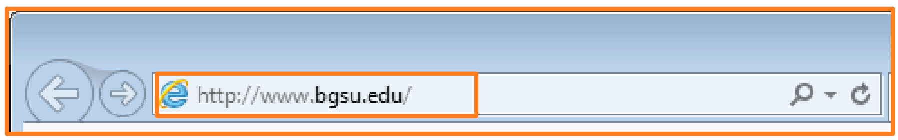
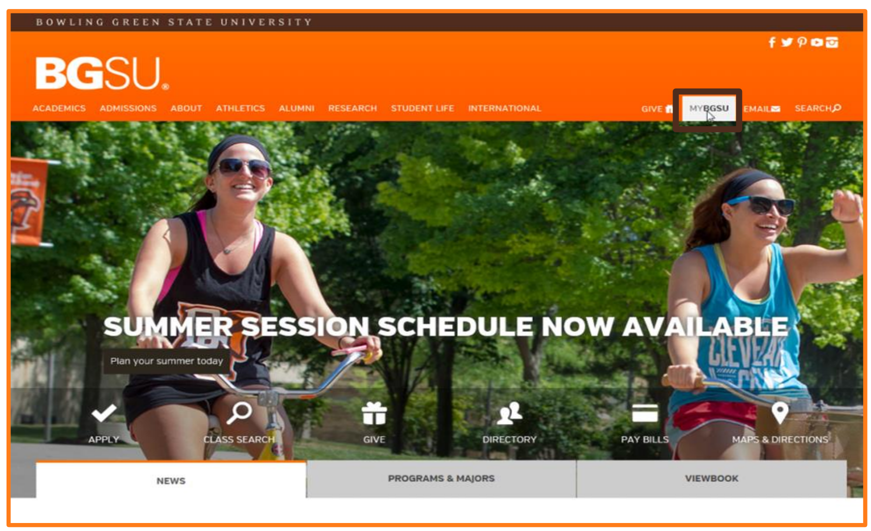
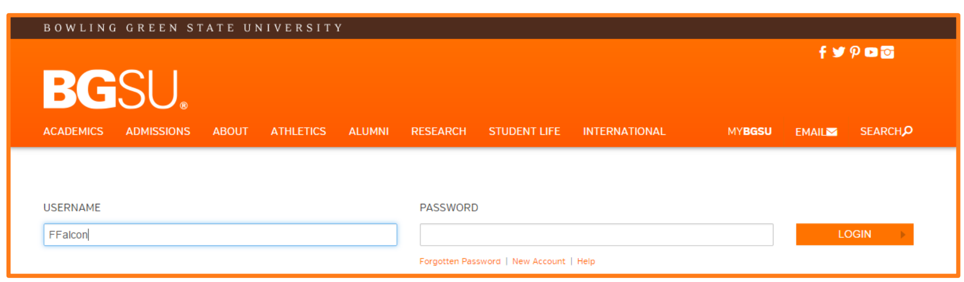
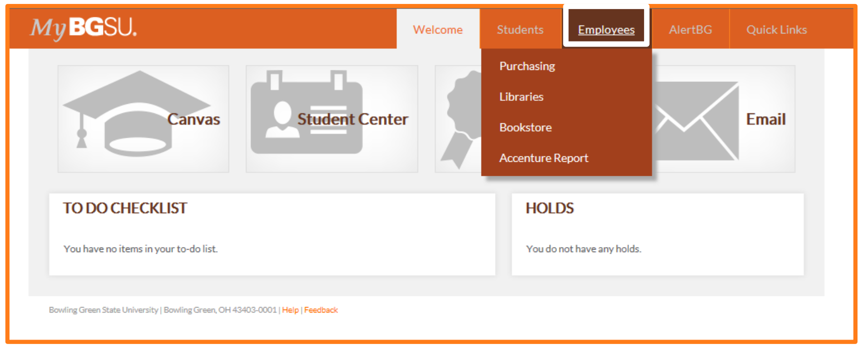
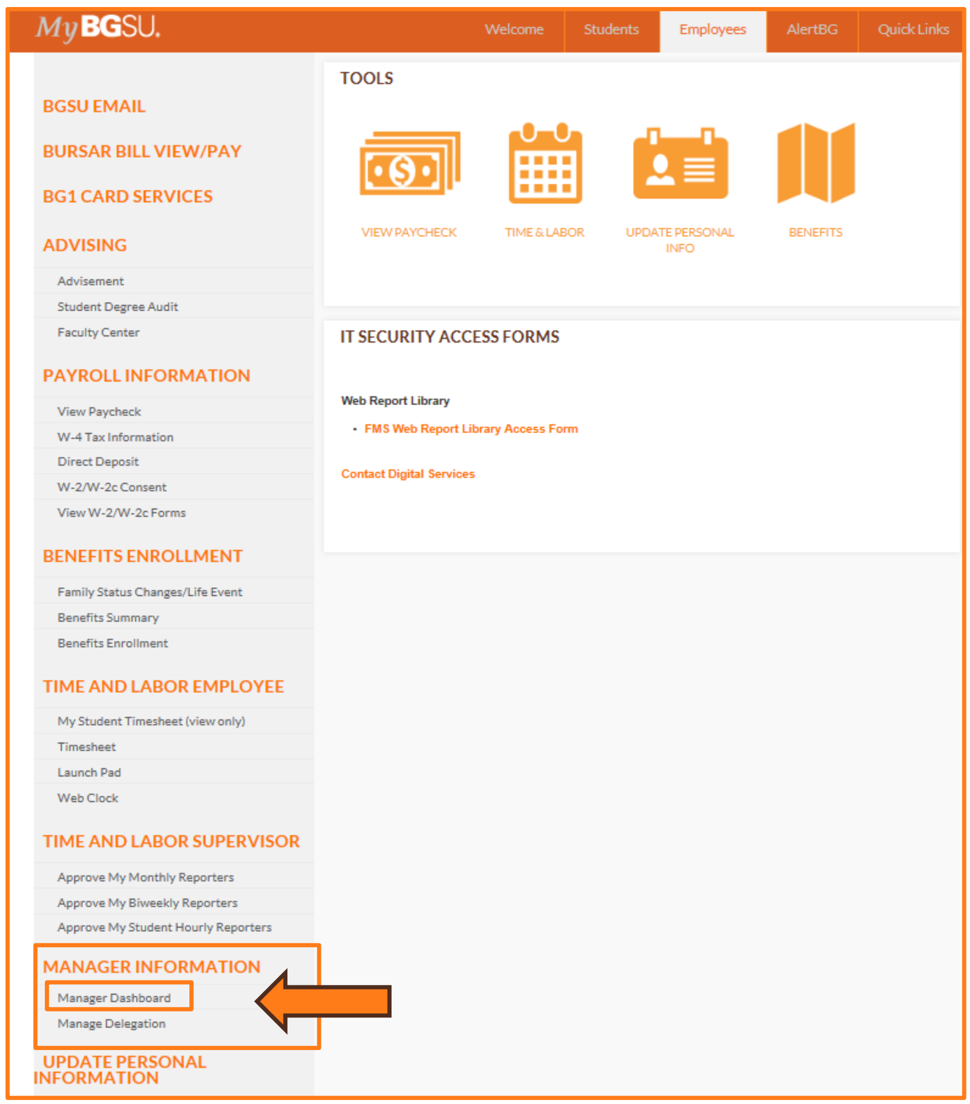
Manager Self Service (MSS) - Transactions

PROCESS OVERVIEW	The purpose of this reference guide is to provide instructions for Manager Self Service (MSS) Transactions; including Supervisor ID Change (All students and some staff), Termination, Retirement and Delegation activities. This document is set up according to the various tasks that may be performed when using Manager Self Service (MSS). 1. Begin at the **bgsu.edu** home page 2. Click **MyBGSU** 3. Enter **Username** and **Password** 4. Navigate: **Employees** > **Manager Information** > **Manager Dashboard** **5. Quick Links** **6. Choose appropriate transaction**
Where do I go?	MyBGSU > Employees > Manager Information > Manager Dashboard/Quick Links > Choose appropriate Transaction
SECTION I **NAVIGATION** Begin the process at the bgsu.edu home page. ***Note:** Please use Internet Explorer*	
Step 1: Click **MyBGSU**	
Step 2: Enter **USERNAME** and **PASSWORD** ***Note:** These will be your BGSU network credentials.* **Step 2a:** Click **Login**	

Manager Self Service (MSS) - Transactions

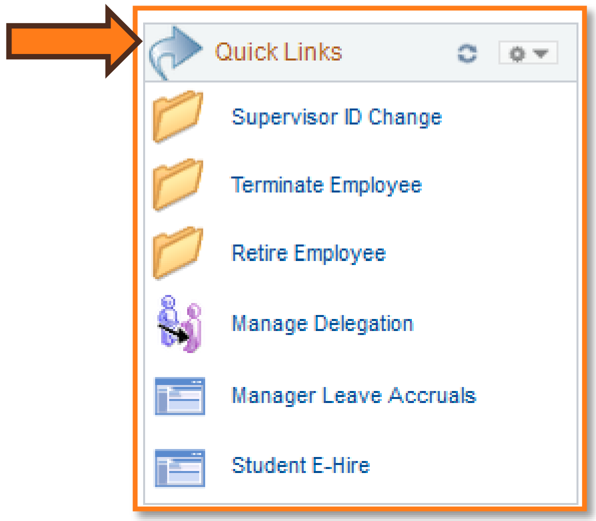
Step 3: Click **Employees**	
Step 4: Under Manager Information • Click **Manager Dashboard**	

Manager Self Service (MSS) - Transactions

SECTION II
QUICK LINKS

Quick Links enables the manager to quickly access Job actions that that can be performed on their employees.

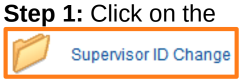
- Supervisor ID Change (all students and some staff)
- Terminate Employee
- Retire Employee
- Manage Delegation
- Student E-Hire

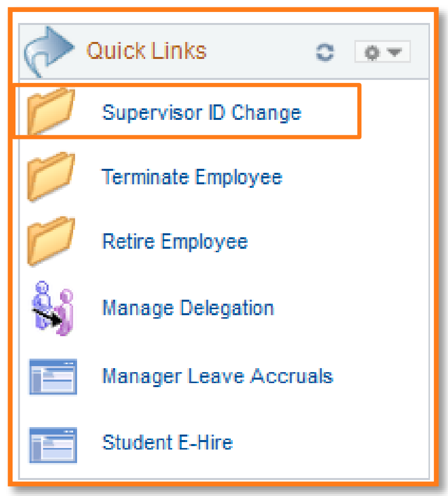


SECTION III
SUPERVISOR ID CHANGE

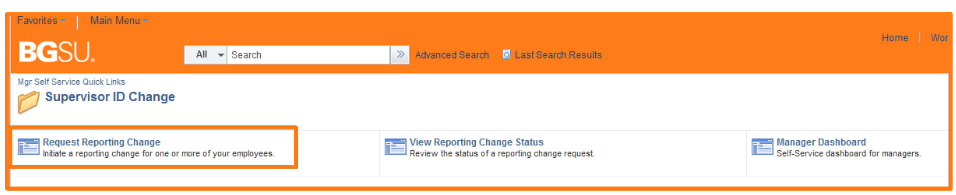
Managers and Student Supervisors will have the ability to transfer a student employee or possibly a faculty member from one supervisor to another.

Step 1: Click on the





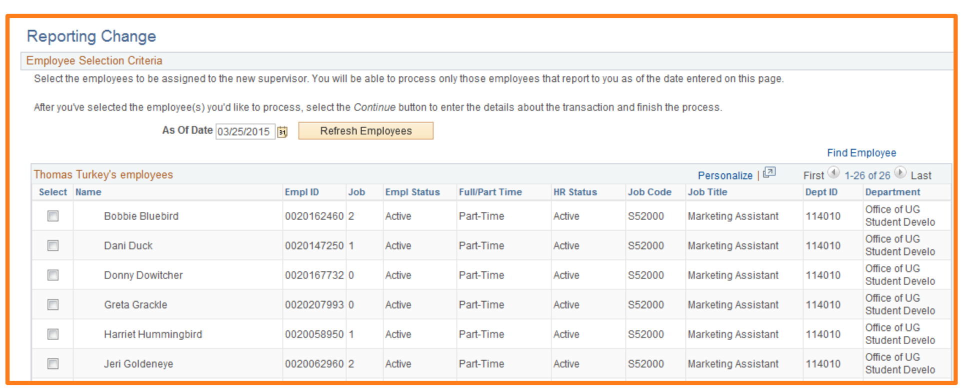
Step 2: Click **Request Reporting Change** hyperlink



Step 3: All of the Manager's Direct Reports will show **As of the Date** you enter.

Step 3a: To refresh the employees based on a different date,

1. Click
2. Select a new **date**
3. Click Refresh Employees



Reporting Change

Employee Selection Criteria

Select the employees to be assigned to the new supervisor. You will be able to process only those employees that report to you as of the date entered on this page.

After you've selected the employee(s) you'd like to process, select the *Continue* button to enter the details about the transaction and finish the process.

As Of Date 03/25/2015 Refresh Employees

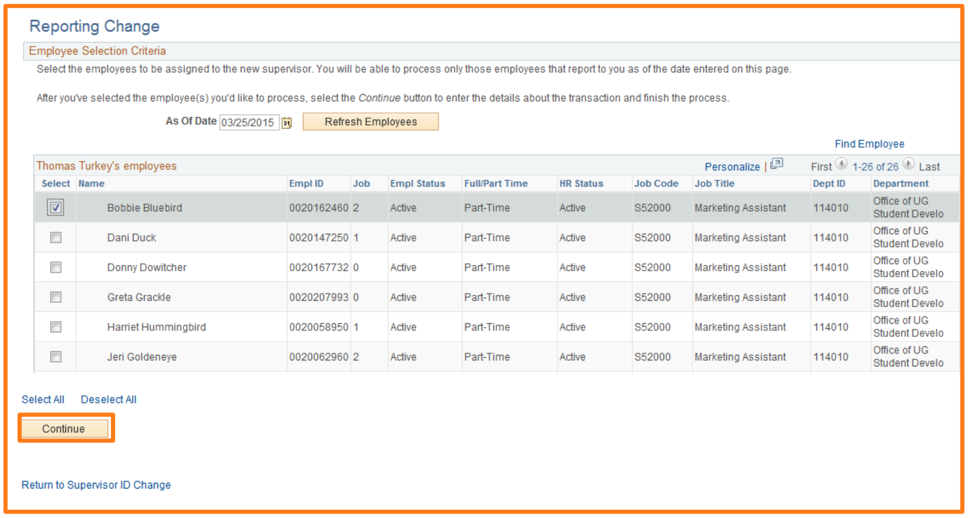
Find Employee

Thomas Turkey's employees — Personalize | First 1-26 of 26 Last

Select	Name	Empl ID	Job	Empl Status	Full/Part Time	HR Status	Job Code	Job Title	Dept ID	Department
	Bobbie Bluebird	0020162460	2	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo
	Dani Duck	0020147250	1	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo
	Donny Dowitcher	0020167732	0	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo
	Greta Grackle	0020207993	0	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo
	Harriet Hummingbird	0020058950	1	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo
	Jeri Goldeneye	0020062960	2	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo

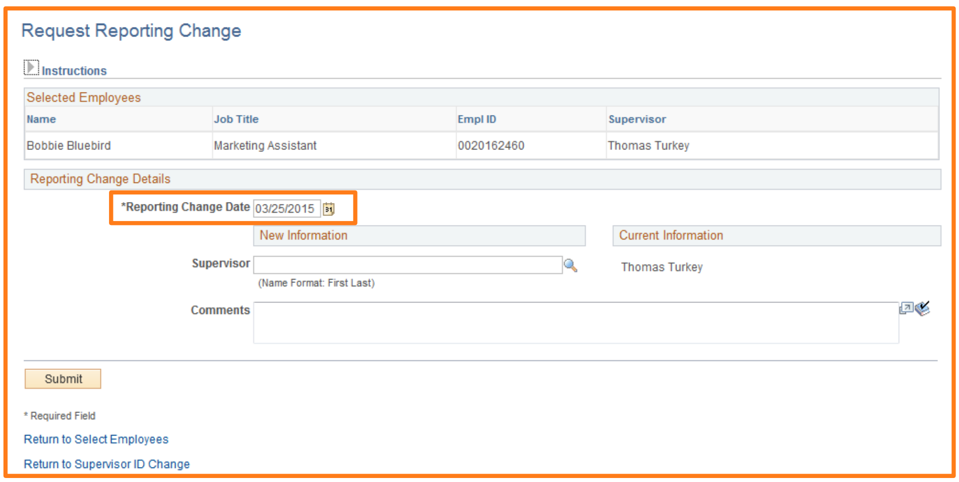
Step 4: Select the employee to be transferred to a new Supervisor.

Step 5: Click **Continue**



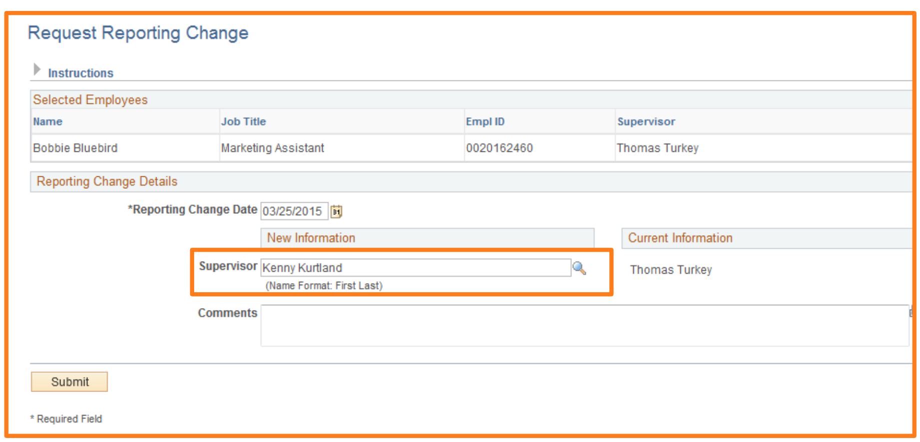
Step 6: The **Request Reporting Change page** appears.

Step 7: Select the **Reporting Change Date.**



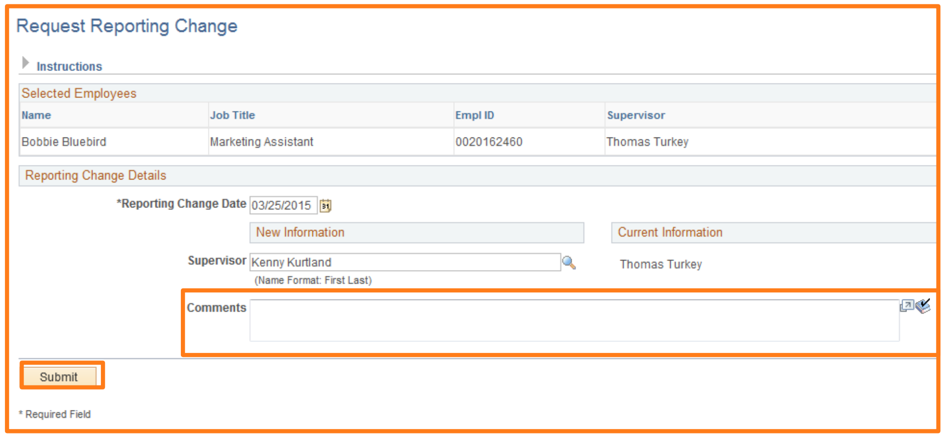
Step 8: Enter the **New Supervisor name.**

Use the  to perform a name search



Step 9: (Optional) Enter **Comments** if so desired.

Step 10: Click Submit

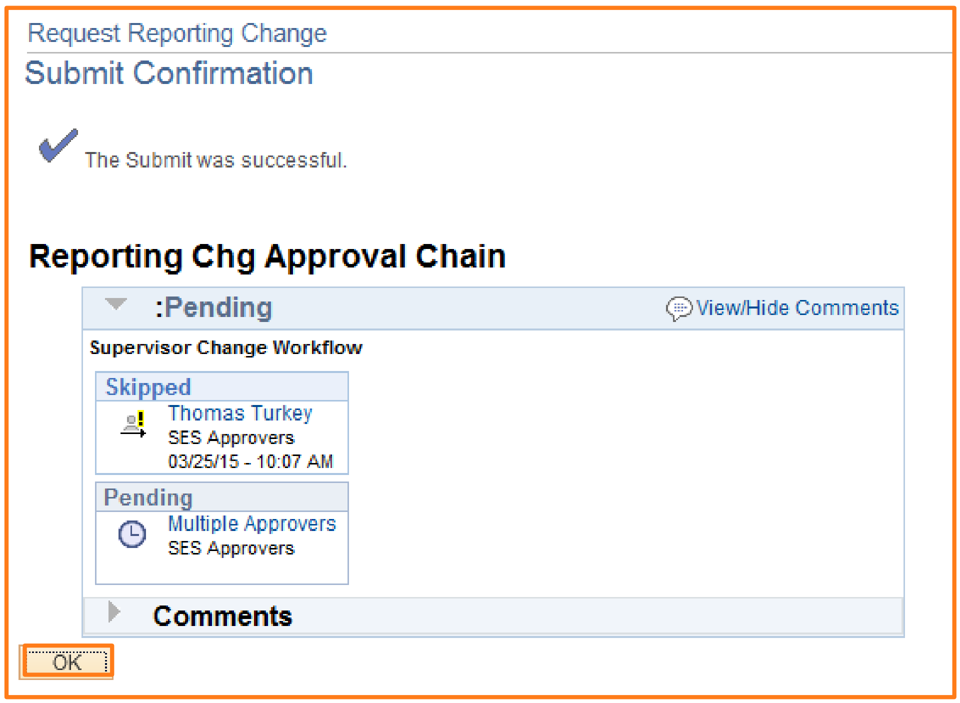


Step 11: The Submit Confirmation page will appear.

- Request for Supervisor ID Change was successfully submitted.
- Pending approvals will show

Note: Approvers are only HR or SES. Reviewers are managers with a vested interest in this transaction.

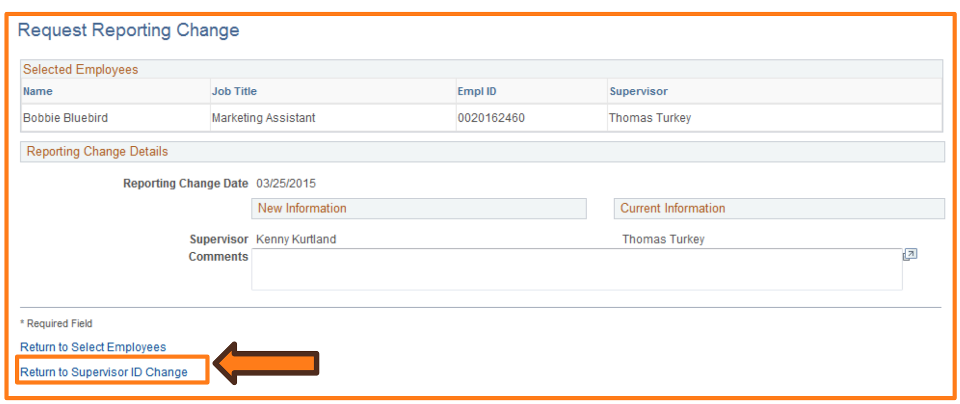
Step 12: Click OK



Step 13: Request Reporting Change page appears.

- This is a summary page Supervisor ID Change transaction.

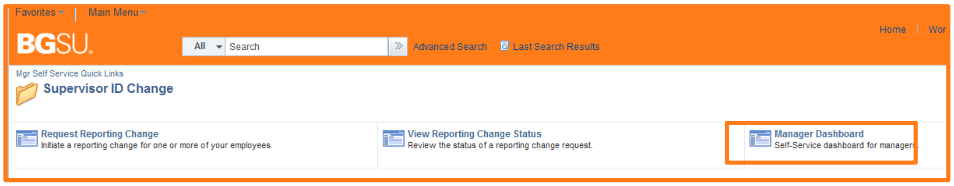
Step 14: Click Return to Supervisor ID Change hyperlink



Step 15: You are returned to the **Supervisor ID Change** menu.

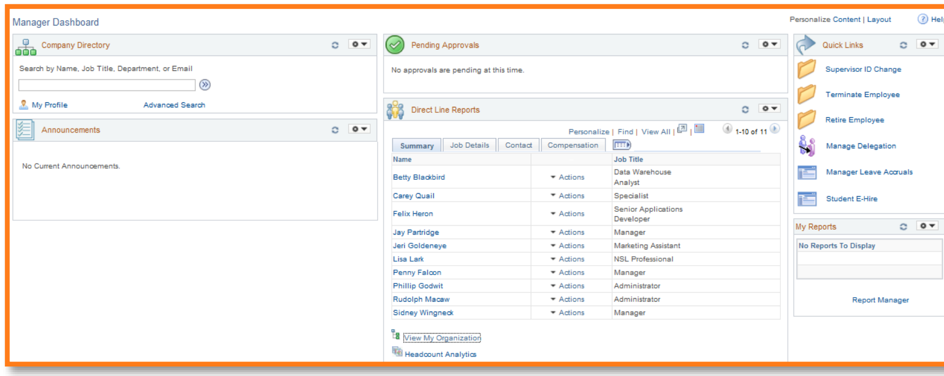
Step 16: Click

Manager Dashboard
Self-Service dashboard for managers.



Step 17: You are directed back to the **Manager Dashboard.**

You have successfully completed the Supervisor ID Change transaction.



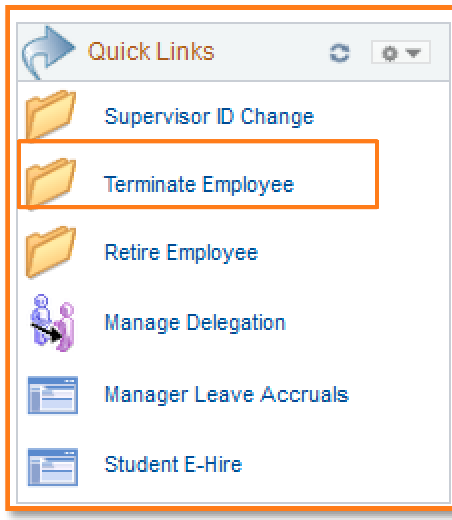
SECTION IV
TERMINATE EMPLOYEE

Managers will have the capability to terminate their direct reports.

Note: This is a notification process only. *All approvals are done outside of the system, but need to go through the notification process here in PeopleSoft.*

Step 1: Click on the

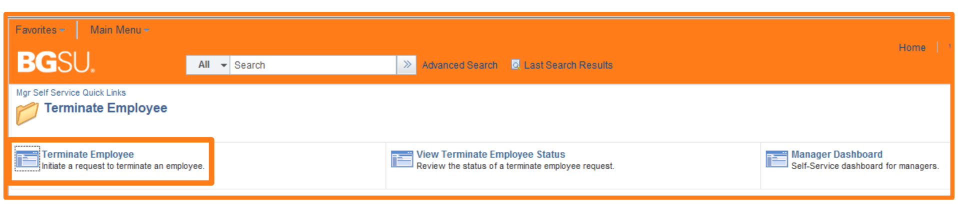
Terminate Employee



Step 2: Click

Terminate Employee

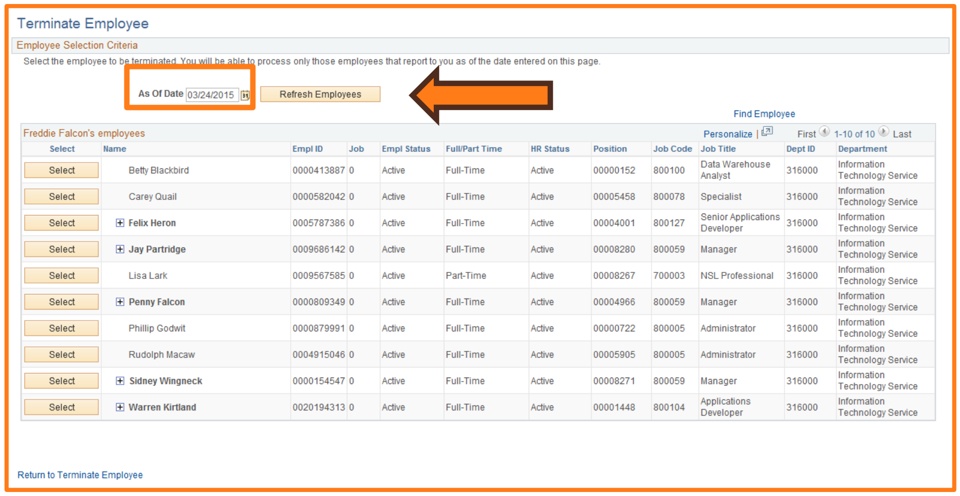
hyperlink



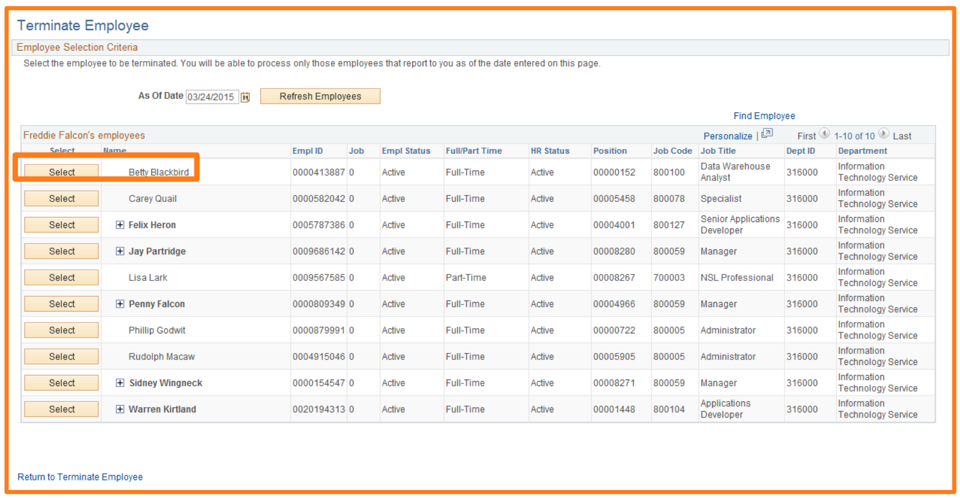
Step 3: All of the Manager's Direct Reports will show **As of the Date** you enter.

Step 3a: To refresh the employees based on a different date,

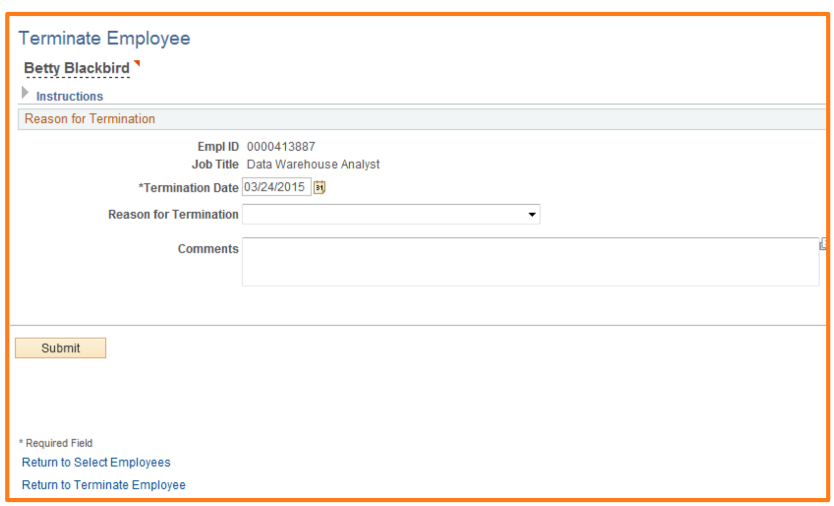
4. Click 
5. Choose a new **date**
6. Click Refresh Employees



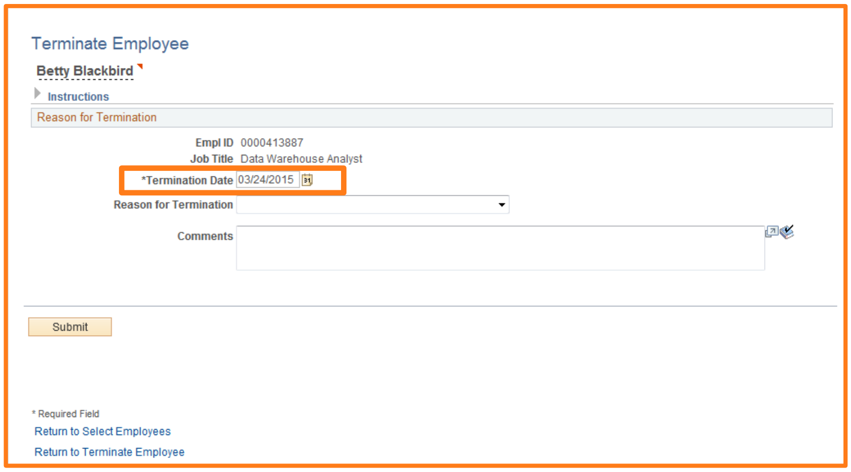
Step 4: Click Select next to the employee to be terminated.



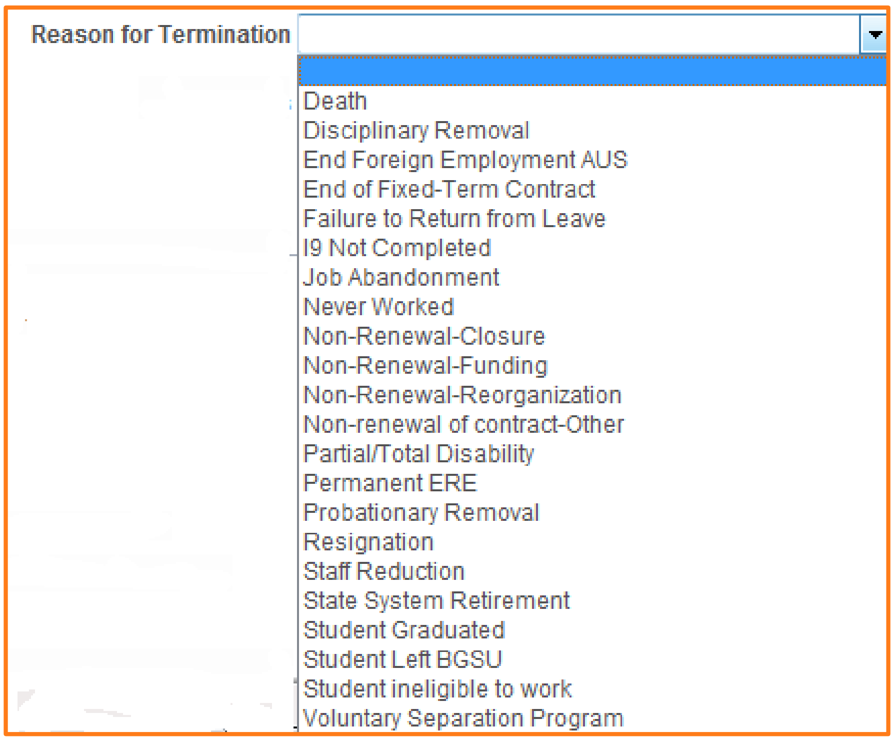
Step 5: The Terminate Employee page appears.



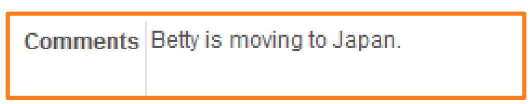
Step 6: Select the **Termination Date**, this should be the first day they are no longer employed.



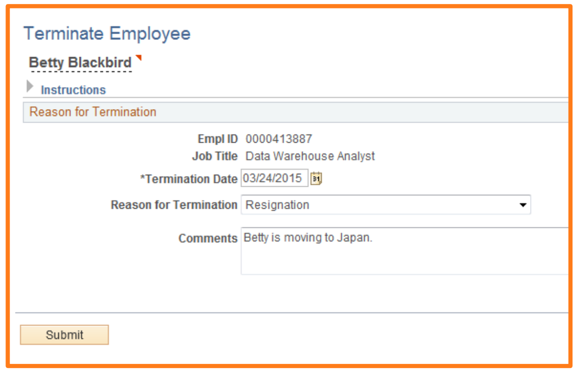
Step 7: Choose a **Reason for Termination** from the drop down list.



Step 8: (Optional) Enter in Comments about the employee's termination if desired.



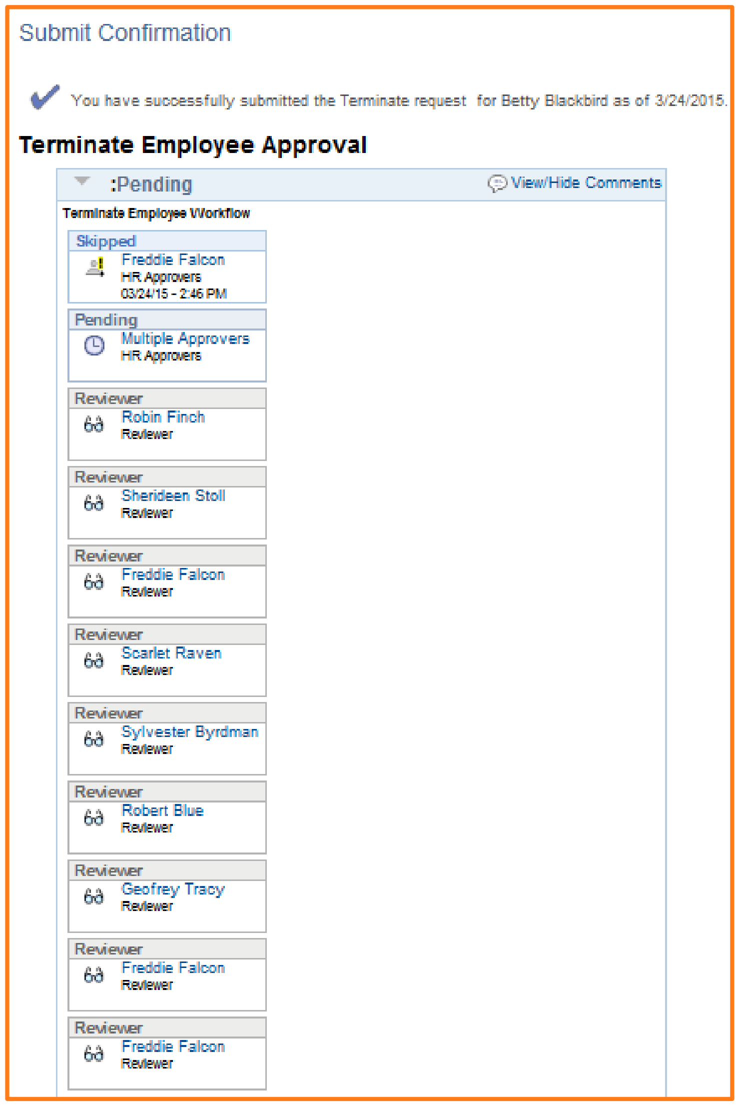
Step 9: Click 



Step 10: A **Submit Confirmation** along with The **Terminate Employee Approval** will appear.

The ***notification process*** is now in progress.

- The termination notification will be sent to the requestor, the budget administrators for the department as well as the immediate supervisor and up the reporting chain stopping at the cabinet level.
- Approvers will be HR for staff and Student Employment Services for students

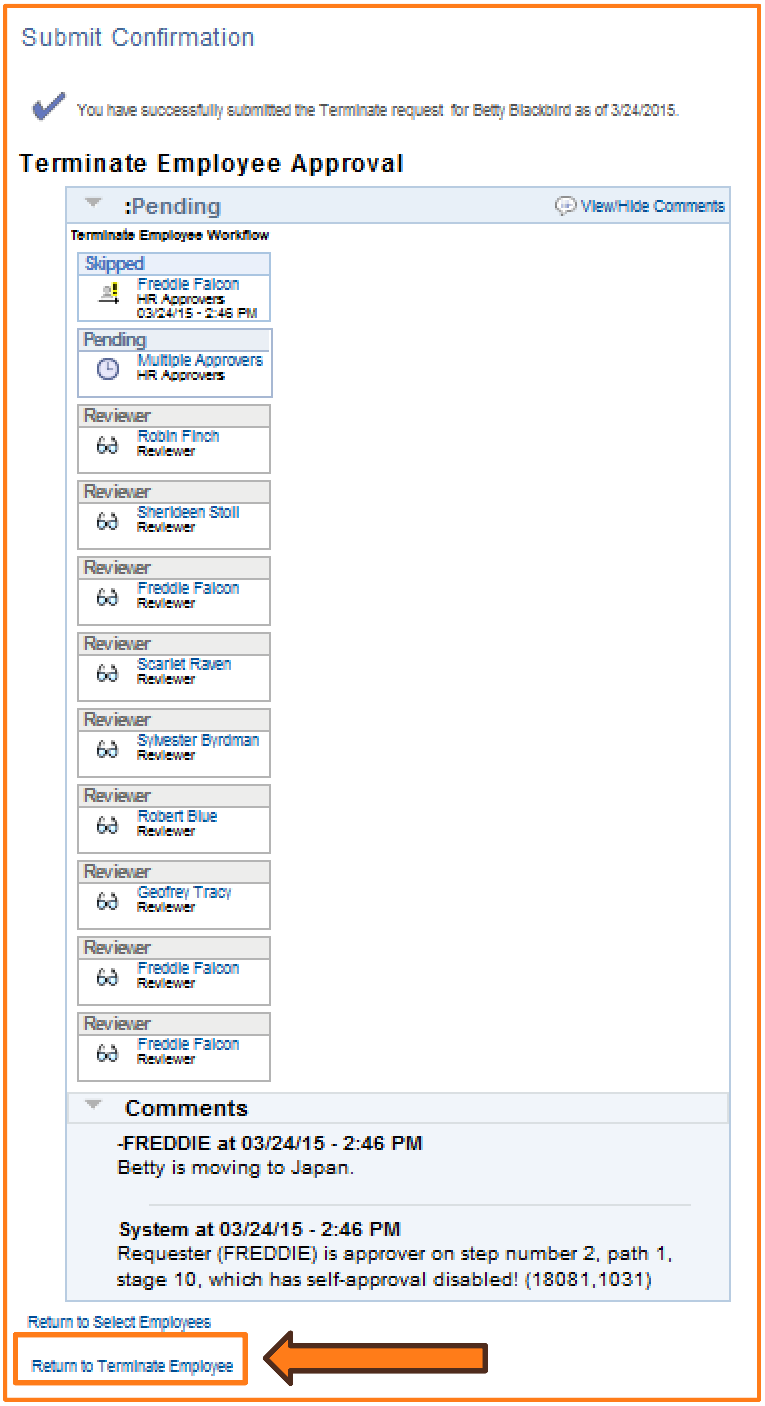


Step 11: Click on the

Return to Terminate Employee

hyperlink

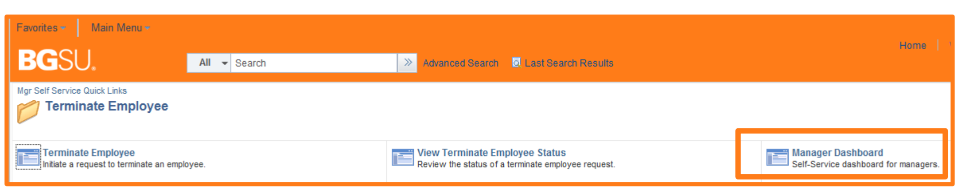
You have successfully entered an employee's termination transaction.



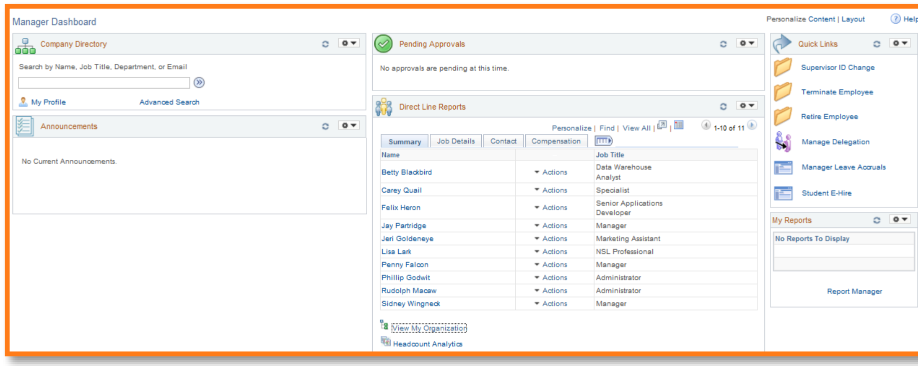
Step 12: You will be directed back to the **Terminate Employee** menu.

Step 13: Click

Manager Dashboard
Self-Service dashboard for managers.



Step 14: You will be returned to the **Manager Dashboard**

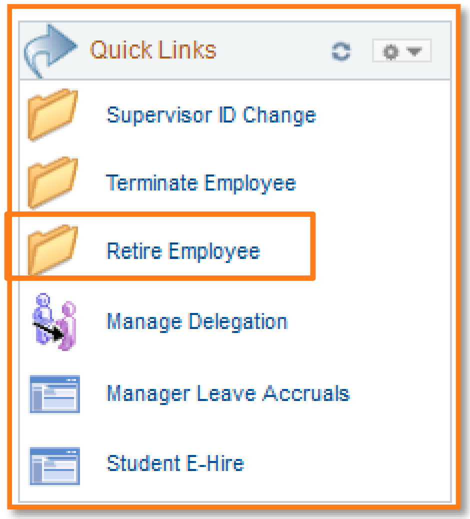


SECTION V
RETIRE EMPLOYEE

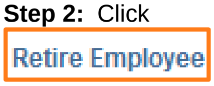
Managers will have the capability to retire their direct reports.

***Note: This is a notification process only.** All approvals are done outside of the system, but need to go through the notification process here in PeopleSoft.*

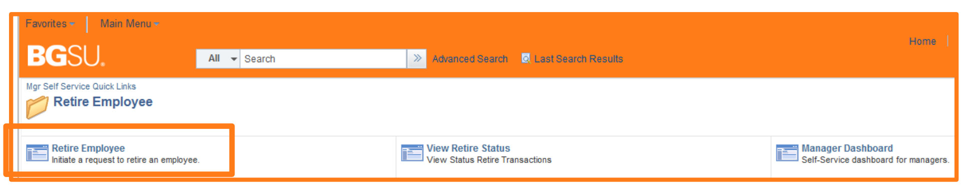
Step 1: Click



Step 2: Click



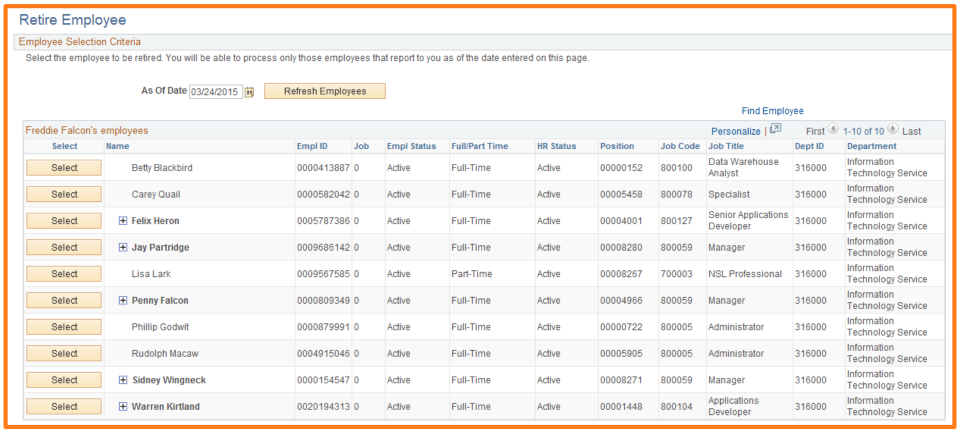
hyperlink



Step 3: All of the Manager's Direct Reports will show **As of the Date** you enter.

Step 3a: To refresh the employees based on a different date,

1. Click
2. Choose a new **date**
3. Click Refresh Employees



Retire Employee

Employee Selection Criteria

Select the employee to be retired. You will be able to process only those employees that report to you as of the date entered on this page.

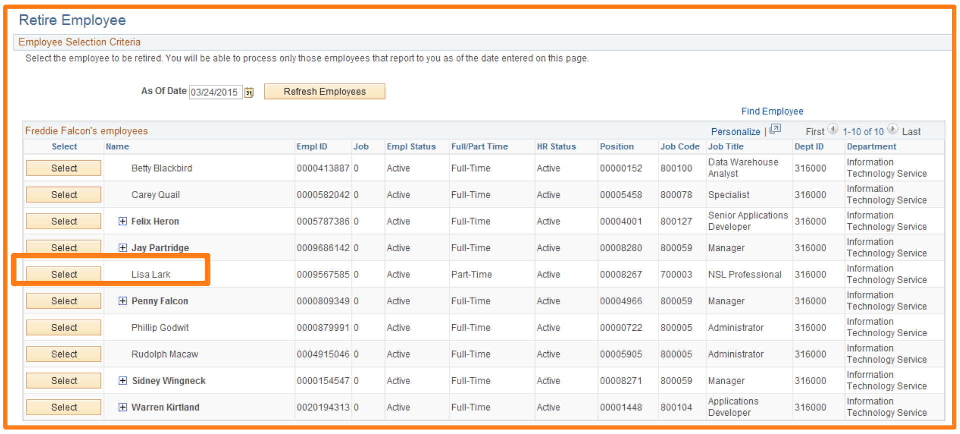
As Of Date 03/24/2015 Refresh Employees

Find Employee

Freddie Falcon's employees — Personalize | First 1-10 of 10 Last

Select	Name	Empl ID	Job	Empl Status	Full/Part Time	HR Status	Position	Job Code	Job Title	Dept ID	Department
Select	Betty Blackbird	0000413887	0	Active	Full-Time	Active	00000152	800100	Data Warehouse Analyst	316000	Information Technology Service
Select	Carey Quail	0000582042	0	Active	Full-Time	Active	00005458	800078	Specialist	316000	Information Technology Service
Select	Felix Heron	0005787386	0	Active	Full-Time	Active	00004001	800127	Senior Applications Developer	316000	Information Technology Service
Select	Jay Partridge	0009686142	0	Active	Full-Time	Active	00008280	800059	Manager	316000	Information Technology Service
Select	Lisa Lark	0009567585	0	Active	Part-Time	Active	00008267	700003	NSL Professional	316000	Information Technology Service
Select	Penny Falcon	0000809349	0	Active	Full-Time	Active	00004966	800059	Manager	316000	Information Technology Service
Select	Phillip Godwit	0000879991	0	Active	Full-Time	Active	00000722	800005	Administrator	316000	Information Technology Service
Select	Rudolph Macaw	0004915046	0	Active	Full-Time	Active	00005905	800005	Administrator	316000	Information Technology Service
Select	Sidney Wingneck	0000154547	0	Active	Full-Time	Active	00008271	800059	Manager	316000	Information Technology Service
Select	Warren Kirtland	0020194313	0	Active	Full-Time	Active	00001448	800104	Applications Developer	316000	Information Technology Service

Step 4: Click Select next to the employee to be retired.



Retire Employee

Employee Selection Criteria

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As Of Date 03/24/2015 Refresh Employees

Find Employee

Freddie Falcon's employees — Personalize | First 1-10 of 10 Last

Select	Name	Empl ID	Job	Empl Status	Full/Part Time	HR Status	Position	Job Code	Job Title	Dept ID	Department
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Select	Carey Quail	0000582042	0	Active	Full-Time	Active	00005458	800078	Specialist	316000	Information Technology Service
Select	Felix Heron	0005787386	0	Active	Full-Time	Active	00004001	800127	Senior Applications Developer	316000	Information Technology Service
Select	Jay Partridge	0009686142	0	Active	Full-Time	Active	00008280	800059	Manager	316000	Information Technology Service
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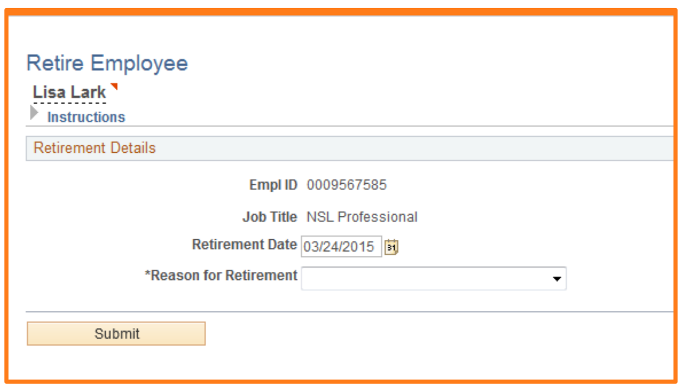
Select	Penny Falcon	0000809349	0	Active	Full-Time	Active	00004966	800059	Manager	316000	Information Technology Service
Select	Phillip Godwit	0000879991	0	Active	Full-Time	Active	00000722	800005	Administrator	316000	Information Technology Service
Select	Rudolph Macaw	0004915046	0	Active	Full-Time	Active	00005905	800005	Administrator	316000	Information Technology Service
Select	Sidney Wingneck	0000154547	0	Active	Full-Time	Active	00008271	800059	Manager	316000	Information Technology Service
Select	Warren Kirtland	0020194313	0	Active	Full-Time	Active	00001448	800104	Applications Developer	316000	Information Technology Service

Step 5: The Retire Employee page appears.



Retire Employee

Lisa Lark

Instructions

Retirement Details

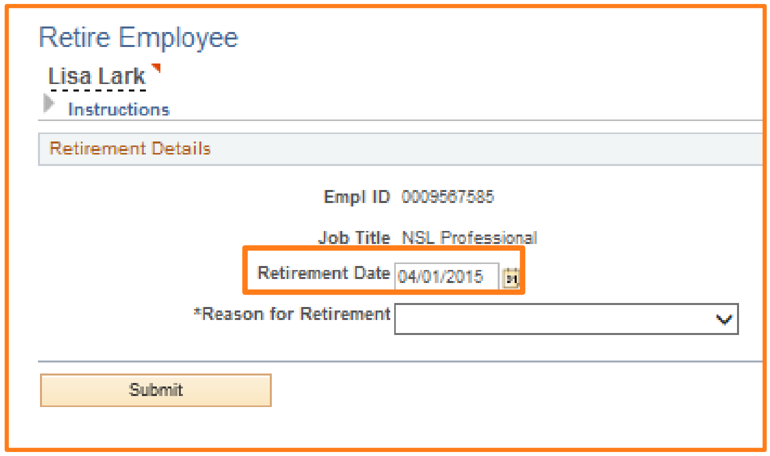
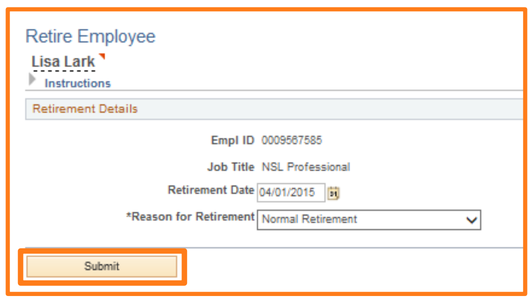
Empl ID 0009567585

Job Title NSL Professional

Retirement Date 03/24/2015

*Reason for Retirement

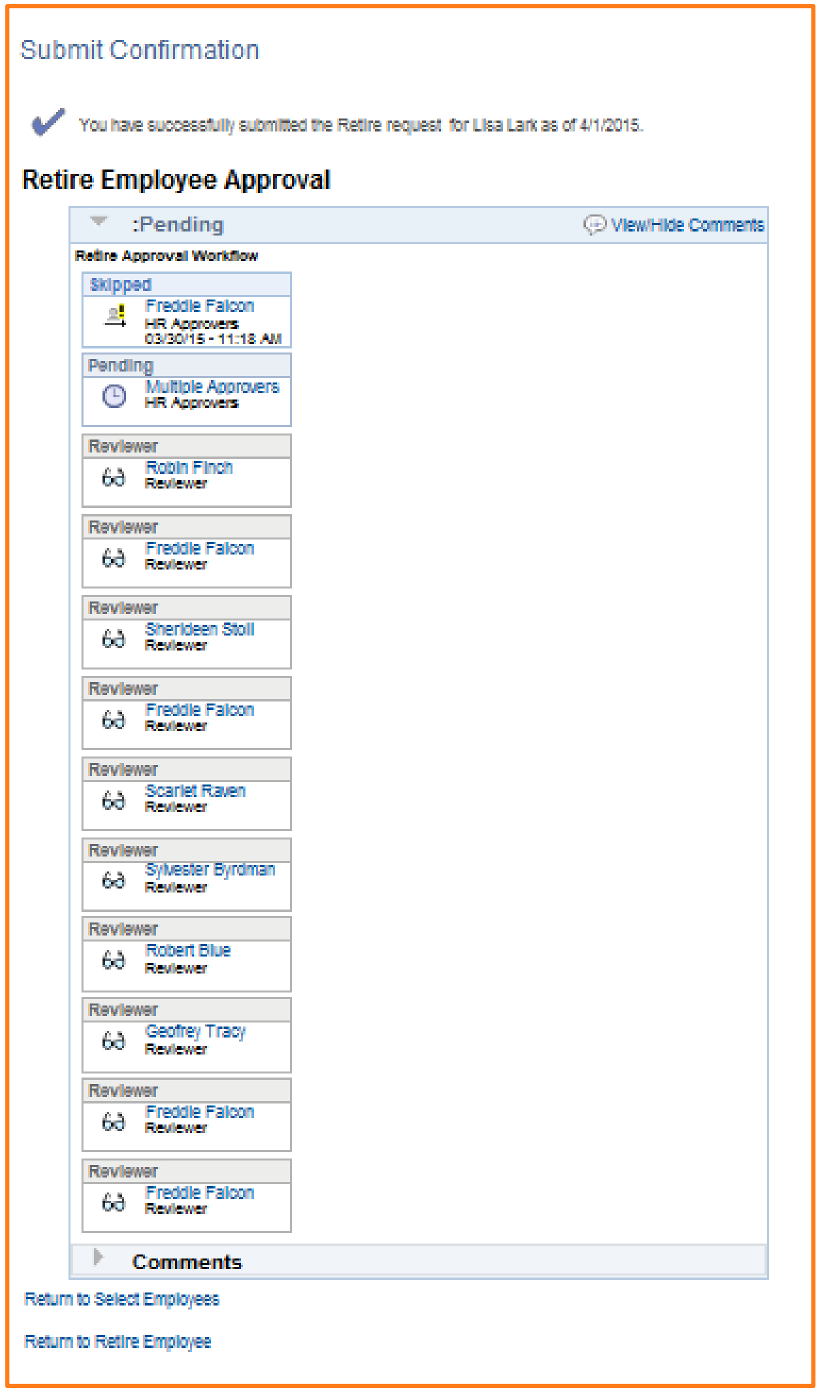
Submit

Step 6: Select the **Retirement Date**, this should be first of the month following the retirement.	
Step 7: Select a **Reason for Retirement** from the drop down.	
Step 8: Click 	

Step 9: A **Submit Confirmation** along with The **Retire Employee Approval** will appear.

The ***notification process*** is now in progress.

- The retirement notification will be sent to the requestor, the budget administrators for the department as well as the immediate supervisor and up the reporting chain stopping at the cabinet level.
- Approvers will be HR

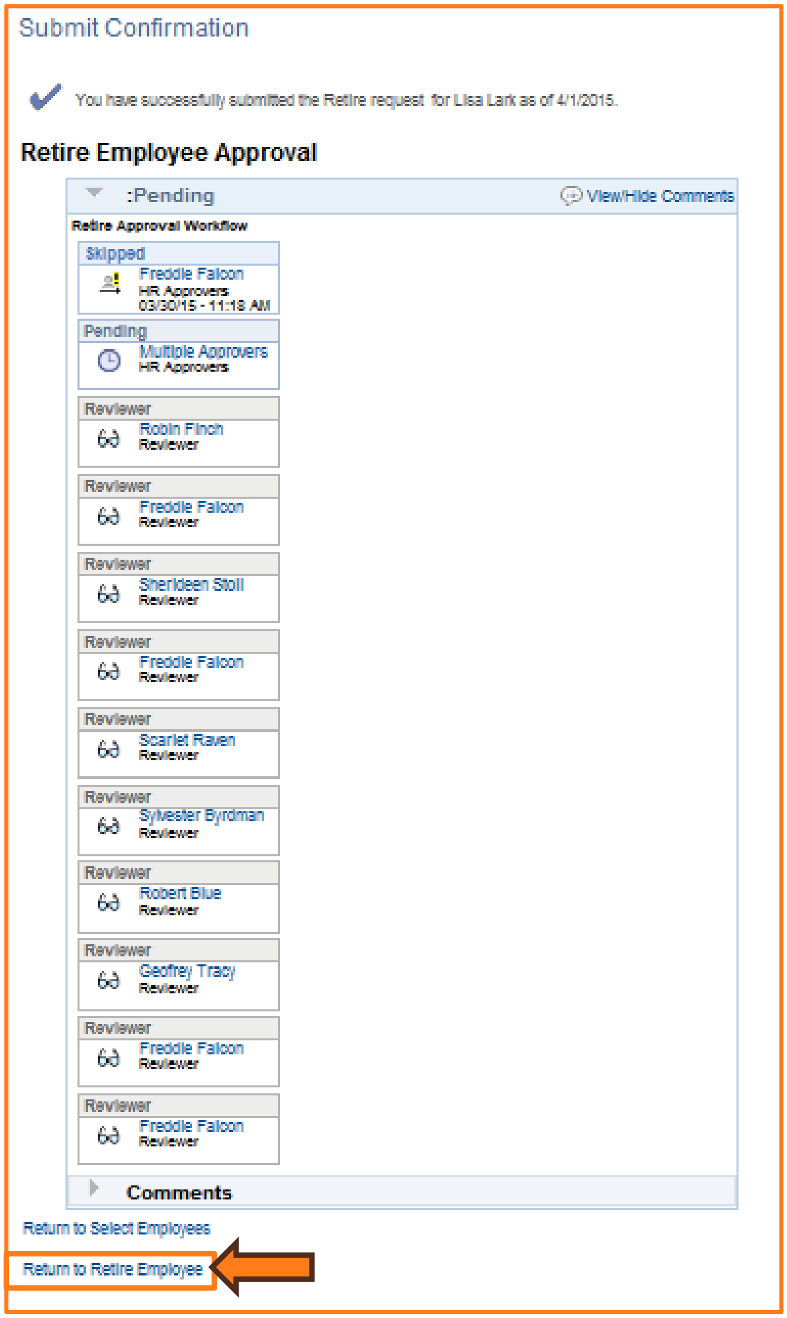


Step 11: Click on the

Return to Retire Employee

hyperlink

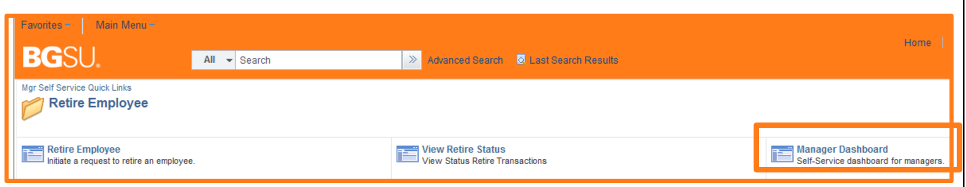
You have successfully entered an employee's retirement transaction.



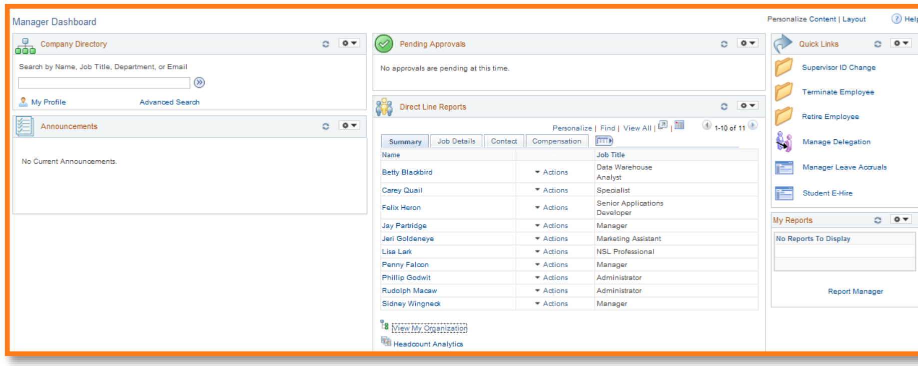
Step 12: You will be directed back to the **Retire Employee** menu.

Step 13: Click

Manager Dashboard
Self-Service dashboard for managers.



Step 14: You will be returned to the **Manager Dashboard**

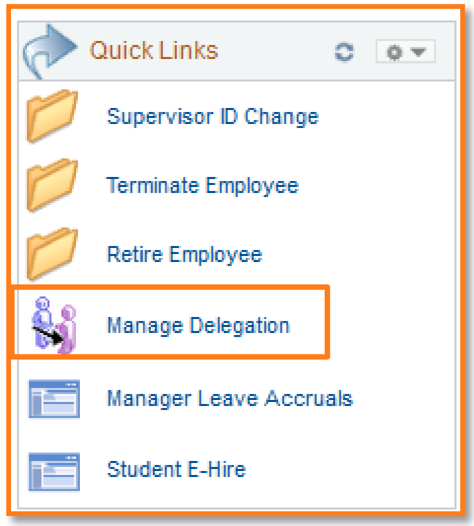


SECTION VI
MANAGE DELEGATION

Quick Links allows the option to delegate self-service transactions while you are out of the office.

Step 1: Click

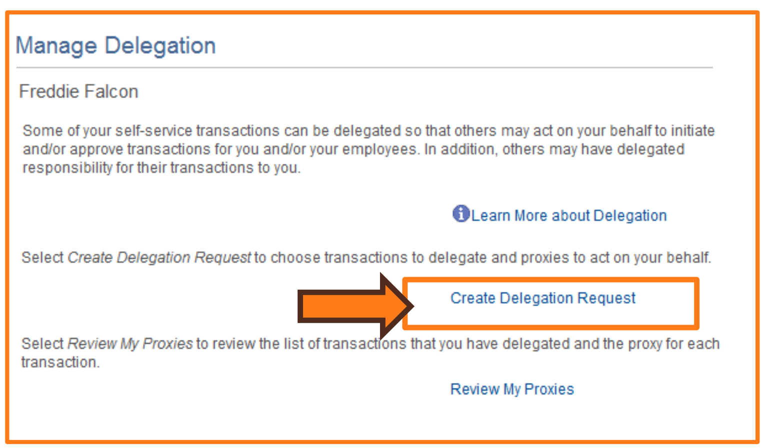
Manage Delegation



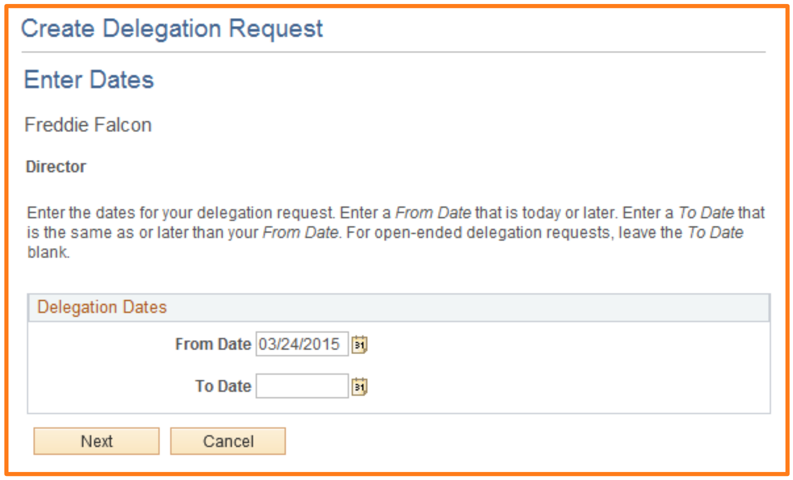
Step 2: The **Manage Delegation page appears.**

Step3: Click

Create Delegation Request

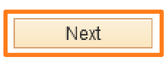


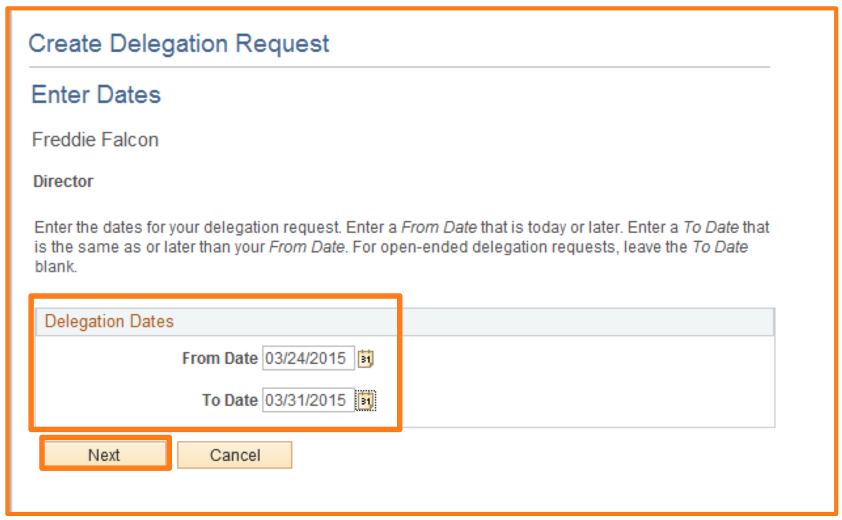
Step 4: You are directed to the **Create Delegation Request** page.



Step 5: Enter the **Delegation Dates**

- Enter the date you wish the delegation to start. **(From Date)**
- Enter the date the delegation period will end. **(To Date)**

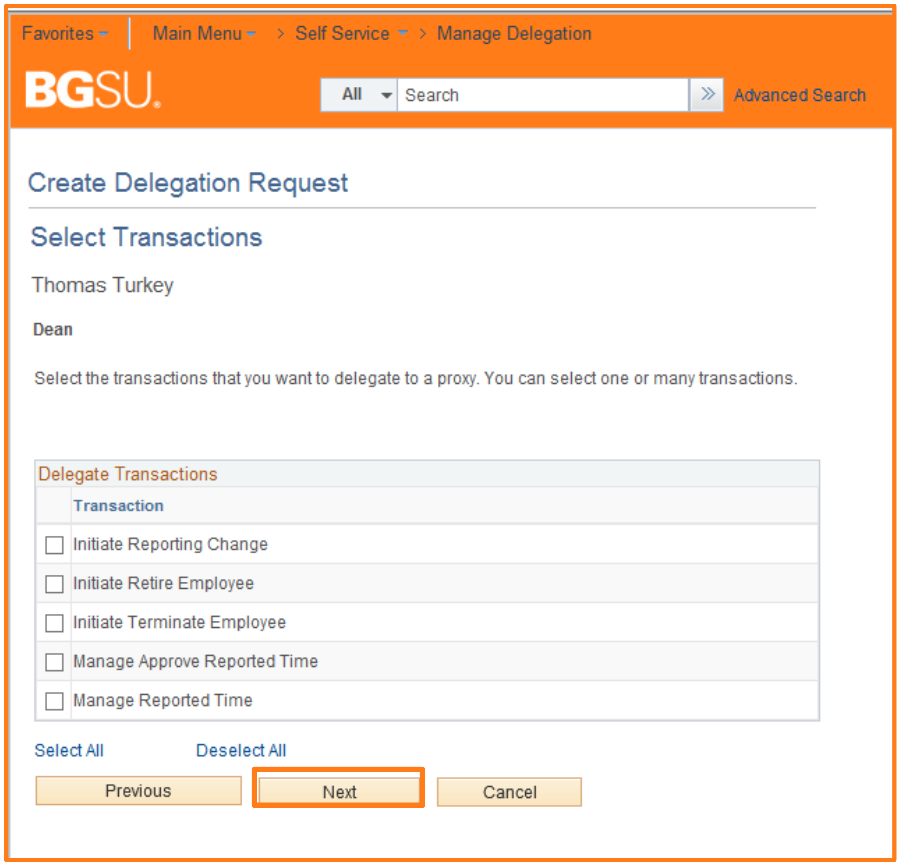
Step 5: Click 



Step 6: Choose the self-service transaction you want to delegate.

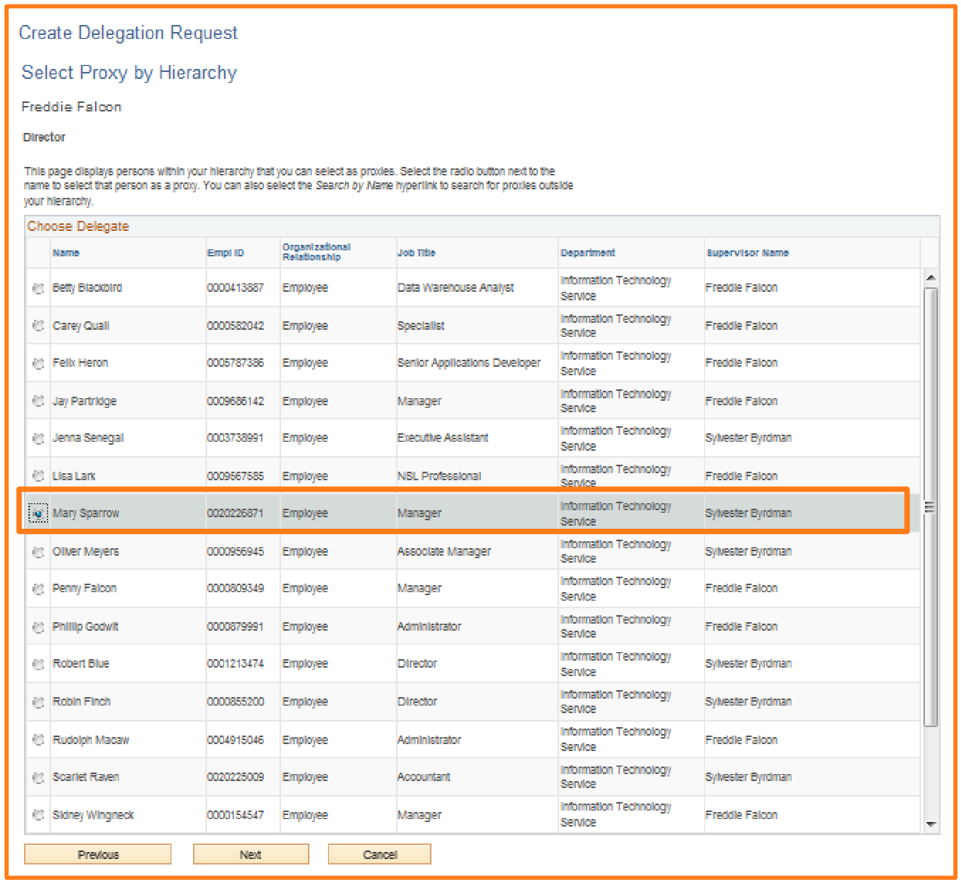
- Place a ☑ in the box next to the transaction the delegate is allowed to perform.

Step 7: Click Next



Step 8: Choose the employee that will be the Delegate.

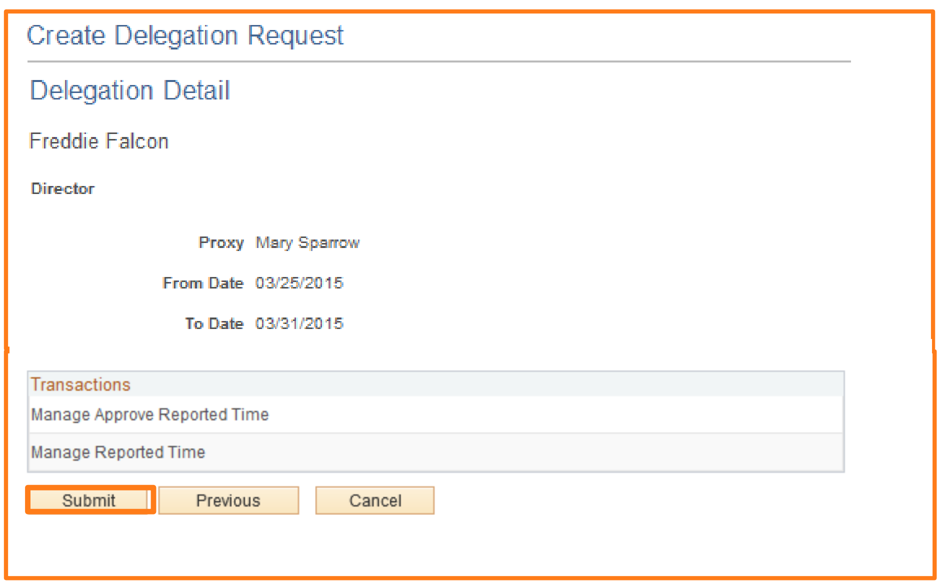
Step 9: Click Next



Step 10: The **Delegation Detail** page will appear. The summary page lists:

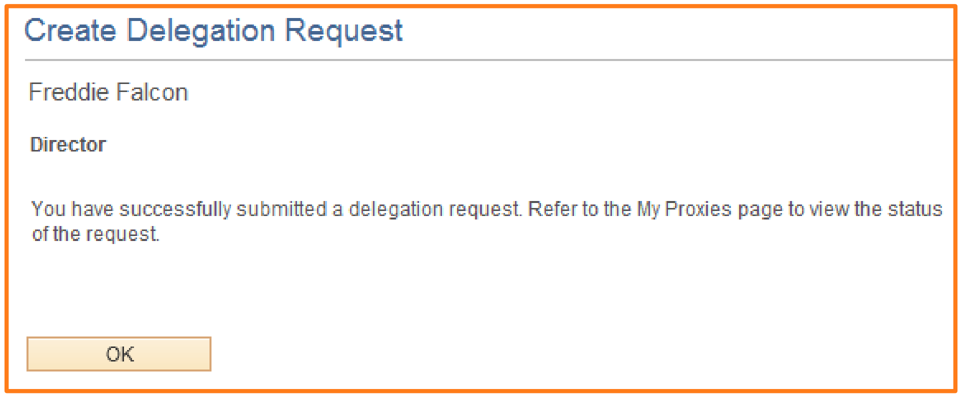
- Proxy – the Delegate
- Start Date of Delegation
- End Date of Delegation
- Transaction listing of what the Proxy will be able to perform.

Step 11: Click Submit



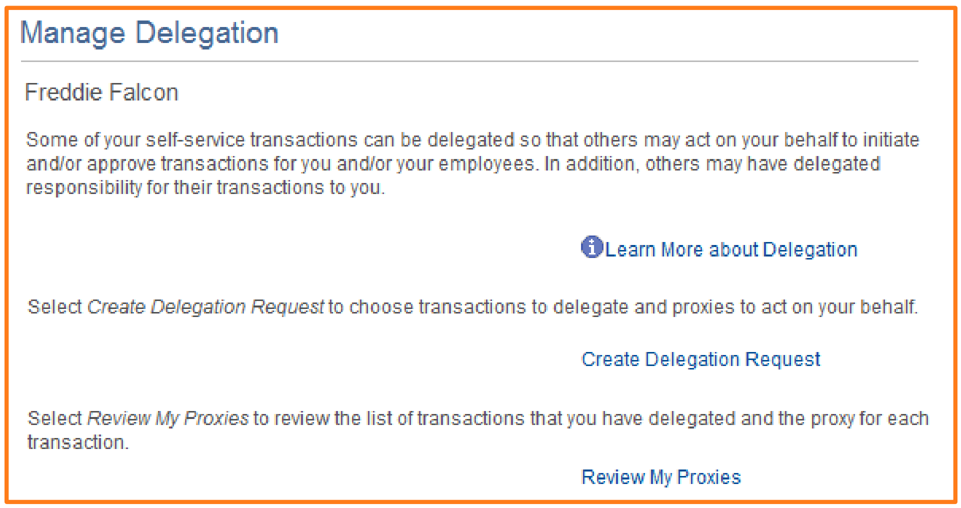
Step 12: The **Create Delegation Request** page appears.

Step 13: Click OK



Step 14: You will be directed back to the **Manage Delegation** page.

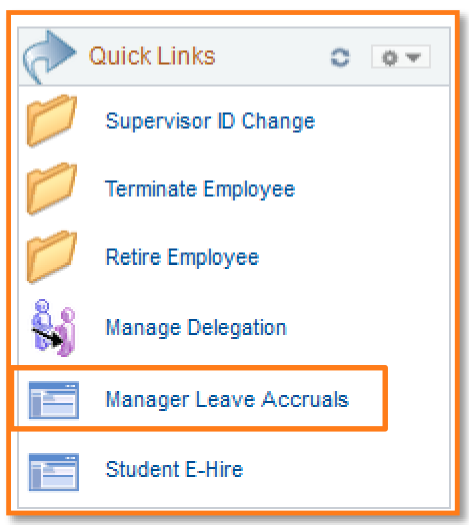
You have successfully created a Delegate.



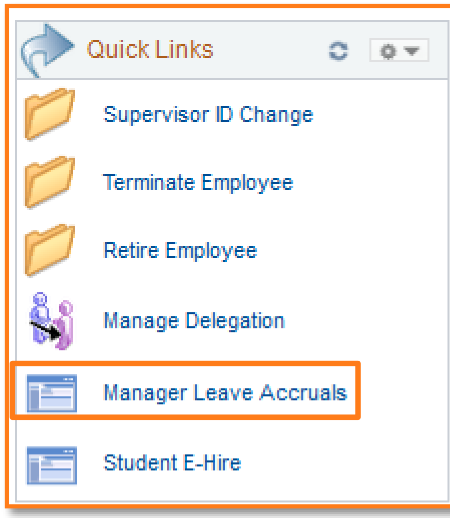
SECTION VII
MANAGER LEAVE ACCRUALS

Managers have the capability to review their direct reports Leave Accrual balances.

- The Quick Link directs you to balances as of the last confirmed payroll.
- You may also view up to date leave balances for your direct reports through time and labor.



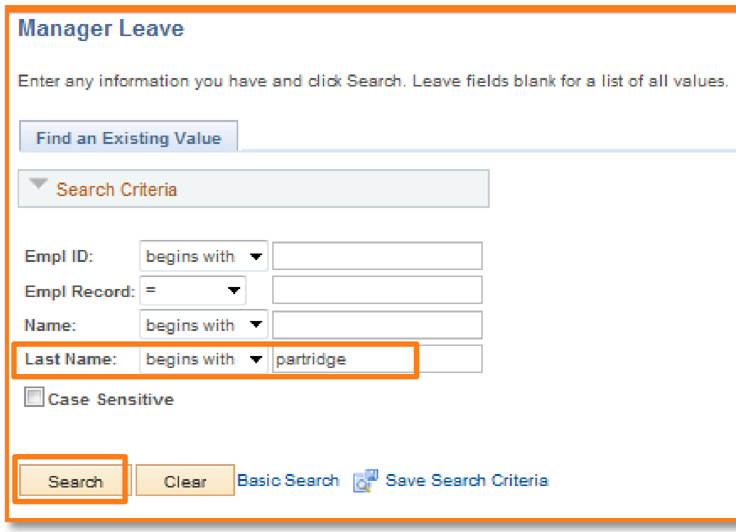
Step 1: Click



Step 2: Enter the Search criteria

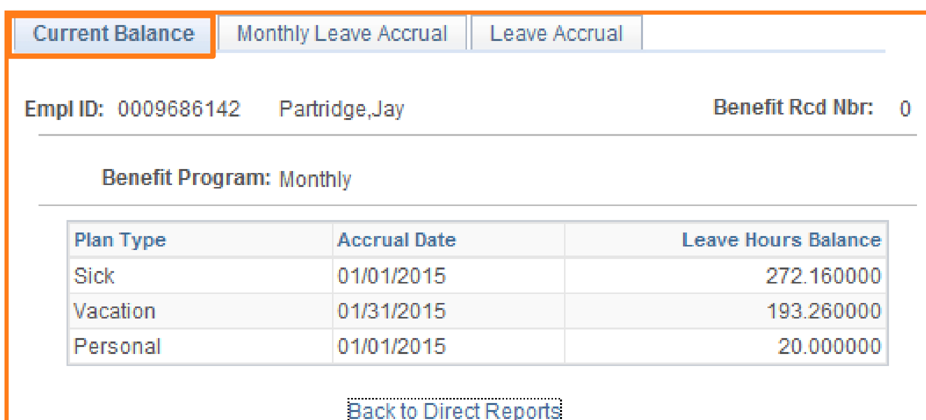
(e.g. Partridge/Last Name)

Step 3: Click



Step 4: Current Balances appear

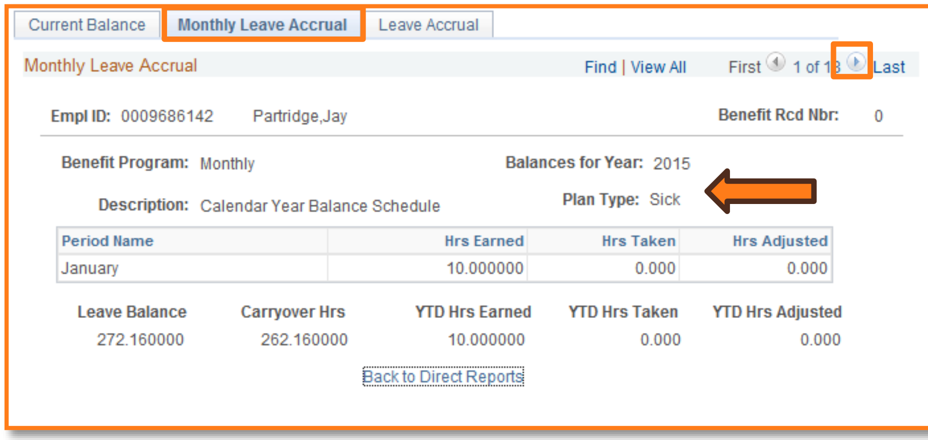
Review Sick, Vacation and Personal balances



Step 5: Click Monthly Leave Accrual **Tab**

Step 6: Review Leave Balances for the Month, Hours Earned, Hours Taken and Hours Adjusted

- **Click** ▷ **to move to the next Plan Type**



Step 7: Click Leave Accrual **tab**

Step 8: Review Monthly Accrual Date, Service Hours, Hours Earned, Hours Taken and Hours Adjusted

- **Click** ▷ **to move to the next Plan Type**

Step 9: Click Back to Direct Reports

You will be returned to the direct reports leave balances page.