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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 online 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’

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

<table>
<thead>
<tr>
<th>Select Employee</th>
<th>Name / Title / ID - Record</th>
<th>Directs / Total</th>
<th>Status / Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alfred Newmann</td>
<td>GA/DA-Grad Asstshp 1/2-GAA</td>
<td></td>
<td>Active Employee</td>
</tr>
<tr>
<td></td>
<td>409207 - 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Autumn Leaves</td>
<td>Stu-Office Asst SE1</td>
<td></td>
<td>Active Employee</td>
</tr>
<tr>
<td></td>
<td>409211 - 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Autumn Leaves</td>
<td>GA/DA-Grad Asstshp 1/2-GAA</td>
<td></td>
<td>Active Employee</td>
</tr>
<tr>
<td></td>
<td>409211 - 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cherry Pitts</td>
<td>Stu-Office Asst SE2</td>
<td></td>
<td>Active Employee</td>
</tr>
<tr>
<td></td>
<td>409204 - 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cherry Pitts</td>
<td>Stu-Activity Asst SE2</td>
<td></td>
<td>Active Employee</td>
</tr>
<tr>
<td></td>
<td>409204 - 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cinda Rella</td>
<td>Stu-Office Asst SE1</td>
<td></td>
<td>Active Employee</td>
</tr>
<tr>
<td></td>
<td>409210 - 0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**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.

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
- Verify the Pay Change reason is “Adjustment”
- Add Comments for documentation & clarification

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.

STEP 8 Success Message should appear
- If the Transaction was successfully submitted, you should see a message appear on the submission page.
- You will also see the next person in the form approval chain.
HELPFUL HINTS - INITIATION
- When you are entering data to the form, you can get online help quickly by clicking on the Decision Support icon.
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**
- At 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’

**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
STEP 5

The Job Data panel will appear:

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 on 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’
| STEP 7 | UPDATE the appropriate fields  
| | o 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  
| | o See instructions on how to use the search functions |

<table>
<thead>
<tr>
<th>Work and Job Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Transaction Date (Effective Date)</td>
</tr>
<tr>
<td>*Reason</td>
</tr>
<tr>
<td>New Information</td>
</tr>
<tr>
<td>*Department</td>
</tr>
<tr>
<td>*Location</td>
</tr>
<tr>
<td>*Job Title (Jobcode)</td>
</tr>
<tr>
<td>Standard Hours</td>
</tr>
<tr>
<td>FTE</td>
</tr>
<tr>
<td>Full/Part Time</td>
</tr>
</tbody>
</table>

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

| 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  
| | o 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.

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
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.

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

<table>
<thead>
<tr>
<th>Process Overview – TERMINATION</th>
<th>PeopleSoft Manager Self Service allows departments to submit termination transactions for its employees online.</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I do this?</td>
<td>First Access Manager Self Service via WMU Login</td>
</tr>
<tr>
<td><strong>STEP 1</strong></td>
<td>A the Manager Self Service landing page, click on the 'Update Team Information' tile</td>
</tr>
<tr>
<td><img src="image" alt="Manager Self Service" /></td>
<td>The 'Update Team Information Panel will appear.</td>
</tr>
<tr>
<td></td>
<td>At the left side of the panel, select the ‘Student Transactions’ option &amp; click on the down arrow to get the transaction options available</td>
</tr>
<tr>
<td><strong>STEP 2</strong></td>
<td></td>
</tr>
</tbody>
</table>

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16
**STEP 3**

Once the Transaction options appear, click on 'Terminate 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.
| 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  
|        | o This date should be the FIRST DAY OF TERMINATION  
|        | o If the employee's 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  
|        | o Click on the ‘down’ arrow and select the pay change reason  
|        | o 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.  
|        | o Verify you are selecting the correct job to terminate by checking the Department (e.g. cost center) and the Job title  
|        | 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 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

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
STEP 9 LOG OUT

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

STEP 4  
At the 'Questionnaire' page, select 'Yes' or 'No' for each question.
STEP 5  At the Group Update panel, enter
1. The Effective Date of the transaction AND
2. The new information
3. Click ‘Next’

STEP 6  Review Information and add COMMENTS
- Click SUBMIT when done

STEP 7  You should see the ‘Successfully Submitted’ message appear, which means the transaction is complete
# 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**

Access the Manager Self Service landing page, there will be two options for approving forms:

1. Using the Approvals tile
2. 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).
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

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Reason - Adjustment</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Salary Change</td>
<td>Escalated</td>
<td></td>
</tr>
<tr>
<td>Cherry Pitts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>409204</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer Employee</td>
<td>Escalated</td>
<td></td>
</tr>
<tr>
<td>Alfred Newmann</td>
<td></td>
<td></td>
</tr>
<tr>
<td>409207</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer Employee</td>
<td>Escalated</td>
<td></td>
</tr>
<tr>
<td>Cinda Relia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Autumn Leaves</td>
<td></td>
<td></td>
</tr>
<tr>
<td>409211</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td>Group Update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cherry Pitts</td>
<td></td>
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<tr>
<td>409204</td>
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<td></td>
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<tr>
<td>Group Update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cinda Relia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

TOTAL Number of transactions waiting for review

Can select a single transaction to review

USING OPTION 2 - The PUSH NOTIFICATION Flag

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

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.

Clicking on Salary Change Details will bring up a ‘Details’ panel.
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

![Image of a form with 'Approve' and 'Deny' buttons]

### 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’

![Image of the PeopleSoft log out option]
### 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
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.
- 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.

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.
STEP 5
Once submitted a very quick message will appear indicating successful approval.
• The names/transaction will have disappeared from the Pending Approval list

STEP 6
LOG OUT
• Click on the 3-Bars in the top right corner
• Once option box appears, click ‘Sign 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 |
**STEP 1**

A the Manager Self Service landing page, there will be two options for accepting a delegation request:

1. Using the Approvals tile
2. Using the Push Notification Flag

**USING OPTION 1 – APPROVALS Tile**

Clicking on the ‘Approvals’ tile will bring you to the ‘Pending Approvals’ page.

**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.
- Select the employee/transaction to 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.

![Pending Approvals Page](image-url)
### 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.

![Delegation of Authority page](image)

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](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.**
**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.

![Search Glass Icon](image)

**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 & Orientation
- **Location:** Selbert Admin Building
- **Job Title (Jobcode):** Stu-Activity Asst SE2

- **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

STEP 2
The ‘Lookup’ panel allows you to search for data several different ways:
- By Job Code ✅
- By Description (job title) ✅
- By Occupational Series – DO NOT USE
- By Official Position Title – DO NOT USE

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-’
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

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
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 job codes 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)

**Sample Search**

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Description</th>
<th>Occupational Series</th>
<th>Official Position Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>006562</td>
<td>Activity Therapist</td>
<td></td>
<td>This is NOT a student job title</td>
</tr>
<tr>
<td>060000</td>
<td>Stu-Activity Asst</td>
<td></td>
<td></td>
</tr>
<tr>
<td>060500</td>
<td>Stu-Activity Asst SE1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>060501</td>
<td>Stu-Activity Asst SE2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>060502</td>
<td>Stu-Activity Asst SEQ</td>
<td></td>
<td>Click anywhere in this line to choose this job code</td>
</tr>
</tbody>
</table>
Leaving both job code and Description fields blank will pull up all available job codes.

**Sample Search 3**

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>060500</td>
<td>Stu-Activity Asst SE1</td>
</tr>
<tr>
<td>060501</td>
<td>Stu-Activity Asst SE2</td>
</tr>
<tr>
<td><strong>060502</strong></td>
<td><strong>Stu-Activity Asst SEQ</strong></td>
</tr>
<tr>
<td>060626</td>
<td>Stu-Event Planner SE1</td>
</tr>
<tr>
<td>060627</td>
<td>Stu-Event Planner SE2</td>
</tr>
<tr>
<td>060628</td>
<td>Stu-Event Planner SEQ</td>
</tr>
<tr>
<td>060788</td>
<td>Stu-Office Asst SE1</td>
</tr>
<tr>
<td>060789</td>
<td>Stu-Office Asst SE2</td>
</tr>
<tr>
<td>060790</td>
<td>Stu-Office Asst SEQ</td>
</tr>
<tr>
<td>060881</td>
<td>Stu-Student Asst SE1</td>
</tr>
</tbody>
</table>

### Set ID SHARE

**Job Code** (begins with) _empty_

**Description** (begins with) _empty_

**will show job codes 000005 thru 100xx**
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’

<table>
<thead>
<tr>
<th>Process Overview – TRACKING FORMS</th>
<th>Approvers &amp; Initiators can check the status of and track the approval routing of all the transactions s/he has submitted or approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I do this?</td>
<td>First Access Manager Self Service via WMU Login</td>
</tr>
</tbody>
</table>

**STEP 1**

A the Manager Self Service landing page, click on the ‘WMU Manager Tools’ tile

![Manager Self Service](image)

**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 transactions 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](image)
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

Find an Existing Value

Search Criteria

- Emp ID begins with
- Emp Title
- Transaction Date
- Effective Sequence
- Name begins with
- Last Name begins with
- Second Last Name begins with
- Alternate Character Name
- Middle Name
- Transaction ID
- Action
- Status Indicator

Click on any line to view specific transaction information

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

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Emp ID Record</th>
<th>Name</th>
<th>First Name</th>
<th>Last Name</th>
<th>Second Last Name</th>
<th>Alternate Character Name</th>
<th>Middle Name</th>
<th>Transaction Date</th>
<th>Effective Sequence</th>
<th>Transaction ID</th>
<th>Action</th>
<th>Status Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>08/21/2019</td>
<td>1</td>
<td>WNUI Job Data Change</td>
<td>Transfer</td>
<td>Denied</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>04/03/2019</td>
<td>5</td>
<td>WNUI Job Data Change</td>
<td>Transfer</td>
<td>Denied</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>09/03/2019</td>
<td>11</td>
<td>WNUI Job Data Change</td>
<td>Transfer</td>
<td>Denied</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>09/19/2019</td>
<td>16</td>
<td>WNUI Request Ad Hoc Salary Change</td>
<td>Transfer</td>
<td>Denied</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>09/16/2019</td>
<td>17</td>
<td>WNUI Update Job Details for Group</td>
<td>Data Change</td>
<td>In Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>09/17/2019</td>
<td>1</td>
<td>WNUI Update Job Details for Group</td>
<td>Data Change</td>
<td>Denied</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>05/20/2019</td>
<td>24</td>
<td>WNUI Job Data Change</td>
<td>Transfer</td>
<td>In Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>09/23/2019</td>
<td>1</td>
<td>WNUI Update Job Details for Group</td>
<td>Data Change</td>
<td>In Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409210 0</td>
<td>Cinda Rella Cinda Rella (blank) (blank) (blank)</td>
<td>09/24/2019</td>
<td>23</td>
<td>WNUI Job Data Change</td>
<td>Transfer</td>
<td>In Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on any line to view specific transaction information

Make sure you LOG OUT once you are done with reviewing the tracking status
<table>
<thead>
<tr>
<th>STEP 5</th>
<th>LOG OUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Click on the 3-Bars in the top right corner</td>
<td></td>
</tr>
<tr>
<td>• Once option box appears, click ‘Sign Out’</td>
<td></td>
</tr>
</tbody>
</table>

![Diagram showing navigation menu with 'Sign Out' highlighted]
**Manager Self Service (MSS) – Creating “Favorites”**

<table>
<thead>
<tr>
<th>Process Overview – CREATING A FAVORITE</th>
<th>You can save a page that you use often to the ‘Favorites’ as a shortcut.</th>
</tr>
</thead>
</table>

**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

![Manager Self Service](image1)

**STEP 2** The ‘Update Team Information Panel will appear. Click the ‘3 Bar’ icon at the top right corner

![Update Team Information Panel](image2)
<table>
<thead>
<tr>
<th>STEP 3</th>
<th>When the Options menu appears, click on ‘Add to Favorites’</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Options menu screenshot" /></td>
</tr>
<tr>
<td></td>
<td>Add to Favorites</td>
</tr>
</tbody>
</table>
| STEP 4 | A message will appear indicating you are adding this page ‘Update Team Information’ to your Favorites  
  • Click ‘OK’ |
|  | ![Message box screenshot](image) |
|  | Added 'Update Team Information' to Favorites  
  OK |
| 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 ①. This will open the NavBar options  
  • Click on ‘My Favorites’ ② |
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.

**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](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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Manager Self Service</th>
<th>Electronic Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRIMARY PURPOSE</strong></td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>INITIATION</strong></td>
<td>All supervisors automatically get Approver/Initiator access. Transactions are initiated by supervisors or their delegate.</td>
<td>Security role of &quot;Workflow Initiator&quot; must be requested and assigned, then employee may initiate workflow forms for any cost center.</td>
</tr>
<tr>
<td><strong>APPROVAL ROUTING</strong></td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>AUTOMATIC DATABASE UPDATE</strong></td>
<td>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.</td>
<td>Human Resources perform all updates to the database manually.</td>
</tr>
<tr>
<td><strong>DELEGATION</strong></td>
<td>Supervisors may delegate the authority to either initiate transactions or approve transactions.</td>
<td>No functionality exists; the workaround would be to make changes to workflow approval rule sets, requiring extensive paperwork and manual entry.</td>
</tr>
<tr>
<td><strong>HR’S ROLE</strong></td>
<td>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.</td>
<td>As workflow forms are received, processing staff manually enter data into job panels.</td>
</tr>
</tbody>
</table>

### Contact information

<table>
<thead>
<tr>
<th>Manager Self Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department</strong></td>
</tr>
<tr>
<td>Human Resources</td>
</tr>
<tr>
<td>Payroll &amp; Disbursements</td>
</tr>
<tr>
<td>Grants &amp; Contracts</td>
</tr>
<tr>
<td>Career &amp; Student Services</td>
</tr>
<tr>
<td>Graduate College</td>
</tr>
</tbody>
</table>