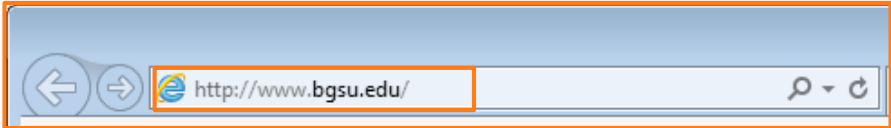
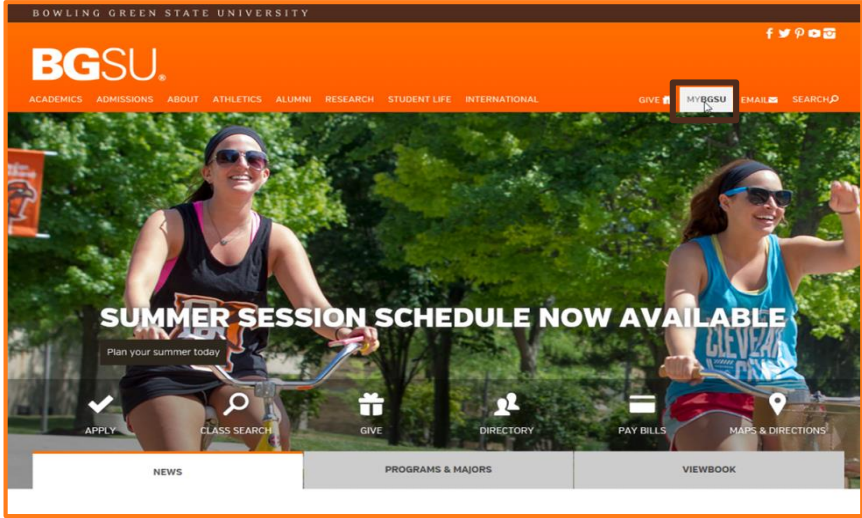
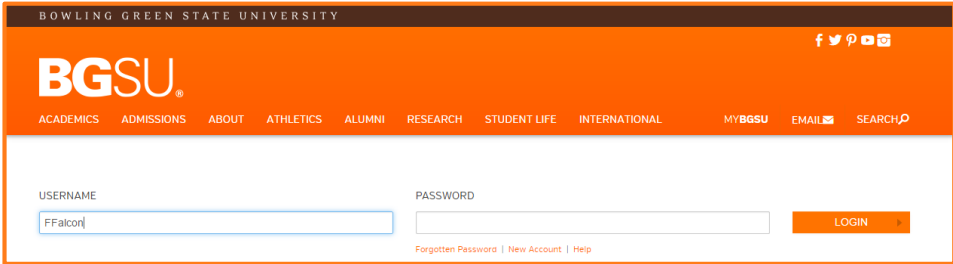
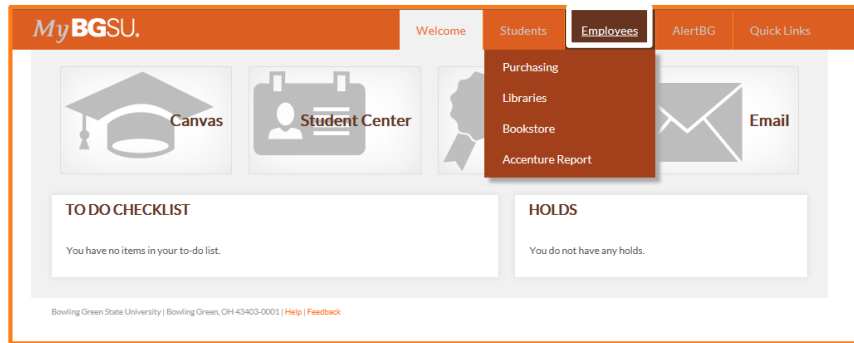


Manager Self Service (MSS) - Transactions

<p>PROCESS OVERVIEW</p>	<p>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).</p> <ol style="list-style-type: none"> 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
<p>Where do I go?</p>	<p>MyBGSU > Employees > Manager Information > Manager Dashboard/Quick Links > Choose appropriate Transaction</p>
<p>SECTION I NAVIGATION</p> <p>Begin the process at the bgsu.edu home page.</p> <p><i>Note: Please use Internet Explorer</i></p>	
<p>Step 1: Click MyBGSU</p>	
<p>Step 2: Enter USERNAME and PASSWORD</p> <p><i>Note: These will be your BGSU network credentials.</i></p> <p>Step 2a: Click Login</p>	

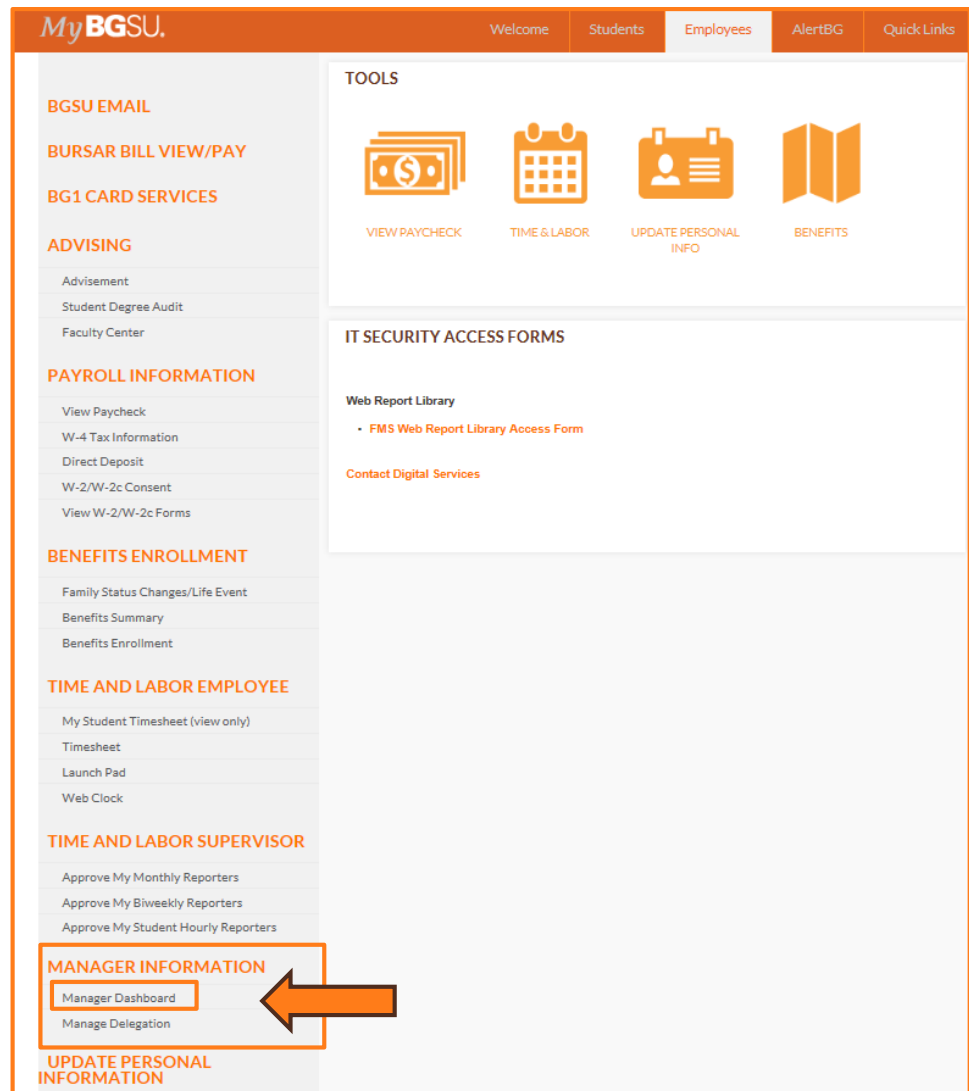
Manager Self Service (MSS) - Transactions

Step 3: Click Employees



Step 4: Under Manager Information

- Click **Manager Dashboard**

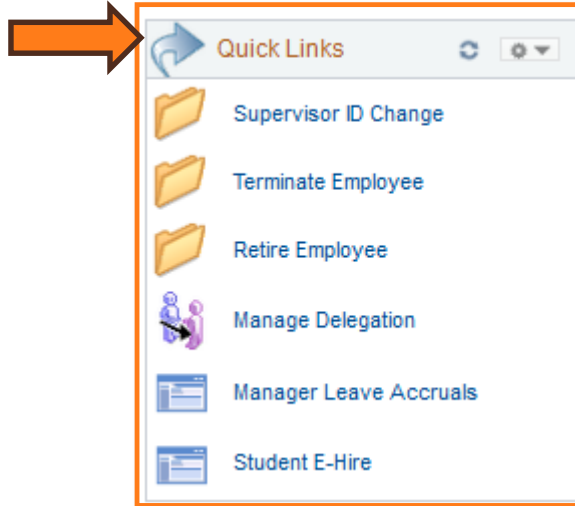


Manager Self Service (MSS) - Transactions

SECTION II QUICK LINKS


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

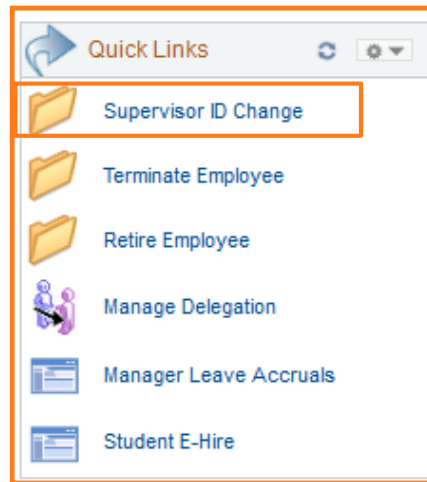
- Supervisor ID Change (all students and some staff)
- Terminate Employee
- Retire Employee
- Manage Delegation
- Student E-Hire



SECTION III SUPERVISOR ID CHANGE

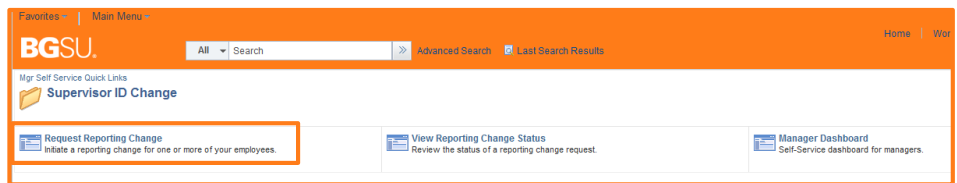
Managers and Student Supervisors will have the ability to transfer a student employee or possibly a faculty member from one supervisor to another.

Step 1: Click on the  [Supervisor ID Change](#)



Step 2: Click

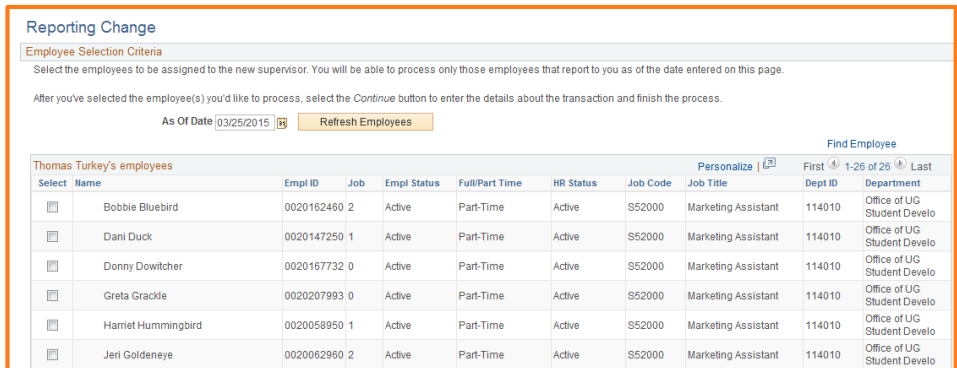
 [Request Reporting Change](#) hyperlink



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 



Manager Self Service (MSS) - Transactions

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

Step 5: Click **Continue**

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

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			
<input checked="" type="checkbox"/>	Bobbie Bluebird	0020162460	2	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo			
<input type="checkbox"/>	Dani Duck	0020147250	1	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo			
<input type="checkbox"/>	Donny Dowtcher	0020167732	0	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo			
<input type="checkbox"/>	Greta Grackle	0020207993	0	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo			
<input type="checkbox"/>	Harriet Hummingbird	0020058950	1	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo			
<input type="checkbox"/>	Jeri Goldeneye	0020062960	2	Active	Part-Time	Active	S52000	Marketing Assistant	114010	Office of UG Student Develo			

Select All Deselect All

[Return to Supervisor ID Change](#)

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

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

Request Reporting Change

Instructions

Selected Employees

Name	Job Title	Empl ID	Supervisor
Bobbie Bluebird	Marketing Assistant	0020162460	Thomas Turkey

Reporting Change Details

*Reporting Change Date: 03/25/2015


New Information Current Information

Supervisor: Thomas Turkey
 (Name Format: First Last)

Comments:

* Required Field
[Return to Select Employees](#)
[Return to Supervisor ID Change](#)

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

Use the  to perform a name search

Request Reporting Change

Instructions

Selected Employees

Name	Job Title	Empl ID	Supervisor
Bobbie Bluebird	Marketing Assistant	0020162460	Thomas Turkey

Reporting Change Details

*Reporting Change Date: 03/25/2015

New Information Current Information

Supervisor: Kenny Kurtland Thomas Turkey
 (Name Format: First Last)

Comments:

* Required Field

Manager Self Service (MSS) - Transactions

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

Step 10: Click 

Request Reporting Change

Instructions

Selected Employees

Name	Job Title	Empl ID	Supervisor
Bobbie Bluebird	Marketing Assistant	0020162460	Thomas Turkey

Reporting Change Details

*Reporting Change Date

New Information

Current Information

Supervisor

Thomas Turkey

(Name Format: First Last)

Comments



* Required Field

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 

Request Reporting Change Submit Confirmation



The Submit was successful.

Reporting Chg Approval Chain

:Pending View/Hide Comments

Supervisor Change Workflow

Skipped

Thomas Turkey
SES Approvers
03/25/15 - 10:07 AM

Pending

Multiple Approvers
SES Approvers

Comments



Step 13: Request Reporting Change page appears.

- This is a summary page Supervisor ID Change transaction.

Step 14: Click  hyperlink

Request Reporting Change

Selected Employees

Name	Job Title	Empl ID	Supervisor
Bobbie Bluebird	Marketing Assistant	0020162460	Thomas Turkey

Reporting Change Details

Reporting Change Date 03/25/2015

New Information

Current Information

Supervisor

Thomas Turkey

Comments

* Required Field

[Return to Select Employees](#)

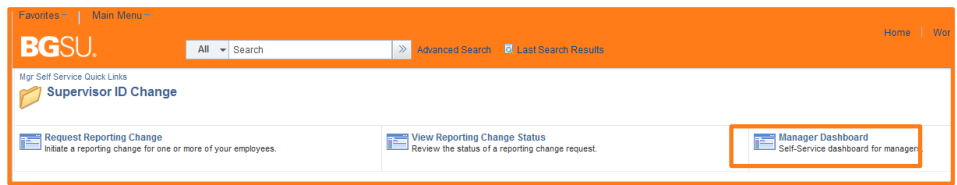
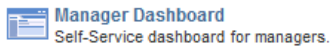
[Return to Supervisor ID Change](#)



Manager Self Service (MSS) - Transactions

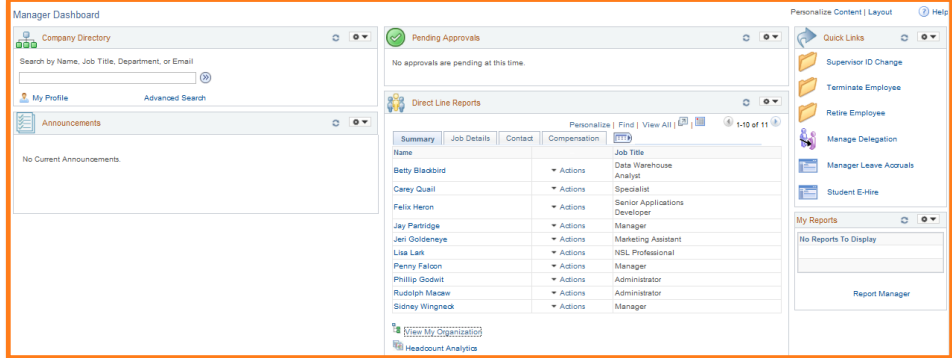
Step 15: You are returned to the **Supervisor ID Change** menu.

Step 16: Click



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

You have successfully completed the **Supervisor ID Change** transaction.

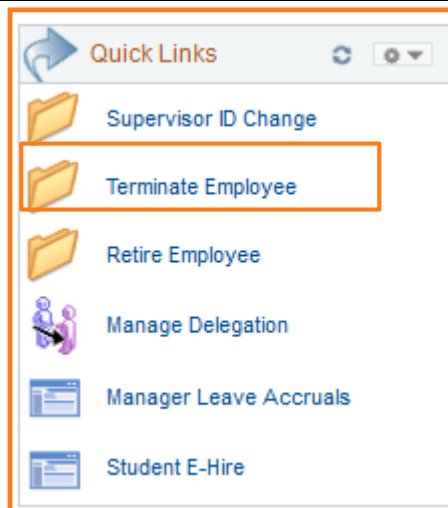
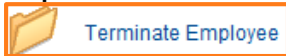


SECTION IV TERMINATE EMPLOYEE

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.

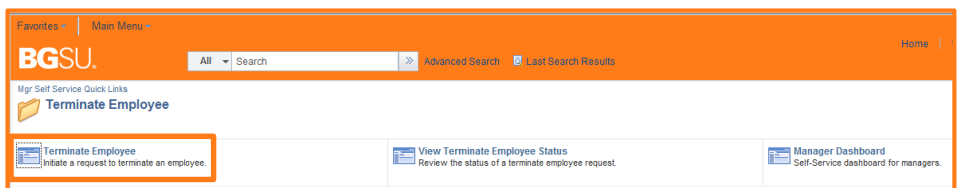
Step 1: Click on the



Step 2: Click




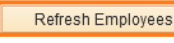
hyperlink



Manager Self Service (MSS) - Transactions


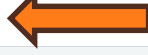
Step 3: All of the Manager's Direct Reports will show **As of the Date** you enter.

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

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

Terminate Employee

Employee Selection Criteria
Select the employee to be terminated. 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 

Freddie Falcon's employees

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


[Return to Terminate Employee](#)

Step 4: Click

 next to the employee to be terminated.

Terminate Employee

Employee Selection Criteria
Select the employee to be terminated. 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

Freddie Falcon's employees

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

[Return to Terminate Employee](#)

Step 5: The Terminate Employee page appears.


Terminate Employee

Betty Blackbird

Instructions

Reason for Termination

Empl ID 0000413887
Job Title Data Warehouse Analyst

*Termination Date 03/24/2015 

Reason for Termination

Comments

* Required Field
[Return to Select Employees](#)
[Return to Terminate Employee](#)

Manager Self Service (MSS) - Transactions

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

Terminate Employee
Betty Blackbird
 ▶ Instructions
 Reason for Termination
 Empl ID 0000413887
 Job Title Data Warehouse Analyst
 *Termination Date 03/24/2015
 Reason for Termination
 Comments
 Submit
 * Required Field
[Return to Select Employees](#)
[Return to Terminate Employee](#)

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

Reason for Termination
 Death
 Disciplinary Removal
 End Foreign Employment AUS
 End of Fixed-Term Contract
 Failure to Return from Leave
 I9 Not Completed
 Job Abandonment
 Never Worked
 Non-Renewal-Closure
 Non-Renewal-Funding
 Non-Renewal-Reorganization
 Non-renewal of contract-Other
 Partial/Total Disability
 Permanent ERE
 Probationary Removal
 Resignation
 Staff Reduction
 State System Retirement
 Student Graduated
 Student Left BGSU
 Student ineligible to work
 Voluntary Separation Program

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

Comments Betty is moving to Japan.

Manager Self Service (MSS) - Transactions

Step 9: Click

Submit

Terminate Employee

Betty Blackbird

Instructions

Reason for Termination

Empl ID 0000413887
Job Title Data Warehouse Analyst

*Termination Date 03/24/2015

Reason for Termination Resignation

Comments Betty is moving to Japan.

Submit

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

Submit Confirmation

✓ You have successfully submitted the Terminate request for Betty Blackbird as of 3/24/2015.

Terminate Employee Approval

:Pending View/Hide Comments

Terminate Employee Workflow

Skipped

Freddie Falcon
HR, Approvers
03/24/15 - 2:45 PM

Pending

Multiple Approvers
HR, Approvers

Reviewer

Robin Finch
Reviewer

Reviewer

Sherideen Stoll
Reviewer

Reviewer

Freddie Falcon
Reviewer

Reviewer

Scarlet Raven
Reviewer

Reviewer

Sylvester Byrdman
Reviewer

Reviewer

Robert Blue
Reviewer

Reviewer

Geoffrey Tracy
Reviewer

Reviewer

Freddie Falcon
Reviewer

Reviewer

Freddie Falcon
Reviewer

Manager Self Service (MSS) - Transactions

Step 11: Click on the

[Return to Terminate Employee](#)

hyperlink

You have successfully entered an employee's termination transaction.

Submit Confirmation



You have successfully submitted the Terminate request for Betty Blackbird as of 3/24/2015.

Terminate Employee Approval

:Pending [View/Hide Comments](#)

Terminate Employee Workflow

Skipped

Freddie Falcon
HR Approver
03/24/15 - 2:46 PM

Pending

Multiple Approvers
HR Approvers

Reviewer

Robin Finch
Reviewer

Reviewer

Sherdeen Stoll
Reviewer

Reviewer

Freddie Falcon
Reviewer

Reviewer

Scarlet Raven
Reviewer

Reviewer

Sylvester Byrdman
Reviewer

Reviewer

Robert Blue
Reviewer

Reviewer

Geofrey Tracy
Reviewer

Reviewer

Freddie Falcon
Reviewer

Reviewer

Freddie Falcon
Reviewer

Comments

-FREDDIE at 03/24/15 - 2:46 PM
Betty is moving to Japan.

System at 03/24/15 - 2:46 PM
Requester (FREDDIE) is approver on step number 2, path 1, stage 10, which has self-approval disabled! (18081,1031)

[Return to Select Employees](#)

[Return to Terminate Employee](#)



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

Step 13: Click

[Manager Dashboard](#)
Self-Service dashboard for managers.

Favorites | Main Menu

BGSU. All Search >> Advanced Search | Last Search Results Home

Mgr Self Service Quick Links

Terminate Employee

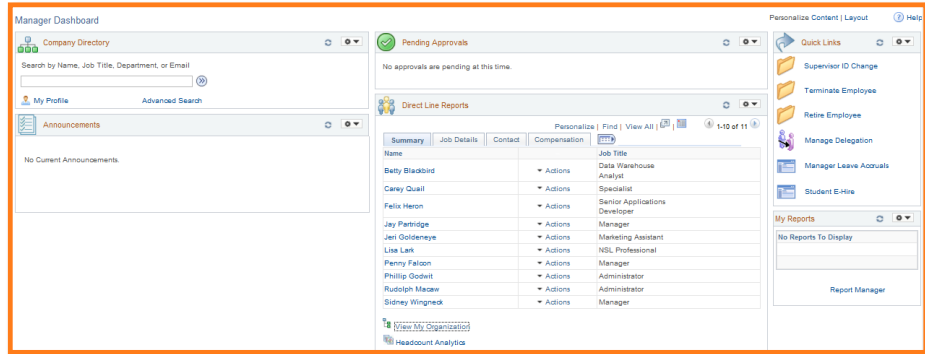
Terminate Employee
Initiate a request to terminate an employee.

View Terminate Employee Status
Review the status of a terminate employee request.

Manager Dashboard
Self-Service dashboard for managers.

Manager Self Service (MSS) - Transactions

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

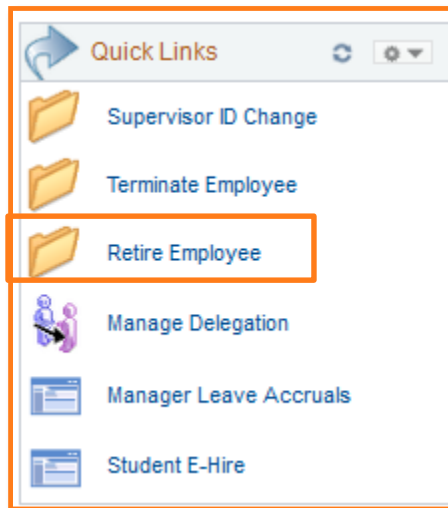


SECTION V RETIRE EMPLOYEE

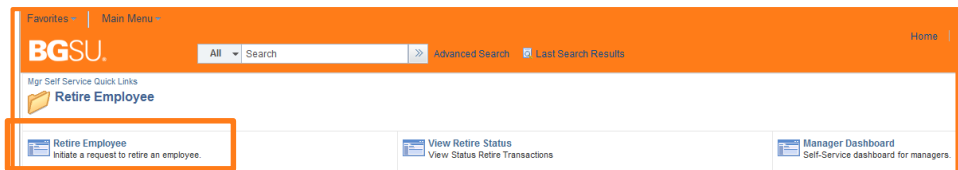
Managers will have the capability to retire their direct reports.

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



Manager Self Service (MSS) - Transactions



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 

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  

Find Employee

Select	Name	Empl ID	Job	Empl Status	Full/Part Time	HR Status	Position	Job Code	Job Title	Dept ID	Department
<input type="button" value="Select"/>	Betty Blackbird	0000413887	0	Active	Full-Time	Active	00000152	800100	Data Warehouse Analyst	316000	Information Technology Service
<input type="button" value="Select"/>	Carey Quail	0000582042	0	Active	Full-Time	Active	00005458	800078	Specialist	316000	Information Technology Service
<input type="button" value="Select"/>	Felix Heron	0005787386	0	Active	Full-Time	Active	00004001	800127	Senior Applications Developer	316000	Information Technology Service
<input type="button" value="Select"/>	Jay Partridge	0009886142	0	Active	Full-Time	Active	00008280	800059	Manager	316000	Information Technology Service
<input type="button" value="Select"/>	Lisa Lark	0009567585	0	Active	Part-Time	Active	00008267	700003	NSL Professional	316000	Information Technology Service
<input type="button" value="Select"/>	Penny Falcon	0000809349	0	Active	Full-Time	Active	00004966	800059	Manager	316000	Information Technology Service
<input type="button" value="Select"/>	Phillip Godwit	0000879991	0	Active	Full-Time	Active	00000722	800005	Administrator	316000	Information Technology Service
<input type="button" value="Select"/>	Rudolph Macaw	0004915046	0	Active	Full-Time	Active	00005905	800005	Administrator	316000	Information Technology Service
<input type="button" value="Select"/>	Sidney Widgeon	0000154547	0	Active	Full-Time	Active	00008271	800059	Manager	316000	Information Technology Service
<input type="button" value="Select"/>	Warren Kirtland	0020194313	0	Active	Full-Time	Active	00001448	800104	Applications Developer	316000	Information Technology Service



Step 4: Click



next to the employee to be retired.

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  

Find Employee

Select	Name	Empl ID	Job	Empl Status	Full/Part Time	HR Status	Position	Job Code	Job Title	Dept ID	Department
<input type="button" value="Select"/>	Betty Blackbird	0000413887	0	Active	Full-Time	Active	00000152	800100	Data Warehouse Analyst	316000	Information Technology Service
<input type="button" value="Select"/>	Carey Quail	0000582042	0	Active	Full-Time	Active	00005458	800078	Specialist	316000	Information Technology Service
<input type="button" value="Select"/>	Felix Heron	0005787386	0	Active	Full-Time	Active	00004001	800127	Senior Applications Developer	316000	Information Technology Service
<input type="button" value="Select"/>	Jay Partridge	0009886142	0	Active	Full-Time	Active	00008280	800059	Manager	316000	Information Technology Service
<input type="button" value="Select"/>	Lisa Lark	0009567585	0	Active	Part-Time	Active	00008267	700003	NSL Professional	316000	Information Technology Service
<input type="button" value="Select"/>	Penny Falcon	0000809349	0	Active	Full-Time	Active	00004966	800059	Manager	316000	Information Technology Service
<input type="button" value="Select"/>	Phillip Godwit	0000879991	0	Active	Full-Time	Active	00000722	800005	Administrator	316000	Information Technology Service
<input type="button" value="Select"/>	Rudolph Macaw	0004915046	0	Active	Full-Time	Active	00005905	800005	Administrator	316000	Information Technology Service
<input type="button" value="Select"/>	Sidney Widgeon	0000154547	0	Active	Full-Time	Active	00008271	800059	Manager	316000	Information Technology Service
<input type="button" value="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 

*Reason for Retirement

Manager Self Service (MSS) - Transactions

Step 6: Select the **Retirement Date**, this should be first of the month following the retirement.

Retire Employee
Lisa Lark
Instructions
Retirement Details
Empl ID 0009567585
Job Title NSL Professional
Retirement Date 04/01/2015
*Reason for Retirement
Submit

Step 7: Select a **Reason for Retirement** from the drop down.

*Reason for Retirement
Normal Retirement
State Disability
Voluntary Separation Program

Step 8: Click

Submit

Retire Employee
Lisa Lark
Instructions
Retirement Details
Empl ID 0009567585
Job Title NSL Professional
Retirement Date 04/01/2015
*Reason for Retirement Normal Retirement
Submit

Manager Self Service (MSS) - Transactions

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










Submit Confirmation

✓ You have successfully submitted the Retire request for Lisa Lark as of 4/1/2015.

Retire Employee Approval

▼ :Pending View/Hide Comments

Retire Approval Workflow

Skipped
 Freddie Faloon HR Approvers 03/30/15 - 11:18 AM
Pending
 Multiple Approvers HR Approvers
Reviewer
 Robin Finch Reviewer
Reviewer
 Freddie Faloon Reviewer
Reviewer
 Sherdeen Stoll Reviewer
Reviewer
 Freddie Faloon Reviewer
Reviewer
 Scarlet Raven Reviewer
Reviewer
 Sylvester Bjrdman Reviewer
Reviewer
 Robert Blue Reviewer
Reviewer
 Geoffrey Tracy Reviewer
Reviewer
 Freddie Faloon Reviewer
Reviewer
 Freddie Faloon Reviewer

▶ **Comments**

[Return to Select Employees](#)

[Return to Retire Employee](#)

Manager Self Service (MSS) - Transactions

Step 11: Click on the

[Return to Retire Employee](#)

hyperlink

You have successfully entered an employee's retirement transaction.

Submit Confirmation



You have successfully submitted the Retire request for Lisa Lark as of 4/1/2015.

Retire Employee Approval

Retire Approval Workflow

Skipped

Freddie Faloon
HR Approver
03/30/15 - 11:18 AM

Pending

Multiple Approvers
HR Approver

Reviewer

Robin Finch
Reviewer

Reviewer

Freddie Faloon
Reviewer

Reviewer

Sherideen Stoll
Reviewer

Reviewer

Freddie Faloon
Reviewer

Reviewer

Scarlet Raven
Reviewer

Reviewer

Sylvester Byrdman
Reviewer

Reviewer

Robert Blue
Reviewer

Reviewer

Geoffrey Tracy
Reviewer

Reviewer

Freddie Faloon
Reviewer

Reviewer

Freddie Faloon
Reviewer

Comments

[Return to Select Employees](#)

[Return to Retire Employee](#)

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

Step 13: Click

[Manager Dashboard](#)
Self-Service dashboard for managers.

Favorites | Main Menu

BGSU. All Search > Advanced Search | Last Search Results Home

My Self Service Quick Links

[Retire Employee](#)

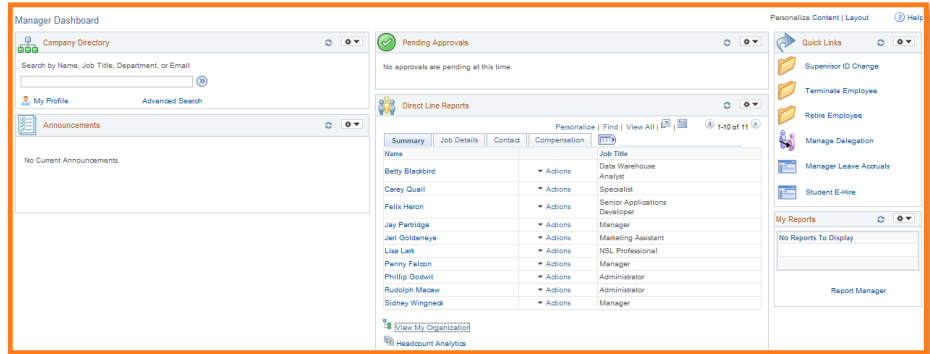
Retire Employee
initiate a request to retire an employee.

View Retire Status
View Status Retire Transactions

[Manager Dashboard](#)
Self-Service dashboard for managers.

Manager Self Service (MSS) - Transactions

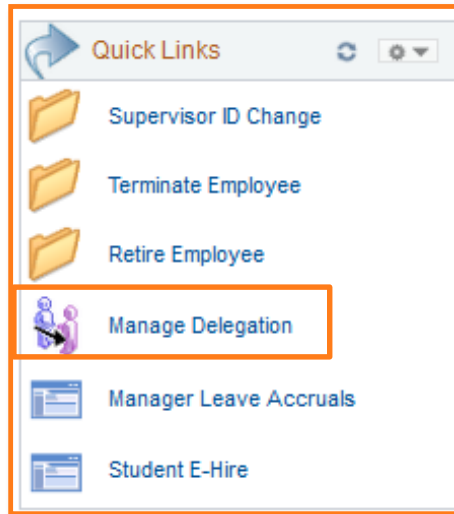
Step 14: You will be returned to the **Manager Dashboard**



SECTION VI MANAGE DELEGATION

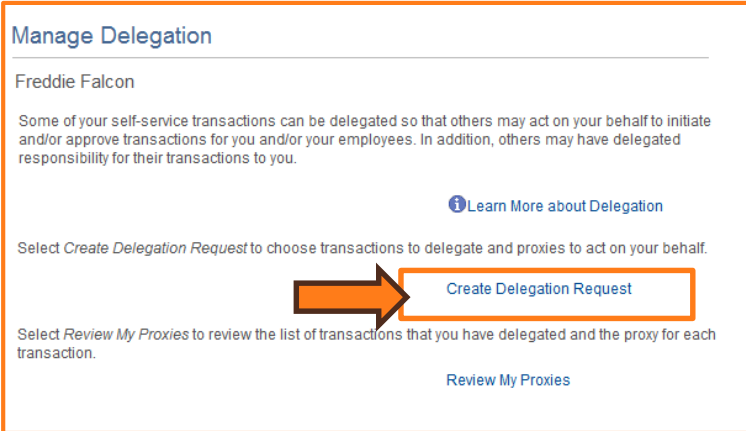
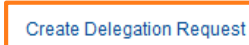
Quick Links allows the option to delegate self-service transactions while you are out of the office.

Step 1: Click



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

Step3: Click



Manager Self Service (MSS) - Transactions

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

Create Delegation Request

Enter Dates

Freddie Falcon

Director

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date 03/24/2015

To Date

Next

Cancel

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

Next

Create Delegation Request

Enter Dates

Freddie Falcon

Director

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date 03/24/2015


To Date 03/31/2015

Next

Cancel

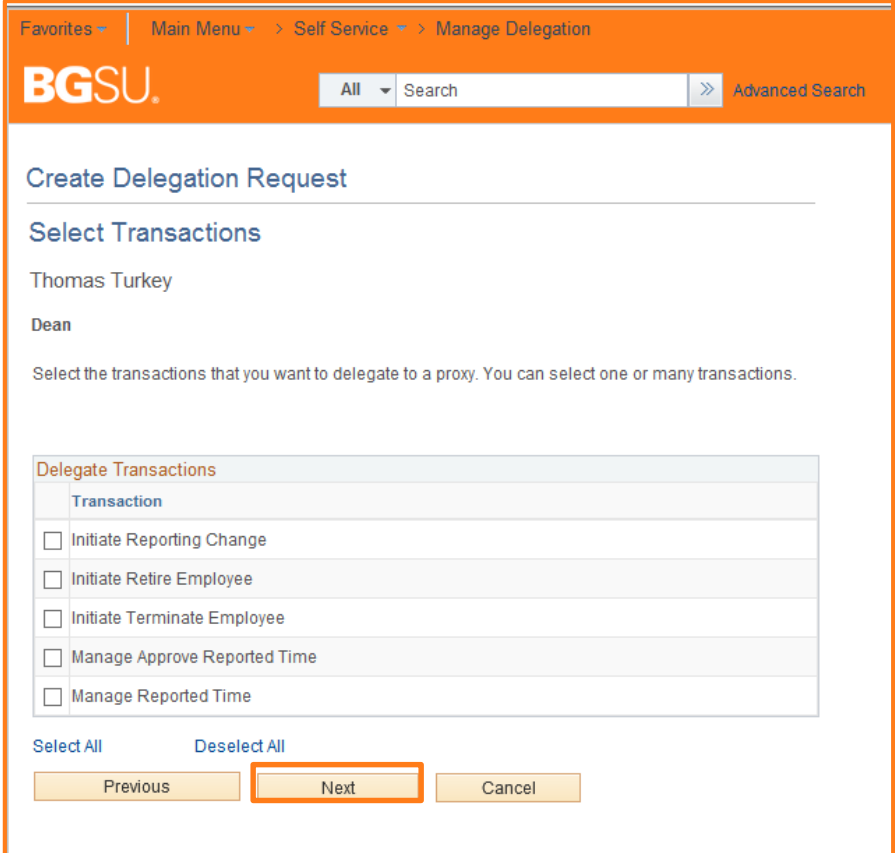
Manager Self Service (MSS) - Transactions

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





Favorites | Main Menu > Self Service > Manage Delegation

BGSU. All Search >> Advanced Search

Create Delegation Request


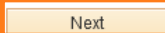
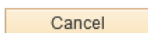
Select Transactions

Thomas Turkey
Dean

Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions	
Transaction	
<input type="checkbox"/> Initiate Reporting Change	
<input type="checkbox"/> Initiate Retire Employee	
<input type="checkbox"/> Initiate Terminate Employee	
<input type="checkbox"/> Manage Approve Reported Time	
<input type="checkbox"/> Manage Reported Time	

Select All Deselect All

Manager Self Service (MSS) - Transactions

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

Step 9: Click

Next

Create Delegation Request

Select Proxy by Hierarchy

Freddie Falcon

Director

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the Search by Name hyperlink to search for proxies outside your hierarchy.

Choose Delegate

Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name
<input type="radio"/> Betty Blackbird	0000413887	Employee	Data Warehouse Analyst	Information Technology Service	Freddie Falcon
<input type="radio"/> Carey Quall	0000582042	Employee	Specialist	Information Technology Service	Freddie Falcon
<input type="radio"/> Felix Heron	0005787386	Employee	Senior Applications Developer	Information Technology Service	Freddie Falcon
<input type="radio"/> Jay Partridge	0009686142	Employee	Manager	Information Technology Service	Freddie Falcon
<input type="radio"/> Jenna Senegal	0003738991	Employee	Executive Assistant	Information Technology Service	Sylvester Byrdman
<input type="radio"/> Lisa Lark	0009567585	Employee	NSL Professional	Information Technology Service	Freddie Falcon
<input checked="" type="radio"/> Mary Sparrow	0020226871	Employee	Manager	Information Technology Service	Sylvester Byrdman
<input type="radio"/> Oliver Meyers	0000966945	Employee	Associate Manager	Information Technology Service	Sylvester Byrdman
<input type="radio"/> Penny Falcon	0000809349	Employee	Manager	Information Technology Service	Freddie Falcon
<input type="radio"/> Phillip Godwit	0000879991	Employee	Administrator	Information Technology Service	Freddie Falcon
<input type="radio"/> Robert Blue	0001213474	Employee	Director	Information Technology Service	Sylvester Byrdman
<input type="radio"/> Robin Finch	0000855200	Employee	Director	Information Technology Service	Sylvester Byrdman
<input type="radio"/> Rudolph Macaw	0004915046	Employee	Administrator	Information Technology Service	Freddie Falcon
<input type="radio"/> Scarlet Raven	0020225009	Employee	Accountant	Information Technology Service	Sylvester Byrdman
<input type="radio"/> Sidney Wingneck	0000154547	Employee	Manager	Information Technology Service	Freddie Falcon

Previous

Next

Cancel

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

Create Delegation Request

Delegation Detail

Freddie Falcon

Director

Proxy Mary Sparrow

From Date 03/25/2015

To Date 03/31/2015

Transactions

Manage Approve Reported Time


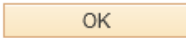
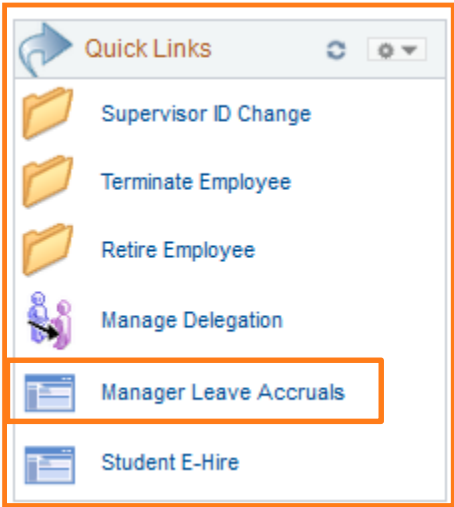
Manage Reported Time

Submit

Previous

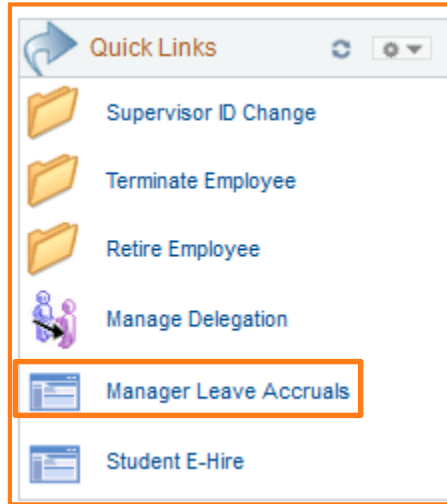
Cancel

Manager Self Service (MSS) - Transactions

<p>Step 12: The Create Delegation Request page appears.</p> <p>Step 13: Click </p>	<div style="border: 1px solid orange; padding: 10px;"> <h3>Create Delegation Request</h3> <p>Freddie Falcon</p> <p>Director</p> <p>You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.</p> <p style="text-align: center;"></p> </div>
<p>Step 14: You will be directed back to the Manage Delegation page.</p> <p style="color: orange; text-align: center;">You have successfully created a Delegate.</p>	<div style="border: 1px solid orange; padding: 10px;"> <h3>Manage Delegation</h3> <p>Freddie Falcon</p> <p>Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.</p> <p style="text-align: right;">Learn More about Delegation</p> <p>Select <i>Create Delegation Request</i> to choose transactions to delegate and proxies to act on your behalf.</p> <p style="text-align: right;">Create Delegation Request</p> <p>Select <i>Review My Proxies</i> to review the list of transactions that you have delegated and the proxy for each transaction.</p> <p style="text-align: right;">Review My Proxies</p> </div>
<p style="color: orange; text-align: center;">SECTION VII MANAGER LEAVE ACCRUALS</p> <p>Managers have the capability to review their direct reports Leave Accrual balances.</p> <ul style="list-style-type: none"> 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. 	<div style="border: 1px solid orange; padding: 10px;">  <p>The screenshot shows a 'Quick Links' window with a list of options: Supervisor ID Change, Terminate Employee, Retire Employee, Manage Delegation, Manager Leave Accruals (highlighted with an orange box), and Student E-Hire.</p> </div>

Manager Self Service (MSS) - Transactions

Step 1: Click



Step 2: Enter the Search criteria

(e.g. Partridge/Last Name)



Step 3: Click

Manager Leave

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

Find an Existing Value

Search Criteria

Empl ID: begins with []

Empl Record: = []

Name: begins with []

Last Name: begins with [partridge]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Step 4: Current Balances appear

Review Sick, Vacation and Personal balances

Current Balance Monthly Leave Accrual Leave Accrual

Empl ID: 0009686142 Partridge, Jay Benefit Rcd Nbr: 0

Benefit Program: Monthly

Plan Type	Accrual Date	Leave Hours Balance
Sick	01/01/2015	272.160000
Vacation	01/31/2015	193.260000
Personal	01/01/2015	20.000000

[Back to Direct Reports](#)

Manager Self Service (MSS) - Transactions

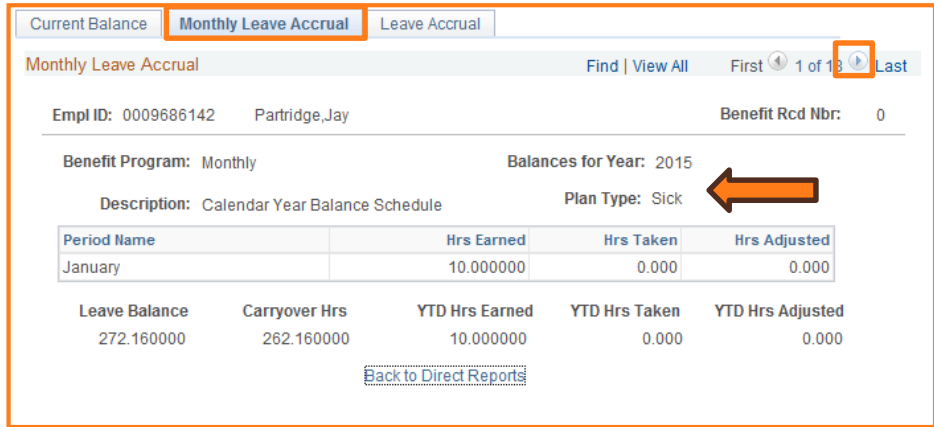
Step 5: Click

[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



Current Balance **Monthly Leave Accrual** Leave Accrual

Monthly Leave Accrual Find | View All First 1 of 1 Last

Empl ID: 0009686142 Partridge, Jay Benefit Rcd Nbr: 0

Benefit Program: Monthly Balances for Year: 2015

Description: Calendar Year Balance Schedule Plan Type: Sick

Period Name	Hrs Earned	Hrs Taken	Hrs Adjusted
January	10.000000	0.000	0.000

Leave Balance	Carryover Hrs	YTD Hrs Earned	YTD Hrs Taken	YTD Hrs Adjusted
272.160000	262.160000	10.000000	0.000	0.000

[Back to Direct Reports](#)

Step 7: Click

[Leave Accrual](#)

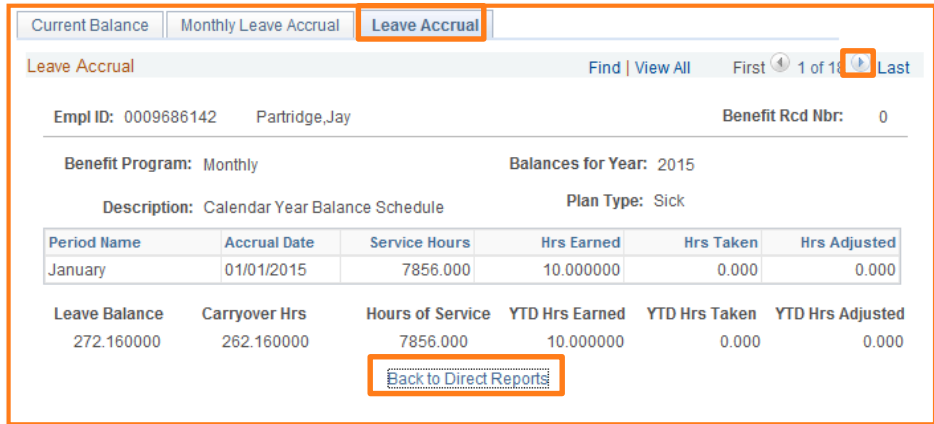
tab

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](#)



Current Balance Monthly Leave Accrual **Leave Accrual**

Leave Accrual Find | View All First 1 of 1 Last

Empl ID: 0009686142 Partridge, Jay Benefit Rcd Nbr: 0

Benefit Program: Monthly Balances for Year: 2015

Description: Calendar Year Balance Schedule Plan Type: Sick

Period Name	Accrual Date	Service Hours	Hrs Earned	Hrs Taken	Hrs Adjusted
January	01/01/2015	7856.000	10.000000	0.000	0.000

Leave Balance	Carryover Hrs	Hours of Service	YTD Hrs Earned	YTD Hrs Taken	YTD Hrs Adjusted
272.160000	262.160000	7856.000	10.000000	0.000	0.000

[Back to Direct Reports](#)

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