PeopleSoft Training Activity Sheet

Absence Management Refresher Session (AM1 & AM2)

For use in training. Last updated December 10, 2015.

Introduction

The purpose of the Absence Management Refresher Session is to practice entering absence events using the HCM Sandbox (SDHX) Database. The HCM Sandbox contains your district's information/data converted by the MITI Team for testing purposes only. The HCM Sandbox is a play environment for you to practice entering absences for your district's employees. The absences you enter in the HCM Sandbox for the Activities below will **NOT** get processed, in other words nothing will happen to these absence events; for example balances will not be updated or paid for any employee. **The Refresher Session is NOT to be used for validating your district's information/data from the conversion.**

AM Activity 1 – Enter Absence

Directions: Use the **Timesheet** screen (Navigation: *Main Menu > Manager Self Service > Time Management > Report Time > Timesheet*) to search for and select an employee (Employee ID) then enter an absence for the week(s) or calendar period of your choosing. You can approve the absences after entering them or wait and approve them later.

1. Add an absence event for one full day absence or leave requiring a balance, such as sick, vacation, personal business, personal necessity, etc.
2. Add an absence event for a partial day absence or leave requiring a balance, such as sick, vacation, personal business, personal necessity, etc.
3. Add an absence event for one full day absence or leave ***not*** requiring a balance, such as jury duty, bereavement, leave without pay, etc.
4. Add an absence event for a partial day absence or leave ***not*** requiring a balance, such as jury duty, bereavement, leave without pay, etc.
5. Repeat steps #1 through #4 for as many employees as desired.

Hint: *Remember you must click* ***Forecast*** *after entering an absence then click* ***Submit*** *to submit it. Also, do not enter exception time and an absence event then click* ***Submit*** *once, you must enter the exception time and click* ***Submit*** *then enter the absence and click* ***Forecast*** *followed by* ***Submit****. You can approve absence events on the* ***Timesheet*** *screen. Make sure you are still on the* ***Absences*** *tab then click the box under the* ***Select*** *column which will place a checkmark inside the box. Next, under the* ***Approval*** *section click* ***Approve*** *to approve the absence. All absence entries for Exception Hourly employees are automatically approved when entered.*

AM Activity 2 – Absence Queries: Part 1

Directions: The purpose of this activity is to review queries listing absences that have not been approved.

1. Navigate to the **Query Viewer** screen (*Main Menu* > *Reporting Tools* > *Query* > *Query Viewer*).
2. Search for *M_AM* to get a list of all Absence Management queries.
3. Run the queries listed below by clicking one of the options: *HTML*, *Excel* or *XML* (the *Excel* option will export the report to an MS Excel spreadsheet), which will open the query in a new, separate browser tab.
4. You can review the results online or download them by clicking one of the **Download results in** links.
5. Close the browser tab when finished viewing the query results.

Absences Not Submitted (M_AM_ABSENCES_NOT_SUBMITD): List of absences that have been entered and saved, but not submitted. Select a **Begin Date From** and **Begin Date To** covering the dates you want to review then click **View Results**.

Absence Workflow Status (M_AM_UNAPPROVED_ABSENCES): List of absences that need to be approved.

AM Activity 3 – Update Absence

Directions: Use the **Timesheet** screen (Navigation: *Main Menu* > *Manager Self Service* > *Time Management* > *Report Time* > *Timesheet*) to search for and select an employee (Employee ID) then update, adjust and/or cancel an absence for the week(s) or calendar period of your choosing. You can approve the absences after updating them or wait and approve them later.

1. Update a one full day absence or leave requiring a balance, such as sick, vacation, personal business, personal necessity, etc., to be more than one day.
2. Change the number of hours for a partial day absence or leave requiring a balance, such as sick, vacation, personal business, personal necessity, etc.
3. Cancel a full day absence or leave ***not*** requiring a balance, such as jury duty, bereavement, leave without pay, etc.
4. Change a partial day absence or leave ***not*** requiring a balance, such as jury duty, bereavement, leave without pay, etc. to a full day absence.
5. Repeat steps #1 through #4 for as many employees as desired.

Hint: *Remember you must click the* ***Edit*** *button first (on the right-hand side of the row containing the absence), then update, adjust and/or cancel an absence event. You must click* ***Forecast*** *after entering an absence then click* ***Submit*** *to submit it. You can approve absence events on the* ***Timesheet*** *screen. Make sure you are still on the* ***Absences*** *tab then click the box under the* ***Select*** *column which will place a checkmark inside the box. Next, under the* ***Approval*** *section click* ***Approve*** *to approve the absence. All absence entries for Exception Hourly employees are automatically approved when entered.*

To cancel an absence event click ***Edit*** *on the row containing the absence then click the box under Cancel (this will put a checkmark inside the box) and click the* ***Submit*** *button (you do not have to click* ***Forecast*** *when cancelling an absence event).*

AM Activity 4 – Absence Balances

Directions: Use the **Results by Calendar** screen (Navigation: *Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar*) to search for and select an employee (Employee ID) then review their current absence or leave balances.

You can also see an employee's absence or leave balances on the following screens and query:

1. **Timesheet** screen (Navigation: *Main Menu > Manager Self Service > Time Management > Report Time > Timesheet*) which shows the balances as of the last pay period processed. In other words this is a static snapshot of the employee's balances after the last pay period was processed. The system will not change these balances when absences are entered (taken) or adjusted.
2. **Absence Balance** screen (Navigation: *Main Menu > Manager Self Service > Time Management > Report Time > Absence Request*) which shows current balances.
3. **District Balances (M_AM_DISTRICT_BALANCES)** query (Navigation: *Main Menu > Reporting Tools > Query > Query Viewer*, then search for *M_AM*). This query provides a list of your district's employees who have absence balances and includes the employee's balances for each absence type.

Please Note: *The Refresher Session is **NOT** to be used for validating your district's information/data from the conversion, for example converted absence or leave balances.*

AM Activity 5 – Adjust Balances

Directions: Use the **Adjust Balances > Absences** screen (Navigation: *Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences*) to search for and select an employee (Employee ID) then adjust one or more of their absence balances, such as vacation, sick, etc.

Hint: *Remember if you want to increase the balance enter a positive value in the Balance Adjustment field, if you want to decrease the balance enter a negative value. Do not change the date range listed for the adjustment. If you need to enter the adjustment in another period, exit this page, go back to the search results, and select the correct period. The adjustment will not get applied until the Absence Calc process runs, which is NOT scheduled to run in the HCM Sandbox (the Absence Calc process runs automatically every night in Production).*

AM Activity 6 – Leave Payout

Directions: Use the **Absence Event** screen (Navigation: *Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event*) to search for and select an employee (Employee ID) then enter sick and vacation payouts.

Hint: *You must look up the employee's current sick and vacation balances before you can enter the payout.* ***Please refer to page 53 in the Absence Management Guide for Leave Payout Rules****.*

AM Activity 7 – Absence Queries: Part 2

Directions: The purpose of this activity is to review several Absence Management queries.

1. Navigate to the **Query Viewer** screen (*Main Menu* > *Reporting Tools* > *Query* > *Query Viewer*).
2. Search for *M_AM* to get a list of all Absence Management queries.
3. Run the queries listed below by clicking one of the options: *HTML*, *Excel* or *XML* (the *Excel* option will export the report to an MS Excel spreadsheet), which will open the query in a new, separate browser tab.
4. You can review the results online or download them by clicking one of the **Download results in** links.
5. Close the browser tab when finished viewing the query results.

Accrual Hours Factor (M_AM_ACCRUAL_HRS_FACTOR): List of employees and their Accrual Hours Factor from the Job Data screen. Enter your 3-digit **District** then click **View Results**.

District Accruals (M_AM_DISTRICT_ACCRUALS): List of your district's employees who have absence accruals and includes the employee's accruals for each absence type. Enter your 3-digit **District** and then click **View Results**.

Maximum Vacation Summary (M_AM_OVER_VAC_MAX): List of employees who have excess vacation left over that has not been taken at the end of the year. Enter your 3-digit **District** and the **Year(yyyy)-Month(mm)** you want to process then click **View Results**.

Sick and Vacation Liability (M_AM_SICK_VAC_LIABILITY): List of employees and their sick/vacation balances during a given month. Enter the **Year(yyyy)-Month(mm)** you want to process and select the **Absence Group** you want to process (or type a percent sign (%) to select all absence groups) then click **View Results**.

AM Activity 8 – Absence Request Screen (Optional)

Directions: This is an optional activity. Use the **Absence Request** screen (Navigation: *Main Menu* > *Manager Self Service* > *Time Management* > *Report Time* > *Absence Request*) to search for and select an employee (Employee ID) then enter an absence for the week(s) or calendar period of your choosing.

AM Activity 9 – Absence Event Screen (Optional)

Directions: This is an optional activity. Use the Absence Event screen (Navigation: *Main Menu* > *Global Payroll & Absence Mgmt* > *Payee Data* > *Maintain Absences* > *Absence Event*) to search for and select an employee (Employee ID) then update an absence request(s).