

How to Implement PeopleSoft ESS Absence Requests and Approvals

Version 1.1 | May 17, 2019

PeopleSoft Employee Self-Service (ESS) Absence Requests and Approvals allows your employees to use ESS to submit leave requests that managers (“Reports To”) approve online. This document outlines the steps to take to implement ESS Absence. NOTE: If you only want to implement the read-only version of Absence Request History and Absence Balances, this document does not pertain to you. Please contact Peyri Herrera (pherrera@sdcoe.net) with questions.

Part I. Learn

1. **Watch a Third Thursday Demo.** Watch the 1-hour demo of PeopleSoft ESS Absence Requests. This was the May 2016 Third Thursday demo. In this demo we show you what it looks like when an employee enters his/her absence request in PeopleSoft ESS (Employee Self-Service) and how a manager approves the request, also from ESS. This demo is appropriate for districts and charter schools interested in implementing absence request entry in ESS.
Links: [Demo](#) | [PeopleSoft ESS Absence Requests Presentation v1.0.pptx](#)
2. **Review the directions in the ESS Guide.** Refer to the directions for employees and managers in the [PeopleSoft Employee Self-Service Guide v2.0.pdf](#). Refer to pages specific to Absences. There is a section for all employees and a section for managers only.

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Part II. Audit and Clean Up Data

3. **Audit your “Reports To” on Positions.** When an employee submits an absence request, it sends an email to their manager (“reports to”). For this reason, you want to make sure all of the “Reports To” are correct. In PeopleSoft HCM run the M_POSITION_REPORTS_TO query to review HCM routing of absences (and TB). The query returns information about the Employee (ID, Name, Empl Record, Dept ID, Position) and who he/she reports to (Position, Supervisor ID, Name, Empl Record, Status, Title). **Make any fixes to “Reports To” needed. This must be done prior to implementing ESS Absence.**

Sample query results:

M_POSITION_REPORTS_TO - Reports To Data by EE and Pos

District (xxx): 020

View Results

Download results in: Excel Spreadsheet CSV Text File XML File (1835 kb)

View All

First 1-100 of 3585 Last

District	ID	EE Name	Empl Record	Dept ID	Position	Position Descr	Reports To	Supervisor ID	Supervisor Name	Supervisor EE Rec	Supervisor Empl Status	Supervisor Title
1	020			0 420	10204281	Senior Custodian	10204200			0	Active	Principal
2	020			0 562	10206014	Child Nutrition Worker I	10206170			0	Active	Director, Child Nutrition
3	020			0 360	10203600	Principal	10200001			0	Active	Superintendent
4	020			0 516	10205050	Computer Support Technician	10205057			0	Active	Technology Manager
5	020			0 420	10204228	Teacher	10204305			0	Active	Principal
6	020			0 330	10203313	Teacher	10203313			0	Active	Principal
7	020			0 510	10205024	Office Assistant II	10201020			0	Active	Director, Tech & Learn Resrces
8	020			0 973	10206048	Child Nutrition Worker I	10206170			0	Active	Director, Child Nutrition
9	020			0 150	10201505	Reading Intervention	10201500			0	Active	Principal
10	020			2 562	10206044	Child Nutrition Worker I	10206170			0	Active	Director, Child Nutrition

4. **Audit email addresses.** An employee has an employee record and a user record in PeopleSoft. When an employee submits an absence request, it sends the employee an email confirmation to the employee's Personal Info email address (HR record); it sends the manager ("reports to") an email approval to the manager's User Profile email address. In HCM run the M_EMPLOYEE_VS_USER query for a list of Personal Info and User Profile email addresses. If an email address is missing or incorrect, it needs to be fixed. More information is in this job aid: [Employee Names vs User Names](#).
 - a. **Check Column G - Personal Info Email.** This is the email address that is entered at Main Menu > Workforce Administration > Personal Information > Personal Information. This email is for: (1) TB test email notifications, (2) Credentials email notifications, and (3) Absence Request email notifications sent to the employee (requester). The HR Department can update this email address. (NOTE: Some districts allow employees to update this in Employee Self-Service because they have activated the Personal Information pagelet.)
 - b. **Check Column H - User Profile Email.** This is the email address on the user account and is changed by the employee (user) in PeopleSoft ESS, Portal, or HCM from Main Menu > My (System) Profile. Additionally, the staff within your organization who handle your password resets can change the User email address from the Distributed User Profile screen. The system sends messages to this email address for: (1) Workflow email notifications for approvals, (2) Password reset email with temporary password, and (3) Absence Request approval email notifications sent to the manager (approver).
5. **Audit who has the M_ABSENCE_ADMIN role.** If the "Reports To" field for an employee's position doesn't have a valid position number listed or there is no Supervisor in the position listed, the absence submitted by the employee will be routed to all users who have M_ABSENCE_ADMIN role and have row security access to the employee's job data. In other words, it goes to a pool of people. One person will then need to approve the absence. For this reason you want to be sure that the correct employees are in the M_ABSENCE_ADMIN role. In HCM, review the M_USER_ROLES query, filtered by M_ABSENCE_ADMIN. Submit a service ticket to the CRC to request that the M_ABSENCE_ADMIN role is added or removed from users.

Part III. Submit the Participation Form and Prepare Employees

6. **Submit the participation form.** Use the [PeopleSoft ESS Participation Form](#) to indicate that you want to activate the Absence pagelet as of a particular date. Peyri Herrera will receive the form, create a service ticket, and work with your identified contact on this request.

	No, not at this time	Yes	I don't know
Absence Request (Data Entry and Approvals)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

7. **Prep your Payroll and HR Departments.** Explain the forthcoming changes.
8. **Communicate the changes to all employees.** Examples of information to include in your communication:
 - a. What will change for the employees, the date of the change, and why the change is occurring
 - b. A set of brief directions
 - c. Link to full directions (for example, you can point them to the [ESS Guide](#) from Step 2)
 - d. For managers, be sure to point them to the ESS Guide or other directions for approving absence requests
 - e. Some districts conduct online or classroom-based training