

Manager Self Service Quick Reference Guide

What is Manager Self Service?

Manager self service is a feature of My HR Info (PeopleSoft) which automates certain HR forms and related approval processes through online workflow. Your UserID and password for Manager Self Service are the same as for Employee Self Service in My HR Info.***

Access to My HR Info (PeopleSoft) - Manager Self Service

All Managers (except Hamilton Police Service) will have access to Manager Self Service features. As you transfer in or out of Manager positions, access will automatically be granted (or removed). Non Managers may also have access to Manager Self Service if they become a proxy as a result of accepting a delegation from a Manager to initiate transactions on their behalf. This typically applies to administrative support staff. (Note: Manager is a generic term referring to anyone who has employees reporting to him/her in PeopleSoft Position Management; e.g. Supervisor, Manager, Director, etc).



Need Help? If you are having trouble accessing the “My HR Info” features, please contact the City of Hamilton, IT Help Desk, 905-546-HELP (Monday to Friday, 8am to 4:30pm). To obtain your Employee ID (to be used in your User ID), please contact your department representative/supervisor.

***If your job duties require you to also have Administrative access to PeopleSoft’s core HR/Payroll modules, you will have received a second and different User ID for this purpose. Manager Self Service will be attached to this UserID only; however, this ID will only work when you access the system from within the City network. Administrative and Manager Self Service features will not be available to you from the City’s internet site.

General Information

Emails All emails generated via My HR Info will be From: MyHRInfo@hamilton.ca. Emails will be generated at various stages in the process to keep you updated about your transactions. e.g. approval/action is required; denied in the approval chain, & processed/cancelled by HR (if you were the initiator of the transaction).

Approval Chain & Routing: Key Concepts:

The approval chain is built based on the Position Management (Org Chart) reporting structure at the time the transaction is submitted. HR Mandatory approval levels are defined per transaction. Managers may add additional approvers to meet department-specific requirements.

Transactions are routed to the UserID of the active Manager in the position at the time the transaction is submitted; therefore:

-if a position is vacant, routing will skip over that position and go up to the next level in the chain, until the position is filled.

-if a Manager is in the position but transfers to another Manager position, pending transactions that have already been routed to him/her but not yet approved will follow with them. New transactions will route up 1 level if the former position is vacant, or to the new incumbent Manager.

-if a Manager is in the position but transfers to a non Manager position, terminates, or goes on leave status in Job Data, pending transactions will be in limbo. Managers should approve all pending transactions before exiting their position. If this was not done, contact the HR Workflow Administrator for assistance. New transactions will route up 1 level until the position is filled.

-if a Manager goes off sick, pending transactions will be in limbo. New transactions will continue to route to the sick Manager because the system considers them to still be active. Contact the HR Workflow Administrator for assistance.

-if two active Managers are in the same position #, the transaction will be routed to the Manager with the lowest employee id. Contact the HR Workflow Administrator for assistance. Please refrain from over allocating management positions with 2 active incumbents to help avoid these issues.



Need Help? If you need help reassigning pending transactions or creating delegations for your absent Managers, please contact the HR Workflow Administrators for assistance (Maureen McDaniel; Vicki Sikora; Karen Burtch).



Manage Delegation is used to delegate, accept and revoke responsibility for Manager Self Service transactions. If you are a Manager, you must decide if you wish to initiate your own transactions, or if you wish to delegate this responsibility to your administrative support staff (your proxies). You may also delegate your approval authority to others. Therefore, any employee may become a proxy as a result of a Manager delegating responsibility to them.

Learn More about Delegation provides more details about what delegation is, why you want to use it, how it works, etc.

Create Delegation Request is used to choose transactions to delegate and to choose proxies to act on your behalf. You may delegate approval to only 1 person, and delegate initiate to up to 3 people per transaction.

Review My Proxies is used to review the transactions that you have delegated and to revoke delegated authority.

My Delegated Authorities is used to review the transactions that have been delegated to you by others, and to accept or reject their delegation requests to you.



Need Help? If you need help using the “Manage Delegations” features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact the HR Workflow Administrators (Maureen McDaniel; Vicki Sikora; Karen Burtch).



Transfer Employees is used to transfer an employee to a different position # due to employee movement that is not handled through the posting process. e.g. Employee Request; Employer Initiated; Return to Previous Position; Short Term Coverage; Seasonal; Training Complete (Fire); Internal Posting Process (ONA/Fire/OPSEU).

Transfer Employee is used to initiate a transfer request for your current employees.

Approve Transfer is used to approve (or deny) a transfer request that has been routed to you. Routing is based on the current reporting structure for the position the employee is transferring into, regardless of transaction effective date.

View Transfer Status is used to view the status of transfer transactions that you have been involved with either as an initiator, approver or delegate.



Need Help? If you need help using the “Transfer Employees” features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact your HR Records Coordinator.

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Employee Pay Rate Changes is used to initiate pay rate changes for your employees. e.g. Step Progression; Merit-Performance Based; Add/Remove Additional Duty Pay; Probation Complete (School Crossing/Fire); Change in Qualifications.

Request Pay Rate Change is used to initiate a pay rate change request for your current employees.

Approve Pay Rate Change is used to approve (or deny) a pay rate change request that has been routed to you. Routing is based on the employee's current position's reporting chain, regardless of transaction effective date.

View Pay Rate Change Status is used to view the status of pay rate change transactions that you have been involved with either as an initiator, approver or delegate.

Note: Employee Pay Rate Change transactions are not available in Manager Self Service to HPL Managers.



Need Help? If you need help using the "Employee Pay Rate Changes" features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact your HR Records Coordinator.



Termination/Retirements is used to initiate voluntary terminations or retirements for your employees. e.g. Resignation; End of Temporary Employment; Death; Early Retirement; Normal Retirement.

Terminate/Retire Employee is used to initiate a termination/retirement request for your current employees.

Approve Term/Retire Employee is used to approve (or deny) a termination/retirement request that has been routed to you. Routing is based on the employee's current position's reporting chain, regardless of transaction effective date.

View Term/Retire Status is used to view the status of termination/retirement transactions that you have been involved with either as an initiator, approver or delegate.

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Note: For Involuntary Terminations, please contact your HR Labour Relations Officer.



Need Help? If you need help using the "Termination/Retirement" features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact your HR Records Coordinator.



Job Openings is used to access the various tools to create, approve, browse and access job openings.

Create Job Opening is used to create a job opening and initiate the job posting process for filling positions. e.g. Additional Staff; Replacement Staff; New Job/Position; Special Assignment.

Approve Job Opening is used to approve (or deny) a job opening that has been routed to you. Routing is based on the current reports to for the position being posted.

Job Reqs (Pre-July 2017) is used to view historical job requisitions you have been involved with either as an initiator, approver or delegate.

Search Job Postings is used to search and view currently posted internal and external job postings.

Browse Job Openings is used to access your draft, assigned or associated with you job openings.

Note: Job Openings is not available in Manager Self Service to HPL Managers.



Need Help? If you need help using the "Job Openings" features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact your HR Recruitment Coordinator.



Smart HR Template is used to initiate the hire/rehire process for positions that are not facilitated through a posting/not processed by HR Employment Services e.g. High School Coop Students; College/University Coop

Students; School Crossing Guards; Library Non Union Part Time Positions; Other Miscellaneous Non Posted Hires.

Smart HR Transactions is used to initiate a non posted hire/rehire transaction for your new employees.

Transaction Status is used to view the status of the Smart HR transactions that you have initiated.

Note: Smart HR transactions do not have an approval process: they are submitted directly to HR Records for processing. Therefore, they are only available on the status page of the initiator of the transaction since no one else is involved in the chain.



Need Help? If you need help using the "Smart HR" features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact your HR Records Coordinator.



View Employee Personal Info is used to view your employees' current contact information and job data. e.g. Emergency Contacts; Phone Numbers; Email Addresses; Job Data.



Need Help? If you need help using the "View Employee Personal Info" features, please refer to the User Guide on the Manager Self Service Home Page in My HR Info. If further assistance is required, please contact your HR Records Coordinator.

Important Steps If You Are Changing Positions or Terminating Employment

Delegations are attached to a User ID; therefore if you transfer to another department, or your delegate transfers, delegations will follow: you will need to revoke them and create new ones to the appropriate staff.

Pending Transactions that have already been routed to you but not yet approved will follow with you. Please approve all pending transactions before exiting your position.

Pending Alerts (Merit, ASP) that have been emailed to you but not yet acted on should be addressed before exiting. If not, please forward your email alert to your Manager for action.