button. 
8.	A message appears on the top of the screen indicating that the Time Report was Submitted Successfully.
9.	You have completed this tutorial. **End of Procedure.**

1.3 Reporting Time on Enter Time

As a salaried employee, you are considered an Exception Time Reporter.
This means you do not report regular hours worked in order to be paid. However, you need to report exceptions to your regular hours.

Use the Enter Time page to record:
- any non-regular hours such as overtime, on call, shift premium, etc.
- certain work events such as training and conferences, union duty leave, and time off in lieu.

Please refer to your employment or collective agreement for specific details on entitlements.

Note: Absences, such as vacation and sick days, should be requested and approved through the Absence Request pages.
Absences will appear on the timesheet for information purposes only.

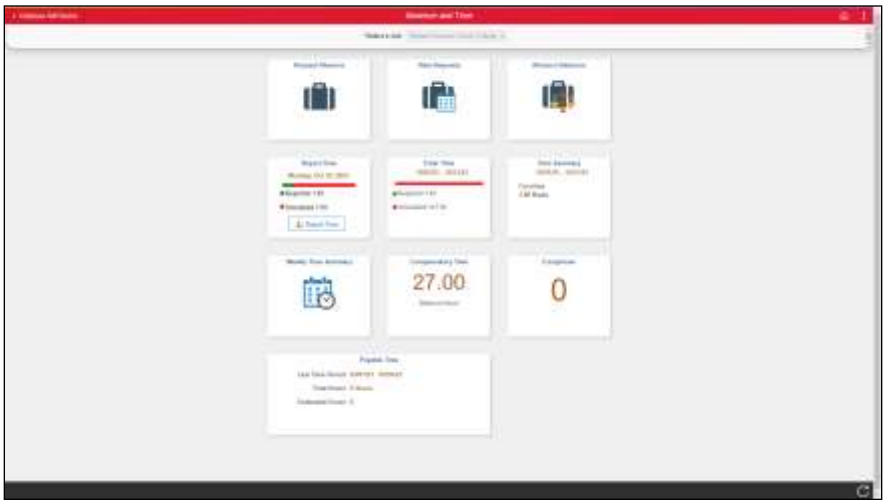
Important! If you are an employee on Work Accommodation, please refer to the tutorial on "Reporting Time as an Hourly Employee - Work Accommodation ".

Learning Objectives:

In this tutorial, you will learn how to report time, including:
- report regular overtime on several days,
- report special overtime,
- report time for training, and
- add permanent comments to time reporting.

Procedure

Step	Action
1.	Click the **Absence and Time** tile.

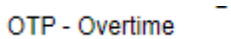


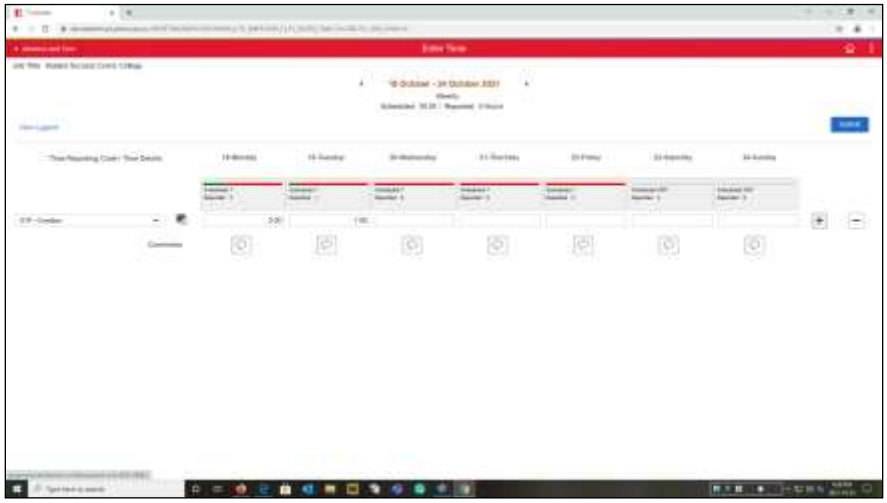
Step	Action
2.	Click the **Enter Time** tile.
3.	The enter time page for the current week appears by defaults. To report over a different time period, adjust the **Date.** You can adjust the date by clicking on the **Left** or **Right** arrows. You may also navigate to a different period by clicking on the calendar and selecting a new date. You may need to do this, for example, if you made a mistake or forgot to report time. To make the adjustment, re-enter the correct hours on the enter time page for that particular day and re-submit for approval.

Step	Action
4.	**Note:** Changes can be made up to 28 calendar days prior to the current date. If the adjustment is to a period of more than 28 days prior to the current date, you will need to ask your manager to process the adjustment.

Step	Action
5.	A single row can be used to report any time during the week for a specific **Time Reporting Codes or TRCs**. **Important!** Approval to work overtime must be obtained in advance, as per current business practice. The timesheet is not a tool to request overtime, but rather a way to record all approved overtime that was actually worked. Click in the **Monday** field.
6.	Note: When reporting time, use .25 increments only. Any rounding should be in the employee's favour. Valid values are: .25 (15 minutes) .5 (30 minutes) .75 (45 minutes) 1 (60 minutes/1 hour) Enter **2** hours into the **Monday** field.

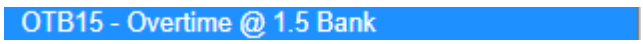
Step	Action
7.	Click in the **Tuesday** field.
8.	Enter **1** hour into the **Tuesday** field.
9.	Select the appropriate *Time Reporting Code*. **Note:** You will only see the TRCs applicable to your affiliation. Refer to the Time Reporting Codes (TRCs) for Timesheet Submission by Affiliation (https://yulink-new.yorku.ca/documents/20182/89397/Time+Reporting+Codes+%28TRCs%29+for+Timesheet+Submission+by+Affiliation+%28XLS%29/3326d1a9-de2a-4644-a838-a7b1c8c4877d) to determine TRC meanings and when to use them. Click the **Time Reporting Code** list.

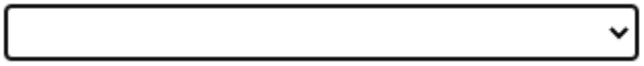
Step	Action
10.	Click the **OTP - Overtime** list item. 



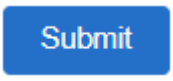
Step	Action
11.	You will also report an additional 2 hours of overtime on Tuesday at 1.5 rate. Because the banked overtime uses a different Time Reporting Code, it needs to be on a different row. Click the **Plus Sign** button to add a new row.

Step	Action
12.	A new row appears. Click in the **Tuesday** field.
13.	Enter **2** hours into the **Tuesday** field.
14.	Select the appropriate Time Reporting Code. Click the **Time Reporting Code** list.

Step	Action
15.	Click the **OTB15 - Overtime @ 1.5 Bank** list item. 

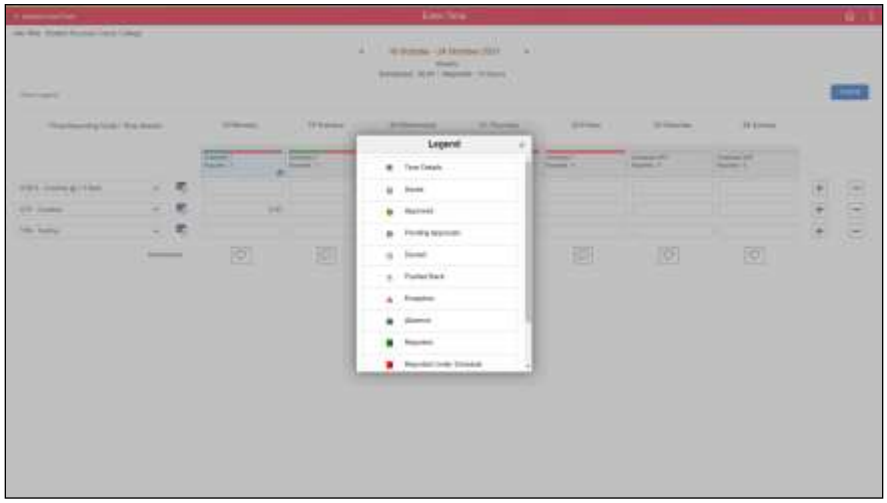
Step	Action
16.	You need to Click the **Plus Sign (+)** button.
17.	The new row appears. **Note:** Training and Conferences should be pre-approved by your manager. Several time Reporting Codes, such as Training and Conferences are entered only for records purposes; there is no impact on your pay. Click in the **Wednesday** field.
18.	Enter 7 hours into the **Wednesday** field.
19.	Select the appropriate Time Reporting Code. Click the **Time Reporting Code** list. 

Step	Action
20.	Click the **TRN - Training** list item.

Step	Action
21.	Once you have entered all time worked, you can submit it for approval. Click the **Submit** button. 
22.	A message appears indicating that the time has gone to your manager, or their designee, for approval.

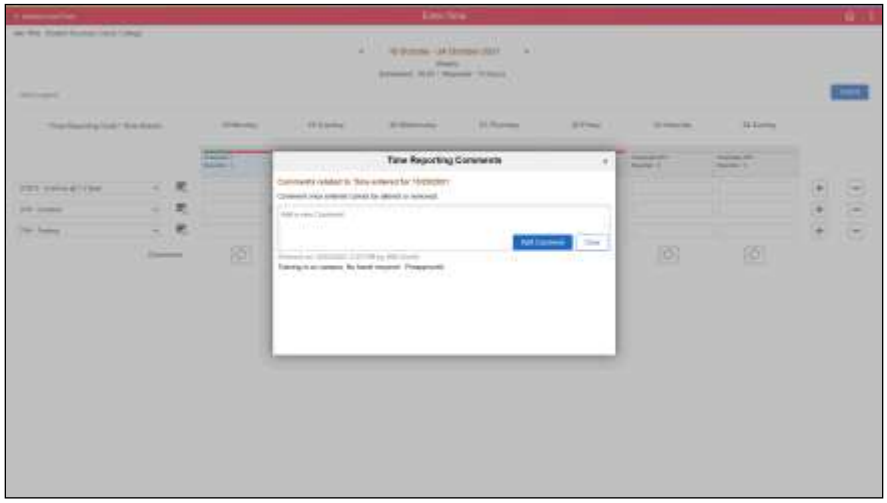
Step	Action
23.	All time entered will show the **Needs Approval** icon. All reported time needs managerial approval.

Step	Action
24.	To review what the reported time status icons represent, click the **View Legend** link. View Legend



Step	Action
25.	All status icons are displayed in the Legend window. Click the **X sign** button to return to the previous page. ✕

Step	Action
26.	You will now add comments for Wednesday's 7 hours of training. Click the **Add Comment** button.
27.	Enter any notes into the **Comment** field. An example might be "**Training is on campus. No travel required. Preapproved.**" Or press **<Enter>.**
28.	Click the **Add Comment** button.



Step	Action
29.	The comments have been added. Click the **X** button to return to the previous page.
30.	**Note:** The **Add Comment** icon has now changed to a filled-in bubble; this indicates that there is a comment for that day.
31.	You have completed this tutorial. **End of Procedure.**

1.4 Viewing Compensatory Time (Time Off in Lieu)

Based on your employment or collective agreement, you may be able to earn overtime and bank it for use later. Reporting **both** the earning and use of overtime is done using the **Enter Time page**.

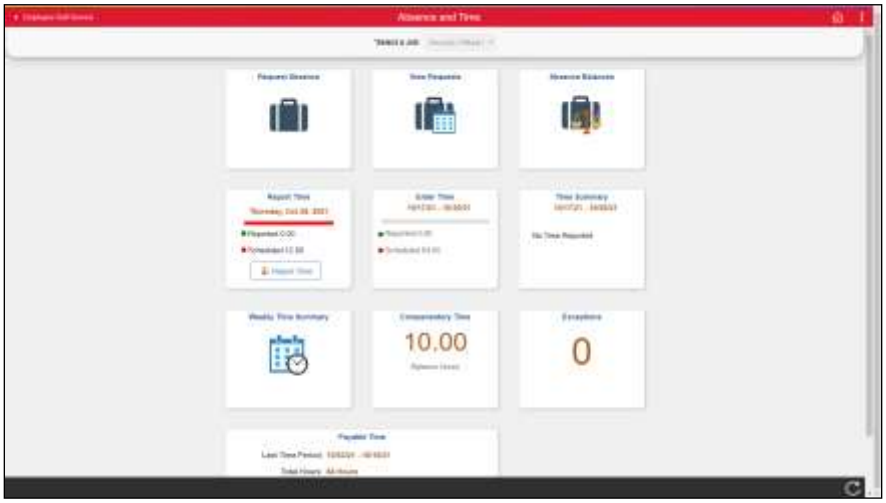
You can view your total banked overtime hours on the **Compensatory Balances** tile.

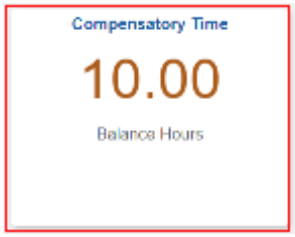
Learning Objectives:

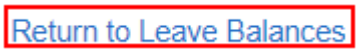
In this tutorial, you will learn how to check the compensatory time banks.

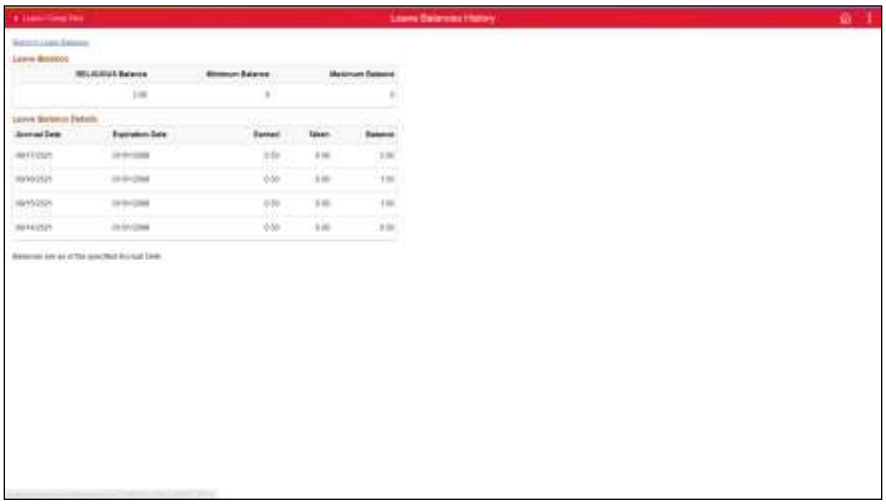
Procedure

Step	Action
1.	Click the **Absence and Time** tile.



Step	Action
2.	Click the **Compensatory Time** tile. 
3.	The *Leave / Comp Time* page appears and displays one or more of the following tiles: **Banked OT (Overtime), Religious, Stat (Statutory) Bank**. Within each tile the following information is shown: **Plan Type:** Compensatory (Comp) Time **Recorded Balance:** The current comp time balance in hours **As of Date:** The last date a comp time was reported or taken E**xpiration Period:** Comp Time does not expires
4.	In this scenario, you have all three tiles displayed and you would like to review the details of each. Click the **BANKED OT** tile.

Step	Action
5.	This page displays **Banked Overtime**. In this scenario, you have no Banked Overtime hours. Click the **Return to Leave Balances** link. 
6.	Click the **RELIGIOUS** tile.



Step	Action
7.	This page displays **Religious Time Bank**. In this scenario, you have 2.00 hours of religious time banked. Click the **Return to Leave Balances** object.
8.	Click the **STAT BANK** tile.

Step	Action
9.	This page displays **Statutory Holiday Time Bank**. In this scenario, you have 8 hours of statutory time banked. Click the **Return to Leave Balances** link. Return to Leave Balances
10.	You have completed this tutorial. **End of Procedure.**

1.5 Banking and Requesting Compensatory Time (Time Off In Lieu)

Based on your employment or collective agreement, you may be able to earn overtime and bank it for use later.

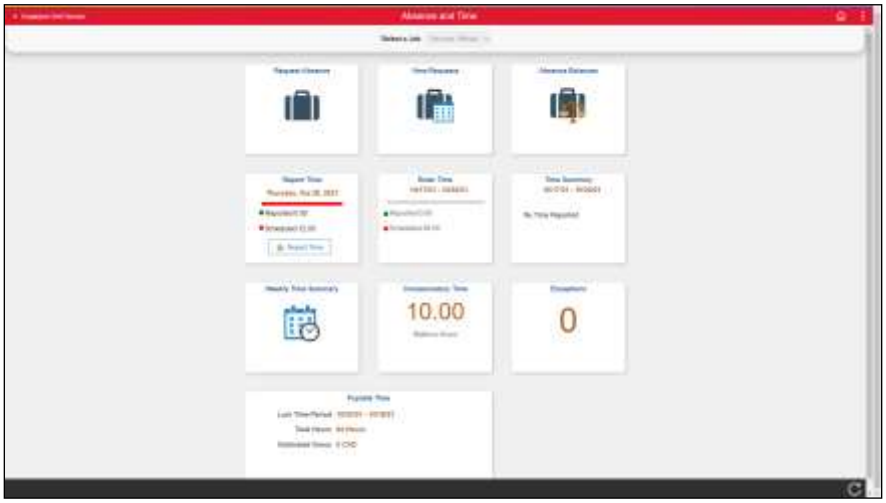
Reporting **both** the earning and use of overtime is done using the Timesheet.

Learning Objectives:

In this tutorial, you will learn how to:
- report and bank overtime on a timesheet, and, after the timesheet is approved,
- request to use the time banked (i.e. lieu time).

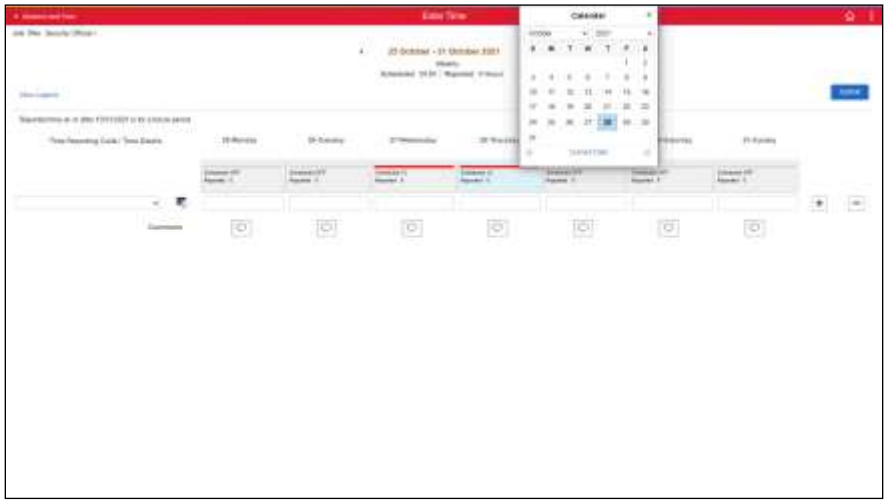
Procedure

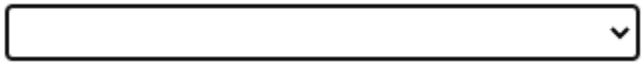
Step	Action
1.	Click the **Absence and Time** tile.



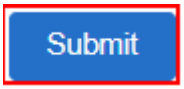
Step	Action
2.	Click the **Enter Time** tile.

Step	Action
3.	The enter time page for the current week appears by defaults. To report over a different time period, adjust the **Date**. You can adjust the date by clicking on the **Left** or **Right** arrows. You may also navigate to a different period by clicking on the calendar and selecting a new date. In this scenario, you wish to bank time in the week of October 19th. Click the **Calendar** object. ◄ 25 October - 31 October 2021 ►

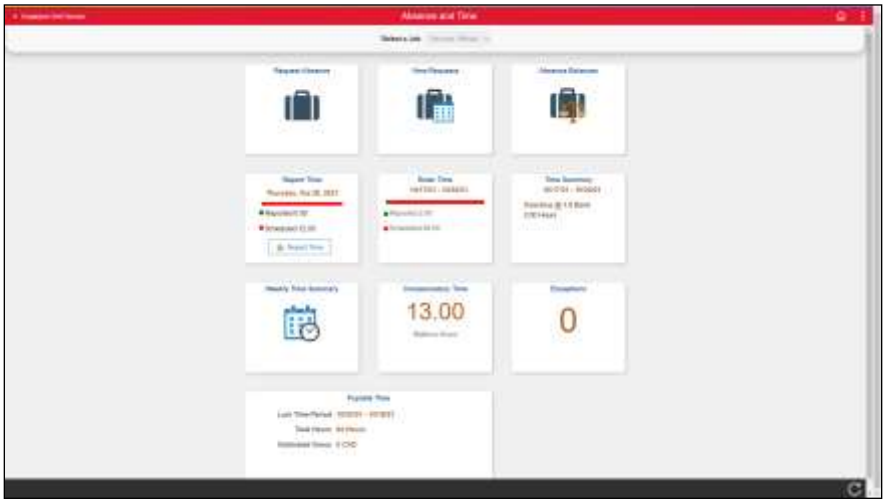


Step	Action
4.	The Calendar window appears. Click the date link.
5.	You wish to report 2 hours of banked overtime. Be sure to use the correct rate. In this scenario, the overtime is at the rate of 1.5. Click in the **Tuesday** field.
6.	Enter **2** hours.
7.	Click the **Time Reporting Code** list. 

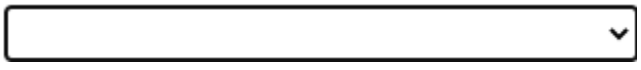
Step	Action
8.	For this example, select **Overtime @ 1.5** that is banked. Only approved overtime that is banked can be used later for lieu time use. Click the **OTB15 - Overtime @ 1.5 Bank** list item.

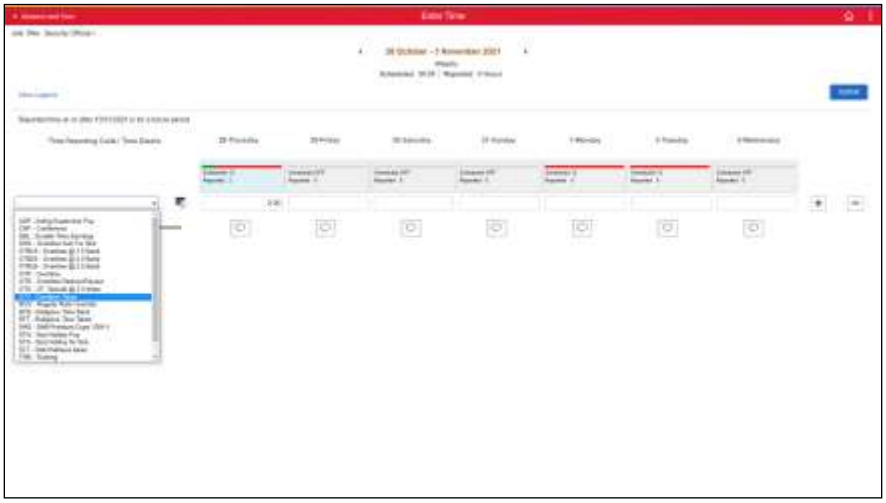
Step	Action
9.	Click the **Submit** button. 
10.	A message appears indicating that the time has gone to your manager, or their designee, for approval. Your manager will need to review and approve the time. Once your manager has approved the time, it needs to be processed. The banked hours will be available the next business day after approval. In this scenario, you requested 2 hours@ 1.5. Upon approval, you will have 3 hours available.
11.	**Note:** The 2 hours of banked overtime you had requested now shows on the Time Summary tile and the balance of 3 hours (2 hours@ 1.5) has been added to your Compensatory Time tile. Your total balance is now 13 hours. To review your compensatory time. refer to the tutorial on "Viewing Compensatory Time (Time Off in Lieu).

Step	Action
12.	You now wish to use banked overtime (i.e. lieu time) on October 28th. **You report lieu time using the Enter Time tile.** Click the **Absence and Time** tile.



Step	Action
13.	Click the **Enter Time** tile.

Step	Action
14.	Click the **Calendar** object.
15.	Report **2** hours of Banked Overtime taken on **October 28.** Click in the **Thursday** field.
16.	Enter **2** hours.
17.	Click the **Time Reporting Code** list. 



Step	Action
18.	Click the **OTT - Overtime Taken** list item. OTT - Overtime Taken

Step	Action
19.	Click the **Submit** button. Submit
20.	A message appears indicating that the time has gone to your manager, or their designee, for approval. Your manager will need to review and approve the time.

Step	Action
21.	You have completed this tutorial. **End of Procedure.**

1.6 Editing Reported Time

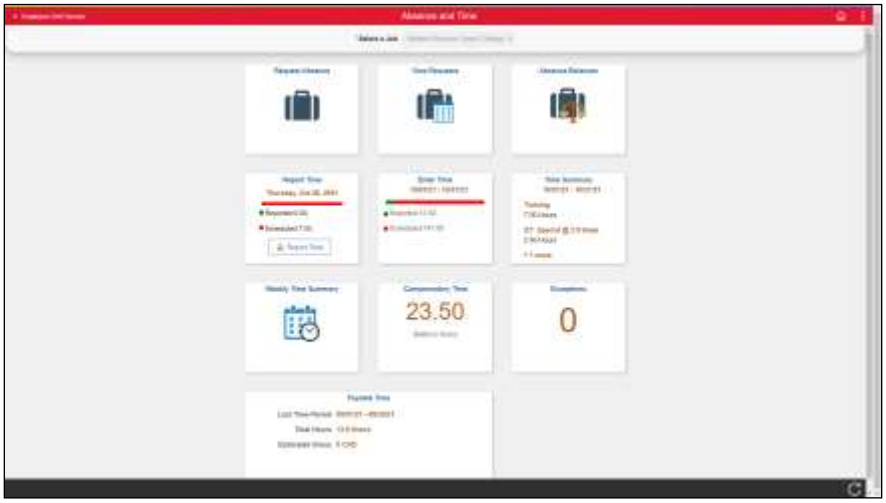
You may wish to make changes to a timesheet. Any changes are subject to the 28-day Rule; only time that is 28 days or less can be revised.

Learning Objectives:

In this tutorial, you will learn how to edit a timesheet.

Procedure

Step	Action
1.	Click the **Absence and Time** tile.



Step	Action
2.	Click the **Enter Time** tile.

Step	Action
3.	You mistakenly reported time on **September 21 and 22** and you now wish to delete the time. Click the **Calendar** object.
4.	Navigate to the appropriate month (e.g. September). Click the **20** link.
5.	To delete time, either delete the hours in the appropriate field or you may delete the entire row. In this scenario you wish to delete the entire row. On some screens, you will need to scroll to the right to see the **Delete** button.
6.	Click the **Delete (-)** button.

Step	Action
7.	Click the **Yes - Delete** button.

Step	Action
8.	**Important:** Once you have revised the time, you need to resubmit it. Click the **Submit** button. Submit
9.	A message appears indicating that the time has been submitted.
10.	You have completed this tutorial. **End of Procedure.**

2.Reporting Vacation and Other Absences

2.1 Overview of Absence Request Process

An employee can request an Absence. The **Absence** may be for a single day or entire week.

The types of Absences that can be requested depends on the employee's collective or employment agreement. Absences may include vacations, sick days, jury duty, etc.

Learning Objectives:

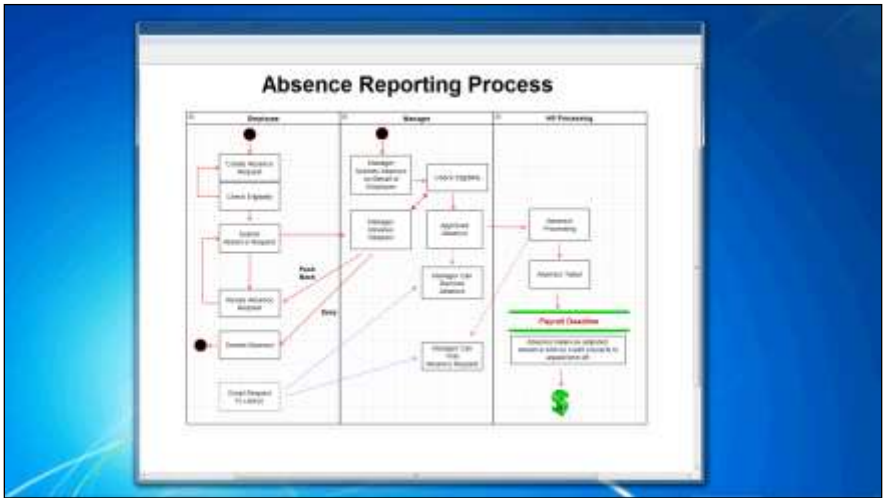
In this tutorial, you will become familiar with:

- the overall process for **Absence Reporting**, and

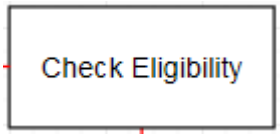
- key terms used in **Absence Reporting** including:

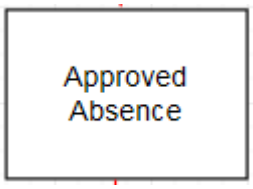
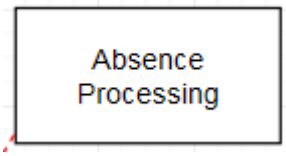
  - Absence Credit
  - Requested Absence,
  - Approved Absence, and
  - Eligibility.

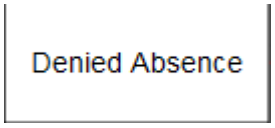
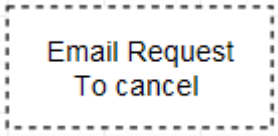
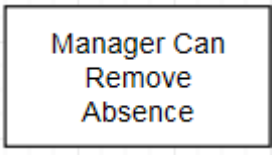
Procedure

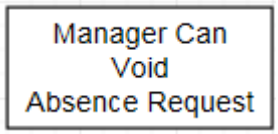
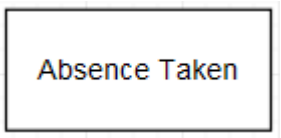
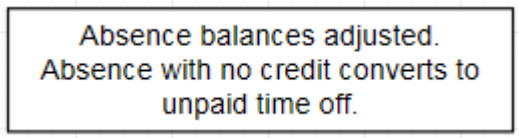


Step	Action
1.	An employee creates an Absence Request. **Press Enter to Continue.**

Step	Action
2.	Then, the **Employee** checks that they will be **Eligible** for the **Absence**. That is, that they run a check to see if they will have sufficient credit for the **Absence**. **Press Enter to Continue.** 
3.	An Absence that is Eligible can be submitted for approval. **Press Enter to Continue.**
4.	Once the **Absence** is **Requested,** it is available for the **Manager** to review. The **Manager** has three options: 1. **Approve** the request. 2. **Push Back** the request and ask for changes, or 3. **Deny** the request. **Press Enter to Continue.**
5.	The **Manager** may Check Eligibility of the Absence Request. If the request is Eligible, it can be Approved. **Press Enter to Continue.**

Step	Action
6.	The Approved Absence waits for the weekly Absence Processing. **Press Enter to Continue.** 
7.	Absence Processing occurs weekly. It is usually on a Monday. If Monday is a holiday, the Processing occurs on the next business day. **Press Enter to Continue.** 
8.	Returning to the Manager Approval, a Manager may Push Back a Request. Typically, a Push Back would be accompanied by a comment that indicates changes requested. **Press Enter to Continue.**
9.	An Absence Request that is Pushed Back can be revised. For example, if too many people have requested a specific day off, the Manager may request an adjustment to the Absence request dates. **Press Enter to Continue.**

Step	Action
10.	Once an Absence Request is revised, it can be (re)Submitted. At this time, the Employee will reconfirm that they are Eligible and then Submit. **Press Enter to Continue.**
11.	Another option for a Manager is to deny a request. This may occur if the employee has taken other Absence and is no longer Eligible. **Press Enter to Continue.**
12.	A Denied Absence Request cannot be revised. **Press Enter to Continue.** 
13.	In some cases, an Employee's plans may change. To request a cancellation of an absence, the Employee can email the manager. **Press Enter to Continue.** 
14.	If the Absence was Approved but not taken, and the Absence has not been processed, it can be removed by the Manager. **Press Enter to Continue.** 

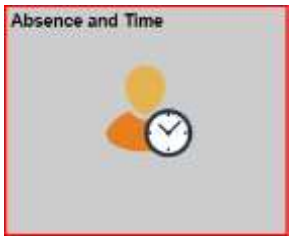
Step	Action
15.	If the Absence was Approved but not taken, and the Absence has been processed, it can be voided by the Manager. **Press Enter to Continue.** 
16.	Unlike Time Reporting, which is done after time events, such as overtime, Absences are requested and approved prior to the event. Approved Absences wait until the Absence has been taken to be processed by Payroll. **Press Enter to Continue.** 
17.	Once taken, the Absence balances are adjusted. **Important:** Note that individuals who do not have sufficient credit for an absence at the time it is taken, will have the absence converted to unpaid time off. **Press Enter to Continue.** 
18.	You have completed this tutorial. **End of Procedure.**

2.2 Viewing and Forecasting Absence Balances

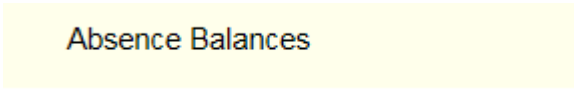
Learning Objectives:

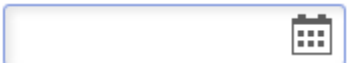
In this tutorial, you will learn how to view and forecast absence balances. This may include vacation, sick, and other entitlements. Your specific absence entitlements will depend upon your employment or collective agreement.

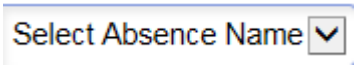
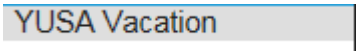
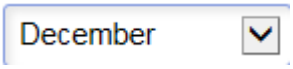
Procedure

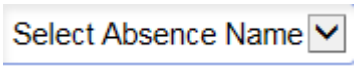
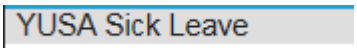
Step	Action
1.	Click the **Absence and Time** tile. 

Step	Action
2.	Click the **View Time** link.

Step	Action
3.	Click the **Absence Balances** link. 

Step	Action
4.	A summary of your absence balances appears; note that these balances are as of the last pay date 01/31/2018. Additionally, your Vacation Accrual Rate appears as well as the date that it will change. In this scenario, wish to *forecast* your ***vacation*** balance as of December 31, 2018. The forecast is different than the total as of the last pay date. Click the **Forecast Balance** link.
5.	Enter **12/31/2018** into the **As of Date** field. 
6.	Now, select an Absence Type. You would like to check your **Vacation** balance. Click the **Filter by Type** list.

Step	Action
7.	Click the **Vacations** list item.
8.	Click the **Absence Name** list. 
9.	Click the **YUSA Vacation** list item. 
10.	Click the **Forecast Balance** button.
11.	In this scenario, Will Smith have a forecast of 11.00 vacation days. This is less than the current 20.86 days because: It includes: - absences approved, but not yet taken, - absences submitted, but not yet approved, and - absences approved, but not yet processed. (An example would be a summer vacation.) But does not include: - the vacation entitlement for December 2018 itself, to include December, the forecast **As of Date**, would need to be January 1, 2019. Click the **Close** button.
12.	In this scenario, you now wish to check your **Sick Days** (ie. Sick Leave) forecast as of March 12th, 2018. You need to adjust the time period. Click the **Calendar** button.
13.	Click the **Month** list. 
14.	Click on **March.**

Step	Action
15.	Click on March **12**.
16.	Click the **Filter by Type** list.
17.	Click the **Sick Leave** list item.
18.	Click the **Absence Name** list. 
19.	Click the **YUSA Sick Leave** list item. 
20.	Click the **Forecast Balance** button.
21.	The forecast for Will Smith is 4.50 sick days as of March 12. Click the **Close** button.
22.	You have completed this tutorial. **End of Procedure.**

2.3 Requesting Vacation, Sick Days, and other Absences

Learning Objectives:

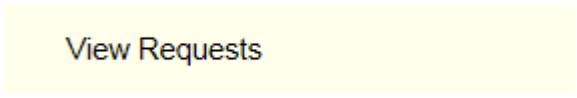
In this tutorial, you will learn how to request absences. This may include vacation, sick, and other types of absences.

Procedure

Step	Action
1.	Please note that **Request Absence** page is not used for: 1) time off using compensatory "comp" banks 2) requests for activities during the work day such as training, conferences and union duty leave; these requests are done through the Timesheet page. 2) any unpaid absences beyond 5 days duration, such as Long-Term Disability, or Maternity/Parental/Adoption leave; these requests should follow current business practices.

Step	Action
2.	Click the **Absence and Time** tile

Step	Action
3.	Before you request an absence, you can forecast your balances to ensure that you have the required credits. For more information, check the tutorial on Viewing and Forecasting Absence Balances. **Viewing Balances** is available under the **View Time** menu. You are ready to proceed. Click the **Absence Name** list. *Absence Name Select Absence Name
4.	Click the **YUSA Vacation** list item. YUSA Vacation
5.	Click the **Absence Reason** list. *Reason Select Absence Reason
6.	Click the **Vacation** list item. Vacation
7.	The start date defaults to the current date. In this scenario, the current date is March 23, 2018. Now, specify an end date. This can be done by entering a date in the mm/dd/yyyy format or by selecting a date from the calendar. In this scenario, you wish to use a calendar. Click the **Calendar** button.

Step	Action
8.	Click on March **23.**
9.	The duration of the vacation is 1 day. This has been automatically calculated based on the dates given. Now, you must check that you are eligible for the requested vacation time. Click the **Check Eligibility** button.
10.	A message appears indicating that you are Eligible at the time the vacation was requested. However, if you request and take additional vacation days, you may not have sufficient credit by the time you take this specific vacation day. Click the **OK** button.
11.	Click the **Submit** button.
12.	Click the **Yes** button.
13.	A message appears indicating that the request was submitted successfully.
14.	You wish to view the status of all absence requests that you have made. Click the **View Requests** link. 

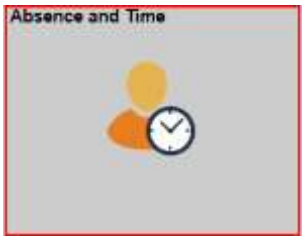
Step	Action
15.	The new absence request (i.e. vacation) appears. The status of the request is **Submitted.** Once your manager has reviewed a request, it may be: - **Approved** - **Pushed Back** - for you to change, or - **Denied**, if the request cannot be accommodated. In some cases, you may need to report an absence that has already occurred. An example is that you have been off sick and upon return to work, you report Sick Leave. Note: You manager cannot approve absence requests that are older than 60 Days or approximately two months Therefore, it is important to keep your absence reporting up to date.
16.	You have completed this tutorial. **End of Procedure.**

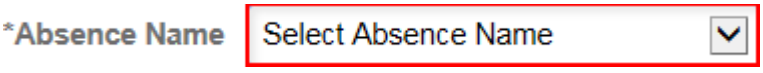
2.4 Requesting a Partial Day Absence

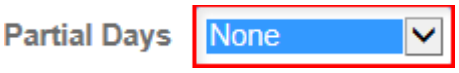
Learning Objectives:

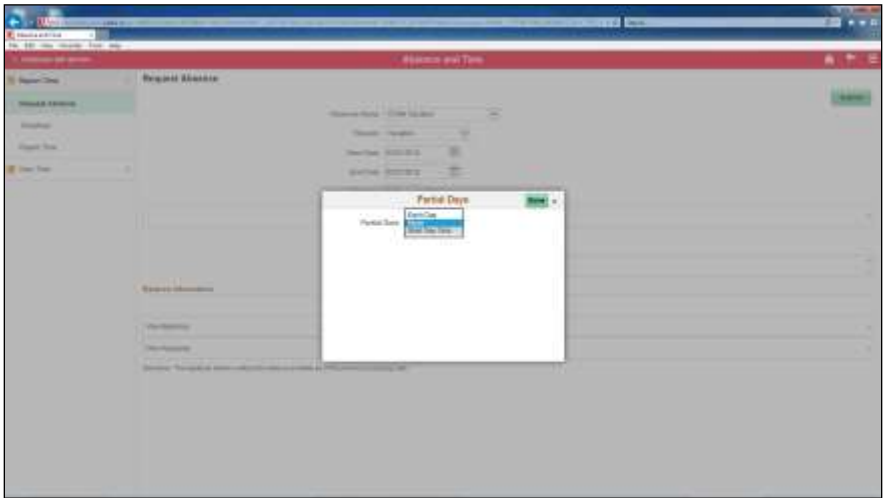
In this tutorial, you will learn how to request a partial day absence. This may include vacation, sick, and other types of absences.

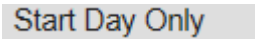
Procedure

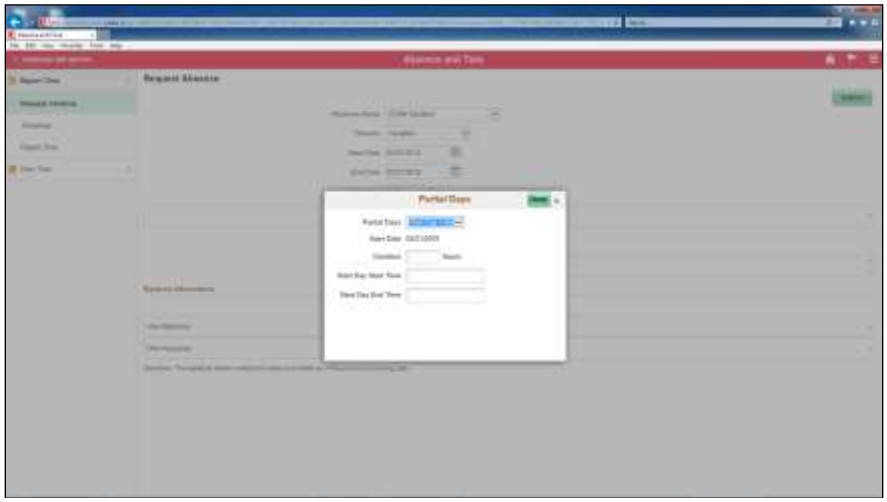
Step	Action
1.	Click the **Absence and Time** tile. 

Step	Action
2.	Before you request an absence, you can forecast your balances to ensure that you have the required credits. For more information, check the tutorial on Viewing and Forecasting Absence Balances. **Viewing Balances** is available under the **View Time** menu. You are ready to proceed. Click the **Request Absence** link.
3.	Click the **Absence Name** list. 
4.	Click the **YUSA Vacation** list item.

Step	Action
5.	Click the **Reason** list.
6.	Click the **Vacation** list item.
7.	Click in the **End Date** field.
8.	This is an absence that occurs over a single day, March 21. You can enter the date using a calendar or enter the date in MM/DD/YYYY format. March 21, 2018 is 03/21/2018. Enter **03/21/2018** in the **End Date** field.
9.	Click the **Partial Days** link.
10.	Click the **Partial Days** list. 



Step	Action
11.	You have two options for reporting the absence: Each Day, Start Day Only. Since this is a one-day absence, these options are the same. If this was a multi-day absence, Start Day would be used to report the length of absence on the first day; Every Day would be used to report an absence on every day. You will report **Start Day Only.** Click the **Start Day Only** list item. 



Step	Action
12.	Note: For partial day absences remember that you are reporting the hours that you are **Absent,** NOT the hours that you are at work. Click in the **Duration** field.
13.	You plan to be away 2 hours as a partial day absence. Enter **2** hours.

Step	Action
14.	Since you are requesting to be away from work, the Start Time is when your absence **begins.** Click in the **Start Day Start Time** field. Start Day Start Time
15.	You are requesting an absence from 1:00 to 3:00 in the afternoon. Note that you have two options for entering time. For 1:00 in the afternoon, you can enter: **13:00,** from the 24 hour clock, or **1:00PM**, using AM/PM to denote the time of day on a 12 hour clock. If you enter 1:00, it will be interpreted as a 24hr clock time of 1:00 am. In this example, we will use the 24hour clock and let the system convert the time to the AM/PM format. Enter "**13:00**" into the **Start Day Start Time** field. Start Day Start Time
16.	You are requesting an absence from 1:00 to 3:00 in the afternoon. Again, you have two options for entering time. For 3:00 in the afternoon, you can enter: **15:00,** from the 24-hour clock, or **3:00PM**, using AM/PM to denote time of day. If you enter 3:00, it will be interpreted as 3:00 on the 24-hour clock. Click in the **Start Day End Time** field. Start Day End Time
17.	You are requesting an absence from 1:00 to 3:00 in the afternoon. Enter "**15:00**" into the **Start Day End Time** field. Start Day End Time
18.	Click the **Done** button.

Step	Action
19.	Note that the Start Day, Start Time and End Time has been converted from 13:00 to 1:00 PM and from 15:00 to 3:00 PM respectively. Additionally, the 2 hour duration has been converted to 0.29 Days. This calculation is based on your regularly scheduled work day. In this example, the individual has a 7 hour work day. (2/7)=0.29 days. You need to Check that you currently have sufficient credit to take this absence. The **Check Eligibility** will Forecast your vacation balance. Click the **Check Eligibility** button.
20.	Click the **OK** button.
21.	Click the **Submit** button.
22.	Click the **Yes** button.
23.	You have completed this tutorial. **End of Procedure.**

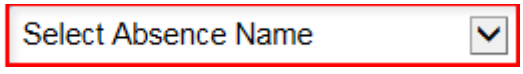
2.5 Requesting a Partial Day Absence Before a Multi-Day Absence

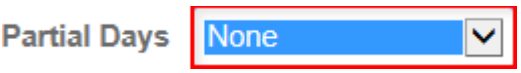
Learning Objectives:

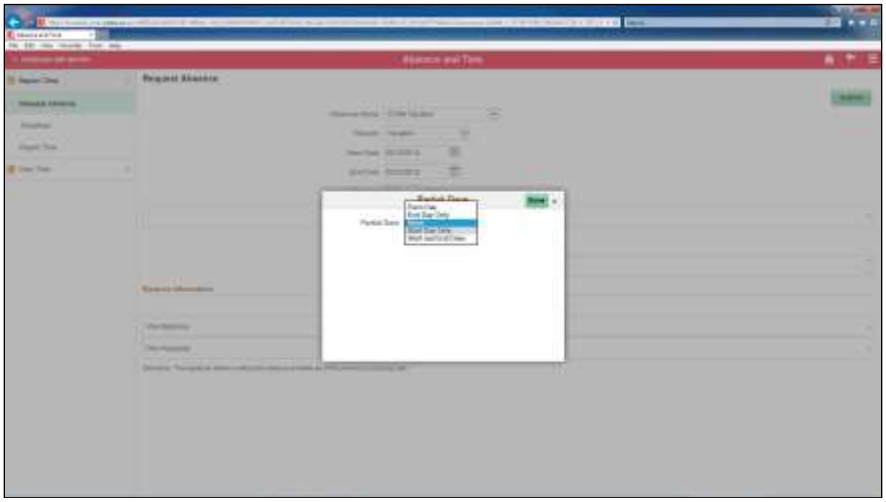
In this tutorial, you will learn how to request a multiple day absence starting with a partial day.

Procedure

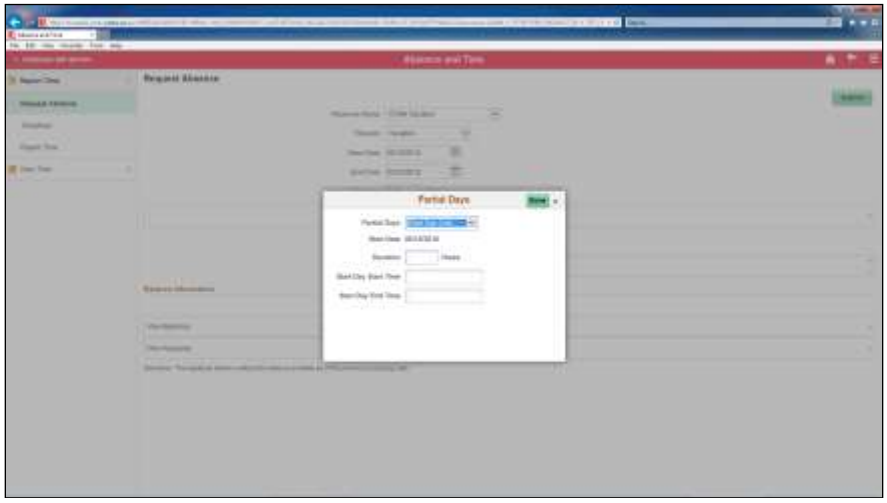
Step	Action
1.	Click the **Absence and Time** tile.

Step	Action
2.	Click the **Absence Name** list. 

Step	Action
3.	Click the **YUSA Vacation** list item.
4.	Click the **Reason** list.
5.	Click the **Vacation** list item.
6.	Click the **Calendar** button.
7.	You wish to take 2 hours of vacation on May 18 and leave early. Click the **18** link.
8.	Click the **Calendar** button.
9.	You wish to take May 22 and 23 as vacation days. So, the absence requested ends on May 23. Click the **23** link.
10.	The Absence currently spans three days. However, you only want a partial day absence for the first day. Click the **Partial Days** link.
11.	Click the **Partial Days** list. 



Step	Action
12.	Note that there are several options: **A. Each Day.** An example of this is if you plan to use vacation time to shorten every work day for a week by one hour. In this case, you would report a 1-hour absence Each Day for a week. **B. End Day Only.** An example of this is if you wish to arrive 2 hours late to work on the last day of the Absence Period but work the rest of the day. These two hours would be an absence. **C. Start Day Only** is similar to B except that you wish to start your absence period with a partial day absence. An example would be a request to leave 2 hours early on the first day. **D. Start and End Days** allows for an absence on the first and last day. In this scenario, you wish to leave early on the Friday. This would be an absence of 2 hours from work. Click the **Start Day Only** list item. Start Day Only



Step	Action
13.	Click in the **Duration** field. Duration
14.	**Note:** For partial day absences remember that you are reporting the hours that you are **Absent,** NOT the hours that you are at work. Enter **2** into the **Duration** field. Duration
15.	Click in the **Start Day Start Time** field. Start Day Start Time
16.	Since you are requesting to be away from work, the Start Time is when your absence **begins.** You normally work 8:00 am to 4:00 pm. You wish to leave at 2:00 PM. If you enter 2:00, it will be interpreted as a 24hr clock time of 2:00 am. In this example, we will use the 24hour clock and let the system convert the time to the AM/PM format. Enter "**14:00**" into the **Start Day Start Time** field. Start Day Start Time
17.	Click in the **Start Day End Time** field. Start Day End Time

Step	Action
18.	You normally work 8:00 am to 4:00 pm. So, your absence ends at 4:00 pm. If you enter 4:00, it will be interpreted as a 24hr clock time of 4:00 am. You need to ender 16:00. Enter "**16:00** into the **Start Day End Time** field. Start Day End Time
19.	Click the **Done** button.
20.	The Start and End Times for the partial day absence have automatically been converted to the 12 hour clock. The **Duration** of the Absence has been adjusted from 3.00 to 2.33 days to reflect the partial first day absence. Click the **Check Eligibility** button.
21.	Click the **OK** button.
22.	Click the **Submit** button.
23.	Click the **Yes** button.
24.	You have completed this tutorial. **End of Procedure.**

2.6 Checking the Status of Absence Requests

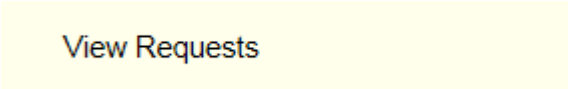
Learning Objectives:

In this tutorial, you will learn how to view the status of absence requests.

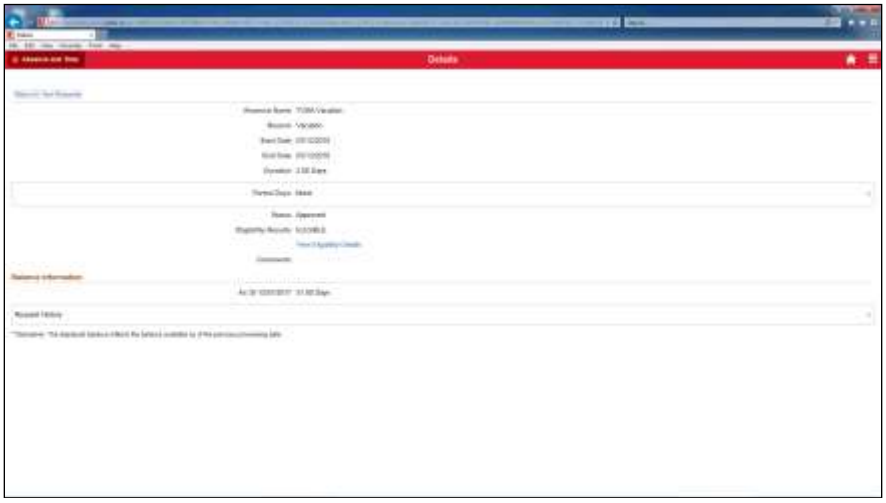
Procedure

Step	Action
1.	Click the **Absence and Time** tile.

Step	Action
2.	Click the **View Time** link.

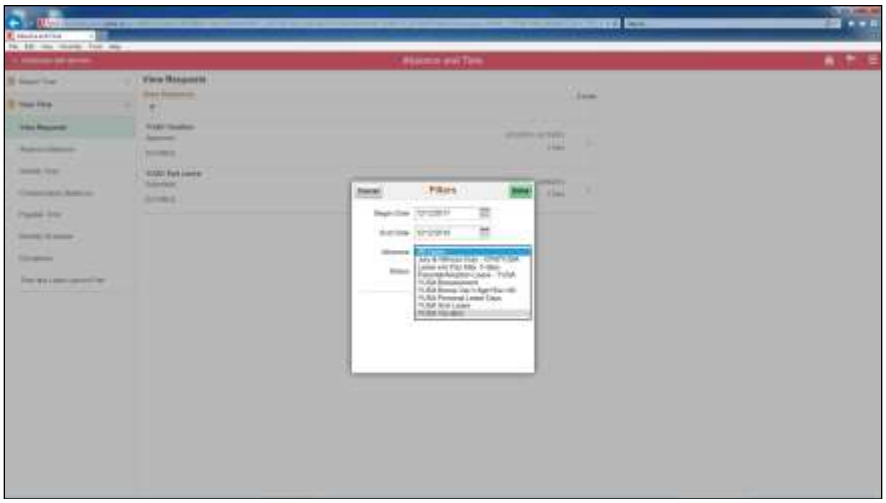
Step	Action
3.	Click the **View Requests** link. 

Step	Action
4.	By default, all of the absence types are displayed. In this example, there are both vacation and sick day requests. The Vacation is Approved. The Sick Leave is submitted and waiting for review by the manager. By default, Absence Requests for up to 180 days prior to the current date are displayed. You can view the details of a particular absence request. In this scenario, you wish to look at the details of the approved vacation. Click the **More** button.

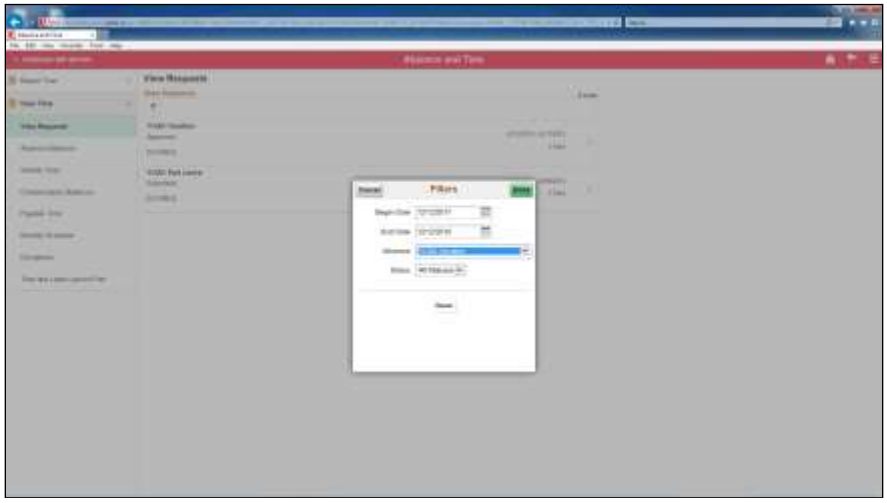


Step	Action
5.	Return to the prior page. Click the **Absence and Time** link.

Step	Action
6.	Using the **Filter**, you can view absence requests: - within a specific date range, and/or - by Absence Type. In this example, you would like to view all only vacation requests from December 12, 2017 to December 12, 2018. Click the **Filter** button.
7.	The current date is 12/12/2017. You can change the End Date by using the calendar or entering the date directly. For December 12, 2018, enter "**12/12/2018**".
8.	To view specific types of absences, click the **Absence Type** list.



Step	Action
9.	Select Vacation with a Reason of Vacation. Click the **YUSA Vacation** list item.



Step	Action
10.	Click the **Done** button.
11.	Only vacation requests are displayed for the time period specified.
12.	You have completed this tutorial. ***Congratulations!*** You have also completed the Time Reporting Tool for Employees course. **End of Procedure.**

Additional Time Reporting Tool (TRT) Topics for Employees

1. Viewing Time and Absence Summary Information

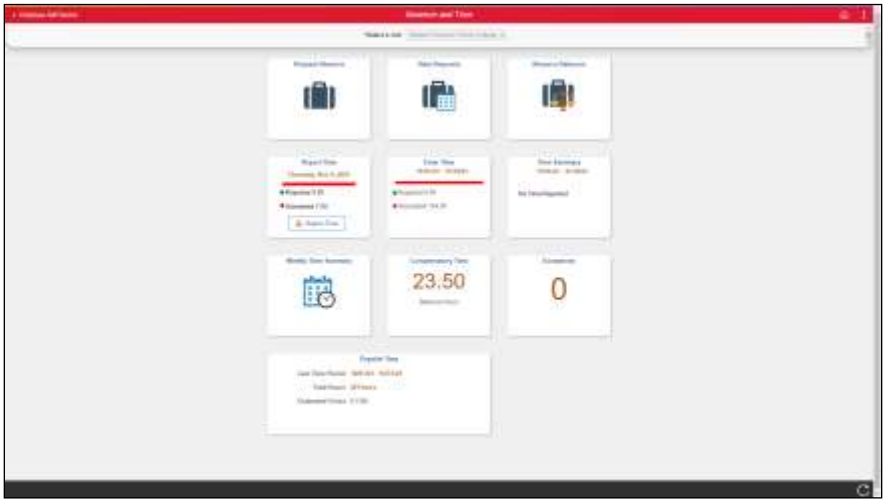
1.1 Viewing a Summary of Payable Time

Learning Objectives:

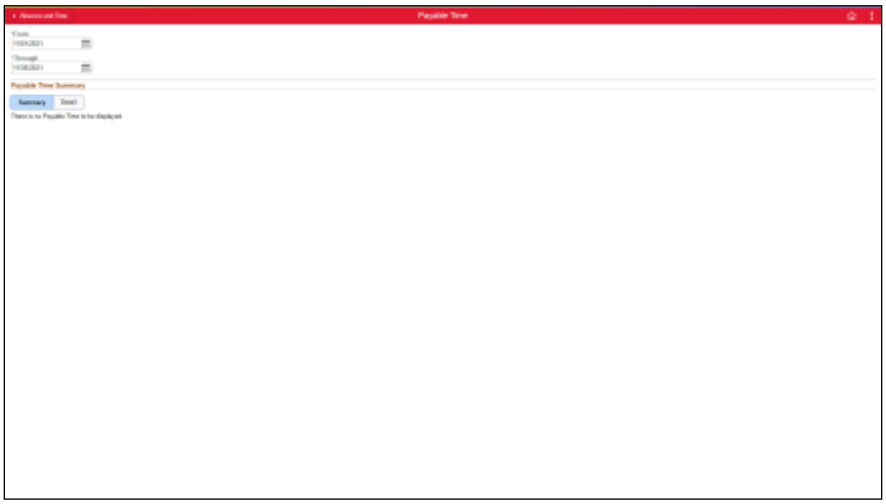
In this tutorial, you will learn how to view **Payable Time** for a specific time period.

Procedure

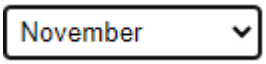
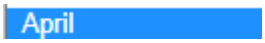
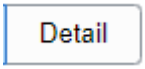
Step	Action
1.	**Payable Time** is available from the **Payable Time** tile within the **Absence and Time**. Click the **Absence and Time** tile.



Step	Action
2.	Click the **Payable Time** tile.



Step	Action
3.	You wish to view the **Payable Time** for **April, 2021.** You will need to change the time period. Click the **Calendar** button.
4.	Click the **Month** list.

Step	Action
5.	Click the **April** list item.
6.	Click the **April 1** link.
7.	The summary of Payable time from April 1 to November 30 appears. **Note:** Both Time and Absence information appears. However, you wish to view only the month of April. You will need to select a April 30 end date. Click the **Calendar** button.
8.	Click the **Month** list. 
9.	Click the **April** list item. 
10.	Click the **April 30** link.
11.	A summary of Time and Absence for the month of April appears. You wish to confirm the date of the overtime hours. For this, you will need to look at the daily **Detail** information. Click the **Detail** button. 
12.	The detail, by day, of the payable time appears.
13.	**End of Procedure.**

1.2 Viewing and Resolving Exceptions to Timesheets

Once your timesheet has been approved by your manager a nightly process (i.e. Time Administration) runs.

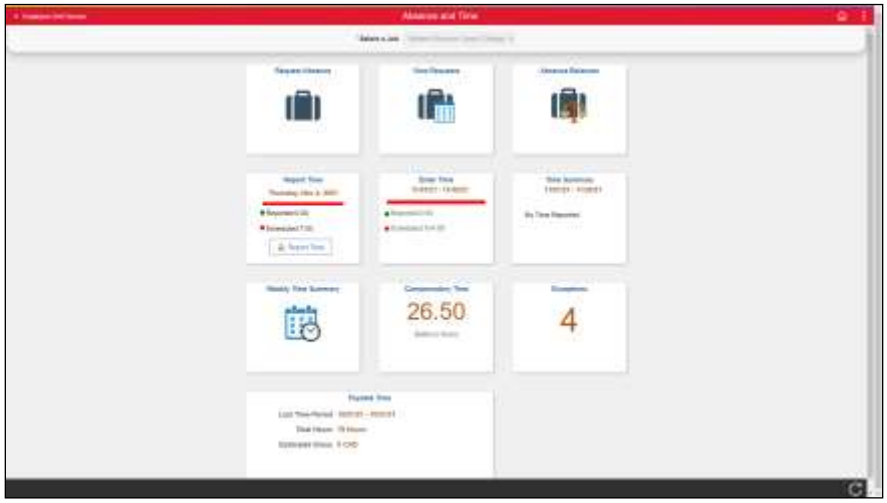
This process checks for potential errors or "**Exceptions**". Note that only approved Timesheets are processed. Employees should review any **Exceptions** as they occur so that they can make corrections in a timely manner.

Learning Objectives:

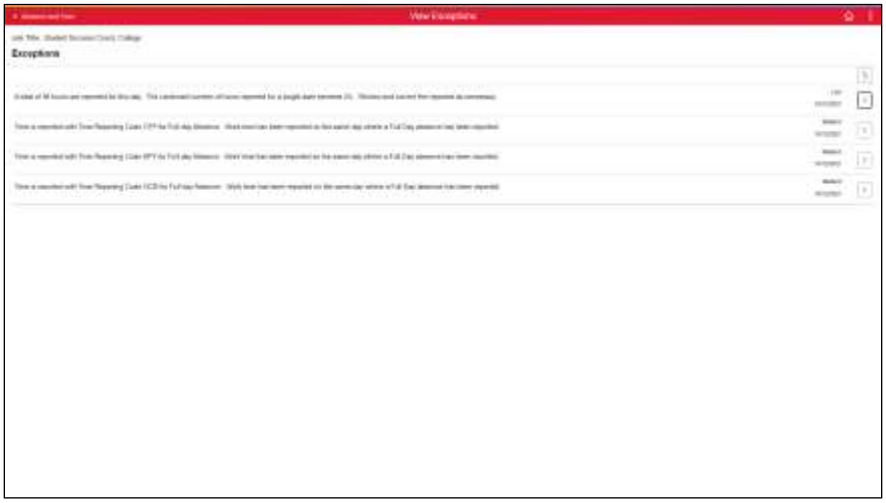
In this tutorial, you will learn how to:
- see if your approved timesheet has any potential errors, and
- fix a timesheet error.

Procedure

Step	Action
1.	You can access the **Exceptions** tile within Absence and Time. Click the **Absence and Time** tile.



Step	Action
2.	The **Exceptions** tile shows the number of reported time errors. Click the **Exceptions** tile
3.	A summary of all potential errors (**Exceptions**) appears. If this list is empty, you have no **Exceptions** to review. **Note: Exceptions** also appear on the Enter Time page for specific dates that have potential errors.
4.	The list of **Exceptions** can be sorted by Explanation, Severity of Exception (low, medium, high), or Date. ***Low*** severity exceptions are warnings and may be either corrected or your manager can allow them if they are not errors in time reporting. ***Medium*** severity exceptions are errors in time reporting that need to be reviewed and corrected. ***High*** severity exceptions are errors that need to be reviewed and corrected before the payroll submission deadline to avoid impact on pay. Only managers can fix high severity exceptions.



Step	Action
5.	In this scenario, there are exceptions on October 12th and you wish to review the ***medium*** exception: "*A total of 36 hours are reported for this day. The combined number of hours reported for a single date exceeds 24. Review and correct the reported as necessary.*" Click the **Arrow** button in the associated row.
6.	Resolving exceptions will depend on the specific scenario. It could mean deleting or reversing time, or allowing if it's not an error. In this scenario, there is an error on Tuesday, October 12, as indicated by the red triangle warning icon. The 12 hours OTP and SPY were reported accidently and therefore exceeded 24 hours. You must delete them now.

Step	Action
7.	Locate the OTP - Overtime row that is incorrect and click the associated **Delete (-)** button.

Step	Action
8.	Click the **Yes - Delete** button to confirm.

Step	Action
9.	Complete the same process for the SPY - Shift Premium YUSA. Once all time is deleted, you must resubmit to ensure the changes are updated. Click the **Submit** button. Submit
10.	The rows with the error have now been deleted. The Time Administration process will run overnight and this **Exception** will be removed from the **Exceptions** list.
11.	**End of Procedure.**

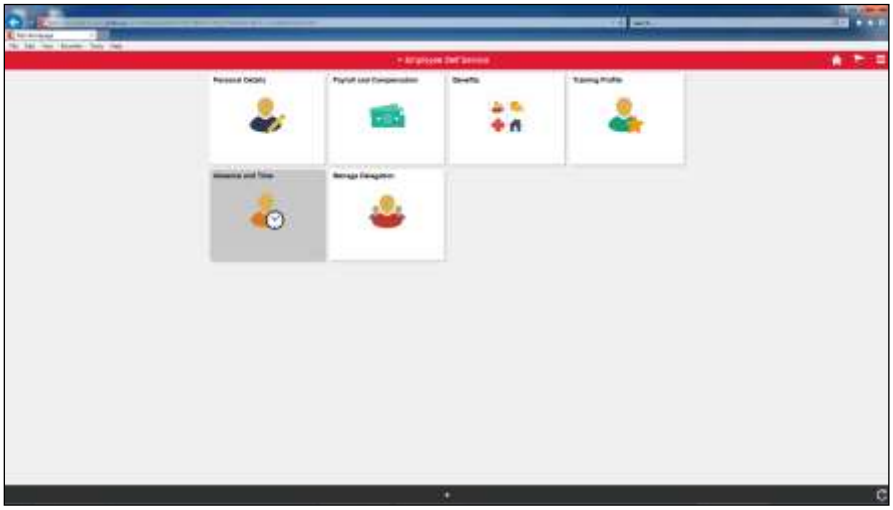
1.3 Viewing Time Summary

You can use the **Time Summary** tile to view your reported hours on a monthly basis including:
- reviewing approved time such as overtime and
- reviewing approved absences such as vacation.

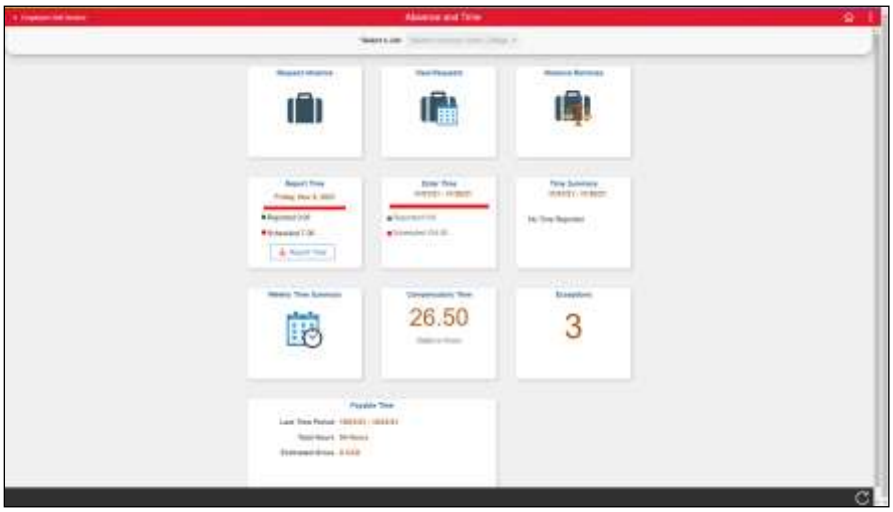
Learning Objectives:

In this tutorial, you will learn how to view a monthly work schedule including:
- confirming scheduled Holidays, and
- reviewing approved absences.

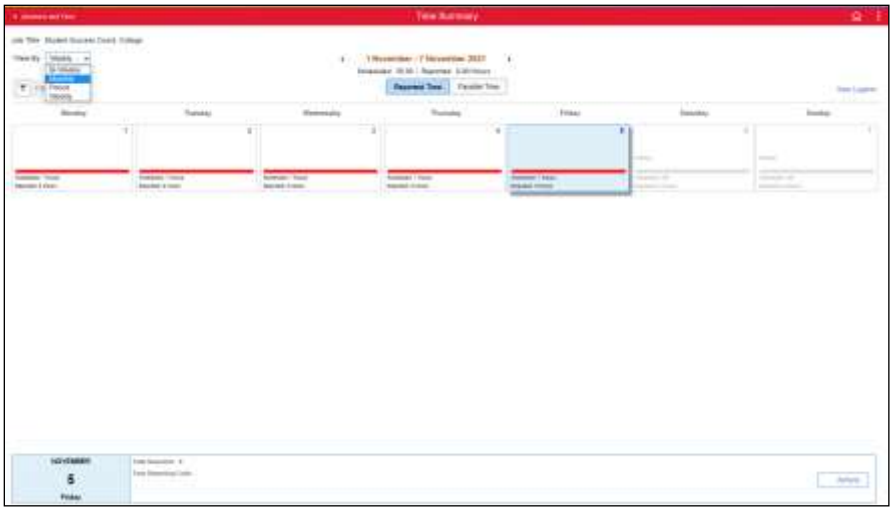
Procedure

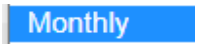


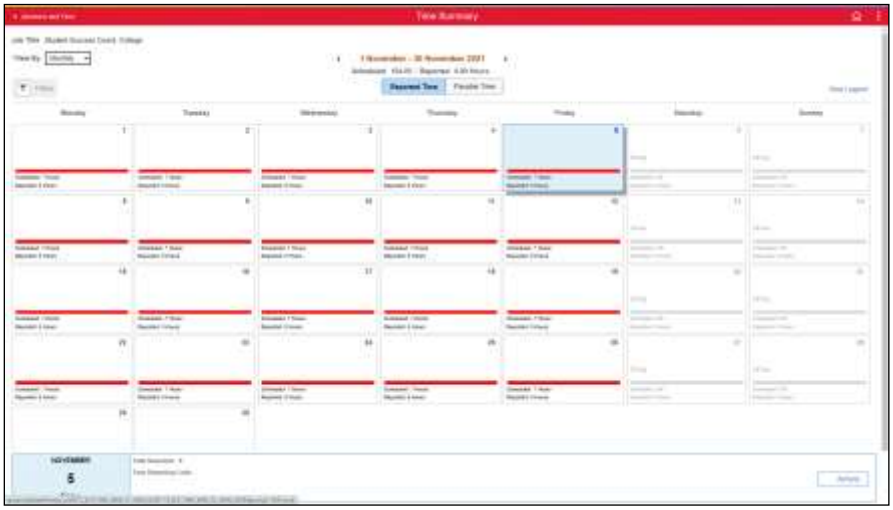
Step	Action
1.	You can access the **Time Summary** tile within Absence and Time. Click the **Absence and Time** tile.



Step	Action
2.	Click the **Time Summary** tile. **Note:** The tile will display only the current month's reported time.
3.	The **Time Summary** page appears and defaults to the current week. Click the View By to change to bi-weekly, monthly, pay period or weekly. Click the **View By** list.



Step	Action
4.	Click the **Monthly** list item. 



Step	Action
5.	The page refreshes and loads the data for the current month. I You can change the month by using the **Left** and **Right arrows**. Click the **Left** arrow. ◀
6.	The **Reported Time** for October appears.
7.	To view full details for a specific day, click the **Date** link. Click **12**. 12
8.	On October 12, the following information is displayed: **Total Reported** - the total number of hours that you report for the day. **Time Reporting Code** - the time reporting code used for any reported time or absence. **Note:** Approved absences appear with a suitcase icon. In this scenario, you reported 12 hours of on-call regular and 7 hours of vacation, for a total of *19.*
9.	**End of Procedure.**

2. Employees on Work Accommodation

2.1 Reporting a Timesheet as an Hourly Employee - Work Accommodation

Work Accommodation, for the purpose of Time and Absence reporting, is when an employee has been approved for a modified work schedule. Employees on other work arrangements follow their normal process for time and absence reporting.

An employee on a modified work schedule may be instructed to do one of the following:

Employees with available Absence Credits should report any **unworked time** as an **Absence Request**. This follows the normal process for Absence Requests.

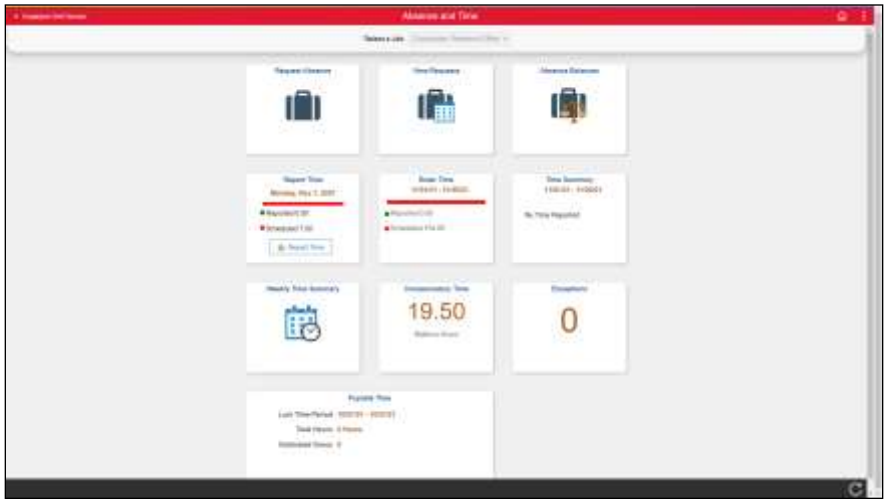
Otherwise, Managers may instruct employees to report **worked time**. If instructed, employees can report their worked time on a **Enter Time** or through the mobile application **Report Time**. This is called "Positive Time Reporting" where only the time reported and approved is processed for payment.

Learning Objectives:

In this tutorial, you will learn how to:
- submit payable work hours on a timesheet for approval, and
- add a comment to the hours reported for one day.

Procedure

Step	Action
1.	Click the **Absence and Time** tile.



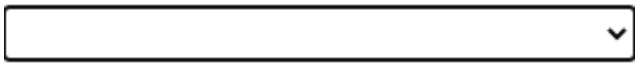
Step	Action
2.	You will report worked time on the **Enter Time** tile. You worked **5** hours **Monday to Thursday** and **4** hours on **Friday.** Click the **Enter Time** tile.

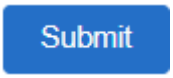
Step	Action
3.	Click in the **Monday** field.
4.	Enter the desired information into the **Monday** field. Enter "**5**".

Step	Action
5.	Click in the **Tuesday** field.

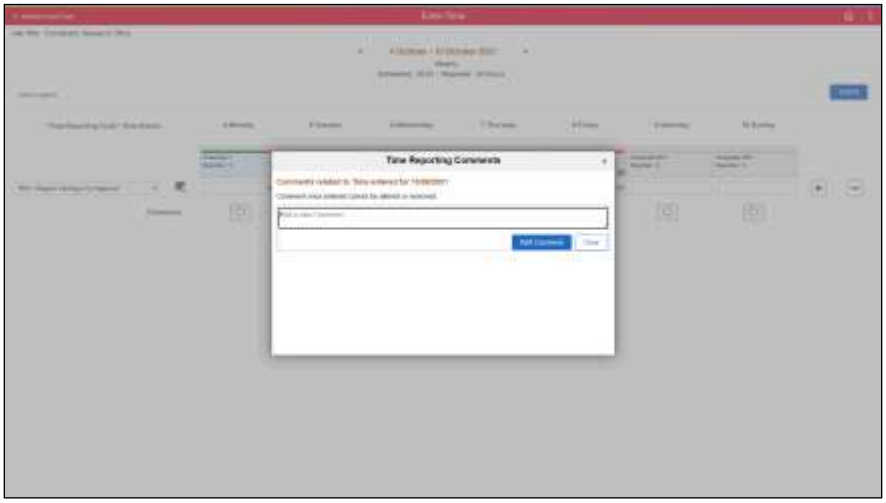
Step	Action
6.	Enter **5** hours into the **Tuesday** field.
7.	Click in the **Wednesday** field.

Step	Action
8.	Enter **5** hours into the **Wednesday** field.
9.	Click in the **Thursday** field.
10.	Enter **5** hours into the **Thursday** field.
11.	Click in the **Friday** field.
12.	Enter **4** hours into the **Friday** field.

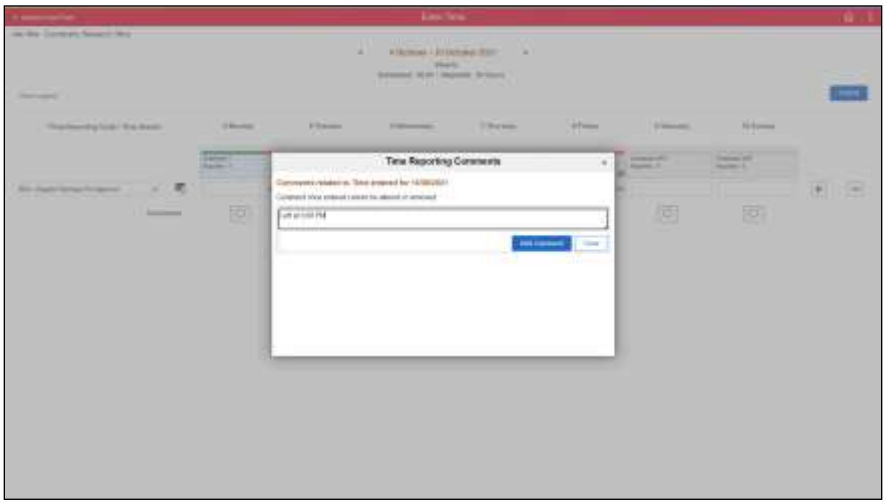
Step	Action
13.	Time reported uses **Time Reporting Codes or TRCs**. Only the Time Reporting codes applicable to your role will appear. Click the **Time Reporting Code** dropdown button to activate the menu. 
14.	The hours reported are "regular' hours unless your manager indicates otherwise. The Time Reporting Code is REA. Click the **Regular Earnings For Approval** list item.

Step	Action
15.	Click the **Submit** button. 
16.	The reported time has been submitted and requires approval by your manager. You can add a comment to any row. In this scenario, you wish to make a note about the shorter work day on Friday.

Step	Action
17.	To add a comment, select the **Comment** button.



Step	Action
18.	**Note:** Comments are permanent. They cannot be edited later, however, additional comments can be added. Click in the **Comment** field.



Step	Action
19.	Enter any notes into the **Comment** field. In this scenario, enter "**Left at 3:00.**" or press **<Enter>.**
20.	Click the **Add Comment** button. Add Comment

Step	Action
21.	You have completed this tutorial. ***Congratulations!*** You have also completed the Additional Time Reporting Tool for Employees course. **End of Procedure.**

Time Reporting Tool (TRT) for Casual Employees

1. Reporting Time

1.1 Overview of the Time Reporting Process

As a casual employee, you are considered a **Positive Time Reporter.** This means you must report regular hours worked in order to be paid for those hours. You also need to report exceptions to your regular hours e.g. overtime or shift premium. Please refer to your employment or collective agreement for specific details on entitlements.

York University uses:

Employee Self Service (ESS) to provide access to an individual's own HR information,
Reviewer Self Service (RSS) to provide access to casual employees' submitted time for validation; and
Manager Self Service (MSS) to provide access for managerial approval.

The **Time Reporting Tool** is available through ESS.

ESS is used to Report Time. RSS is used to Validate Time. MSS is used to Approve Time.

Learning Objectives:

In this tutorial, you will become familiar with:

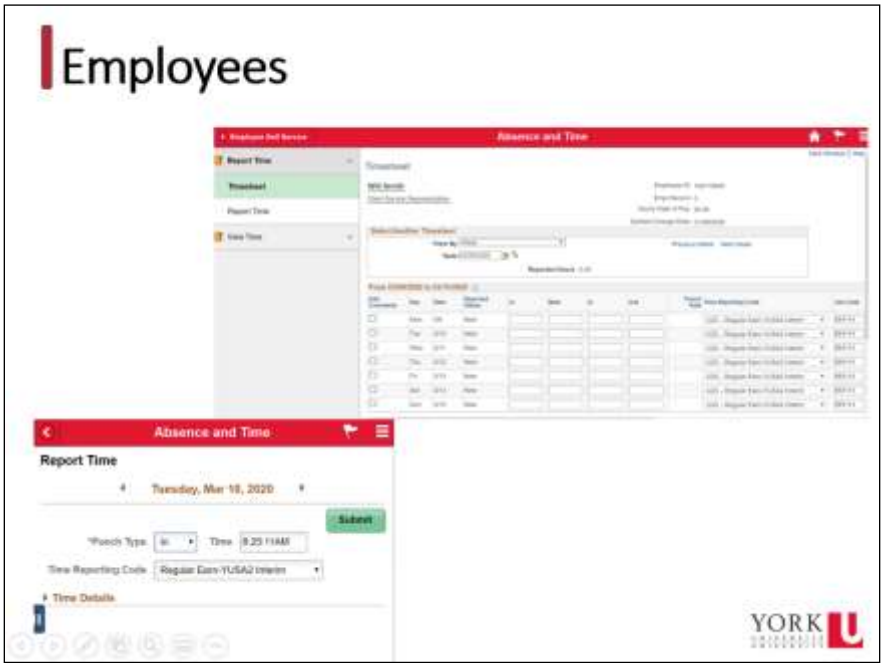
- the overall process for **Time Reporting,** and

- key terms used in **Time Reporting** including:
- Requested Time,
- Approved Time,
- Exceptions, and
- Payable Time.

Procedure

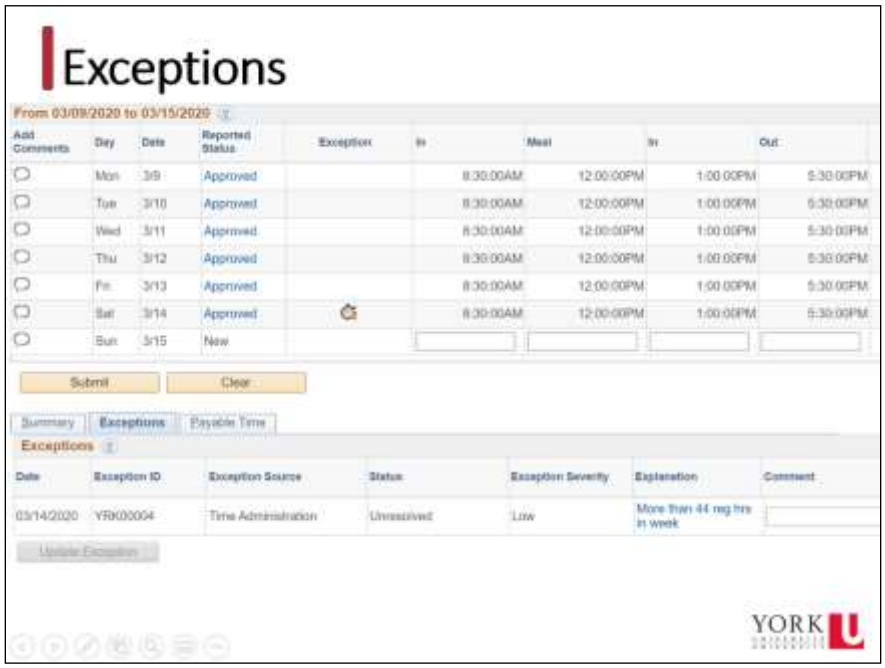
Step	Action
1.	As a casual employee, you are considered a **Positive Time Reporter.** This means you must report regular hours worked in order to be paid for those hours. You also need to report exceptions to your regular hours e.g. overtime or shift premium. Please refer to your employment or collective agreement for specific details on entitlements. The Time Reporting Tool is available through Employee Self Service.

Step	Action
2.	There are three roles in the system: 1. Employee 2. Reviewer (if applicable) 3. Manager Once all three roles have actioned their respective steps, HR processing in the system occurs.



Step	Action
3.	There are two methods an employee uses to **Report Time**: 1. A *Enter Time* page using a computer 2. A *Report Time* page using a mobile device Employees record the start and end time, including a meal break for each day. This is considered “Punch” time. The types of time reported depends on the employee's collective or employment agreement. For example, some collective agreements include reporting *Overtime* and *Shift Premium*.

Step	Action
4.	Once time has been submitted, if the department is using a **Reviewer** for time validation, it is sent to the reviewer to action. The reviewer has four options: a) Validate the time reported; b) Push Back the reported time and ask for changes and resubmission; c) Revise the time on behalf of the employee, if necessary; or d) Deny the time reported. Note: If there is no reviewer, the time goes directly to the manager for approval.
5.	4. Once validated, the time is available for the manager to approve. The manager has four options: a) Approve the time reported; b) Push Back the reported time and ask for changes and resubmission; c) Revise the time on behalf of the employee, if necessary; or d) Deny the time reported.
6.	Time reported that is **Pushed Back** can be revised and resubmitted.



Step	Action
7.	Once time is approved, it is checked for errors. Errors are called **Exceptions** and may include calculation errors (e.g. an employee mistakenly reports more than 24 hours in a day) or reports time inconsistent with collective agreements. The process to check for errors runs nightly. Only time reported without critical errors will move to processing. The reviewer and/or manager makes corrections to resolve exceptions. This may include: - Allowing the exception - Changing the time reported - Asking the employee to add additional time depending on the situation **Note:** Time with critical exceptions cannot be paid; the exceptions must be resolved.
8.	Time reported that had exceptions and was revised is then reviewed again for potential errors.
9.	**Reported Time** that is both approved and without critical exceptions, awaits processing.
10.	**Approved Time** available for processing prior to the *Payroll Deadline* will be processed for payment. Otherwise, it will be processed after the next payroll deadline.
11.	The time reporting approval deadline is outlined in the Payroll Schedule that is located on the Employee Resources tab of YU Link under the path: **Employee Resources > Compensation and Payroll > How and When you Get Paid > Payroll Schedule**
12.	Any time that is approved prior to the payroll deadline, and without *Critical Exceptions*, is processed. Where applicable, **Payable Time** is processed for payment. In some cases, corrections to timesheets may result in an adjustment on the pay.
13.	If you have questions after you take the remainder of this online training, please contact your reviewer and/or manager, or your local HR representative. For technical issues, contact hrhelp@yorku.ca.
14.	You have completed this tutorial. You now have a better understanding of the **Time Reporting Process**. **End of Procedure.**

1.2 Reporting Daily Time on a Phone or Mobile Device

There are two ways to report time. It is recommended that you use:

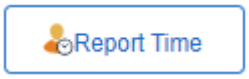
- **Report Time** on a **smartphone** or other **mobile device** and
- **Enter Time** on a **desktop** or **laptop**.

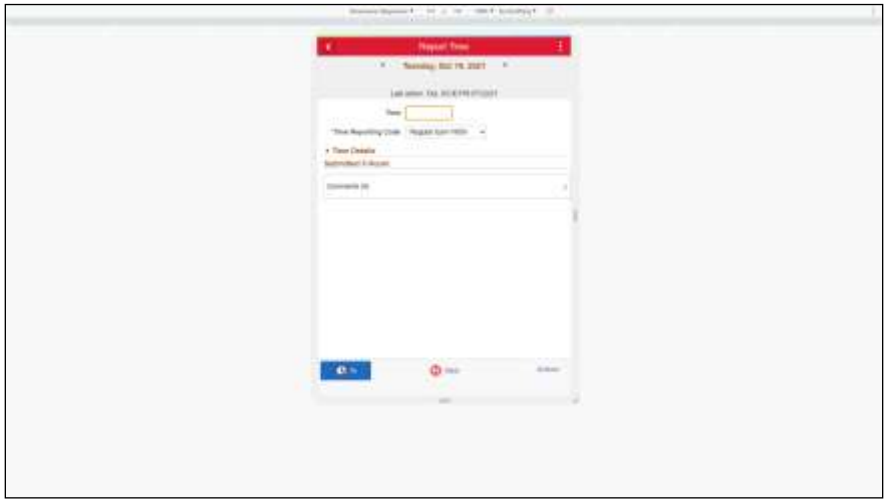
Note: You cannot revise reported time using a smartphone/mobile device.

Learning Objectives:

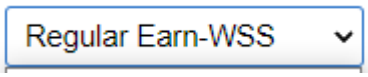
In this tutorial, you will learn how to ***Report Time*** on a smartphone/mobile device.

Procedure

Step	Action
1.	To begin reporting time, click the **Absence and Time** tile.
2.	If you have two different jobs, you will be prompted to select the job for which you wish to report time before proceeding. Each job is administered separately. If you only have 1 job, you will proceed directly to the next step.
3.	Click the **Report Time** button. **Note:** Employees will lose access to time entry on the end of casual assignment date. Therefore, employees **must** report time *before* the end of day on that date. 
4.	The **Report Time** page appears and defaults to the current day. If you are not reporting time for today, select the appropriate day using the arrows. **Note:** Time reported is for actual time worked only. You cannot change time once submitted without your reviewer/manager pushing back your entries, therefore, future time entries should not be entered.



Step	Action
5.	Enter the time in the **Time** field. Acceptable time is AM, PM or Military Time. Enter the desired information into the field. Enter "**8:30 AM**".

Step	Action
6.	Click the **Time Reporting Code (TRC)** dropdown button to activate the menu. The "Regular Time" TRC is defaulted. You will only see the TRCs applicable to your affiliation. If you are reporting time for another TRC, select the appropriate one**.** Refer to the Time Reporting Codes (TRCs) for Timesheet Submission by Affiliation (https://yulink-new.yorku.ca/documents/20182/89397/Time+Reporting+Codes+%28TRCs%29+for+Timesheet+Submission+by+Affiliation+%28XLS%29/3326d1a9-de2a-4644-a838-a7b1c8c4877d) to determine TRC meanings and when to use them. The system automatically calculates statutory holiday pay and vacation pay. If you do work on a statutory holiday, you need to enter that time with the appropriate TRC (Stat Hol Worked). **Note:** You will get a warning to ensure it is correct. For overtime worked, you punch time "In" and "Out". For shift premium TRCs, you enter the **Quantity** i.e. the number of hours the premium applies to for the day. **Note:** Any payments you may receive that are not in the system, must be submitted to payroll manually for payment e.g. Invigilation payments, tool and boot allowances, etc. Speak to your manager for this process. 
7.	Options are ***In, Meal, Out***. At a minimum, you must punch "In" and "Out" for each time code. For a typical 7- or 8-hour shift, you will generally have 4 punches per day – "In", "Meal", "In", and "Out". **Note:** You do not need to record breaks other than your meal break. If you don't have a meal break, you only punch "In" and "Out". If you have split shifts or multiple splits on the same day with unpaid time in between each, you must report time "In" and "Out" for each work period. The punch type Out button only appears when you have punched in. **Note:** Overlapping time periods are not allowed. If, for example, you finished a shift at 4:30 PM, and then started overtime directly after, enter 4:30:01 PM as the Overtime "In" entry.

Step	Action
8.	Click the **In** button. Once all punches have been completed for a TRC for a day, the time is sent to your reviewer for validation (if applicable) or directly to your manager for approval.
9.	All submitted hours for a given day appear in the **Submitted Hours** section. You may click on any line item to view full details.
10.	If you need to record time against another job code, and you do not have two job codes already set up in the system, you must select the ***Job Code*** associated with the job for which you wish to report time. Click the **Time Details** drop down arrow.
11.	Click the **Magnifying Glass** icon. All job codes associated with that salary admin plan will appear in the search. The new job will display your current rate of pay. Your reviewer and/or manager will be prompted to override the actual pay, if different from your current rate of pay. **Note:** Only the first 300 job codes will appear. Use the *Search Criteria* section and enter your job code or job title.
12.	**End of Procedure.**

1.3 Reporting Time on a Timesheet

There are two ways to report time. It is recommended that you use:

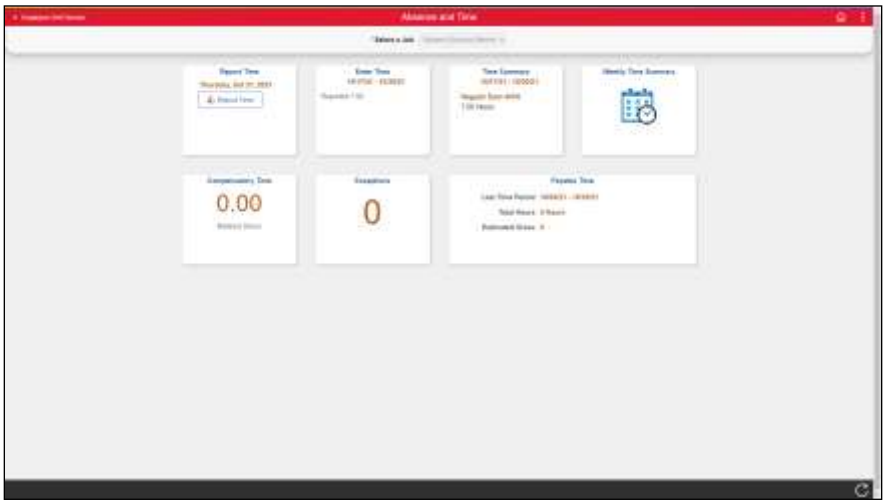
- **Report Time** on a **smartphone** or other **mobile device** and
- **Enter Time** on a **desktop** or **laptop**.

Learning Objectives:

In this tutorial, you will learn how to *Report Time* on **Enter Time** tile.

Procedure

Step	Action
1.	The enter times is a good mechanism to enter your time using a computer or to review time already submitted from your mobile device. To begin reporting time, click the **Absence and Time** tile.



Step	Action
2.	If you have two different jobs, you will be prompted to select the job for which you wish to report time before proceeding. Each job is administered separately. If you only have 1 job, you will proceed directly to the next step.

Step	Action
3.	Click the **Enter Time** tile. **Note:** Employees will lose access to this tile on the end of casual assignment date. Therefore, employees **must** report time *before* the end of day on that date.
4.	The enter time page appears and defaults to the current week. If you wish to select another week, click the **Previous Week** or **Next Week** arrows.
5.	**Note:** You can view the status of a Reported Time by clicking the **View Legend** link.
6.	Enter the time in the **In**, **Meal**, **In**, **Out** fields for the day. Acceptable time is AM, PM or Military Time. Click in the **In** field.

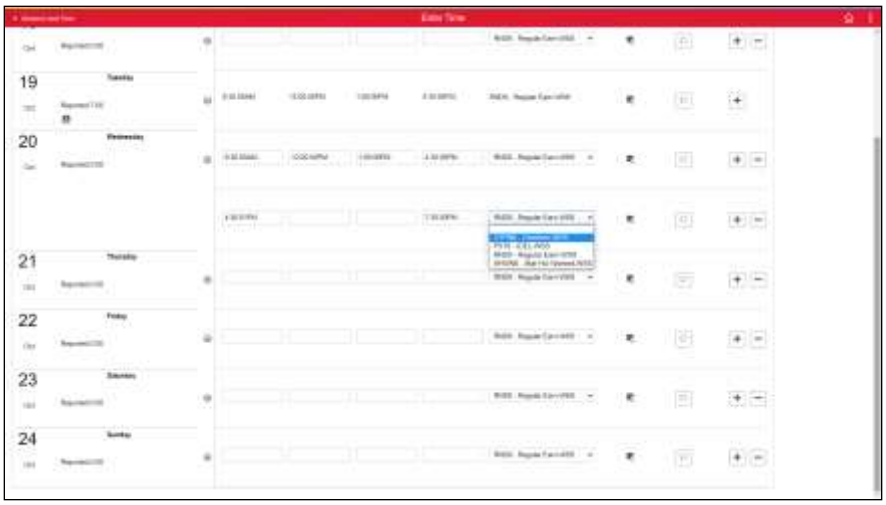
Step	Action
7.	Enter the desired information into the field. Enter "**8:30 AM**".

Step	Action
8.	At a minimum, you must punch "In" and "Out" for each time code. For a typical 7- or 8-hour shift, you will generally have 4 punches per day – “In”, “Meal”, “In”, and “Out”. Note: You do not need to record breaks other than your meal break. If you don’t have a meal break, you only punch "In" and "Out". If you have split shifts or multiple splits on the same day with unpaid time in between each, you must add a new row (+sign) and report an “In” and “Out” for each row. Enter the desired information into the field. Enter "**12:00 PM**".
9.	Enter the desired information into the field. Enter "**1:00 PM**".
10.	Enter the desired information into the field. Enter "**4:30 PM**".

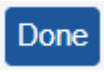
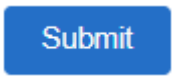
Step	Action
11.	You are now going to report your overtime. Click the **Plus Sign** button to add a new row. **Note:** If you started reporting time using the *Report Time* page (either using a computer or a mobile device), and wish to complete the entry you must add a new row (+sign) to complete the time reporting for that day.

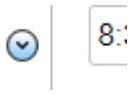
Step	Action
12.	A new blank row appears for the associated date. **Note:** Overlapping time periods are not allowed. If, for example, you worked until 4:30 PM, and then started an overtime shift at 4:30 PM, you must enter 4:30:01 PM in the **In** field. Enter the desired information into **In** the field.
13.	Enter the desired information into the **Out** field.

Step	Action
14.	Click the **Time Reporting Code (TRC)** dropdown button to activate the menu. RND6 - Regular Earn-WSS



Step	Action
15.	The "Regular Time" TRC is defaulted. You will only see the TRCs applicable to your affiliation. If you are reporting time for another TRC, select the appropriate one. Refer to the Time Reporting Codes (TRCs) for Timesheet Submission by Affiliation (https://yulink-new.yorku.ca/documents/20182/89397/Time+Reporting+Codes+%28TRCs%29+for+Timesheet+Submission+by+Affiliation+%28XLS%29/3326d1a9-de2a-4644-a838-a7b1c8c4877d) to determine TRC meanings and when to use them. The system automatically calculates statutory holiday pay and vacation pay. If you do work on a statutory holiday, you need to enter that time with the appropriate TRC (Stat Hol Worked). **Note:** you will get a warning to ensure it is correct. For overtime worked, you punch time "In" and "Out". For shift premium TRCs, you enter the ***Quantity*** i.e. the number of hours the premium applies to for the day **Note:** Any payments you may receive that are not in the system, must be submitted to payroll manually for payment e.g. Invigilation payments, tool and boot allowances, etc. Speak to your manager for this process. OTPN6 - Overtime-WSS
16.	Click on the **Add Comments** icon if you need to add any comments for either your reviewer and/or manager, related to the time reported only. **Note:** If you have a reviewer, and they modify any field, or if they add anything, the comment feature is automatically updated for audit purposes and available to view after submission. There is a different icon for manual comments versus system generated comments. You can view the details by clicking on the comment icon.

Step	Action
17.	**Note:** If you need to record time against another job code, and you do not have two job codes already set up in the system, you must add a new line and select the ***Job Code*** associated. Click the **Time Details** icon.
18.	All job codes associated with that salary admin plan will appear in the search. The new job will display your current rate of pay. Your reviewer and/or manager will be prompted to override the actual pay, if different from your current rate of pay. **Note:** Only the first 300 job codes will appear. Use the *Search by* field and use job code or description to search for the job title you need.
19.	Click the **Done** button to return to the enter time page. 
20.	Click the **Submit** button. The time is automatically sent to your reviewer for validation (if applicable), or directly to your manager for approval. 

Step	Action
21.	Click the **Relation Actions** icon to view the time summary or to view the payable time. 
22.	The Related Action shows... If you have made an error, please contact your reviewer and/or manager to push back your time so you can adjust and resubmit.
23.	**End of Procedure.**

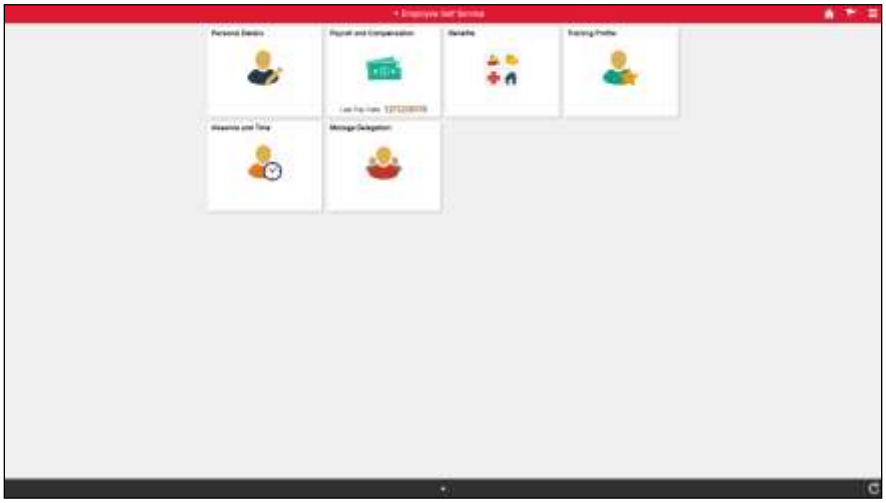
1.4 Editing Reported Time

If your reviewer and/or manager pushes back time, you will need to edit and resubmit.

Learning Objectives:

In this tutorial, you will learn how to **edit Entered Time**.

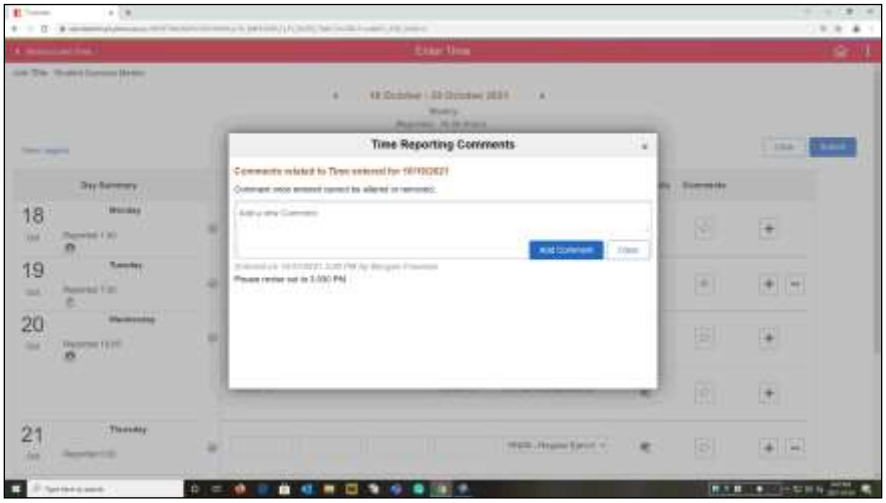
Procedure



Step	Action
1.	Should time you reported be pushed back (or denied), you are notified via email. To begin editing time, click the **Absence and Time** tile.

Step	Action
2.	Click the **Enter Time** tile.

Step	Action
3.	The enter time page appears and defaults to the current week. The **Hand icon** appears to indicate time has been "Pushed Back." You can only edit time that has been pushed back or denied. Contact your reviewer and/or manager if you need to make an adjustment for time that is listed as *Pending Approvals*.
4.	You can select another week by clicking on the **Left** or **Right** arrows.
5.	Click the **Comments** button associated with "Pushed Back" status. **Note:** If the reviewer and/or manager included comments for the pushed back time, all entries for that day will show the same comment, even though it only applies to the pushed back time.



Step	Action
6.	Review the comments associated with the entry. Click the **X** button to return to the previous screen. ✕
7.	Click in the field for the time you wish to modify. 4:30:00PM
8.	Enter the desired information into the field. Enter "**3**".
9.	If you need to delete an entry, scroll to the right of the screen, and click the **Delete (-)** button. **Note:** Pushed back time must be changed to resubmit. If after a discussion with your reviewer/manager, you need to resubmit time with no changes, you will need to delete the row, submit the deletion, and re-enter and resubmit the time.
10.	Once you have revised the timesheet, you will need to resubmit it for approval. **Note:** Any retroactive adjustments should be discussed with your reviewer/manager to obtain guidance on how to resolve. Only your manager can fix time already paid (status of Closed). Click the **Submit** button. Submit
11.	You will receive a confirmation of your submission.

Step	Action
12.	**End of Procedure.**

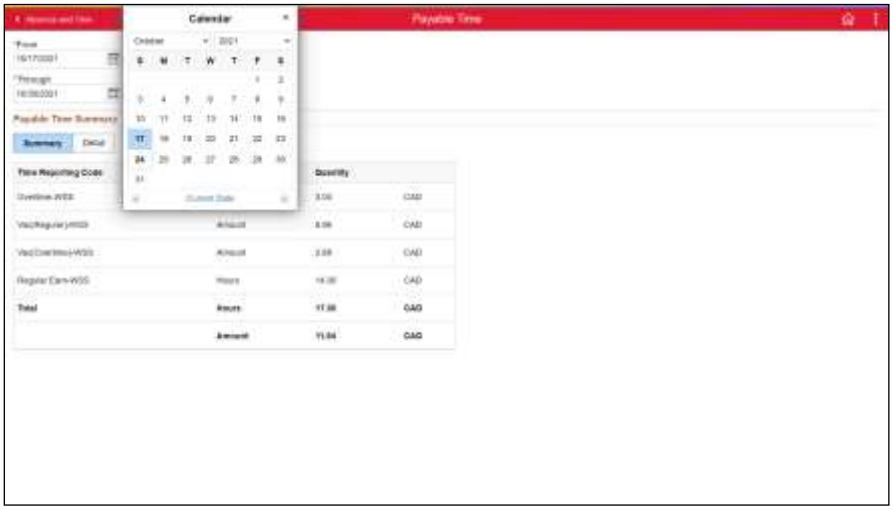
2. Viewing Time

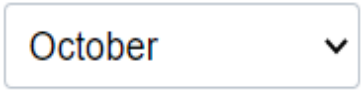
2.1 Viewing a Summary of Payable Time

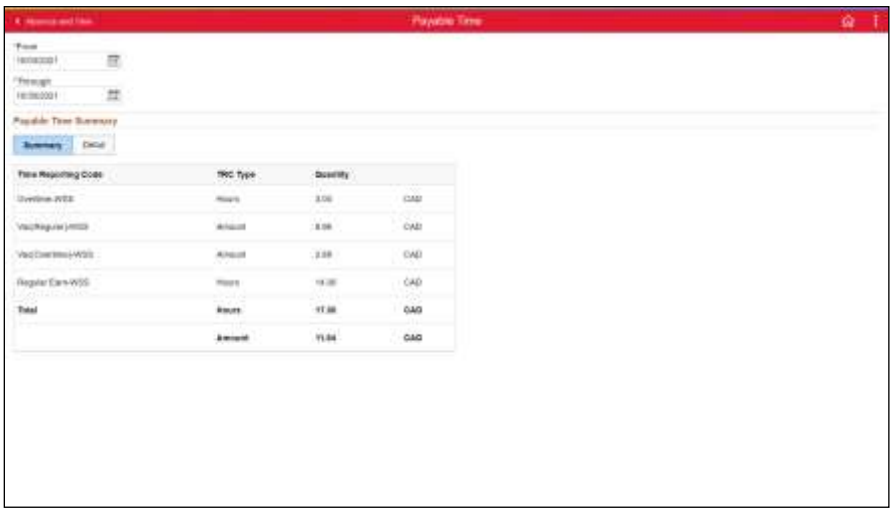
In this tutorial, you will learn how to view **Payable Time** for a specific time period.

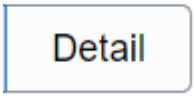
Procedure

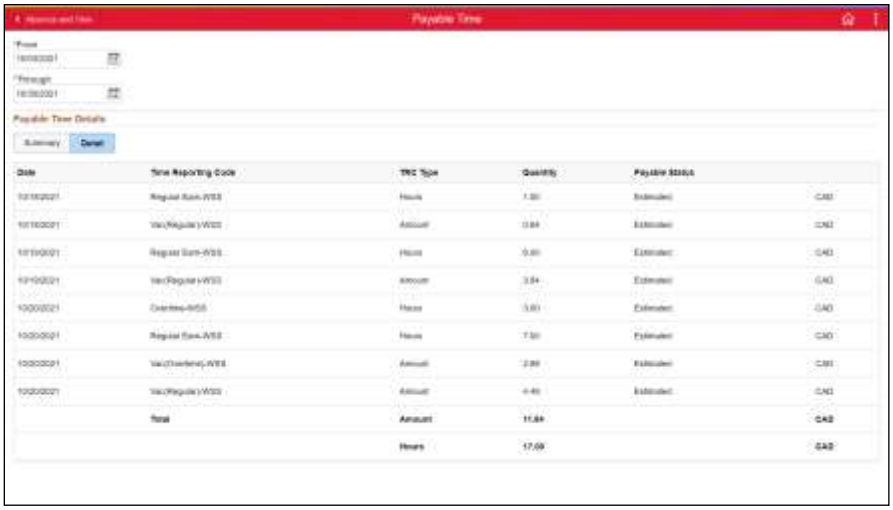
Step	Action
1.	Click the **Absence and Time** tile.
2.	Click the **Payable Time** tile.
3.	The *Payable Time* page appears. Depending on what you would like to view, you may need to change the time period. Click the **Calendar** icon in the *From* field.



Step	Action
4.	Click the dropdown button to activate the **Month** menu and select the desired month. 
5.	Click the desired **Date** button.
6.	**Note:** You can also specify an end date by selecting a date in the ***Through** field.



Step	Action
7.	The page refreshes and the summary of *Payable Time* for your selected date range appears. This page displays the total time for each *Time Reporting Code* for the time period you specified and will show an amount of hours in the **Quantity** column. **Note:** The calculated vacation amount is based on either 4% or 6% of earnings as per your Collective Agreement or the Employment Standards Act of Ontario.
8.	***Hours*** are the total hours to be paid, and ***Amount*** is the total dollar amount for calculated vacation and/or premiums.
9.	The ***Detail*** tab provides a more detailed report of each *Time Reporting Code* by day and payable status. Click the **Detail** tab. 



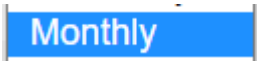
Step	Action
10.	In the ***Payable Status*** column: *Estimated* means the time is approved and awaiting payment on the current pay cycle. *Closed* means it has been already processed for payment.
11.	**End of Procedure.**

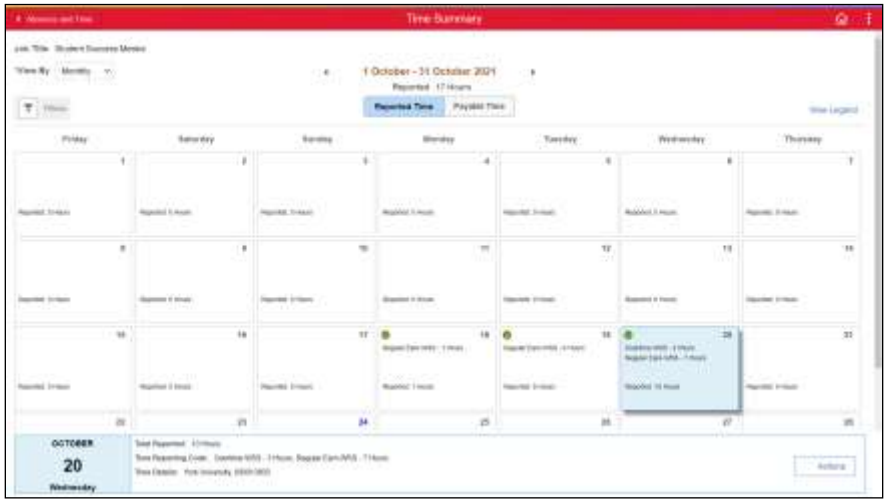
2.2 Viewing Time Summary

In this tutorial, you will learn how to view a summary of the time reported for a month. This is done using the **Time Summary** page. From this page, you can view the:

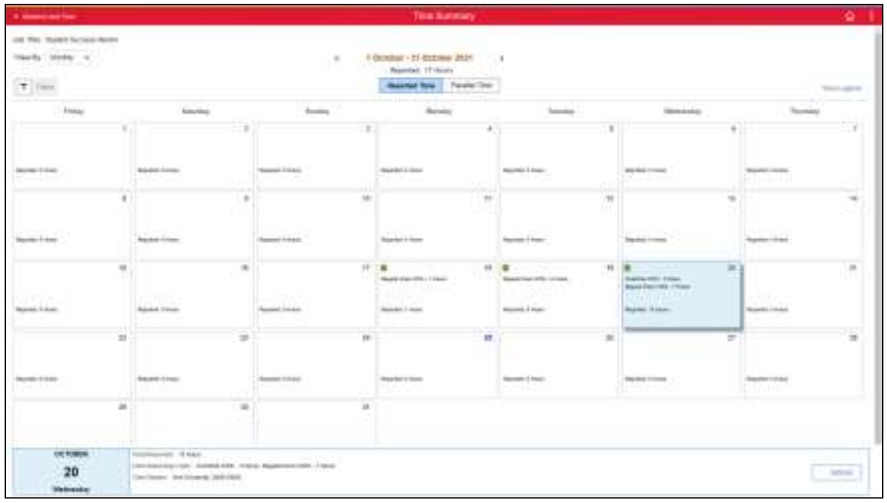
- number of hours reported,
- time reporting code, and
- details for one specific day.

Procedure

Step	Action
1.	Click the **Absence and Time** tile.
2.	Click the **Time Summary** tile. **Note:** This tile displays all approved total time, by Time Reporting Code, for the date range indicated.
3.	The **Time Summary** page appears and defaults to the current week. Click the View By to change to bi-weekly, monthly, pay period or weekly. Click the **Monthly** list item. 

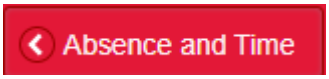


Step	Action
4.	The page refreshes and loads the data for the selected month.
5.	To view full details for a specific day, click the **Date** link. Click **20**.



Step	Action
6.	The **details** for that day appear at the bottom of the page. Time goes through several steps, and depending upon the outcome of the step, you may see one or more of the following: **Total Reported** - the total number of hours that you report for the day. **Time Reporting Code** - the time reporting code used for any shift or other premiums. **Exception -** a potential error generated when the nightly process runs. If the exception is indeed an error, the time may not be paid. Reviewers and managers are responsible to resolve any errors, as needed (Not shown). In this scenario, the employee reported 3 hours of overtime and 7 hours of regular time, for a total of *10*.

Step	Action
7.	In the **Payable Time** section, a summary of hours already approved or ready for processing is shown. The *Payable Status* is also shown at the bottom of the page. ***Estimated*** means the time is approved and awaiting payment on the current pay cycle. ***Closed*** means it has already been processed for payment. In this scenario, the 3 hours of overtime & the 7 hours of regular time have been approved and are awating processing for payment. Also, the vacation amounts have been calculated on the overtime and regular hours, and they are also awaiting processing for payment in the amount shown.

Step	Action
8.	Click the **Absence and Time** link to return to the previous page. 
9.	**End of Procedure.**

2.3 Viewing Weekly Time Summary

In this tutorial, you will learn how to view a summary of the time reported for a week.

This is done using the **Weekly Time Summary** page. From this page, you can view the:

- details of the daily punches,
- reported time status, and
- details for one specific day.

Procedure

Step	Action
1.	Click the **Absence and Time** tile.
2.	Click the **Weekly Time Summary** tile.
3.	The **Weekly Time Summary** appears and defaults to the current week. If you wish to select another week, click on the **Left** or **Right** arrows. Click the **Left Arrow**
4.	The weekly time page appears and shows the daily punches (in, out & meal time) and the status for the selected week. To view full details for a specific day, click the **Date** link.

Step	Action
5.	The **Reported Time** page for the selected date appears and shows the Punch Type and the Time Reporting Code. In this scenario, the employee punched in at 8:30 am, and punched meal at 12 pm, so the total submitted is *10 hours*. The job code, job rate and the combination code will show in the **Time Details** section. Click the **Time Details** arrow.

Step	Action
6.	The *Time Details* section appears. Note: Contact your reviewer and/or manager If you need to record time against another job code.
7.	Click the **Weekly Time** link to return to the previous page.
8.	**End of Procedure.**

Time Reporting Tool (TRT) for Reviewers

1.1 Validating Casual Time

A reviewer is responsible for validating time entry by an employee, prior to managerial approval.

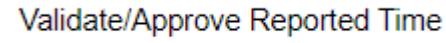
During this process, reviewers can correct time on behalf of an employee, in cases the employee is not able to, or when a push back is not practical e.g. the employee is no longer active in the assignment or it is too close to the payroll submission deadline. Employees can add time, if an entry was missed, up to 21 days prior to the start of the period. As a reviewer, you have up to 60 days to add time.

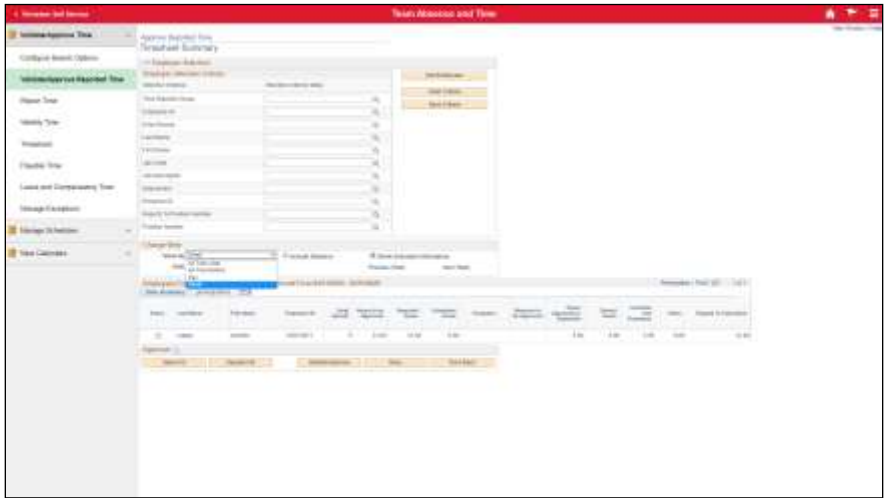
Note: Corrections to ***validated*** time must be made by the manager.

Learning Objectives:

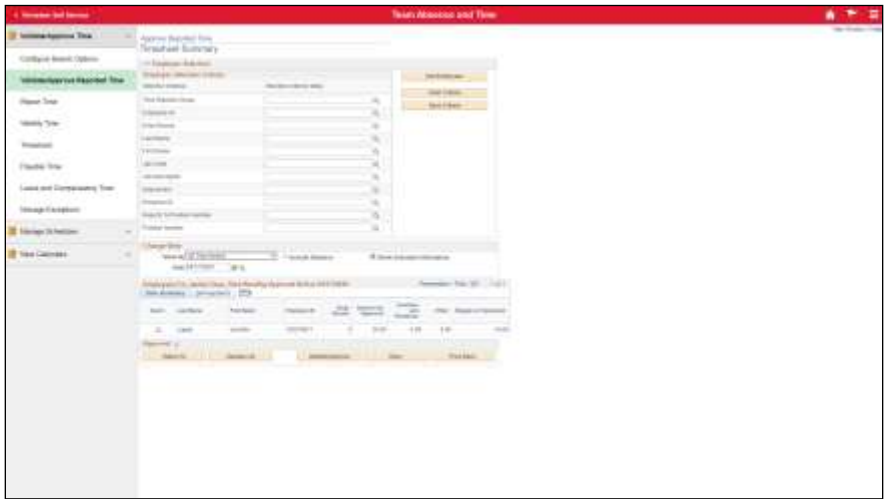
In this tutorial, you will learn how to **Validate Time** for an employee.

Procedure

Step	Action
1.	Ensure you are in the **Reviewer Self Service** menu. **Note:** At any time, you can use this menu bar to switch to *Employee Self Service*.
2.	Click the **Team Absence and Time** tile.
3.	Click the **Validate/Approve Reported Time** link. 
4.	Click the **Get Employees** button.
5.	Click the arrow to the right of the **View By** field in the **Change View** section.

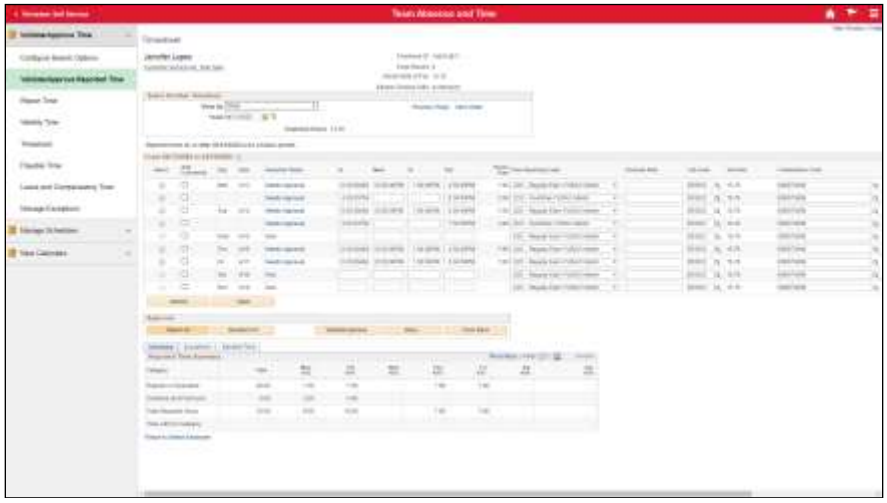


Step	Action
6.	Click **All Time Before** in the list. This is the recommended setting to ensure you return all time needing validation, including previous pay periods. All Time Before



Step	Action
7.	The date defaults to today's date. To include time reported on current date, select tomorrow's date. Click the **Calendar Picker** button.

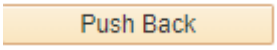
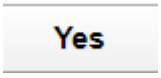
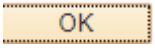
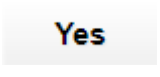
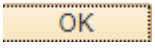
Step	Action
8.	Click the **Date** link.
9.	Click the **Refresh Summary Page** icon.
10.	All employees with time submitted will appear in the **Employees For…** section in the **Time Summary** tab. Each job an employee has is represented by an employment record number displayed in the Empl Record column. The ***Hours to be Approved*** column displays the total number of hours still outstanding validation for each employment record. This total will include the current pay period hours submitted, and any prior pay period hours submitted but not yet approved. **Caution:** Pushing back or Denying time at this summary level will cause errors for all reported time for that employee in that period.
11.	The next 3 columns - ***Overtime and Premiums***, ***Other*** and ***Regular or Equivalent*** – display the summary total hours by each category for information purposes.
12.	The **Demographics** tab displays more information for each job record, including the Job Code, and Reviewer ID. Your employee ID will be listed as the Reviewer ID, unless you are validating time for another reviewer. Click the **Show all Columns** icon to merge the information in both the *Time Summary* and *Demographics* tab into one combined view. **Note:** Any of the values displayed in the columns can be used in the selection criteria value field above.
13.	Although you can select an employee and validate time from this page, doing this will validate all outstanding time for this employee. In order to identify the specific validation request by date and type, click the name link for a given employee. **Caution:** Pushing back or Denying time at this summary level will cause errors for all reported time for that period of the employee. To validate time, click the **Last Name** link of the employee.

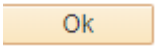
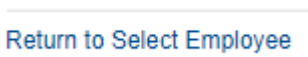


Step	Action
14.	The earliest timesheet with unvalidated hours appears for that employee. Review the **Reported Status** column for any time rows that display “Needs Approval”. This indicates time awaiting validation. A status of “Pushed Back” indicates time that was pushed back by the manager to the employee for review/action. As a reviewer, you can action this time as well. The originator of the transaction (i.e. employee or reviewer) will receive an email notification when time is pushed back.
15.	If you push back any time to the employee, let them know why by using the "Comments" icon. If you modify any field submitted by the employee, or if you add any time rows using the add button (+ sign), comments are automatically updated for audit purposes and available to view after submission by both the employee and the manager. There is a different icon for system generated comments. Click the **Add Comments** icon.

Step	Action
16.	Enter the desired information into the field. Enter "**Please revise out to 3:30 PM**".

Step	Action
17.	Click the **OK** button. OK
18.	Note that the **Comments** icon changes to indicate there is a comment associated with this row.

Step	Action
19.	In the **Select** column, individually select the checkbox associated with the row you wish to validate, deny, or push back. **Note:** You may also use the **Select All** button below to auto-select all time awaiting validation. Click the **Select** option.
20.	Click the **Push Back** button. 
21.	A confirmation window appears to confirm you wish to push back the time selected. Click the **Yes** button. 
22.	Click the **OK** button. 
23.	Click the **Select** option for the remaining time you wish to validate.
24.	Click the **Validate/Approve** button. **Note:** Although this button lists approval as well, at this point you are simply validating the time, and it is then sent to the manager for approval. **Note:** If you make any changes to the timesheet, e.g. correcting time yourself rather than pushing back to the employee to correct, you need to click the **Submit** button, before you can click the **Validate/Approve** button.
25.	A confirmation window appears to confirm you wish to push back the time selected. Click the **Yes** button. 
26.	Click the **OK** button. 

Step	Action
27.	Click the **Next Week** link to find all time to validate and continue to validate time. If you have more employees that require time validation, click the **Next Employee** link to get to the next employee who has outstanding unvalidated time and continue to click "Next Week" until all hours have been validated.
28.	If the employee is working another job, and there are not two job codes already set up in the system, employees are instructed to add a new line and select the **Job Code** associated by clicking the **Magnifying Glass** icon. All job codes associated with that salary admin plan will appear in the search. The new job will display the current rate of pay. Reviewers must override the actual pay before validating the time, by entering the rate in the **Override Rate** field, *even if it is the same rate as the current job rate*. Failure to do so will prompt an error message. You would then click the **Submit** button, followed by the **Validate/Approve Time** button. If this is an overtime transaction, use the regular rate of pay, as the system will automatically calculate the overtime rate for all overtime transactions. Never enter the overtime rate of pay in the override rate.
29.	If you need to change the accounting information for a particular transaction, click the **ChartFields** link.
30.	The *ChartField Detail* page appears. Enter the appropriate information and click the **OK** button to override the default accounting information. If there is time split between any element of the *ChartFields*, for example, between two different activities, each time entry must be entered separately as different time. **Note:** The Combination Code will be updated automatically after clicking OK. 
31.	To ensure all time has been validated, we recommend going back to the search page. Click the **Return to Select Employee** link. 
32.	Click the **Refresh** object.
33.	Ensure that the *Hours to be Approved* is "0". If not, continue validating until it is.

Step	Action
34.	**End of Procedure.**

1.2 Reporting Time On Behalf of an Employee

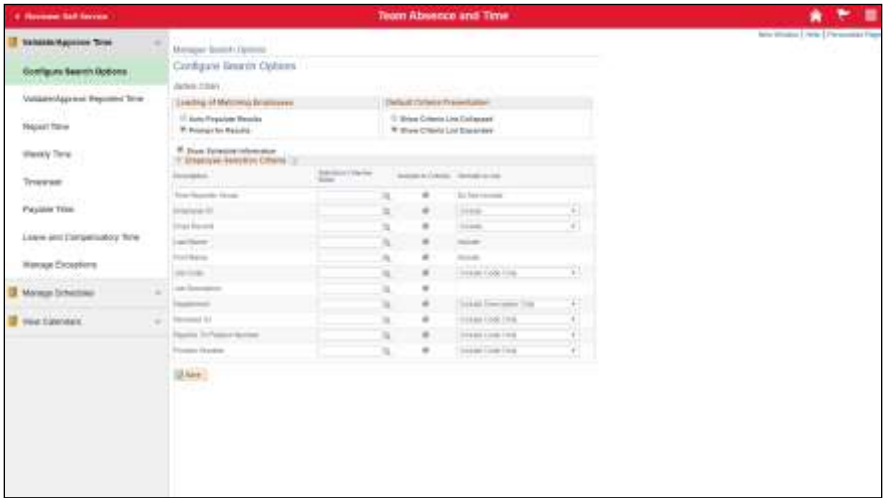
Learning Objectives:

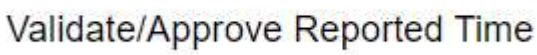
In this tutorial, you will learn how to:

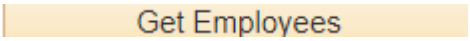
- report time on behalf of an employee, and
- validate the new reported time.

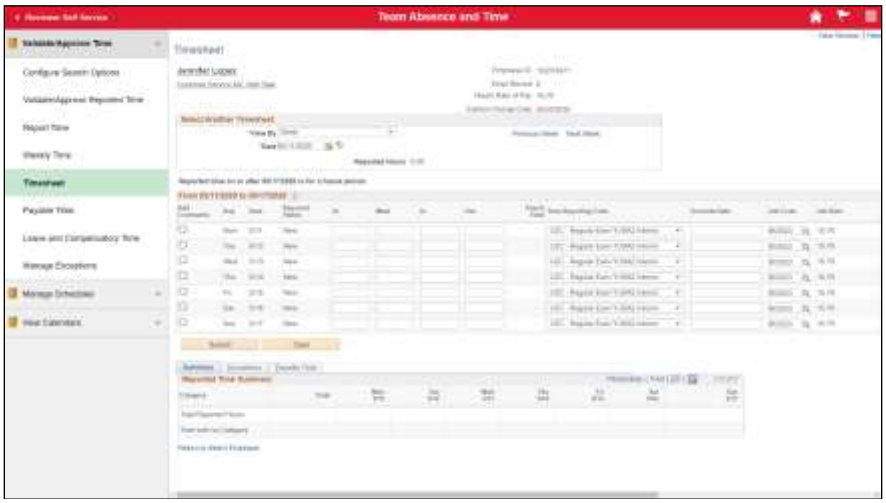
Procedure

Step	Action
1.	Click the **Team Absence and Time** tile.

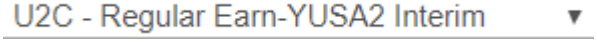


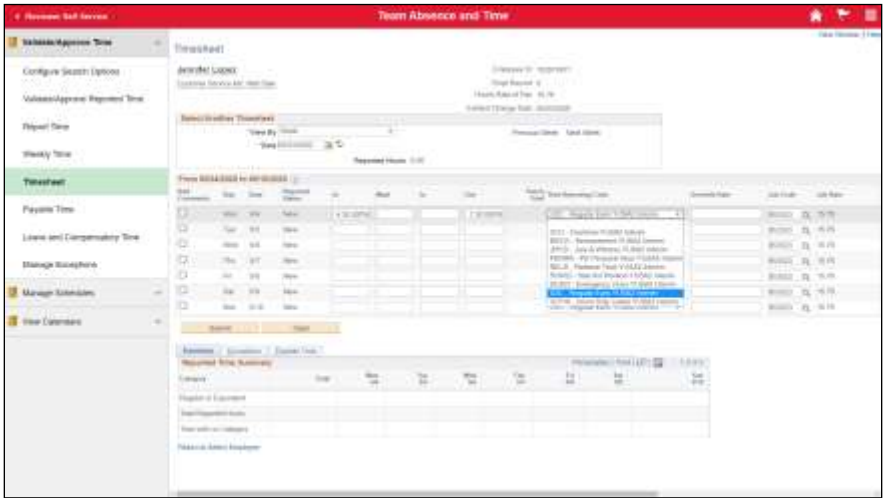
Step	Action
2.	Click the **Validate/Approve Reported Time** link. 

Step	Action
3.	Click the **Timesheet** link.
4.	By default, the **Employee Selection Criteria** is blank, and will return all employees for which you have time validation responsibility when you click "Get Employees." Should you wish, you may add search criteria to refine your employee search. Click the **Get Employees** button. 
5.	Click the **Last Name** link for the appropriate employee.

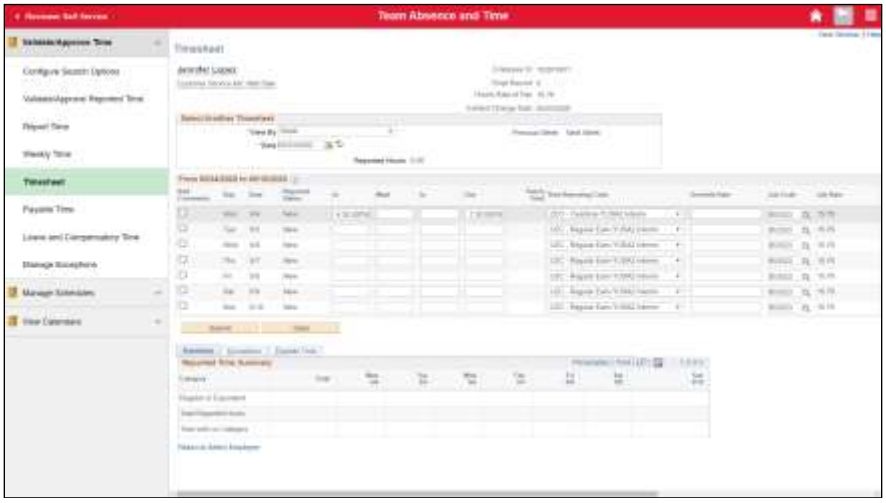


Step	Action
6.	The *Timesheet* defaults to the current date. You wish to report time for the week of May 4. Click the **Calendar** button.

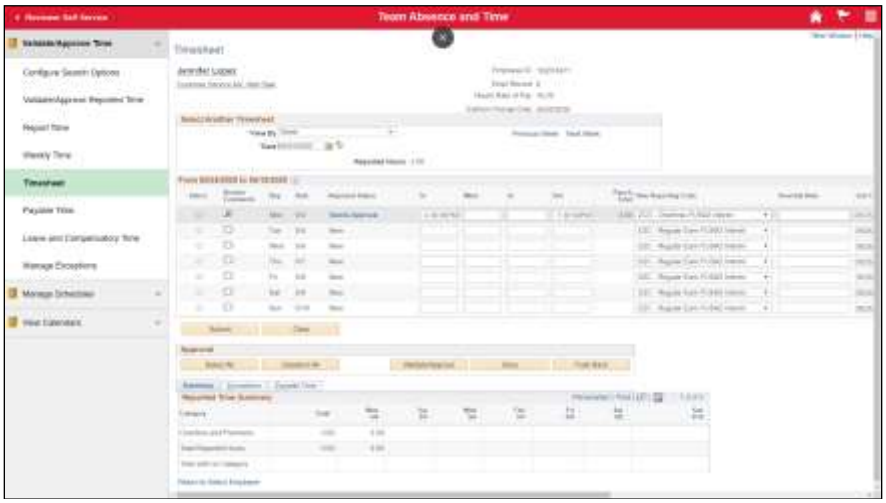
Step	Action
7.	Use the **Month** dropdown list if you need to change the month, then select the desired date. Click the **Date** to select the date you wish to view. 4
8.	To retrieve the weekly timesheet, refresh the page. Click the **Refresh** button.
9.	**Note:** Employees who work on Saturdays or Sundays can change the **View By** option to “Calendar Period” instead of “Week”. This will show the entire time reporting period, starting on the Sunday of the start of the pay period, up to the current date. Also, the *Reported Time Summary* is organized by week.
10.	At a minimum, you must punch the employee "In" and "Out" for each time code. For a typical 7- or 8-hour shift, you will generally have 4 punches per day – “In”, “Meal”, “In”, and “Out”. Note: You do not need to record breaks other than their meal break. If there is no meal break, you only punch "In" and "Out". If the employee has split shifts or multiple splits on the same day with unpaid time in between each, you must add a new row (+sign) and report an “In” and “Out” for each row. **Note:** Overlapping time periods are not allowed. For example, if the regular punch out time is 4pm, and the employee starts working overtime at 4pm, enter **4:00:01 PM** in the “In” field of the overtime row. In this scenario, on May 4, this employee worked 3 hours of overtime, from 4:30 PM to 7:30 PM. Enter the time in the appropriate **In**, **Meal, In** and/or **Out** fields.
11.	Click the **Time Reporting Code** list. 

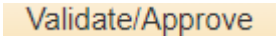
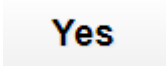


Step	Action
12.	The “Regular Time” TRC is defaulted. You will only see the TRCs applicable to that employee's affiliation. If you are reporting time for another TRC, select the appropriate one. Refer to the Time Reporting Codes (TRCs) for Timesheet Submission by Affiliation to determine TRC meanings and when to use them. The system automatically calculates statutory holiday pay and vacation pay. If the employee does work on a statutory holiday, you need to enter that time with the appropriate TRC (Stat Hol Worked). **Note:** you will get a warning to ensure it is correct. For overtime worked, you punch time "In" and "Out". For shift premium TRCs, you enter the ***Quantity*** i.e. the number of hours the premium applies to for the day Click the appropriate TRC. 2CO - Overtime-YUSA2 Interim



Step	Action
13.	Click the **Submit** button.
14.	Click the **OK** button.
15.	Note that the **Review Comments** icon is automatically updated. This is for audit purposes and displays to both the employee and manager.



Step	Action
16.	After you submit time, you then need to validate the time before it is submitted to the manager for approval. Click the **Select** option associated with the time you wish to validate.
17.	Click the **Validate/Approve** button. 
18.	Click the **Yes** button. 
19.	Click the **OK** button.
20.	**Note:** If the manager pushes back this time, the email generated for the pushback will not link you to the employee's timesheet directly. Therefore, locate the employee ID and the date of the time submitted in the text of the hyperlink, and then navigate to that timesheet to action the pushed back time.
21.	**End of Procedure.**

1.3 Reviewing Exceptions (Time Reporting Errors)

Learning Objectives:

In this tutorial, you will learn how to determine if timesheets have "exceptions". An **Exception** is the system's warning that there may be a time reporting error. Reviewers should review any exceptions as they occur so any necessary corrections can be flagged to the manager for action. In some cases, an exception is a flag rather than an error and may be *allowed*.

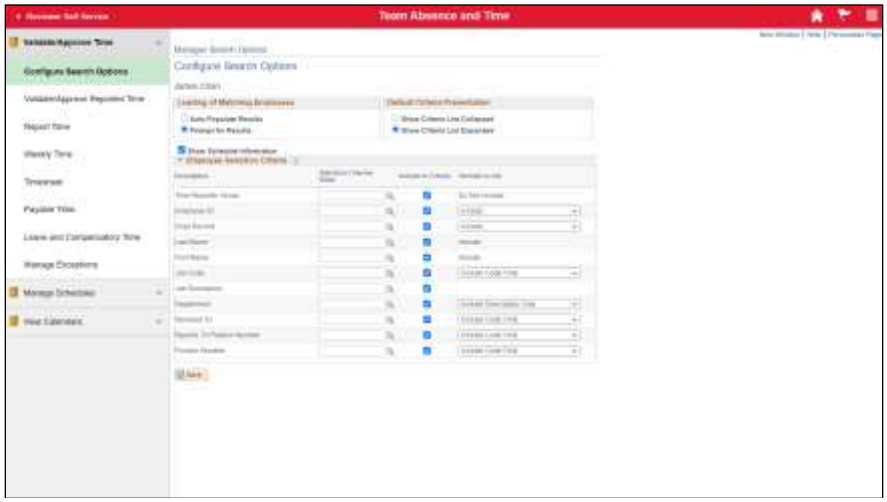
Note: Exceptions will only appear after transactions have been approved by managers and processed by the system.

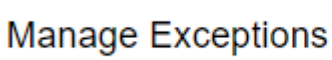
There are two methods to locate exceptions:

1. Using the **Manage Exceptions** page, and
2. Reviewing employee **Timesheets**.

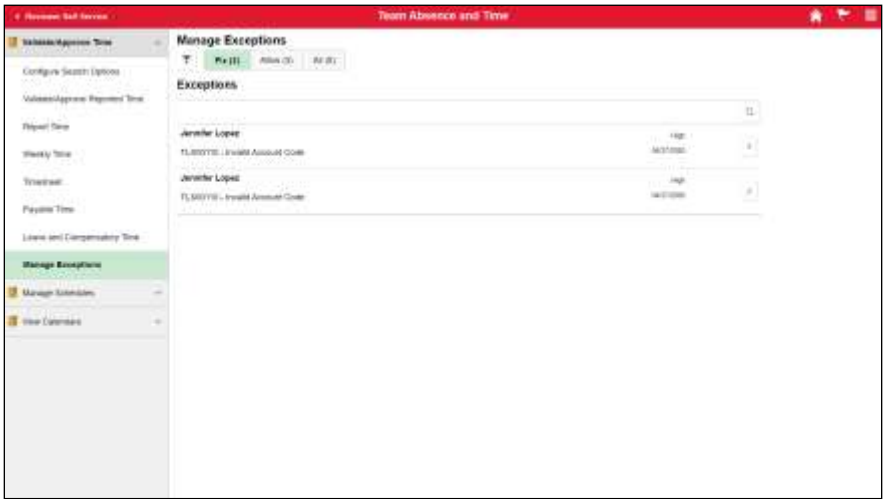
Procedure

Step	Action
1.	Click the **Team Absence and Time** tile.



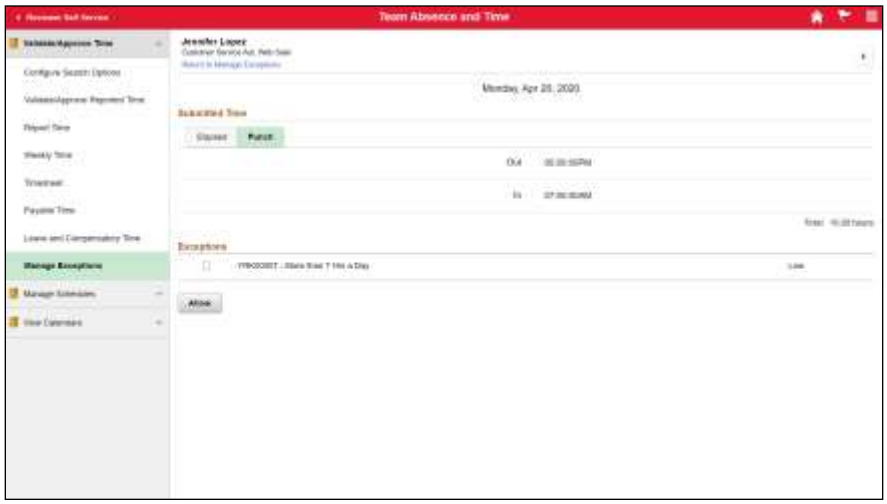
Step	Action
2.	Click the **Manage Exceptions** link. 
3.	The Manage Exceptions page appears and shows any outstanding exceptions that require review. The page is organized into 3 tabs. The **Fix** tab shows ***High*** Exceptions; these require fixing in order to be paid. For example, an invalid account code was entered by the reviewer or manager.

Step	Action
4.	The **Allow** tab shows ***Low*** Exceptions; these are warnings and may be either corrected or allowed. For example, YUSA2 employees cannot work more than 35 hours per week or 7 hours in a day. If they report more than this, and it is validated, approved, and processed, the system will generate a low exception. However, if they report 7 hours regular time plus 1-hour overtime, while the system would create an exception, you can allow this if they indeed worked the overtime. **Note:** Low severity exceptions are warnings only. If not revised, they will be submitted, approved, and paid, as is.

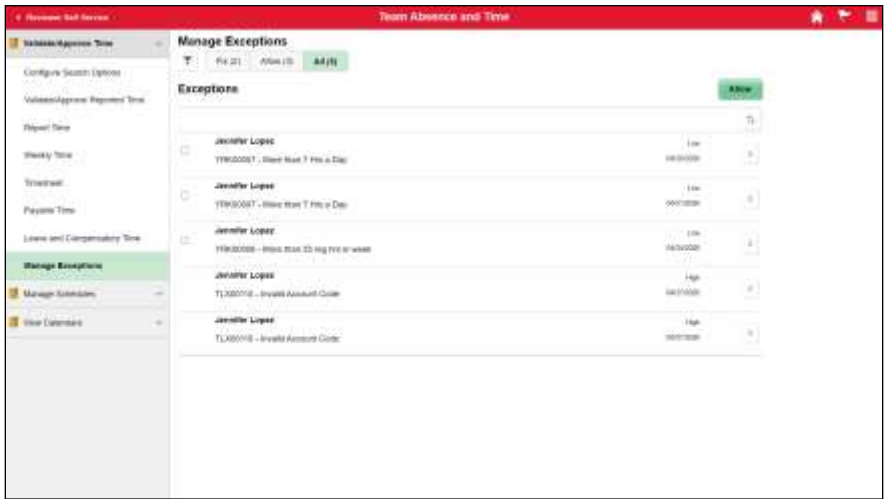


Step	Action
5.	The **All** tab shows all ***Low*** and ***High*** severity exceptions. Click the **All** tab.
6.	The full list of exceptions appears. Reviewers can allow ***low*** exceptions only. Refer to the Time Reporting Tool (TRT) Exceptions spreadsheet for a full list of potential exceptions, what they mean, and how to resolve them. **Important!** It is the role of the reviewer to identify all exceptions, allow those that are not errors, and flag those that need correction with the manager, in advance of the payroll submission deadline. Failure to do so may result in the employee not getting paid correctly.

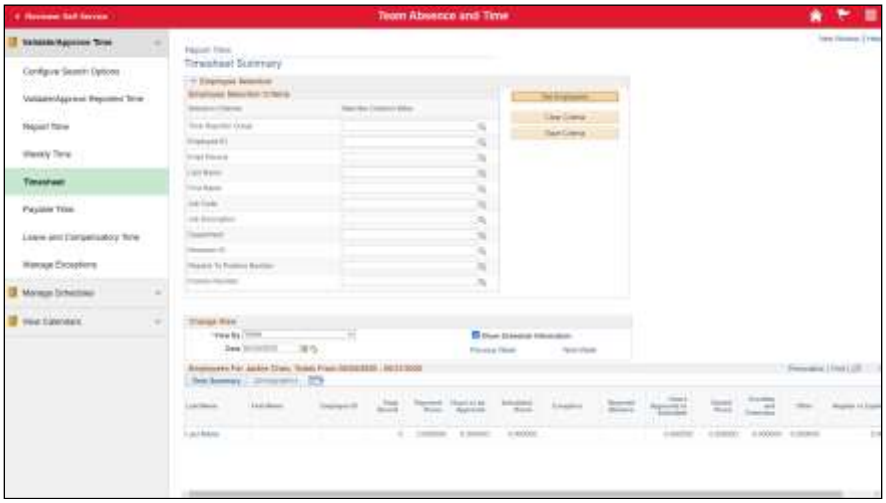
Step	Action
7.	Click on the arrow associated with the exception.



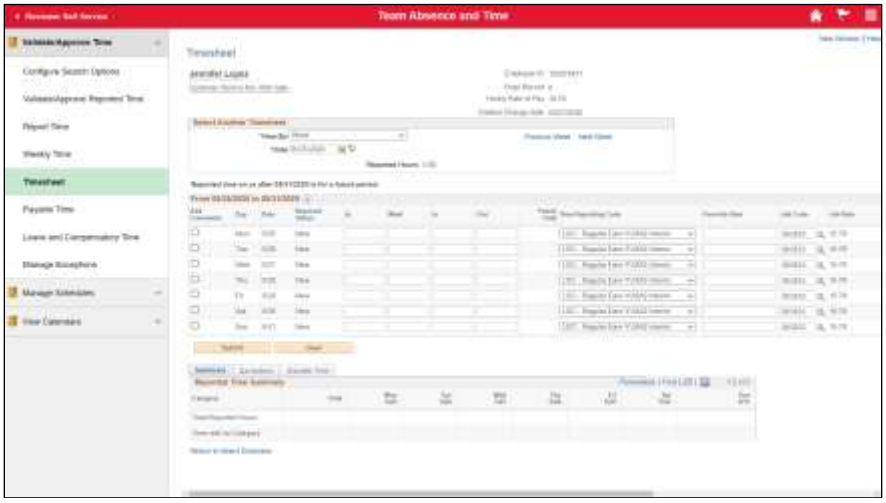
Step	Action
8.	The date of the exception appears along with the details of the submitted time. Click the **Return to Manage Exceptions** link to return to the previous page. Return to Manage Exceptions



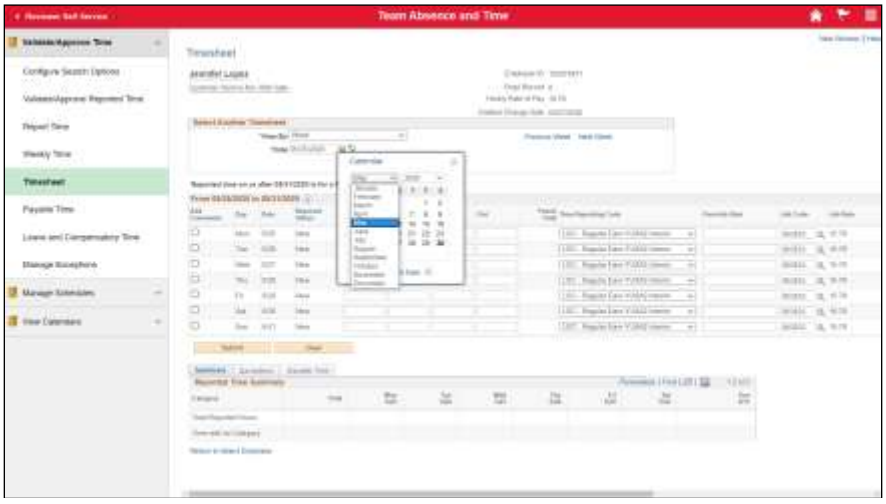
Step	Action
9.	To review the timesheet with exceptions, take note of the employee and the date of the exception, and navigate to the timesheet for that date. Click the **Timesheet** link. Timesheet



Step	Action
10.	Click the **Get Employees** button. Get Employees
11.	Click the **Last Name** link. Lopez

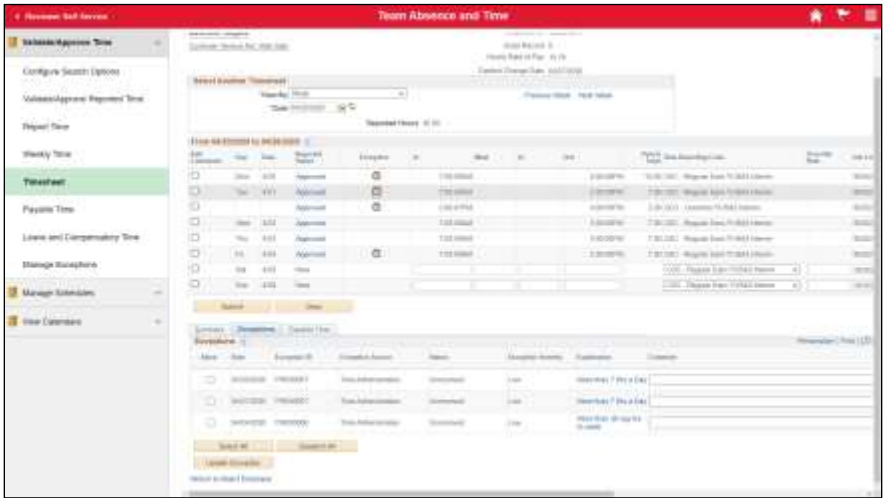


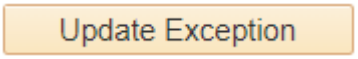
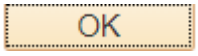
Step	Action
12.	The Timesheet defaults to the *current* week. Change the date to locate the timesheet with exceptions. Click the **Calendar** button.
13.	Click the **Month** list.



Step	Action
14.	Select the month you wish to view.

Step	Action
15.	Select the date you wish to view. 20
16.	Once the date is selected, you will need to refresh the page. Click the **Refresh** button.
17.	In the **Exception** column, an icon will appear if a timesheet has an exception. Click the **Exception** graphic.
18.	The **Exceptions** Tab at the bottom of the page appears, along with detailed information about the exception. •To resolve a ***low*** exception that is not an error, the reviewer can allow the exception. •To resolve a low exception that is indeed an error, contact the manager and advise what needs correction. •To resolve a high exception, contact the manager and advise what needs correction. **Note:** Corrections must be done prior to the payroll submission deadline for the employee to be paid correctly. For corrections done after the deadline, the system will recalculate the adjustment correctly, and the employee will be paid this adjustment on the next pay.



Step	Action
19.	Click the **Allow Checkbox** associated with exception you wish to allow.
20.	Click the **Update Exception** button. 
21.	Click the **OK** button. 
22.	The **Exception** icon in the *Exception* column disappears, and the **Status** in the *Exceptions* section displays as "Allowed".
23.	As you review the next exception, you notice that the Punch Total on April 20 is 10 hours. Since you know the employee should have recorded overtime if they worked more than 7 hours in a day, this is indeed an error, and you need to alert the manager to correct it. You should also notify the employee of the error, so they know how to enter time correctly in the future. Continue to review exceptions and notify the manager of any low exceptions you cannot allow and any high exceptions.
24.	**End of Procedure.**

1.4 Accepting and Reviewing Delegation Requests

If a reviewer will not be available to validate time entries prior to the end of the current pay period, a proxy must be assigned (the time validation function must be delegated to someone else), so that the employees' time can be sent to the manager for approval prior to the payroll deadline.

A "proxy" is an individual who has agreed to act on behalf of another individual as a Reviewer.

A proxy must be another position-based employee, or the manager.

Learning Objectives:

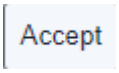
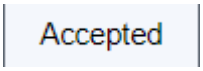
In this tutorial, you will learn how to:

- Review a request to act on behalf of an individual as a Reviewer; and
- Accept the delegation.

Procedure

Step	Action
1.	Once the delegation has been assigned by the manager, you (the proxy) will receive an email notification for this delegation. As a proxy, you must accept the invitation to activate the delegation. **Note:** You can click the link in the email to accept the delegation. You will be prompted to log into **HR Self Serve** then the *Delegations* tile will appear.

Step	Action
2.	Alternatively, you can navigate from ***Employee Self Service.*** Click the **Delegations** tile.
3.	Click the **My Delegated Authorities** tile

Step	Action
4.	The *My Delegated Authorities* page appears. The manager has delegated the following transaction: - Manage Delegation for Reviewer This means the manager is delegating to you the ability to validate time entries and enter/modify time on behalf of the casual employee, if required. **Note:** There is no end date for this delegation. Click the **checkbox** option.
5.	Click the **Accept** button. 
6.	Click the **Yes** button.
7.	Once the delegation has been accepted, click the **Delegations** button to return to the previous screen. **Note:** An email notification will be sent to the delegator advising them of your acceptance.
8.	At any time, you can confirm what transactions are delegated to you. Click the **My Delegated Authorities** tile.
9.	To review the delegations that are accepted, click the **Accepted** link. Alternatively, you can click on the **Active** link. 
10.	The list of Accepted Delegations appears. The most recent delegation will be at the top of the list. In this scenario, the November 5 delegation appears.
11.	**End of Procedure.**

Introduction to Manager Self Service

1. Overview and Navigation

1.1 Navigating Manager Self Service

Learning Objectives:

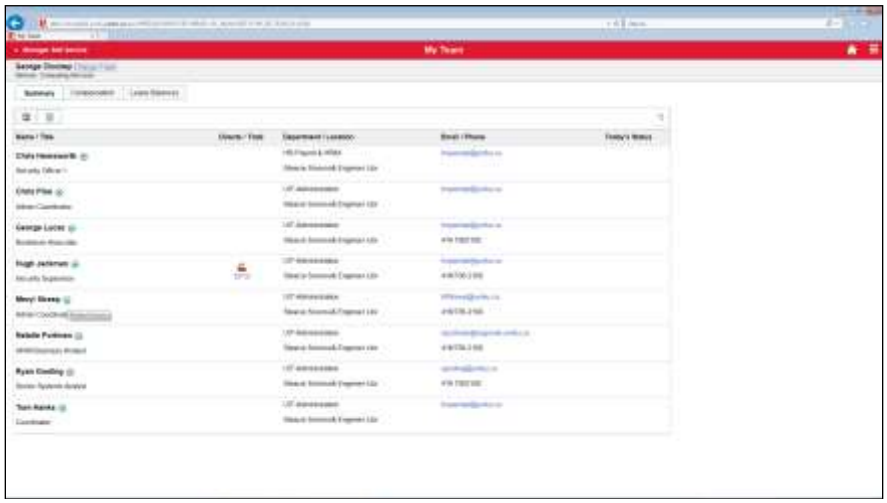
In this tutorial, you will:
- become familiar with basic navigation elements in Self Service such as Pages and Buttons,
- navigate to different Pages and return to the Home Page, and
- know how to Sign Out.

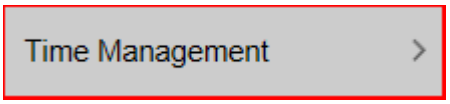
Procedure

Step	Action
1.	Access to Manager Self Service in the Peoplesoft is based on a user interface called **Fluid**. This **Fluid** interface is similar on desktops, laptops, and mobile devices. The **Fluid** interface has: **Pages**, which are a collection of elements, such as this landing page, and **Menus** that allow you to select an action or new page. The **Pages** and **Menus** that you have access to will depend upon your role at York.
2.	The **Fluid** interface uses **Pages** to organize content. A **Page** has several elements: **Page Name,** such as **Employee Self Service** **Buttons,** such as **Home**, and **Tiles,** such as **Training Profile** that navigate to a new page. The **Page Name** appears in the header. If you have access to several pages, selecting the **Page Name** will provide a drop-down menu of other pages. **Buttons** appear in the upper right-hand corner of the page. **Buttons** always include: **Home**, **Notifications**, and the **Action List**. **Tiles** appear in the main area of the **Page**. The **Tiles** navigate to **Subpages**.

Step	Action
3.	The **Page Name** appears in the top header. In this example, the **Page Name** is **Employee Self Service.** Selecting the **Page Name** will provide a list of pages available to you. Open the list of pages and navigate to **Manager Self Service**
4.	A menu of Pages appears. Click the **Manager Self Service** link.
5.	Note that the page name changes to **Manager Self Service** and a new set of tiles is available. **Buttons:** Several buttons appear in the upper right-hand corner of a page. Regardless of where you are in Manager Self Service, the **Home** button will always take you to your **Home Page.**
6.	**Buttons:** The **Actions List** button will display a menu of available actions.

Step	Action
7.	**Tiles** are used to organize content. They appear in the middle of a page. Some **tiles** have active information. In this screen, the number of pending absence approvals (i.e. 7) appears on the **Approvals** tile. Each **tile** is like a selectable button. If you click the tile, it will take you to a **subpage**. In this example, you want to check that **Meryl Streep** in on your team. For this, you will navigate to the **My Team** subpage. Click the **My Team** tile.



Step	Action
8.	Note that the page name changes to the subpage **My Team.** On some items on pages, a green button appears. This button is called **Related Actions** and provides quick links to navigate to other pages. The **Related Actions** button appears next to Meryl Steep's name. Click the **Related Actions** button.
9.	The options on the **Related Actions** menu will depend upon your current page and the roles that you have. Left arrows indicate additional menu items. In this example, there are additional submenus under **Time Management.** Click the **Time Management** link. 
10.	The **Time Management** submenu appears. Close the Related Actions menu by clicking the **Close** button.
11.	When on a subpage, you can return to the prior page using the **Back** button in the upper left-hand side of a subpage. If there is sufficient room, the name of the prior page will appear. In this example, the name of prior page is **Manager Self Service.** Return to the prior page. Click the **Back** button.

Step	Action
12.	The page name changes to **Manager Self Service.** Tiles navigate to a subpage. Some Tiles provide access to additional subpages. One example is the **Team Absence and Time** tile. Click the **Team Absence and Time** tile.

Step	Action
13.	A left menu appears. Note that View Time has an additional down arrow. This indicates that there is a submenu. Click the **Expand** arrow.
14.	An expanded submenu appears. The menu item now has an up arrow. This indicates that the submenu can be closed. Click the **Collapse** button.
15.	Return to the Home page. Click the **Home** button.

Step	Action
16.	When you are finished using Manager Self Service, be sure to Sign Out. Sign Out is located on the **Actions List**. Click the **Actions List** button.
17.	Click the **Sign Out** link.
18.	You have completed this tutorial. **End of Procedure.**

1.2 Overview of Manager Self Service

Manager Self Service enables managers to review and submit updates to information for their direct reports.

Managers cannot access their own information using **Manager Self Service**; they will use **Employee Self Service** to report and access their own information.

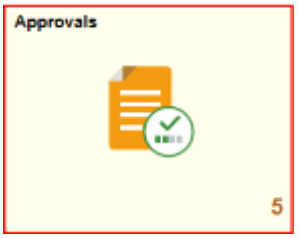
Note: **Delegation** is an **Employee Self Service** function.

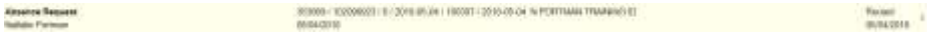
Learning Objectives:

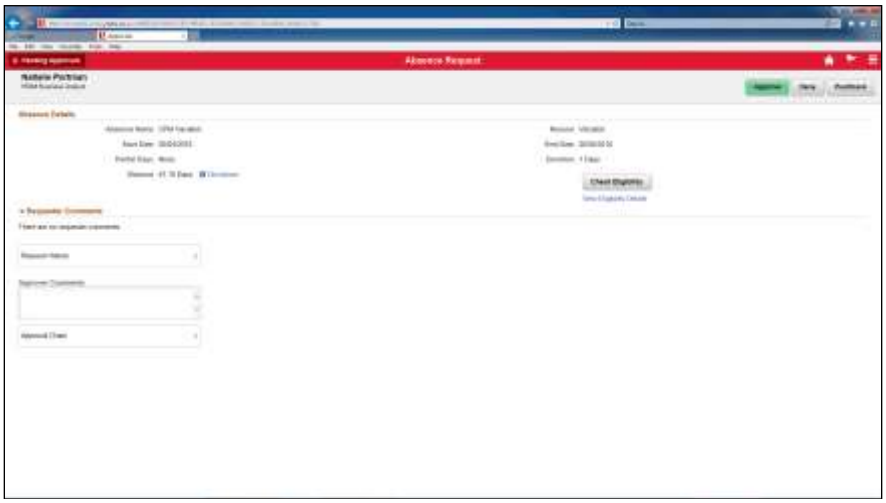
In this tutorial, you will have an overview of Manager Self Service and become familiar with:

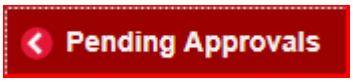
- **Approvals**, particularly for absences (Applies only to CPM, CUPE 1356, CUPE 1356-1, IUOE, YUSA-1 affiliations),
- **Team Absence and Time**, for detail information about absences and time reported for employees that report to you (Applies to all CPM, CUPE 1356, CUPE 1356-1, IUOE, YUSA-1 CTC, CUPE 1356-2, CUPE 1356 PT, Summer Student, Work/Study (General and LEAP), YUSA-2 (Interim and PT) affiliations),
- **My Team,** for team member information,
- **Direct Reports**, for the organization chart and detail job information, and
- **Manager Dashboard**, for alerts, summary information, and quick links to key transactions, including the Reported Time Approvals section- a one-stop-shop for all Time Approvals.

Procedure

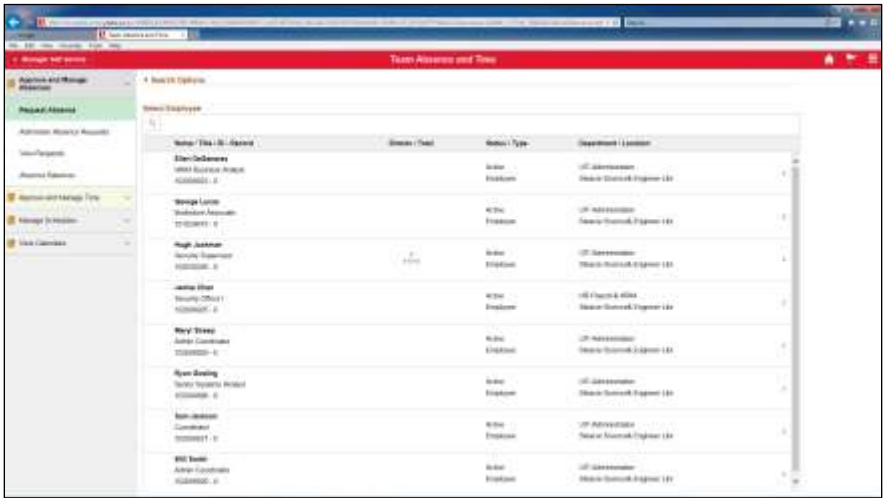
Step	Action
1.	To help managers track outstanding **Absence** requests requiring review, there is a special **Approvals** tile that provides a summary. Absence requests only apply to CPM, CUPE 1356, CUPE 1356-1, IUOE, YUSA-1 affiliations. Detail information is also available from the **Team Absence and Time** tile. The **Approvals** tile indicates the number of outstanding requests waiting review and approval. In this scenario, there are **5** requests pending review. Click the **Approvals** tile 

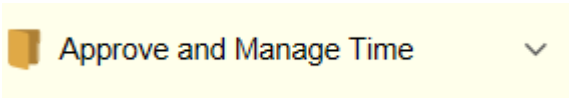
Step	Action
2.	On the **Approvals** page you can see any outstanding approvals. The list of **5** Absence Requests appears. They are in chronological order, with the oldest request at the top. You can select a Request to see the detail. Click the **Request** link. 

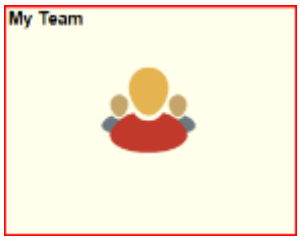


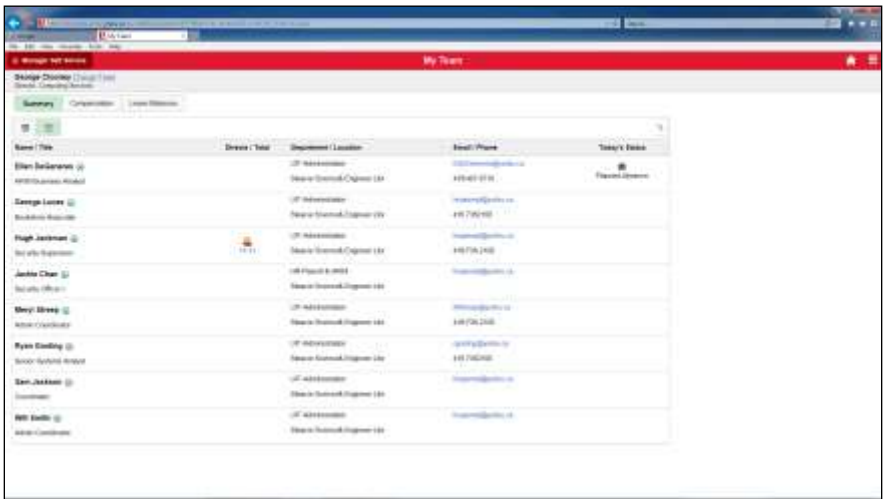
Step	Action
3.	The detail for the request appears. On this page, you may Approve, Deny, or Pushback the request. You can return to the list of **Pending Approvals**. Click the **Return** button. 

Step	Action
4.	You can return to the **Manager Self Service** page. Click the **Return** button.
5.	The **Team Absence and Time** tile provides detail information about the Absences and Timesheets for your direct reports. Click the **Team Absence and Time** tile



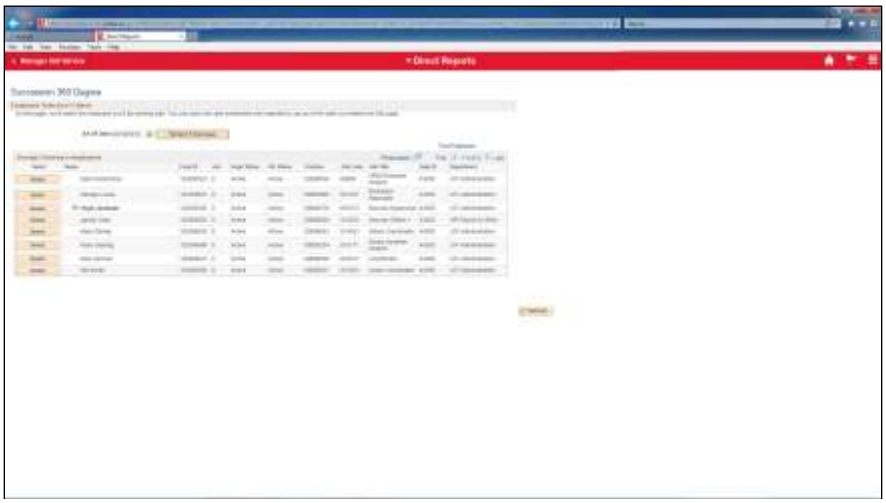
Step	Action
6.	On the **Team Absence and Time** page there are a number of options. You can: - View and approve absence requests, - View and approve submitted timesheets, - Manage employee regular work schedules, and - View calendar summaries for absence and time information for all employees Note: You may need to open additional submenus to access some options. To locate where to view and approve **Timesheets**, click the **Approve and Manage Time** link. 
7.	The full menu for **Approve and Manage Time** appears. **Approve Reported Time** is the second option on the submenu. Return to the Manager Self Service home page. Click the **Return** button.

Step	Action
8.	The **My Team** tile provides access to a summary of your team members and their Leave (i.e. Absence) Balances. Click the **My Team** tile. 



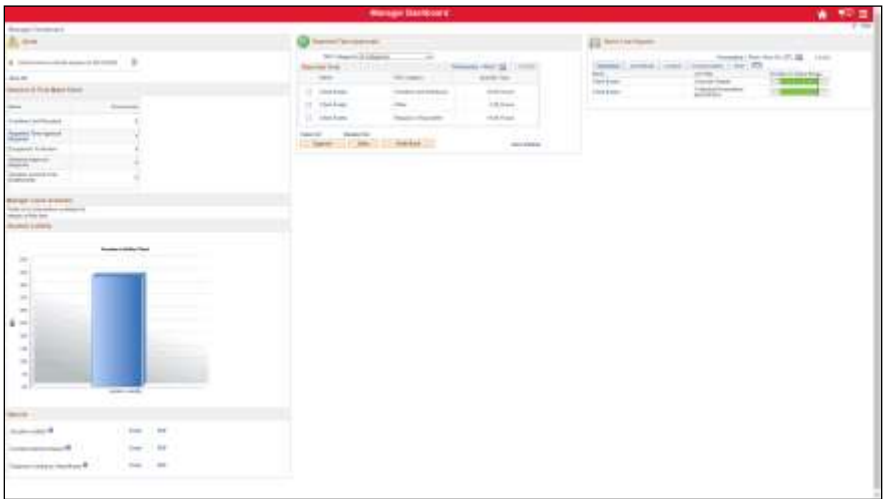
Step	Action
9.	On the **My Team** page you can view a summary of information about your team. Click the **Manager Self Service** button.

Step	Action
10.	The **Direct Reports** tile provides a list of employees and detailed information about their jobs. Click the **Direct Reports** tile.



Step	Action
11.	On the **Direct Reports** page you can view detailed information about employees. For example, employee IDs are available. All employees who currently report to you appear. Employees with a status of Active or On Leave, and any empty positions are also included. Employees with a status of Terminated are included if they currently have active employees/positions reporting to them. Click the **Manager Self Service** button.

Step	Action
12.	Click the **Manager Dashboard** tile.
13.	The Manager Dashboard page provides alerts, summary information, and quick access to transactions and reports.
14.	The **Reported Time Approvals** pagelet provides a quick reference to all outstanding time approvals by category.



Step	Action
15.	To exit the Manager Dashboard, click the **Home** button.
16.	**End of Procedure.**

2. Viewing Your Team

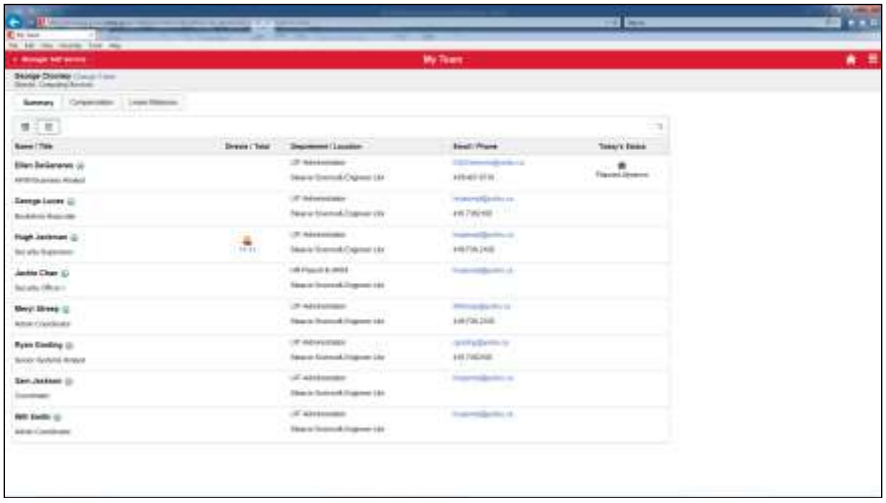
2.1 Viewing Your Team

Learning Objectives:

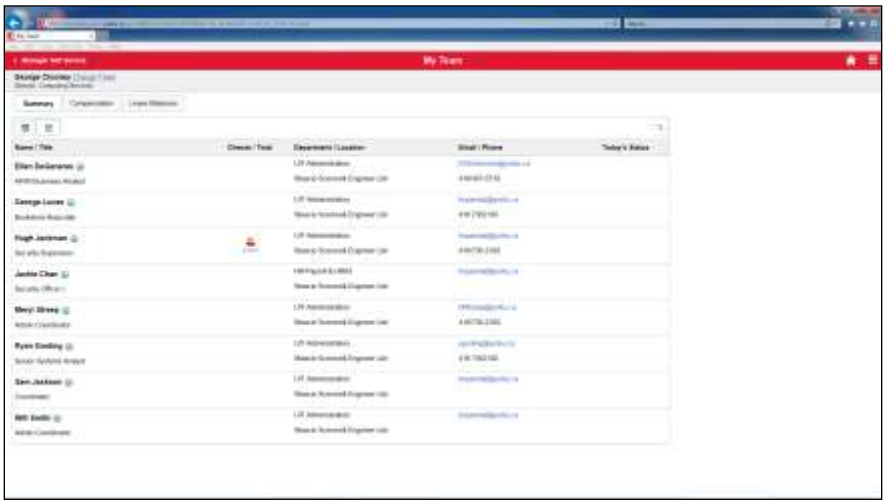
In this tutorial, you will learn how to:
- check the list of employees that report to you, and
- view a summary of Leave (i.e. Absence) Balances for these individuals.

Procedure

Step	Action
1.	Click the **My Team** tile.
2.	The team list appears. Note that Hugh Jackman's team has 11 employees. You can view that team list by selecting the **Directs/Total** link. We will look at the alternate **Card** format display for this information and **Leave Balances** for the team members.



Step	Action
3.	The employees that report to the manager are displayed in **List** format. This can be changed to the **Card** format. Click the **Card** button.
4.	This is the list of employees in Card format. This can be changed to the list display format by using the **List** button. Click the **List** button.



Step	Action
5.	You now wish to view the **Leave** (i.e. Absence) **Balances** for all members of your team. Click the **Leave Balances** tab. Leave Balances
6.	The **Leave (i.e. Absence) Balances** for employees appears. Note: The **Balances** are as of the last processing date; any subsequent accrual or use of balances would not be in the summary.
7.	You have completed this tutorial. **End of Procedure.**

2.2 Viewing Direct Reports and the Organization Chart

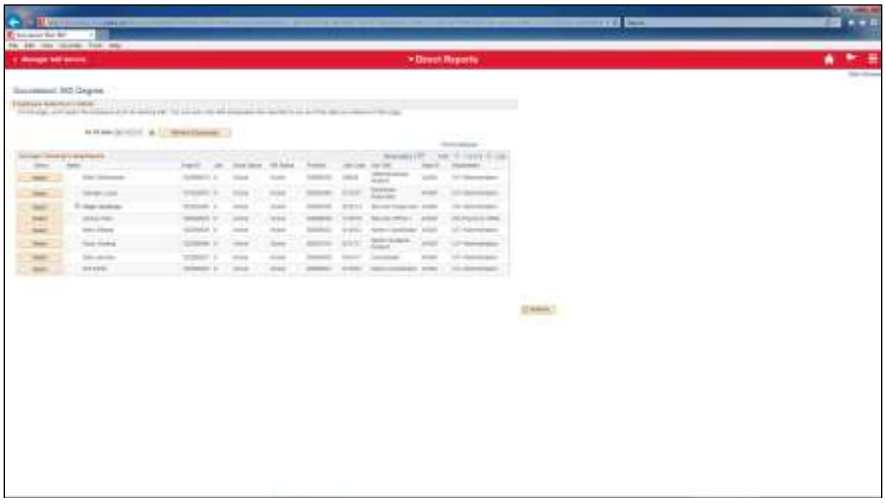
Learning Objectives:

In this tutorial, you will learn how to view information about your direct reports and locate the related organization chart.

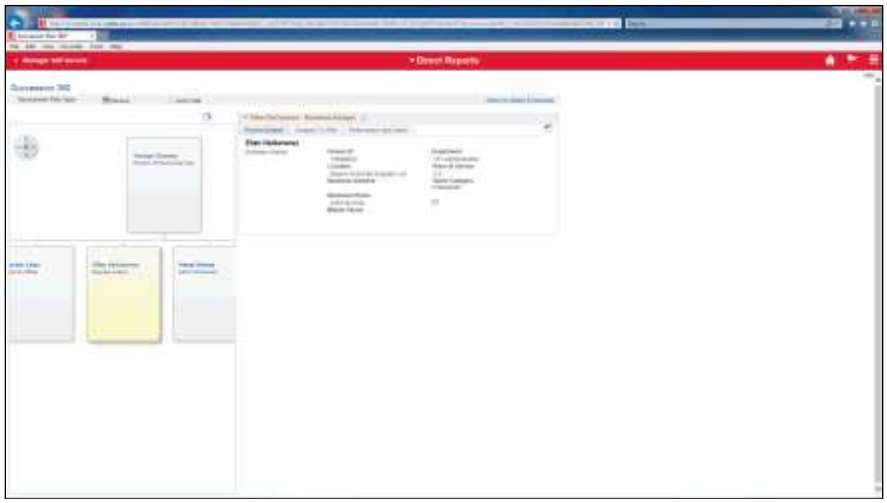
In this scenario, you are a manager and you wish to view the position details and organizational chart that contains Ellen Degeneres.

Procedure

Step	Action
1.	Click the **Direct Reports** tile.
2.	All employees who currently report to you appear. Employees with a status of Active or On Leave, and any empty positions are included. Employees with a status of Terminated are included if they currently have active employees/positions reporting to them. The (+) sign appears if your direct reports have direct reports. You can drill down by selecting the (+). In this scenario, Hugh Jackman has direct reports. **What if the information is not correct?** If any information is incorrect, contact Human Resources. For example, an incorrect job code/department, or an employee who does not report to you appears in your list. If an employee is missing from your reporting structure you will need to initiate an Employee Transaction Form (ETF) to adjust the **Reports To** information.



Step	Action
3.	Note: On some mobile devices, the list of employees may not appear immediately. In this case, selecting the Page Name provides a submenu. Try this now. Click the page name (i.e. **Direct Reports**) link.
4.	Click the **Succession 360** link.
5.	To view the graphical organization chart that contains an employee, you will need to **Select** the employee. In this scenario, you wish to view the organization chart that includes Ellen Degeneres. Click the **Select** button.



Step	Action
6.	The screen is split into 2 columns. The organization chart appears on the left of the page and the employee's details appear on the right side. Move the organization chart to the left. Click the **Left** button.
7.	Move the organization chart to the right. Click the **Right** button.
8.	View the entire organization chart. Click the **Maximize** button.
9.	Click the **Return to Select Employees** link. Return to Select Employees
10.	You have completed this tutorial. **End of Procedure.**

3. Manager Dashboard

3.1 Manager Dashboard Overview

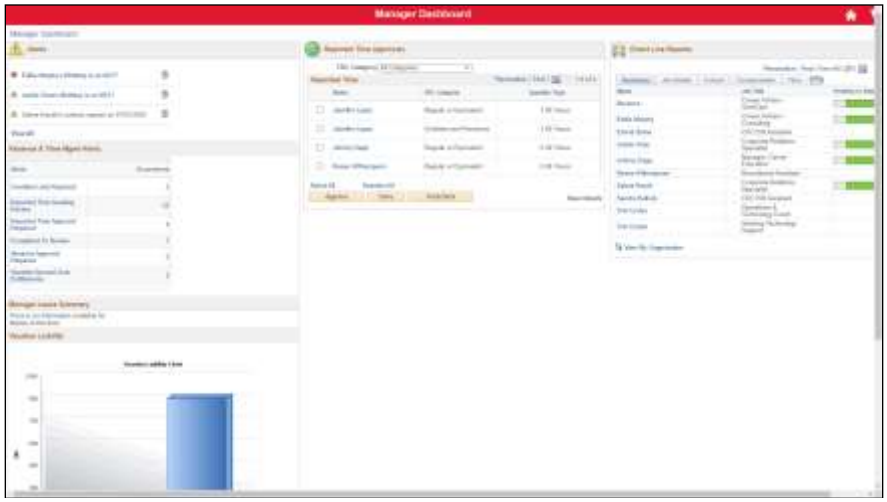
Learning Objectives:

The Manager Dashboard provides important HR information needed to manage your employees, including several reports and quick links.

In this tutorial, you will become familiar with the information and quick links available from the Manager Dashboard.

Procedure

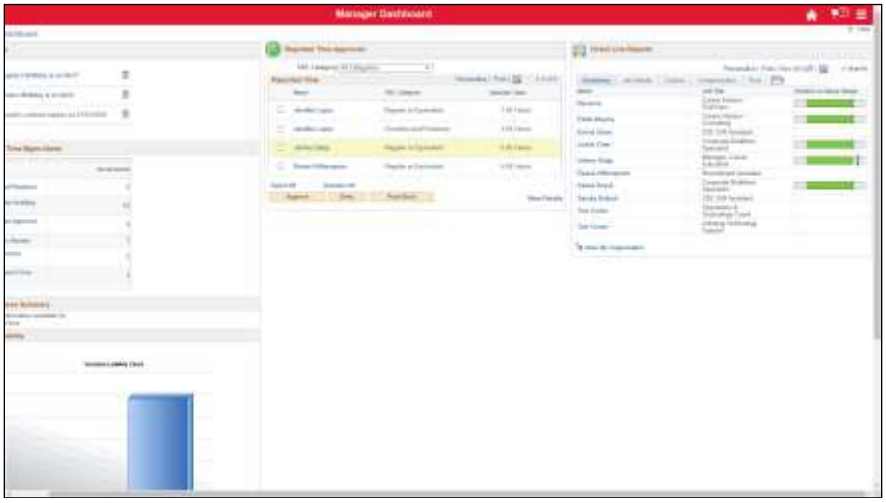
Step	Action
1.	Click the **Manager Dashboard** tile.



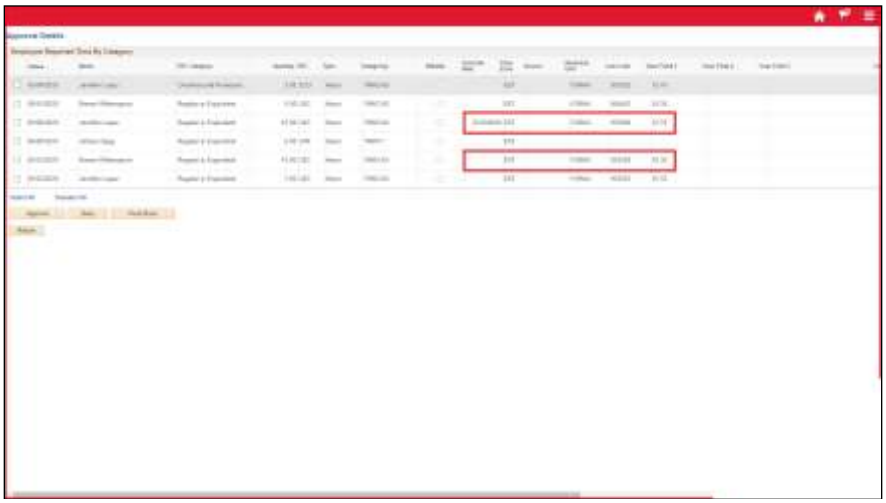
Step	Action
2.	The ***Manager Dashboard*** provides a variety of critical HR information needed to manage your employees, including several reports and quick links. The Dashboard has 7 sections.
3.	The first section of the Manager Dashboard page is for general ***Alerts***. These may include: - Birthdays, - Contracts coming up on completion within 30 days, or casual assignments ending within 30 days, and - Individuals scheduled to return from leave.

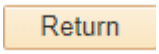
Step	Action
4.	The second section of the Manager Dashboard page has ***Alerts*** specific to time reporting and absence management. In this section you will see the following alerts: **Overtime Limit Reached*** - displays the number of employees who have exceeded their banked overtime limit. This includes employees who report directly to you, or to your direct reports. **Reported Time Awaiting Review** – displays the number of instances (each punch) of casual employee reported time awaiting validation from your Reviewer (if applicable). **Reported Time Approval Required** - displays the number of instances of reported time, such as overtime, or casual employee reported punches requiring approval. **Exceptions to Review** - displays the number of Exceptions (i.e. potential errors) in submitted timesheets from direct reports. **Absence Approval Required** - displays the number of Absence Requests submitted from **direct reports awaiting approval.** **Vacation Amount Over Entitlements*** - displays the number of employees, who are either direct or indirect reports, and who are over their annual vacation entitlement. ***Note:** The data displayed in these reports is as of end of the prior day. Refer to the "Manager Alerts" topic for more information on these alerts.
5.	The third section of the Manager Dashboard is the ***Manager Leave Summary***. This area shows the upcoming absences within the next 7 days. This includes both submitted and approved absences for permanent or contract (non-casual) employees only.
6.	The fourth section of the Manager Dashboard provides a summary of ***Vacation Liability***. *Vacation Liability* is the total dollar value of outstanding employee vacation credits. Employees are permitted to carry forward some of their vacation credits to the following year. Any vacation credits above the allowed maximum are in excess. The dollar value of the excess credits is the Cost in Excess. **Note:** If you move your cursor to one of the bars in the bar chart, the dollar value will display.
7.	The fifth section of the Manager Dashboard provides quick access to commonly used ***Reports***. They are available in both Excel and PDF formats. Many of the reports are the same as those available from eReports. **Note:** The data displayed in these reports is one day old. It includes employees who either report directly or indirectly to the manager.

Step	Action
8.	These reports include: **Vacation Liability** – your total department vacation liability, by employee. It highlights any employees over the allowable maximum shown in time (days or hours as applicable) and cost based on current salary. **Overtime Banked** – overtime balances and outstanding liability based on current salary, for your permanent and contract (non-casual) employees. **Note:** The PDF version highlights employees who are over their allowable banked maximum. **Employee Listing by Department** – a summary of your employees' basic job information, including employee ID, name, employee status, position number, job title, contract type, location and email address, by affiliation. **Reported Time Awaiting Review** – a detailed report of casual employee reported time awaiting validation from your Reviewer (if applicable).
9.	The sixth section of the Manager Dashboard provides a quick view of individual time awaiting approval in the last 60 days, by Time Reporting Category. While there is the ability to approve, deny, or push back time from this section, we recommend you use the ***Reported Time Approval Required*** alert from the Dashboard instead, which takes you to the Timesheet. From the Timesheet, you can see the detailed information to determine whether to approve the time, and any outstanding time beyond 60 days prior. This is especially important for casual employees to see all punch time reported and/or be able to override the rate of pay for non-standard job code entries. **Caution:** Approving time from this page could result in errors in pay. Never push back or deny from this summary page, as all-time will be pushed back or denied. Should a push back or deny be required, action it from the Timesheet or the "View Detail" page.



Step	Action
10.	Click on the name link of an employee you wish to view or click the **View Details** link to see all employees with outstanding time approvals. Click the **View Details** link. View Details



Step	Action
11.	The *Approval Details* page appears and displays additional information related to each time entry. You can sort by clicking on the header of each column. You can generally action your non-casual time from this page, provided no changes are required. While you can action the casual employee time approval from this page, it is recommended to use the ***Timesheet*** to confirm all required information has been updated. For example, override rate or budget information. Click the **Return** button to go back to the Manager Dashboard. 
12.	The seventh section of the Manager Dashboard includes organizational information. The area provides a list of direct reports. Managers can "drill-down" to see detailed information about employees. Also, the tabs provide quick access to: - job details, such as employee IDs - contact information, such as email addresses, - compensation, and comparison to a salary range, and - Time and Absence balances. The link to ***View My Organization*** allows further "drill down" to other employees who indirectly report to you.
13.	You have completed this tutorial. You now have a better understanding of the information found on the Manager Dashboard. **End of Procedure.**

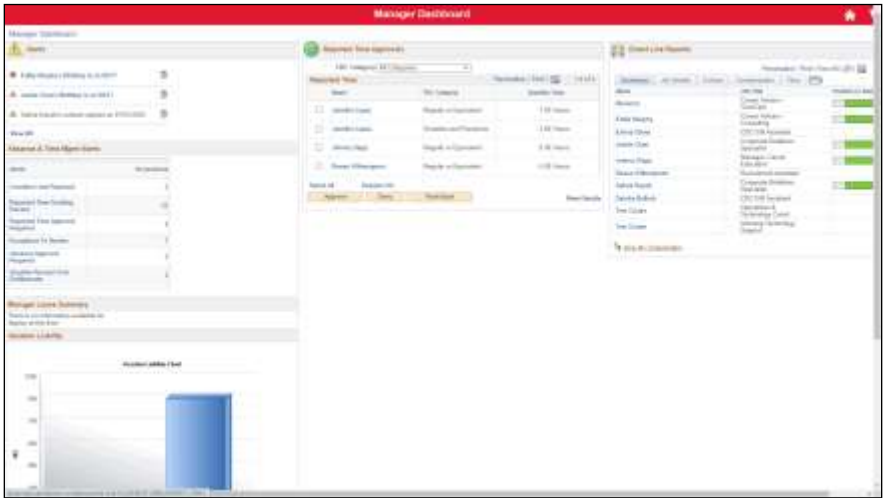
3.2 Manager Dashboard Alerts

Learning Objectives:

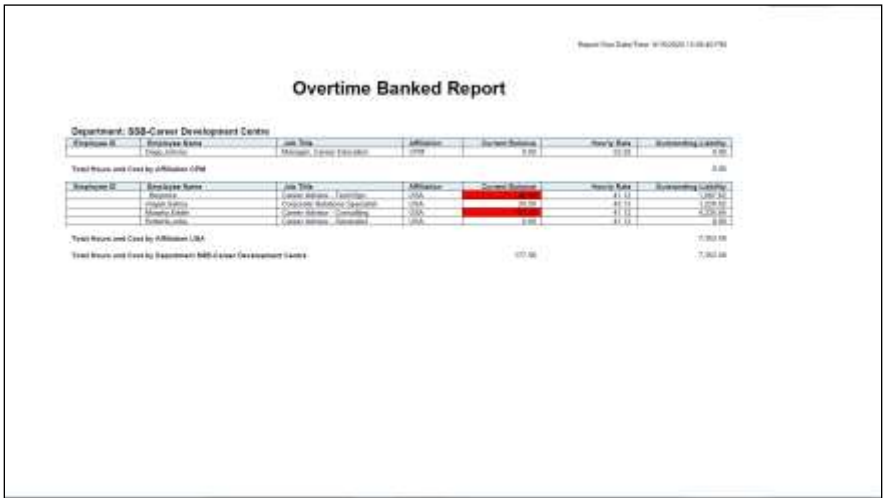
In this tutorial, you will become familiar with the Absence and Time Alerts available from the Manager Dashboard.

Procedure

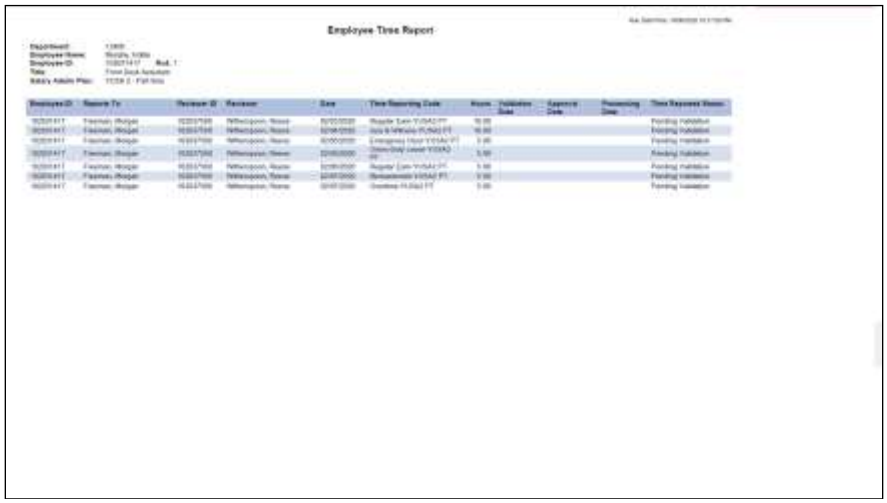
Step	Action
1.	Click the **Manager Dashboard** tile.



Step	Action
2.	The ***Absence and Time Management Alerts*** section provides links to issues that require action. The first alert is **Overtime Limit Reached**. This alert displays the number of employees who have exceeded their banked overtime limit. This includes employees who report directly and indirectly to you.
3.	Click the **Overtime Limit Reached** link. Overtime Limit Reached
4.	Double-click the **PDF** download to open it. Overtime_Banked (....pdf

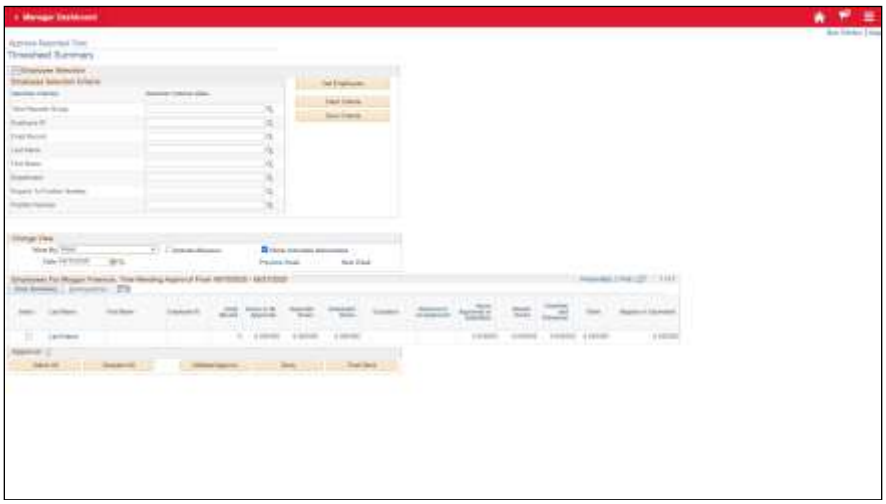


Step	Action
5.	The PDF displays the current balance for all employees and highlights in red those over the allowed maximum.
6.	The second alert is ***Reported Time Awaiting Review***. This alert displays the number of instances (each punch) of casual employee reported time awaiting validation from your Reviewer (if applicable). Click the **Reported Time Awaiting Review** link.
7.	Double-click the **PDF** download to open it.

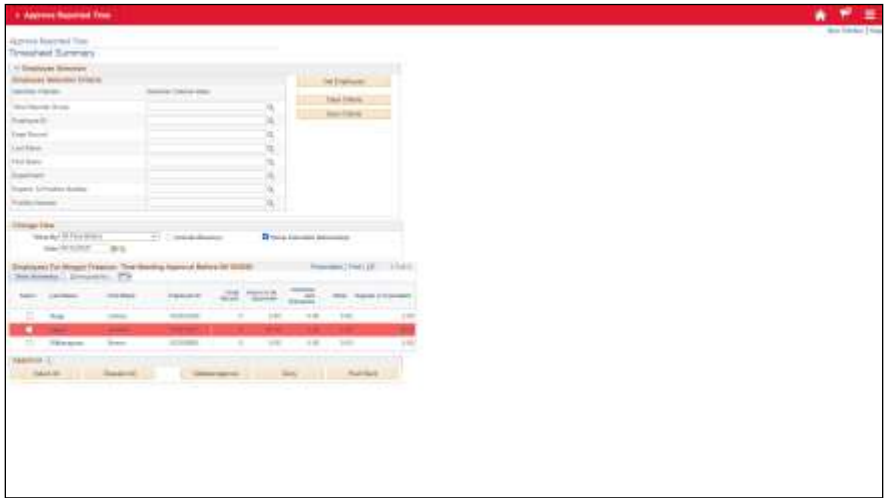


Step	Action
8.	The ***Employee Time Report*** shows time by date and TRC that has not yet been validated. Each page shows a different employee. After reviewing this report, you should follow up with your reviewer to ensure these employees reported time is validated to allow you to approve.

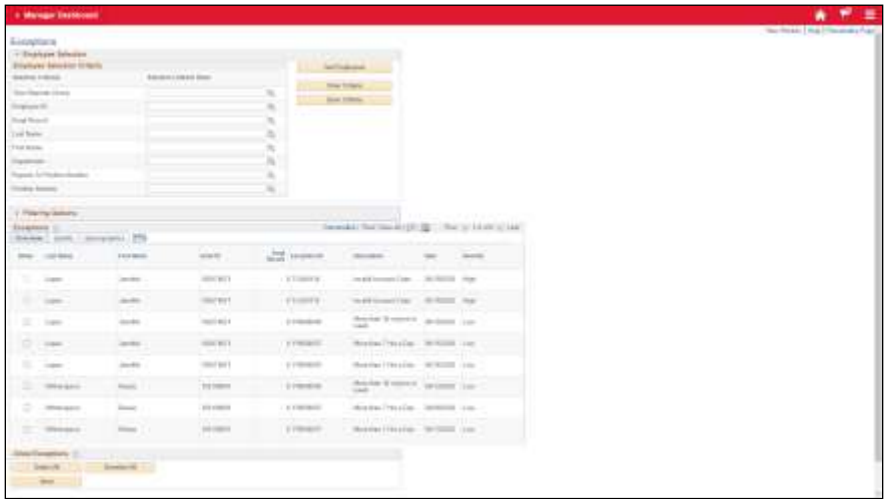
Step	Action
9.	The third alert is **Reported Time Approval Required**. This Alert displays the number of instances of reported time, such as overtime, or casual employee reported punches requiring approval in the last 60 days. This alert links to the **Approve Reported Time** page. In this scenario, you see 4 outstanding occurrences. This includes only employees who report directly to you. Refer to the "Managing and Approving Time" topics in the ***Time Reporting Tool (TRT) for Managers*** course and follow the same steps to find all time before today's date to approve. Click the **Reported Time Approval Required** link.



Step	Action
10.	The *Approve Reported Time* page appears. Select the "All Time Before" option in the **View by** field and view all the employees who have time outstanding.
11.	The list displays all employees with outstanding time to approve.



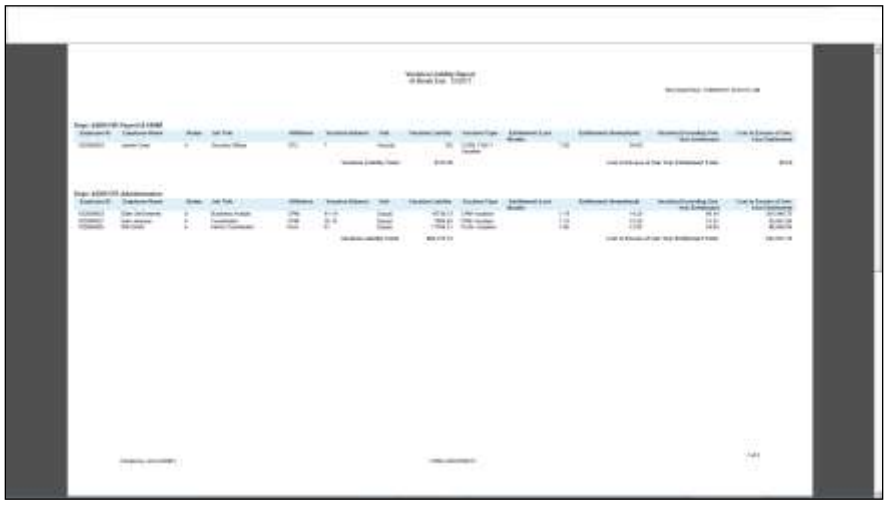
Step	Action
12.	Click the **Approve Reported Time** button to return to the Dashboard.
13.	The fourth alert is ***Exceptions to Review***. This alert displays the number of exceptions (i.e. potential errors) in submitted timesheets. Refer to the "Managing Exceptions (Time Reporting Errors)" topic in the ***Time Reporting Tool (TRT) for Managers*** course and follow the same steps to locate all exceptions to resolve. Click the **Exceptions to Review** link.



Step	Action
14.	Click the **Get Employees** button to return all exceptions. Use this list to identify the employee name and date of the exception and navigate to that timesheet to action. **Note:** If exceptions are not resolved, the employee may not get paid correctly.
15.	Click the **Manager Dashboard** button to return to the previous page.
16.	The fifth alert is ***Absence Approval Required***. This alert displays the number of absence requests submitted from direct reports awaiting approval. Click the **Absence Approval Required** link.

Step	Action
17.	The *Absence Approval* page appears and displays a list of absence requests awaiting approval. Only Absences within the prior 90 days will appear. Absences within the prior 60 days can be approved. For all others, please contact hrhelp@yorku.ca with details.
18.	Click the **Manager Dashboard** button to return to the previous page.

Step	Action
19.	The sixth alert is ***Vacation Amount over Entitlements***. This alert displays the number of employees, either your direct reports, or employees of your direct reports, who are over their annual vacation entitlement limit. This alert displays only those employees who are over the limit. The *Vacation Liability Report* in the **Reports** section shows all employees and their vacation liability. Click the **Vacation Amount Over Entitlements** link. Vacation Amount Over Entitlements



Step	Action
20.	**Note:** The report shows details as of the end of the prior month.
21.	You have completed this tutorial. You now have a better understanding of the alerts found on the Manager Dashboard. **End of Procedure.**

4. Delegation of Manager Tasks (in Employee Self Service)

4.1 Creating a Delegation Request

You are able to delegate your Time and Absence approval responsibilities to others for a specific period of time.

You may choose to delegate transactions if you:
1. Know that you will be away from the office for a specific period of time, such as a vacation,

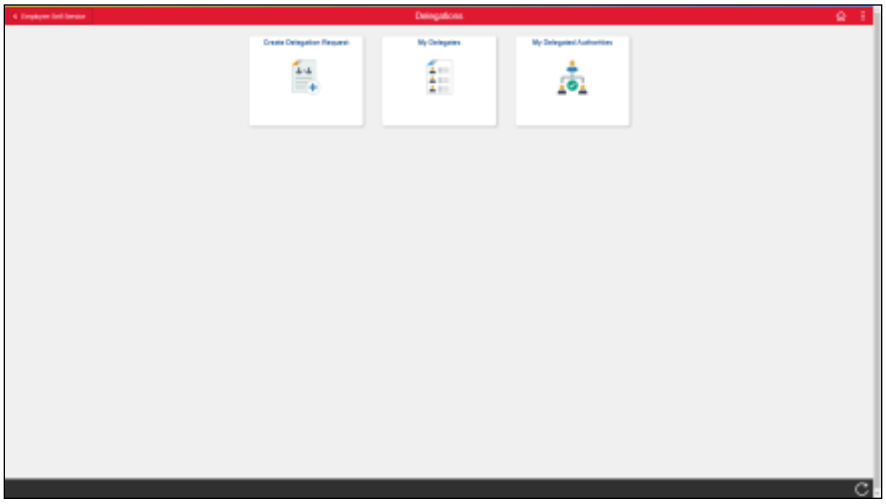
and will not be able to manage transactions for your employees, or
2. Are using the Timekeeper model in CSBO and need to delegate entry of Time and Absences to a Timekeeper.

The individual to whom you delegate is known as a "**proxy**". The steps in the process are:
1. **Request.** First, you invite the proxy to act on your behalf for specific approvals.
2. **Proxy Accepts**. The proxy must accept your invitation. If for example, they will be away, they may decline the invitation so that you may select an alternate.
3. **Automated Activation**. Then, the system automatically activates the delegation during the time period specified; the proxy can act on your behalf.

Procedure

Step	Action
1.	**Note:** Delegation is done in **Employee Self Service.** This is because approval authority is assigned to you, an individual. You can temporarily designate someone to act on your behalf. The transactions that you are delegating, however, appear in **Manager Self Service**.

Step	Action
2.	Click the **Delegations** tile.



Step	Action
3.	Click the **Create Delegation Request** tile.

Step	Action
4.	The Start Date defaults to the current date. In this scenario, you will be away until November 5, 2021. Click in the **End Date** field.
5.	You can use the calendar to enter dates. Alternatively, you can enter the date in the MM/DD/YYYY format. In this example, the date that we want is November 5, 2021 or 11/05/2021. Enter **11/05/2021** into the **End Date** field.
6.	Click the **Next** button.

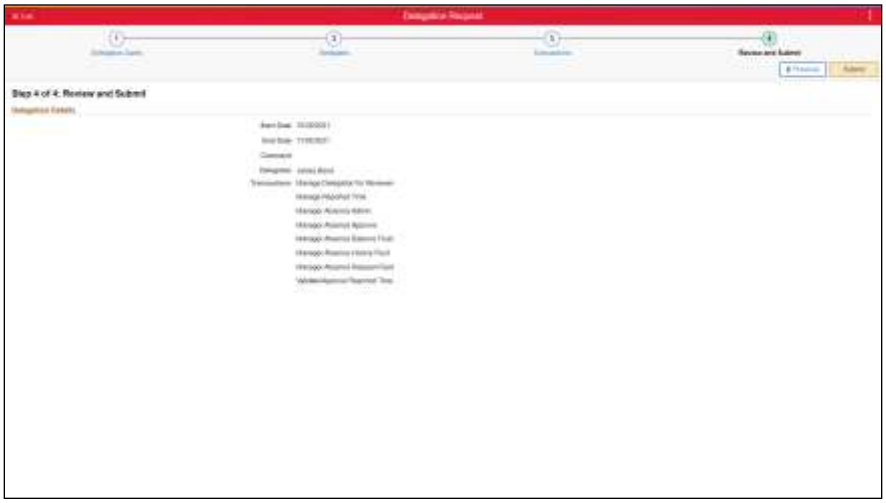
Step	Action
7.	Click the **Add Delegate** button.

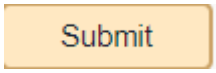
Step	Action
8.	If you know the person's Passport York Username, enter it in the **User ID** field. If not, click the **Magnify Glass** object to search for the User ID by name.

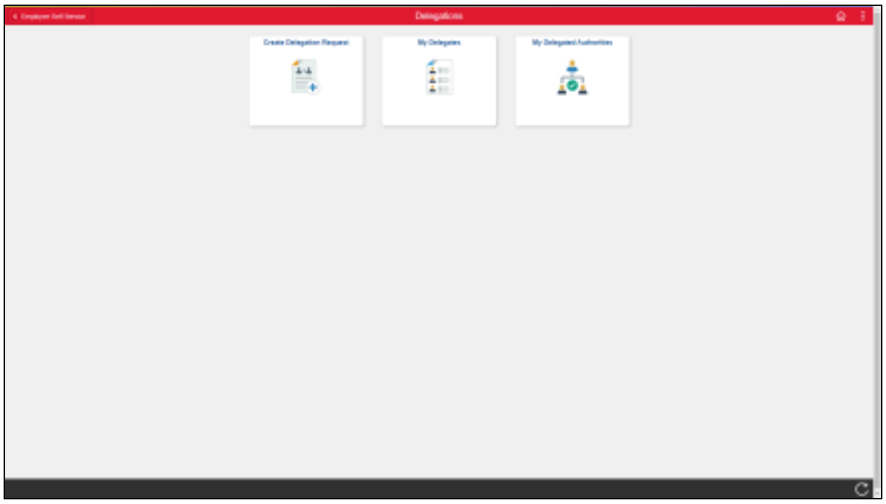
Step	Action
9.	Click the **Search Criteria** row header.
10.	Click in the **Last Name** field.
11.	Enter the desired information into the **Last Name** field. Enter "**Bond**".
12.	Click in the **First Name** field.
13.	Enter the desired information into the **First Name** field. Enter "**James**".
14.	Click the **Search** button.
15.	Click the **appropriate row.**
16.	Click the **Done** button.

Step	Action
17.	You must select all transactions that need to be delegated. Click the **Select All** button.

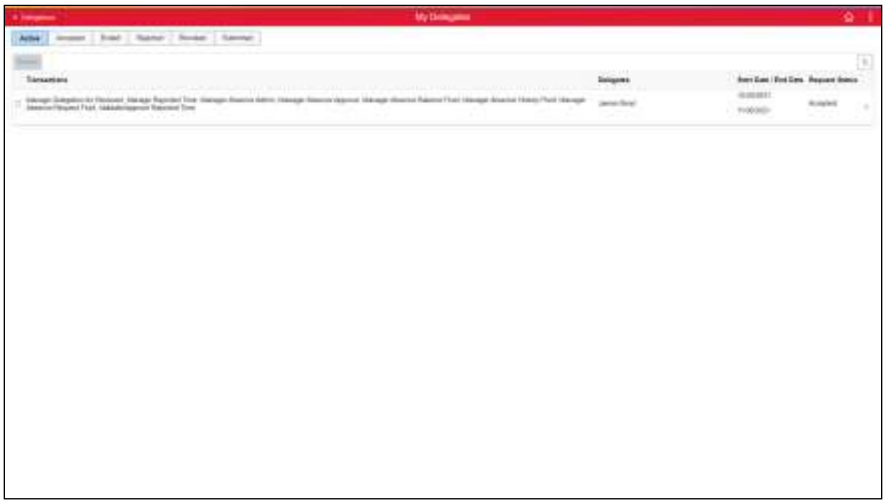
Step	Action
18.	Click the **Next** button.



Step	Action
19.	Click the **Submit** button. 
20.	The invitation to **James Bond** to act on your behalf is successful and an email is sent for action.



Step	Action
21.	To check if your proxy has accepted the invitation to act on your behalf, click the **My Delegates** tile.
22.	James Bond has accepted your invitation to act on your behalf. Since the request was to begin immediately, note that the status is Accepted and active. If you had chosen a delegation to start on a future date, it will be inactive until that date.



Step	Action
23.	Click the **Delegations** link to return to the previous screen.
24.	You have completed this tutorial. **End of Procedure.**

4.2 Accepting and Reviewing Delegation Requests

Learning Objectives:

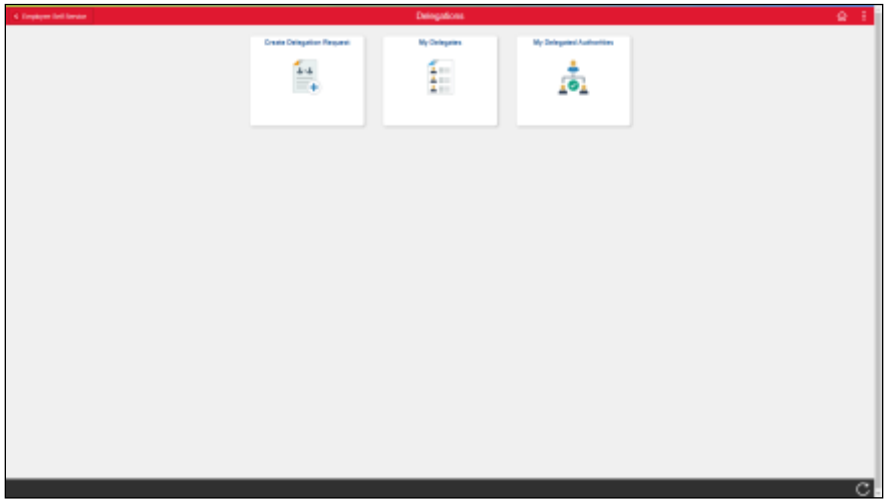
In this tutorial, you will learn how to:

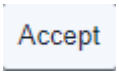
- Review a notification of a request to act on behalf of an individual for approvals, and,
- Accept the delegation.

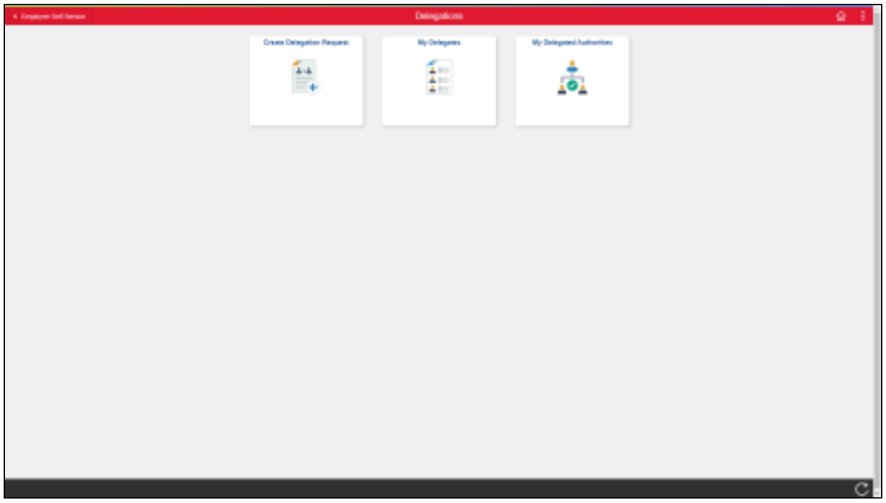
A **"proxy"** is an individual who has agreed to act on behalf of another individual for specific approvals. First, the proxy is invited to act on behalf of another individual. The proxy must accept the invitation in order for the delegation to be active.

Procedure

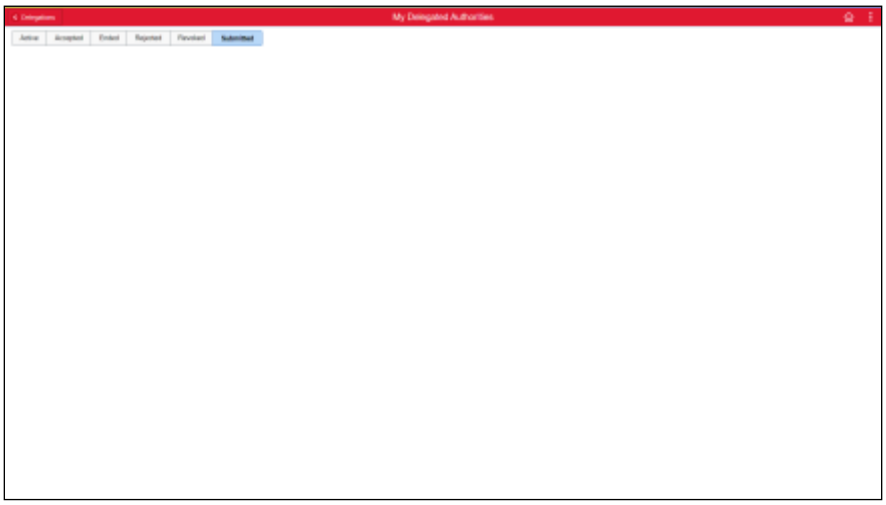
Step	Action
1.	Click the **Delegations** tile.

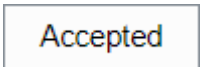


Step	Action
2.	Click the **My Delegated Authorities** tile.
3.	Click the **Row** checkbox. **Note:** You may click on the row to view more details.
4.	Click the **Accept** button. 
5.	Click the **Yes** button.
6.	*A message will display at the top to indicate the delegation has been accepted.* Click the **Delegations** button to return to the previous screen.



Step	Action
7.	At any time, you can confirm what transactions are delegated to you. Click the **My Delegated Authorities** tile.



Step	Action
8.	To review the delegations that are Accepted, click the **Accepted** link. Alternatively, you can click on the **Active** link. 

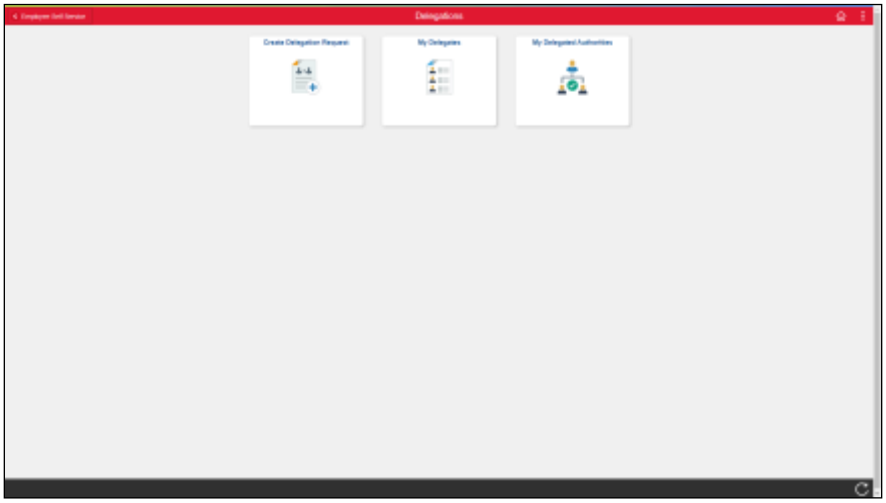
Step	Action
9.	The list of Accepted Delegations appears. The most recent delegation will be at the top of the list. In this scenario, the October 28 to November 5 delegation appears.
10.	You have completed this tutorial. **End of Procedure.**

4.3 Revoking a Delegation Request

Learning Objectives:
In this tutorial, you will learn how to revoke a delegation request.

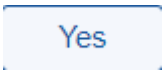
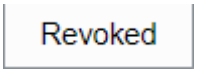
Procedure

Step	Action
1.	Click the **Delegations** tile.



Step	Action
2.	Click the **My Delegates** tile.

Step	Action
3.	Click the **Checkbox** for the associated row.

Step	Action
4.	Click the **Revoke** button.
5.	Click the **Yes** button. 
6.	The Delegations have been revoked.
7.	To review the revoked delegation, Click the **Revoked** button. 
8.	You will see the request status is "Revoked". Click the **Delegations** link to return to the previous screen.
9.	**Congratulations!** You have completed the "Introduction to Manager Self Service" course. In summary, you now know how to navigate and find important information about your team, delegate important tasks when you are away, and utilize the various alerts and information on the Manager Dashboard. **End of Procedure.**

Time Reporting Tool (TRT) for Managers

1. Managing and Approving Time

1.1 Approving Reported Time

Time entry in Employee Self Service (ESS) will be reported as one of the following types: Exception Time, Positive Time (Elapsed), or Positive Time (Punch).

Exception Time Reporting:

Employees on salary do not have to report their normal work hours to receive their salary. However, they do need to report any additional time, such as overtime, to get paid or to accrue the additional time. Activities that replace regular time worked, such as training and union duty leave, are also reported on the timesheet.

Positive Time Reporting (Elapsed):

Work Accommodation, for Time and Absence reporting, is when a salaried employee has been approved for a modified work schedule. An employee on a modified work schedule may be instructed to do one of the following:

1) Report any unworked time as an Absence Request using available Absence Credits. This follows the normal process for Absence Requests.

2) Report their worked time on a Timesheet. Employees on work accommodation report elapsed hours (e.g. 7 hours) for each day worked.

Positive Time Reporting (Punch):

Casual employees do have to report their normal work hours to receive payment. They also need to report any additional time (e.g. overtime) or premiums (e.g. shift premium). Casual employees report their time as "Punch Time" e.g. In, Meal, In, Out.

Important! Timesheet approval must be completed before the payroll submission deadline to ensure employees are paid on time.

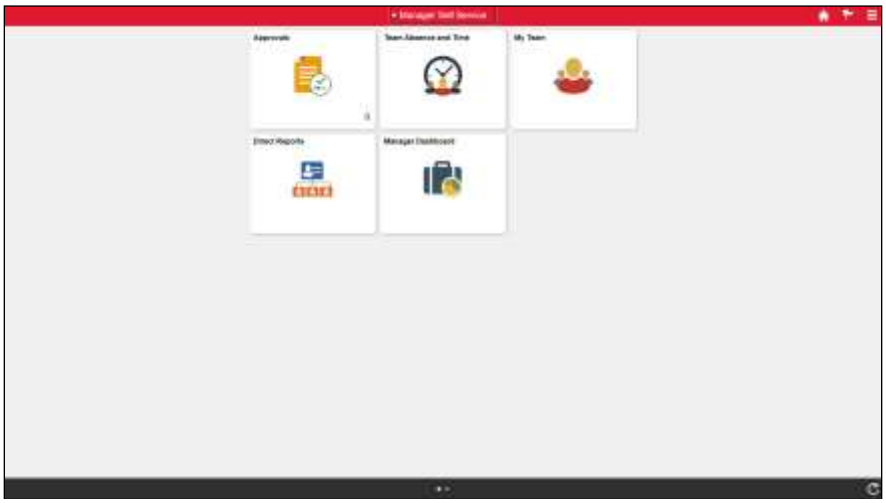
The Timesheet reporting approval deadline is outlined in the payroll schedules that are located on the **Employee Resources** tab of YU Link under the path:

Yulink > Employee Resources > Forms and Documents > Compensation and Payroll > Payroll Schedule
Learning Objectives:

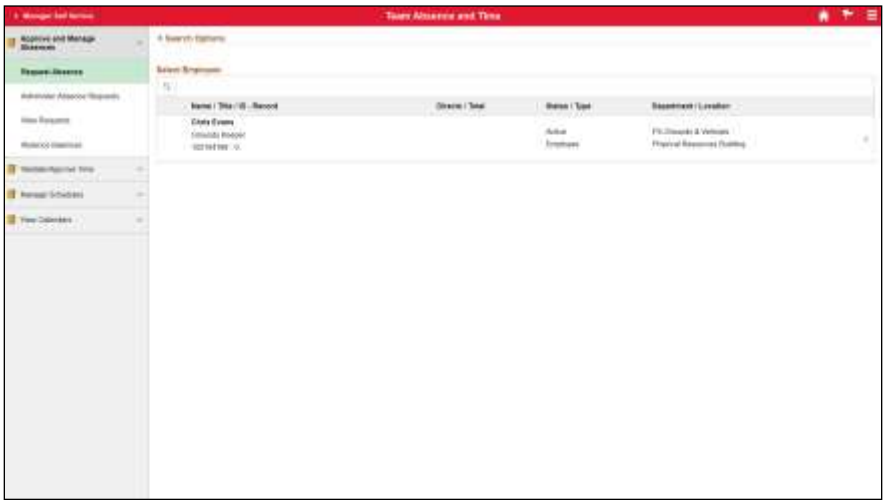
In this tutorial, you will learn how to:

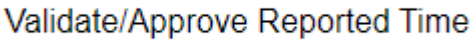
- approve timesheets for a specific period for salaried and casual employees, and
- review the account to which specific reported time is being charged.

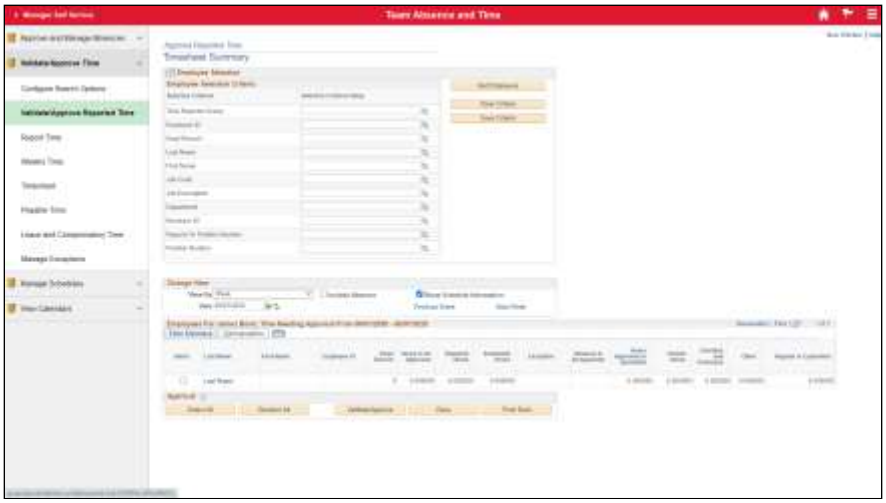
Procedure



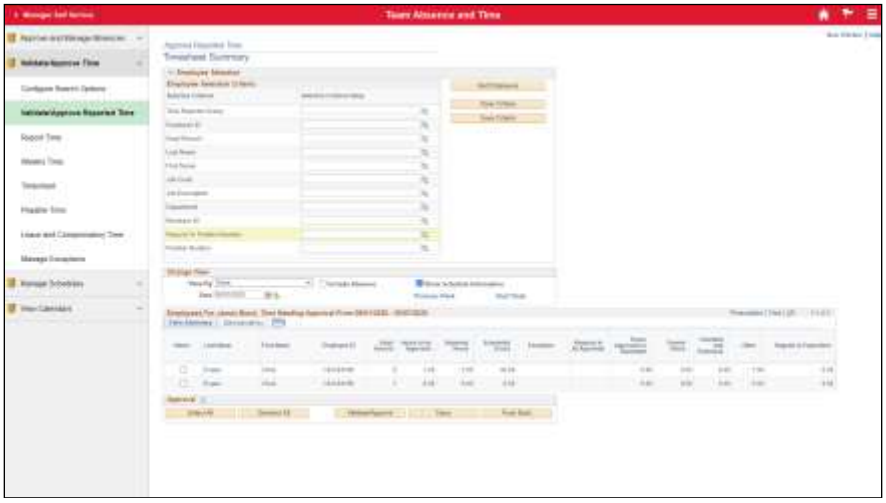
Step	Action
1.	Click the **Team Absence and Time** tile.



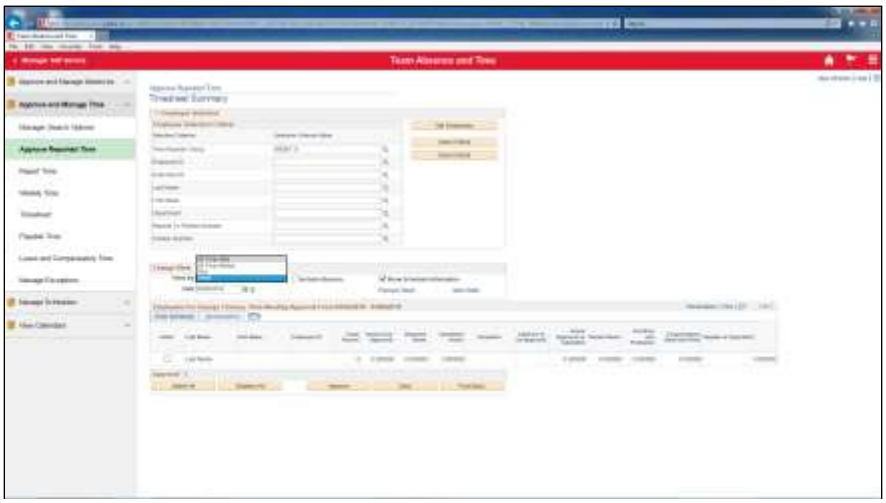
Step	Action
2.	Click the **Validate/Approve Time** link.
3.	Click the **Validate/Approve Reported Time** link. 



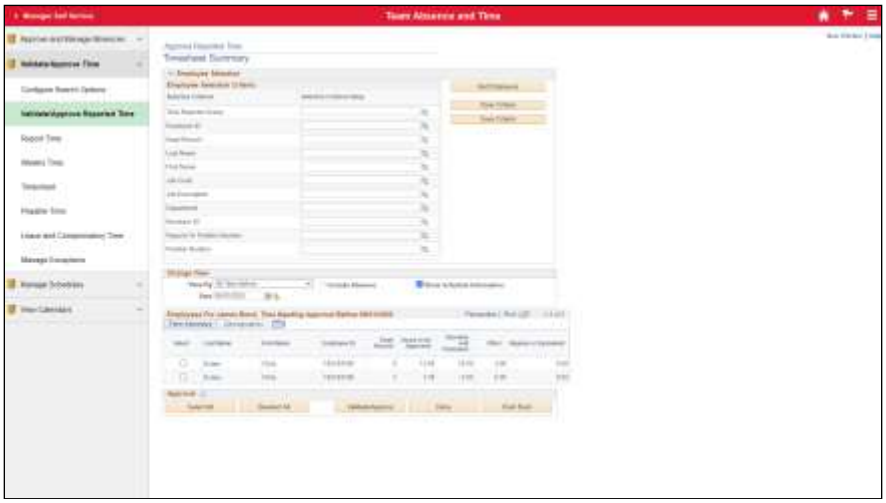
Step	Action
4.	Click the **Get Employees** button. You may use the search criteria to only display results for a particular scenario e.g. only show casual employees who report to one of your reviewers (or to you as a reviewer) by populating the **Reviewer ID** field. **Note:** If you have been delegated time approval responsibility for another manager, you will be prompted to select either the name of the manager or yourself, before proceeding to the next step.



Step	Action
5.	The **View By** field defaults to *Week* and the **Date** field defaults to the current date. Click the arrow to the right of the **View By** field.

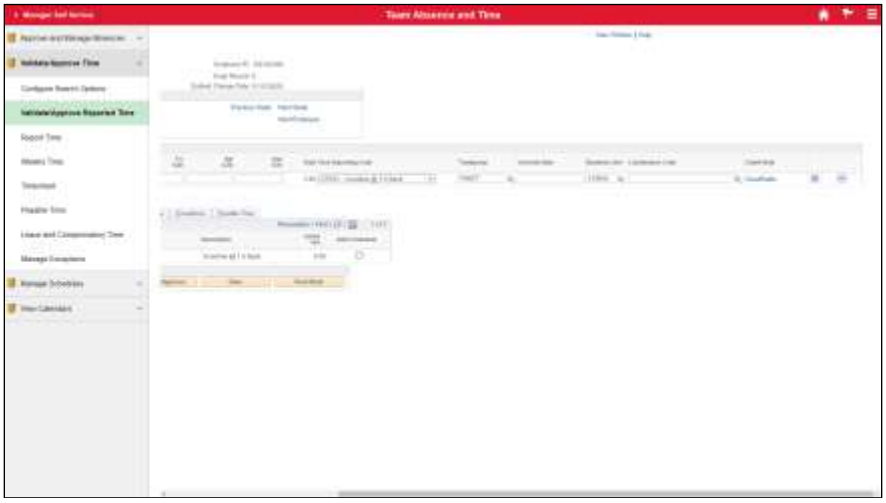


Step	Action
6.	There are four *View By* options. Depending on the option you select, the system searches for and displays employees who have reported time pending approval: - **All Time After** (or since) the date specified in the Date field. - **All Time Before** the date specified in the Date field. - The **Day** specified in the Date field. - The **Week** specified in the Date field. Select the **All Time Before** list item. This is the recommended setting to ensure you return all time needing approval, including previous pay periods. All Time Before
7.	The default is the current date. You can keep this date or use the calendar.



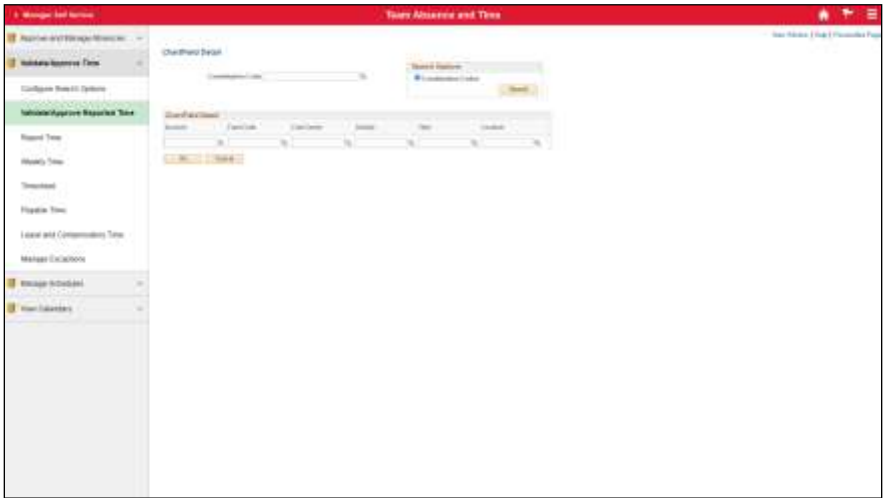
Step	Action
8.	Once the **View** options are selected, you must refresh the page. Click the **Refresh** button.
9.	All employees with time pending approval will appear in the **Employees For…** section in the **Time Summary** tab. Each job an employee has, where they report to you, is represented by an employment record number displayed in the **Empl Record** column.

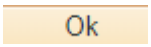
Step	Action
10.	The **Hours to be Approved** column displays the total number of hours still outstanding approval for each employment record. This total will include the current pay period hours submitted, and any prior pay period hours submitted not yet approved. **Note:** Hours that have not yet been validated by a reviewer will not appear until they have been validated and are awaiting your approval. You will have access to view all ***Reported Time Awaiting Review*** on the **Manager Dashboard**.
11.	The next 3 columns - **Overtime and Premiums**, **Other** and **Regular or Equivalent** – display the summary total hours by each category for information purposes.
12.	The **Demographics** tab displays more information for each job record, including the **Job Code**, **Position Number**, and **Reviewer ID.** *Position Number* is used for permanent and contract jobs (non-casual) where the employee's position reports to your position. *Reviewer ID* is used for casual jobs. If you have a reviewer, their employee ID is listed. If you do not have a reviewer, your employee ID is listed. This indicates that the casual employee reports directly to you.
13.	Click the **Show all Columns** icon to merge the information in both the *Time Summary* and *Demographics* tab into one combined view. This will allow you to see the employment record number, combined with either a position number or reviewer ID, to determine for which job the employee has reported time. **Note:** Any of the values displayed in the columns can be used in the ***Selection Criterion Value*** field above.
14.	Although you can select an employee and approve time from this page, doing this will approve all outstanding time for this employee. To identify the specific approval request by date and type, click the name link for a given employee. **Caution:** *Pushing back* or *Denying* time at this summary level will cause errors for all reported time for that period for the employee. Click the **Last Name** link.
15.	The earliest timesheet with unapproved hours appears for that employee. Review the ***Reported Status*** column for any time rows that display "Needs Approval." A status of "Pushed Back" indicates time that was previously pushed to the employee for review/action. The employee (or reviewer) can action. For a permanent or contract (non-casual) job, the timesheet shows as elapsed, meaning the number of hours being reported for a day by *Time Reporting Code.*

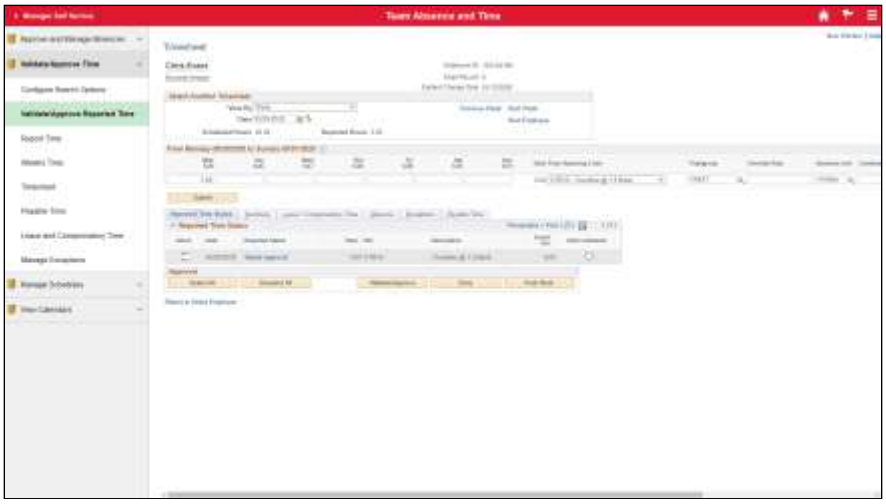


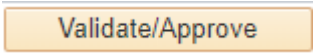
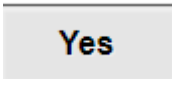
Step	Action
16.	By default, approved time is charged to a standard budget. The **Combination Code** is the system term for York's budget number. By default, the *Combination Code* field on the timesheet is blank, and the system charges the correct budget based on the employee's job. To charge time to another Department or budget, enter a **Combination Code**. If you do not know the combination code, click the **Chart Fields** link to review the budget information fields. ChartFields

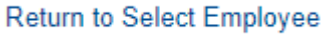
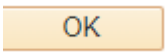
Step	Action
17.	The *ChartField Detail* page appears. The following TRCs are automatically charged to the standard overtime account numbers derived from the regular earning's account: <u>Regular Earnings Account</u> Overtime (OTP) Overtime reduce/payout (OTR) Overtime special (OTS) Double time (DBL) <u>Department-specific accounting for TRC</u> All other TRCs (e.g. Shift Premium) are charged to the regular earning's account. If your unit uses a different account for such TRCs, the entire combination code (account, fund, cost centre) must be entered on the timesheet, even if there is only a change to the account number. <u>Multiple distribution accounts,</u> For employees with multiple distribution accounts, the regular hours, as well as overtime or premium hours will also be distributed accordingly. <u>Charging overtime to multiple accounts</u> To charge overtime to two different budgets, split the overtime hours into two rows, and enter the correct combination code for each row.

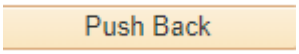


Step	Action
18.	Review and ensure that the time is being charged to the correct budget. Revise if required. **Note:** If you are changing any values on this page, all pertinent information must be entered, at a minimum, *Account*, *Fund Code* and *Cost Centre* must be populated. Click the **Ok** button. 



Step	Action
19.	Click the **Select Checkbox** for the time you wish to approve. **Note:** You may also use the **Select All** button below to auto-select all time awaiting approval.
20.	Click the **Validate/Approve** button. 
21.	A window appears asking if you are sure you want to approve the time selected. Click the **Yes** button. 

Step	Action
22.	An *Approve Confirmation* page appears. Click the **OK** button.
23.	Click the Next Week link to find all time to validate and continue to validate time.
24.	When you are done reviewing all outstanding time for this record, click the **Return to Select Employee** link to return to the summary page and approve the next outstanding time record. 
25.	**Note:** The difference between *Hours to be Approved* and *Reported Hours* could mean you as the manager have already approved time for that week, or the reviewer (if applicable) has not yet validated the time.
26.	**Note:** If you notice a record highlighted in red, this indicates changes made by a reviewer to any entries in that week. Click the **Last Name** link.
27.	For a casual job, the timesheet is shown as ***Punch*** time, meaning the employee reports time by reporting the time of day "In" and "Out", including unpaid "Meal" breaks, by *Time Reporting Code*.
28.	If you push back any time to the employee, let them know why by using the "Comments" icon. **Note:** If you modify any field submitted by the employee, or if you add any time rows using the add button (+ sign), comments are automatically updated for audit purposes and available to view after submission by both the employee and the reviewer. There is a different icon for system-generated comments. Click the **Add Comments** icon.
29.	Enter the desired information into the field.
30.	Click the **OK** button. 

Step	Action
31.	Note that the ***Comments*** icon changes to indicate there is a comment associated with this row. In the **Select** column, individually select the checkbox associated with the row you wish to push back. Click the **Select** option.
32.	Click the **Push Back** button. 
33.	A window appears asking if you are sure you want to push back the time selected. Click the **Yes** button.
34.	A *PushBack confirmation* page appears. Click the **OK** button.
35.	**Note:** If the reviewer entered this time on behalf of the employee, the email generated for the pushback for the reviewer will not link them to the employee's timesheet. Therefore, the reviewer is instructed to locate the employee ID and the date of the pushed back time in text of the hyperlink, and then navigate to that timesheet to action the pushed back time.
36.	If the employee is working another job, and a new job code is not already set up in the system, employees are instructed to add a new line and select the **Job Code** associated by clicking the **Magnifying Glass** icon. All job codes associated with that salary admin plan will appear in the search. The new job will display the current rate of pay. Reviewers (or managers if no reviewer) must override the actual pay before validating the time, by entering the rate in the **Override Rate** field (*even if it is the same as the current main job rate*). Failure to do so will prompt an error message. When you do this, click the **Submit** button, then click the **Validate/Approve Time** button. If this is an overtime transaction, use the regular rate of pay, as the system will automatically calculate the overtime rate for all overtime transactions. Never enter the overtime rate of pay in the override rate.

Step	Action
37.	Review the cost center and ensure that the time is being charged to the correct budget. Revise if required. Scroll to the far right of the page.
38.	If you need to change the accounting information for a particular transaction, click on the **ChartFields** link. The *ChartField Detail* page appears. Enter the appropriate information and click "Ok" to override the default accounting information. If there is time split between any element of the ChartFields, for example, between two different activities, each time entry must be entered separately as different time. In this example, the time will be charged to the default account based on the employee's job.
39.	Click the **Next Week** link to find all time to validate and continue to validate time. Click the **Next Employee** link to get to the next employee who has outstanding unapproved time and continue to click “Next Week” until all hours have been approved.
40.	Click the **Return to Select Employee** link. Return to Select Employee
41.	Ensure that the **Hours to be Approved** is "0". If not, continue approving until it is.
42.	**End of Procedure.**

1.2 Reporting Time On Behalf of an Employee

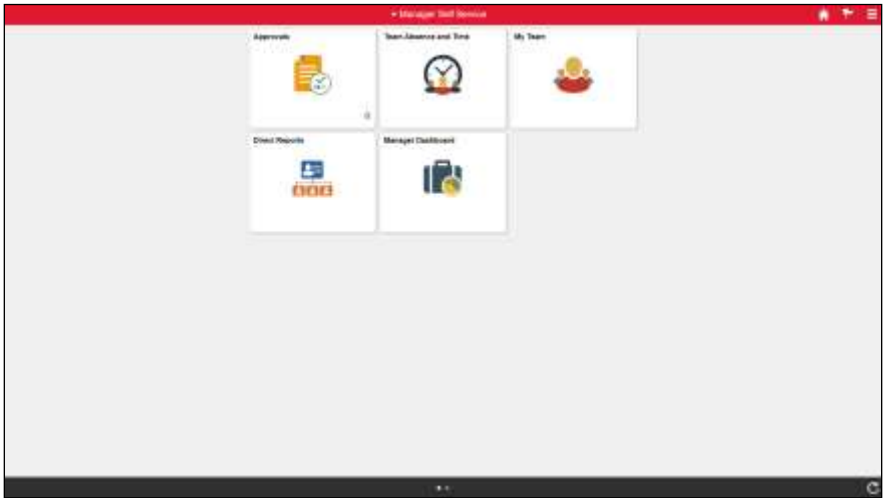
Learning Objectives:

In this tutorial, you will learn how to:

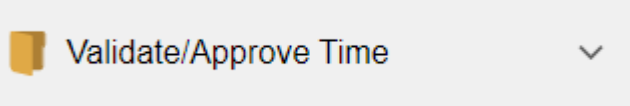
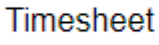
- report time on behalf of an employee, and

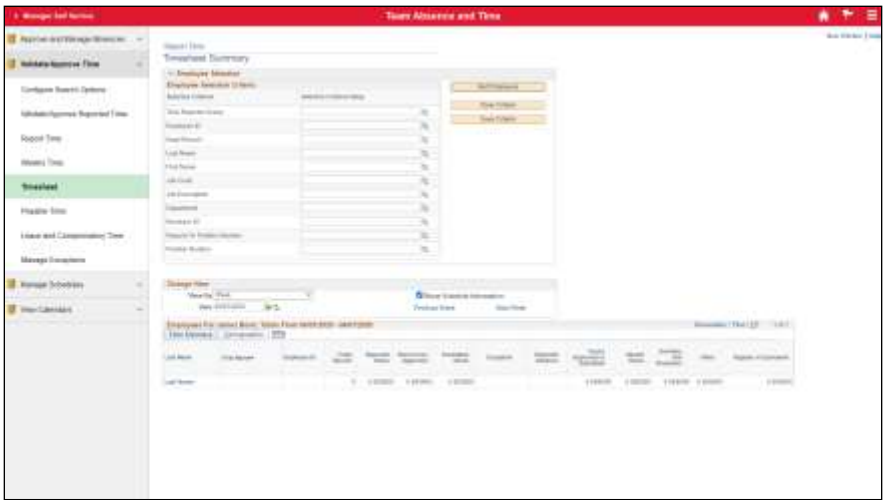
- approve the new reported time.

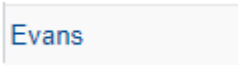
Procedure



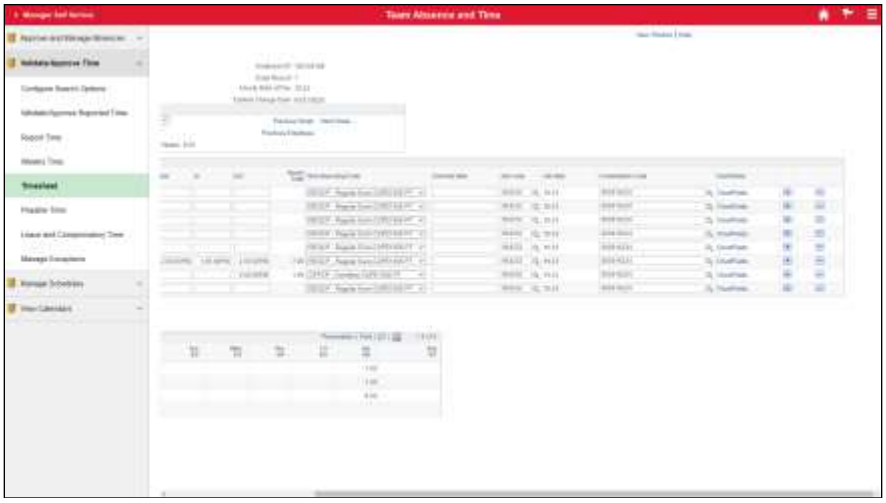
Step	Action
1.	Click the **Team Absence and Time** tile.

Step	Action
2.	Click the **Validate/Approve Time** link. 
3.	Click the **Timesheet** link. 



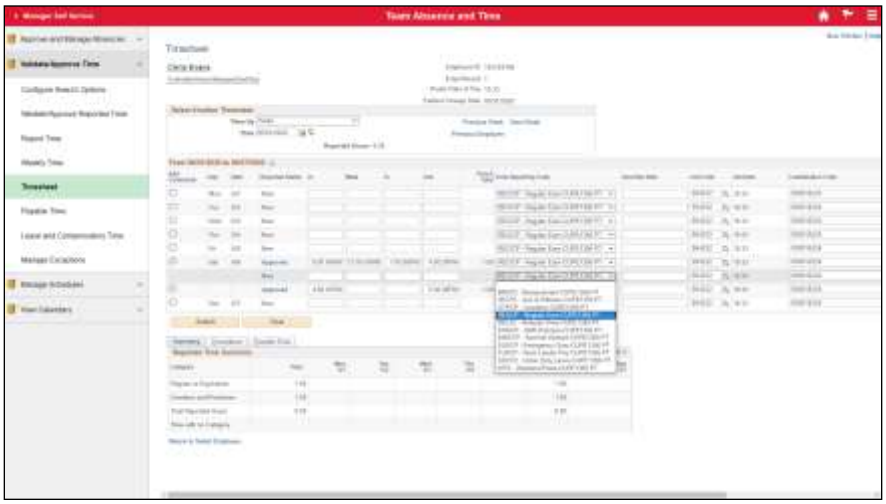
Step	Action
4.	By default, the ***Employee Selection Criteria*** is blank and will return all of your direct reports when you click the "Get Employees" button. Should you wish, you may add search criteria to refine your employee search. Click the **Get Employees** button.
5.	Click the **Last Name** link for the appropriate employee. 
6.	The *Timesheet* defaults to the current date. If you need to, you can navigate to a different week by changing the date, and clicking the **Refresh** icon to refresh the page, or using the "Previous Week" and "Next Week" links.

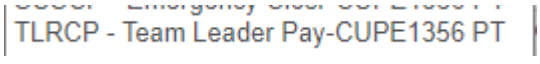
Step	Action
7.	**Note:** Employees who work on Saturdays or Sundays can change the **View By** option to “Calendar Period” instead of “Week”. This will show the entire time reporting period, starting on the Sunday of the start of the pay period, up to the current date. Also, the *Reported Time Summary* is organized by week.
8.	At a minimum, you must punch the employee "In" and "Out" for each time code. For a typical 7- or 8-hour shift, you will generally have 4 punches per day – “In”, “Meal”, “In”, and “Out”. Note: You do not need to record breaks other than their meal break. If there is no meal break, you only punch "In" and "Out". If the employee has split shifts or multiple splits on the same day with unpaid time in between each, you must add a new row (+sign) and report an “In” and “Out” for each row. **Note:** Overlapping time is not allowed. For example, if the regular punch out time is 4 pm, and the employee starts working overtime at 4 pm, enter 4:00:01 pm in the “In” field of the overtime row. Enter the time in the appropriate **In**, **Meal**, **In** and/or **Out** fields.

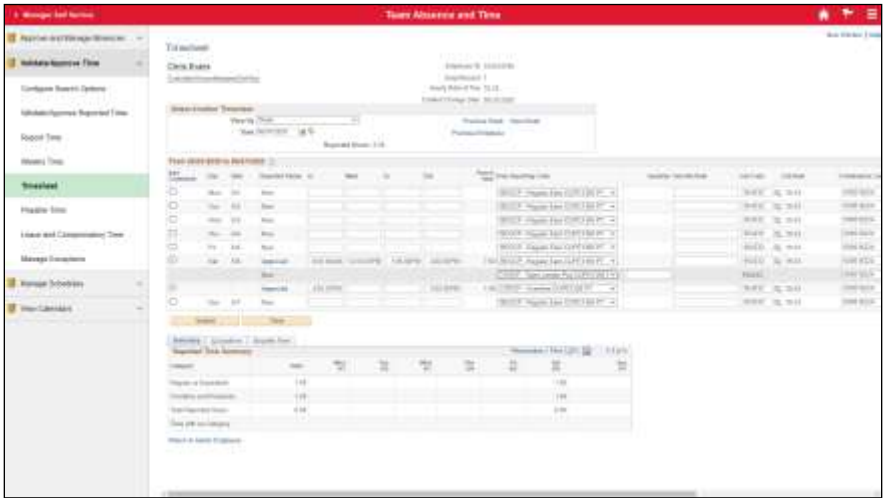


Step	Action
9.	Click the **Plus (+) Sign**.

Step	Action
10.	Click the **Time Reporting Code** dropdown button to activate the menu.



Step	Action
11.	You will only see the Time Reporting Code (TRCs) applicable to that employee's affiliation. The "Regular Time" TRC is the default. If you are reporting time for another TRC, select the appropriate one. Refer to the Time Reporting Codes (TRCs) for Timesheet Submission by Affiliation (YULink) to determine TRC meanings and when to use them. **Note:** The system automatically calculates statutory holiday pay and vacation pay. If the employee works on a statutory holiday, you need to enter that time with the appropriate TRC (Stat holiday worked) and you will get a warning to ensure it is correct. For Overtime worked, you punch time "In" and "Out". For Shift Premium TRCs, you enter the *Quantity* i.e. the number of hours the premium applies to for the day. Select an entry in the list. 



Step	Action
12.	The punch fields are not available, and a new quantity field appears. Enter the number of hours for which they are eligible for team lead pay (can be hours for a full or partial shift). Click in the field.
13.	Enter the desired information into the **Quantity** field.
14.	Click the **Submit** button. Submit
15.	A *Submit Confirmation* page appears. Click the **OK** button. OK
16.	Note that the **Review Comments** icon is automatically updated. This is for audit purposes and displays to both the employee and the reviewer (if applicable).
17.	After you submit the time, you then need to approve it. Click the **Select All** button. Select All
18.	Click the **Validate/Approve** button. Validate/Approve

Step	Action
19.	A window appears asking if you are sure you want to approve the time selected. Click the **Yes** button.
20.	An *Approve Confirmation* page appears. Click the **OK** button.
21.	**Note:** For non-casual jobs, time is entered as ***Elapsed*** time. Since these jobs do not require regular time entered, you would enter exceptions to their regular pay only e.g. overtime and shift premium. Each TRC must be submitted as an independent row, however, all entries for the same TRC can be done in the same row for a week.
22.	**End of Procedure.**

1.3 Correcting Reported Time on Behalf of an Employee

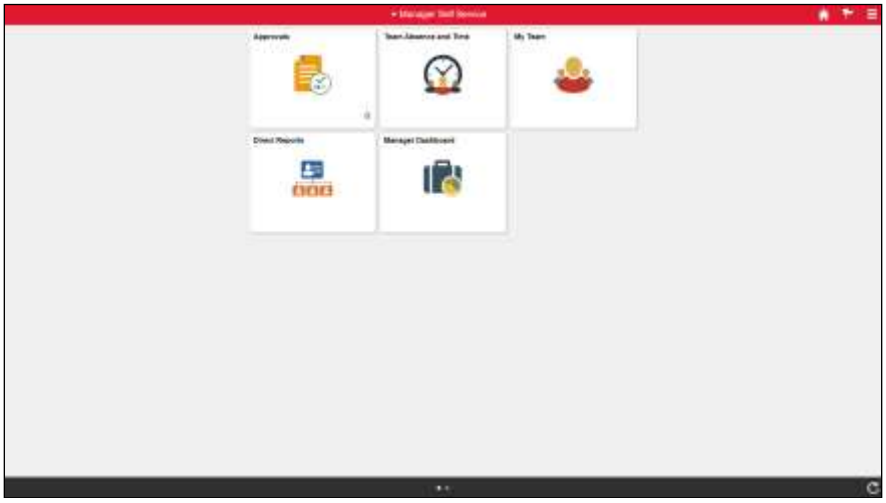
Learning Objectives:

Managers can correct time on behalf of an employee, in cases the employee is not able to, or when a push back is not practical e.g. the employee is no longer active, or it is too close to the payroll submission deadline.

Note: Employees can add time e.g. if it was missed, up to 21 days (casual) and 28 days (permanent or contract (non-casual)) prior to the start of the period. Reviewers can add missed time up to 60 days prior and can make corrections to reported time while they are in the validation process. Any time that they have already validated, can only be corrected by the manager. Any time already approved or paid (status of "Closed") can be revised only by the manager up to 60 days past the date of the time worked. Beyond 60 days, contact hrhelp@yorku.ca.

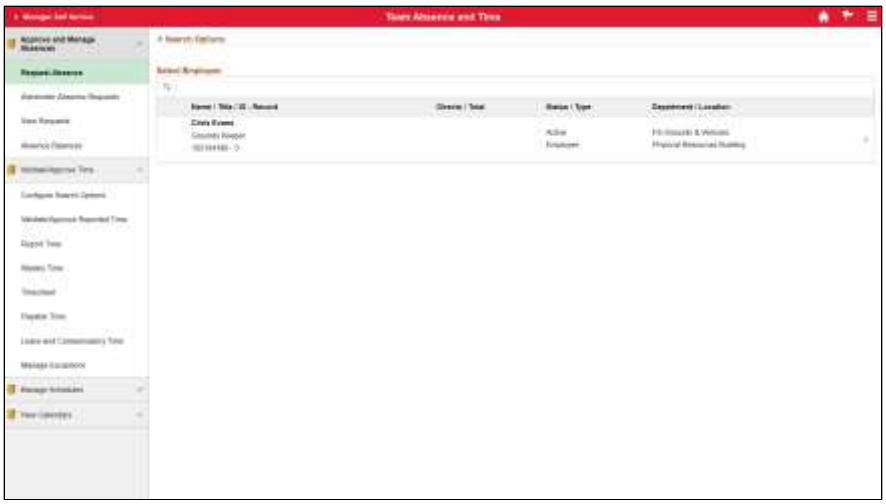
In this tutorial, you will learn how to correct an employee's timesheet for both a permanent and casual job and approve the newly revised timesheet.

Procedure

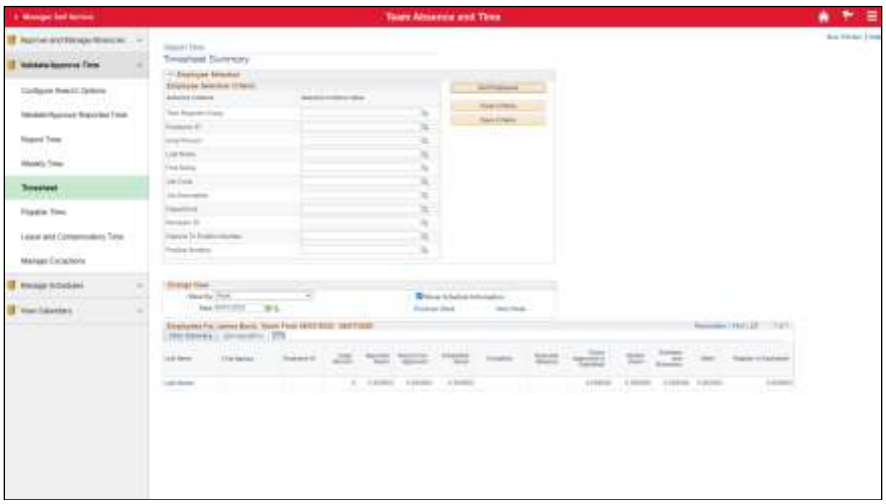


Step	Action
1.	Click the **Team Absence and Time** tile.

Step	Action
2.	Click the **Validate/Approve Time** menu.

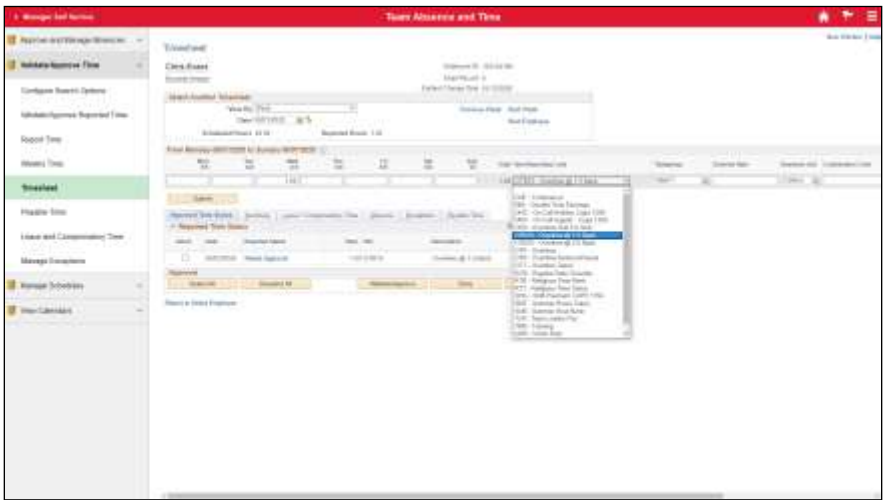


Step	Action
3.	Click the **Timesheet** link. Timesheet

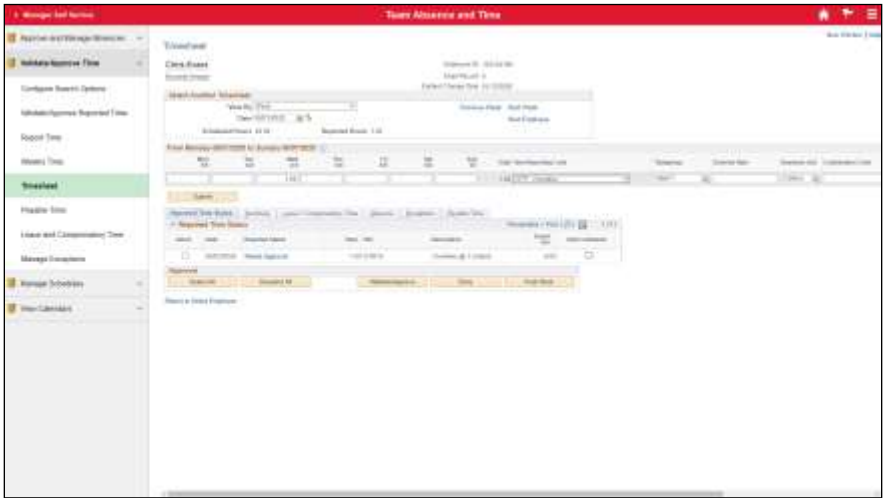


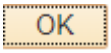
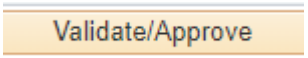
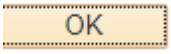
Step	Action
4.	Click the **Get Employees** button. Get Employees

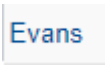
Step	Action
5.	Click the **Last Name** link of the employee for which you wish to correct time. Evans
6.	To change the Time Reporting Code (TRC), click the **Time Reporting Code** dropdown button to activate the menu.

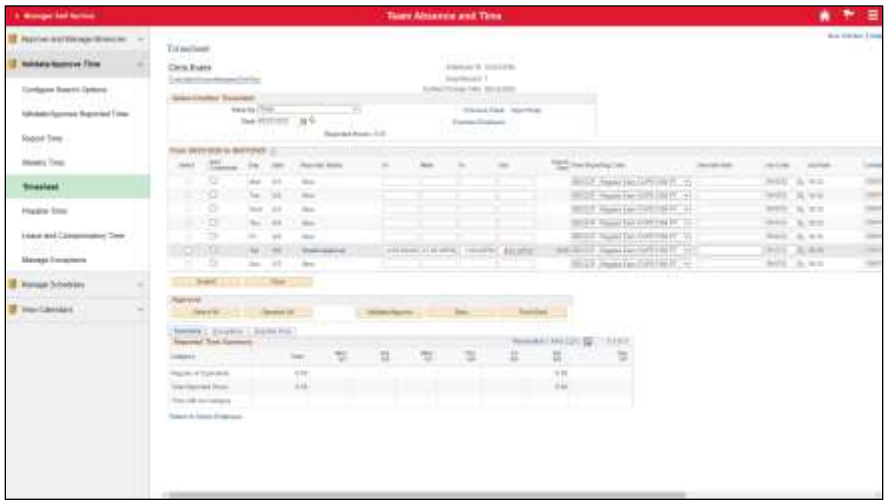


Step	Action
7.	Select the correct TRC. OTP - Overtime

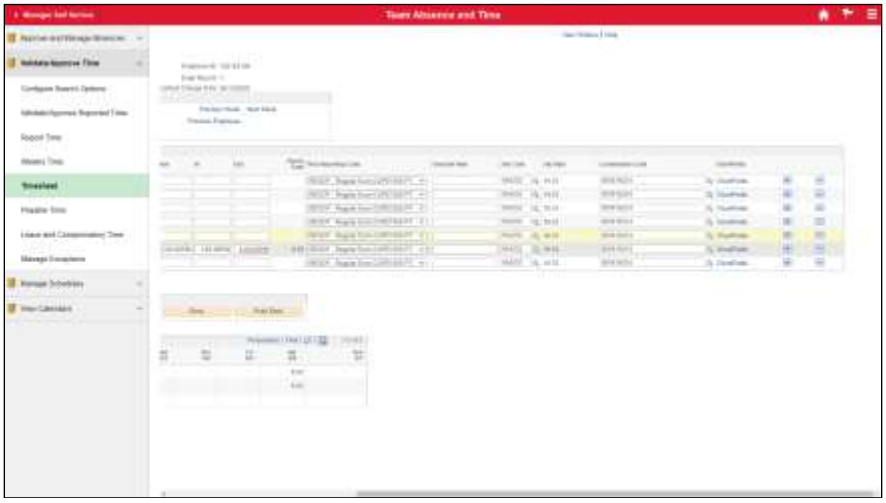


Step	Action
8.	Click the **Submit** button.
9.	A *Submit Confirmation* page appears. Click the **OK** button. 
10.	Now that you have submitted the time, you also need to approve it. Click the **Select** option.
11.	Click the **Validate/Approve** button. 
12.	A window appears asking if you are sure you want to approve the time selected. Click the **Yes** button.
13.	An *Approve Confirmation* page appears. Click the **OK** button. 
14.	The reported status displays as "Approved".

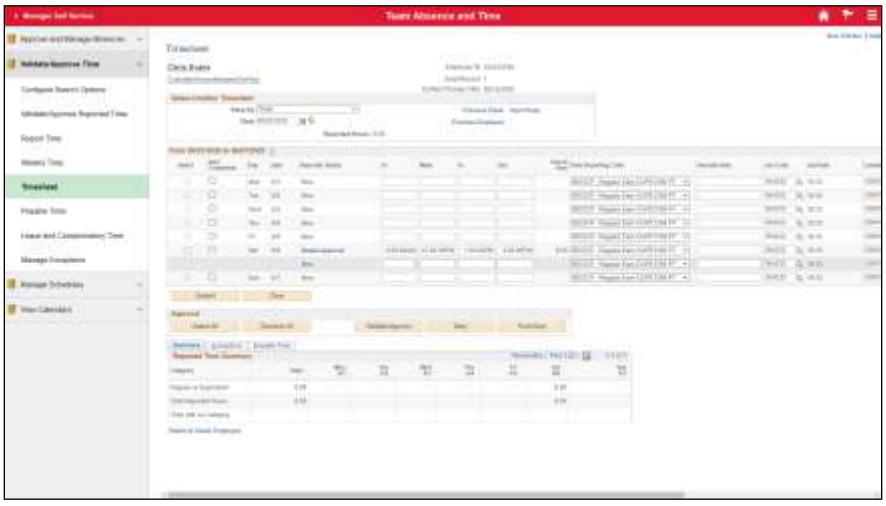
Step	Action
15.	Click the **Return to Select Employee** link to return to the previous page.
16.	Click the **Last Name** link to review the next timesheet. 
17.	To edit incorrect time entries, click in the desired field, and correct the time.
18.	Enter the desired information into the field.



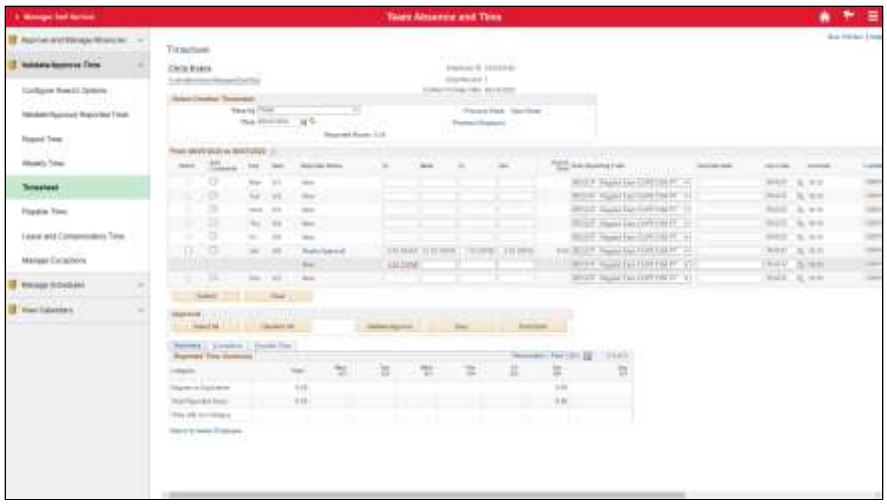
Step	Action
19.	To add time other than regular, for example, when you need to add overtime or shift premium, or to split regular time on different cost centres, add a new row. You can now specify the appropriate changes e.g. TRC, punch time, accounting information, etc. Drag the scrollbar to the far right of the page.



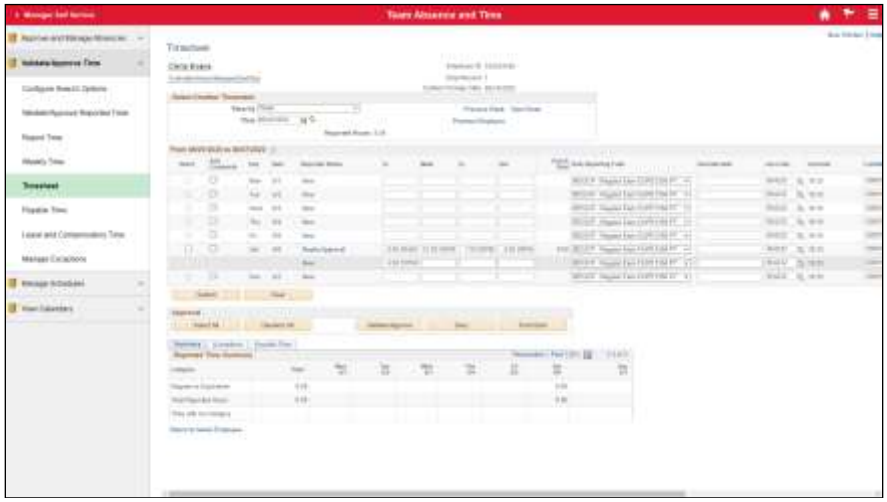
Step	Action
20.	Click the **Plus (+) Sign** button.
21.	A new row appears for the same day. Enter the appropriate time.



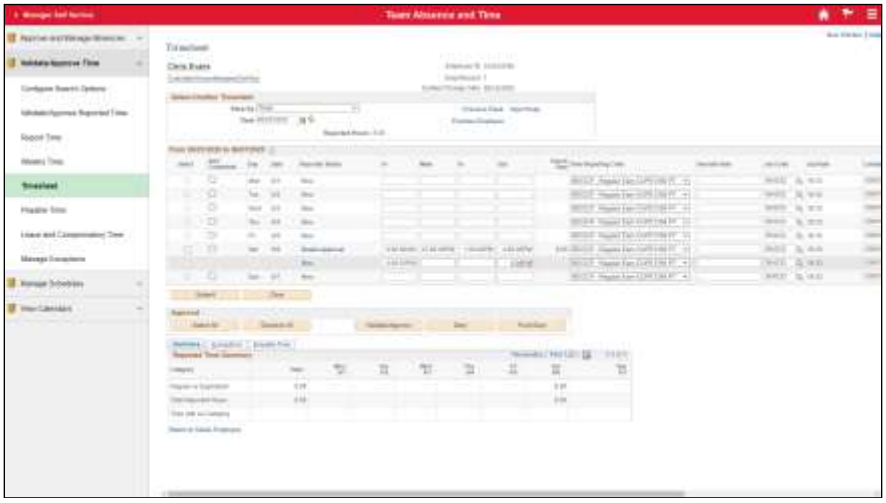
Step	Action
22.	Overlapping time is not allowed. For example, if the regular punch out time is 4 pm, and the employee starts working overtime at 4 pm, enter 4:00:01pm in the "In" field of the overtime row. Enter the desired information into the field.



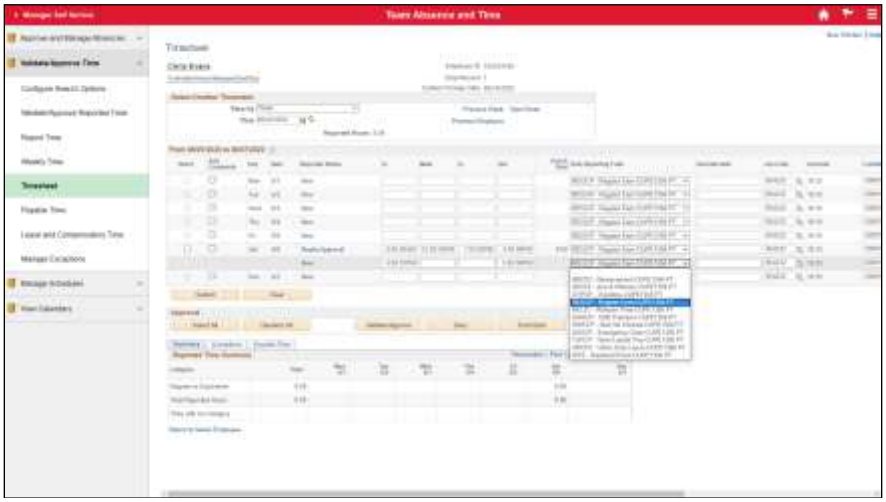
Step	Action
23.	Click in the **Out** field.



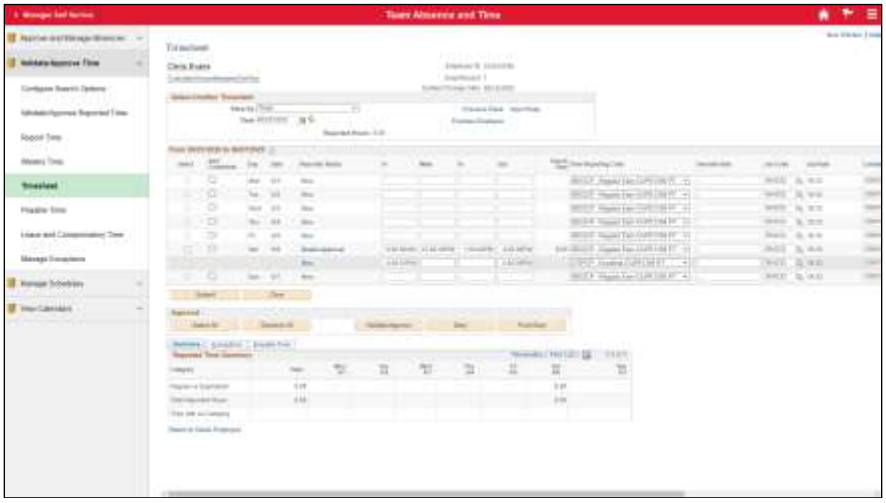
Step	Action
24.	Enter the desired information into the field.



Step	Action
25.	Click the **Time Reporting Code** dropdown button to activate the menu.



Step	Action
26.	Select an entry in the list.



Step	Action
27.	Click the **Submit** button. Submit
28.	A *Submit Confirmation* page appears. Click the **OK** button. OK
29.	Note that the **Add Comments** icon is automatically added to indicate changes made by you and is visible to the employee and reviewer (if applicable).
30.	You now need to approve the time you just corrected. Click the **Select All** button to select all time needing approval. Select All
31.	Click the **Validate/Approve** button. Validate/Approve
32.	A window appears asking if you are sure you want to approve the time selected. Click the **Yes** button. Yes
33.	An *Approve Confirmation* page appears. Click the **OK** button. OK

Step	Action
34.	If this correction was made to time reported in a previous pay period, after you approve the correction, the adjusted payable time will appear on the next paycheque. This may be additional payment or a pay reduction.
35.	**End of Procedure.**

1.4 Managing Exceptions (Time Reporting Errors)

Learning Objectives:

In this tutorial, you will learn how to determine if timesheets have "exceptions". An **Exception** is the system's warning that there may be a time reporting error. Managers should review any exceptions as they occur so any necessary corrections can be made. In some cases, an exception is not an error and may be *allowed*.

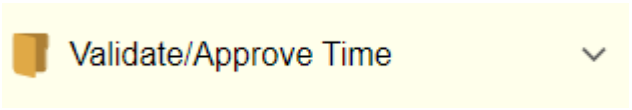
Note: Exceptions will only appear after transactions have been approved by managers and processed by the system.

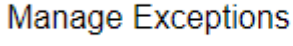
There are two methods to locate exceptions:

1. Using the **Manage Exceptions** page, and
2. By reviewing employee **Timesheets**.

Procedure

Step	Action
1.	Click the **Team Absence and Time** tile.

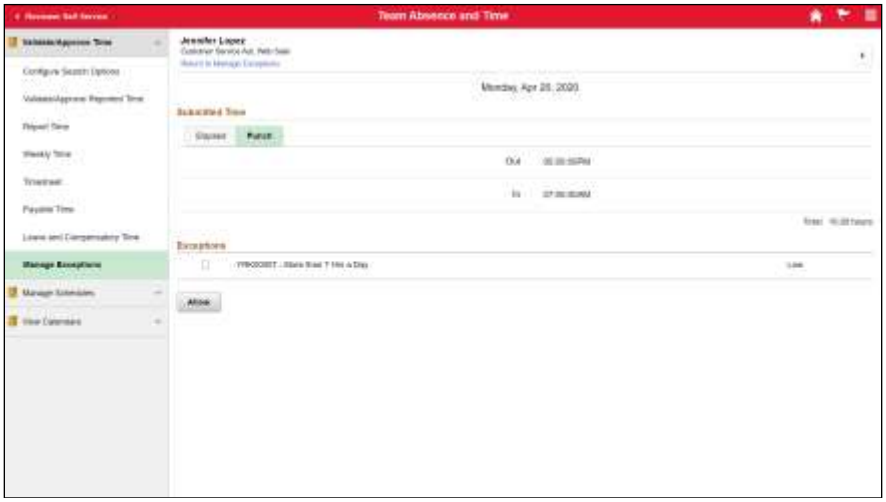
Step	Action
2.	Click the **Validate/Approve Time** menu. 

Step	Action
3.	Click the **Manage Exceptions** link. 

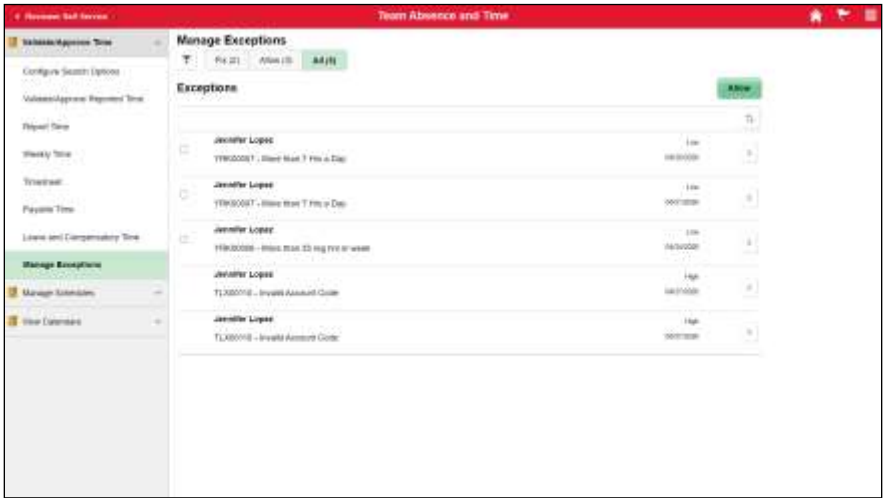
Step	Action
4.	The *Manage Exceptions* page appears and shows any outstanding exceptions that require review. The page is organized into 3 tabs. The **Fix** tab shows ***High*** severity exceptions; these require fixing to be paid. For example, an invalid account code was entered by the reviewer or manager.
5.	The **Allow** tab shows ***Low*** severity exceptions; these are warnings and may be either corrected or allowed. For example, YUSA2 employees cannot work more than 35 hours per week or 7 hours in a day. If they report more than this, and it is validated, approved, and processed, the system will generate a low exception. However, if they report 7 hours regular time plus 1-hour overtime, while the system would create an exception, you can allow this if they indeed worked the overtime. **Note:** Low severity exceptions are warnings only. If not revised, they will be submitted, approved, and paid, as is.

Step	Action
6.	The **All** tab shows all ***Low*** and ***High*** severity exceptions. Click the **All** tab. All (5)

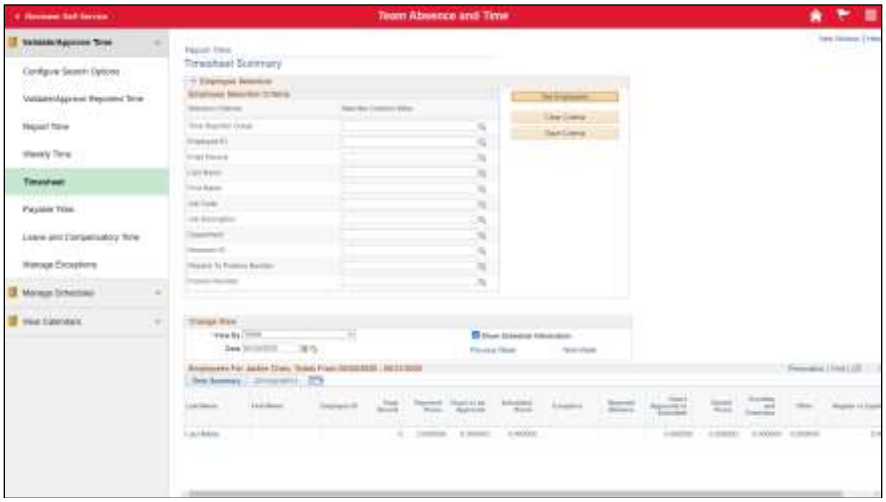
Step	Action
7.	The full list of exceptions appears. Reviewers can allow ***low*** severity exceptions only. Refer to the Time Reporting Tool (TRT) Exceptions (YULink) spreadsheet for a full list of potential exceptions, what they mean, and how to resolve them. **Important!** Reviewers can only allow low severity exceptions. Managers must correct any low severity exceptions that are indeed errors, and correct all high severity exceptions, in advance of the payroll submission deadline. Failure to do so may result in the employee not getting paid correctly.
8.	Click on the arrow associated with the exception.



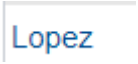
Step	Action
9.	The date of the exception appears along with the details of the submitted time. Click the **Return to Manage Exceptions** link to return to the previous page. Return to Manage Exceptions

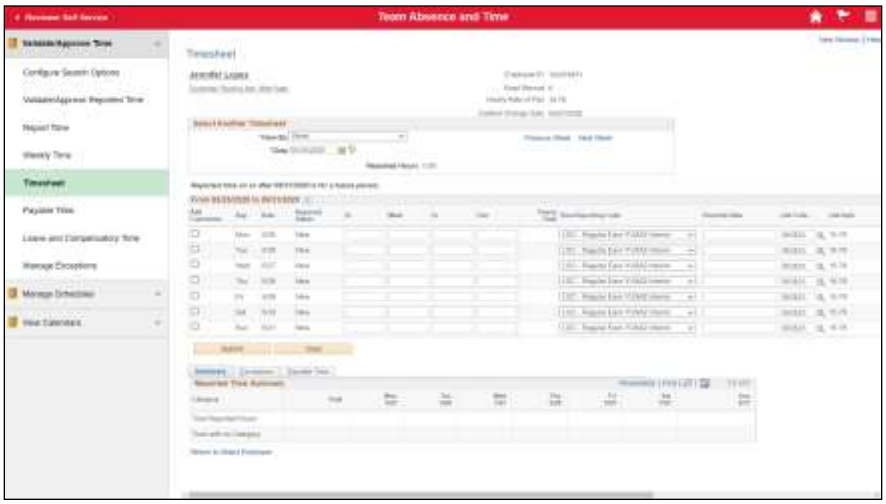


Step	Action
10.	To review the timesheet with exceptions, take note of the employee and the date of the exception, and navigate to the timesheet for that date. Click the **Timesheet** link. Timesheet

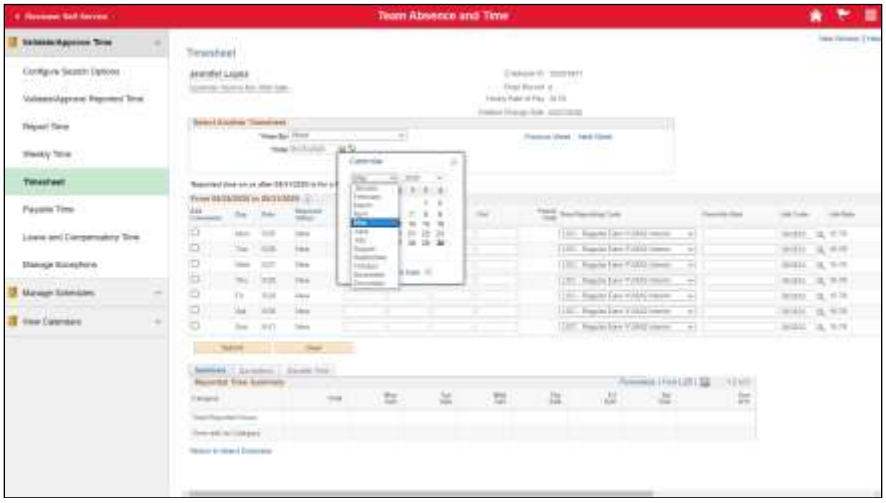


Step	Action
11.	Click the **Get Employees** button. Get Employees

Step	Action
12.	Click the **Last Name** link. 

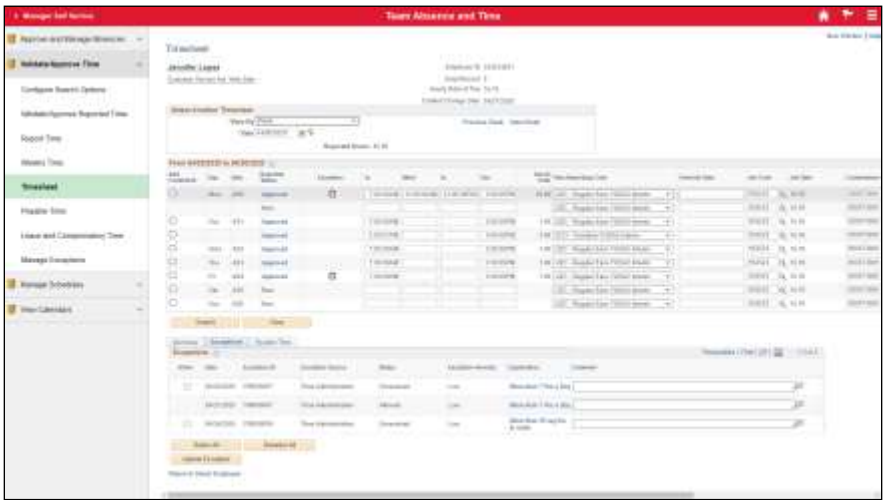


Step	Action
13.	The Timesheet defaults to the *current* week. You will need to change the date to locate the timesheet with the exceptions. Click the **Calendar** button.
14.	Click the **Month** list.

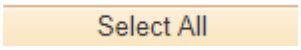
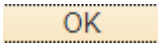
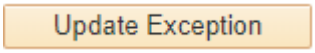
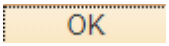
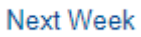


Step	Action
15.	Select the month you wish to view. April
16.	Select the date you wish to view. 20
17.	Once the date is selected, you must refresh the page. Click the **Refresh** button.
18.	In the **Exception** column, an icon appears if a timesheet has an exception. Click the **Exception** icon.
19.	The **Exceptions** tab at the bottom of the page appears, along with detailed information about the exception. •To resolve **Low** severity exceptions, the reviewer or manager can allow them if they are not errors in time reporting. •To resolve **Low** severity exceptions that *are* errors, and any **High** severity exceptions, the manager needs to review and correct them. **Note:** Corrections must be done before the payroll submission deadline for the employee to be paid correctly. Should a correction be done after the deadline, the system will recalculate the adjustment, and the employee will be paid this adjustment on the next pay.

Step	Action
20.	To correct a low severity exception, either correct the time reported by changing the punch value in the appropriate field or add a new time row where required.
21.	Enter the appropriate punch values to correct the time. To create the overtime row, scroll to the far right of the page and click the **Plus Sign (+)** icon associated with the same date.



Step	Action
22.	A new row appears. Click the **Time Reporting Code** dropdown button to activate the menu.
23.	Select the appropriate TRC.
24.	Enter the appropriate punch times.
25.	Once you have corrected the time, click the **Submit** button.
26.	A *Submit Confirmation* page appears. Click the **OK** button.

Step	Action
27.	You now need to approve the corrected time. Click the **Select All** button. 
28.	Click the **Validate/Approve** button.
29.	Click the **Yes** button.
30.	Click the **OK** button. 
31.	To resolve the exception once the time has been corrected and approved, click the **Allow** option associated with the exceptions you just corrected.
32.	Click the **Update Exception** button. 
33.	Click the **OK** button. 
34.	The **Exception** icon in the *Exception* column disappears, and the **Status** in the ***Exceptions*** section displays as “Allowed”.
35.	Continue to review exceptions, if applicable. Click the **Next Week** link. 
36.	**Note:** For casual jobs, high exceptions are listed per punch. Therefore, you will have multiple exception rows for the same error. Fixing the error will automatically clear them all.
37.	If you need to correct the accounting information, click the **ChartFields** link. Refer to the “Approving Reporting Time” topic for more information. Again, once you have made the corrections, click the **Submit** button, follow the prompts to confirm, then select the newly corrected rows, and approve them.
38.	**Note:** The Exception will not be cleared from the *Timesheet* until the nightly HR processing occurs.

Step	Action
39.	**End of Procedure.**

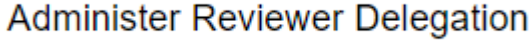
1.5 Reassigning Reviewers

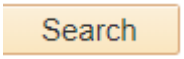
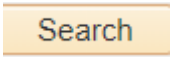
If there is a reviewer in your workflow, and your reviewer will be absent, e.g. on vacation, this role must be delegated by you as the manager, to someone else or yourself.

Learning Objectives

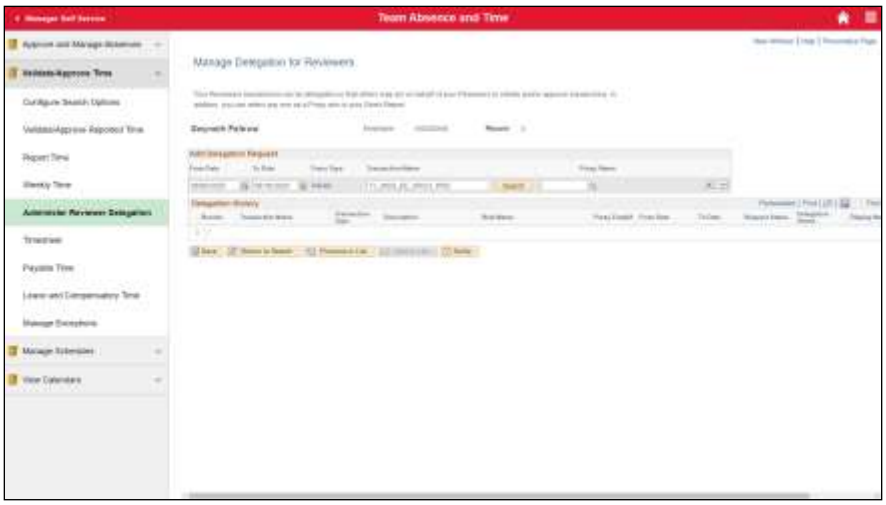
In this tutorial, you will learn how to reassign the reviewer role when your regular reviewer is away. You are a manager and you will reassign your reviewer to another employee on your team.

Procedure

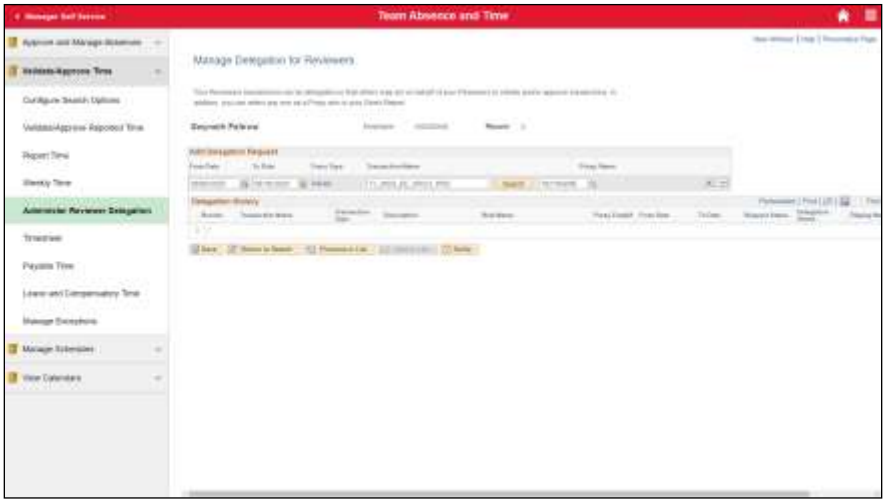
Step	Action
1.	Click the **Team Absence and Time** tile.
2.	Click the **Validate/Approve Time** menu.
3.	Click the **Administer Reviewer Delegation** link. 

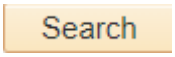
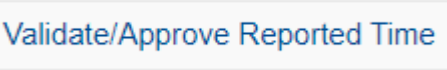
Step	Action
4.	Click the **Search** button. 
5.	A list of your existing reviewers will display. Click the **Name** link of the reviewer who will be absent.
6.	The *Manager Delegation for Reviewers* page appears. Select the date from which the delegation will begin. In the *Add Delegation Request* section, click the **Calendar** icon in the **From Date** field.
7.	Click the date the delegation will begin. **Note:** The delegation start date must the current date or future-dated. Click the **Date** link.
8.	Enter the end date of the delegation in the **To Date** field. If it is an indefinite delegation, leave this field blank. Click the **Calendar** icon.
9.	Click the **Date** link.
10.	Next, select the transactions you wish to delegate. In the *Transaction Name* section, click the **Search** button. 
11.	First, select the **Manage Reported Time** transaction. This gives the proxy the ability to enter time on behalf of an employee and/or correct the time on the timesheet. Click the **Manage Reported Time** link.

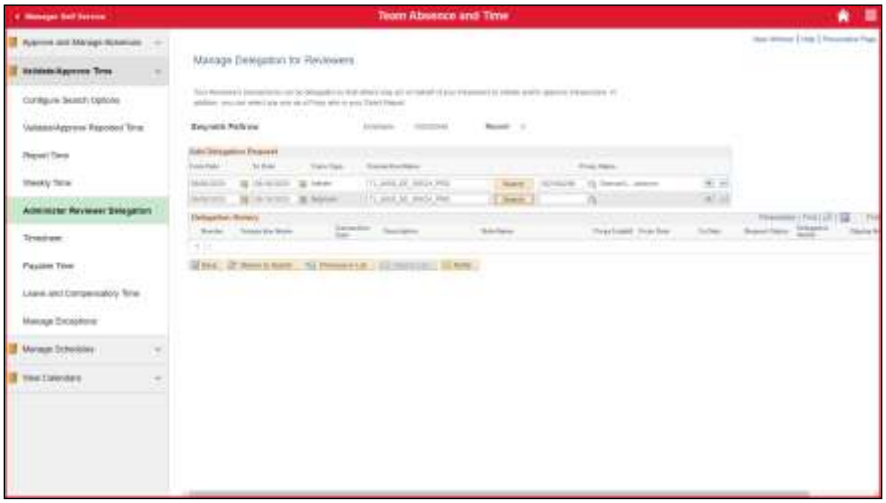
Step	Action
12.	Then, enter the *Employee ID* for the Proxy. This could be an existing reviewer, another employee (non-reviewer), or yourself. If you don't know the employee ID, click the Magnifying glass to search by name, and select the corresponding employee ID. Click in the **Proxy** field.



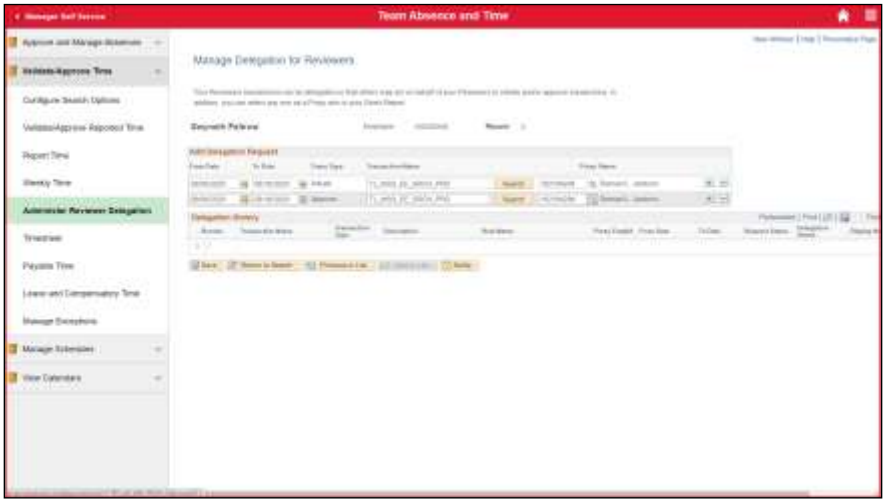
Step	Action
13.	Enter the desired information into the field. Enter "**102104294**".



Step	Action
14.	Then, repeat this process for the next transaction. Click the **Plus Sign** button.
15.	A new row appears. Click in the **From Date** field to enter the same date as the previous transaction.
16.	Click in the **To Date** field to enter the same date as the previous transaction.
17.	Click the **Search** button. 
18.	Click the **Validate/Approve Reported Time** link. This gives the proxy the ability to validate reported time. **Note:** You are only delegating the reviewer for validation. All time will still be directed to you after validation for approval. 



Step	Action
19.	Enter the Employee ID of the proxy into the Proxy field. Enter "**102104294**".
20.	Press the **[Tab]** key on your keyboard to display the proxy's name.



Step	Action
21.	Click the **Save** button. The proxy will receive an email containing a hyperlink to review and accept the delegations. After the proxy accepts, the system will grant access to the proxy on the date entered in the From Date field.
22.	**End of Procedure.**

1.6 Revoking Delegated Reviewers

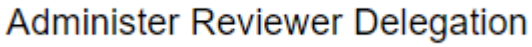
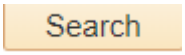
Learning Objectives

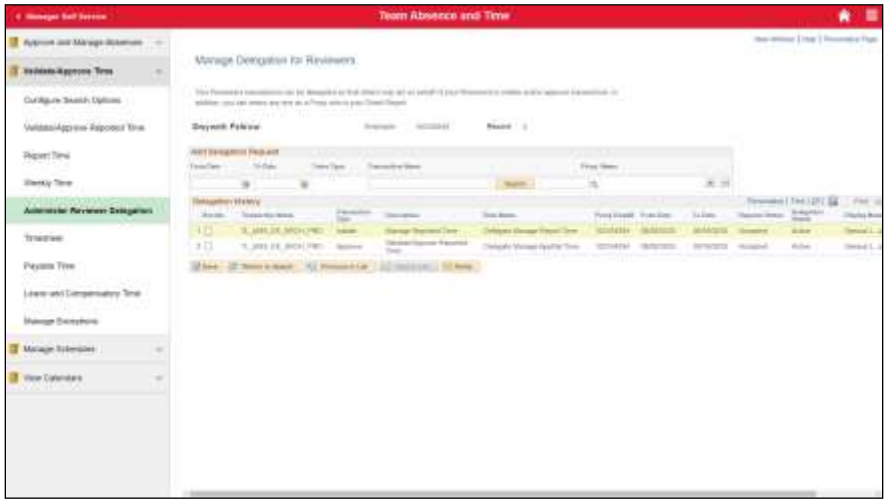
In this tutorial, you will learn how to revoke a delegation for your reviewer.

You had delegated your reviewer's transactions for Time Validation. However, plans have changed, and your reviewer is returning earlier than expected. As such, you need to cancel or "revoke" the delegation request.

Procedure

Step	Action
1.	Click the **Team Absence and Time** tile.
2.	Click the **Validate/Approve Time** menu bar.

Step	Action
3.	Click the **Administer Reviewer Delegation** link. 
4.	Click the **Search** button. 
5.	Select the original reviewer, the one for which you wish to reactivate validation responsibility. Click the **Name** link.



Step	Action
6.	In the **Delegation History** section, click the *Revoke* **Checkbox** to select it.
7.	Click the second **Checkbox**.
8.	Click the **Save** button. The proxy will lose access to these transactions immediately and the original reviewer will once again have access to validate reported time.

Step	Action
9.	**End of Procedure.**

2. Managing and Approving Absences

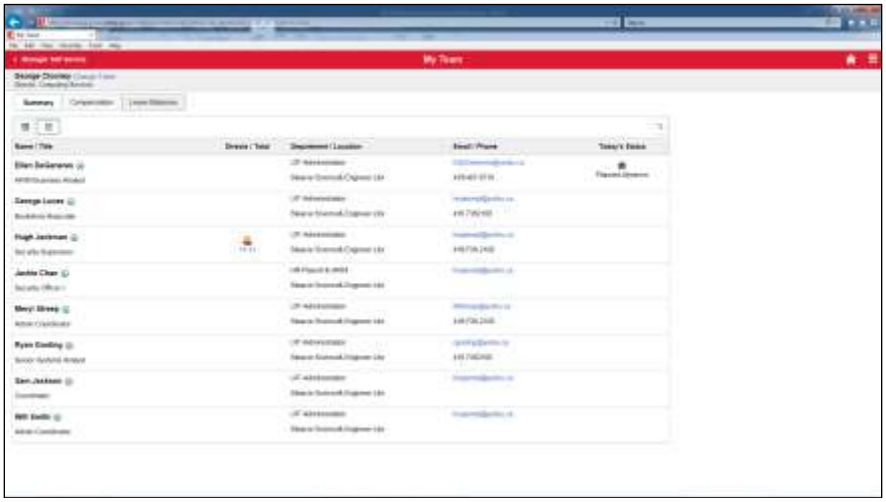
2.1 Viewing Absence Balances of Employees

Learning Objectives:

In this tutorial, you will learn how to view Absence Balances from two locations:
- My Team
- Team Absence and Time

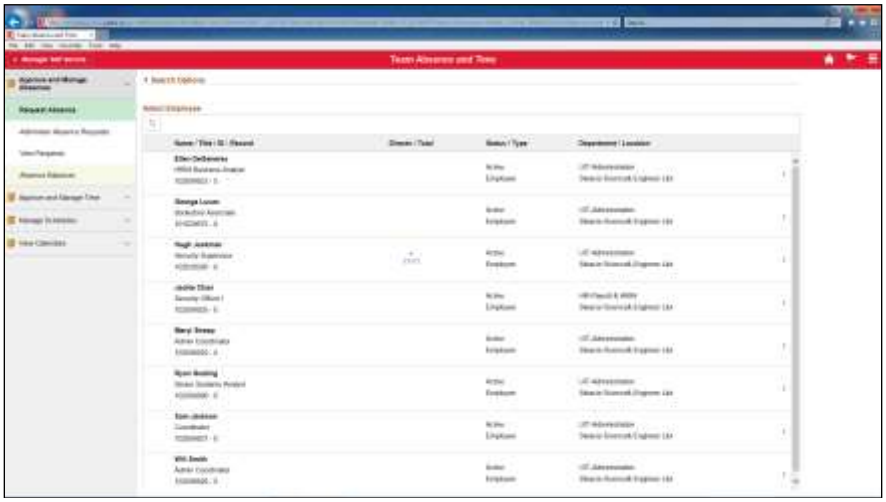
Procedure

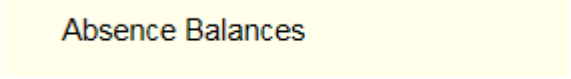
Step	Action
1.	Click the **My Team** tile.
2.	The list of employees on your team appear. Note that there is a link to view 11 employees reporting to Hugh Jackman.



Step	Action
3.	**Leave Balances** is another term for **Absence Balances.** to view the Absence (i.e. Leave) balances, click the **Leave Balances** button. Leave Balances
4.	The list of employees and their Absence Balances appears. Note that the values are as of the **last pay processing date.** Employees may have taken additional absences. For example, they may have: - requested and taken additional absences that have not yet been processed. - requested but not taken additional approved absences.
5.	Now, you wish to navigate to the Team Absence and Time tile to look at Absence Balances and forecast these. Click the **Manager Self Service** button. Manager Self Service

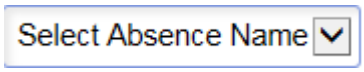
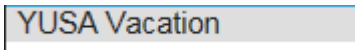
Step	Action
6.	Click the **Team Absence and Time** tile.



Step	Action
7.	Click the **Absence Balances** link. 

Step	Action
8.	An employee may have more than one role. For this reason, to find information about Absence Balances, you select the role. In this scenario, each employee only has one single role. For Will Smith, you will need to select his role of Admin Coordinator. Click the **Role** link. Admin Coordinator
9.	A summary of the employee's absence balances appears; note that these balances are as of the last pay date 01/31/2018. Additionally,the Vacation Accrual Rate appears as well as the date that it will change.

Step	Action
10.	You wish to view the Forecast Balance for Will Smith. Click the **Forecast Balance** link.
11.	In this scenario, wish to forecast the vacation balance as of December 31, 2018. Enter **12/31/2018** into the **As of Date** field.
12.	Click the **Filter by Type** list. All

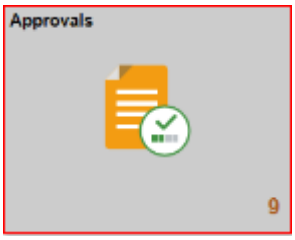
Step	Action
13.	Click the **Vacations** list item.
14.	Click the **Absence Name** list. 
15.	Click the **YUSA Vacation** list item. 
16.	Click the **Forecast Balance** button.
17.	In this scenario, Will Smith has a forecast of 11.00 vacation days. This is less than the current 20.86 days because: It includes: - absences approved but not yet taken, - absences submitted but not yet approved, and - absences approved but not yet processed. (An example would be a summer vacation.) But does not include: - the vacation entitlement for December, 2018 itself, To include December, the forecast **As of Date**, would need to be January 1, 2019. Click the **Close (x)** button.
18.	You have completed this tutorial. **End of Procedure.**

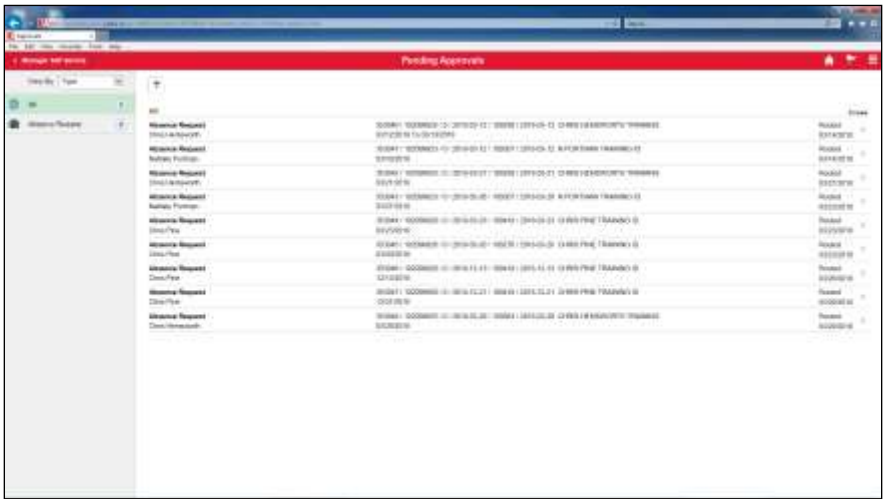
2.2 Reviewing and Approving Absences

Learning Objectives:

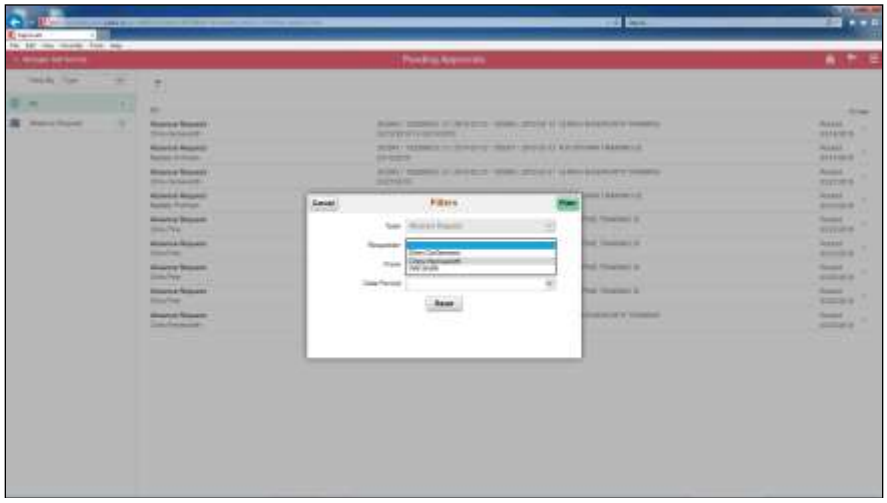
In this tutorial, you will learn how to:
- **approve** an absence request
- **push back** an absence and ask for a change, and
- **deny** an absence request.

Procedure

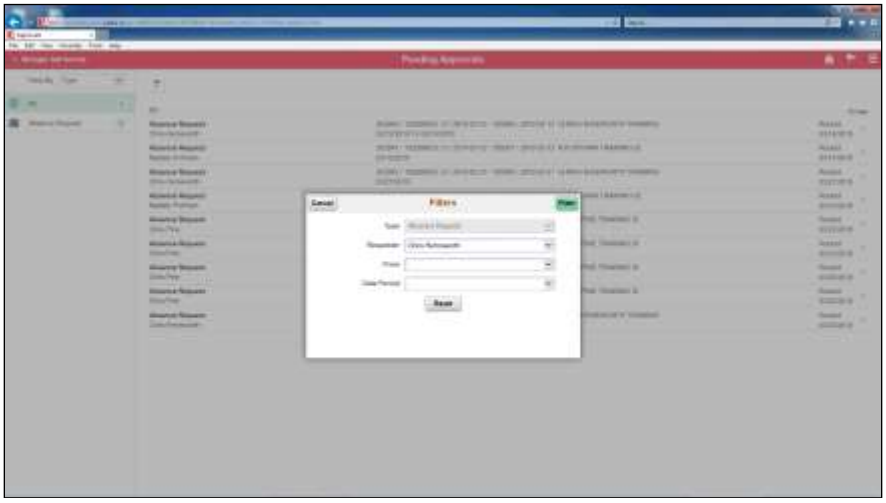
Step	Action
1.	Absence Approvals can be done through the Approvals tile. Note that the tile indicates the number of remaining Approvals pending review and action. Click the **Approvals** tile 

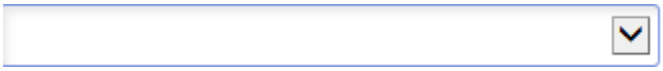


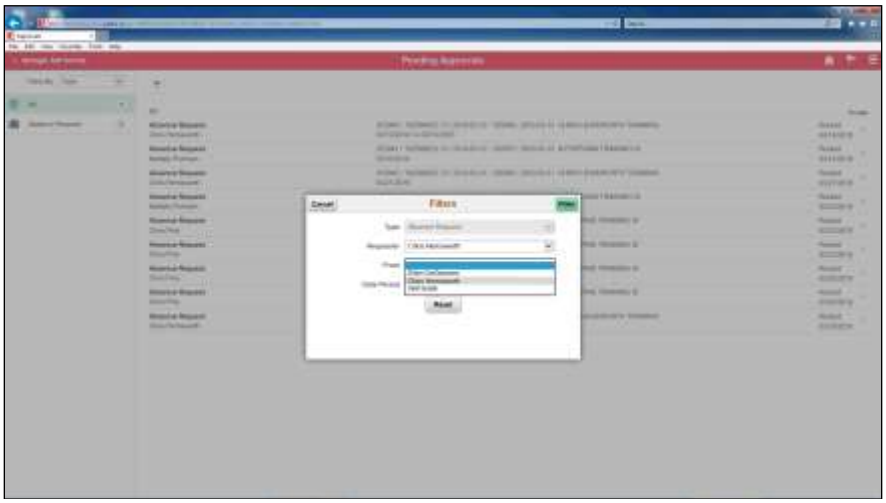
Step	Action
2.	To locate a specific request, you can filter based on a timeframe or requestor. The first absence request that you wish to locate is from **Chris Hemsworth** in the **last two weeks.** Click the **Filter** button.
3.	Click the **Requester** list.

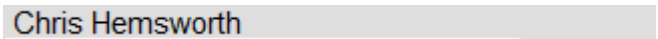


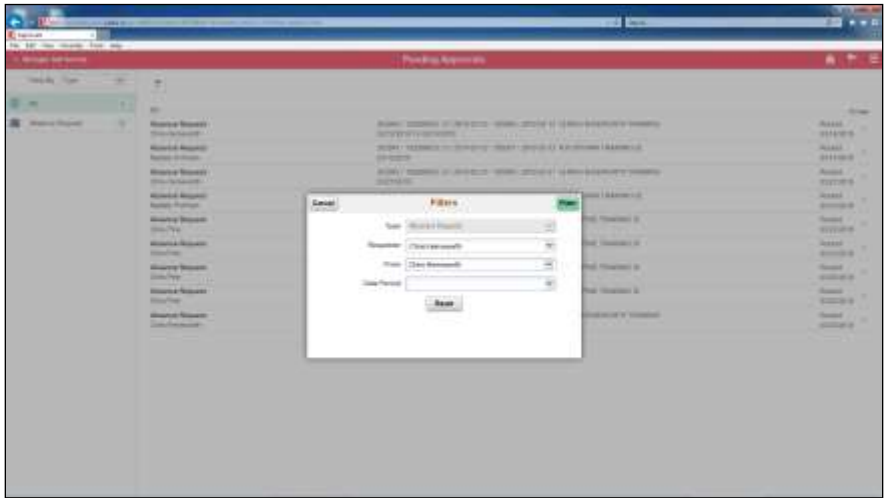
Step	Action
4.	Click the **Chris Hemsworth** list item.

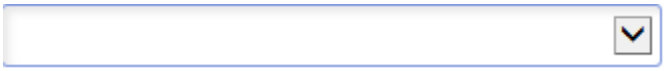


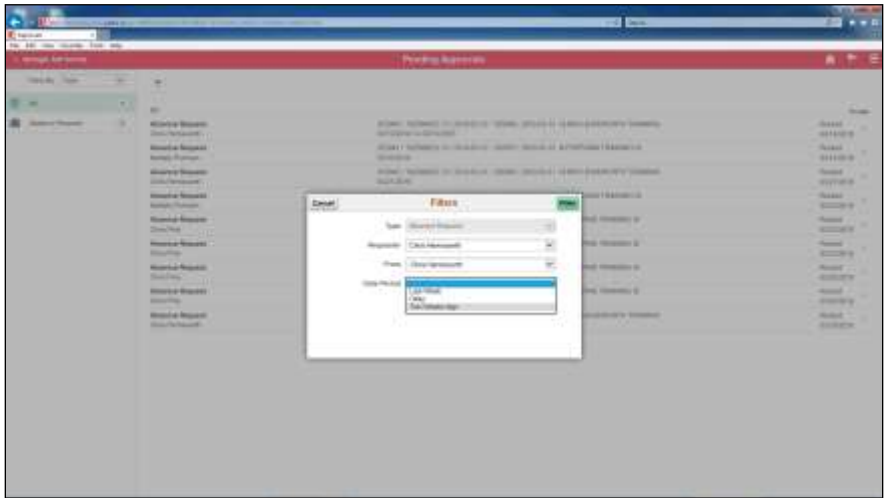
Step	Action
5.	Click the **From** list. 



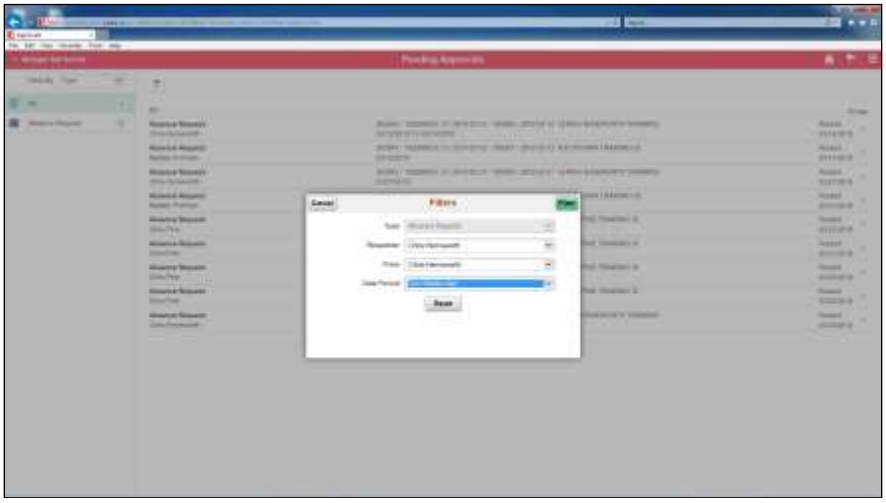
Step	Action
6.	Click the **Chris Hemsworth** list item. 

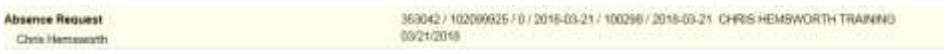


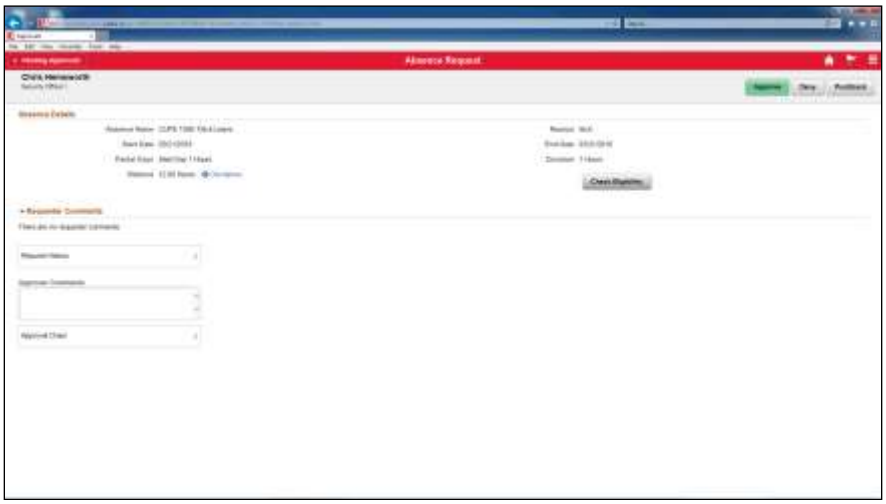
Step	Action
7.	Click the **Date Period** list. 



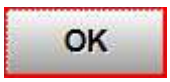
Step	Action
8.	Click the **Two Weeks Ago** list item.

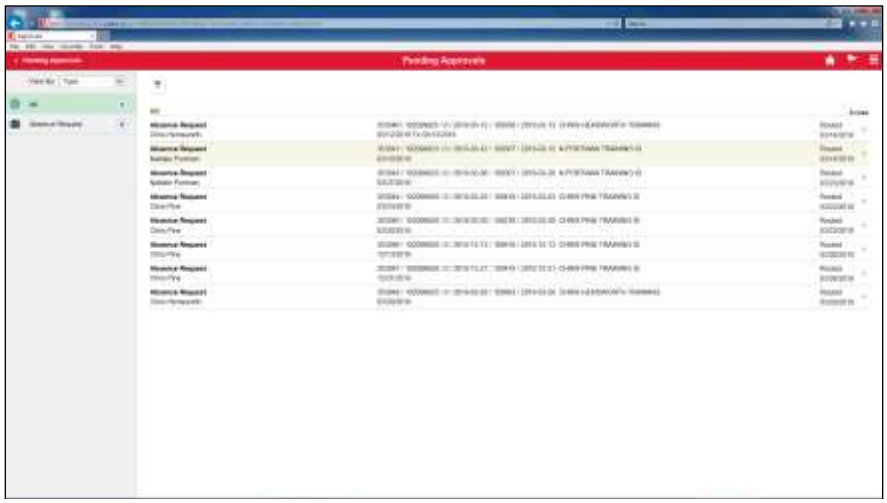


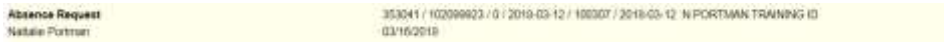
Step	Action
9.	Click the **Filter** button.
10.	Click the **Absence Request Detail** link. 

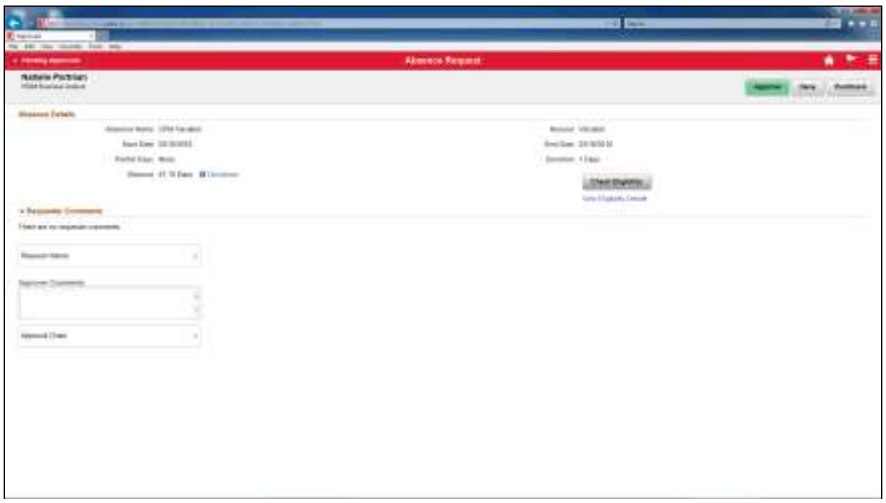


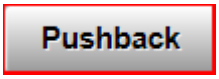
Step	Action
11.	Click the **Check Eligibility** button.

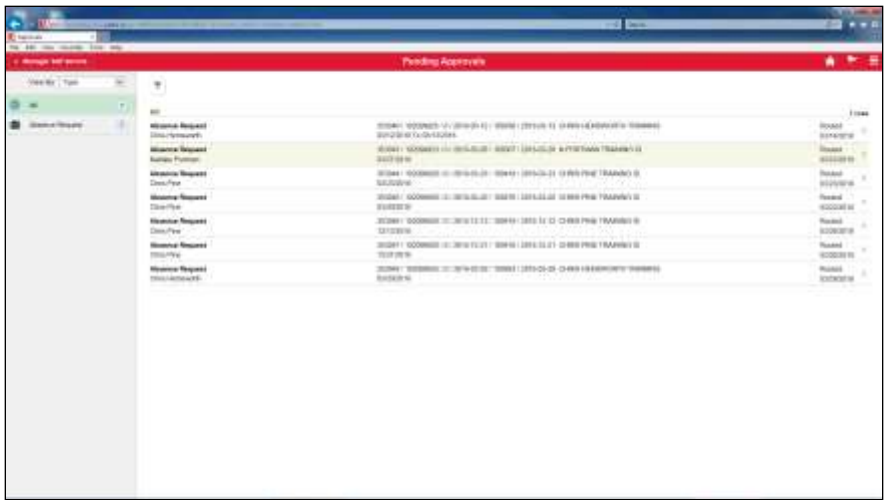
Step	Action
12.	Click the **OK** button.
13.	Click the **View Eligibility Details** link.
14.	Click the **Close** button.
15.	Click the **Approve** button.
16.	Click the **OK** button. 
17.	Click the **Submit** button.
18.	A message appears indicating that you have approved the request.



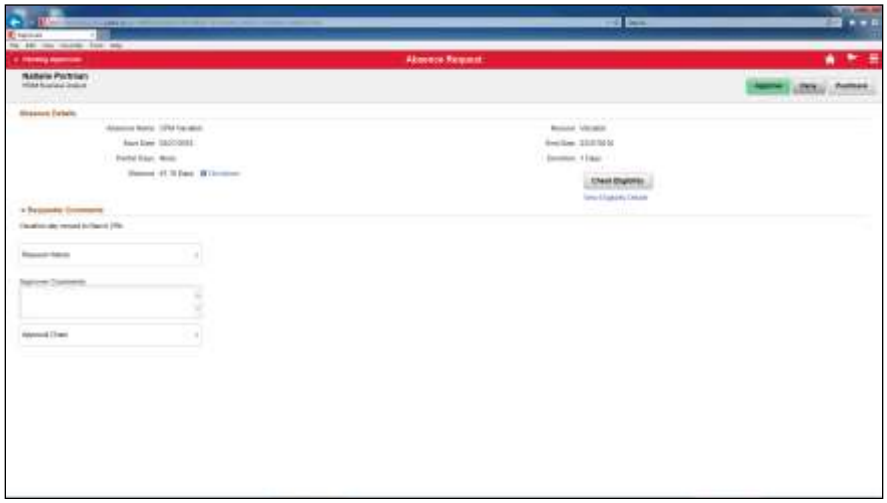
Step	Action
19.	You will now push back **Natalie Portman's** request for vacation due to a scheduling conflict, Click the **Absence Request Detail** link. 

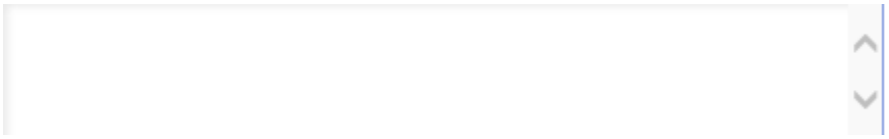


Step	Action
20.	You will ask Natalie to change the vacation date. However, you first want to check that she has the entitlement. Click the **Check Eligibility** button.
21.	Click the **OK** button.
22.	Click the **Pushback** button. 
23.	You can add a comment.
24.	Click the **Submit** button.
25.	A message appears indicating that you have requested a change to (i.e. pushed back) the vacation request.



Step	Action
26.	There is another vacation request from Natalie for March 26. Unfortunately, there is a critical staff meeting scheduled on this date. You will deny the request. Click the **Absence Request Detail** link. **Absence Request** 303043 / 102099923 / 0 / 2018-03-26 / 100307 / 2018-03-26 N PORTMAN TRAINING ID Natalie Portman 03/27/2018



Step	Action
27.	Click the **Deny** button.
28.	Enter the desired information into the **Approver Comments** field. In this scenario, enter "**We have a staff meeting.**" or press <Enter>. 
29.	Click the **Submit** button.
30.	A message appears indicating that you have denied the vacation request.
31.	You have completed this tutorial. **End of Procedure.**

2.3 Requesting a Change to an Absence Request

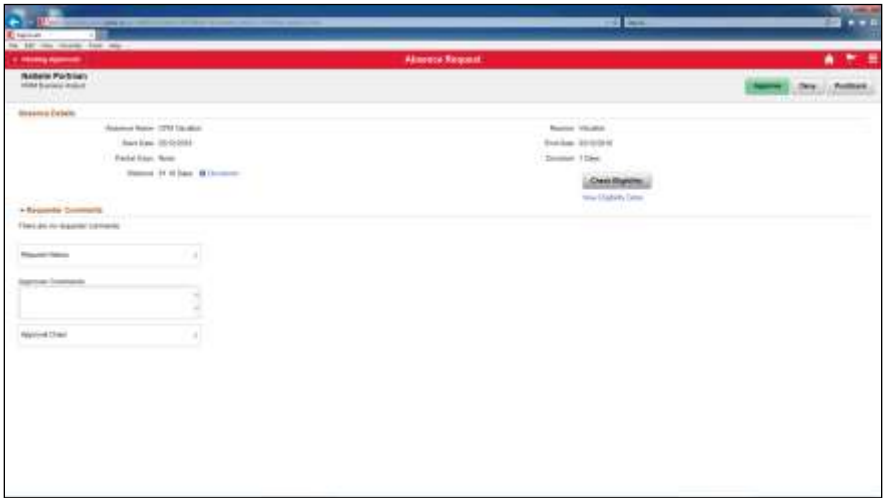
Learning Objectives:

In this tutorial, you will learn how to:
- ask for a change to (i.e. Push back) an absence request, and
- provide comments on the push back.

Procedure

Step	Action
1.	Absence Approvals are done through the Approvals tile. Click the **Approvals** tile.

Step	Action
2.	A list of pending approvals appears. You wish to push back Natalie Portman's vacation request for March 12. Click the **Absence Request Detail** link.



Step	Action
3.	You will ask Natalie to change the vacation date. However, you first want to check that she is eligible. Click the **Check Eligibility** button. Check Eligibility
4.	Click the **OK** button. OK
5.	At the time, Natalie is eligible for the vacation. However, there is a scheduling conflict with other vacations. You would like to ask her to schedule the vacation day at another time. Click the **Pushback** button. Pushback
6.	You can enter a comment on the **Pushback.**
7.	Click the **Submit** button. Submit
8.	A message appears indicating that the request has been pushed back. Note that the request no longer appears in the list of Pending Approvals.
9.	You have completed this tutorial. **End of Procedure.**

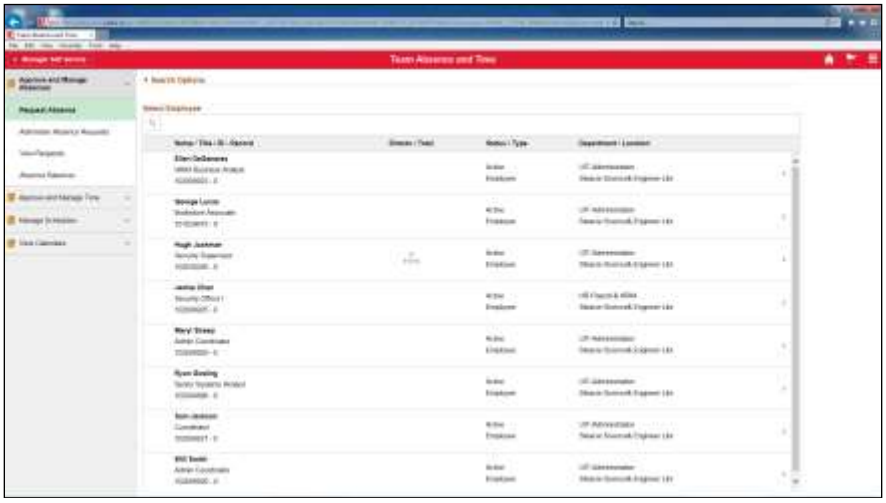
2.4 Reporting Absences on Behalf of an Employee

Learning Objectives:

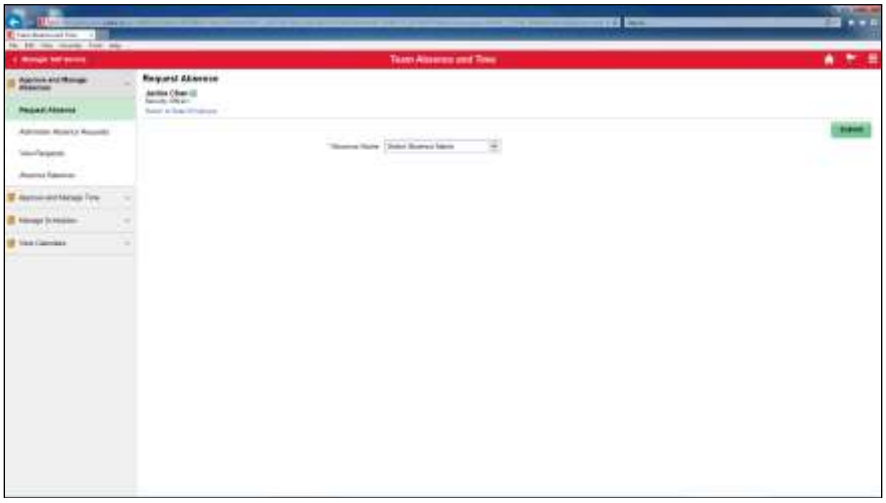
In this tutorial, you will learn how to report an absence on behalf of an employee.

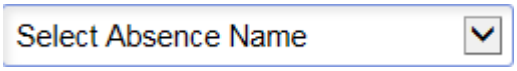
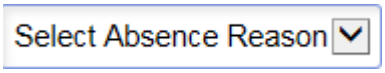
Procedure

Step	Action
1.	Absence management is done through the Team Absence and Time tile. Click the **Team Absence and Time** tile.



Step	Action
2.	The Team Absence and Time page is displayed. Request Absence enables you to request an absence on behalf of an employee. Note: Any requests for yourself should be made through Employee Self Serve, as an employee. Click the **Request Absence** link. Request Absence
3.	You wish to make a request on behalf of Jackie Chan. Click the **Job Detail** link. Security Officer I



Step	Action
4.	Click the **Absence Name** list. 
5.	Click the **CUPE 1356-1 Sick Leave** list item.
6.	Click the **Reason** list. 
7.	Click the **Sick** list item.
8.	The absence was for one day, April 3. You can enter the date directly or use the calendar. You chose to use the Calendar. Click the **Calendar** button.
9.	Click the **April 3** button.
10.	Click the **Check Eligibility** button.
11.	Click the **OK** button.
12.	As a **Manager** or **Timekeeper,** you should report the time on behalf of the **Employee.** Leave the **Request As** field set to **Employee**.
13.	Click the **Submit** button.
14.	Click the **Yes** button.

Step	Action
15.	A message appears indicating that the Submission was Successful. NOTE: The **Status** of the request is **Approved**. This is because, as the manager, when you submit a request on behalf of an employee, the request is automatically approved.
16.	You have completed this tutorial. **End of Procedure.**

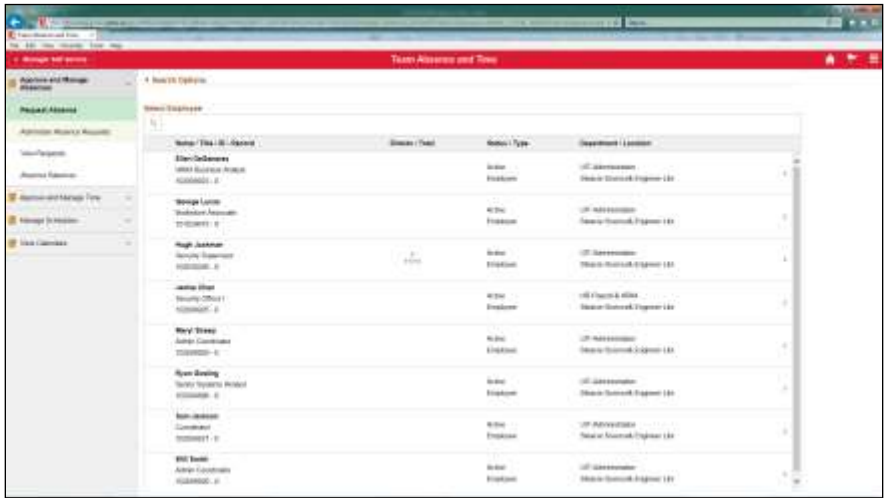
2.5 Removing Absences (Before Absence Processing)

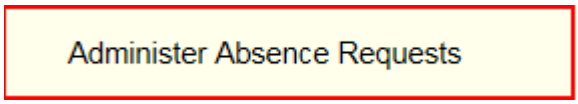
Learning Objectives:

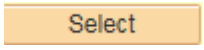
In this tutorial, you will learn how to remove an absence request that was approved. Note that this can only be done for absences prior to the absence processing; these absences have not yet been processed. Absence processing happens weekly usually on a Monday, unless Monday is a holiday, in which case, processing occurs on the next business day after Monday.

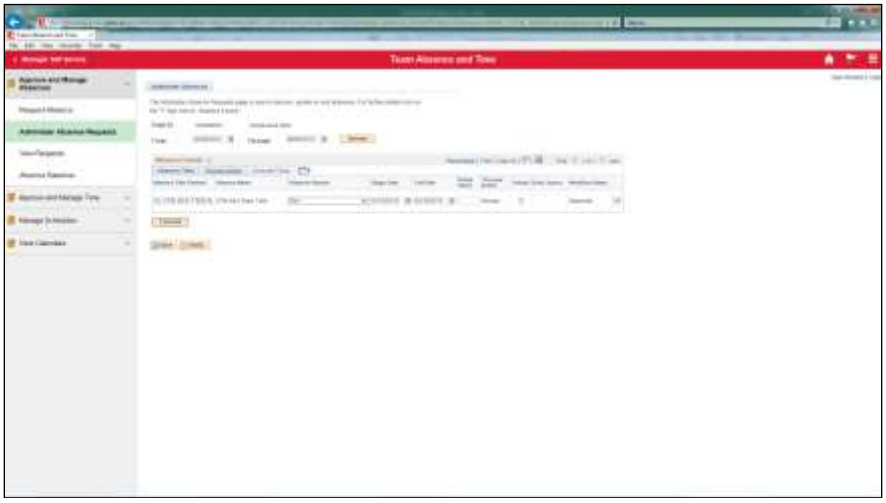
Procedure

Step	Action
1.	Click the **Team Absence and Time** tile.

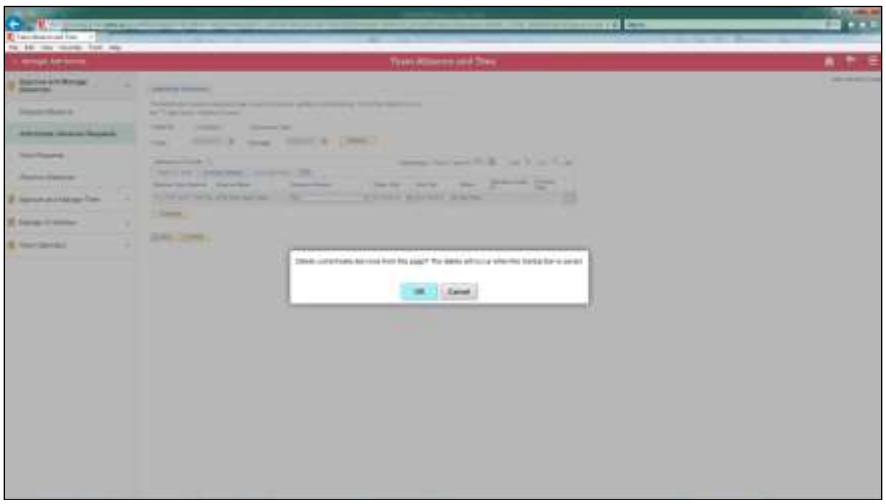


Step	Action
2.	Click the **Administer Absence Requests** link. 

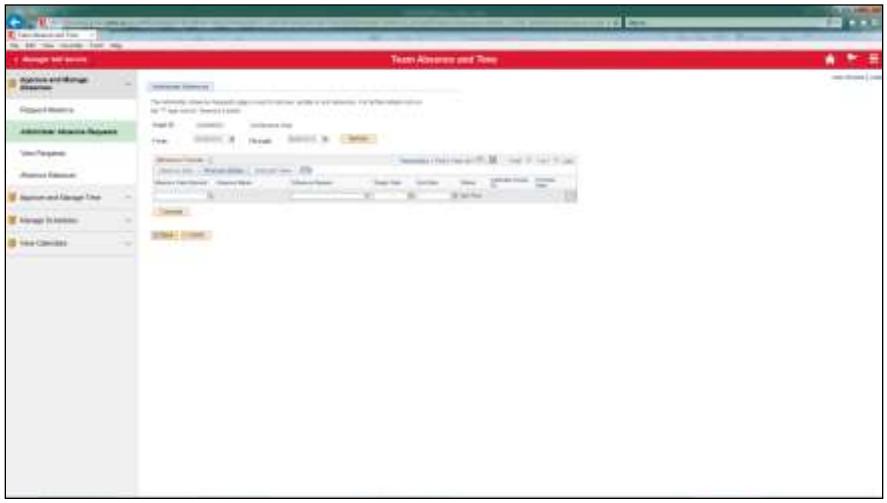
Step	Action
3.	Click the **Select** button. 



Step	Action
4.	You will need to check that the Absence has not yet been processed. Click the **Process Status** tab. Process Status
5.	Note that the process is "Not Proc.". The approved request can be removed. Click the **Delete** button.



Step	Action
6.	Click the **OK** button.



Step	Action
7.	The change needs to be saved in order to be made permanent. Click the **Save** button.
8.	You have completed this tutorial. **End of Procedure.**

2.6 Voiding Absences (After Absence Processing)

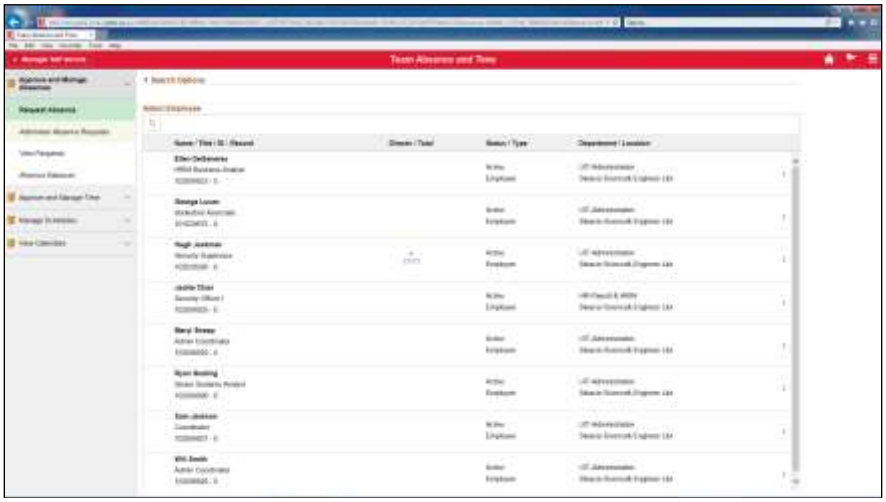
Learning Objectives:

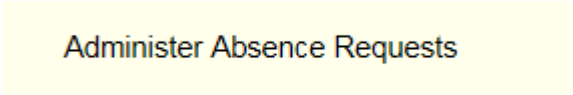
In this tutorial, you will learn how to void a vacation request.

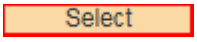
Note: If a request to report or change an absence is older than 60 Days, the manager must contact **hrhelp@yorku.ca**.

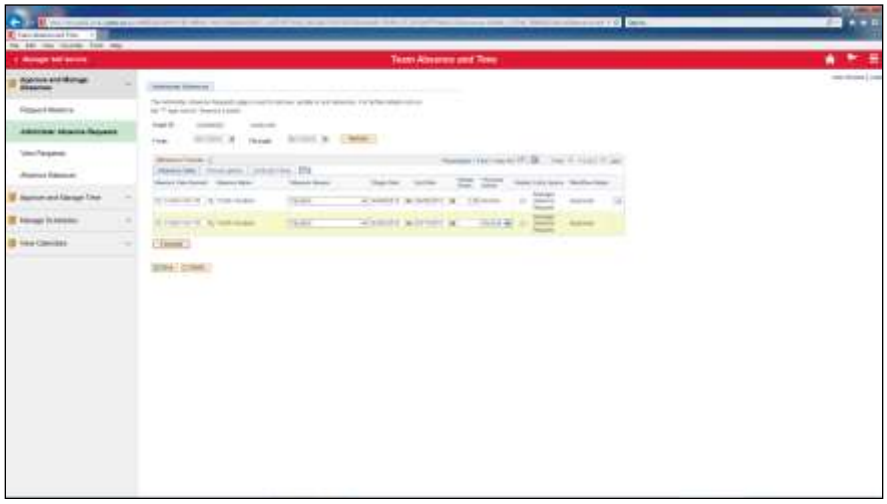
Procedure

Step	Action
1.	Click the **Team Absence and Time** tile.

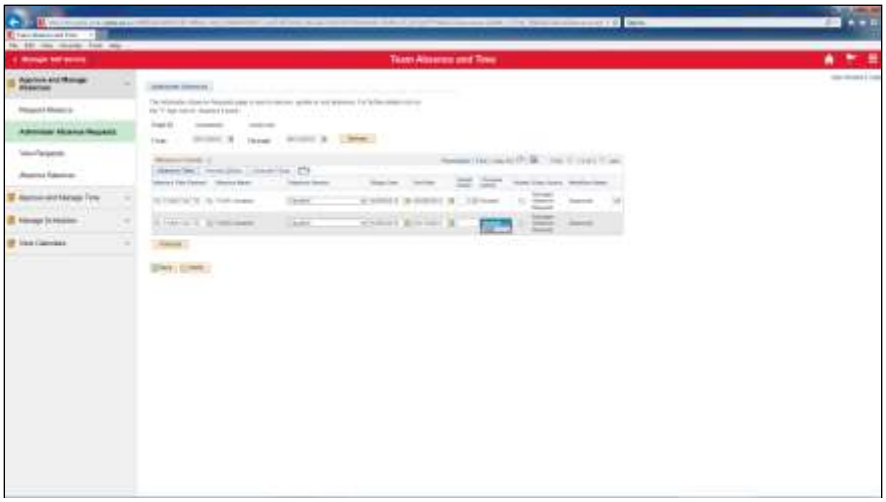


Step	Action
2.	Click the **Administer Absence Requests** link. 

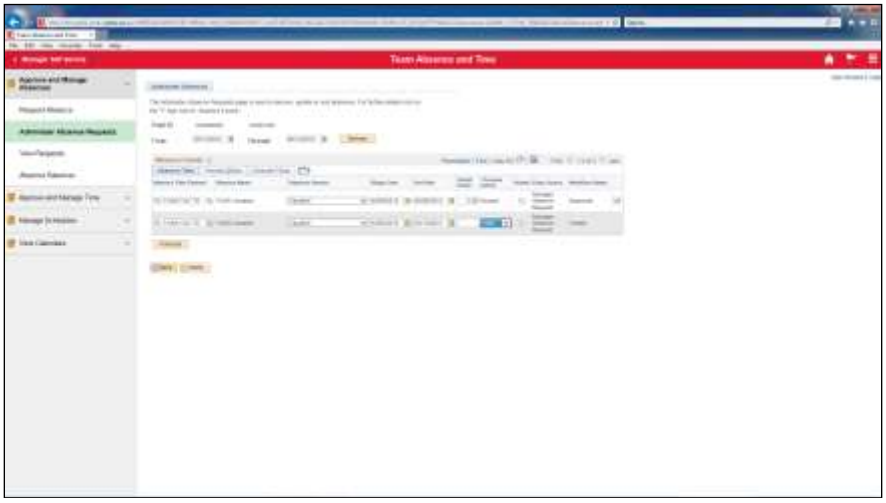
Step	Action
3.	Click the **Select** button. 



Step	Action
4.	There are two vacation requests. One request, for June 4, 2018, has a '-' at the end of the row. This indicates that the absence has not been processed. The second request is for March 5-13. There is no '-' at the end of the row. This means that the absence has been processed. An absence cannot be deleted once it has been processed. However, if it is less than 60 days since the absence, it can be voided. Only some absences older than 60 days may be modified. To check, contact hrhelp@yorku.ca. Click the **Process Action** list. Normal



Step	Action
5.	If an Absence: - has been processed, - but has not reached 60 days, an option to void will appear. Click the **Void** list item. Void



Step	Action
6.	Note: Employees are not notified when you void an absence request. (York University does not support the Notify button functionality.) To notify your employee that you have voided the approved request, contact him/her directly. Click the **Save** button. Save
7.	You have completed this tutorial. **End of Procedure.**

3. Calendars And Schedules

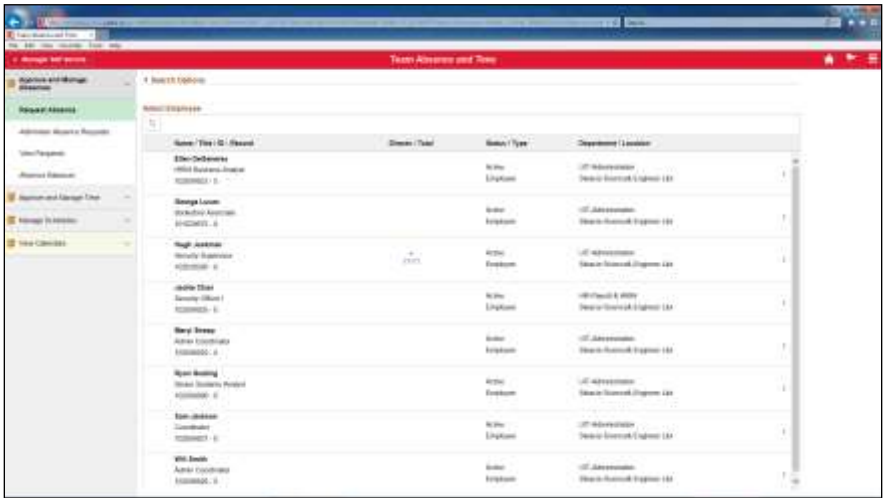
3.1 Viewing Calendars for Employees

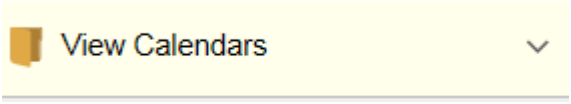
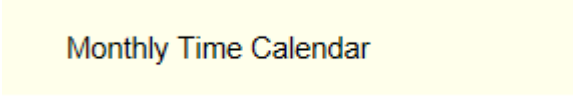
Learning Objectives:

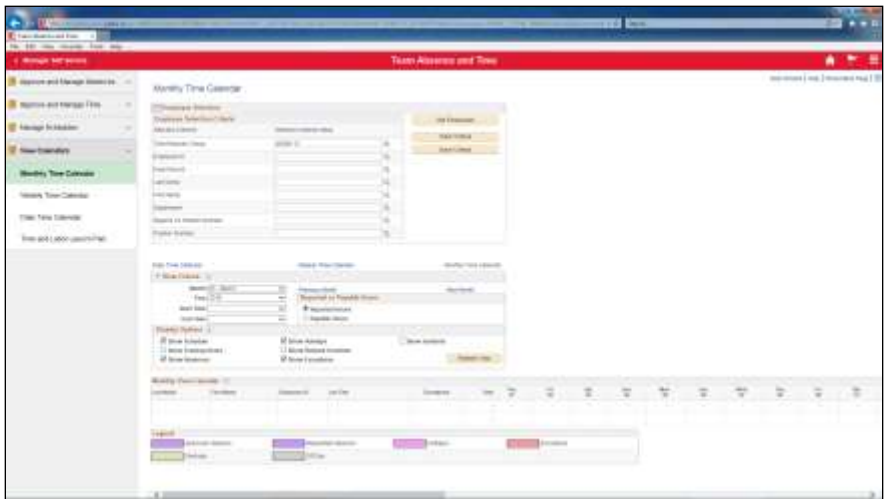
In this tutorial, you will learn how to:
- view the monthly, weekly, and daily calendars for employees
- modify what options are displayed in the calendar.

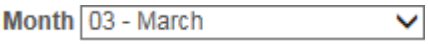
Procedure

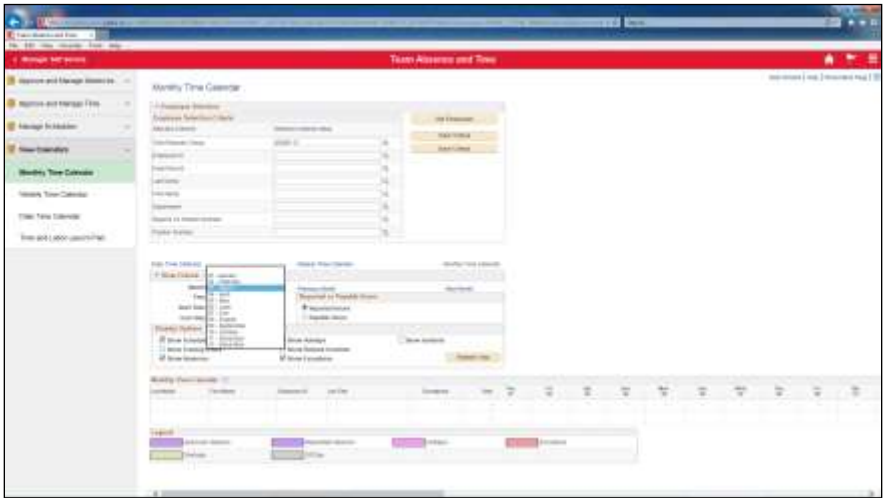
Step	Action
1.	Click the **Team Absence and Time** tile.



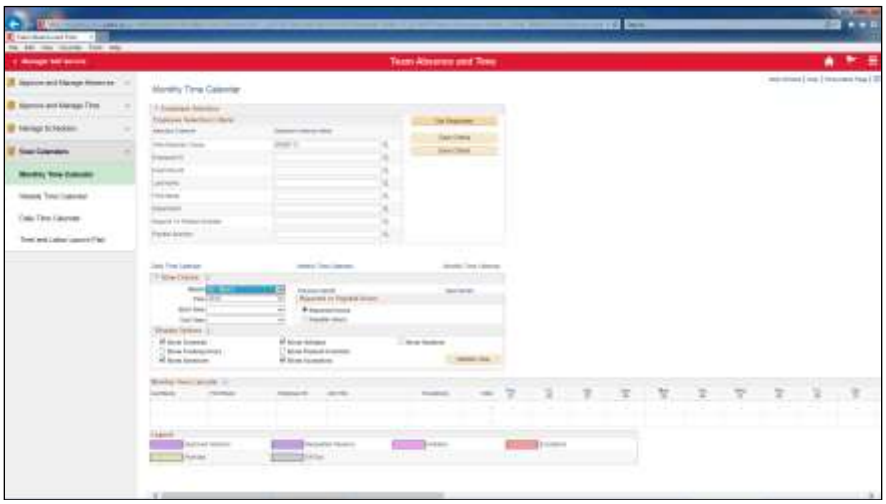
Step	Action
2.	Click the **View Calendars** link. 
3.	Click the **Monthly Time Calendar** object. 



Step	Action
4.	By default, the **Time Reporter Group** may be blank. However, some managers may use a Group code to select an employee group. In this scenario, the manager has selected a **Time Reporter Group** of **MS00113.** Click the **Month** list. 

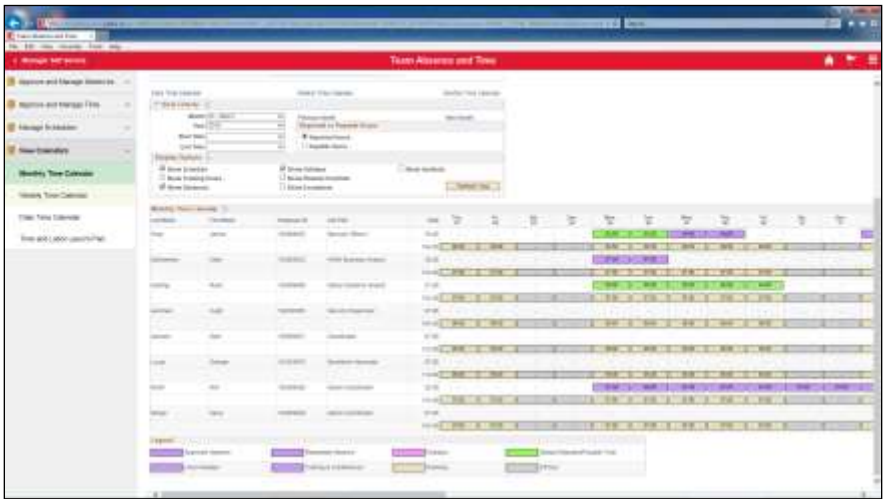


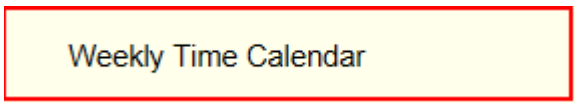
Step	Action
5.	Click the **03 - March** list item. 03 - March



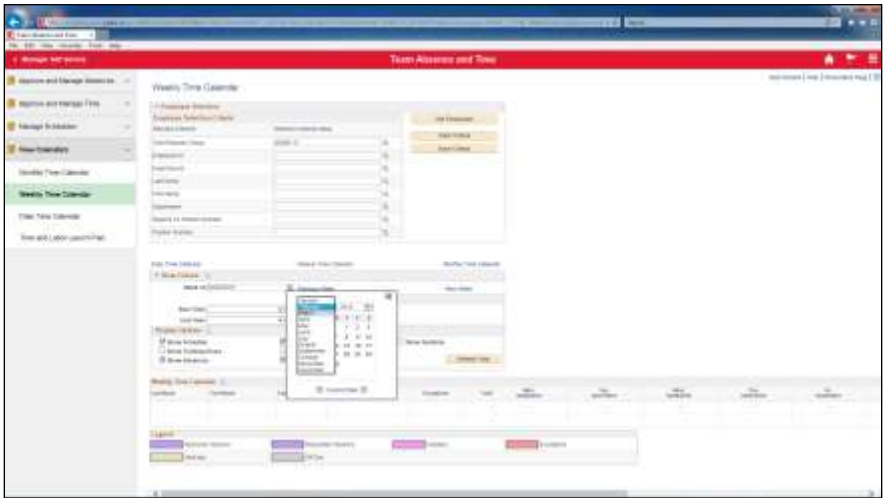
Step	Action
6.	Click the **Get Employees** button. Get Employees
7.	Click on the **left scroll bar** to move to the bottom of the page.

Step	Action
8.	You wish to view the schedule without the exceptions. (An exception is a possible error in a time sheet). To remove exceptions uncheck the **Show Exceptions** option.
9.	Click the **Refresh View** button.

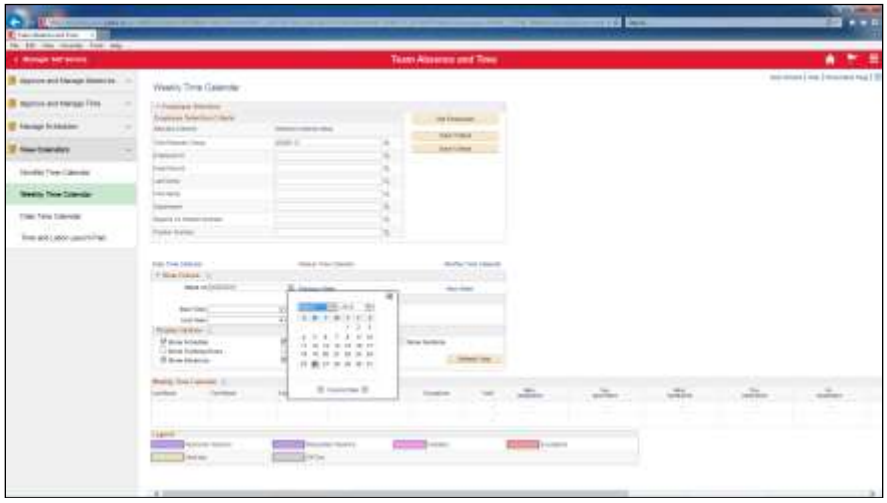


Step	Action
10.	Click the **Weekly Time Calendar** link. 

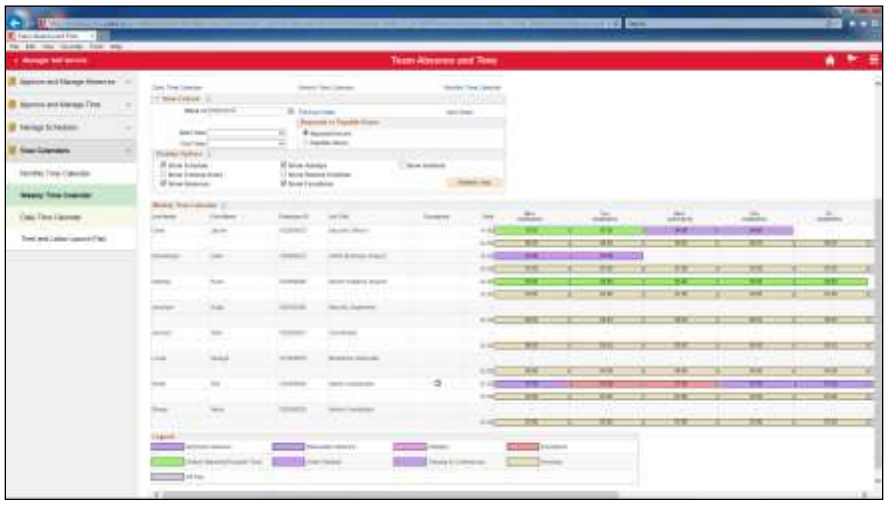
Step	Action
11.	Click the **Calendar** button.
12.	Click the **Month** list.

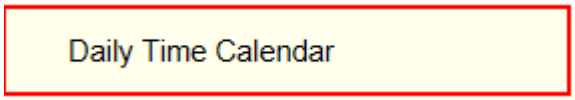


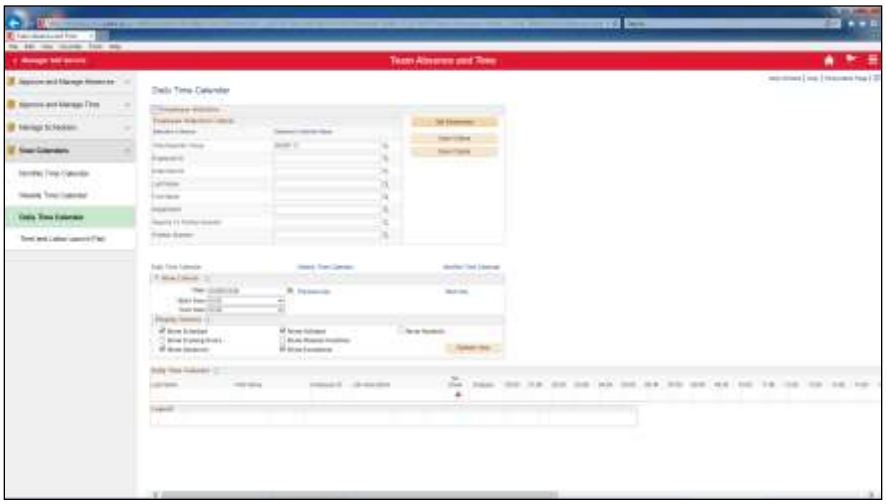
Step	Action
13.	Click the **March** list item.

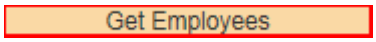


Step	Action
14.	Click on March **5th**. 5
15.	Click the **Get Employees** button. Get Employees
16.	Use the **Left Scroll Bar** to move the page down.
17.	The weekly calendar appears.



Step	Action
18.	Click the **Daily Time Calendar** link. 



Step	Action
19.	Click the **Get Employees** button. 
20.	The one-day calendar appears. You can scroll through the individual days using the Next Day link. Click the **Next Day** link.
21.	The one-day schedule for the next day appears.
22.	You have completed this tutorial. **End of Procedure.**

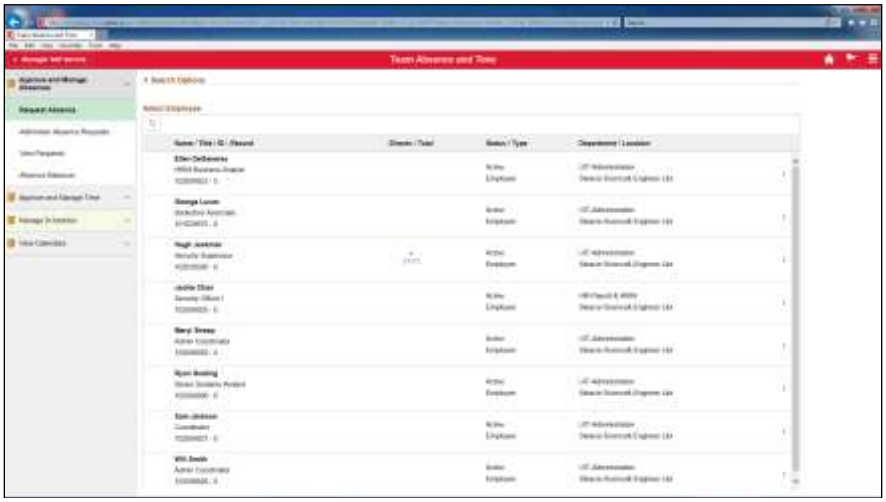
3.2 Assigning and Creating Schedules

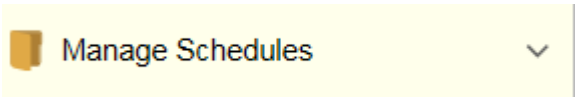
Learning Objectives:

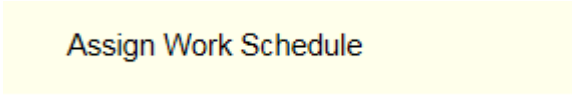
In this tutorial, you will learn how to create a personal schedule for an employee.

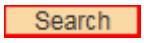
Procedure

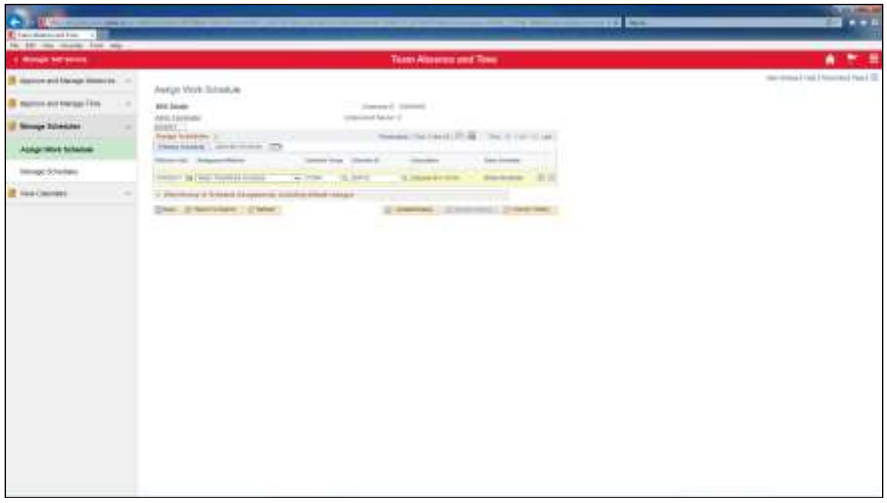
Step	Action
1.	Click the **Team Absence and Time** tile.



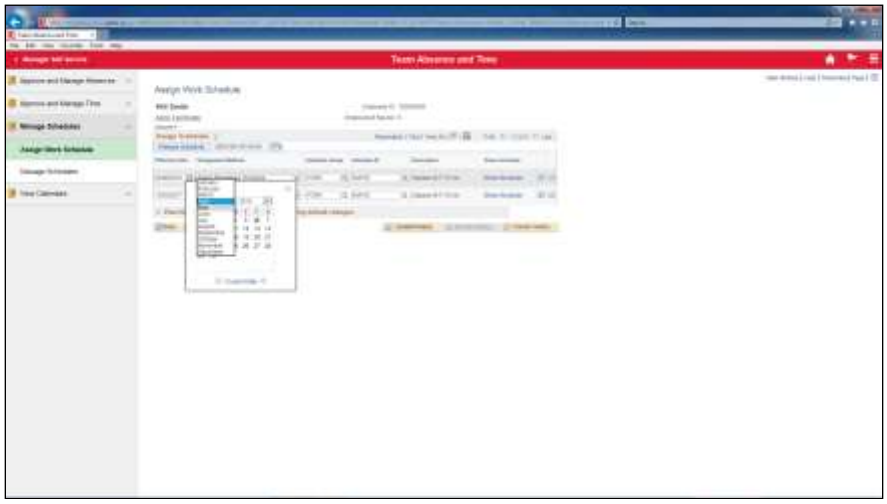
Step	Action
2.	Click the **Manage Schedules** link. 

Step	Action
3.	Click the **Assign Work Schedule** link. 

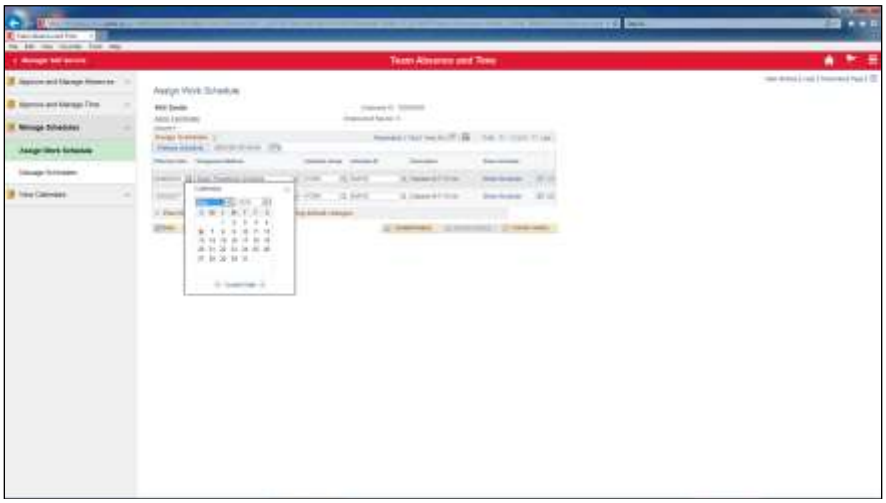
Step	Action
4.	Click in the **Name** field.
5.	You are looking for Will Smith. Enter "**will**" into the **Name** field.
6.	Click the **Will Smith** link.
7.	Click the **Search** button. 



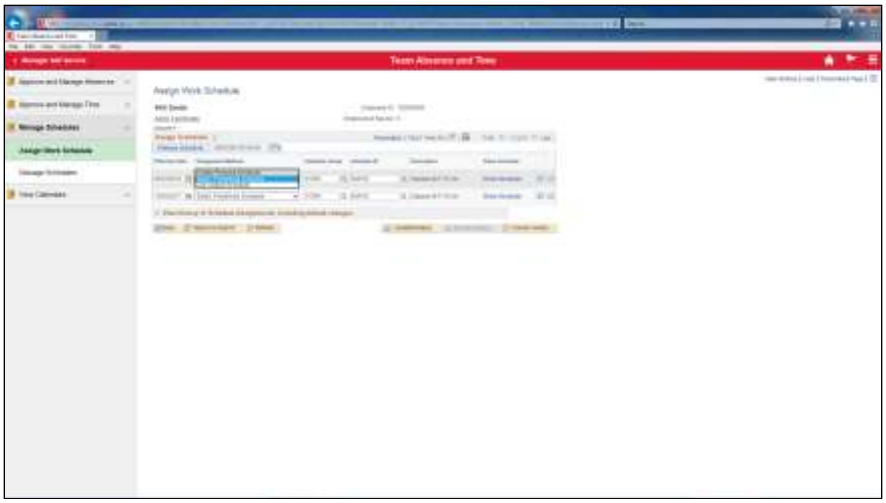
Step	Action
8.	Click the **Add a New Row** button.
9.	Click the **Calendar** button.
10.	Click the **Month** list.



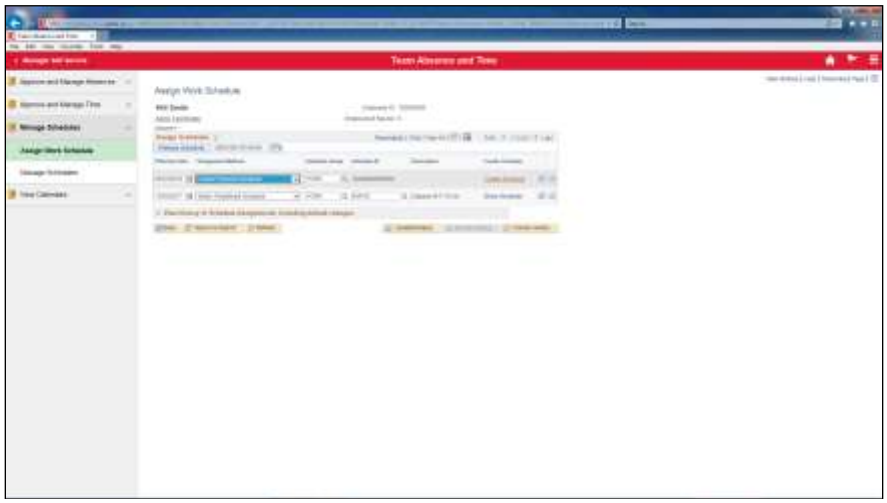
Step	Action
11.	Click the **May** list item. May



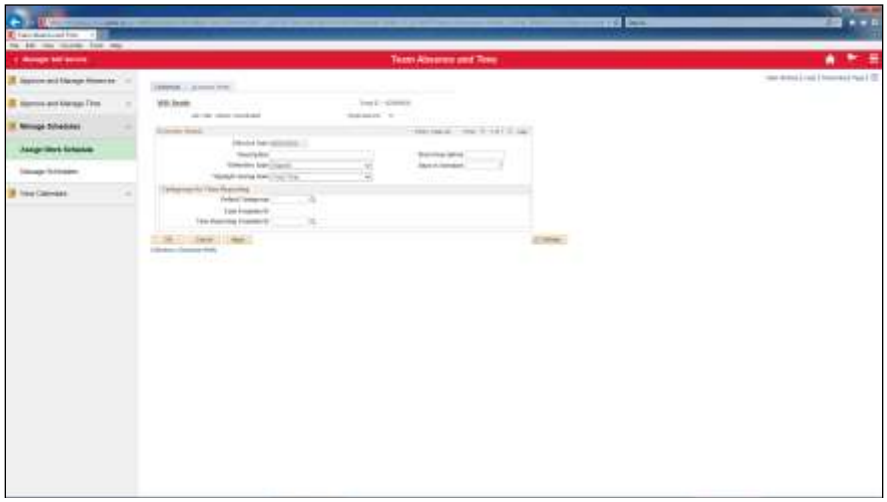
Step	Action
12.	Click May the **7** link 7
13.	Click the **Assignment Method** list. Select Predefined Schedule



Step	Action
14.	Click the **Create Personal Schedule** list item. Create Personal Schedule

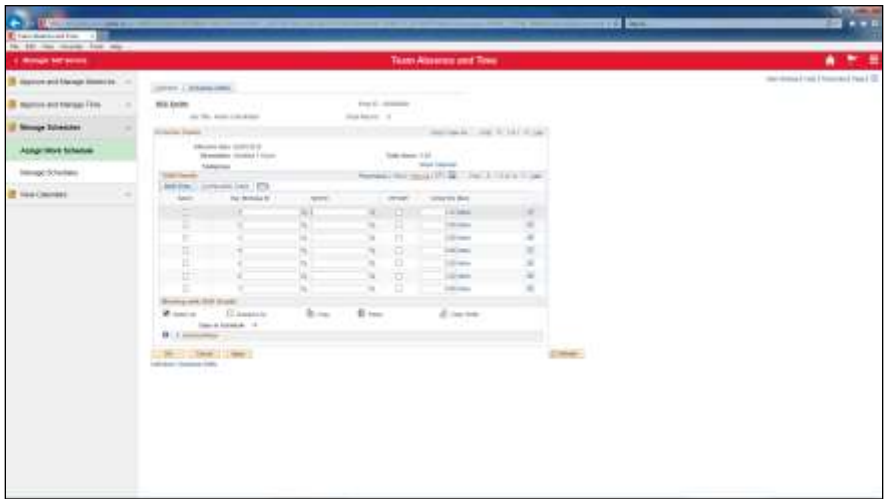


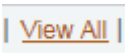
Step	Action
15.	Click the **Create Schedule** link. Create Schedule



Step	Action
16.	Enter the long description into the **Description** field. In this scenario, enter "**Modified 2 Hours**" or press <Enter>. Description
17.	Click in the **Short Description** field. Short Description
18.	Enter the brief description into the **Short Description** field. In this example, enter "**MOD24**". Short Description
19.	Click in the **Days in Schedule** field. Days in Schedule 7
20.	Clear the current value. Press **[Backspace]**.
21.	Enter the number of days in the rotating schedule. In this scenario, there are 14 days (two weeks) in a rotating schedule. The weeks start on Monday and end on Sunday. Enter "**14**". into the **Days in Schedule** field. Days in Schedule
22.	Click the **OK** button. OK

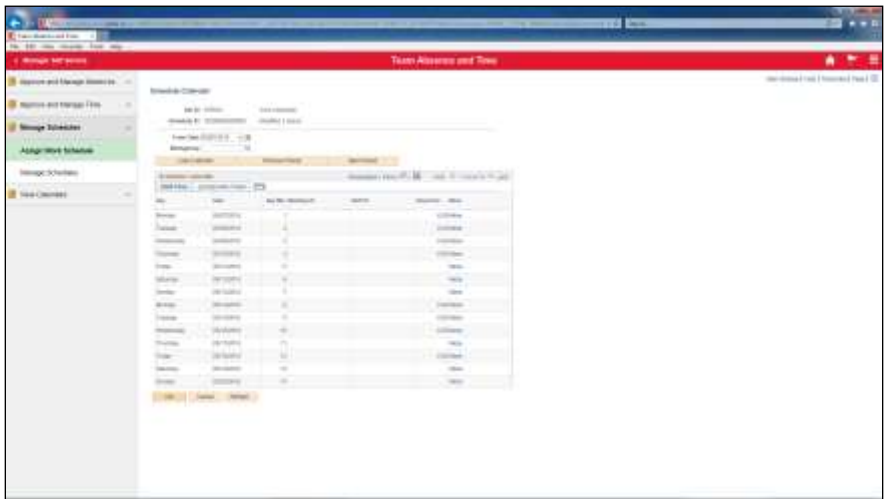
Step	Action
23.	A reminder appears that you must select either a standard, predefined schedule or enter the details of a schedule. In this example, you want to specify a unique schedule. Click the **OK** button.



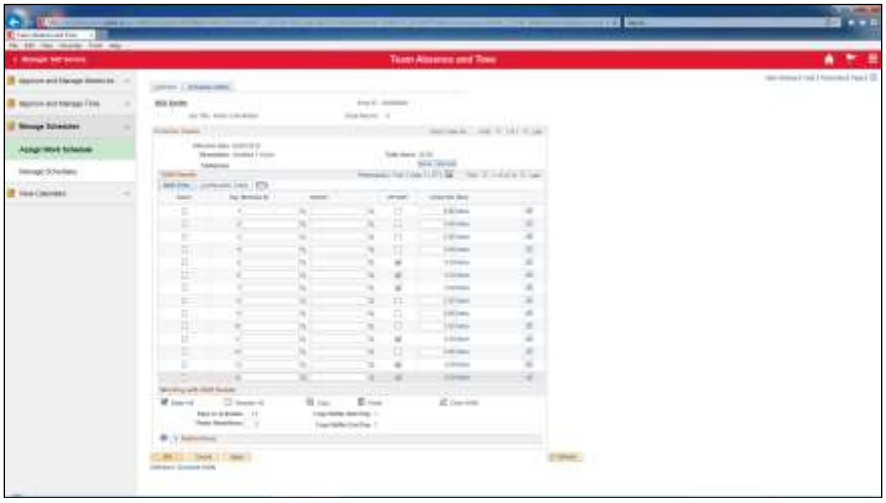
Step	Action
24.	There are 14 days in the personal schedule for the employee; 7 are displayed. To view the entire schedule, click the **View All** link. 
25.	Enter the number of work hours for the day. For day 1 (Monday), enter "**6**" into the **Sched Hrs** field.
26.	Enter the desired information into the **Sched Hrs** field. Enter "**6**".
27.	Enter the desired information into the **Sched Hrs** field. Enter "**6**".
28.	Enter the desired information into the **Sched Hrs** field. Enter "**6**".
29.	Click the **Select** option.

Step	Action
30.	Click the **Select** option.
31.	Click the **Select** option.
32.	Click the **Select** option.
33.	Click the **Select** option.
34.	Click the **Select** option.
35.	Click the **Select** option. The first 7 days of the schedule are selected. Now, you can copy and paste these days into the next 7 days.
36.	Click the **Copy** button. Copy
37.	Click the **Select** option.
38.	Click the **Paste** link. Paste
39.	Enter the desired information into the **Sched Hrs** field. Enter "**6**".
40.	Enter the desired information into the **Sched Hrs** field. Enter "**0**".
41.	Click the **Off Shift** option.
42.	Click the **Off Shift** option.
43.	Click the **Off Shift** option.
44.	Click the **Off Shift** option.

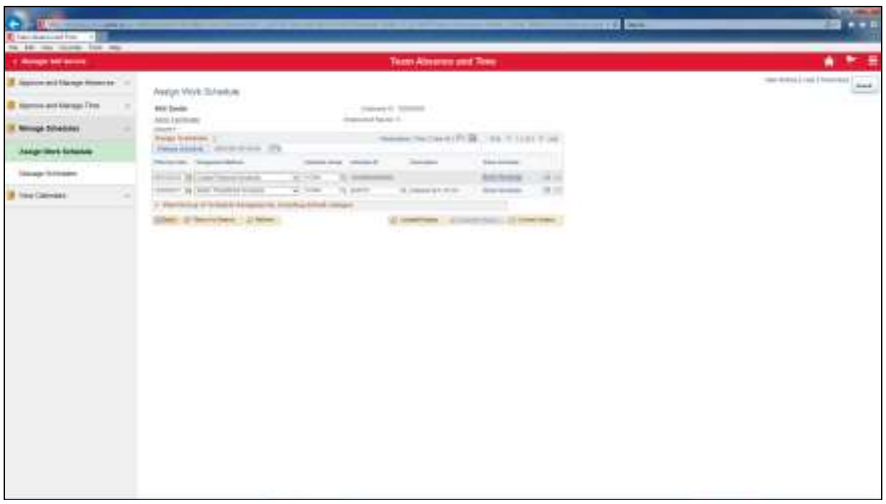
Step	Action
45.	Click the **Off Shift** option.
46.	Click the **Off Shift** option.
47.	Click the **Show Calendar** link. Show Calendar



Step	Action
48.	Click the **OK** button. OK



Step	Action
49.	Click the **OK** button. OK



Step	Action
50.	Click the **Save** button. Save
51.	Click the **Expand** button.
52.	The new, personal schedule appears with an effective date of May 7, 2018.
53.	You have completed this tutorial. **End of Procedure.**

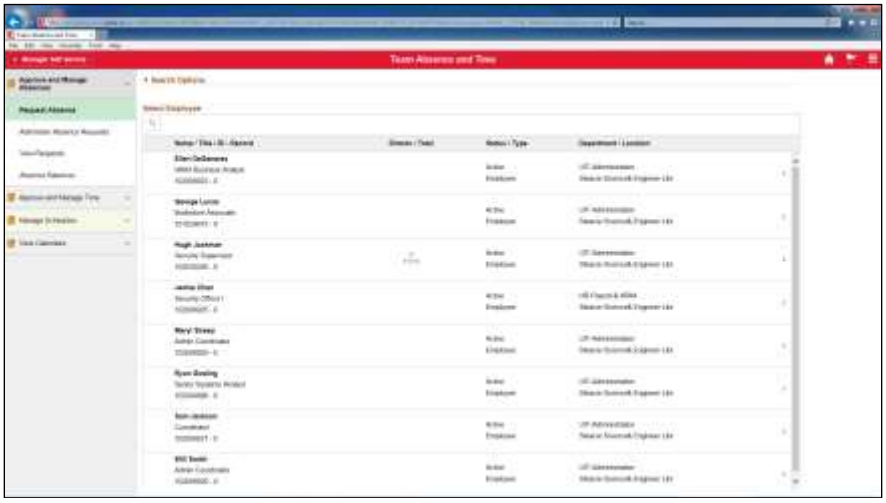
3.3 Making "One-Off" Changes to Schedules

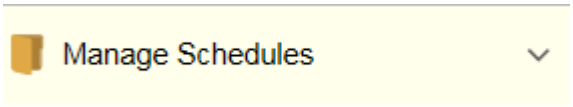
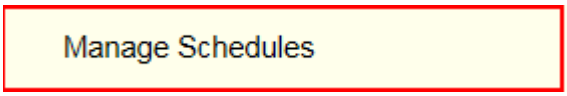
Learning Objectives:

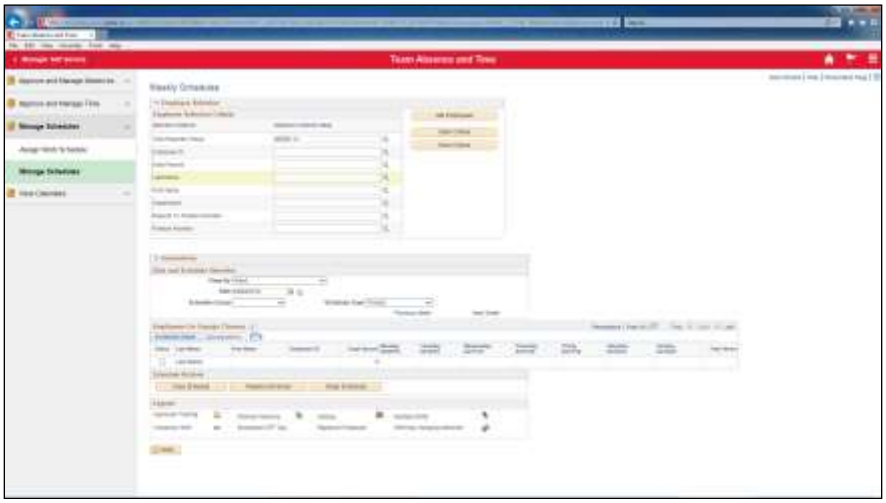
In this tutorial, you will learn how to make a change to a personal schedule for an employee. The change is a "one-off" and only applies to a particular schedule period.

Procedure

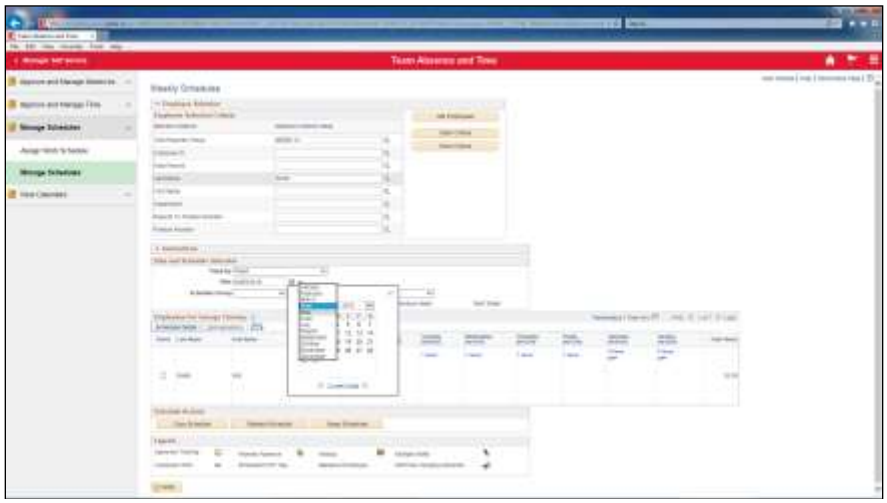
Step	Action
1.	Click the **Team Absence and Time** tile.



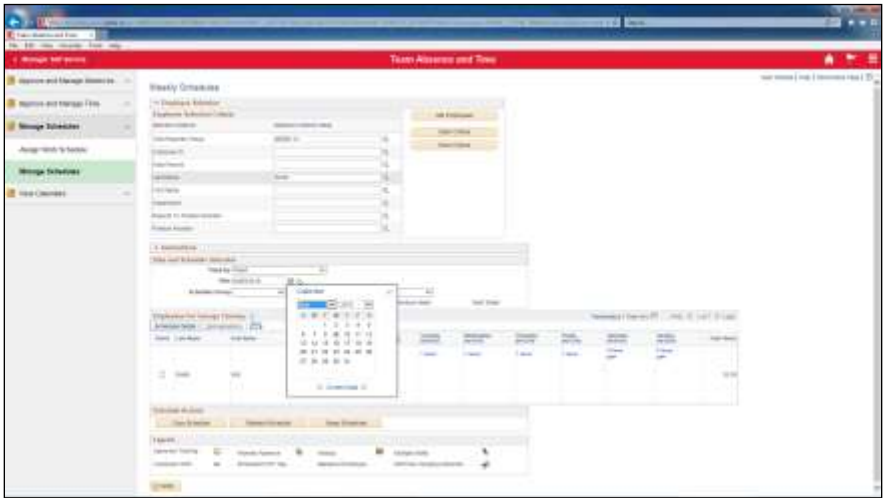
Step	Action
2.	Click the **Manage Schedules** link. 
3.	Click the **Manage Schedules** link. 



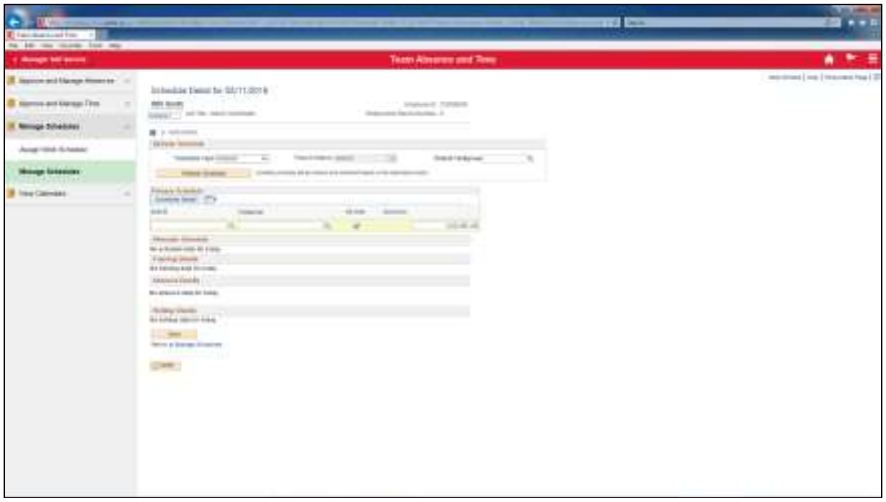
Step	Action
4.	By default, the **Time Reporter Group** may be blank. However, some managers may use a Group code to select an employee group. In this scenario, the manager has selected a **Time Reporter Group** of **MS00113.** Click in the **Last Name** field.
5.	You wish to retrieve Will Smith's schedule. Enter "**Smith**" into the **Last Name** field.
6.	Now, you specify the week for the schedule that you want to retrieve. Click the **Calendar** button.
7.	Click the **Month** list.

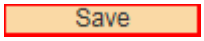


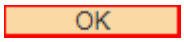
Step	Action
8.	Click the **May** list item.

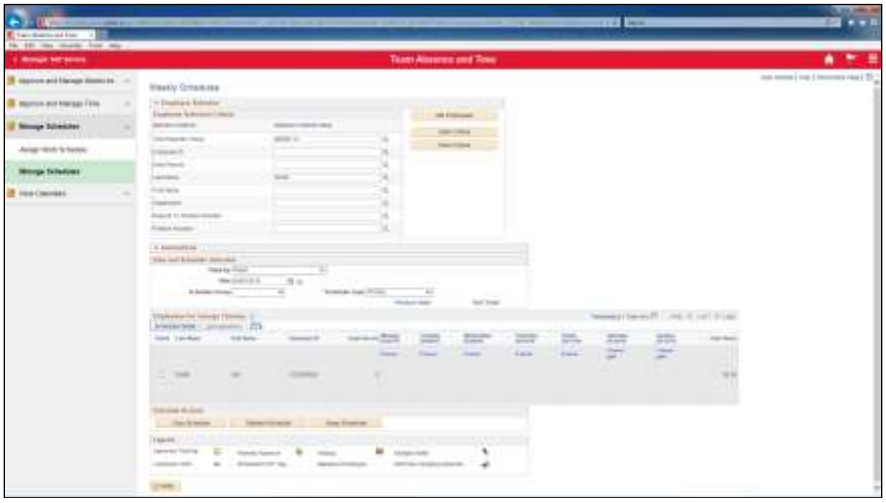


Step	Action
9.	Click the **7** link. 7
10.	Click the **Refresh** button.
11.	You wish to change the hours for May 11. Click the **0 Hours** link.

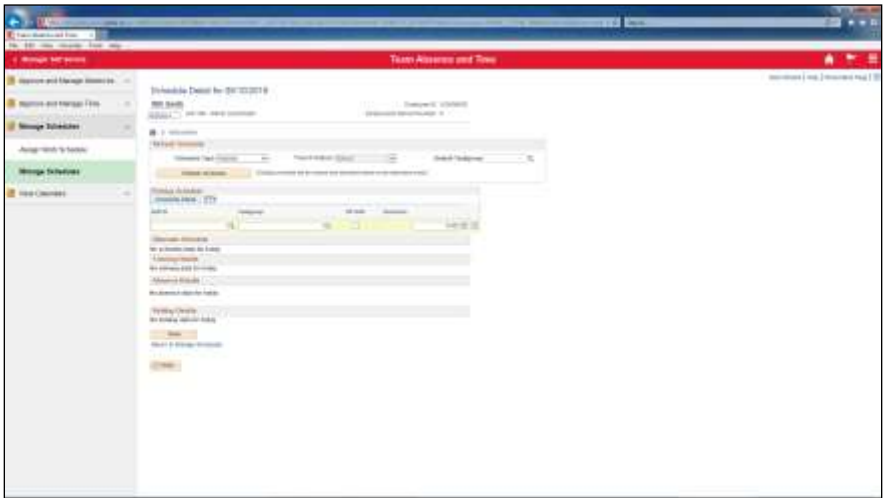


Step	Action
12.	Since Will Smith is working 6 hours on May 11, the **Off Shift** option should be de-selected. Click the **Off Shift** option.
13.	Will Smith will be working on May 11 for 6 hours. Enter "**6.0**" into the **Sched Hrs** field.
14.	Click the **Save** button. 

Step	Action
15.	Click the **OK** button. 



Step	Action
16.	Now you wish to assign 0 hours to May 10. Click the **6 Hours** link. 6 Hours



Step	Action
17.	Because May 10 will be zero hours, you will need to designate it as off-shift. Click the **Off Shift** option. ☐
18.	Enter "**0.0**" into the **Sched Hrs** field.

Step	Action
19.	Click the **Save** button. Save

Step	Action
20.	Click the **OK** button. OK
21.	The schedule for the week of May 7th has changed. Thursday, May 10 is now 0 hours, and off-schedule. Friday, May 11 is now 6 hours and on schedule.
22.	You have completed this tutorial. ***Congratulations!*** You have also completed the Time Reporting Tool for Managers course. **End of Procedure.**

Additional Employee Self Service Topics

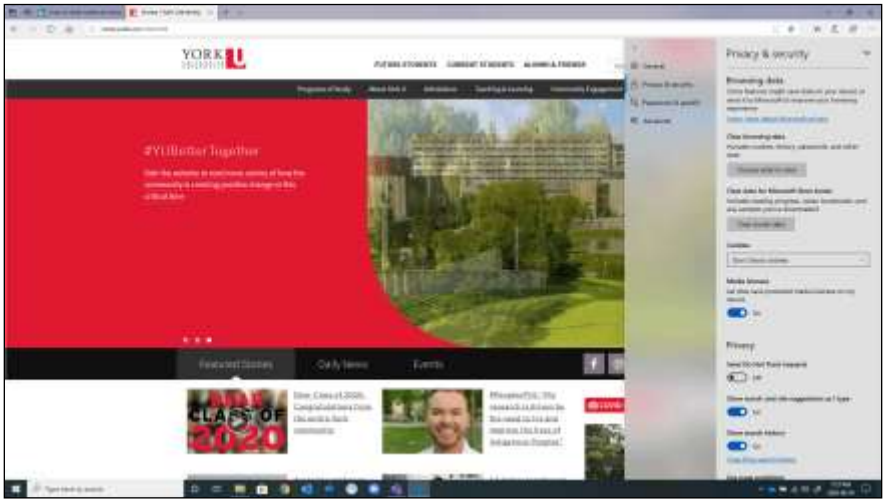
1. Clearing Browser Cache

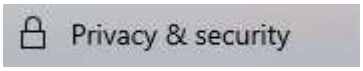
1.1 Clearing Browser Cache - Microsoft Edge

Learning Objectives:
At the end of this tutorial, you should know how clear the browser cache in Microsoft Edge.

Procedure

Step	Action
1.	Click the **Tools** (3 dots) button. ...
2.	Click the **Settings** menu. Settings

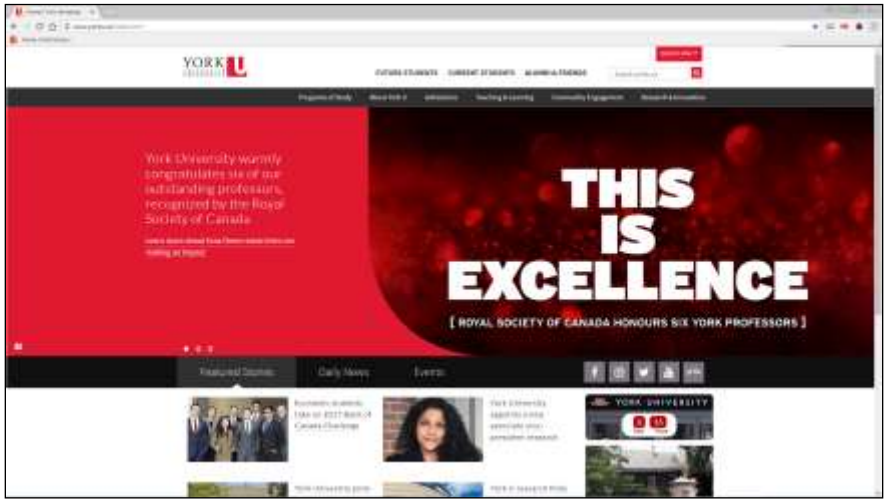


Step	Action
3.	Click the **Privacy & Security** menu. 
4.	Click the **Choose what to clear** button.
5.	Ensure that **only** *Cached data and files* is checked, and click the **Clear** button. **Note:** Uncheck all other options such as "Browsing history", "Cookies and saved website data", e.t.c. before proceeding.
6.	**End of Procedure.**

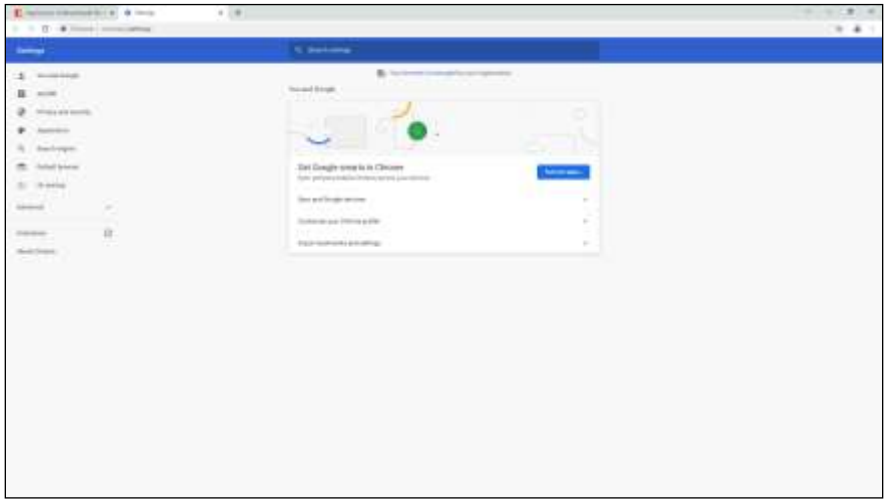
1.2 Clearing Browser Cache - Chrome

Learning Objectives:
At the end of this tutorial, you should know how clear the browser cache in Chrome.

Procedure

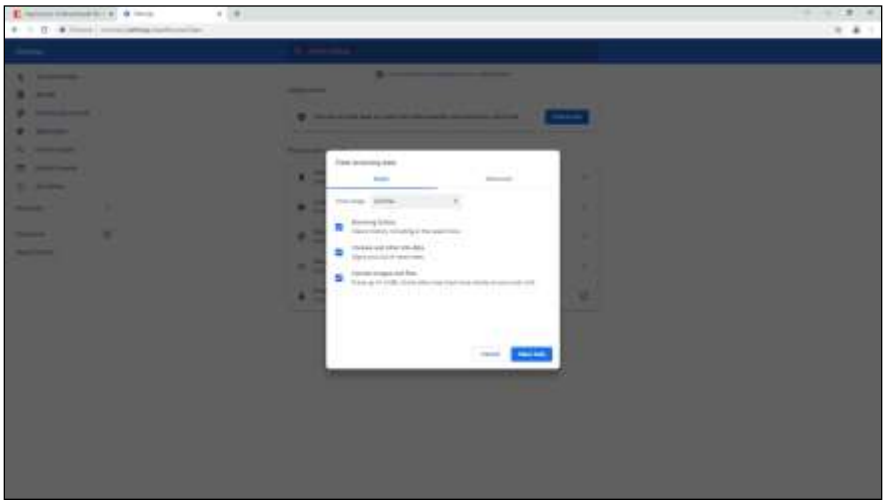


Step	Action
1.	Click the **Browser** menu.
2.	A submenu should appear. Click the **Settings** menu. Settings

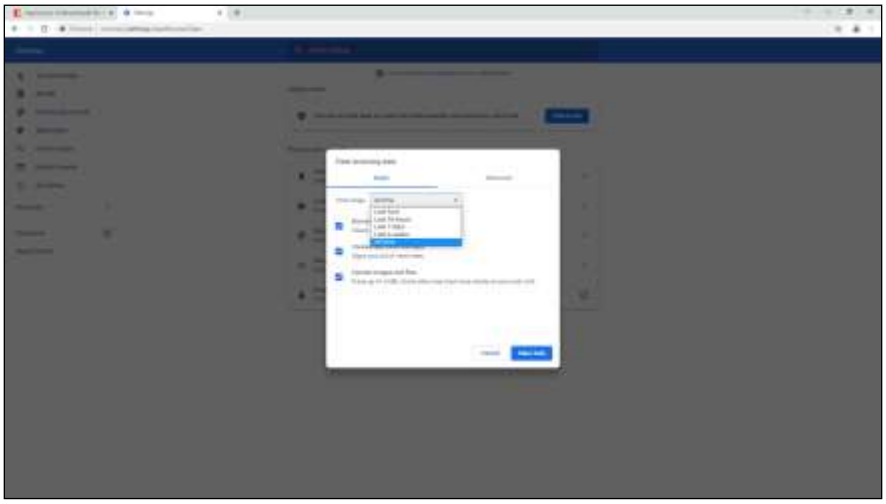


Step	Action
3.	Click the **Privacy and security** link. Privacy and security

Step	Action
4.	Click the **Clear browsing data** link.

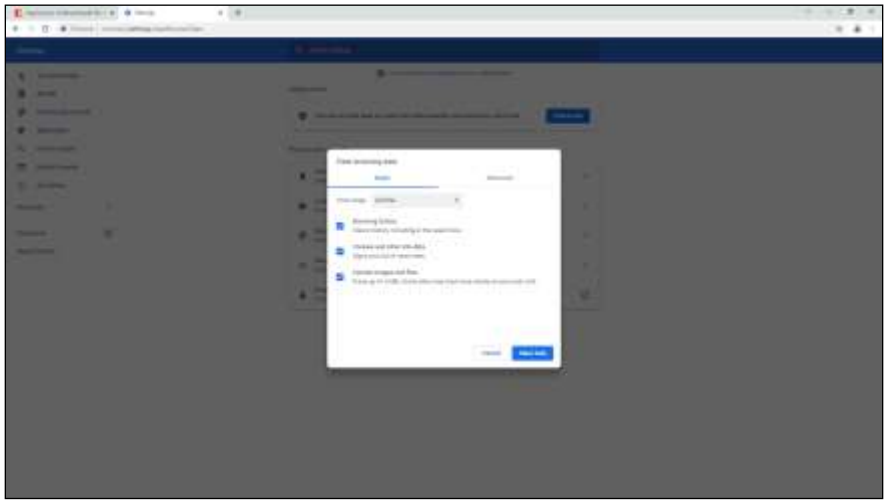


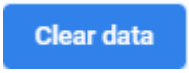
Step	Action
5.	Click the **Time range** menu.

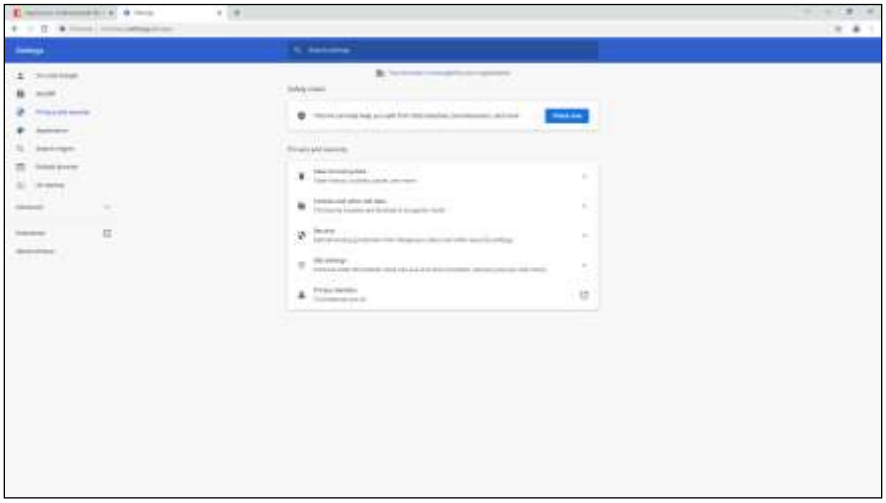


Step	Action
6.	Click the **All Time** list item.

Step	Action
7.	Ensure that **only** *Cached images and files* is checked. If "**browsing history**" & "**cookies and other site data**" are checked, they will need to be unchecked before clearing data.



Step	Action
8.	Click the **Browsing history** option to uncheck it.
9.	Click the **cookies and other site data** option to uncheck it.
10.	Click the **Clear data** button. 

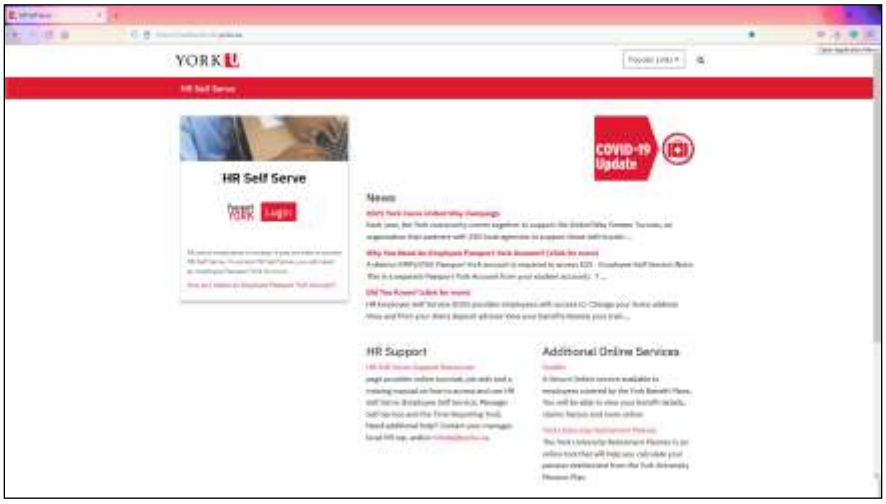


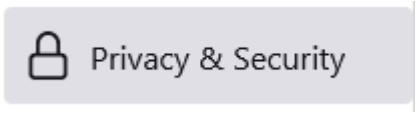
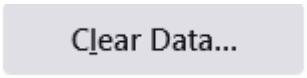
Step	Action
11.	Click the **Close** button.
12.	**End of Procedure.**

1.3 Clearing Browser Cache - Firefox

Learning Objectives:
At the end of this tutorial, you should know how clear the browser cache in Firefox.

Procedure

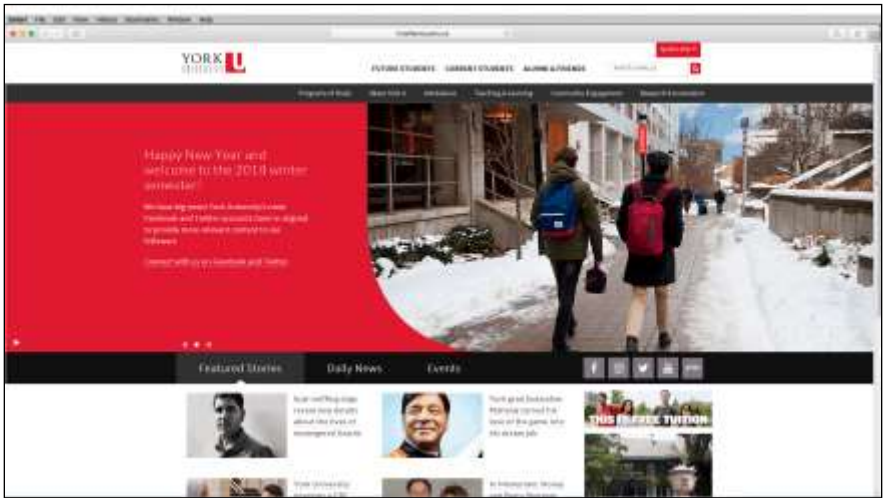


Step	Action
1.	Click the **Library or Application Menu** button. OR
2.	Click the **Settings** button.
3.	Click in the **Privacy & Security** field. 
4.	Scroll down to the **Cookies and Site Data** section.
5.	Click in the **Clear Data…** field. 
6.	Click the **Cookies and Site Data** option to uncheck it.
7.	Click the **Clear** button.
8.	Click the **Close (x)** button.
9.	**End of Procedure.**

1.4 Clearing Browser Cache - Safari

Learning Objectives:
At the end of this tutorial, you should know how clear the browser cache in Safari.

Procedure



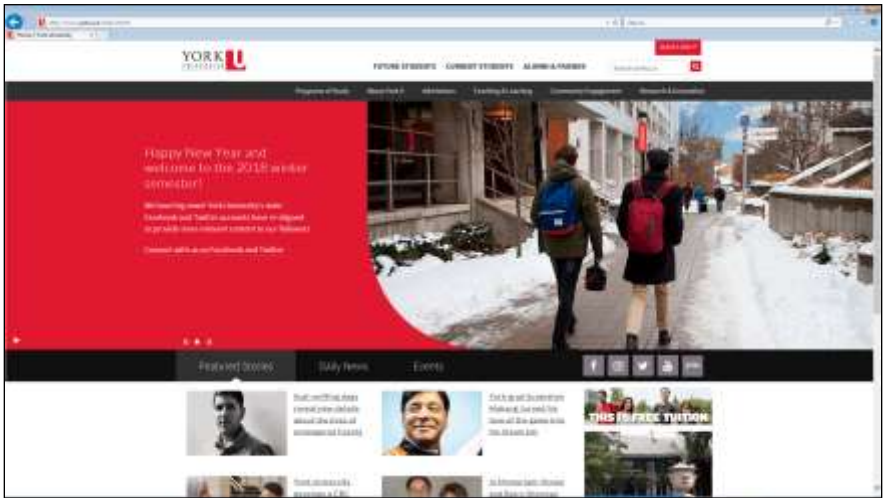
Step	Action
1.	Click the **Safari** button.
2.	Click the **Clear History** link.
3.	Click the **Clear history** option.
4.	**End of Procedure.**

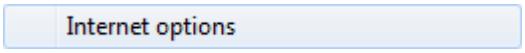
2. Allowing HR Self Serve through a Pop-up Blocker

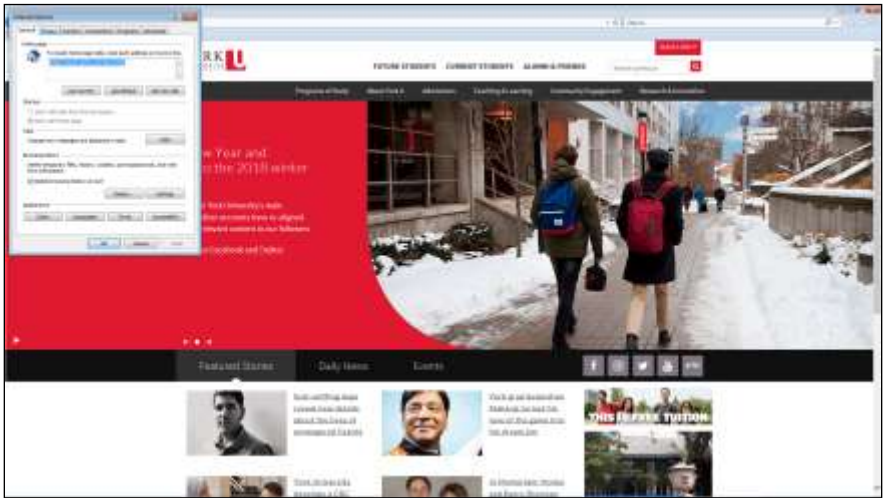
2.1 Allowing HR Self Serve through a Pop-Up Blocker - Internet Explorer

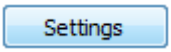
Learning Objectives:
At the end of this tutorial, you should know how allow HR Self Serve through a Pop-up Blocker in Internet Explorer.

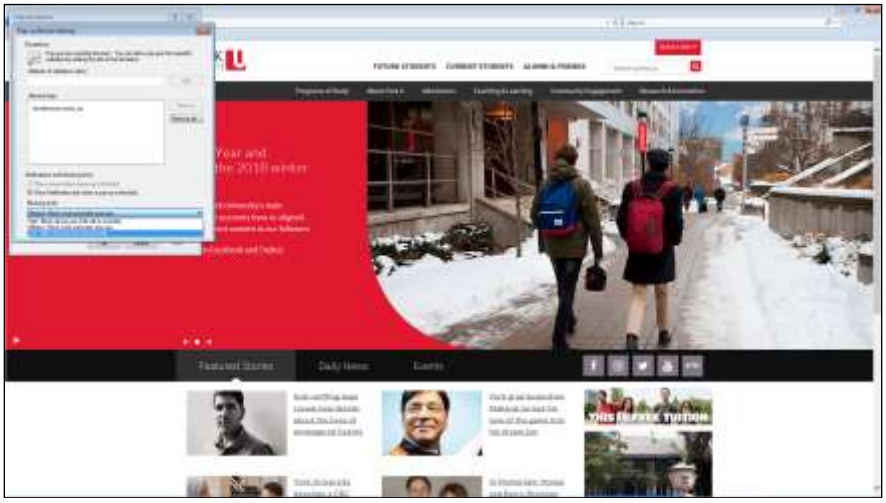
Procedure



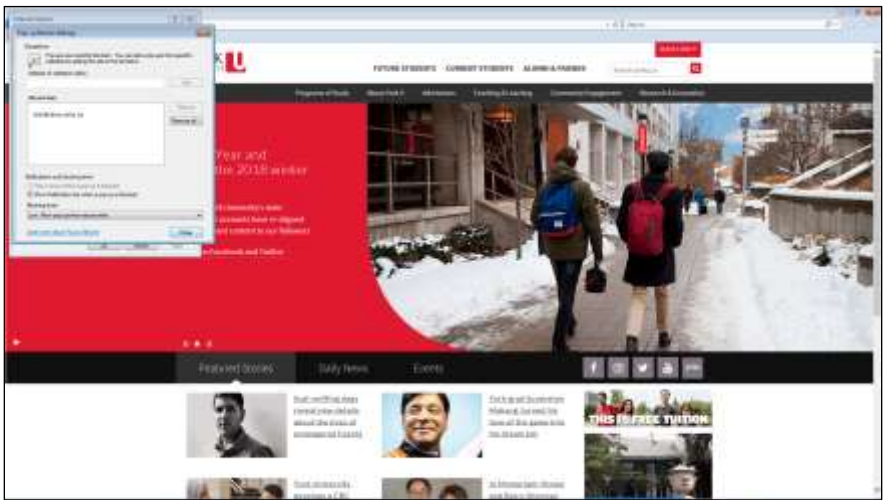
Step	Action
1.	Click the **Tools** button.
2.	Click the **Internet options** menu. 



Step	Action
3.	Click the **Privacy** tab.
4.	Click the **Settings** button. 
5.	Enter the URL for HR Self Serve into the address field. Enter "**hrselfserve.yorku.ca**".
6.	Click the **Add** button.
7.	Click the **Blocking level** list.



Step	Action
8.	Click the **Low: Allow pop-ups from secure sites** list item. Low: Allow pop-ups from secure sites



Step	Action
9.	Click the **Close** button. Close
10.	Click the **OK** button. OK
11.	**End of Procedure.**

2.2 Allowing HR Self Serve through a Pop-Up Blocker - Chrome

Learning Objectives:
At the end of this tutorial, you should know how allow HR Self Serve through a Pop-up Blocker in Chrome.

Procedure

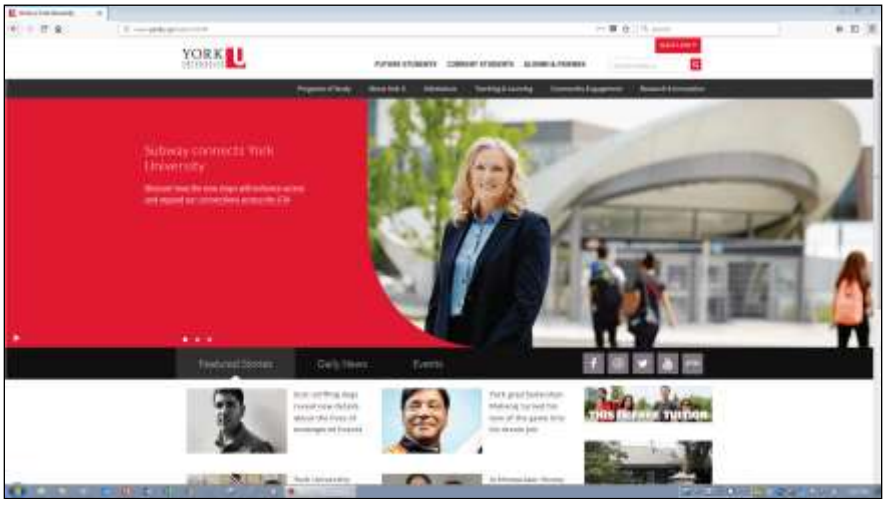
Step	Action
1.	Click the **Options** button.
2.	Click the **Settings** list item.
3.	Click the **Settings** button.
4.	Click the **Expand List** arrow.
5.	Click the **Privacy and Security** list item.
6.	Locate Content Settings. Click the **More** arrow.

Step	Action
7.	Locate Popups on the list. Click the **More** arrow.
8.	Click the **Add** button.
9.	Enter the URL of the HR Self Serve web site. This will permit HR Self Serve through the Pop-Up Blocker. Enter "**hrselfserve.yorku.ca**".
10.	Click the **Add** button.
11.	**End of Procedure.**

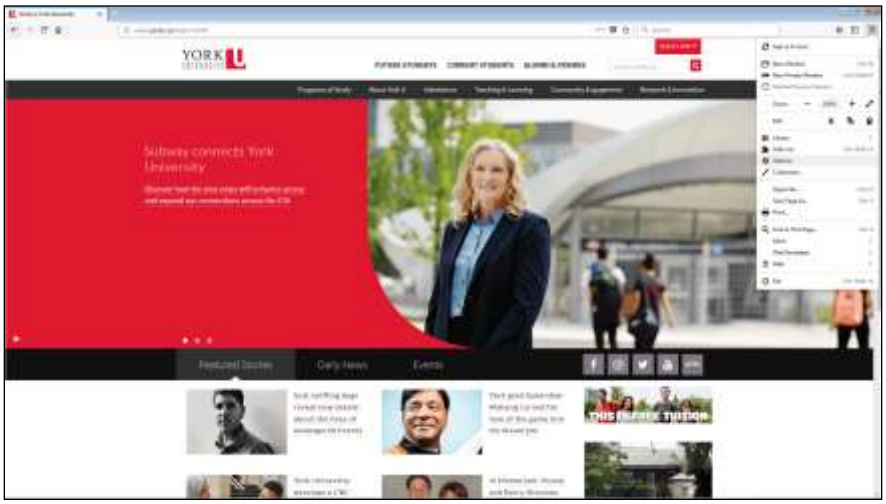
2.3 Allowing HR Self Serve through a Pop-Up Blocker - Firefox

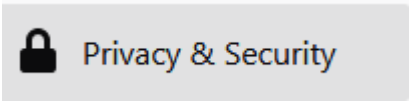
Learning Objectives:
At the end of this tutorial, you should know how allow HR Self Serve through a Pop-up Blocker in Firefox.

Procedure



Step	Action
1.	Click the **Menu** button.



Step	Action
2.	Click the **Options** list item.
3.	Click the **Privacy & Security** list item. 
4.	Depending on your screen size, you may need to scroll down the screen to see the **Permissions** area.
5.	The option **Block pop-up windows** appears at the bottom of the **Permissions** area. Click the **Exceptions** button.
6.	Enter the URL information into the **Address of website** field. For HR Self Serve, Enter "**hrselfserve.yorku.ca**".
7.	To add the URL press **[Enter]**.

Step	Action
8.	Click the **Save Changes** button. Save Changes
9.	**End of Procedure.**

2.4 Allowing all Pop-ups- Safari (Desktop or Laptop)

Learning Objectives:
At the end of this tutorial, you should know how allow HR Self Serve through a Pop-up Blocker in Safari.

Procedure

Step	Action
1.	Click the **Safari** button. Safari
2.	Within Safari, pop-up blocking is not selective. This means that all websites are blocked or all web sites are allowed pop-ups. While using HR Self Serve, some features require pop-ups to be enabled. Click the **Preferences** link.

Step	Action
3.	Enabling pop-ups is done using the Security Menu. If you wish to enable pop-up blocking after using HR Self Serve, remember to re-enable the feature. De-select the **Block Pop-Up Windows** checkbox.
4.	**End of Procedure.**

2.5 Allowing all Pop-ups- Safari (Mobile Device)

Learning Objectives:
At the end of this tutorial, you should know how to allow HR Self Serve through a Pop-up Blocker in Safari on a mobile device (iOS).

Procedure

Step	Action
1.	In this scenario, you want to download the **T2200S Form** which is available on the T2200S Forms tile within the Payroll and Compensation tile in Employee Self Service. Click the **T2200S Form** link.

Step	Action
2.	When selecting the link, if you do not see the prompt to allow pop-up window: Go to the **HomePage on your cell phone-> Select Settings-> Select Safari-> Block Pop-ups**.

Step	Action
3.	Click the **Settings** button.

Step	Action
4.	Click the **Safari** button.

Step	Action
5.	Within Safari, to allow pop-up blocking, click the **Block Pop-ups** button.
6.	Pop-ups is now turned off. Go back to your browser and retry your action.
7.	Click the **T2200S Form** link.
8.	On the pop-up screen, select "Allow" and this will download the pdf form on your mobile device. Click the **Allow** button.
9.	The PDF file opens in a new window. **Note:** If you wish to enable pop-up blocking after using HR Self Serve, remember to re-enable the feature.
10.	**End of Procedure.**

PeopleSoft Navigation for Core Users

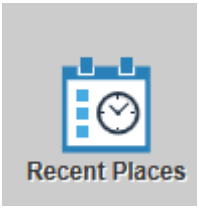
1. Using the Navigation Menu Bar (Navbar)

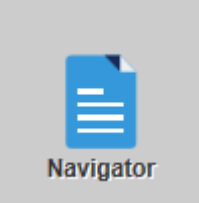
Learning Objectives:

In this tutorial, you will become familiar with accessing the functions available on the **Navigation Menu Bar.**

Procedure

Step	Action
1.	Depending on your role at York, you may be given access to core Peoplesoft menus and pages to perform administrative functions. If you have this access, you will see a **Navigation Menu Bar** button on your main page. The button image is a compass. Click the **Navigation Bar** button.

Step	Action
2.	A list of functions appears. This list is called the **Navigation Menu Bar** or **NavBar** for short**.** The set of functions available on the **Navigation Menu Bar** include: - Recent Places - My Favorites - Navigator - and, links to other tiles. Click the **Recent Places** button. 
3.	The list of **Recent** Peoplesoft pages appears. **Recent Places** will change as you work in the system. The five most recent places are presented.

Step	Action
4.	The next function is **My Favorites.** This function allows you to access a list of pages that you have saved. Click the **My Favorites** button.
5.	The list of **Favorites** appears. In this scenario, Dev Patel has saved links to several pages. Note that the **Edit Favorites** function appears at the top of the list. This allows you to change the order of the list or delete links.
6.	The next function is the **Navigator**. This function provides a layered menu of Peoplesoft pages. Click the **Navigator** button. 
7.	The **Navigator** provides a list of menus and pages. Note that a right arrow is the **More d**etails button and indicates that a submenu is available. On the **NavBar,** additional items, such as **My Team** and **Pay,** are quicklinks to tile pages.
8.	**End of Procedure.**

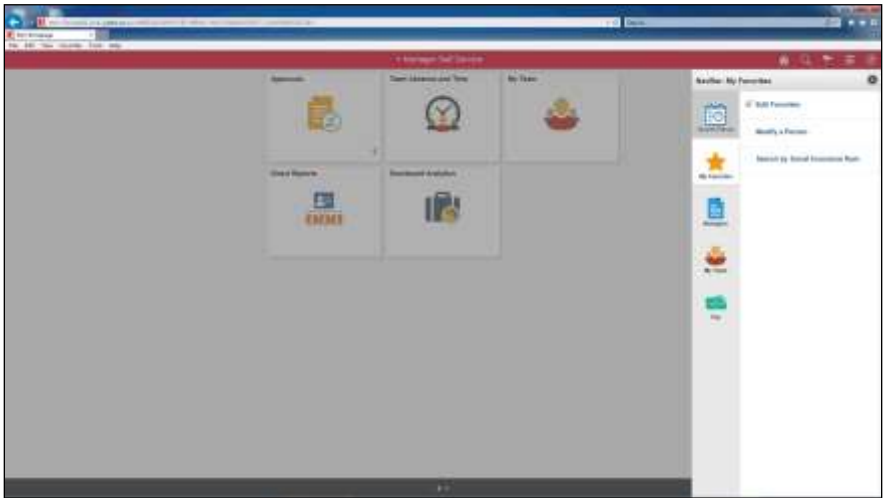
2. Reviewing Recent Places

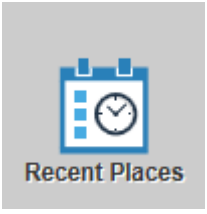
Learning Objectives:

In this tutorial, you will become familiar with the function to view **Recent** locations.

Procedure

Step	Action
1.	Click the **NavBar** button.



Step	Action
2.	Click the **Recent Places** button. 

Step	Action
3.	Recent places are links. For example, Dev has **Search by National ID** as a recent link. Click on this link. Search by National ID
4.	You are taken to the page related to the link. **End of Procedure.**

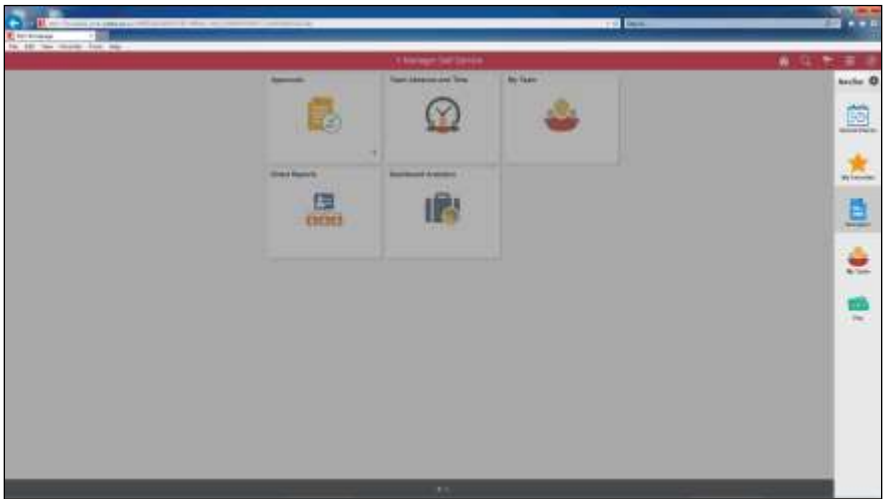
3. Adding Favourites

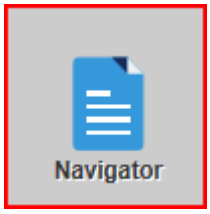
Learning Objectives:

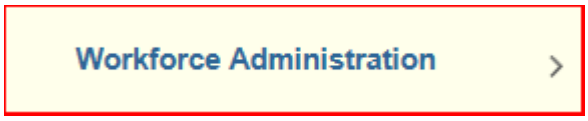
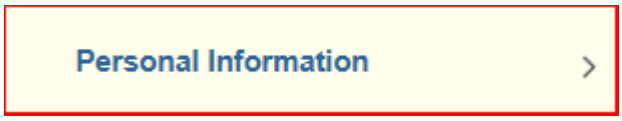
In this tutorial, you will locate two frequently used pages and **Add to Favorites.**

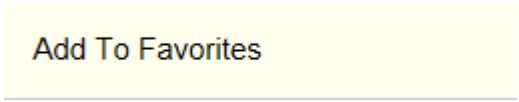
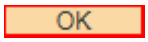
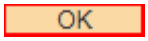
Procedure

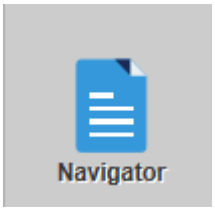
Step	Action
1.	You wish to add a page that you frequently use to your **Favorites** . The first page that you will add is **Add a Person.** The full navigation path to this page is: **Workforce Administration>Personal Information>Add a Person** Then, you will add the page to your **Favorites**. Click the **NavBar** button.



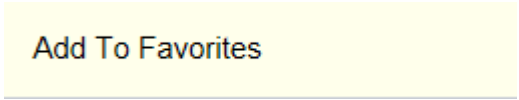
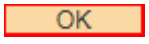
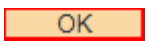
Step	Action
2.	Navigate to **Add a Person.** The full navigation path to this page is: **Workforce Administration>Personal Information>Add a Person** Click the **Navigator** button. 

Step	Action
3.	Navigate to **Add a Person.** **Workforce Administration**>Personal Information>Add a Person Click the **Workforce Administration** link. 
4.	Navigate to **Add a Person.** The full navigation path to this page is: Workforce Administration>**Personal Information**>Add a Person Click the **Personal Information** link. 
5.	Navigate to **Add a Person.** The full navigation path to this page is: Workforce Administration>Personal Information>**Add a Person** Click the **Add a Person** link.

Step	Action
6.	Now add the link to your **Favorites.** Click the **Actions List** button.
7.	Click the **Add To Favorites** menu. 
8.	Click the **OK** button. 
9.	The page Add a Person has been saved to your Favorites. Click the **OK** button. 
10.	You now want to add the **Current Benefits Summary** page to your **Favorites**. The full navigation path to this page is: **Benefits>Review Employee Benefits>Current Benefits Summary** Click the **NavBar** button.

Step	Action
11.	Click the **Navigator** button. 
12.	Note that the **Navigator** returns to the menu that you had recently used. The full navigation path to the page is: **Benefits>Review Employee Benefits>Current Benefits Summary** To locate **Benefits** click the **Back to Root** button.
13.	Navigate to **Current Benefits Summary.** The full navigation path to this page is: **Benefits**>Review Employee Benefits>Current Benefits Summary Click the **Benefits** link.
14.	Navigate to **Current Benefits Summary.** The full navigation path to this page is: Benefits>**Review Employee Benefits**>Current Benefits Summary Click the **Review Employee Benefits** link.

Step	Action
15.	Navigate to **Current Benefits Summary.** The full navigation path to this page is: Benefits>Review Employee Benefits>**Current Benefits Summary** Click the **Current Benefits Summary** link.

Step	Action
16.	Now add the link to your **Favorites.** Click the **Actions List** button.
17.	Click the **Add To Favorites** link. 
18.	Click the **OK** button. 
19.	Click the **OK** button. 

Step	Action
20.	**End of Procedure.**

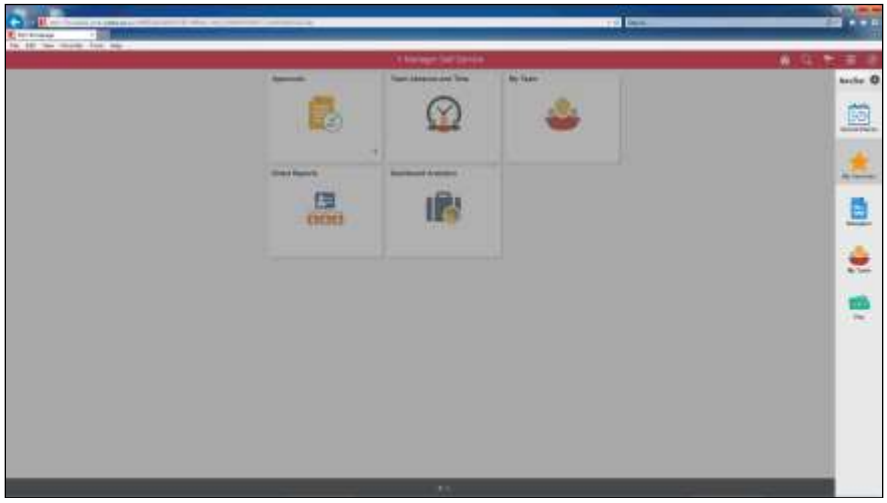
4. Managing Favourites

Learning Objectives:

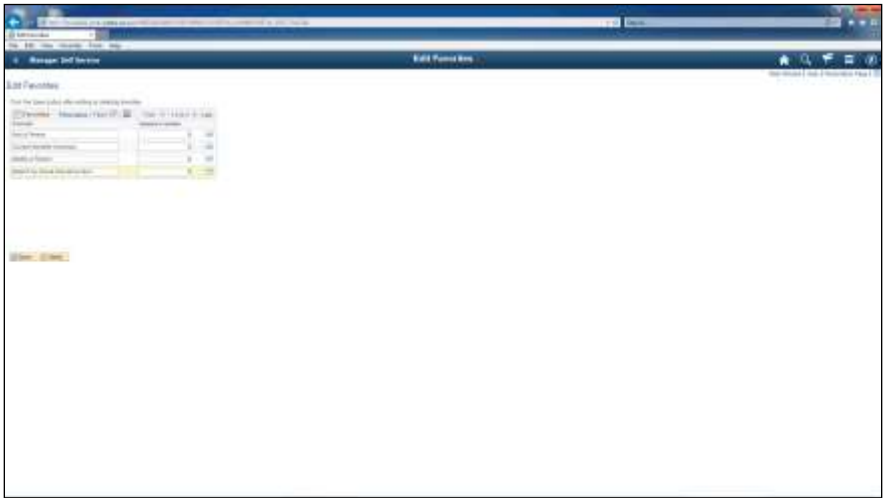
In this tutorial, you will become familiar with managing links to **Favorite** pages that you have saved. You will locate the list of **Favorite** links and change the order.

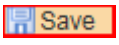
Procedure

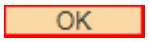
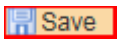
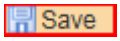
Step	Action
1.	First, locate the list of **Favorites** on the **Navigation Menu Bar.** Click the **NavBar** button.



Step	Action
2.	Click the **My Favorites** button.
3.	The list of saved **Favorites** appears. Now, edit the list. Click the **Edit Favorites** link.



Step	Action
4.	The list of **Favorite** links appears in alphabetic order. To change the order, or sequence, in which the list appears, change the number in the **Sequence Number** field. Click in the **Sequence number** field.
5.	Enter "**1**" into the **Sequence number** field.
6.	Click in the **Sequence number** field.
7.	Enter "**2**" into the **Sequence number** field.
8.	Click in the **Sequence number** field.
9.	Enter "**3**" the **Sequence number** field.
10.	Click the **Save** button. 
11.	The list of **Favorites** now appears in a numbered sequence.

Step	Action
12.	Page links can be deleted from the **Favorites** list. Delete the **Current Benefits Summary.** Click the **Delete row** button.
13.	Click the **OK** button. 
14.	Click the **Save** button. The **Current Benefits Summary** link has been deleted. 
15.	You can also rename a link. In this case, rename the **Search by Social Insurance Num** link. Click in the **Favorite** name field.
16.	Click the **Delete** option.
17.	Enter "**Search by SIN.**" into the **Favorite** name field or press Enter.
18.	Click the **Save** button. 
19.	**End of Procedure.**

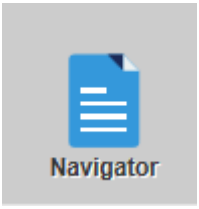
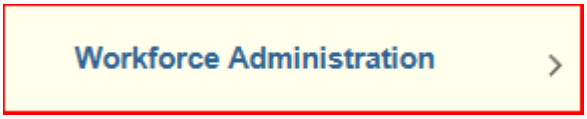
5. Using Navigator Menus

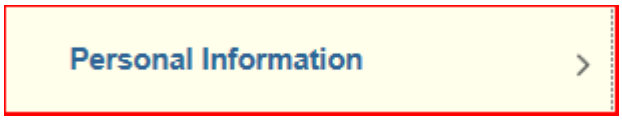
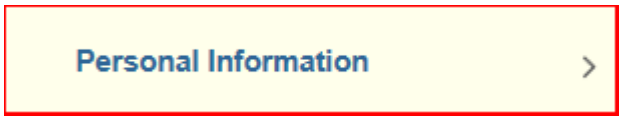
Learning Objectives:

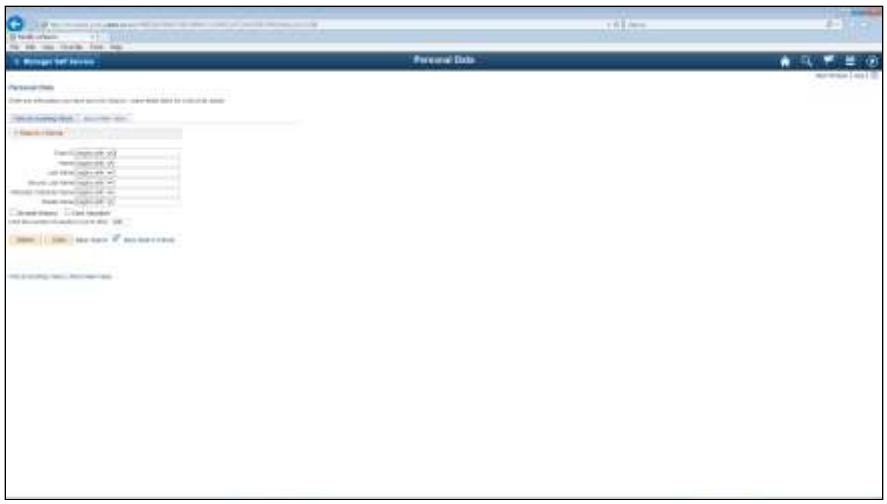
In this tutorial, you will become familiar with accessing menus and pages using the **Navigator**. The Navigator is located on the **Navigation Menu Bar (i.e. NavBar).**

Procedure

Step	Action
1.	Depending on your job at York, you may be given access to core Peoplesoft menus and pages to perform administrative functions. If you have this access, you will see a **Navigation Menu Bar** button on your main page. The button image is a compass. Click the **Navigation Bar** button.

Step	Action
2.	The Navigation Menu Bar (i.e. **NavBar)** provides a list of functions. This list includes the **Navigator** that provides access to menus and pages**.** Click the **Navigator** button. 
3.	The **Navigator** provides a list of menus and pages. The **Root** is the top of the main menu. Note that a right arrow is the **More** details button and indicates that a submenu is available.
4.	**Workforce Administration** is a menu available at the **Root**. Navigate to its submenu. Click the **Workforce Administration** link.
5.	The **Workforce Administration** submenu appears. When on a submenu, you can return to the **Root** menu by using the **Back to Root** button. Click the **Back to Root** button.
6.	The **Back to Root** button has returned you to the **Root** menu. To navigate to specific pages, you can select a sequence of menu links. We will navigate to the pages available on the **Personal Information** menu. This is a submenu within the **Workforce Administration** menu. Click the **Workforce Administration** link. 

Step	Action
7.	Navigate down one more menu level. Click the **Personal Information** link. 
8.	The list of menus and pages appears. In addition to the option to return to the **Root**, there is an option to go B**ack** to the prior menu level. To return to the prior menu level (e.g. **Workforce Administration)** click the **Back** button.
9.	Now, you want to find a page to search for an employee by first and last name. This page is located in the following path: **Personal Information > Biographical Information > Modify a Person** Navigate to **Modify a Person**. Click the **Personal Information** link. 
10.	Continue on the navigation path: Personal Information > **Biographical Information** > Modify a Person Click the **Biographical** menu.
11.	Continue on the navigation path: Personal Information > Biographical Information > **Modify a Person** Click the **Modify a Person** link.



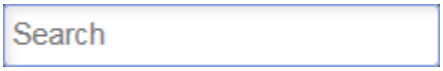
Step	Action
12.	A page appears that allows you to search for a person and, from there, modify the personal information. Here, you can search for an existing employee using their first and last name. When you are finished, remember to Sign Out from the system. Click the **Actions List** button.
13.	Click the **Sign Out** link. Sign out
14.	**End of Procedure.**

6. Using Navigation Search

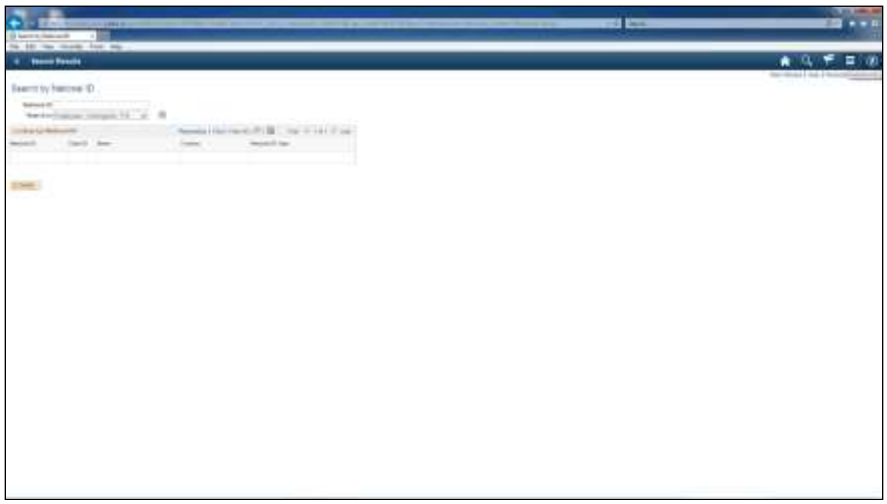
Learning Objectives:

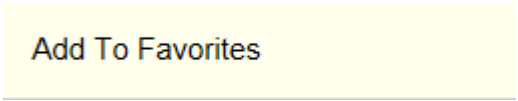
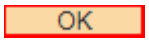
In this tutorial, you will become familiar with **Navigation Search**.

Procedure

Step	Action
1.	The **Search** function is available as a button in the top right-hand corner of any page. This function is only available to individuals that have access to Peoplesoft menus and pages for administrative functions. Click the **Navigation Search** button.
2.	Click in the **Search** field. 
3.	Within Peoplesoft, the Canadian Social Insurance Number is called a National ID. To search for all pages using this id, enter "**National ID**" in the search field.
4.	Click the **Search** button.

Step	Action
5.	A list of pages appears. The pages are related to the use of the Social Insurance Number. We want the page where you can search for an employee using the SIN. Click the last **Search by National ID** link. Search by **National ID**



Step	Action
6.	Having located the page, you wish to save the location to your **Favorites.** **Add to Favorites** is located on the **Action List.** Click the **Actions List** button.
7.	Click the **Add To Favorites** menu. 
8.	The original name of the page appears (i.e. Search by National ID). You can save the page under a different name. In this case, you wish to save the link under the name "Search by Social Insurance Number". First, clear the original name. Press **[Backspace]**.
9.	Enter a new name for the page. Enter "**Search by Social Insurance Number**" or press Enter.
10.	Click the **OK** button.
11.	Click the **OK** button. 
12.	**End of Procedure.**