LOGGING IN VIA PEOPLESOFT PORTAL

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

University of Houston System

	User ID (User ID is your 7-digit ID Number)
	Password
	Sign In
	Reset Password Request My User ID List of supported browsers
ĿР	University of Houston Clear Lake
-	th Texans • Statewide Search • Report Copyright Infringement • Privacy and Policies 2 University of Houston System • 4800 Calhoun, Houston Texas 77004

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

Select Human Resources

UNIVERSITY OF HOUSTON SYSTEM



ACCESSING TIME MANAGEMENT

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



Main Menu>Manager Self Service>Time Management

TIME APPROVER (TA) ROLE

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

RULES & WORKGROUPS

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

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

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

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

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

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

MAINTAIN TIME APPROVERS

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

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

Favorites Main Menu > Manager Self Service > Time Management		
Main Menu > Manager Self Service >		
Time Management		
Manage schedules, view and approve reported and pavable time, absence and over	time requests, exceptions, and more.	
Maintain Time Approvers Maintain Time Approvers	Assign permanent work schedules, change schedules for a day, week, or range of dales. Assign Work Schedule Manage Schedules	Approve Time and Exceptions Approve reported or payable time, overtime and absence requests, and manage exceptions. Exceptions Exceptions Absence Requests
Report Time Report time or request absences. Timesheet Absence Request	Time and Labor Reports Image: Interpretent term Image: Interpretent term Image: Interpretent term Interpretent term Interpretent term	View Time View calendars, balances, forecasted and payable time, accumulators and more. Payable Time Detail Absence Request History Absence Balances
Maintain Time Approvers		

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

Maintain Approvers

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



Adding Employees

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

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

Select Time Reports	
Empl ID Last Name	Return to Time Approvers
Business Unit Division ID College ID Department Q	
Search	Add Selected as Time Reports

Reassign Selected Time Reporters

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

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

Favorites	Ма	in Menu >	Manager	Self Service > Time	Managem	ient > Mair	ntain Time Appro	vers	
Se	Select Approver to receive Reassigned Reports								
		Empl ID							
	Las	st Name						Return to T	ïme Approvers
Sele	Last Name Return to Time Approvers Business Unit HR730 UH Main Division ID H0396 Output College ID Output Oppartment Output Search Clear Select this Approver for Reassignment Select an Approver Select an Approver								
Emp	ploye Id	e Report	Empl	Name	Bus Unit	Department		Position Number	
		Chipito	Rcd	hante	HR730	H0015	Educ Tech & Univ Outreach	01008271	Dir, Marketing (Coll/Div)
		_	0		HR730	H0053	Small Business Development Ctr	00100104	Mgr, Coll/Div Info Svcs 2
			0		HR730	H0113	Dean, Optometry	00107858	Dir, Exec, Pgm 2

Adding Proxies

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

Aaintain Time Approvers							
Nan	ne						
Empl ID		Empl	Rcd Nbr 0			Use Alternate Time	Approver
				Grou	Alt	ternate Approver In	fo
				H6060		nplid	Empl Rcd 0
Payro	II Approver]		Grou			
				H600F	F		
						Reassion Selected T	ime Reporters
						Reassign Selected T	ime Reporters
Add Ti	me Reporte	irs			[F	Reassign Selected T Delete Selected Tir	
Add Ti Time Re		ers)				Delete Selected Tir	
Time Re		Job Location	<u>C</u> ontact Info) <u> </u>		Delete Selected Tir	ne Reporters
Time Re	ports	_	<u>Contact Info</u>	Empl Rcd		Delete Selected Tir	ne Reporters
Time Re	eports porter Info <u>Non-</u> <u>Delete</u>	Job Location			Perso	Delete Selected Tir onalize <u>Find</u> View A	ne Reporters
Time Re	ports porter Info <u>Non-</u> <u>Delete</u> <u>Term</u>	Job <u>L</u> ocation			Perso	Delete Selected Tir onalize Find View Al Status	ne Reporters
Time Re Time Re	ports porter Info Non- Delete Term	Job <u>L</u> ocation Group ID H6060			Employee Type Salaried	Delete Selected Tir onalize Find View Al Status Active	ne Reporters

Delete Time Reporters

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

Empl ID 0002099 Empl Rcd	Nbr 0 Group H6060	ps	Jse Alternate Time	Approver
Payroll Approver Add Time Reporters	Group H600F		eassign Selected T Delete Selected Tir	ne Reporters
Time Reports Time Reporter Info Job Location C	ontact Info	<u>Perso</u>	nalize Find View Al	🔄 🛗 First 🚺 1-4 of 4 🗅 Last
Non-	nplid Empl Rcd	Employee Type	<u>Status</u>	Name
H6060	0	Salaried	Active	
H6060	0	Salaried	Active	
H6060	0	Salaried	Active	
H6060	0	Salaried	Active	

MANAGE SCHEDULES

Assign Schedules

Assign permanent work schedules, change schedules for a day, week, or range of dates.

ent work schedul

Assign Work Schedule

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

ASSIGN WORK SCHEDULES

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

Favorites Main Menu > Manager Self Service > Time Management		
Main Menu > Manager Self Service >		
Time Management		
Manage schedules, view and approve reported and payable time, absence and overtime required	y oxooptiona, and more.	
Maintain Time Approvers Maintain Time Approvers	Assign permanent work schedules, change schedules for a day, week, or range of dates. Assign Work Schedule Manage Schedules	pprove Time and Exceptions pprove reported or payable time, overtime and absence requests, and manage exceptions. I <u>Reported Time</u> <u>Exceptions</u> Absence Requests
Report Time Report time or request absences. Timesheet Absence Request	Time and Labor Reports Image: TL Hierarchy Report Image: TL Parable Time Report Image: TL Reported Time Report	View Time View calendars, balances, forecasted and payable time, accumulators and more. Parable Time Summary Parable Time Detail Absence Request History Absence Balances
Favorites Main Menu > Manager Self Service > Time Managem	ent	

Manage Schedules Change schedules, swap or copy employee schedules or schedule replacements

MANAGE SCHEDULES

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

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

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

Assign Work Schedule Enter any information you have and click Search. Leave fields blank for a list of all values.				
Find an Existing Value				
▼ Search Criteria				
Empl ID:	begins with 💌			
Empl Rcd Nbr:	=			
Name:	begins with 💌			
Last Name:	begins with 💌			
Business Unit:	begins with 💌			
Department:	begins with 👻			
Organizational Relationship:	=			
Case Sensitive				
Search Clear Bas	ic Search 📳 Save Search Criteria			

Once the employee is selected...

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

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

	Favorites Main Menu	> Manager Self Service >	Time Management	: > Manage Schedules	> Assign Work Schedule			
	Assign Work	(Schedule						
			Employe	e ID:				
	Job Title:		Employe	e Record Number: 0		•		
	Assign Schedules			Pers	sonalize Find View All 🕰 🖁	🖩 First 🖾 1-2 of 2	2 🕨 Last	
		<u>)</u>						
	*Effective Date *As:	signment Method	Schedule Group	Schedule ID	Description			
$\mathbf{\Lambda}$	03/05/2013 🛐 Us	e Default Schedule 💌	BASE	PMF8/5	P MF8:00A-5:00P 12:00N- 1:00P	Show Schedule	+ -	
	Us	e Default Schedule 📃					+ -	
	▷ View history of Schedule Assignments, including default changes							
	🗐 Save 🔍 Retur	n to Search + Previous in Lis	t Next in List	🗘 Refresh				

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

Favorites Main Menu > Manager Self Service >	Time Management	> Manage Schedules	> Assign Work Schedule		
Assign Work Oshadula					
Assign Work Schedule					
	Employe	e ID:			
Job Title:	Employe	e Record Number: 0			
Assign Schedules		Pers	sonalize Find View All 🗖	🖩 🛛 First 🚺 1-2 of 2	2 🕨 Last
Primary Details					
*Effective Date *Assignment Method	Scherule Group	Schedule ID	Description		
03/05/2013 🙀 Use Default Schedule 💌	B/ JE	PMF8/5	P MF8:00A-5:00P 12:00N- 1:00P	Show Schedule	+ -
03/05/2013 🛐 Select Predefined Schedule 🖵	BASE Q			Show Schedule	+ -
Select Predefined Schedule Use Default Schedule View history of Schedule Assignments, including Save Q Return to Search		🎝 Refresh			

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

	? Help	*
Look Up S	Schedule ID	
	00797 egins with 💌	
Look Up	Clear Cancel Basic Lookup	=
Search Res		-
Schedule ID	Description	
E6HRS	EM-F 6 Hour Day	
E8HRS	EM-F 8 Hour Day	
E9HRS	EM-Th 9 Hour Day	
EF4	EF 4-Hr Day	
EMF10	Elapsed 10-Hr Day	
EMF4	Elapsed 4-Hr Day	
EMF6	Elapsed 6-Hr Day	
EMF8	Elapsed 8-Hr Day	
EMF9	Elapsed 9-Hr Day	
EMTH10	EM-Th 10-Hr Day	
EWF8S6	E W-F8H Sa6H	
	NRA-Bi-Weekly Consolidated	
PMF11/7	P MF11:00P-7:00A NO MEAL BREAK	
PMF11/730	P MF11:00P-7:30A NO MEAL BREAK	
PMF130/10	P MF1:30P-10:00P NO MEAL BREAK	
PMF3/11	P MF3:00P-11:00P NO MEAL BREAK	
PMF3/1130	P MF3:00P-11:30P NO MEAL BREAK	
PMF7/3 PMF7/330	P MF7:00A-3:00P NO MEAL BREAK P MF7:00A-3:30P NO MEAL BREAK	
PMF7/330A	P MF7:00P-3:30A NO MEAL BREAK	
PMF7/4	P MF7:00A-4:00P 11:00A-12:00N	
PMF7/4A	P MF7:00A-4:00P 11:15A-12:15P	
PMF7/4B	P MF7:00A-4:00P 11:30A-12:30P	
PMF7/4C	P MF7:00A-4:00P 11:45A-12:45P	
PMF7/4D	P MF7:00A-4:00P 12:00N-1:00P	
PMF7/4E	P MF7:00A-4:00P 12:15P-1:15P	
PMF7/4F	P MF7:00A-4:00P 12:30P-1:30P	

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

Favorites Main Menu > Manager Self Service >	Time Management	> Manage Schedules	> Assign Work Schedule					
Assign Work Schedule								
	Employee ID:							
Job Title:	Employe	e Record Number: 0						
Assign Schedules		Dere	sonalize Find View All 🖾 🎙	First 🚺 1-2 of	2 🕨 🗈	ast		
Primary Details		<u></u>						
*Effective Date *Assignment Method	Schedule Group	Schedule ID	Description					
03/05/2013 🛐 Use Default Schedule 💌	BASE	PMF8/5	P MF8:00A-5:00P 12:00N- 1:00P	Show Schedule	+	-		
03/05/2013 🛐 Select Predefined Schedule 💌	BASE	PMF830/530	P MF8:30A-5:30P 12:30P- 1:30P	Show Schedule	÷	-		
▷ View history of Schedule Assignments, including default changes								
Save Q Return to Search	st ↓ Next in List	n Refresh						

MANAGE SCHEDULES

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

Favorites Main Menu > Manager Self Service > Time Management		
Main Menu > Manager Self Service >		
J Time Management		
Manage schedules, view and approve reported and payable time, absence and overtime requests	s, exceptions, and more.	
Maintain Time Approvers Maintain Time Approvers	Assign permanent work schedules, change schedules for a day, week, or range of dates. Assign Work Schedule Manage Schedules	Approve Time and Exceptions Approve reported or payable time, overtime and absence requests, and manage exceptions. Reported Time Exceptions Absence Requests
Report Time Report time or request absences. Timesheet Absence Request	Time and Labor Reports Image: Interactive Report Image: Interactive Report Image: Interactive Report Image: Interactive Report	View Time View calendars, balances, forecasted and payable time, accumulators and more. Parable Time Summary Parable Time Detail Absence Request History Absence Balances

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

Favorites Main Menu > Manager Self Service > Time Management	
Main Menu > Manager Self Service > Time Management >	
💋 Manage Schedules	
Assign permanent work schedules, change schedules for a day, week, or range of dates.	
Assign Work Schedule Assign an employee's permanent work schedule.	Manage Schedules Change schedules, swap or copy employee schedules or schedule replacements.

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

Wee	kly Schedules														
🗢 Em	loyee Selection Criteria														
Desci	iption			Value											
Group	ID			HA006	Q										
Empl	ID				٩										
Last	lame				Q										
First	lame				Q										
Cl	ar Selection Criteria	Save Selecti	on Criteria	Get Employees											
	w Instructions														
	winstructions and Schedule Selection														
View		Date:	02/04/2013 🕅 📢	Refresh	Schedule	Group:									
	evious Week		Next Week >>		Schedule 1	Type: Prin	nary 💌								
	oyees For Jose J Martine		Heat House		Jeneuure	The True	idiy 💌		First 🚺 1-10 c						
			Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	First - 1-10 c Sunday	Tetel					
Selec	Name	Job Title	02/04/13	02/05/13	02/06/13	02/07/13	02/08/13	02/09/13	02/10/13	Hours	Empl ID	Empl Rcd Nbr	Department	Department Description	Taskgroup
			0 Hours	0 Hours	0 Hours	0 Hours	0 Hours	0 Hours	0 Hours						
	,	Advisor,									1083077		0064	Educational Psychology	PSNONCATSK
		Academic 2													
				R	2	R	2	2	2						
			0 Hours	0 Hours	0 Hours	0 Hours	0 Hours	0 Hours	0 Hours						
	,	Advisor,									1260809		0064	Educational Psychology	PSNONCATSK
		Academic 1													
	1		R	R	-	2	2	2	R						
			0 Hours	0 Hours	0 Hours	0 Hours	0 Hours	0 Hours	0 Hours						
E	,	Research									0903340		0059	Inst for Urban Education	PSNONCATSK
	Ł	Research Assistant				1		R			0903340		0059	Inst for Urban Education	PSNONCATSK

View Schedule Key

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

Legend						
Planned Absence	1	Holiday	(Scheduled OFF Day	OFF	

ABSENCE REQUESTS

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

WORKFLOW

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

To Approve Absence Requests

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



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

Abse	Absence Requests										
Name											
Click on the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by clicking on the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.											
*Show Req	uests by Status: Pending	 Refresh 									
Absence	Requests										
Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status	Submitted				
		Asst, Teacher Certification	Sick	02/20/2013	02/20/2013	Submitted	02/04/2013				
		Asst, Teacher Certification	Vacation	02/21/2013	02/21/2013	Submitted	02/04/2013				
		Asst, Teacher Certification	Sick	02/05/2013	02/05/2013	Submitted	02/04/2013				
Go To:											

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

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

Request Details

Name

Review the details for this request and either approve, deny or submit for rework. You may also enter optional comments about each approval choice.

Absence Detail		
Start Date:	02/20/2013	
End Date:	02/20/2013	
Absence Name:	Sick	Current Balance: 0.00 **
Reason:	Employee/Self	Projected Bal
Partial Days:	None	
Duration:	8.00 Hour	s
Workflow		
Status:	Submitted	
	Submitted	
Comments		
Requestor Comme	nts:	
Approver Commen	ts:	×.
		//
MDiselaimer: The ours	ant be an an daga pat i	reflect absences that have not been processed.
Approve	Deny	
Go To: View Abs	sence History	R R
<u>View Mo</u>	nthly Calendar	
Pending	Absence Request	
View Abs	sence Balances	2 3
1		

ABSENCE REQUEST CORRECTIONS

Favorites Main Menu > Manager Self Service > Time Management		
Main Menu > Manager Self Service >		
Time Management		
Manage schedules, view and approve reported and payable time, absence and overtime requests	exceptions, and more.	
Maintain Time Approvers Maintain Time Approvers	Manage Schedules Assign permanent work schedules, change schedules for a day, week, or range of dates. Manage Schedules Manage Schedules	Approve Time and Exceptions Approve reported or payable time, overtime and absence requests, and manage exceptions. Reported Time Exceptions Absence Requests
Report Time Report time or request absences. Timesheet Absence Request	Time and Labor Reports Im TL Hierarchy Report Im TL Parable Time Report Im TL Reported Time Report	View Time View calendars, balances, forecasted and payable time, accumulators and more. Parable Time Summary Parable Time Detail Absence Request History
		Absence Balances
Report Time Report time or request absences. Timesheet Report time or request		

Manager Self Service > Time Management > Report Time > Timesheet

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

Title: Asst, Te	eacher Certification	•	Ť	Employe	e Record Nun	nber: 0												
ew By: Time	Period • *Date:	02/13/2013	Refresh		Previous Time		Time Peri											
ported Hours: om 02/13/2013	to 02/26/2013	Scheduled H	lours: 80.00		Previous Emple w all Punch Ty		Employee	<u>,,,,</u>									ſ	1
nesheet 🔳	e Status	In	Lunch	In	Out	Punch Total	Time Re	porting Code	Quantity	Sched Hrs		Time		Time Collection Device ID	Date	-		
Wed 2/13					C	1	171 - Va	▼ ication	8.00) H0060) H0060	Q CST CST	Q		2/13 2/14		+	۱ ۱
71 - Va	cation				8.00		8.00	H0060		CST					2	2/14		-

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

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



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

Time Reporting Code	Quantity	
		3
171 - Vacation	8.00	
B71 - Vacation Adj	-8.00	K

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

Time Reporting Code	Quantity	
•		
171 - Vacation	8.00	
B71 - Vacation Adj	-8.00	
B81 - Sick Adj	8.00	

CREATING AN ABSENCE REQUEST ON BEHALF OF AN EMPLOYEE

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

Favorites Main Menu > Manager Self Service > Time Management		
Main Menu > Manager Self Service >		
Time Management		
Manage schedules, view and approve reported and payable time, absence and overtime requests	, exceptions, and more.	
Maintain Time Approvers Maintain Time Approvers	Manage Schedules Assign permanent work schedules, change schedules for a day, week, or range of dates. Assign Work Schedule Manage Schedules	Approve Time and Exceptions Approve reported or payable time, overtime and absence requests, and manage exceptions. Reported Time Exceptions Absence Requests
Report Time Report time or request absences. Timesheet Absence Request	Time and Labor Reports TL Hierarchy Report TL Parable Time Report TL Reported Time Report	View Time View calendars, balances, forecasted and payable time, accumulators and more. Payable Time Summary Payable Time Detail Absence Request History PAbsence Balances
	Report Time Report time or request absences. I Timesheet Absence Request	

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

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

Request Absence	
Instructions	
Use this transaction to request absences. In order to proceed winformation is required. Please provide the information requested button	
Enter the Effective Date	
Enter the effective date for determining your direct reports. Continue Return to Time Management	As Of: 02/04/2013

- Select the group from the list (3)
 - $\circ \quad \text{Only one group can be selected at a time} \\$

	quest Al ct a Group to	
▼ Inc	tructions	
		I select the Group ID that defines the group of employees from which you c
selec	t the employe	e(s) to process.
Liste	d below are a	II of the Groups that specify as the Group Manager.
Cala	at a Crown	
_	ect a Group ect Group	
	HA010	H0058 0852221 TA
0	HA011	H0058 0085895 TA
0	HA012	H0058 1152489 TA
0	HA013	H0058 0090361 TA
	HA014	H0058 0191261 TA
0	HA015	H0062 0082051 TA
	HA016	H0058 0881298 TA
0	HA031	H0060 0088971 TA
0	HA050	H0062 0152133 TA
0	HA051	H0062 0082106 TA
\odot	HA052	H0062 0083874 TA
0	HA053	H0062 0092183 TA
0	HA054	H0062 0081146 TA
	HA055	H0062 0081562 TA
0	HA056	H0062 0089635 TA
\bigcirc	HA057	H0062 0082437 TA
\odot	HA059	H0062 0084674 TA
\bigcirc	HA05A	H0062 0144155 TA
\odot	HA05B	H0062 0175602 TA
\bigcirc	HA05C	H0062 0696873 TA
\odot	HA05D	H0062 0081539 TA
\bigcirc	HA061	H0063 0082162 TA
\odot	HA062	H0063 0162819 TA
\bigcirc	HA073	H0064 0090572 TA
\odot	HA074	H0064 0082441 TA
\bigcirc	HA086	H0065 0081136 TA
	HA111	H0296 0093039 TA

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

Request Absence Select Employees to Process					
☐ Instructions					
On this page, you'll select the employ who reported to you as of the date yo				ork only with emp	loyees
employees report to this employee. Y indirectly report to you by clicking on t	The 👪 'Org Chart' icon that optionally appears in the list of employees below indicates that other employees report to this employee. You may drill-down into the organization to select employees who indirectly report to you by clicking on these 'Org Chart' icons. You may also navigate back up the organization after drilling-down by clicking on the 🏝 'Drill-Up' icon above the list of employees.				
After you've selected the employee(s)) you'd like to wo	rk with,	click the Continu	e button to contir	nue to
the next step of the process.				<u>Cancel</u>	
Select Employees					
Reports To: Continue			As	Of: 02/04/2013	
Select Employee				ind 📮 First 🚺	A d of A D Loot
Name	<u>Empi ID</u>	Empl Rcd#	Pay Status	HR Status	Jobcode Description
\odot		0	Active	Active	Associate Professor
○ 4		0	Active	Active	Professor
0		0	Active	Active	Asst, Administrative
		0	Active	Active	Exec Dir, CREATE
Continue Return to Time Management					

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

Request Absence						
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.						
Absence Detail						
*Start Date: 02/04/2013 🛐 5						
Filter by Type: All						
*Absence Name: Select Absence Name 💌						
Comments						
Requestor Comments:						
* Required Field						
Go To: View Absence Request History						
View Absence Balances						
Direct Reports						

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

Favorites Main Menu	> Time Reporting > Abse	nce Request				
Request Absence						
Name						
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.						
Absence Detail						
*Start Date:	02/01/2013	View Monthly Schedule				
Filter by Type:	All					
*Absence Name:	All Bereavement Leave					
Comments	FML Leave Other Paid Leave					
Requestor Comments	Paid Release Time					
Requestor Comments	SICK Leave					
* Required Field	Sick Leave Unpaid Leave Vacation Leave					
* Required Field	Unpaid Leave					

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

1	avorites Main Menu	> Time Reporting > Absence	Request
	before submitting or sa	ence osence Name. Then complete the r ave for later your request.	est of the required fields
	Absence Detail		
	*Start Date:	02/01/2013	View Monthly Schedule
	Filter by Type:	All	7
	*Absence Name:	Select Absence Name	
	Comments	Administrative Leave Bereavement Leave	^
	Requestor Comments	Blood Donor Leave CDV Fitness Release Time College Release Time	¥
ľ	* Required Field	Emergency Leave	
	Go To: View Abser	FML Sick FML Unpaid Leave	
	<u>View Abse</u>	EMI Vacation	

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

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

Favorites Main Menu	> Time Reporting > Absence Request				
Request Absence					
Enter Start Date and Ab before submitting or sa	sence Name. Then complete the rest of the required fields /e for later your request.				
Absence Detail					
*Start Date:	2/01/2013 III 8 View Monthly Schedule				
Filter by Type:	AII				
*Absence Name:	Sick Current Bal 165.00				
*Reason:	Select Absence Reason 💌				
Partial Days:	None 9				
Duration:	Hours				
Calculate Durati	on				
Comments					
Requestor Comments:					
* Required Field					
**Disclaimer: The current balance does not reflect absences that have not been processed.					
Save for Later Submit					
Go To: <u>View Absen</u>	<u>ce Request History</u>				
View Absen	ce Balances				

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

Request Absence					
	bsence Name. Then complete the rest of the re ave for later your request.	quired fields			
Absence Detail					
*Start Date:	02/01/2013	View Monthly Schedule			
End Date:	31				
Filter by Type:	All				
*Absence Name:	Sick Current Bal	165.00			
*Reason:	Select Absence Reason 💽	10			
Partial Days:	Child Employee/Self Parent	<u> </u>			
Duration:	Select Absence Reason	11			
Calculate Dura	Spouse				
Comments					
Requestor Comment	s:	×			
* Required Field					
Save for Later	t balance does not reflect absences that have not be Submit 12	en processed.			
	nce Request History				

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



To View an Absence Request

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

Favorites Main Menu > Manager Self Service > Time Management	> View_Time	> Absence Request History
Absence Request History		
Instructions		
View Absence Requests for your employees		
Enter the Effective Date		
Enter the effective date for determining your direct reports.	As Of:	12/18/2013
Continue 1		

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

Absence Request History

Select a Group to Process

Instructions

Select the Group ID for the Employee

	Sele	ct a Group			
Ī	Sel	ect Group			
	\bigcirc	H2034	H0169	TA	
	\bigcirc	H2037	H0169	TA	
	۲	J2002	10109 2	TA	
	\bigcirc	J2023	H0169	TA	
	\bigcirc	J2030	H0169	TA	



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

Absence Request History

Select Employees to Process

Instructions

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

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

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

Cancel

Select Employees					
Reports To: Continue			A	s Of: 01/02/2014	
Select Employee				Find 🔄	First 🚺 1-6 of 6 🚺 Last
Name	Empl ID	Empl Rcd#	Pay Status	HR Status	Jobcode Description
•		0	Active	Active	Police Sergeant
	1	0	Active	Active	Police Sergeant
○3		0	Active	Active	Police Officer
©		0	Active	Active	Police Officer
0		0	Active	Active	Police Sergeant
0	1	0	Active	Active	Police Corporal

Continue

Corrections to Reported Time

Manager Self Service > Time Management > Report Time > Timesheet

- Review time
- Make corrections if necessary

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

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

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

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

• Approve the unapproved reported time

Favorites Main Menu > Manager Self Service > Time Management		
Main Menu > Manager Self Service >		
Time Management		
Manage schedules, view and approve reported and payable time, absence and overtime reques	ts, exceptions, and more.	
Maintain Time Approvers Maintain Time Approvers	Manage Schedules Assign permanent work schedules, change schedules for a day, week, or range of dates. Manage Schedules Manage Schedules	Approve Time and Exceptions Approve reported or payable time, overtime and absence requests, and manage exceptions. Reported Time Exceptions Absence Requests
Report Time Report time or request absences. Timesheet Absence Request	Time and Labor Reports TL Hierarchy Report TL Parable Time Report TL Reported Time Report	View Time View calendars, balances, forecasted and payable time, accumulators and more. Parable Time Detail Absence Request History Absence Balances
Report Time Report time or request absences.		

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

Ausence Request

• Click Get Employees (2)

Report Time

Timesheet Summary

Employee Selection Criteria	and the second
Description	Value 1
Group ID	HA006
Empl ID	Q
Last Name	Q
First Name	Q
Clear Selection Criteria	Get Employees
	Show Schedule Information
View By: Week Date: 02/04/2013	Refresh << Previous Week Next Week >>
Approve Reported Time	
Approve Absence	
Manager Self Service	
Time Management	
- It will bring up a list of employees and a snap shot view of their reported hours, hours to be approved, scheduled hours, approved hours, denied hours
- Click on the Employee Name to access the timesheet.

View By:	View By: Week Date: 01/02/2013 Implementation Fmplowees For Jose J Martinez, Totals From 01/02/2013 - 01/08/2013 K< Personalize Find Implementation												
<u>Name</u>	Job Description	Reported Hours	Hours to be Approved	Scheduled Hours		Reported Absence	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Rcd Nbr		Department Description	Taskgroup
	Advisor, Academic 2	4.00	0.00	0.00			4.00	0.00		0	H0064	Educational Psychology	PSNONCATSK
	Advisor, Academic 1	0.00	0.00	0.00			0.00	0.00		0	H0064	Educational Psychology	PSNONCATSK
	Research Assistant	0.00	0.00	0.00			0.00	0.00		0	H0059	Inst for Urban Education	PSNONCATSK

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

View By: Time Period 💌 *Date: 10/09/2013 🛐 🗱 Refres	<u> << Previous Time Period</u> <u> Next Time Period >></u>
3 Scheduled Hours: 80	<< Previous Employee
5	

- The timesheet will appear
- Review the punches

elect		Day	Date	Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity	Sched Hrs	Taskgroup	Time Zone		
	\bigcirc	Wed	10/9	Approved	3:00:00PM				12.20			8.00	H0169	CST	-	B
	P	Thu	10/10	Approved				3:12:00AM		•		8.00	H0169	CST	-	E
	\bigcirc			Approved	3:00:00PM			11:00:00PM	8.00	•		8.00	H0169	CST	-	E
	\bigcirc	Fri	10/11	Needs Approval	3:01:00PM			11:01:00PM	8.00	•		8.00	H0169	CST	-	E
	\bigcirc	Sat	10/12	New								0.00	H0169	CST	-	E
	\Diamond	Sun	10/13	New						•		0.00	H0169 🔍	CST	-	E
	\bigcirc	Mon	10/14	Approved	6:59:00AM				8.00	•		8.00	H0169	CST	-	E
	\bigcirc			Approved				2:59:00PM		•		8.00	H0169	CST	-	B
	\bigcirc	Tue	10/15	Approved	6:59:00AM			2:59:00PM	8.00	•		8.00	H0169	CST	-	0
	\bigcirc	Wed	10/16	New						•		8.00	H0169	CST	-	1
	\bigcirc	Thu	10/17	Approved	6:59:00AM			4:01:00PM	9.03	•		8.00	H0169	CST	-	1
	\bigcirc	Fri	10/18	New						•		8.00	H0169	CST	-	1
	\bigcirc	Sat	10/19	New						•		0.00	H0169	CST	-	1
	\bigcirc	Sun	10/20	New						•		0.00	H0169	CST	-	1
	\bigcirc	Mon	10/21	New						•		8.00	H0169	CST	-	1
	\bigcirc	Tue	10/22	New						•		8.00	H0169	CST	-	[

Leave Request Adjustments

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



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



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

Time Reporting Code	Quantity			
•			6	
171 - Vacation	8.00			
B71 - Vacation Adj	-8.00	K		

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

Time Reporting Code	Quantity
•	
171 - Vacation	8.00
B71 - Vacation Adj	-8.00
B81 - Sick Adj	8.00

Adjustment by Quantity

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

\bigcirc	Wed	10/16	New			471 - Disciplinary Action	8
						020 - Regular Earnings Bi 132 - Call Out Time 2 471 - Disciplinary Action A76 - College Release Adj A80 - Professional Release Adj A83 - Wellness Leave Adj B01 - Administrative Lv Adj B21 - Bereavement Lv Adj B23 - Emergency Lv Adj B29 - Weather Emergency Lv Adj B41 - Jury Duty Adj B43 - Other Paid Lv Adj B43 - Other Paid Lv Adj B71 - Vacation Adj B81 - Sick Adj B95 - Comp Time @ 1.0 Adj C00 - Marrow Donor Lv Adj C01 - Organ Donor Lv Adj C02 - Blood Donor Lv Adj C31 - Military Lv Adj	1

Missed Punch Correction

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

elect		Dav	Date	Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity	Sched Hrs	Taskgroup	Time Zone	Ē	
	ø	Wed	10/9	Approved	3:00:00PM				12.20			8.00		CST	-	Ŀ
	ø	Thu	10/10	Approved				3:12:00AM				8.00	H0169 🔍	CST	-	Ŀ
	ø			Approved	3:00:00PM			11:00:00PM	8.00	•		8.00	H0169 🔍	CST	-	E
	\bigcirc	Fri	10/11	Needs Approval	3:01:00PM			11:01:00PM	8.00			8.00	H0169 🔍	CST	-	B
	\bigcirc	Sat	10/12	New								0.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Sun	10/13	New						•		0.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Mon	10/14	Approved	6:59:00AM				8.00			8.00	H0169 🔍	CST	-	Ŀ
	\bigcirc			Approved				2:59:00PM				8.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Tue	10/15	Approved	6:59:00AM			2:59:00PM	8.00			8.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Wed	10/16	New								8.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Thu	10/17	Approved	6:59:00AM			4:01:00PM	9.03			8.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Fri	10/18	New								8.00	H0169 🔍	CST	-	B
	\bigcirc	Sat	10/19	New								0.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Sun	10/20	New								0.00	H0169 🔍	CST	-	Ŀ
	\bigcirc	Mon	10/21	New								8.00	H0169 🔍	CST	-	Ŀ
	\mathcal{O}	Tue	10/22	New						 ▼ 		8.00	H0169 🔍	CST	-	B

Adding Comments

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

elect		Day	ate	Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity Sched Hrs	Taskgroup	Time Zone	Time Collection Device ID		
	\Diamond	ad.	4/10	Needs Approval	7:15:00AM	11:30:00AM	12:15:00PM	4:00:00PM	8.00		8.0	0 H0060 🔍	CST		-	B
	Ô	Thu	4/11	Needs Approval	7:30:00AM	11:48:00AM	12:45:00PM	4:30:00PM	8.05	•	8.0	0 H0060 🔍	CST		-	
	\bigcirc	Fri	4/12	Needs Approval	7:05:00AM	11:55:00AM	12:55:00PM	4:05:00PM	8.00		8.0	0 H0060 🔍	CST		-	0
	\bigcirc	Sat	4/13	New						•	0.0	0 H0060 🔍	CST		-	E
	\bigcirc	Sun	4/14	New							0.0	0 H0060 🔍	CST		-	B
	\bigcirc	Mon	4/15	Needs Approval	8:00:00AM	12:00:00PM	1:10:00PM	4:30:00PM	7.33		8.0	0 H0060 🔍	CST		-	B
	\bigcirc	Tue	4/16	Needs Approval	7:15:00AM	11:00:00AM	12:00:00PM	4:15:00PM	8.00		8.0	0 H0060 🔍	CST		-	B
	\bigcirc	Wed	4/17	Needs Approval	7:30:00AM	11:30:00AM	12:30:00PM	4:30:00PM	8.00		8.0	0 H0060 🔍	CST		-	B
	\bigcirc	Thu	4/18	Needs Approval	7:15:00AM	11:45:00AM	2:00:00PM	4:05:00PM	6.58		8.0	0 Н0060 🔍	CST		-	B
	\bigcirc	Fri	4/19	Needs Approval	7:15:00AM	12:00:00PM	1:00:00PM	4:00:00PM	7.75		8.0	0 H0060 🔍	CST		-	B
	\bigcirc	Sat	4/20	New							0.0	0 H0060 Q	CST		-	E
	\bigcirc	Sun	4/21	New						•	0.0	0 H0060 🔍 🔍	CST		-	0
	\bigcirc	Mon	4/22	Needs Approval	7:20:00AM	11:00:00AM	12:00:00PM	4:15:00PM	7.91		8.0	0 H0060 🔍	CST		-	B
	\bigcirc	Tue	4/23	Needs Approval	7:15:00AM	12:00:00PM	1:00:00PM	4:15:00PM	8.00		8.0	0 нообо 🔍 🔍	CST		-	B
2 <u>S</u> e	elect /		Deselect A	<u>All</u>												
	Apply	y Rules		Clear												
Re	eporte	d Hours	Summary	- select to view												
Ba	lance	s - sele	<u>ct to view</u>													

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

Favorites Main N	1enu > Manager S	elf Service > Tir	ne Management	> R	eport Time	>	Timesheet	
Comments)							
Date Under Repo	ort: 10/20/2013							
							Personalize Find View All 🗖 🛗	First 🚺 1 of
								1 🖸 Last
Operator Id	DateTime Created	Source	Comment					
	10/22/2013							
1	11:34AM	Time Reporting						+
					•			
Cau	Consol							
Save	Cancel						2	
~								
	3							

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

Message			0.00000400	141100
Enter comments in the Comments Section.	Comments must be entered to Submit	requested	change(s) to the ti	mesheet
	ОК			

APPROVING REPORTED TIME

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

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

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

Review Reported Time to be Approved in PeopleSoft

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

Favorites Main Menu > Manager Self Service > Time Management			
Main Menu > Manager Self Service >			
J Time Management			
Manage schedules, view and approve reported and payable time, absence and overtime requests,	exceptions, and more.		
Maintain Time Approvers Maintain Time Approvers	Manage Schedules Assign permanent work schedules, change schedules for a day, week, or range of dates. <u>Assign Work Schedule</u> <u>Manage Schedules</u>	Approve Time and Approve reported or pa Reported Time Exceptions Absence Requests	yable time, overtime and absence requests, and manage exception
Report Time Report time or request absences. In <u>Timesheet</u> Absence Request	Time and Labor Reports In Literactiv Report In L Payable Time Report In L Reported Time Report	View Time View calendars, balan Payable Time Sum Absence Request Absence Balances	1
<u>Main Menu > Manager Self Service > Time Management ></u>			
Approve Time and Exceptions			
Annrove reported or navable time_overtime and absence requests_and manage	eventions		
Reported Time Approve reported time and task details for a day, week, or time period.	Approve payable time.		Exceptions Manage exceptions for a group of time reporters.
Absence Requests Approve, deny or push back an employee's absence request.	Override Rules Override rules by Date Under Report for the selected time re	porter.	

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

Favorites Main Menu > Manager Self Service > Time	${\tt Management} \hspace{0.1 in} > \hspace{0.1 in} {\tt Approve Time and Exceptions} \hspace{0.1 in} > \hspace{0.1 in} {\tt Reported Time}$	
Approve Reported Time		
Timesheet Summary	1	
Employee Selection Criteria Description		
Group ID	HA006	
· ·		
Empl ID		
Last Name	Q.	
First Name	Q	
Clear Selection Criteria Save Selection Criteria	Get Employees	
0	4	
There were no employees found with Reported Time to a selection criteria.	pprove based upon your	
selection chiena.	Show Schedule Information	
View By: Week Date: 03/05/2013		
View By: Week Date: 03/05/2013	Kefresh << Previous Week <td>Next Week >></td>	Next Week >>
Report Time		
Manager Self Service	3	
Time Management		
2		

Andread Man	a) (1)	Job Determine	Houce, ba, bet Assessment	Reported Norce	Scheduled Loos Black	Abberror ption to be Approved	Assessed Submitted Bosts	Desied Absca	Emailsons E	Rol Deaxtment	Department Department	Inchaston
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oprove Seller	Sed Deny Se	cetter.										

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

Review Payable/Reported Time by Week

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

Favorites Main Menu > Manager Self Service > Time Management											
Main Menu > Manager Self Service >											
Time Management											
Manage schedules, view and approve reported and payable time, absence and overtime requests, exceptions, and more.											
Maintain Time Approvers Maintain Time Approvers	Manage Schedules Assign permanent work schedules, change schedules for a day, week, or range of dates. <u>Assign Work Schedule</u> Manage Schedules	Approve Time and Exceptions Approve reported or payable time, overtime and absence requests, and manage exceptions. Reported Time Exceptions Absence Requests									
Report Time Report time or request absences. In <u>Timesheel</u> Absence Request	Time and Labor Reports Im TL Hierarchy Report Im TL Parable Time Report Im TL Reported Time Report	View Time View calendars, balances, forecasted and payable time, accumulators and more. Payable Time Summary Payable Time Detail Absence Request History Absence Request History Absence Relances									
Favorites Main Menu > Manager Self Service > Time Management >	View Time										
Main Menu > Manager Self Service > Time Management >											
💋 View Time											
View calendars, balances, forecasted and payable time, accumulators and more.											
Payable Time Summary View a summary of an employee's payable time.	Payable Time Detail View details of an employee's payable time.	View Asymptotic Time View a summary of employee's payable time and associated time reported									
Absence Request History View an employee's absence request history.	Absence Balances View an employee's absence balances.	Exceptions History View a time reporter's history of archived time exceptions.									

• Group ID: Enter your Group ID (1)

Approx Approx Recort I Manager Jone Ma

- Get Employees: Click "Get employees" to generate a list based on the criteria you selected. (2)
- Select Employee: Click on the name of the employee. View Payable/Reported Time. (3)

	r Emb	oloye	e							1
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EXCEPTIONS

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

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

ADDING COMMENTS

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

	sheet														Time Collection		
elect	0	Day	Date	Status Needs	In			Out		Time Reporting Code	Quantity		Taskgroup	Time Zone	Device ID		
	5	wed	4/10	Approval	7:15:00AM	11:30:00AM	12:15:00PM	4:00:00PM	8.00	•		8.00	H0060	CST			+
	Q,	Thu	4/11	Needs Approval	7:30:00AM	11:48:00AM	12:45:00PM	4:30:00PM	8.05			8.00	H0060	CST		-	+
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	\bigcirc	Sun	4/14	New								0.00	H0060	CST		-	+
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	\bigcirc	Thu	4/18	Needs	7:15:00AM	11:45:00AM	2:00:00PM	4:05:00PM	6.58			8.00	H0060 C	CST		-	B
	Q	Fri	4/19	Needs Approval	7:15:00AM	12:00:00PM	1:00:00PM	4:00:00PM	7.75			8.00	H0060	сят		-	÷
	\Diamond	Sat	4/20	New						•		0.00	H0060 C	CST		Ξ	(+
	Q	Sun	4/21	New								0.00	H0060 C	CST		-	H
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	\bigcirc	Tue	4/23	Needs Approval	7:15:00AM	12:00:00PM	1:00:00PM	4:15:00PM	8.00			8.00	H0060 G	CST		-	H
<u>Re</u> Bal	Apply ported ances Sub	r Rules d Hours s - sele	Summary	Clear - select to view Approve Selecte	d Der	ly Selected											

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

Favorites Main M	lenu > Manager S	elf Service > Tin	me Management	>	Report Time	>	Timesheet	
Comments	i							
Date Under Repo	rt: 10/20/2013							
							Personalize Find View All 🔁 🛗 First 1	1 of Last
Operator Id	DateTime Created	<u>Source</u>	Comment					
1	10/22/2013 11:34AM	Time Reporting						+
Save	Cancel						2	

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

Message			0.00000400	14 100
Enter comments in the Comments Section.	Comments must be entered to Submit	requested	I change(s) to the ti	imesheet
	OK			

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

Options 1: Review Exceptions in PeopleSoft:

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

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

Favorites Main Menu	$_{>}$ Manager Self Service $_{>}$	Time Management >	Approve Time and	Exceptions > Exceptions	ceptions
	•	*	*	🖉 New W	/indow
Manage Except	tions				
 Employee Selection Cr 	пепа	Value			
Description		HL030			
Group ID		HL030			
Empl ID			Q		
Clear Selection Criteri	ia Save Selection Criteria	Get Employees			
View Instructions					
➡ Filter Options					
Date Filter:	between	✓ Start Date	: 06	6/18/2013	
		End Date:	06	6/25/2013	
Employee Filter:	equal to	✓ Employee	ID:		
Exception Filter:	equal to	 Exception 	ID:		
Severity:	High	\sim			
Run Control ID:				ОК	

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

	Exceptions Overview Details FFF											
Allow	Pay Group	Exception ID	Description	<u>Date</u>	Name	Source						
	HBW	TLX10064	Invalid punch order	06/25/2013		Time Administration						
	HBW	TLX10064	Invalid punch order	06/20/2013		Time Administration						

TRAM TIME & PAYROLL APPROVER GLOSSARY:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

<u>Reported Time:</u> is the time entered by time reporters and managers.

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

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

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

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

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

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

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

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

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

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

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

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

TRAM Reports

Navigation:

Manager Self Service > Time Management > TRAM Reports

1. TRAM Absence Report

Review Absence Requests

Purpose

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

Run Parameters

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

Process Name: UPAY204

2. TRAM Available Leave Report

Review Leave Balances

Purpose

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

Run Parameters

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

Process Name: UPAY207

3. TRAM Absence Audit Report

Review Absence Request Transactions **Purpose**

- Displays Absence Requests, including hours, by Employee and detailed Workflow Transaction History
- Provides Absence Request Workflow Transaction History for a pay period by Employee, Empl Rcd #
- Provides Absence Request Workflow Transaction History to research approvals and discrepancies

Run Parameters

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

Process Name: UPAY208

4. TRAM Time Report

Evaluate Reported Time to Payable Time

Purpose

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

• Identifies Payable Time to be approved and Payable Time Rejected by Payroll **Run Parameters**

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

Process Name: UPAY205

5. TRAM Time Audit Report

Review Time Approver Corrections

Purpose

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

Run Parameters

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

Process Name: UPAY206

6. TRAM Hierarchy Report

Review Time Reporter assignment to TAs and PAs

Purpose

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

Run Parameters

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

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

Process Name: UPAY160

Helpful Queries

HRMS_AM_LV_RQS_PND_APR_DEPT

Absence Requests Pending Approval by Division, College, or Department ID Prompts:

Leave Begin Date Leave End Date Div/Coll/Dept # (Leave Begin/End Dates are based upon Absence Request Begin Dates)

HRMS_TR_BW_RT_NA_BY_DEPT

Bi-Weekly Reported Time Pending Approval by Division, College, or Department ID Prompts:

TR Report Date >= TR Report Date <= Div/Coll/Dept # (Enter Pay Period Begin and End Dates for TR Report Dates)

HRMS_TR_MO_RT_NA_BY_DEPT

Monthly Reported Time Pending Approval by Division, College, or Department ID Prompts:

TR Report Date >= TR Report Date <= Div/Coll/Dept # (Enter Pay Period Begin and End Dates for TR Report Dates)

HRMS_TR_BW_PT_NA_BY_DEPT

Bi-Weekly Payable Time Pending Approval by Division, College, or Department ID Prompts:

TR Report Date >= TR Report Date <= Div/Coll/Dept # (Enter Pay Period Begin and End Dates for TR Report Dates)

HRMS_TR_MO_PT_NA_BY_DEPT

Monthly Payable Time Pending Approval by Division, College, or Department ID Prompts:

TR Report Date >= TR Report Date <= Div/Coll/Dept # (Enter Pay Period Begin and End Dates for TR Report Dates)