PSHR WMU Manager Self Service ~ User Guide 9.2 PeopleSoft

December 2019

Western Michigan University
Human Resources
1270 Seibert Administration Building
(269) 387-3620
hr-hris@wmich.edu

TABLE OF CONTENTS

Overview

Manager Self Service is a PeopleSoft web-based application designed to assist managers with their employee-related tasks. It is available 24 hours-a-day providing immediate access to your team's information. Along with the Management Data report, Manager Self Service will reduce your dependence on HR and Payroll and provide a consolidated view of your team's data.

Manager Self Service allows departments to submit on line transactions in lieu of paper transaction forms. The Self Service process includes routing approval points and automatic update of the PeopleSoft job panels. Departments can also track the routing and entry of submitted forms, allowing for better xxxxx.

Requesting User Access

To process a **PSHR WMU Electronic Workflow Form**, you must have online security access to the PeopleSoft WMU Workflow panels.

To obtain security access to the PeopleSoft WMU Workflow panels, complete and submit the **PSHR WMU Electronic Workflow Web Access Authorization** form located at: http://www.wmich.edu/hr/forms/access. Once you have been authorized, an e-mail will be sent to you with sign-on information.

If you are unable to access the authorization form, or if you have questions regarding user access, please contact Genny Ludwig at genevieve.ludwig@wmich.edu or 387-2984.

Web Browser Requirements

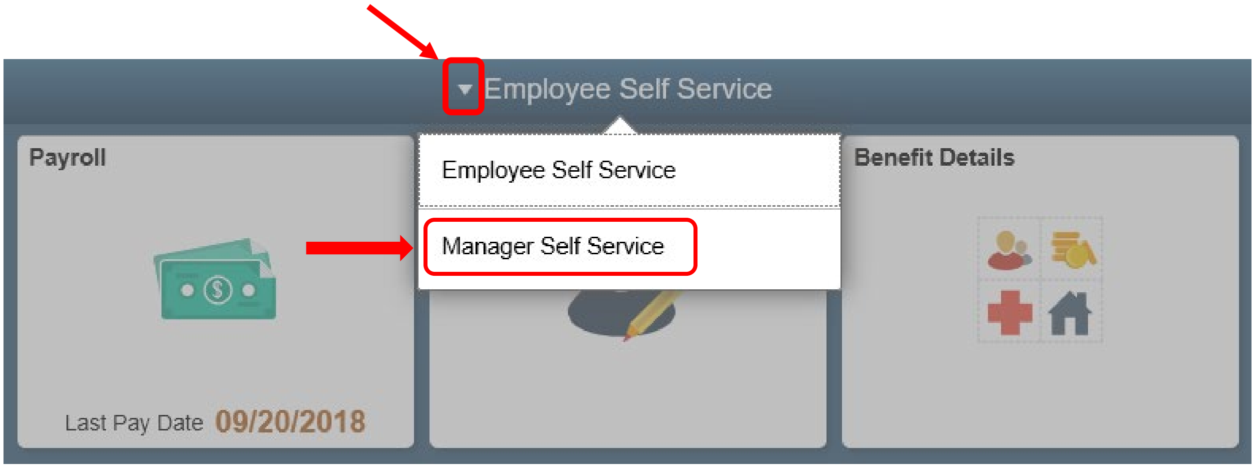
The PSHR WMU Electronic Workflow works best with Internet Explorer version 11.0. If you are using a Mac, the Safari browser seems to work best.

Accessing the Manager Self-Service Homepage

Access PeopleSoft Manager Self Service by logging in through the GoWMU portal at: gowmu.wmich.edu. Sign in using your Bronco NetID and password

Use this path to get to the PeopleSoft landing page:
Faulty/Staff Home > My Self Service > Employee Self Service

Managers will first see the Employee Self Service homepage. To navigate to the Manager Self Service homepage, select the down arrow next to Employee Self Service and select Manager Self Service.

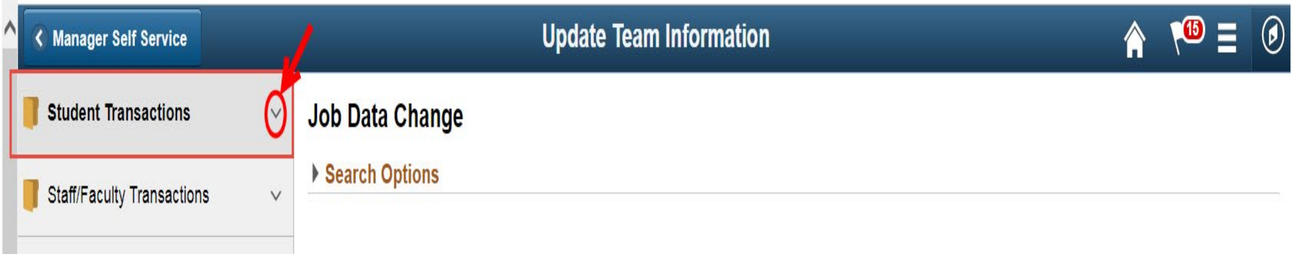


The Manager Self Service homepage will appear.

The Approvals Tile holds the HR personnel transactions that are pending the manager's approval. Managers will access this tile to approve or deny pending transactions.	The WMU Manager Tools Tile contains helpful tools the manager can use to monitor the personnel transaction process. The manager will access this tile to review transactions they have submitted, approved, denied or are pending their review.	The Update Team Information Tile contains a list of the manager's direct and indirect reports including vacant positions. Managers will access this tile to process HR personnel transactions for their direct reports.

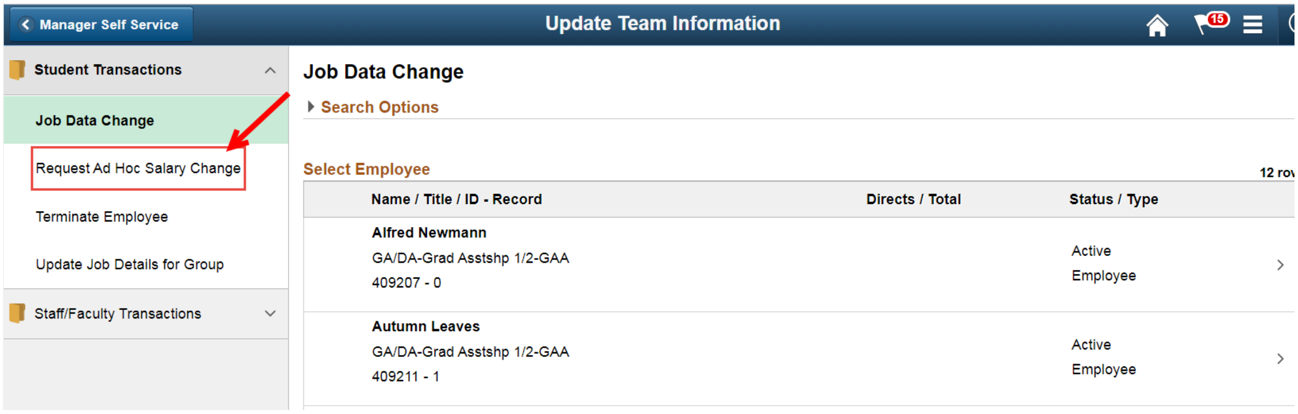
The Update Team Information Tile contains a list of the manager's direct and indirect reports including vacant positions. Managers will access this tile to process HR personnel transactions for their direct reports.

Manager Self Service (MSS) – Submitting AD HOC PAY CHANGES

Process Overview – AD HOC SALARY (PAY) CHANGE	PeopleSoft Manager Self Service allows departments to submit pay change transactions for its employees online. However, discussions on pay should occur within the department and with other appropriate departments and agreed upon BEFORE any submission of pay change transactions
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the 'Update Team Information' tile 
STEP 2	The 'Update Team Information Panel will appear. At the left side of the panel, select the 'Student Transactions' option & click on the down arrow to get the transaction options available 

STEP 3

Once the Transaction options appear, click on ‘Request Ad Hoc Salary Change’



Job Data Change

Search Options

Select Employee

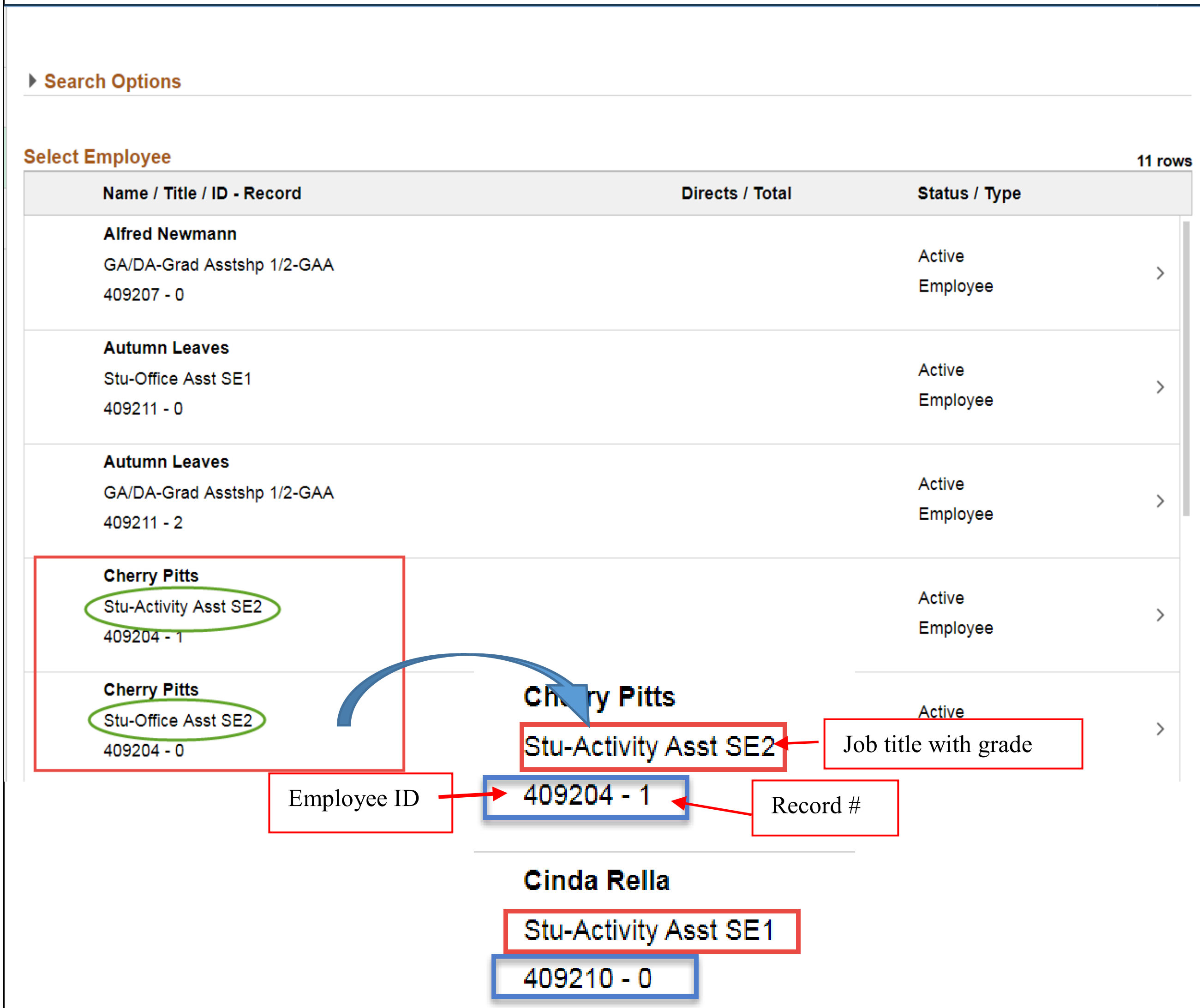
12 rov

Name / Title / ID - Record	Directs / Total	Status / Type
Alfred Newmann GA/DA-Grad Asstshp 1/2-GAA 409207 - 0		Active Employee
Autumn Leaves GA/DA-Grad Asstshp 1/2-GAA 409211 - 1		Active Employee

STEP 4

Be sure to choose the correct employee AND the correct job (some employees have multiple appointments in the same department).

- Click anywhere on the employee line



Search Options

Select Employee

11 rows

Name / Title / ID - Record	Directs / Total	Status / Type
Alfred Newmann GA/DA-Grad Asstshp 1/2-GAA 409207 - 0		Active Employee
Autumn Leaves Stu-Office Asst SE1 409211 - 0		Active Employee
Autumn Leaves GA/DA-Grad Asstshp 1/2-GAA 409211 - 2		Active Employee
Cherry Pitts Stu-Activity Asst SE2 409204 - 1		Active Employee
Cherry Pitts Stu-Office Asst SE2 409204 - 0		Active

STEP 5

After selecting the employee, the ‘WMU Request Ad Hoc Salary Change’ detail page will appear.
PLEASE NOTE:

- To cancel the transaction, the manager can select the exit button in the top left corner to exit the transaction and return to the Team page.
- When the page first appears, the CURRENT pay rate will appear in the ‘New Amount (New Pay Rate) box – it will need to be changed (see below)

STEP 6

Enter the pay change (transaction) effective date ❶

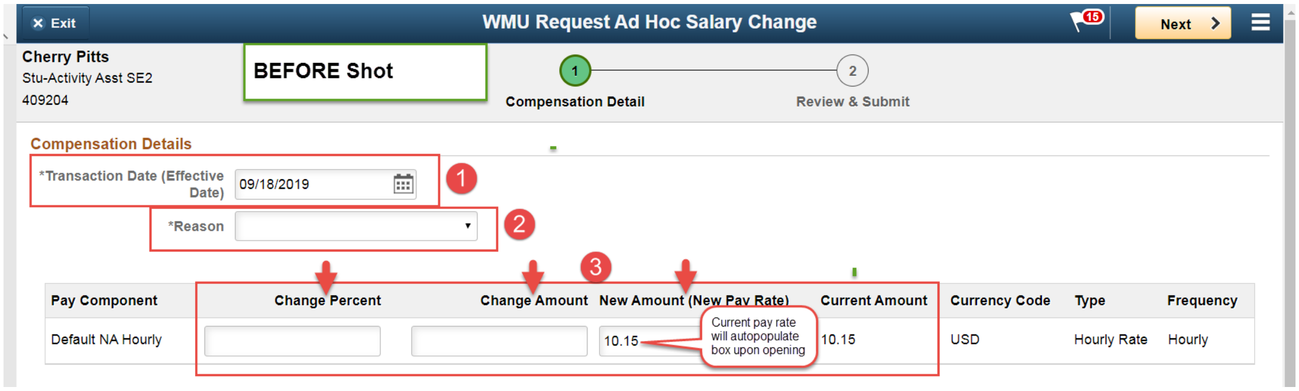
- ○ This date should be the date the pay change is taking place

Enter the Pay Change reason ❷

- ○ Click on the ‘down’ arrow and select the pay change reason
- ○ For STUDENTS, ONLY use reason ‘ Adjustment’ – this will AUTOPOPULATE for you

Enter the new pay rate. There are three options on how to make the change ❸

- ○ Enter a change percent – if you want to increase the person’s pay rate, for example, by 2%, then enter 2.0 in the ‘Change Percent’ box.
- ○ Enter a Change amount figure – if you want to increase a person’s pay by $0.25 per hour, enter .25 in the ‘Change Amount’ box
- ○ Enter the new pay Rate – if you have a specific pay rate you want, enter the new rate in the ‘New Amount (New Pay Rate)’ box. Please NOTE that the employee CURRENT RATE will populate the New Amount box ~ you must enter a new rate here if you are using this option to make the pay change.



Cherry Pitts
Stu-Activity Asst SE2
409204

BEFORE Shot

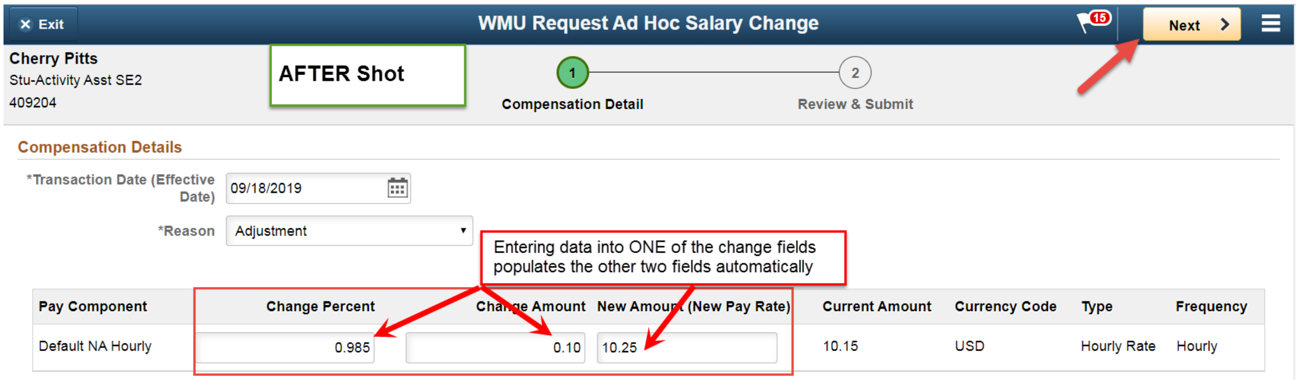
Compensation Details

*Transaction Date (Effective Date) 09/18/2019

*Reason

Pay Component	Change Percent	Change Amount	New Amount (New Pay Rate)	Current Amount	Currency Code	Type	Frequency
Default NA Hourly			10.15	10.15	USD	Hourly Rate	Hourly

Current pay rate will autopopulate box upon opening



Cherry Pitts
Stu-Activity Asst SE2
409204

AFTER Shot

Compensation Details

*Transaction Date (Effective Date) 09/18/2019

*Reason Adjustment

Entering data into ONE of the change fields populates the other two fields automatically

Pay Component	Change Percent	Change Amount	New Amount (New Pay Rate)	Current Amount	Currency Code	Type	Frequency
Default NA Hourly	0.985	0.10	10.25	10.15	USD	Hourly Rate	Hourly

Once you are comfortable that the information is correct, click the ‘Next’ button at the top right corner of the panel. This will take you to the ‘Review and Submit’ page.

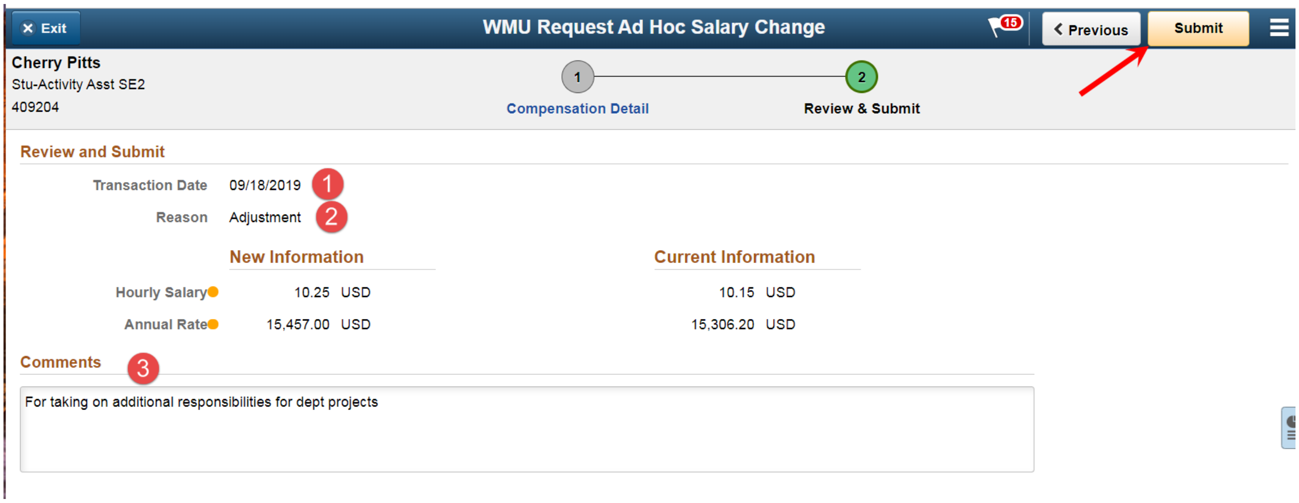
STEP 7

Review Data & Submit Form

- Verify the effective date ❶
- Verify the Pay Change reason is “Adjustment’ ❷
- Add Comments for documentation & clarification ❸

If everything looks good, click the ‘Submit’ button at the top right corner

- If you need to change data, click the ‘Exit’ button at the top left corner to take you back to the Update page



Cherry Pitts
Stu-Activity Asst SE2
409204

Review and Submit

Transaction Date 09/18/2019 ①
Reason Adjustment ②

	New Information	Current Information
Hourly Salary	10.25 USD	10.15 USD
Annual Rate	15,457.00 USD	15,306.20 USD

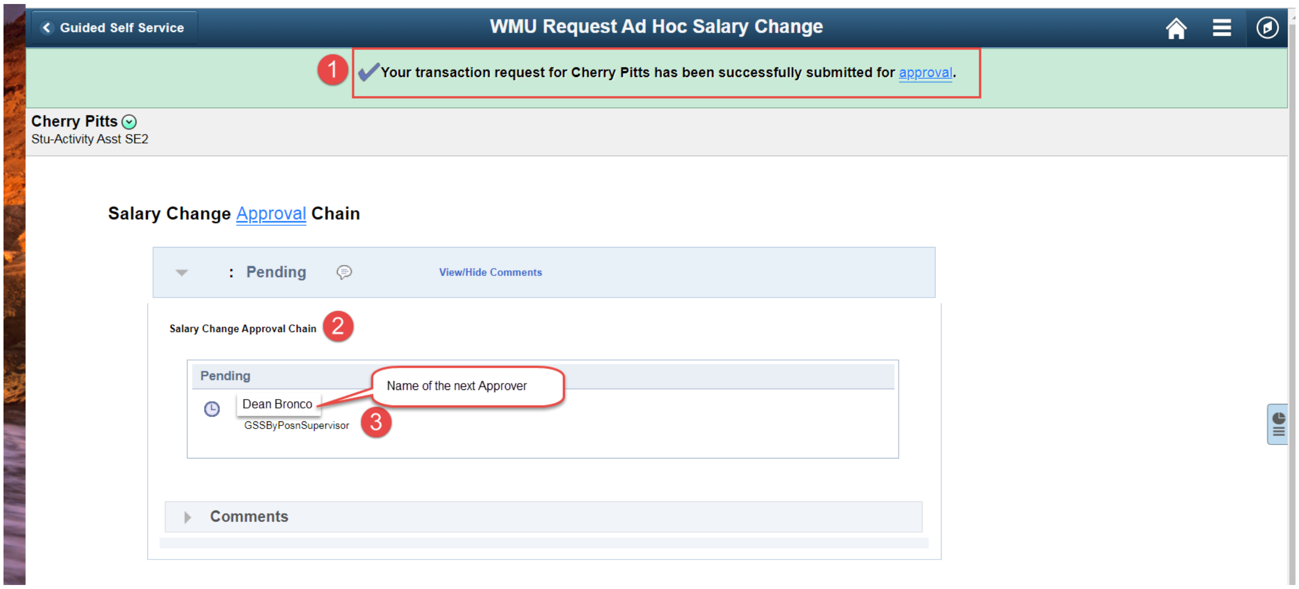
Comments ③

For taking on additional responsibilities for dept projects

STEP 8

Success Message should appear

- If the Transaction was successfully submitted, you should see a message appear on the submission page ❶
- You will also see the next person in the form approval chain ❷ & ❸



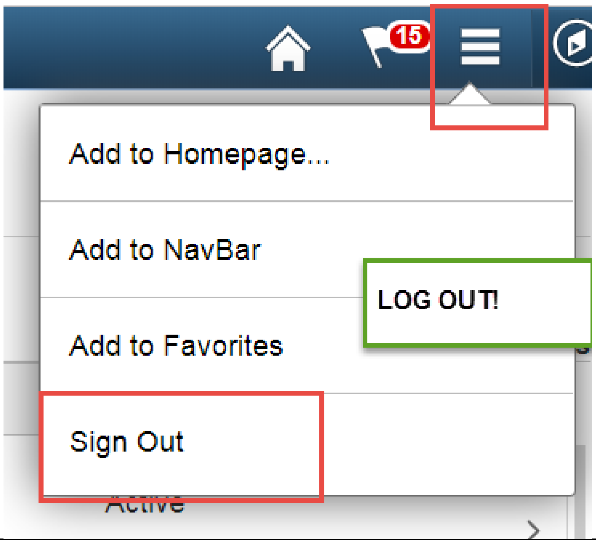
① ✓ Your transaction request for Cherry Pitts has been successfully submitted for approval.

Cherry Pitts
Stu-Activity Asst SE2

Salary Change Approval Chain

Salary Change Approval Chain ②

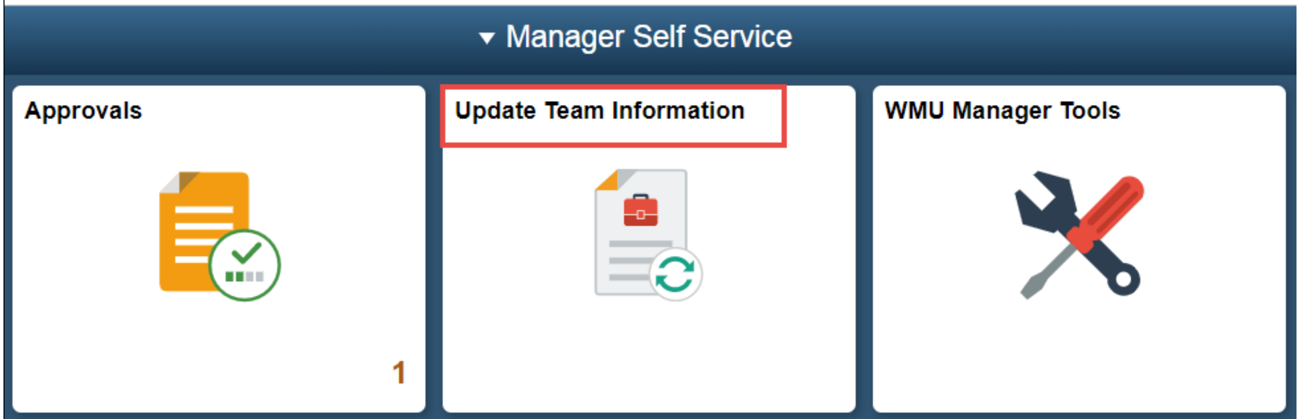
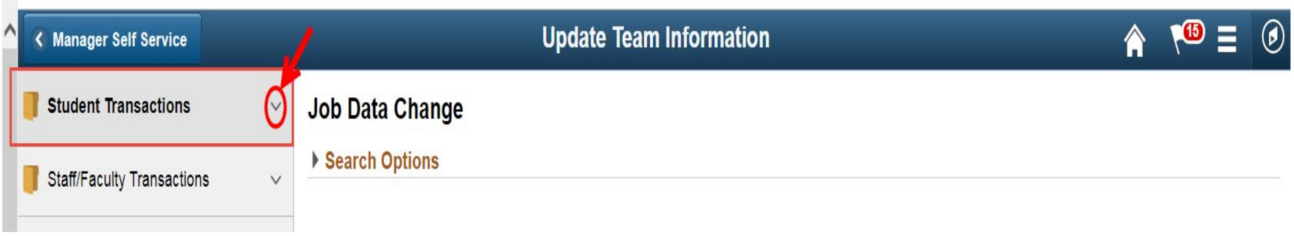
Pending
Dean Bronco
GSSByPosnSupervisor ③

STEP 9	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click ‘Sign Out’ 

HELPFUL HINTS - INITIATION

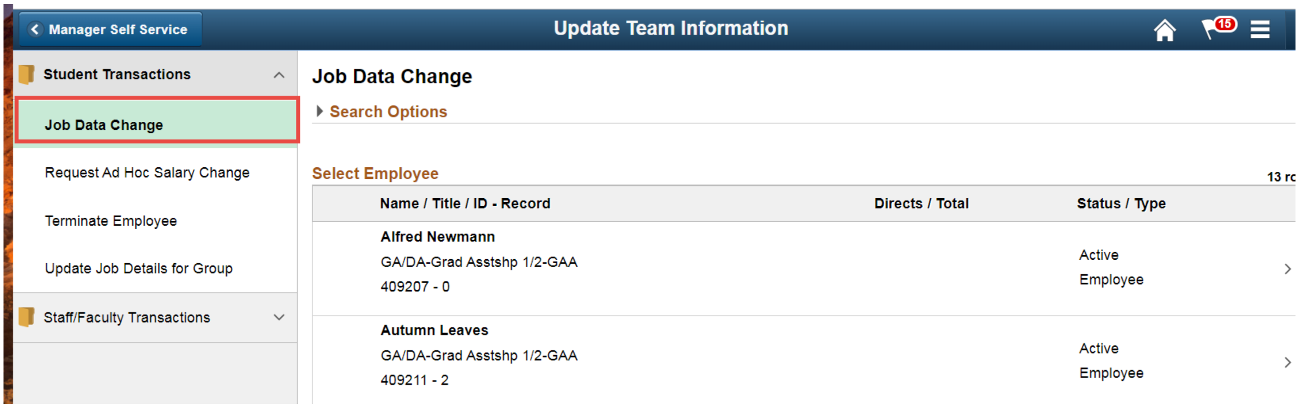
- When you are entering data to the form, you can get online help quickly by clicking on the Decision Support icon.

Manager Self Service (MSS) – Submitting JOB CHANGES

Process Overview – JOB CHANGES	PeopleSoft Manager Self Service allows departments to submit job change transactions for its employees online. For students, the following transactions are available: • Cost Center (e.g. Dept) change • Location change • Job code change
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the 'Update Team Information' tile 
STEP 2	The 'Update Team Information Panel will appear. At the left side of the panel, select the 'Student Transactions' option & click on the down arrow to get the transaction options available 

STEP 3

Once the Transaction options appear, click on ‘Job Data Change’



Job Data Change

Search Options

Select Employee

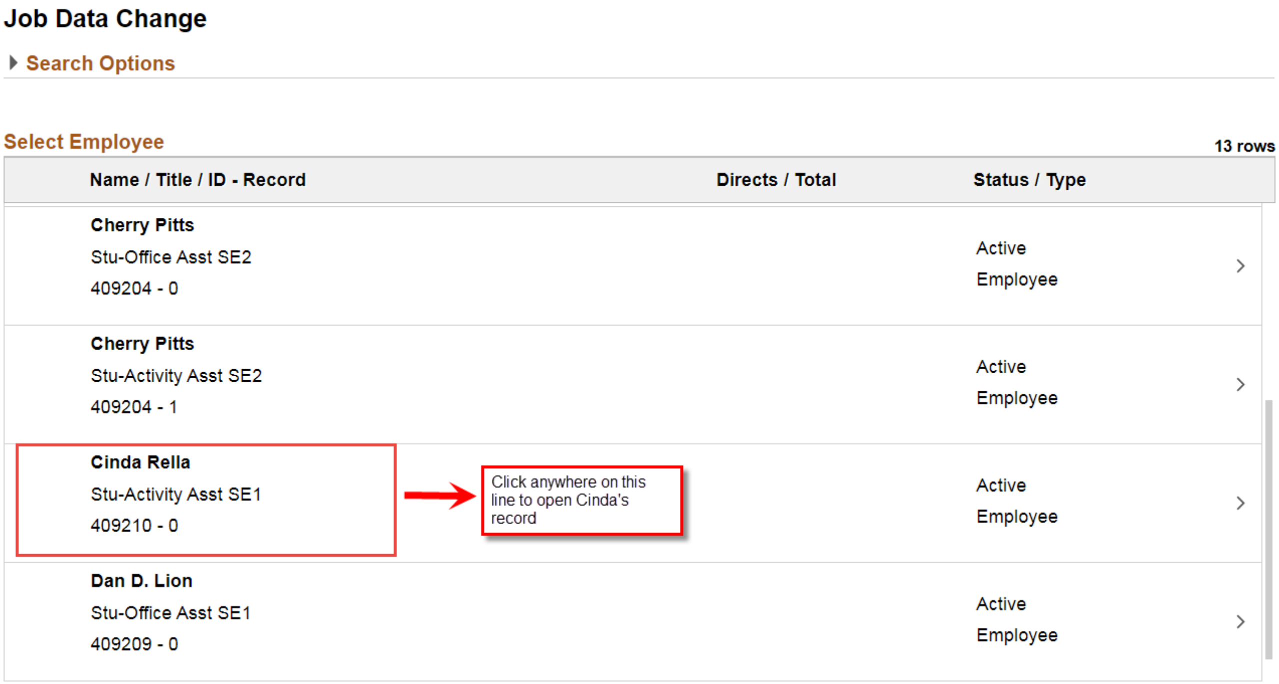
13 rc

Name / Title / ID - Record	Directs / Total	Status / Type
Alfred Newmann GA/DA-Grad Asstshp 1/2-GAA 409207 - 0		Active Employee
Autumn Leaves GA/DA-Grad Asstshp 1/2-GAA 409211 - 2		Active Employee

STEP 4

Be sure to choose the correct employee AND the correct job (some employees have multiple appointments in the same department).

- Click anywhere on the employee line



Job Data Change

Search Options

Select Employee

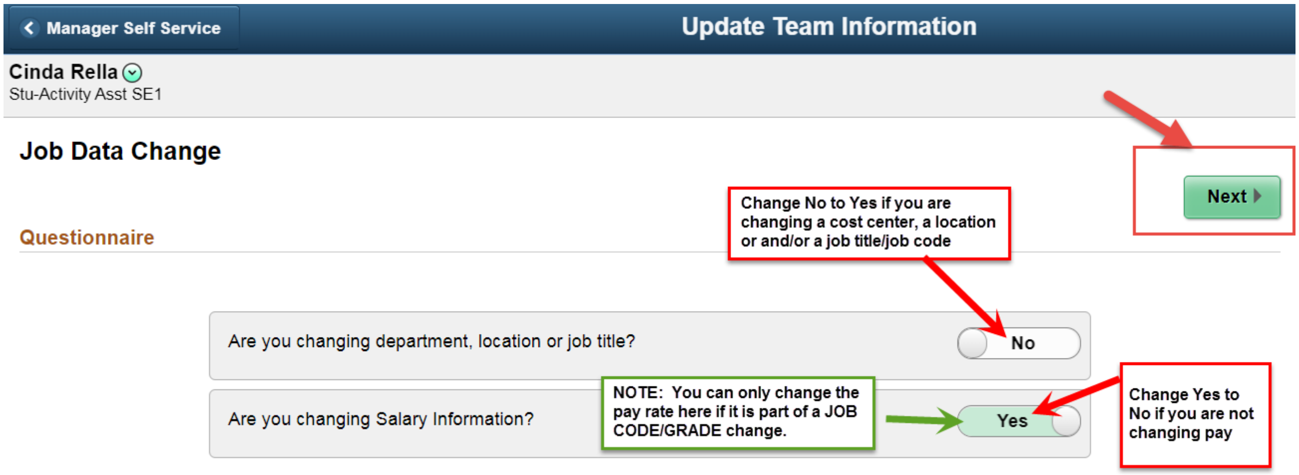
13 rows

Name / Title / ID - Record	Directs / Total	Status / Type
Cherry Pitts Stu-Office Asst SE2 409204 - 0		Active Employee
Cherry Pitts Stu-Activity Asst SE2 409204 - 1		Active Employee
Cinda Rella Stu-Activity Asst SE1 409210 - 0		Active Employee
Dan D. Lion Stu-Office Asst SE1 409209 - 0		Active Employee

Click anywhere on this line to open Cinda's record

STEP 5

The Job Data panel will appear:



Manager Self Service — **Update Team Information**

Cinda Rella
Stu-Activity Asst SE1

Job Data Change

Questionnaire

Are you changing department, location or job title? No

Are you changing Salary Information? Yes

To initiate the change for:

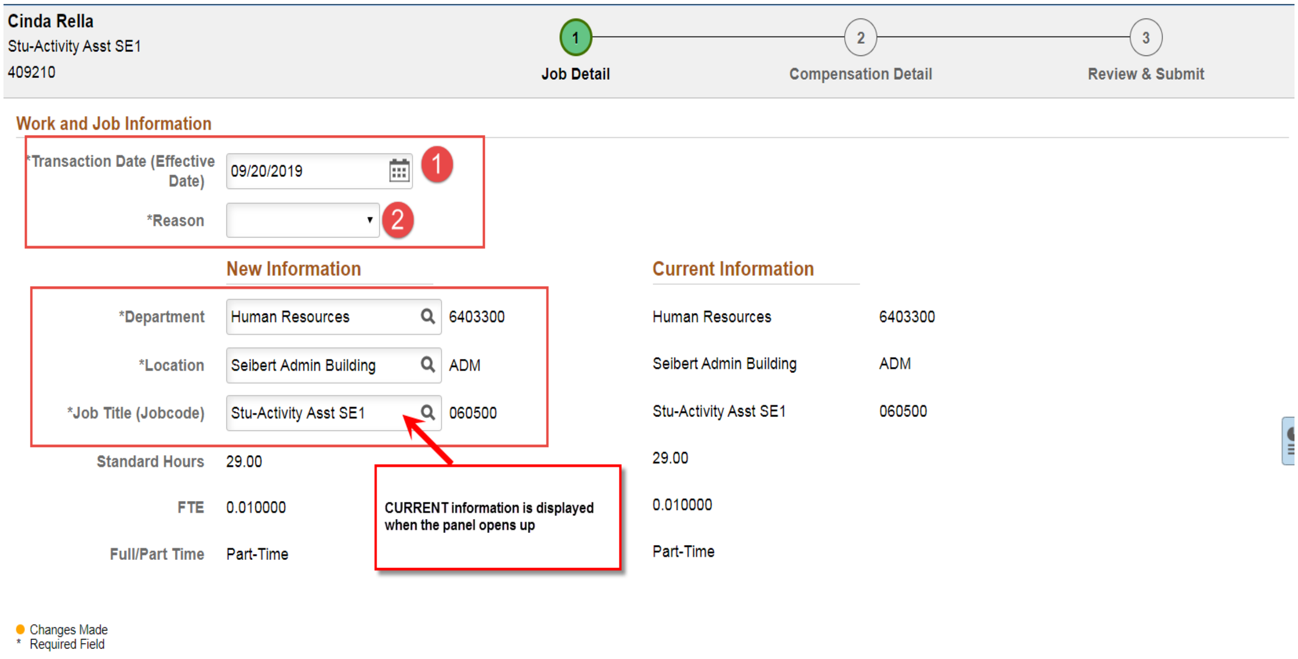
- A cost center change – click the ‘Yes’ option on the top option box
- A title (job code) change only – click the ‘Yes’ option on the top option box
- A grade change (e.g. SE1 to SE2) – click the ‘Yes’ option on the top box
    - A grade change will need an accompanying pay change, so ALSO click the ‘Yes’ option om the bottom option box
    - NOTE: Pay changes with no grade or title change should be processed via the ‘Request Ad hoc Salary Change’ transaction option

Click the ‘Next’ button to take you to the change page

STEP 6

Enter the job change effective date ❶
- This date should be the day the change(s) take place

Enter the action reason ❷
- Click on the ‘down’ arrow and select the reason
- For STUDENTS, ONLY use action ‘ Manager Request’



Cinda Rella
Stu-Activity Asst SE1
409210

Work and Job Information

*Transaction Date (Effective Date) 09/20/2019 ①

*Reason ②

	New Information		Current Information	
*Department	Human Resources	6403300	Human Resources	6403300
*Location	Seibert Admin Building	ADM	Seibert Admin Building	ADM
*Job Title (Jobcode)	Stu-Activity Asst SE1	060500	Stu-Activity Asst SE1	060500
Standard Hours	29.00		29.00	
FTE	0.010000		0.010000	
Full/Part Time	Part-Time		Part-Time	

● Changes Made
* Required Field

STEP 7

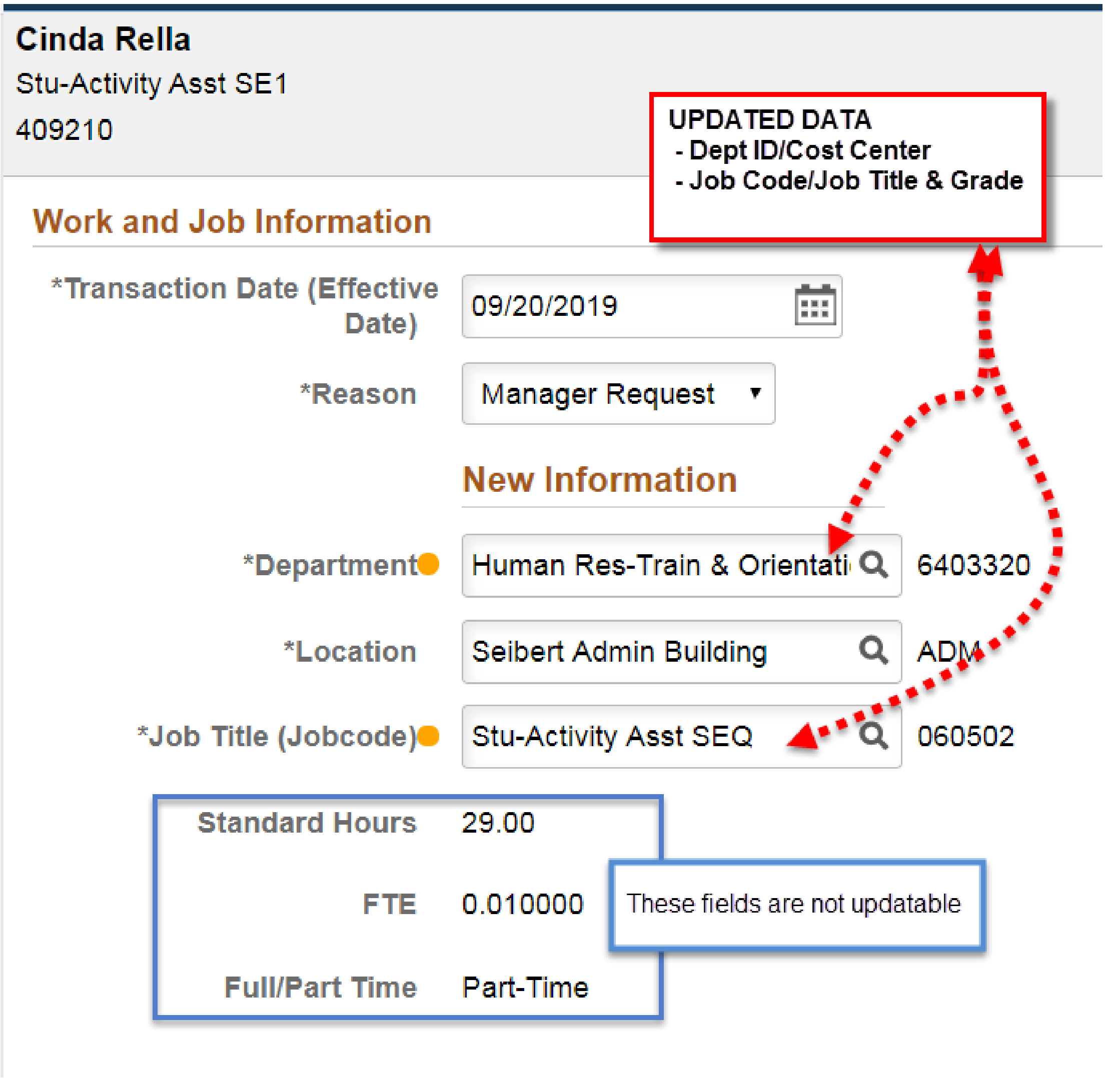
UPDATE the appropriate fields

- NOTE: The current data is displays when the page first opens.

STEP 8

EXAMPLE: Updating Department (cost center) and Job Title (Job Code)

- Use the ‘Search glass’ to fine the department cost center and/or the title
    - See instructions on how to use the search functions



Cinda Rella

Stu-Activity Asst SE1

409210

UPDATED DATA
- Dept ID/Cost Center
- Job Code/Job Title & Grade

Work and Job Information

*Transaction Date (Effective Date): 09/20/2019

*Reason: Manager Request

New Information

*Department: Human Res-Train & Orientati 6403320

*Location: Seibert Admin Building ADM

*Job Title (Jobcode): Stu-Activity Asst SEQ 060502

Standard Hours: 29.00

FTE: 0.010000

Full/Part Time: Part-Time

These fields are not updatable

STEP 9

Once the new information is entered and you are comfortable that the information is correct, click the ‘Next’ button at the top right hand corner of the panel.

- If the ‘Changing Salary Information’ was selected, the ‘Compensation Detail’ panel will appear
    - If you have changed the GRADE in the Job title, you must also have an accompanying pay rate change

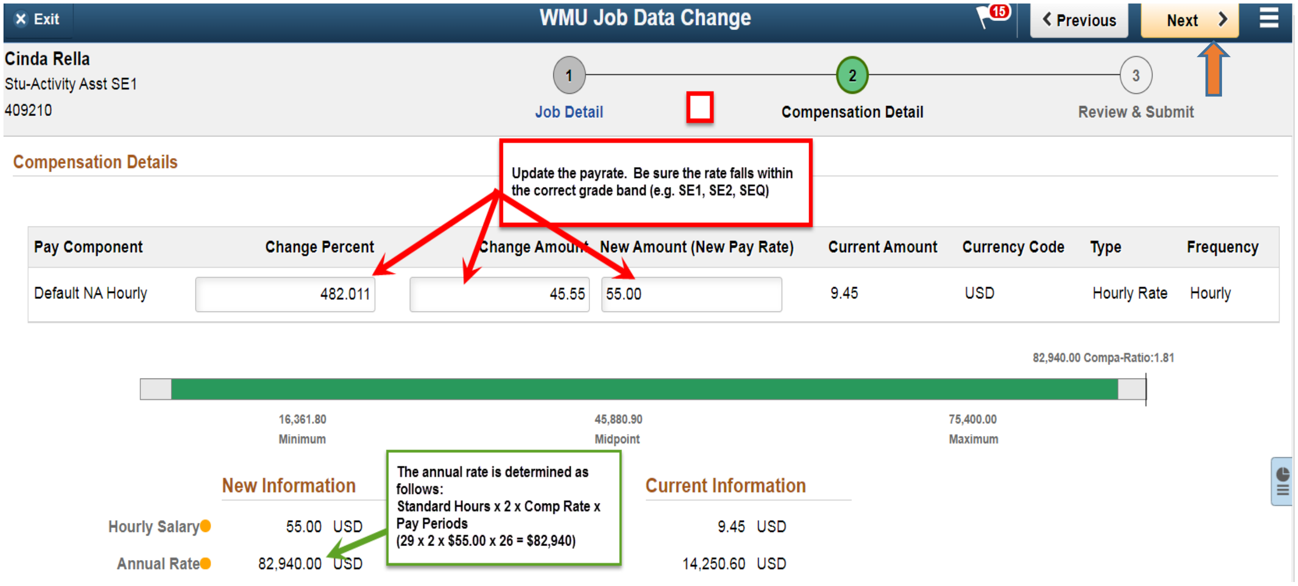
- If there is no salary change, then the ‘Review & Submit’ page will appear

STEP 10

EXAMPLE: DEPARTMENT and JOB TITLE CHANGE (**WITH A PAY CHANGE**)

Enter the new pay rate (NOTE: the effective Date for the pay rate change MUST be the same as the effective date of the other changes). There are three options on how to make the change

- Enter a change percent – if you want to increase the person's pay rate, for example, by 2%, then enter 2.0 in the 'Change Percent' box.
- Enter a Change amount figure – if you want to increase a person's pay by $0.25 per hour, enter .25 in the 'Change Amount' box
- Enter the new pay Rate – if you have a specific pay rate, enter the new rate in the 'New Amount (New Pay Rate)' box.
- After Entering the new data, click the 'Next' button in the top right corner



Cinda Rella
Stu-Activity Asst SE1
409210

Compensation Details

Update the payrate. Be sure the rate falls within the correct grade band (e.g. SE1, SE2, SEQ)

Pay Component	Change Percent	Change Amount	New Amount (New Pay Rate)	Current Amount	Currency Code	Type	Frequency
Default NA Hourly	482.011	45.55	55.00	9.45	USD	Hourly Rate	Hourly

New Information
Hourly Salary 55.00 USD
Annual Rate 82,940.00 USD

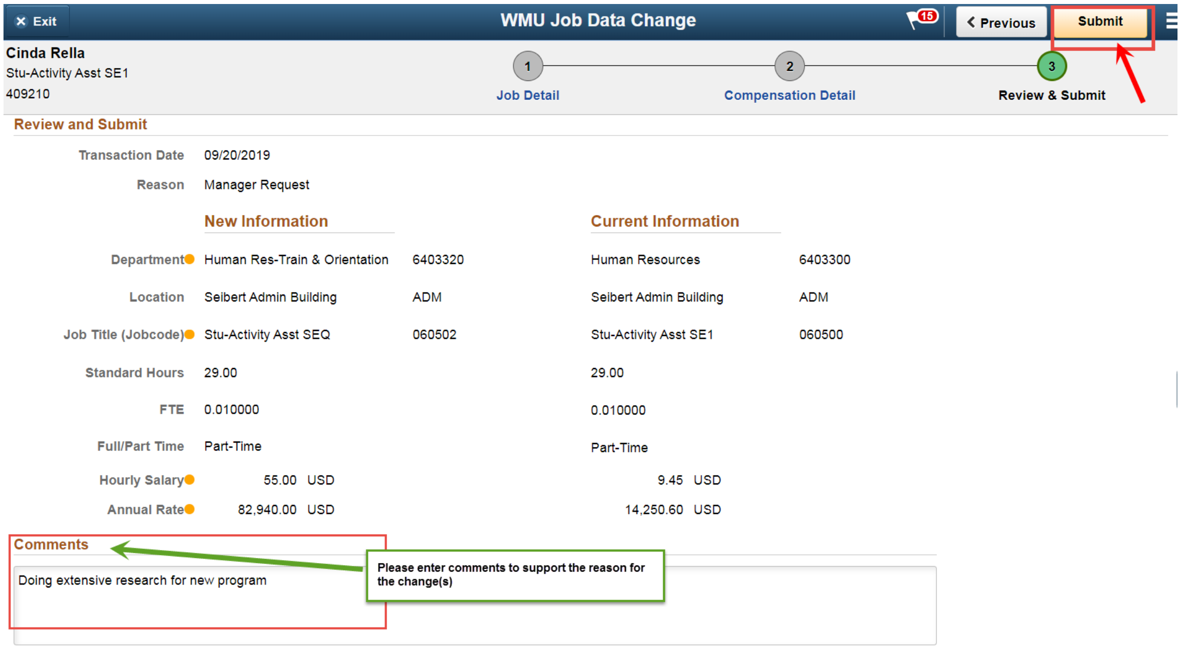
The annual rate is determined as follows:
Standard Hours x 2 x Comp Rate x Pay Periods
(29 x 2 x $55.00 x 26 = $82,940)

Current Information
9.45 USD
14,250.60 USD

STEP 11

REVIEW the data & Submit

- Be sure to make use of the COMMENTS area. Comments are needed for documentation on why the department is making the change(s)
- Click the 'Submit' button



Cinda Rella
Stu-Activity Asst SE1
409210

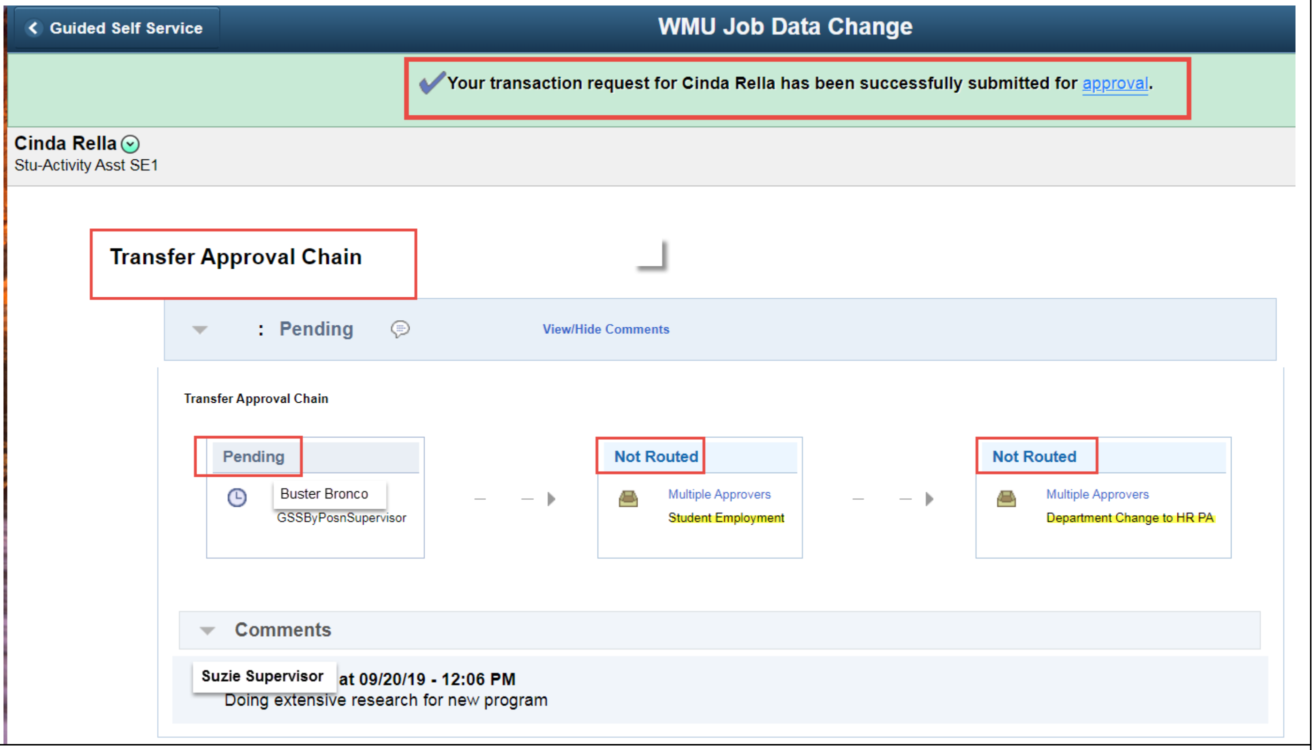
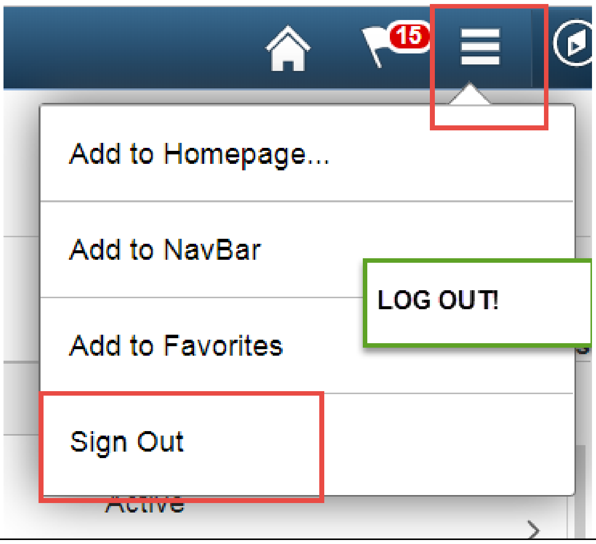
Review and Submit

Transaction Date 09/20/2019
Reason Manager Request

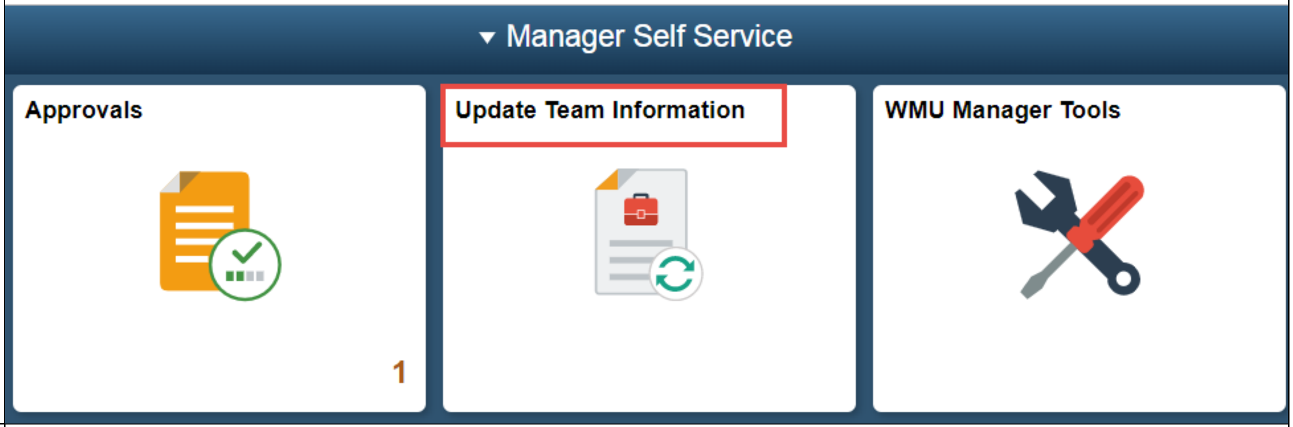
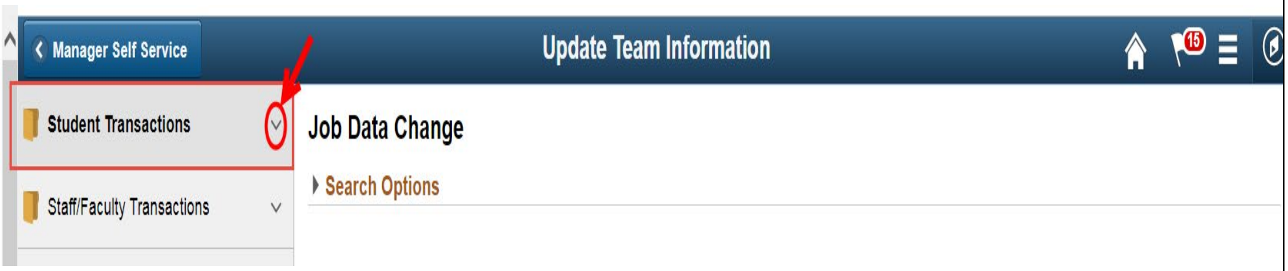
	New Information		Current Information	
Department	Human Res-Train & Orientation	6403320	Human Resources	6403300
Location	Seibert Admin Building	ADM	Seibert Admin Building	ADM
Job Title (Jobcode)	Stu-Activity Asst SEQ	060502	Stu-Activity Asst SE1	060500
Standard Hours	29.00		29.00	
FTE	0.010000		0.010000	
Full/Part Time	Part-Time		Part-Time	
Hourly Salary	55.00 USD		9.45 USD	
Annual Rate	82,940.00 USD		14,250.60 USD	

Comments
Doing extensive research for new program

Please enter comments to support the reason for the change(s)

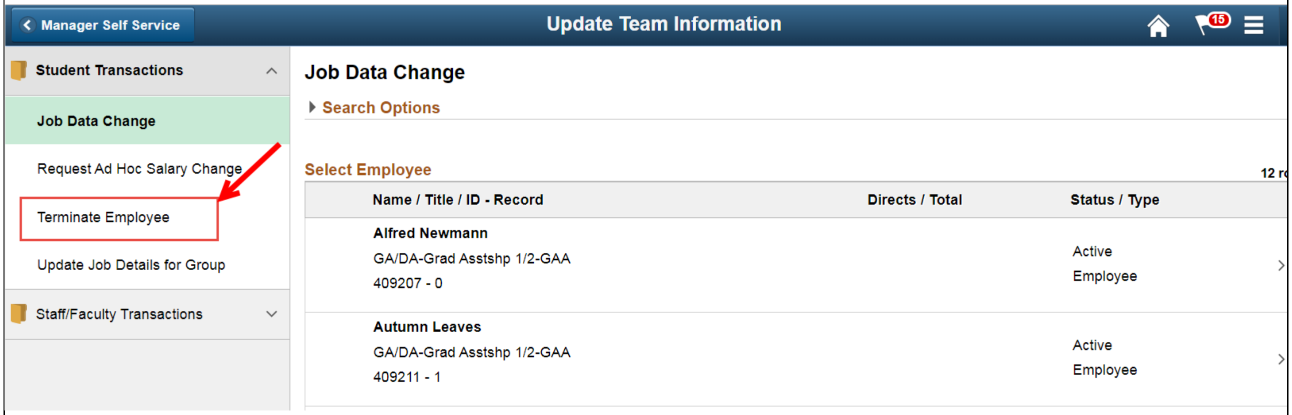
STEP 12	The submission page will appear letting you know that the submission was successful, and the form is being routed. This page will also show you the approval routing chain  Your transaction request for Cinda Rella has been successfully submitted for approval. **Cinda Rella** Stu-Activity Asst SE1 **Transfer Approval Chain** : Pending Transfer Approval Chain Pending – Buster Bronco – GSSByPosnSupervisor Not Routed – Multiple Approvers – Student Employment Not Routed – Multiple Approvers – Department Change to HR PA Comments Suzie Supervisor at 09/20/19 - 12:06 PM Doing extensive research for new program
STEP 13	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click 'Sign Out' 

Manager Self Service (MSS) – Submitting TERMINATIONS

Process Overview – **TERMINATION**	**PeopleSoft Manager Self Service allows departments to submit termination transactions for its employees online.**
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the 'Update Team Information' tile 
STEP 2	The 'Update Team Information Panel will appear. At the left side of the panel, select the 'Student Transactions' option & click on the down arrow to get the transaction options available 

STEP 3

Once the Transaction options appear, click on ‘Terminate Employee’



Job Data Change

Search Options

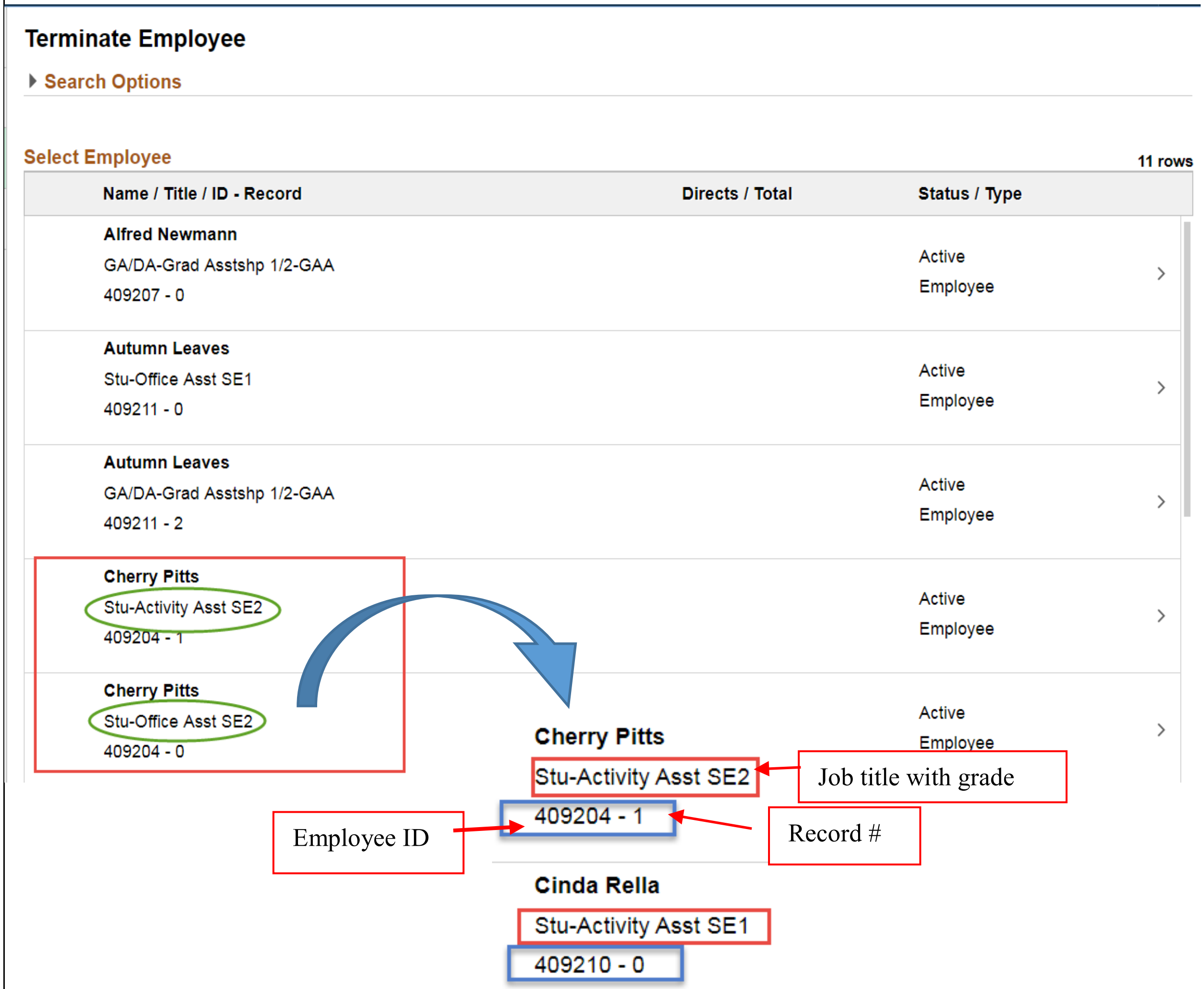
Select Employee 12 r

Name / Title / ID - Record	Directs / Total	Status / Type
Alfred Newmann GA/DA-Grad Asstshp 1/2-GAA 409207 - 0		Active Employee
Autumn Leaves GA/DA-Grad Asstshp 1/2-GAA 409211 - 1		Active Employee

STEP 4

Be sure to choose the correct employee AND the correct job (some employees have multiple appointments in the same department).

- Click anywhere on the employee line

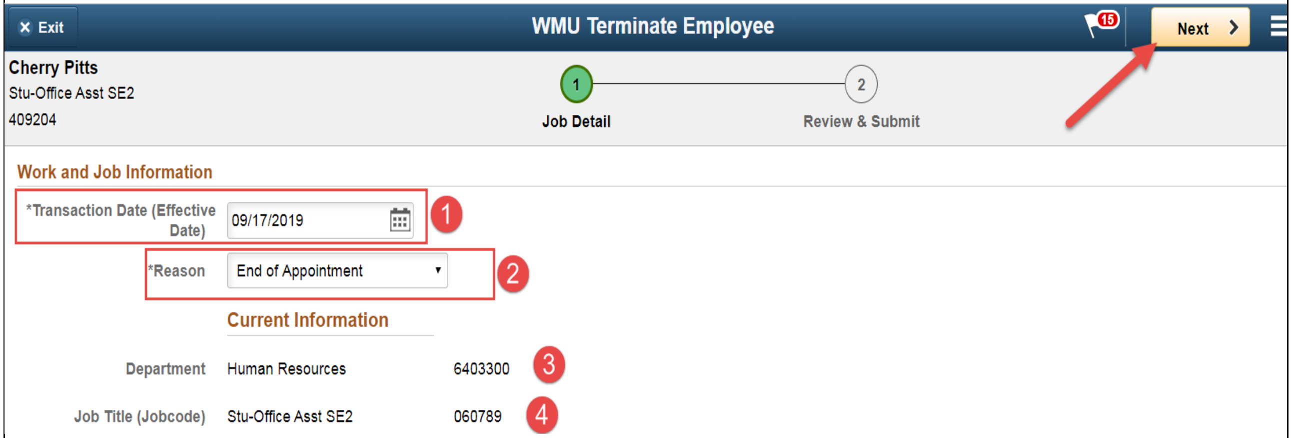


Terminate Employee

Search Options

Select Employee 11 rows

Name / Title / ID - Record	Directs / Total	Status / Type
Alfred Newmann GA/DA-Grad Asstshp 1/2-GAA 409207 - 0		Active Employee
Autumn Leaves Stu-Office Asst SE1 409211 - 0		Active Employee
Autumn Leaves GA/DA-Grad Asstshp 1/2-GAA 409211 - 2		Active Employee
Cherry Pitts Stu-Activity Asst SE2 409204 - 1		Active Employee
Cherry Pitts Stu-Office Asst SE2 409204 - 0		Active Employee

STEP 5	After selecting the employee, the terminate employee detail page will appear for the termination transaction. PLEASE NOTE: - To cancel the transaction, the manager can select the exit button in the top left corner to exit the transaction and return to the Team page.
STEP 6	Enter the termination (transaction) effective date ❶ ○ This date should be the FIRST DAY OF TERMINATION ○ If the employees last day worked/paid is 3/1/xx, then the TRANSACTION/EFFECTIVE DATE to be entered is 3/2/xx Enter the termination reason ❷ ○ Click on the 'down' arrow and select the pay change reason ○ For STUDENTS, ONLY use action ' End of Appointment', 'Resignation' or Released (e.g. fired). Please note that 'End of Appointment' will AUTOPOPULATE the reason field. ○ Verify you are selecting the correct job to terminate by checking the Department ❸ (e.g. cost center) and the Job title ❹ Once you are comfortable that the information is correct, click the 'Next' button at the top right corner of the panel. This will take you to the 'Review and Submit' page.  Cherry Pitts Stu-Office Asst SE2 409204 Work and Job Information *Transaction Date (Effective Date) 09/17/2019 ① *Reason End of Appointment ② Current Information Department Human Resources 6403300 ③ Job Title (Jobcode) Stu-Office Asst SE2 060789 ④

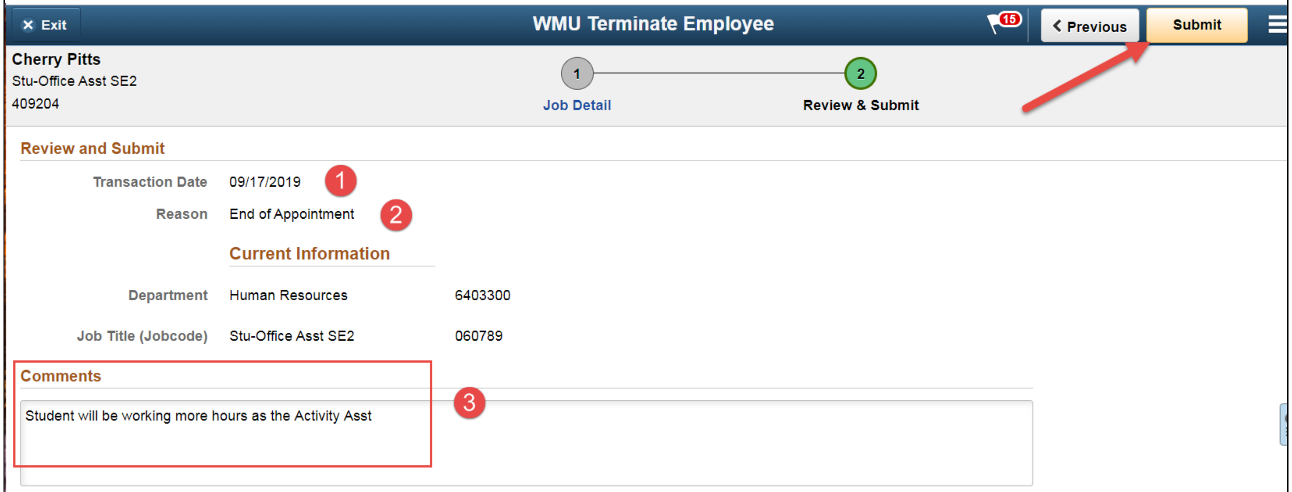
STEP 7

Review Data & Submit Form

- Verify the effective date ❶
- Verify the termination reason ❷
- Add Comments for documentation & clarification ❸

If everything looks good, click the ‘Submit’ button at the top right corner

- If you need to change data, click the ‘Exit’ button at the top left corner to take you back to the Update page



Cherry Pitts
Stu-Office Asst SE2
409204

Review and Submit

Transaction Date 09/17/2019
Reason End of Appointment

Current Information

Department	Human Resources	6403300
Job Title (Jobcode)	Stu-Office Asst SE2	060789

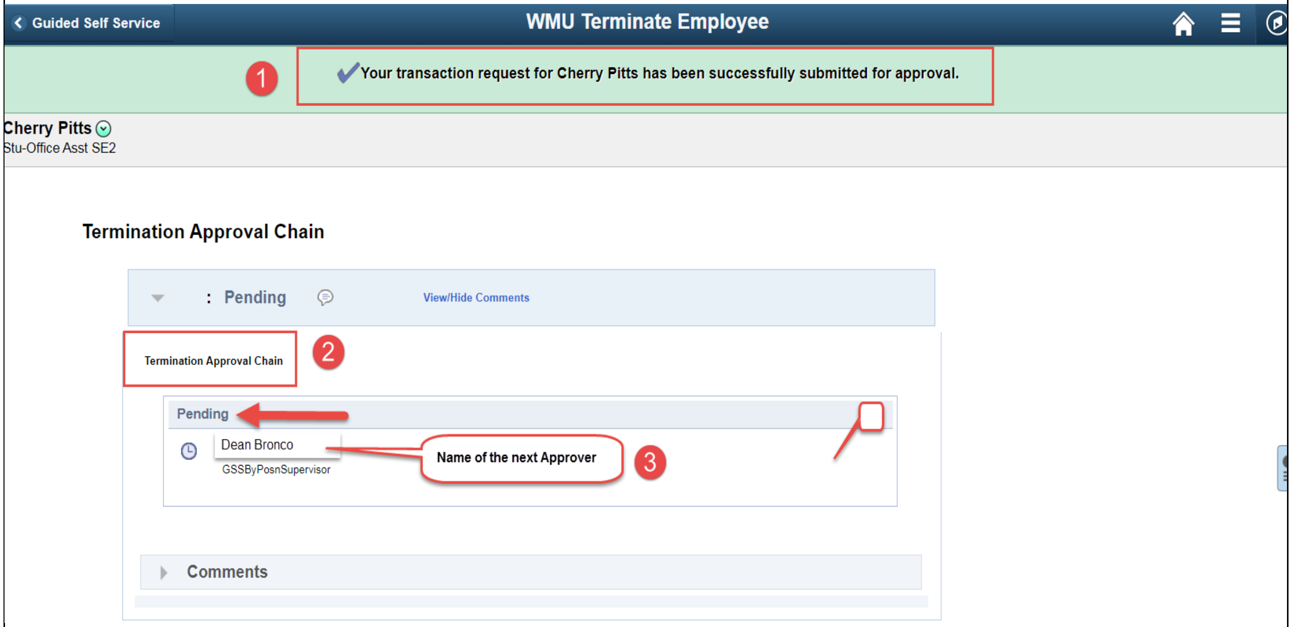
Comments

Student will be working more hours as the Activity Asst

STEP 8

Success Message should appear

- If the Transaction was successfully submitted, you should see a message appear on the submission page ❶
- You will also see the next person in the form approval chain ❷ & ❸



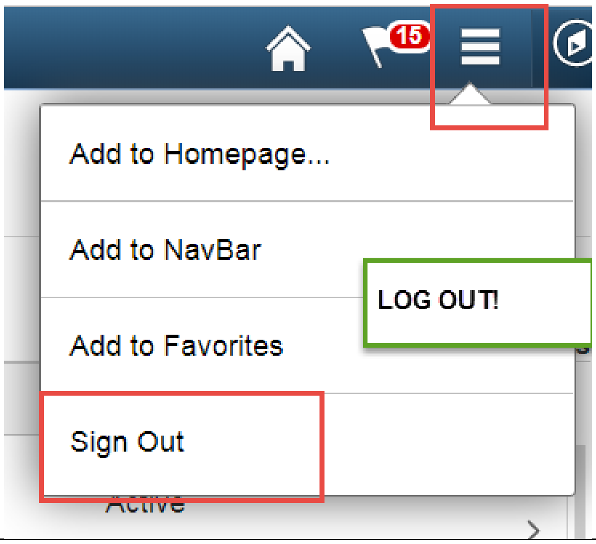
✔Your transaction request for Cherry Pitts has been successfully submitted for approval.

Cherry Pitts
Stu-Office Asst SE2

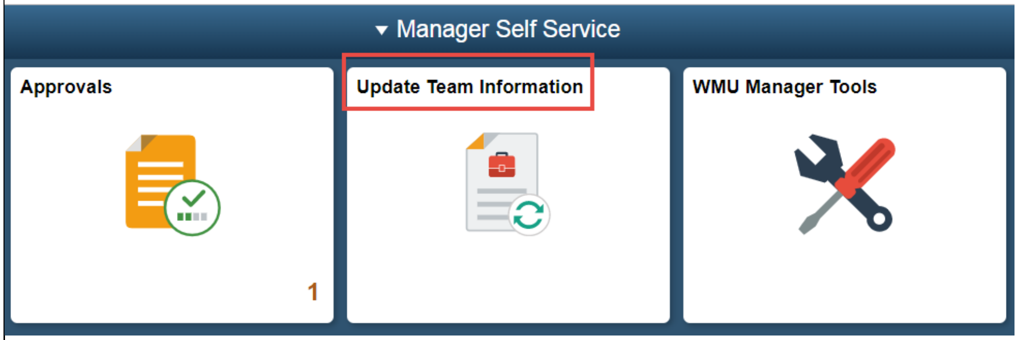
Termination Approval Chain

Termination Approval Chain

Pending
Dean Bronco
GSSByPosnSupervisor

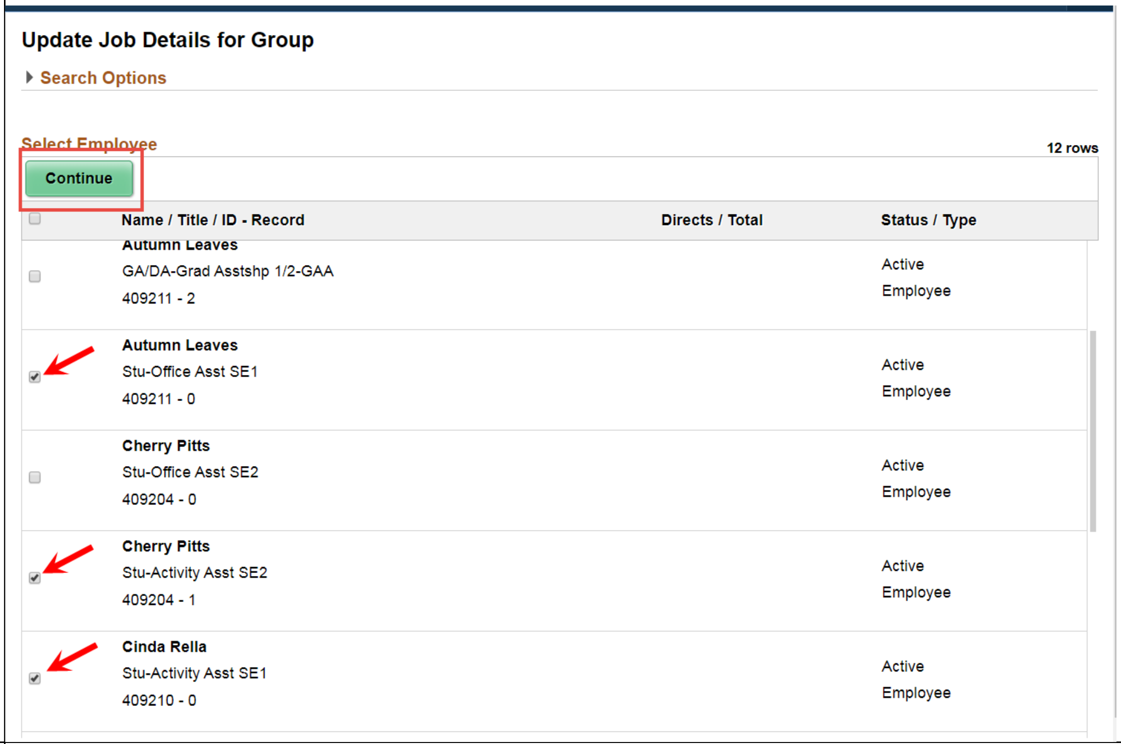
STEP 9	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click ‘Sign Out’ 

Manager Self Service (MSS) – Group Update

Process Overview – GROUP UPDATE	PeopleSoft Manager Self Service allows for group processing of the SAME transactional data. For group update to be used, the following are required: • Same Effective Date • Same Action (e.g. Dept change, termination) • Information is being changed to the SAME data (e.g. all funding sources being changed to 6400000) The following options are available for group update • Dept (Cost Center) change • Location (Building) change • Termination
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the 'Update Team Information' Tile 
STEP 2	Click on the 'Update Job Details for Group' option 

STEP 3

Select the employee for whom you want to make a change by clicking on the checkbox at the left side, then click the ‘Continue’ button



Update Job Details for Group

▸ Search Options

Select Employee

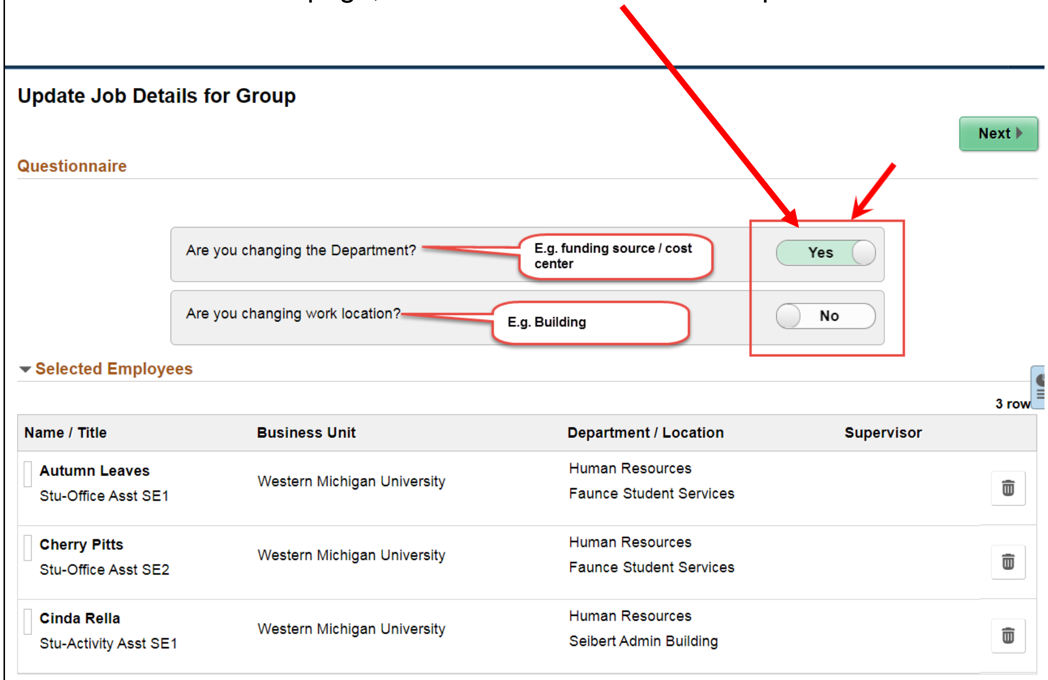
12 rows

Continue

☐	Name / Title / ID - Record	Directs / Total	Status / Type
☐	**Autumn Leaves** GA/DA-Grad Asstshp 1/2-GAA 409211 - 2		Active Employee
☑	**Autumn Leaves** Stu-Office Asst SE1 409211 - 0		Active Employee
☐	**Cherry Pitts** Stu-Office Asst SE2 409204 - 0		Active Employee
☑	**Cherry Pitts** Stu-Activity Asst SE2 409204 - 1		Active Employee
☑	**Cinda Rella** Stu-Activity Asst SE1 409210 - 0		Active Employee

STEP 4

At the ‘Questionnaire’ page, select ‘Yes’ or ‘No’ for each question



Update Job Details for Group

Next ▸

Questionnaire

Are you changing the Department? — E.g. funding source / cost center — Yes

Are you changing work location? — E.g. Building — No

▾ Selected Employees

3 row

Name / Title	Business Unit	Department / Location	Supervisor
Autumn Leaves Stu-Office Asst SE1	Western Michigan University	Human Resources Faunce Student Services	
Cherry Pitts Stu-Office Asst SE2	Western Michigan University	Human Resources Faunce Student Services	
Cinda Rella Stu-Activity Asst SE1	Western Michigan University	Human Resources Seibert Admin Building	

STEP 5

At the Group Update panel, enter
1. The Effective Date of the transaction AND
2. The new information
3. Click 'Next'

Group Update
3 Employees
MULTISELECT

Work and Job Information

*Transaction Date (Effective Date) 09/16/2019

Enter the new information

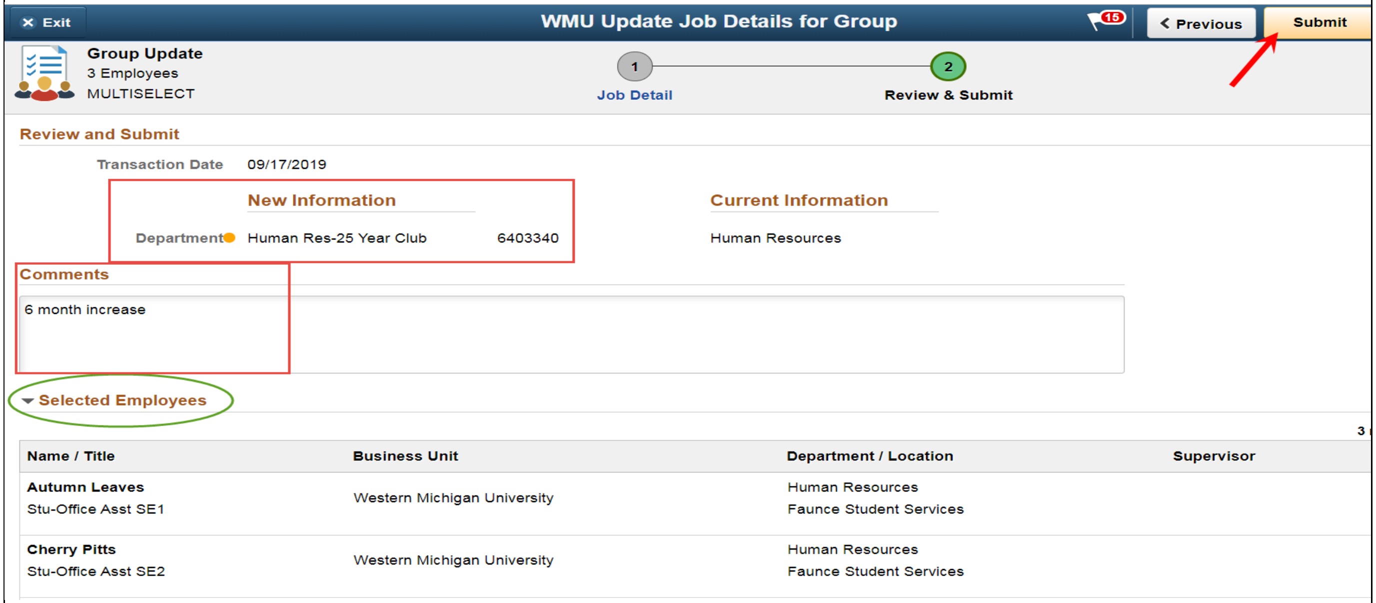
	New Information		Current Information
*Department	Human Res-Staff Svc Excelle	6403380	Human Resources

Selected Employees

● Changes Made
* Required Field

STEP 6

Review Information and add COMMENTS
- Click SUBMIT when done



Group Update
3 Employees
MULTISELECT

Review and Submit

Transaction Date 09/17/2019

	New Information		Current Information
Department	Human Res-25 Year Club	6403340	Human Resources

Comments

6 month increase

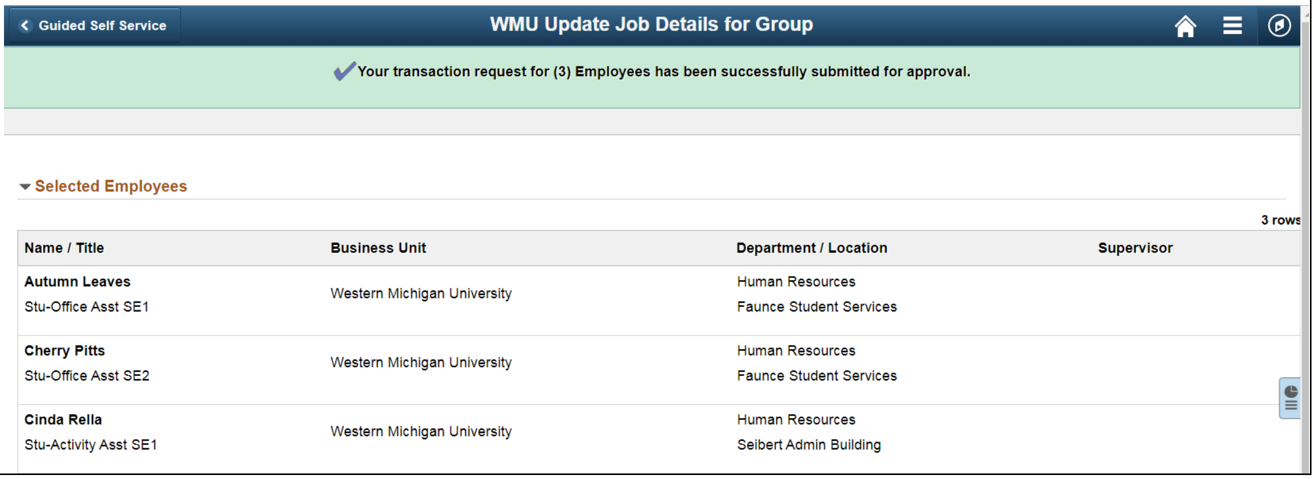
Selected Employees

3

Name / Title	Business Unit	Department / Location	Supervisor
Autumn Leaves Stu-Office Asst SE1	Western Michigan University	Human Resources Faunce Student Services	
Cherry Pitts Stu-Office Asst SE2	Western Michigan University	Human Resources Faunce Student Services	

STEP 7

You should see the 'Successfully Submitted' message appear, which means the transaction is complete



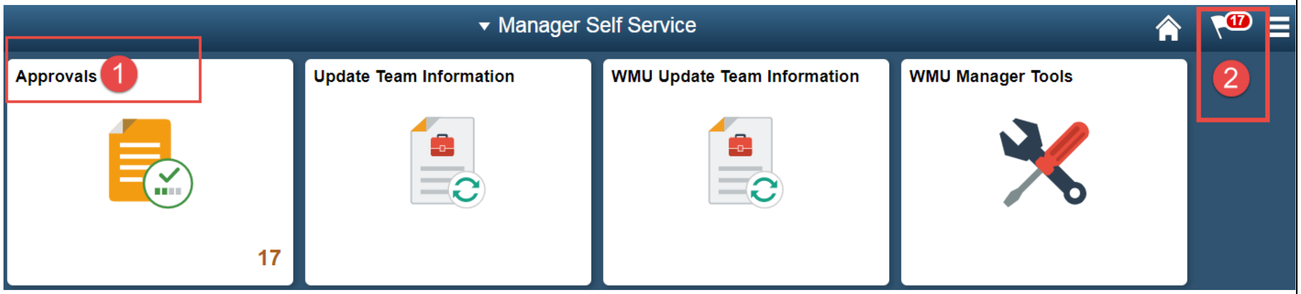
✓Your transaction request for (3) Employees has been successfully submitted for approval.

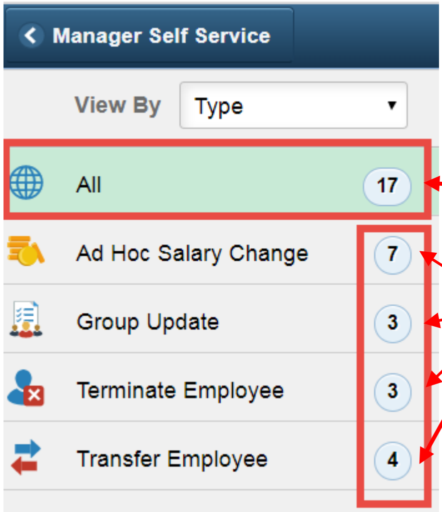
Selected Employees

3 rows

Name / Title	Business Unit	Department / Location	Supervisor
Autumn Leaves Stu-Office Asst SE1	Western Michigan University	Human Resources Faunce Student Services	
Cherry Pitts Stu-Office Asst SE2	Western Michigan University	Human Resources Faunce Student Services	
Cinda Rella Stu-Activity Asst SE1	Western Michigan University	Human Resources Seibert Admin Building	

Manager Self Service (MSS) – APPROVING Transactions

Process Overview – APPROVING A TRANSACTION	All submitted transactions are routed to the Initiator's supervisor (or supervisor's designee) for approval.
NOTIFICATION	When a transaction routes to an approver, the system automatically generates an email alerting the approver to a pending transaction. The approver needs to access Manager Self Service to take action on the request
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, there will be two options for approving forms  ❶ Using the Approvals tile ❷ Using the Push Notification Flag
USING OPTION 1 – APPROVALS Tile	Clicking on the 'Approvals' tile will bring you to the 'Pending Approvals' page Approvers have the option of seeing ALL forms waiting for approval, or the approver can select a specific action (e.g. Ad Hoc Salary Change)



All	17
Ad Hoc Salary Change	7
Group Update	3
Terminate Employee	3
Transfer Employee	4

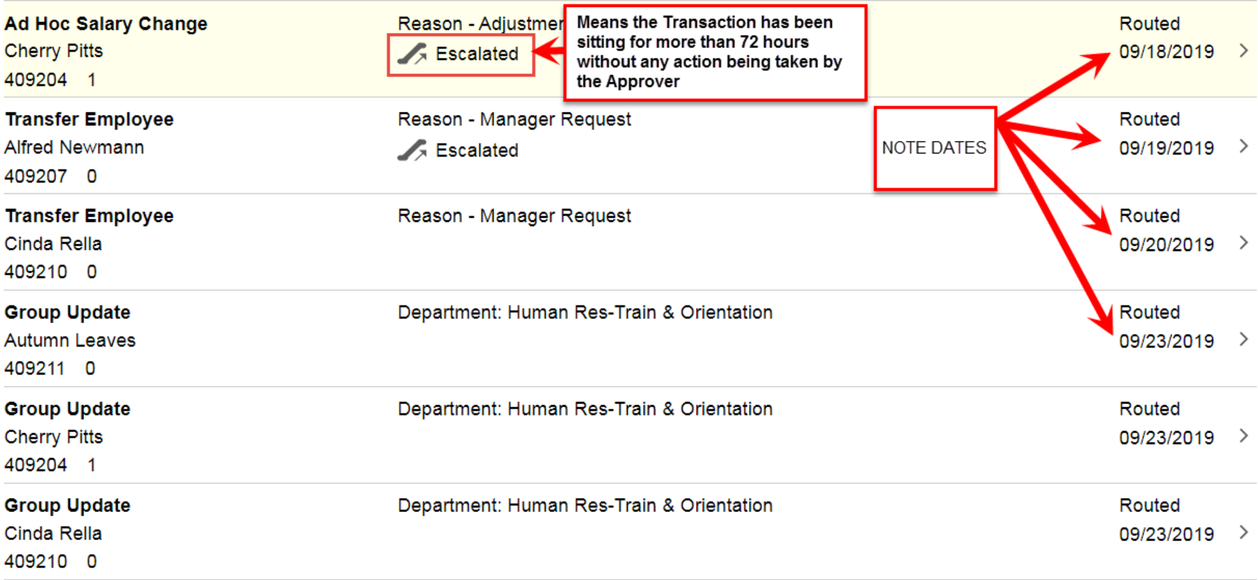
TOTAL Number of transactions waiting for review

Can select a single transaction to review

OPTION 1 - STEP 2

Once the Transaction option has been selected for review, a list of names will appear

- The list appears with the ‘oldest’ form at the top of the list and the most recent submission at the bottom of the list



Ad Hoc Salary Change Cherry Pitts 409204 1	Reason - Adjustmen Escalated	Routed 09/18/2019
Transfer Employee Alfred Newmann 409207 0	Reason - Manager Request Escalated	Routed 09/19/2019
Transfer Employee Cinda Rella 409210 0	Reason - Manager Request	Routed 09/20/2019
Group Update Autumn Leaves 409211 0	Department: Human Res-Train & Orientation	Routed 09/23/2019
Group Update Cherry Pitts 409204 1	Department: Human Res-Train & Orientation	Routed 09/23/2019
Group Update Cinda Rella 409210 0	Department: Human Res-Train & Orientation	Routed 09/23/2019

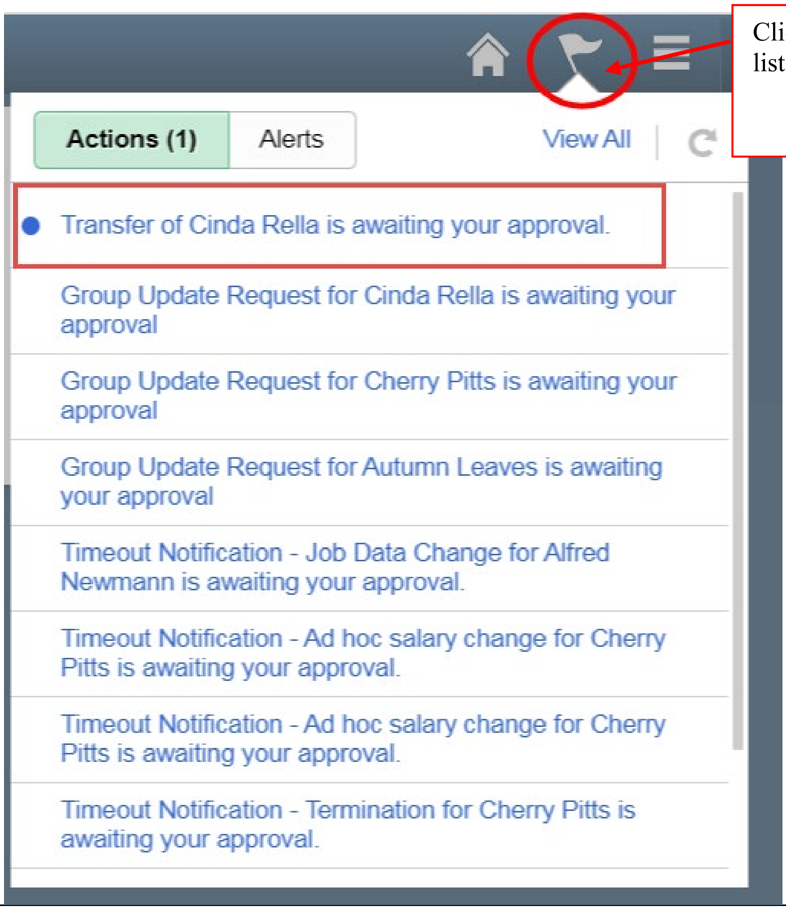
Means the Transaction has been sitting for more than 72 hours without any action being taken by the Approver

NOTE DATES

- Select the employee/transaction to a approve by clicking anywhere on the line

USING OPTION 2 – The PUSH NOTIFICATION Flag

Clicking on the Push Notifications Flag will bring up a listing of transactions pending approval



Transfer of Cinda Rella is awaiting your approval.

Group Update Request for Cinda Rella is awaiting your approval

Group Update Request for Cherry Pitts is awaiting your approval

Group Update Request for Autumn Leaves is awaiting your approval

Timeout Notification - Job Data Change for Alfred Newmann is awaiting your approval.

Timeout Notification - Ad hoc salary change for Cherry Pitts is awaiting your approval.

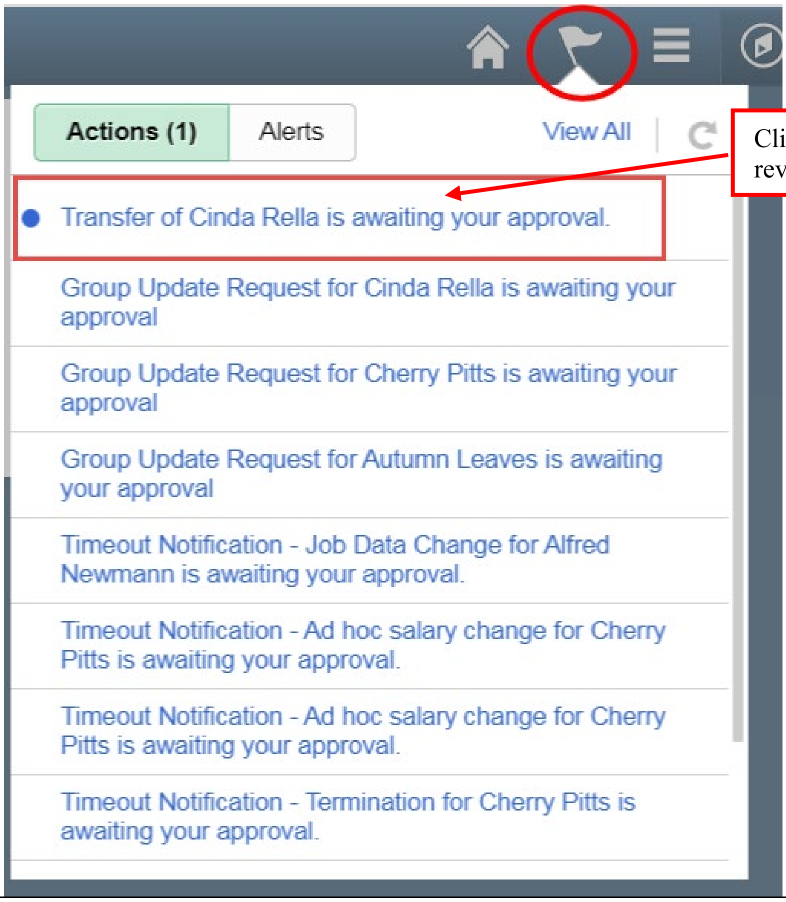
Timeout Notification - Ad hoc salary change for Cherry Pitts is awaiting your approval.

Timeout Notification - Termination for Cherry Pitts is awaiting your approval.

Click on the Push Notifications Flag to get the list of transactions available for review

OPTION 2 – Step 2

Once the list appears, select the transaction you wish to review by clicking on the link

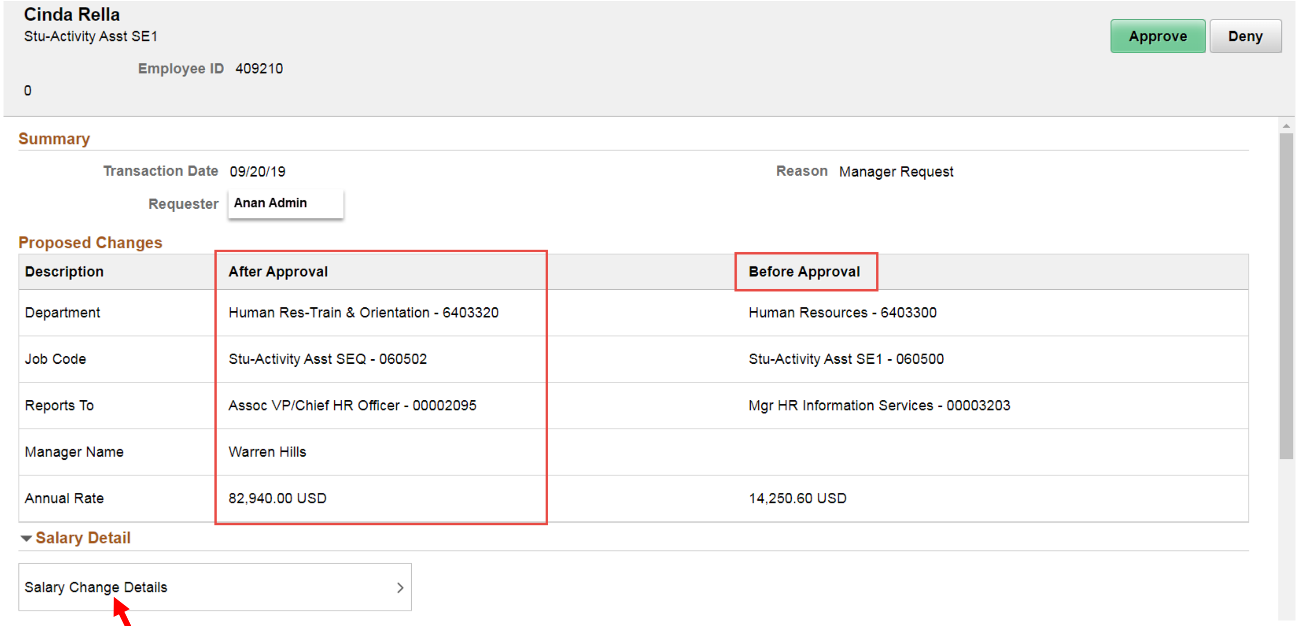


- Transfer of Cinda Rella is awaiting your approval.
- Group Update Request for Cinda Rella is awaiting your approval
- Group Update Request for Cherry Pitts is awaiting your approval
- Group Update Request for Autumn Leaves is awaiting your approval
- Timeout Notification - Job Data Change for Alfred Newmann is awaiting your approval.
- Timeout Notification - Ad hoc salary change for Cherry Pitts is awaiting your approval.
- Timeout Notification - Ad hoc salary change for Cherry Pitts is awaiting your approval.
- Timeout Notification - Termination for Cherry Pitts is awaiting your approval.

Click the link to bring up the Summary page for review

ALL OPTIONS - STEP 3

Once the employee/transaction has been selected, the Approval Summary page will appear for review



Cinda Rella
Stu-Activity Asst SE1
Employee ID 409210
0

Summary

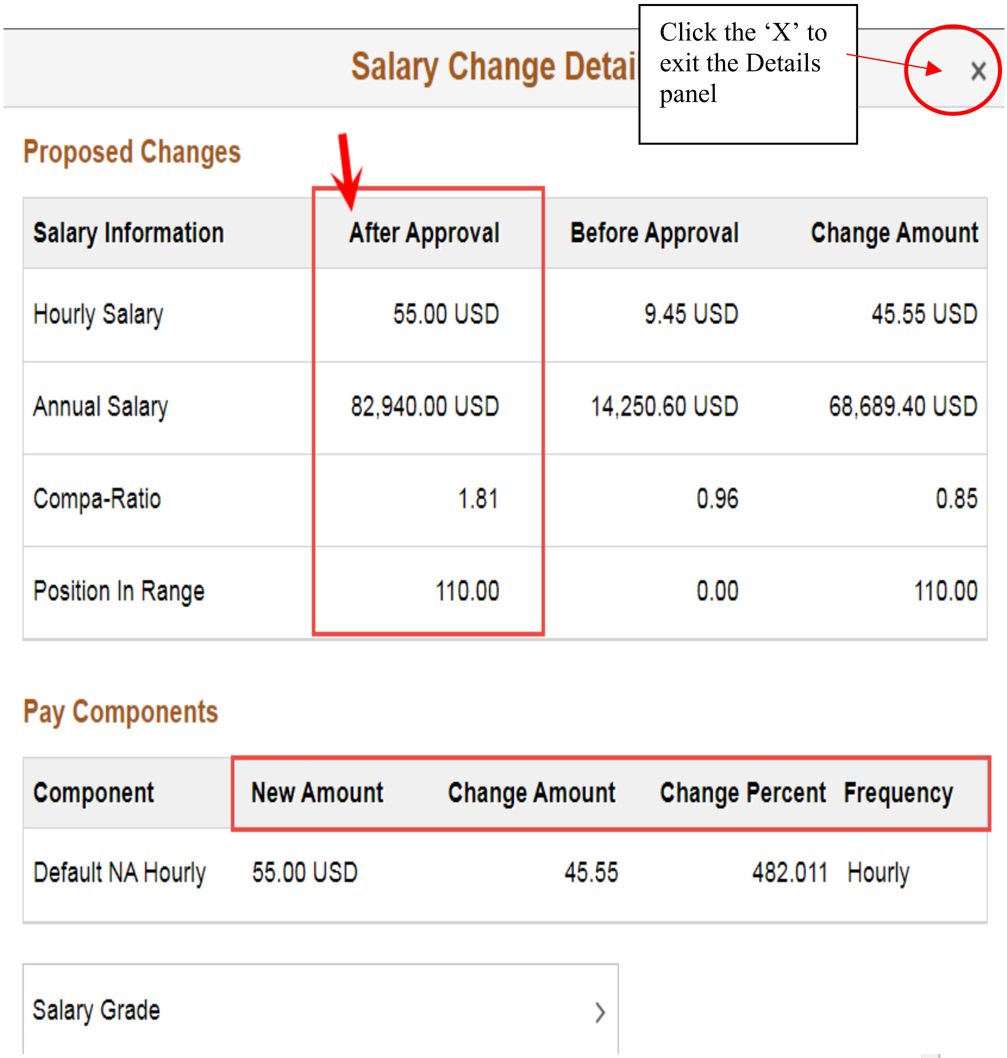
Transaction Date 09/20/19
Reason Manager Request
Requester Anan Admin

Proposed Changes

Description	After Approval	Before Approval
Department	Human Res-Train & Orientation - 6403320	Human Resources - 6403300
Job Code	Stu-Activity Asst SEQ - 060502	Stu-Activity Asst SE1 - 060500
Reports To	Assoc VP/Chief HR Officer - 00002095	Mgr HR Information Services - 00003203
Manager Name	Warren Hills	
Annual Rate	82,940.00 USD	14,250.60 USD

Salary Detail

Clicking on Salary Change Details will bring up a 'Details' panel



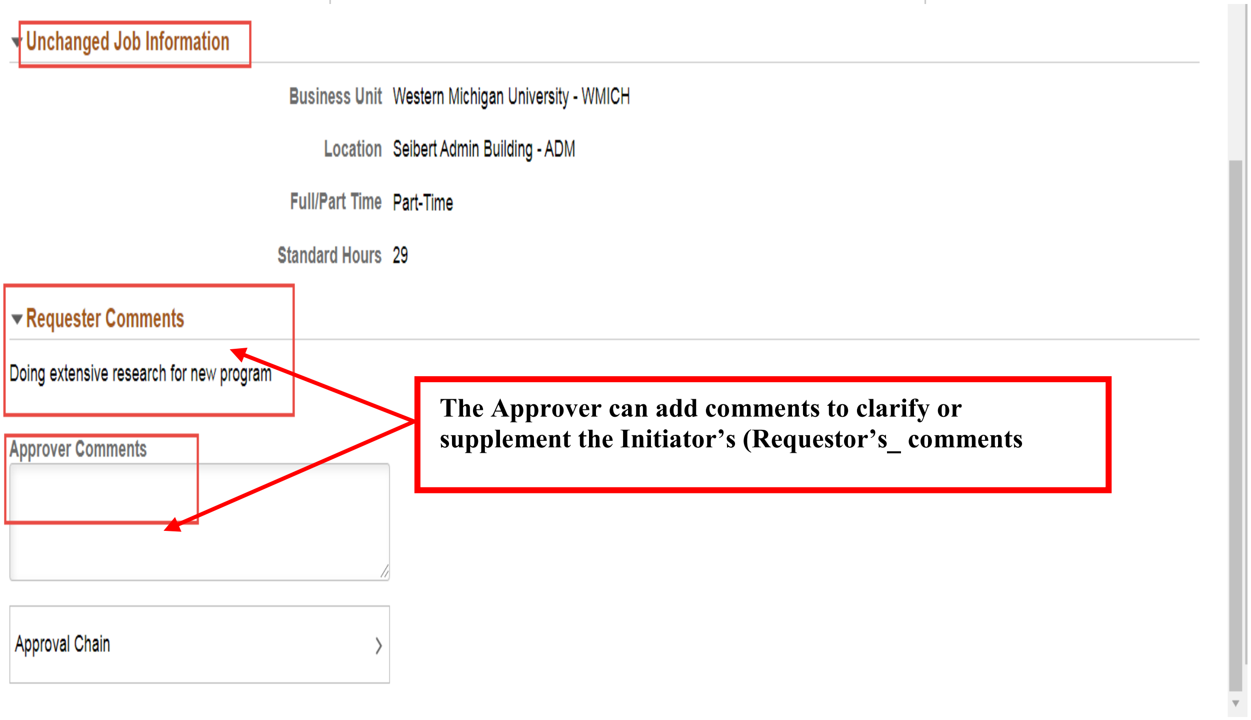
Click the ‘X’ to exit the Details panel

Proposed Changes

Salary Information	After Approval	Before Approval	Change Amount
Hourly Salary	55.00 USD	9.45 USD	45.55 USD
Annual Salary	82,940.00 USD	14,250.60 USD	68,689.40 USD
Compa-Ratio	1.81	0.96	0.85
Position In Range	110.00	0.00	110.00

Pay Components

Component	New Amount	Change Amount	Change Percent	Frequency
Default NA Hourly	55.00 USD	45.55	482.011	Hourly



Unchanged Job Information

Business Unit Western Michigan University - WMICH

Location Seibert Admin Building - ADM

Full/Part Time Part-Time

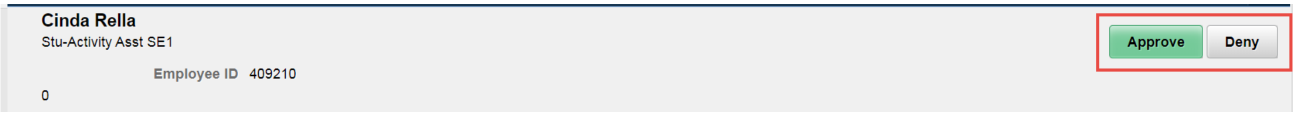
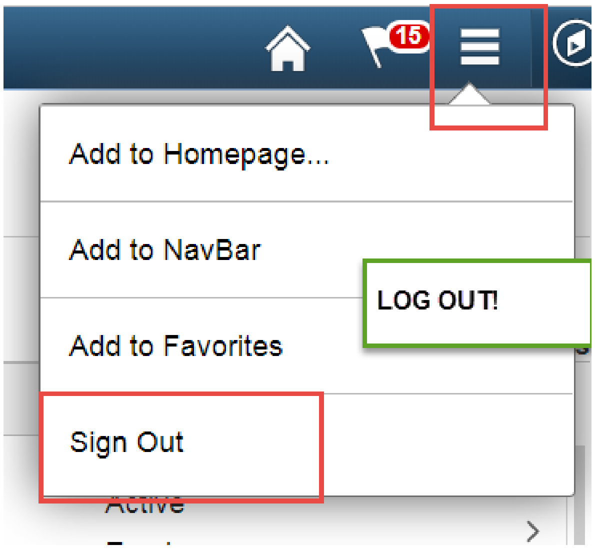
Standard Hours 29

Requester Comments

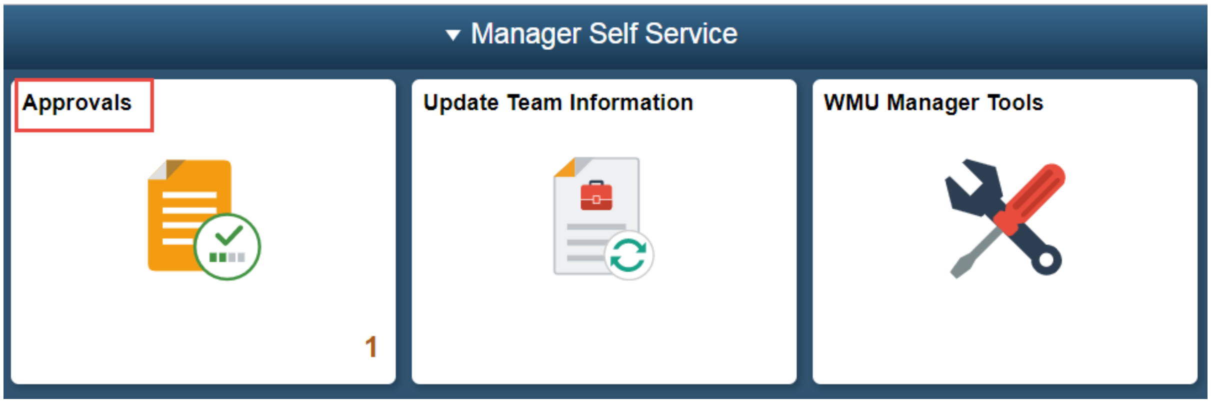
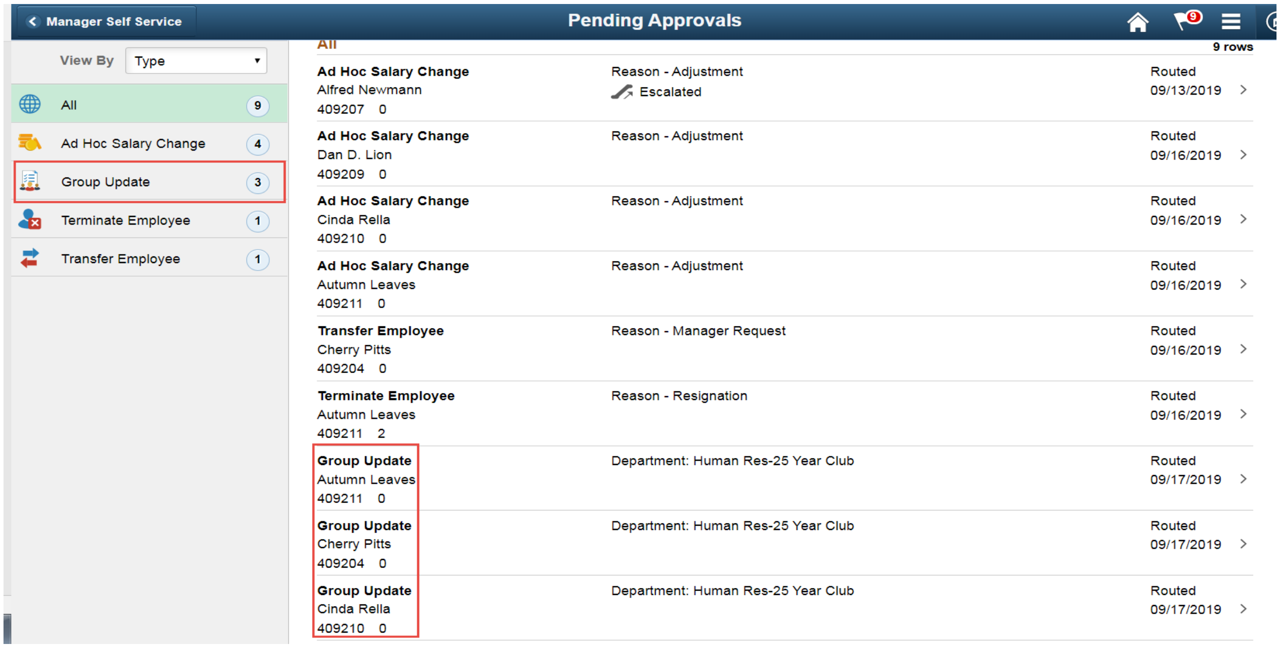
Doing extensive research for new program

Approver Comments

The Approver can add comments to clarify or supplement the Initiator’s (Requestor’s_ comments

STEP 4	After reviewing the form, click the ‘Approve’ or ‘Deny’ button in the top right corner • Approving the transaction sends the form to the next approval stop and/or HR • Denying a transaction cancels the form & no further action can be taken. The initiator will need to submit a new transaction if corrections are needed  **Cinda Rella** Stu-Activity Asst SE1 Employee ID 409210 0
STEP 5	Once the button is clicked, the Success Message should appear (but it disappears quickly) • The ‘Pending Approvals’ panel will appear again • If no more approvals are to be done, log out from PeopleSoft
STEP 6	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click ‘Sign Out’  **LOG OUT!**

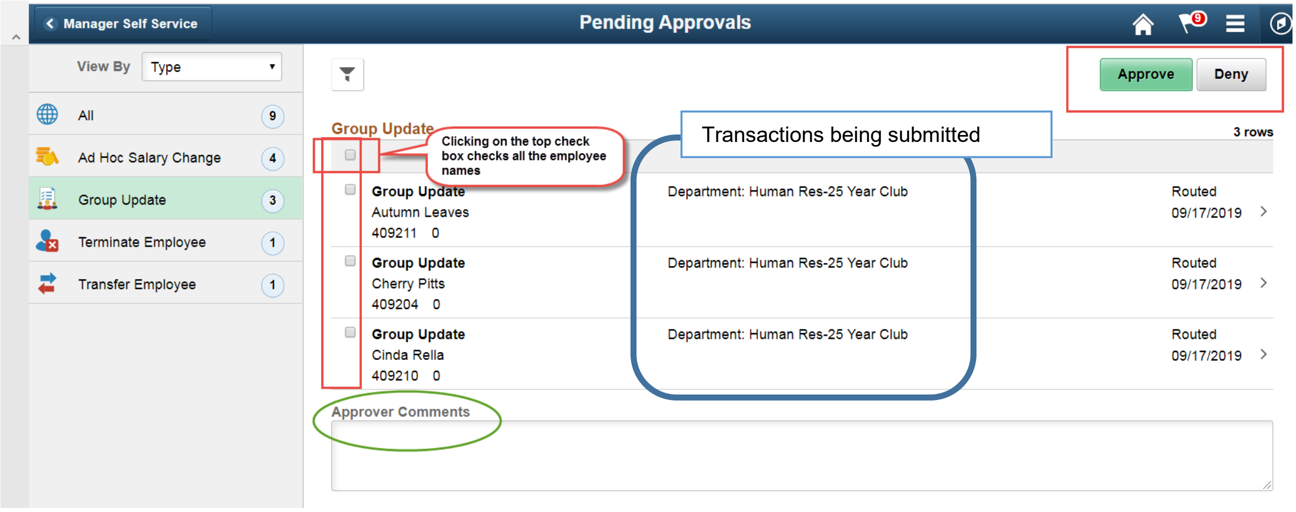
Manager Self Service (MSS) – Group APPROVAL

Process Overview – GROUP APPROVALS	PeopleSoft Manager Self Service allows for group APPROVALS of the SAME transactional data. For group update to be used, the following are required: • Same Effective Date • Same Action (e.g. Pay change, Dept change) • Information is being changed to the SAME data (e.g. all funding sources being changed to 6400000) So, when an Approver receives a group of transactions to approve, these will all have the same effective date, action & data
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the 'Approvals' Tile 
STEP 2	Click on the 'Group Update' option  Manager Self Service Pending Approvals 9 View By Type All 9 Ad Hoc Salary Change 4 Group Update 3 Terminate Employee 1 Transfer Employee 1 All 9 rows **Ad Hoc Salary Change** Alfred Newmann 409207 0 — Reason - Adjustment — Escalated — Routed 09/13/2019 **Ad Hoc Salary Change** Dan D. Lion 409209 0 — Reason - Adjustment — Routed 09/16/2019 **Ad Hoc Salary Change** Cinda Rella 409210 0 — Reason - Adjustment — Routed 09/16/2019 **Ad Hoc Salary Change** Autumn Leaves 409211 0 — Reason - Adjustment — Routed 09/16/2019 **Transfer Employee** Cherry Pitts 409204 0 — Reason - Manager Request — Routed 09/16/2019 **Terminate Employee** Autumn Leaves 409211 2 — Reason - Resignation — Routed 09/16/2019 **Group Update** Autumn Leaves 409211 0 — Department: Human Res-25 Year Club — Routed 09/17/2019 **Group Update** Cherry Pitts 409204 0 — Department: Human Res-25 Year Club — Routed 09/17/2019 **Group Update** Cinda Rella 409210 0 — Department: Human Res-25 Year Club — Routed 09/17/2019

STEP 3

Select the employee(s) to approve by clicking on the checkbox at the left side, then click the 'Approve' or 'Deny' button

- If you want to approve all employees at once, click the top checkbox at the left ~ it will select all of the employees lists
- Approvers can pick & choose those to approve/deny (not all have to have action taken). If there is a question, the transaction should NOT be approved
- NOTE the COMMENTS section below the names to be approved
- The middle section indicates the change that is being made



Clicking on the top check box checks all the employee names

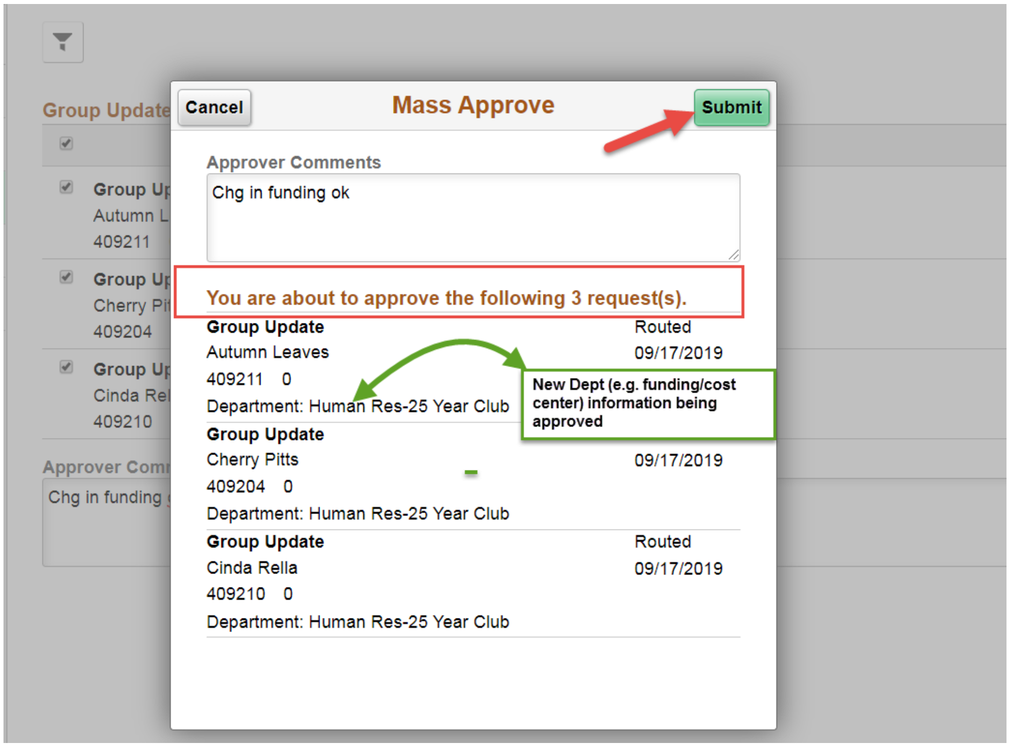
Transactions being submitted

☐			
☐	Group Update Autumn Leaves 409211 0	Department: Human Res-25 Year Club	Routed 09/17/2019
☐	Group Update Cherry Pitts 409204 0	Department: Human Res-25 Year Club	Routed 09/17/2019
☐	Group Update Cinda Rella 409210 0	Department: Human Res-25 Year Club	Routed 09/17/2019

STEP 4

A "Mass Approve" box will appear for one more review

- Click 'Submit' if all are OK
- Click 'Cancel' if changes are needed – this will take the approver back to the group panel



Chg in funding ok

You are about to approve the following 3 request(s).

Group Update Autumn Leaves 409211 0 Department: Human Res-25 Year Club	Routed 09/17/2019
Group Update Cherry Pitts 409204 0 Department: Human Res-25 Year Club	09/17/2019
Group Update Cinda Rella 409210 0 Department: Human Res-25 Year Club	Routed 09/17/2019

New Dept (e.g. funding/cost center) information being approved

STEP 5

Once submitted a <u>very quick</u> message will appear indicating successful approval.

- The names/transaction will have disappeared from the Pending Approval list

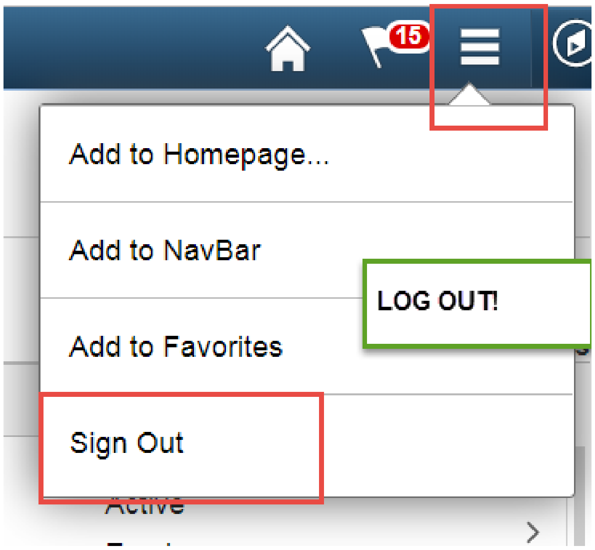
Ad Hoc Salary Change Alfred Newmann 409207 0	Reason - Adjustment Escalated	Routed 09/13/2019
Ad Hoc Salary Change Dan D. Lion 409209 0	Reason - Adjustment	Routed 09/16/2019
Ad Hoc Salary Change Cinda Rella 409210 0	Reason - Adjustment	Routed 09/16/2019
Ad Hoc Salary Change Autumn Leaves 409211 0	Reason - Adjustment	Routed 09/16/2019
Transfer Employee Cherry Pitts 409204 0	Reason - Manager Request	Routed 09/16/2019
Terminate Employee Autumn Leaves 409211 2	Reason - Resignation	Routed 09/16/2019

The 'Group Update' option is now gone

STEP 6

LOG OUT

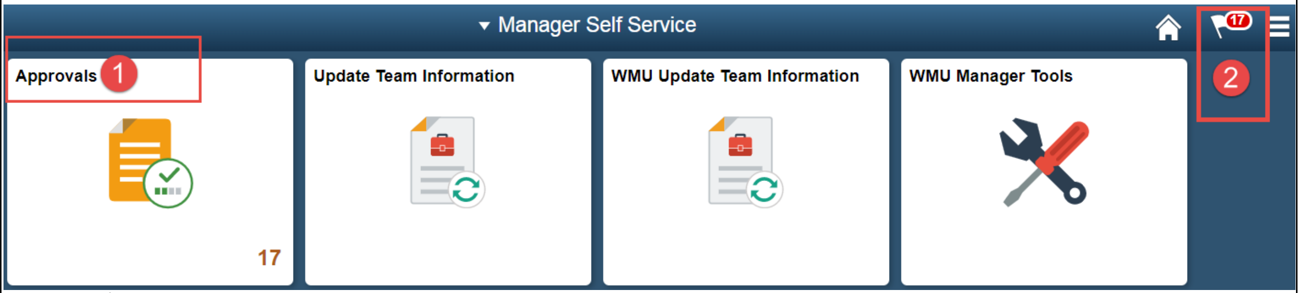
- Click on the 3-Bars in the top right corner
- Once option box appears, click 'Sign Out'



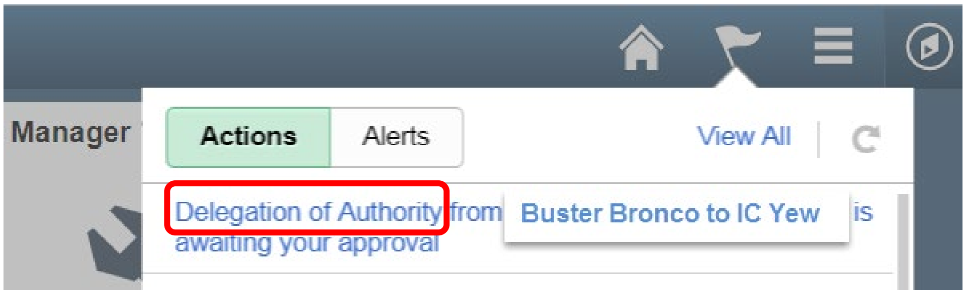
LOG OUT!

Manager Self Service (MSS) - Delegation

Process Overview – ACCEPTING A DELEGATION REQUEST	What is delegation? • Supervisors can delegate some or all of the Manager Self Service transactions (e.g. Termination, Ad Hoc Salary Changes) to one or more people. • Supervisors can specify whether s/he is delegating the authority to initiate a transaction or to approve a transaction. • Delegation can be permanent or temporary. NOTE: An HR Administrator oversees all delegation requests.
DELEGATION EXAMPLES	TEMPORARY Delegation • Buster, a dining service supervisor and a form approver, will be out of the office for sic (6) weeks. He can delegate his approval authority temporarily to another dining service supervisor or an Assistant Director until he returns PERMANENT Delegation – Option 1 • Sally, a Dean, prefers to have her Assoc Dean approve all of the department forms. She can delegation the approval authority on a permanent/indefinite basis PERMANENT Delegation – Option 2 • Asan, a director, wants to delegate Termination and Job Change approval authority to his Assistant Director, and keep Ad Hoc Salary Changes approvals for himself. These two transactions can be delegated on a permanent, indefinite basis to the Assistant Director
NOTIFICATION	When a transaction routes to an approver, the system automatically generates an email alerting the approver to a pending transaction. The approver needs to access Manager Self Service to take action on the request SAMPLE EMAIL: Buster Bronco or an administrator on behalf of Buster Bronco has submitted a delegation request to you. Here are the details: Transaction(s): Approve Termination From: 2019-06-27 To: 2019-06-28 System to notify Buster Bronco of each request: You can review the request, then accept or reject the request, using the link from your push notification list.
How do I do this?	First Access Manager Self Service via WMU Login

<table>
<tr><td>STEP 1</td><td>A the Manager Self Service landing page, there will be two options for accepting a delegation


request:

❶ Using the Approvals tile
❷ Using the Push Notification Flag</td></tr>
<tr><td>USING OPTION 1 – APPROVALS Tile</td><td>Clicking on the ‘Approvals’ tile will bring you to the ‘Pending Approvals’ page</td></tr>
<tr><td>OPTION 1 - STEP 2</td><td>Once the Transaction option has been selected for review, a list of names will appear
• The list appears with the ‘oldest’ form at the top of the list and the most recent submission at the bottom of the list
• Select the employee/transaction to a approve by clicking anywhere on the line</td></tr>
<tr><td></td><td></td></tr>
<tr><td>USING OPTION 2 – The PUSH NOTIFICATION Flag</td><td>Clicking on the Push Notifications Flag will bring up a listing of transactions pending approval


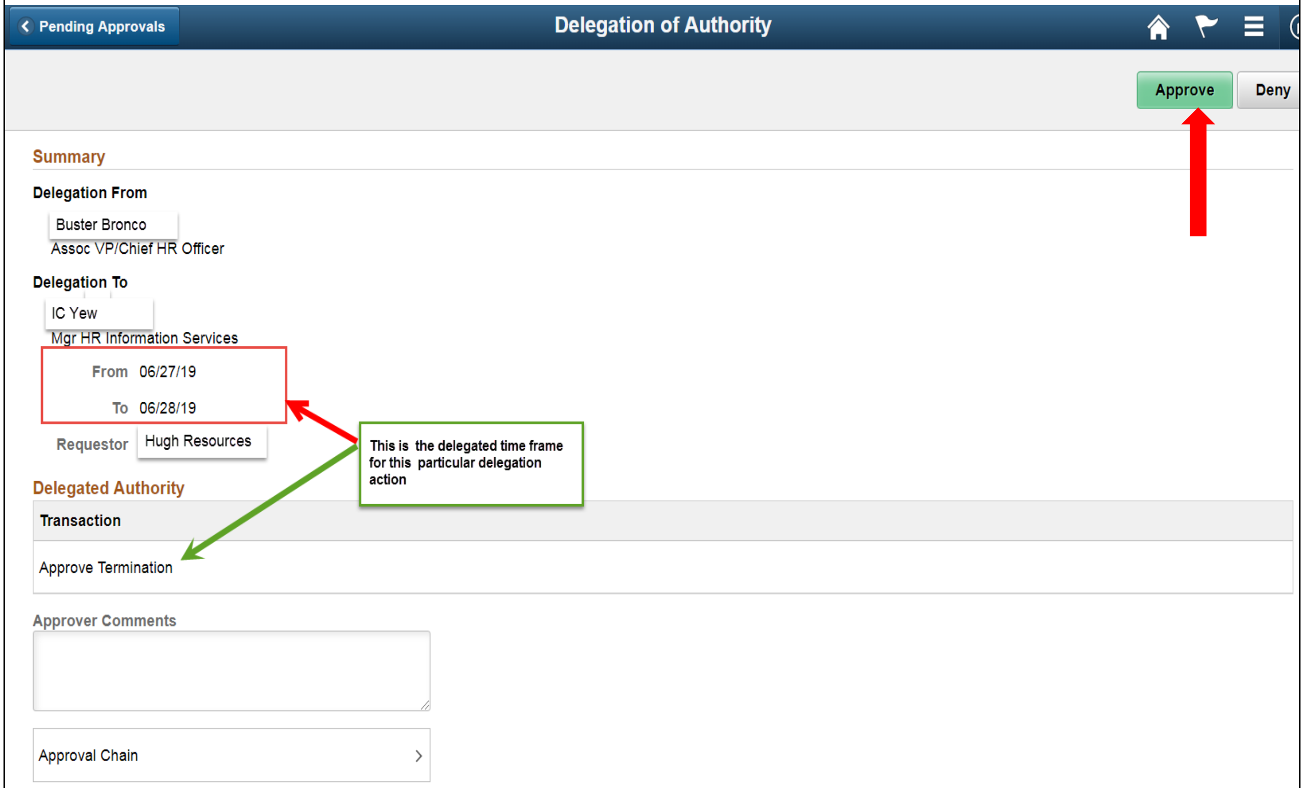
Delegation of Authority from Buster Bronco to IC Yew is awaiting your approval</td></tr>
</table>

OPTION 2 – Step 2

ALL OPTIONS - STEP 3

Once the transaction has been selected, the Delegation of Authority page will appear for review

Review both the timeframe (From, To) AND the Transaction type. If any questions, please contact the delegator, and/or HR.



Summary

Delegation From

Buster Bronco
Assoc VP/Chief HR Officer

Delegation To

IC Yew
Mgr HR Information Services

From 06/27/19
To 06/28/19
Requestor Hugh Resources

This is the delegated time frame for this particular delegation action

Delegated Authority

Transaction
Approve Termination

Approver Comments

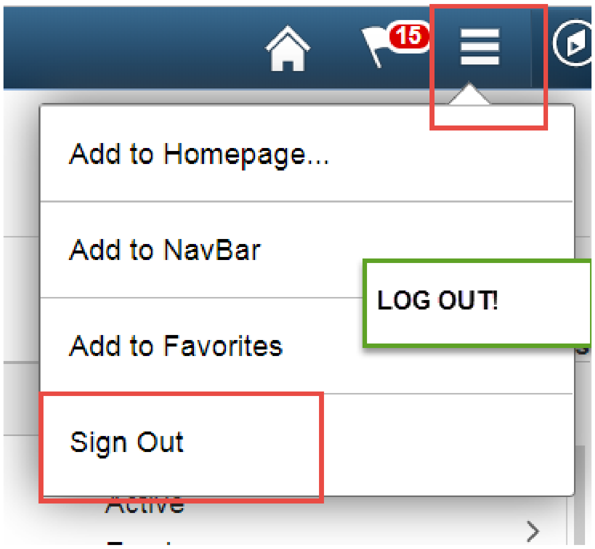
Approval Chain

Employees that accept an approval delegation will be sent an “Approver’s Guide’ to ensure s/he understands the importance of the approval responsibility and what to look for when reviewing a form

STEP 4

To accept the delegation, click the ‘Approve’ button in the upper right corner. To decline a delegation request, click the ‘Deny’ button.

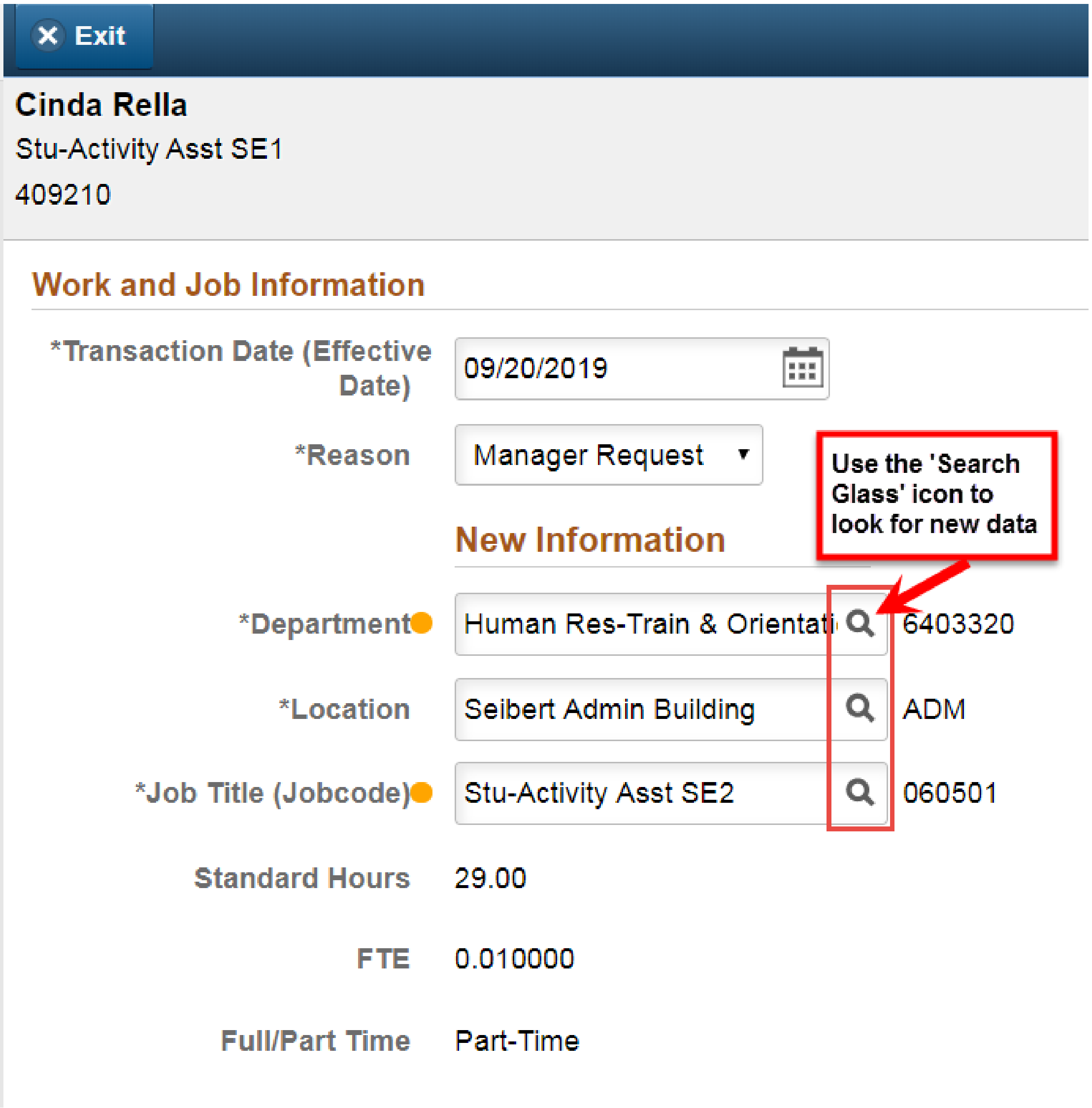
- If the delegation request is accepted (e.g. approved), there will be immediate authorization action.
    - When forms are initiated, you will start receiving the approval email notifications
- If the delegation request is declined (e.g. denied), you will not be able to approve any forms

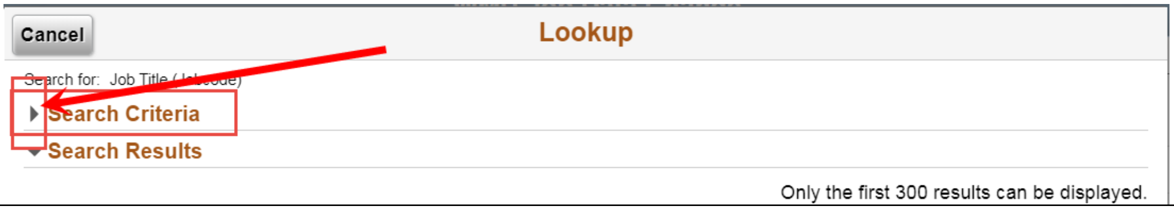
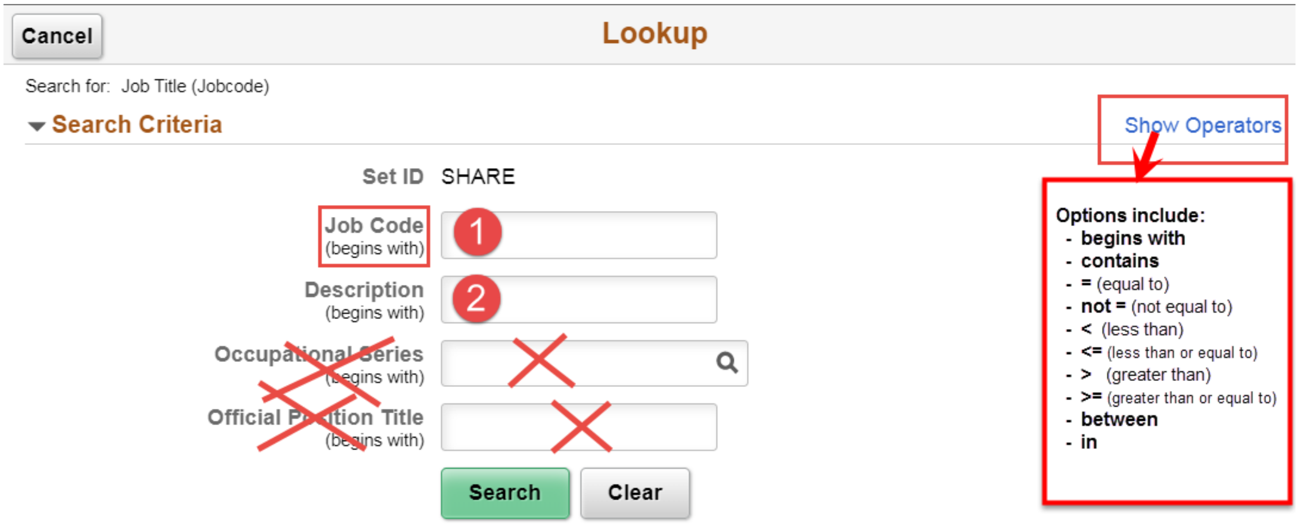
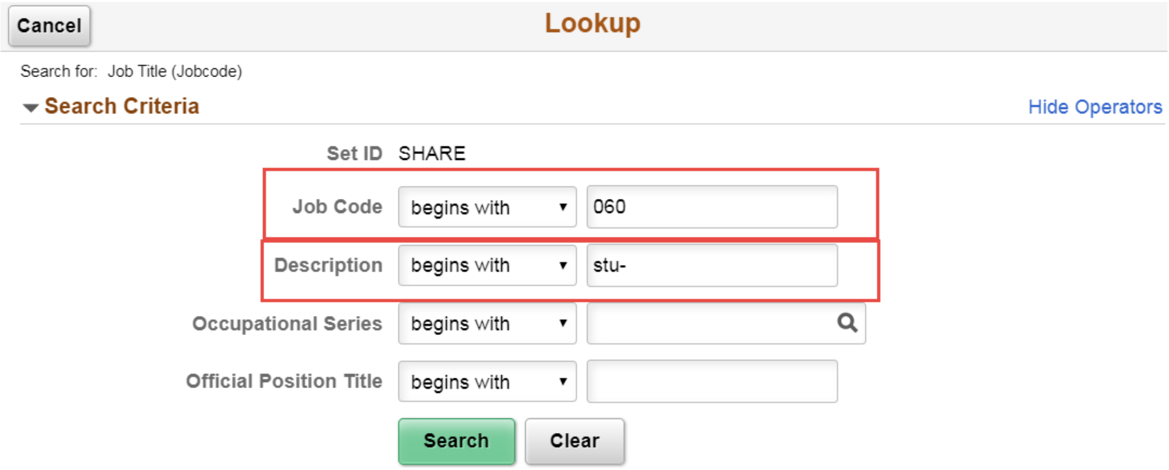
STEP 5	Once a request is accepted or declined, (e.g. the approve/deny button is clicked), you will receive an email notifying you of the approval/denial action: You have approved Delegation of Authority from Buster Bronco to IC Yew Transaction(s): Initiate Ad Hoc Salary Change From: 2019-06-28 To: 2019-07-01 • If there is an end date for the delegation (e.g. the delegation is temporary), the approval authorization will end automatically. • If the delegation is 'permanent', (e.g. no end date), an authorization form is needed to revoke/stop the access.
STEP 6	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click 'Sign Out' 

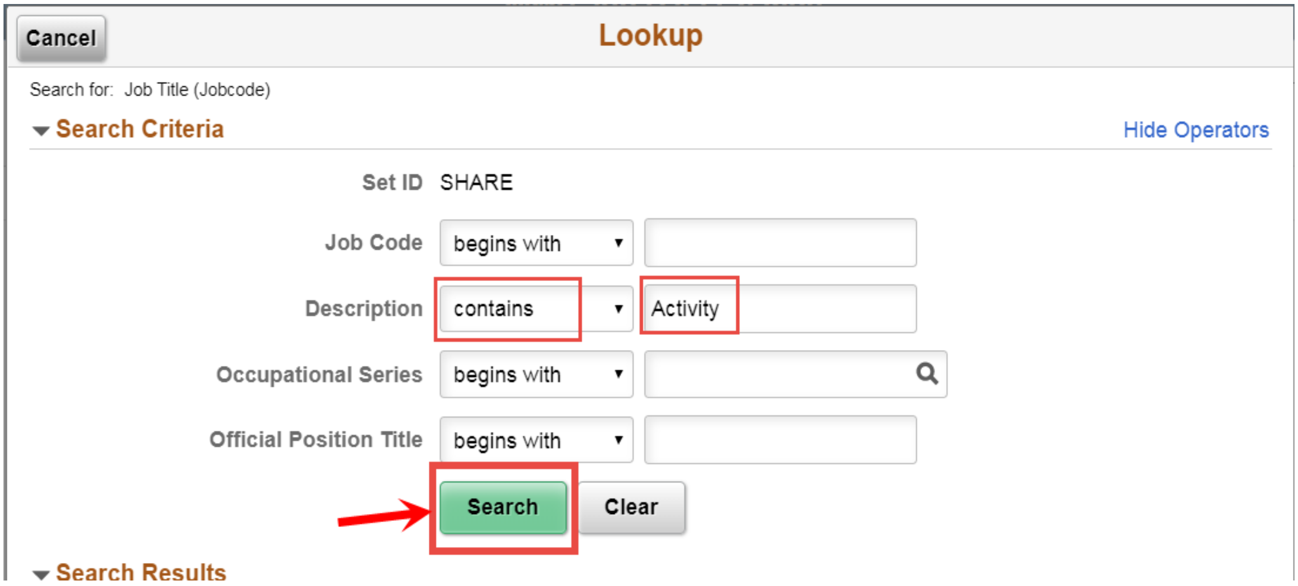
HELPFUL HINTS - DELEGATION

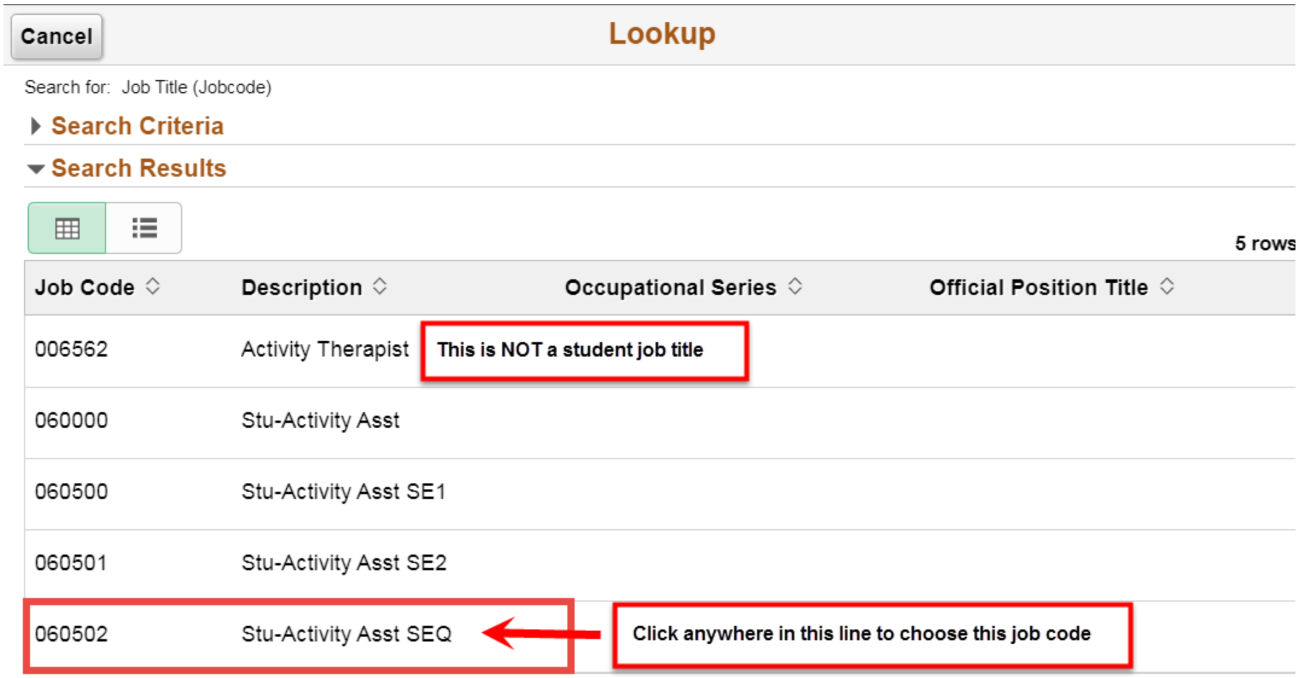
- Delegation can be temporary or 'permanent'.
- Delegation can be modified, but an 'Authorization to Delegate' form must be submitted to do so. The form is found on the HR Web site at: http://www.wmich.edu/hr/forms.html
- Once an employee moves to a new position/department, his/her approval/initiation access for the department is removed. **The new department will need to request delegation of any approval or initiation authorization.**

Manager Self Service (MSS) – Using the SEARCH Function

Process Overview – SEARCH FUNCTION	Some transactions in Manager Self Service will require you to search for the data needed to complete the 'new data' fields. For example, if you want to change the funding source, you will need to search for the new source via the search panel
How do I do this?	Click on the Search Glass icon that appears in the box  **Cinda Rella** Stu-Activity Asst SE1 409210 **Work and Job Information** *Transaction Date (Effective Date) 09/20/2019 *Reason Manager Request **New Information** *Department Human Res-Train & Orientati 6403320 *Location Seibert Admin Building ADM *Job Title (Jobcode) Stu-Activity Asst SE2 060501 Standard Hours 29.00 FTE 0.010000 Full/Part Time Part-Time Use the 'Search Glass' icon to look for new data

STEP 1	Clicking on the Search Glass brings up the “Lookup” panel. Click on the ‘Search Criteria’ option arrow  Search for: Job Title (Jobcode) Only the first 300 results can be displayed.
STEP 2	The ‘Lookup’ panel allows you to search for data several different ways: • By Job Code ❶ • By Description (job title) ❷ • By Occupational Series – **DO NOT USE** • By Official Position Title – **DO NOT USE** •  Search for: Job Title (Jobcode) Set ID SHARE Job Code (begins with) Description (begins with) Occupational Series (begins with) Official Position Title (begins with) Options include: - **begins with** - **contains** - **=** (equal to) - **not =** (not equal to) - **<** (less than) - **<=** (less than or equal to) - **>** (greater than) - **>=** (greater than or equal to) - **between** - **in**
STEP 3	When search for student data, here are a couple of tips” • Student job codes always start with ‘060’ • Student job TITLES/description always start with ‘Stu-‘  Search for: Job Title (Jobcode) Set ID SHARE Job Code begins with 060 Description begins with stu- Occupational Series begins with Official Position Title begins with

STEP 4	If you only have partial information (e.g. know that the job code description contains the word 'Mentor") you can click on the 'Show Operators' link at the top right corner of the page. This is will allow you to search using partial data: - begins with - contains - = (equal to) - not = (not equal to) - < (less than) - <= (less than or equal to) - > (greater than) - >= (greater than or equal to)
SAMPLE SEARCH 1	**SAMPLE Search** To look for a job title that contains the word 'Activity', choose the 'Description' box to search - Change the search operator to 'contains' - Type in 'Activity' in the search box - Click the 'Search' button  Lookup Search for: Job Title (Jobcode) Search Criteria Set ID SHARE Job Code begins with Description contains Activity Occupational Series begins with Official Position Title begins with Search Results
	SAMPLE Search Results The Search Results will bring up a list of job codes with 'Activity' in the description. Choose the one you want by clicking anywhere on the line - NOTE: Using this approach will also give you non-student titles. Be sure to select a title that starts with STU



Search for: Job Title (Jobcode)

5 rows

Job Code	Description	Occupational Series	Official Position Title
006562	Activity Therapist		
060000	Stu-Activity Asst		
060500	Stu-Activity Asst SE1		
060501	Stu-Activity Asst SE2		
060502	Stu-Activity Asst SEQ		

This is NOT a student job title

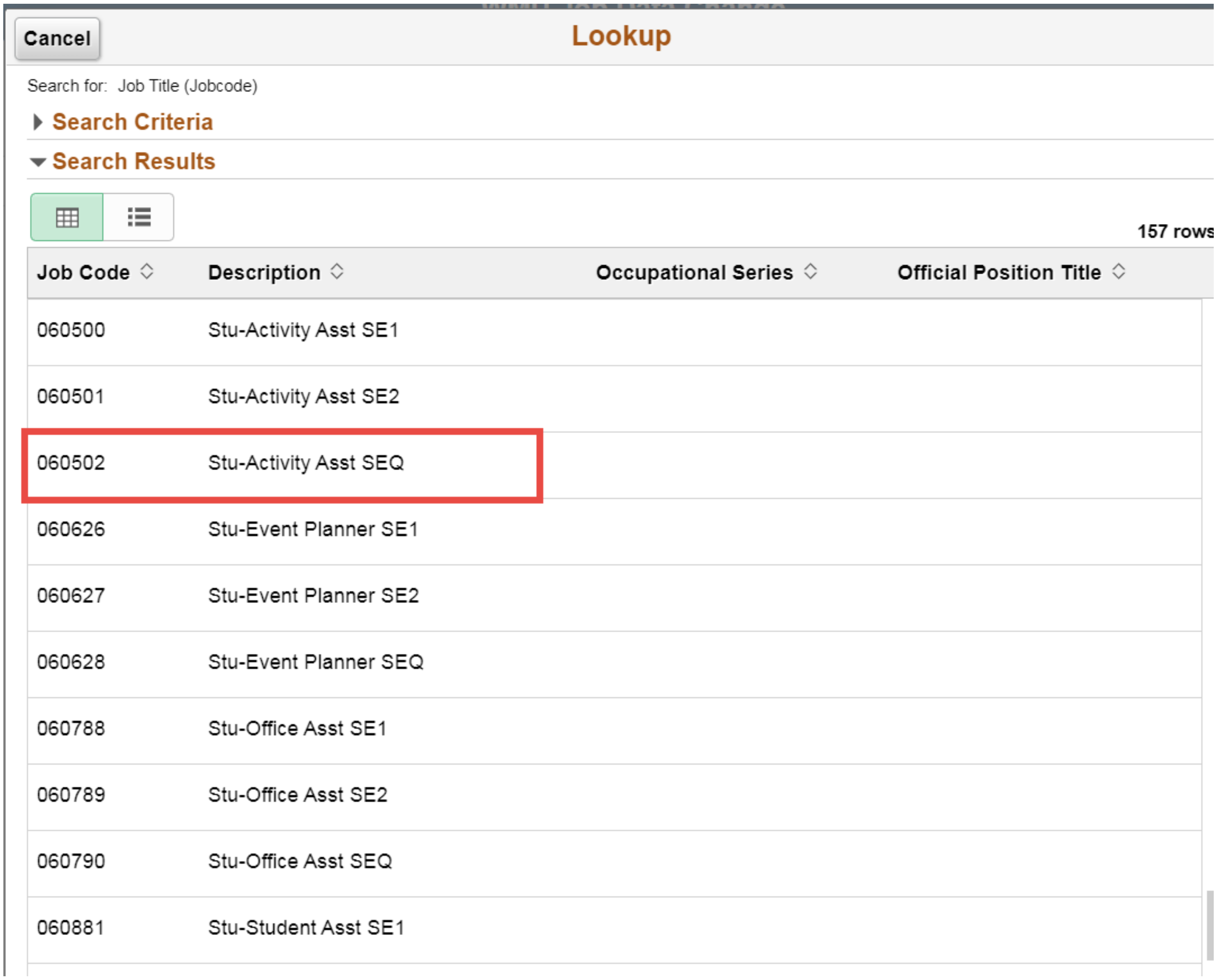
Click anywhere in this line to choose this job code

SAMPLE SEARCH 2

SAMPLE Search

To look for a job code that starts with 060, choose the ‘Job Code’ box to search

- Change the search operator to ‘contains’
- Type in 060 in the search box
    - Note: all student job code should be equal to or GREATER than 0605xx
- Click the ‘Search’ button
- All jobcodes that begin with 060xxx will appear; you may need to scroll to find the correct job code
    - Be sure to select the code with the correct grade (e.g. SE1, SE2, SEQ)

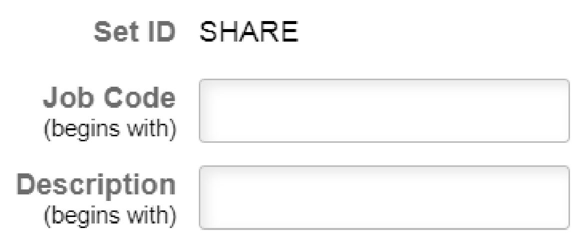


Search for: Job Title (Jobcode)

Job Code	Description	Occupational Series	Official Position Title
060500	Stu-Activity Asst SE1		
060501	Stu-Activity Asst SE2		
060502	Stu-Activity Asst SEQ		
060626	Stu-Event Planner SE1		
060627	Stu-Event Planner SE2		
060628	Stu-Event Planner SEQ		
060788	Stu-Office Asst SE1		
060789	Stu-Office Asst SE2		
060790	Stu-Office Asst SEQ		
060881	Stu-Student Asst SE1		

SAMPLE SEARCH 3

Leaving both job code and Description fields

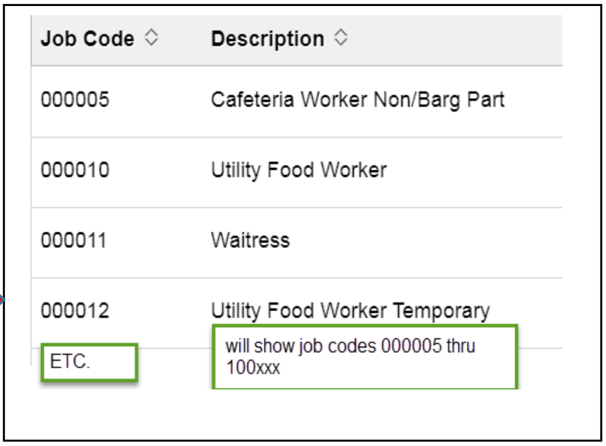


Set ID SHARE

Job Code (begins with)

Description (begins with)

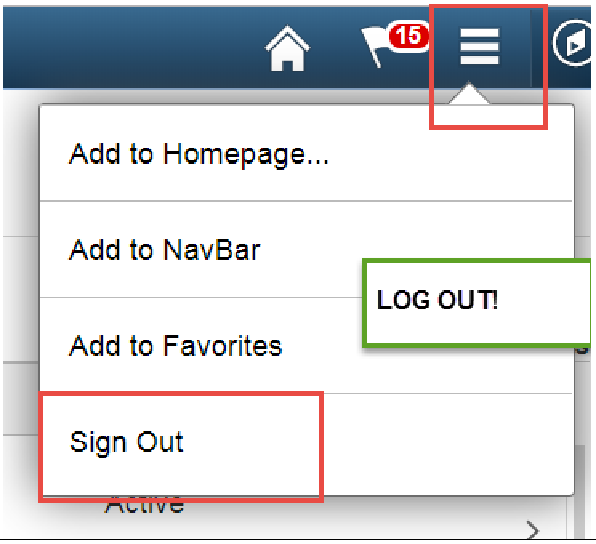
blank will pull up all available job codes



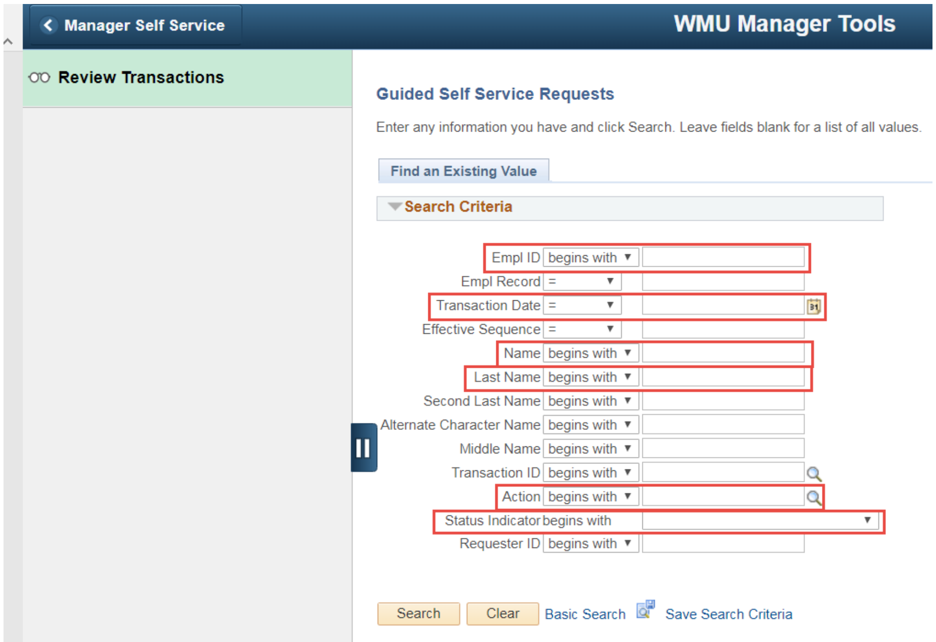
Job Code	Description
000005	Cafeteria Worker Non/Barg Part
000010	Utility Food Worker
000011	Waitress
000012	Utility Food Worker Temporary

ETC.

will show job codes 000005 thru 100xxx

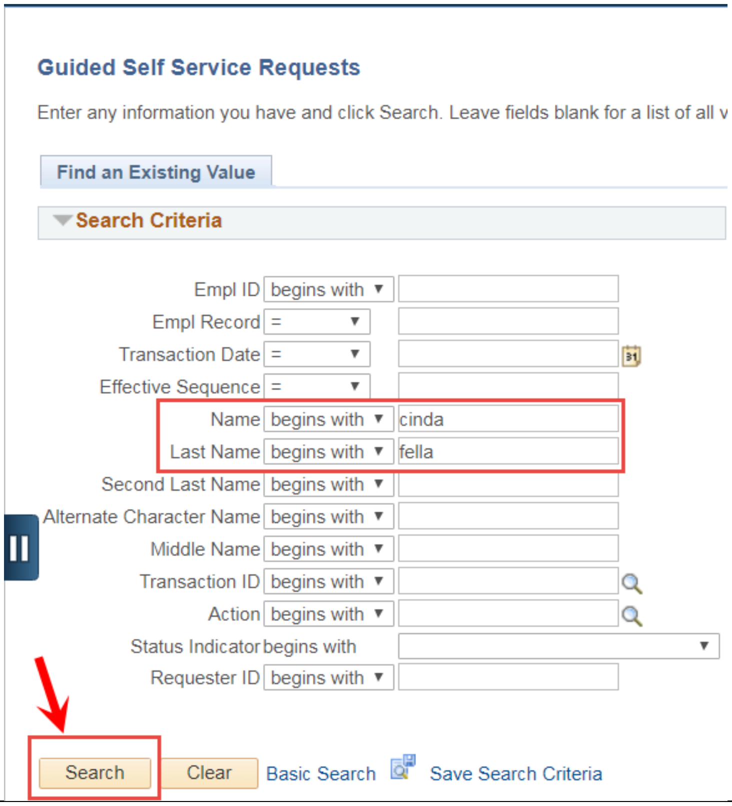
STEP 5	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click ‘Sign Out’ 

Manager Self Service (MSS) – ‘Form’ Status/Tracking a ‘Form’

Process Overview – TRACKING FORMS	Approvers & Initiators can check the status of and track the approval routing of all the transactions s/he has submitted or approved
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the ‘WMU Manager Tools’ tile 
STEP 2	The Review Transactions page appears with a ‘Guided Self Service Requests’ search box. Search using any number of the fields: • Employee ID (EmplID) – search for all transaction for one individual • Transaction date – search by date of transaction – will show one or multiple individual(s) • Name – Can be first Name or First & Last Name • Last Name – search by last name only • Action – search by the transaction type (e.g. Termination, Ad Hoc Salary Change, etc.) • Status Indicator – search by the process stage (e.g. Approved, Denied, Etc)  Guided Self Service Requests Enter any information you have and click Search. Leave fields blank for a list of all values.

STEP 3

Type data in your search selection and click the ‘Search’ button



Guided Self Service Requests

Enter any information you have and click Search. Leave fields blank for a list of all v

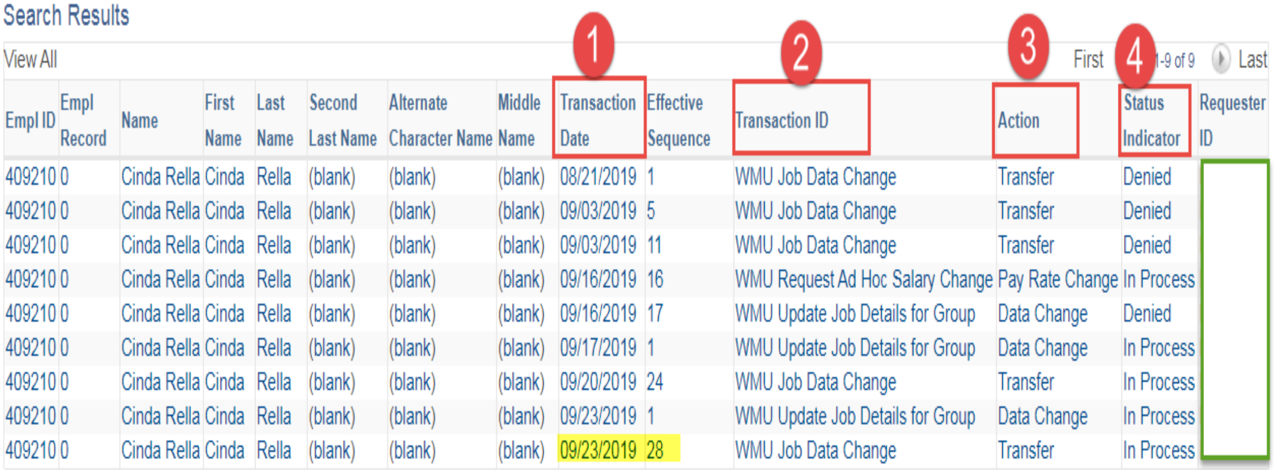
Empl ID begins with
Empl Record =
Transaction Date =
Effective Sequence =
Name begins with cinda
Last Name begins with fella
Second Last Name begins with
Alternate Character Name begins with
Middle Name begins with
Transaction ID begins with
Action begins with
Status Indicator begins with
Requester ID begins with

STEP 4

Search results will list all transactions (determined by the type of search)

Find the transaction you would like to check by using the following:

- Transaction Date - the Effective date of the transaction
- Transaction ID – the type of transaction taking place
- Action
- Success Indicator – e.g. the Status (In Process, Denied, Success)

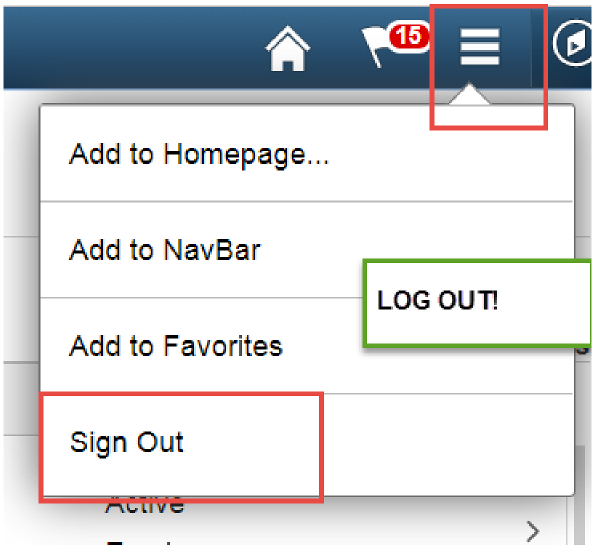


Search Results

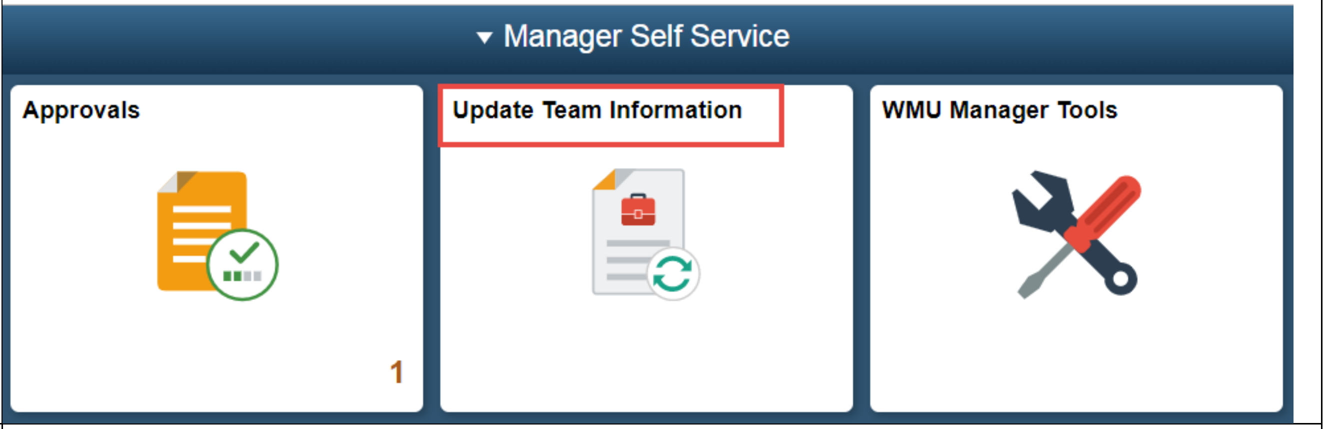
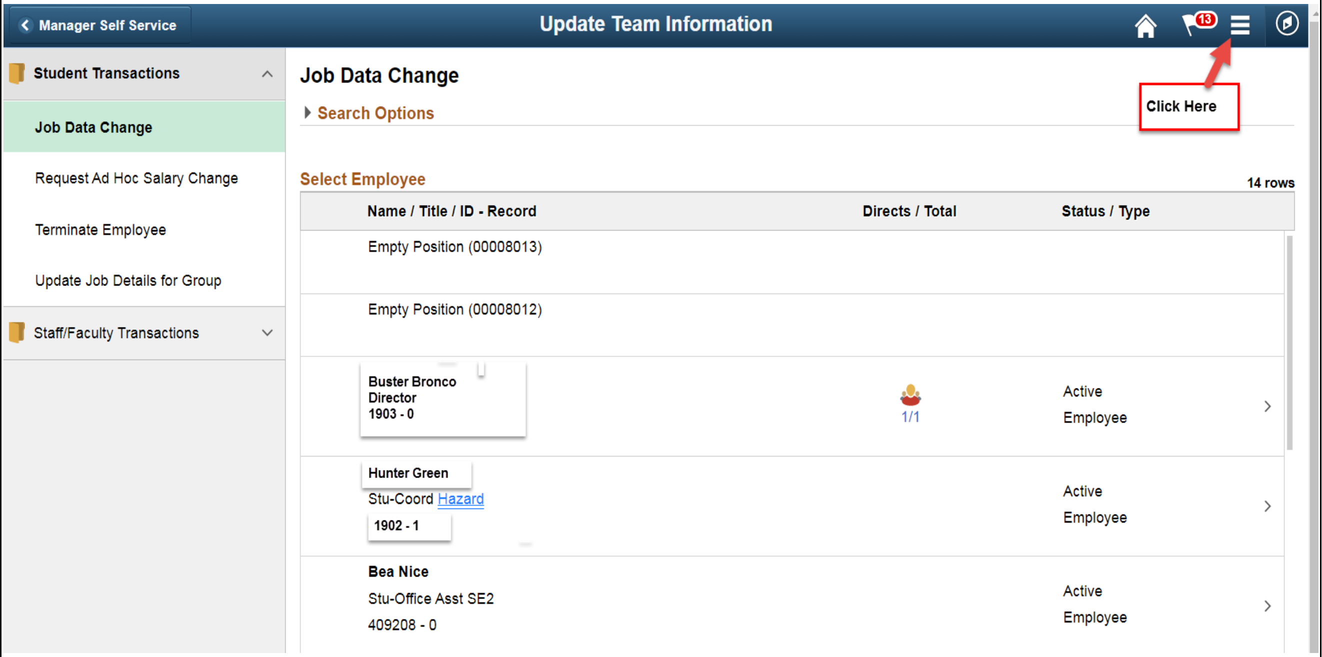
Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name	Transaction Date	Effective Sequence	Transaction ID	Action	Status Indicator	Requester ID
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	08/21/2019	1	WMU Job Data Change	Transfer	Denied	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/03/2019	5	WMU Job Data Change	Transfer	Denied	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/03/2019	11	WMU Job Data Change	Transfer	Denied	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/16/2019	16	WMU Request Ad Hoc Salary Change	Pay Rate Change	In Process	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/16/2019	17	WMU Update Job Details for Group	Data Change	Denied	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/17/2019	1	WMU Update Job Details for Group	Data Change	In Process	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/20/2019	24	WMU Job Data Change	Transfer	In Process	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/23/2019	1	WMU Update Job Details for Group	Data Change	In Process	
409210	0	Cinda Rella	Cinda	Rella	(blank)	(blank)	(blank)	09/23/2019	28	WMU Job Data Change	Transfer	In Process	

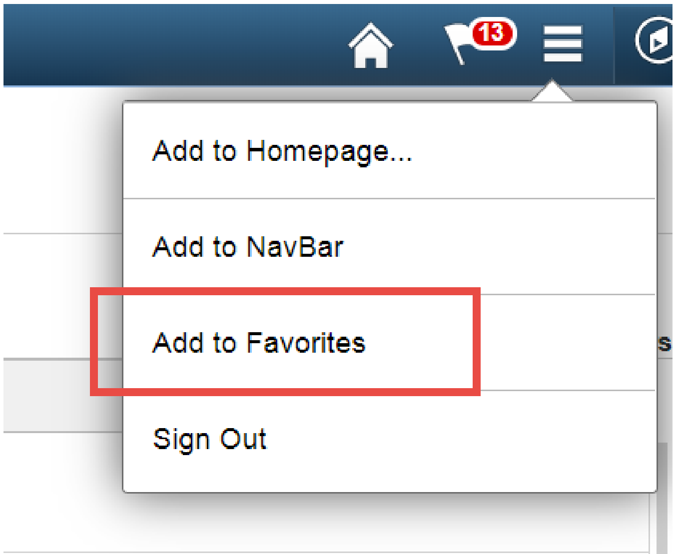
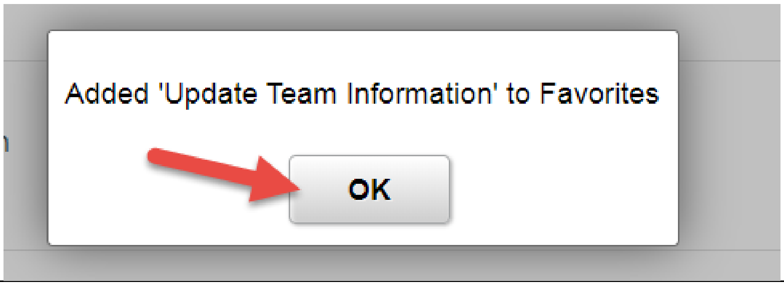
Click on any line to view specific transaction information

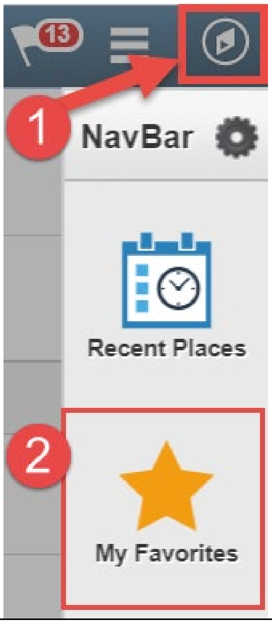
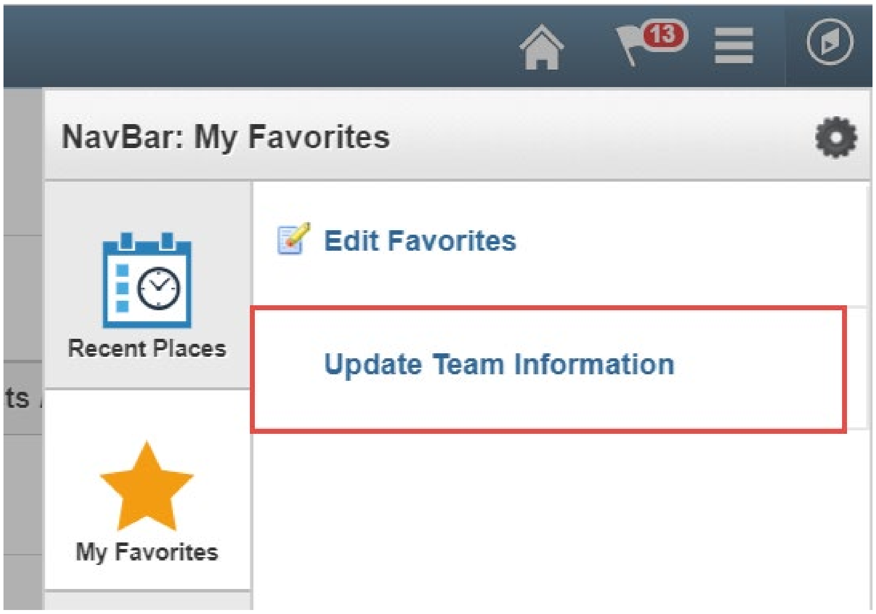
Make sure you LOG OUT once you are done with reviewing the tracking status

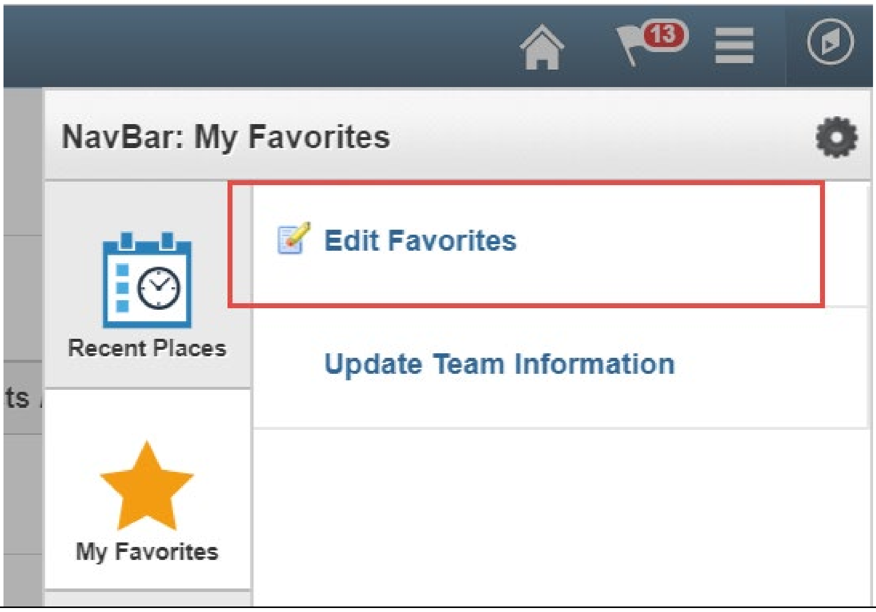
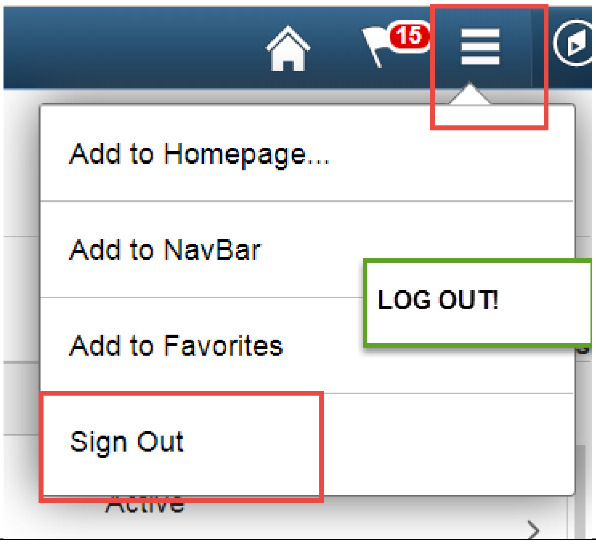
STEP 5	LOG OUT • Click on the 3-Bars in the top right corner • Once option box appears, click 'Sign Out'  LOG OUT!

Manager Self Service (MSS) – Creating “Favorites”

Process Overview – CREATING A FAVORITE	You can save a page that you use often to the ‘Favorites’ as a shortcut.
How do I do this?	First Access Manager Self Service via WMU Login
STEP 1	A the Manager Self Service landing page, click on the ‘Update Team Information’ tile 
STEP 2	The ‘Update Team Information Panel will appear. Click the ‘3 Bar’ icon at the top right corner  Name / Title / ID - Record | Directs / Total | Status / Type Empty Position (00008013) Empty Position (00008012) Buster Bronco, Director, 1903 - 0 | 1/1 | Active, Employee Hunter Green, Stu-Coord Hazard, 1902 - 1 | | Active, Employee Bea Nice, Stu-Office Asst SE2, 409208 - 0 | | Active, Employee

STEP 3	When the Options menu appears, click on ‘Add to Favorites’ 
STEP 4	A message will appear indicating you are adding this page ‘Update Team Information’ to your Favorites • Click ‘OK’  Added 'Update Team Information' to Favorites
STEP 5	Once you’ve clicked ‘OK’, you will be able to see the page link in the NavBar • Click on the ‘Compass’ at the top right corner ❶. This will open the NavBar options • Click on ‘My Favorites’ ❷

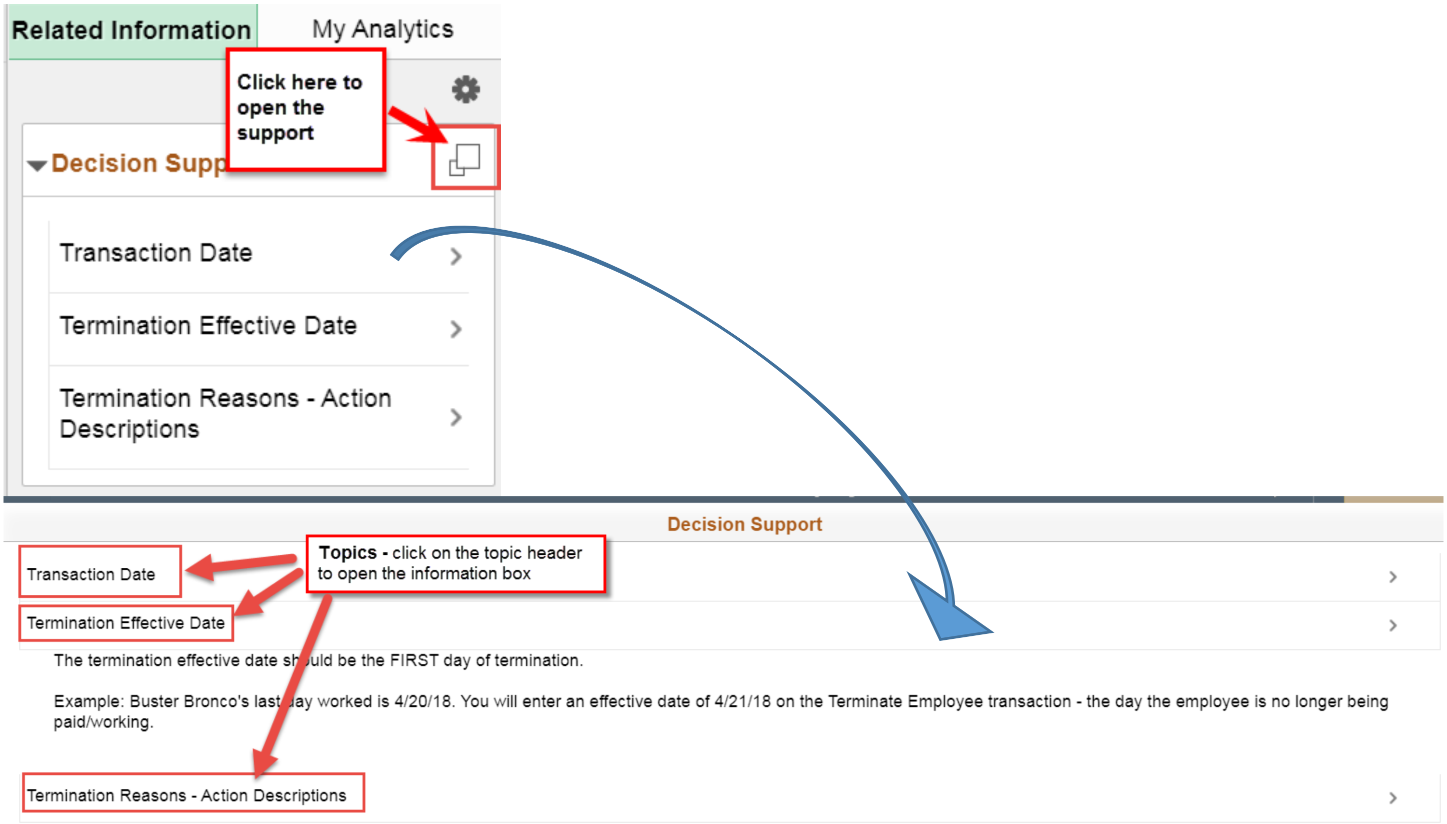
	
STEP 6	The My Favorites option bar will appear. Clicking on ‘Update Team Information’ will take you directly to the Update page 
STEP 7	You can add as many ‘Favorites’ as you want. Just be sure you are on the page that you want to save. Use the ‘Edit Favorites’ to remove or rename the page(s)

	
STEP 8	LOG OUT • Click on the ‘3-Bars’ icon in the top right corner • Once option box appears, click ‘Sign Out’ 

Decision Support Function

Every panel has a 'Decision Support' icon (found on the right side of the panel) that can be used to provide additional information and help when completing transactions.

To see the Decision Support information, click on the Decision Support icon. An information panel will appear with various options from which to choose.



The termination effective date should be the FIRST day of termination.

Example: Buster Bronco's last day worked is 4/20/18. You will enter an effective date of 4/21/18 on the Terminate Employee transaction - the day the employee is no longer being paid/working.

Helpful Hints

STUDENT CHANGES

- Student Appointments will default to FICA exempt, but FICA exemption may change based on automatic biweekly FICA review. To view criteria for FICA exemption visit the Payroll Web site at: http://www.wmich.edu/payroll/payroll/mypay/fica.html

- Changes to student WORK STUDY must be submitted via email to hr-hris@wmich.edu. In the email, include the effective date of the change, the student name, emplID, GL combo code & the change to work-study.

GRADUATE APPOINTMENT CHANGES

- When submitting a change in pay or appointment type for Graduate Appointments, a new appointment letter must be submitted to the Graduate College

Manager Self Service (MSS) vs. WORKFLOW – A CHEAT SHEET

PeopleSoft Human Resources

Manager Self Service Overview:
Manager Self Service is being rolled out allowing departments to submit transactions online and replacing the functionality of what is currently referred to as the SEOT system. Supervisors or their delegates initiate Manager Self Service transactions that are then routed to various approval points (depending on the transaction type and individual situation). Most transactions within Manager Self Service automatically update PeopleSoft job panels, requiring no manual HR data entry.

In the first phase of the roll-out, the following transactions with be available for hourly student employees and graduate assistants:

- Ad Hoc Salary Change (Pay Increase/Pay Decrease)
- Transfer Employee
  - Changes in GL combo code (fund/cost center)
  - Changes in Job Codes
  - Changes in Location
- Terminate Employee

Both Manager Self Service and the PeopleSoft Electronic Workflow are being used; Electronic Workflow is for appointments; MSS is for changing employee attributes. To help departments develop a better understanding of the functionality of both systems, below is a side-by-side comparison.

Function	**Manager Self Service**	**Electronic Workflow**
PRIMARY PURPOSE	Allows departments to process changes to employees such as pay changes, transfers and terminations. The approval process uses the 'Reports To' structure for routing. Most transactions automatically update the PeopleSoft job panel, eliminating time-consuming manual entry by the Human Resources staff.	Allows departments to hire student and temporary employees and graduate assistants without the use of paper forms using an approval process known as a workflow approval rule set. HR must still manually enter all appointments to the PeopleSoft database.
INITIATION	All supervisors automatically get Approver/Initiator access. Transactions are initiated by supervisors or their delegate.	Security role of "Workflow Initiator" must be requested and assigned, then employee may initiate workflow forms for any cost center.
APPROVAL ROUTING	Transactions automatically route to the initiator's supervisor (or the supervisor of the delegatee) and then, if necessary, to Grants, CSES or the Graduate College, before automatically updating the database.	Workflow approval rule sets are designed by the department and can include as many steps as the department finds necessary. Approvers at each level are based on employee position numbers. If approved by all levels, the form routes to Human Resources, where processing staff manually enter data.

AUTOMATIC DATABASE UPDATE	In most cases, the transaction will automatically update the PeopleSoft job panel. Cases where HR may need to perform manual entry included transactions where a future-dated row exists that is greater than the transaction date.	Human Resources perform all updates to the database manually.
DELEGATION	Supervisors may delegate the authority to either initiate transactions or approve transactions.	No functionality exists; the workaround would be to make changes to workflow approval rule sets, requiring extensive paperwork and manual entry.
HR'S ROLE	Instead of being the primary enterer of data into the database, HR's role will shift to the development of and review of daily audits to ensure automatic entry is accurate.	As workflow forms are received, processing staff manually enter data into job panels.

Contact information

Manager Self Service				
	Department	Telephone	Email	Web site
	Human Resources	269-387-3620	hr-hris@wmich.edu	wmich.edu/hr
	Payroll & Disbursements	269-387-2935	payroll-dept@wmich.edu	wmich.edu/payroll
	Grants & Contracts	269-387-4707	grants-sevices@wmich.edu	wmich.edu/grantscontracts/
	Career & Student Services	269-387-2745		wmich.edu/career/
	Graduate College	269-387-8212		wmich.edu/grad/