ATTACHMENT 7.b

PeopleSoft Timecard User Documentation

EMPLOYEE
Time Entry - Training Guide

Created July 2007
Updated September 17, 2007

Table of Contents

Logging into the Network

1. The IT department assigns you a network login when you start at the City. If you have not logged into the network, you can request your login and password from the IT Help Desk at x1234.
2. Turn on the computer.
3. It will then give you a page to log into Windows by pressing the CTRL key and the ALT key and the DEL key at the same time
4. If this is your desk computer, it will already enter in the username. If the username is not yours then you need to enter in your username
5. Enter in your first initial followed by your last name and then the"@" symbol then springfield1.net.

Example: hsimpson@springfield1.net

6. Enter in your password
7. Click on the OK button
8. You will then be logged into the City of Springfield network.

Reaching and Logging on to PeopleSoft HRMS

1. Launch the browser (Internet Explorer) 

and navigate to Springboard. http://springboard

2. From Springboard, you will Select Employee Self Service by clicking on the picture or the "Employee Self Service" text.

The PeopleSoft sign on page should then display and you can sign-on to the PeopleSoft system. Your ID and PASSWORD must be entered in UPPERCASE.

Your ID is the first four characters of your last name, followed by the last 4 digits of your social security number.

Your password is assigned to you and you should change it every so often. It is important that your login stays secure because there is a lot of sensitive information. You can follow the instructions in the Employee Self Service documentation on how to change your password.

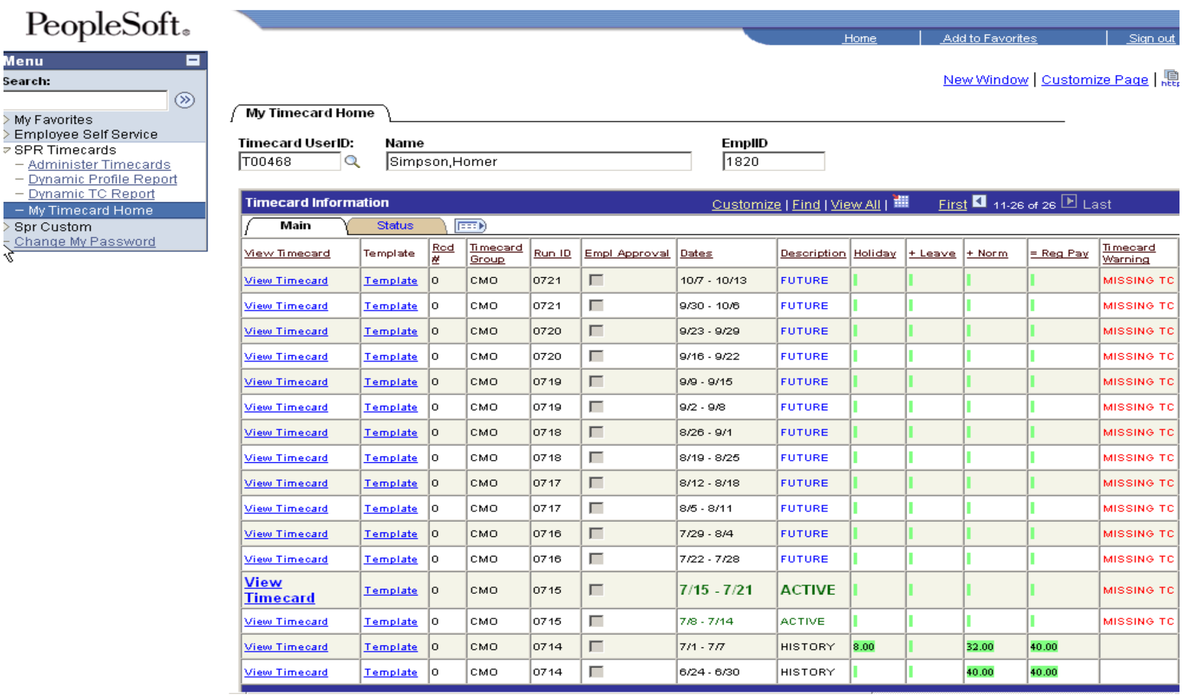
If you attempt to login to the system 3 times incorrectly, you will be locked out of the system. If this happens, or you have forgotten your password, you will need to contact the IT Help Desk at X1234 to have them unlock or reset your password.

Accessing your Timecard

After you login, click on SPR Timecard and then on My Timecard Home by using the left-hand navigation menu. The "My Timecard Home" page shows a summary of all the timecards that you have available to you. This is a *view only* page. There are 3 types of timecards:

Future – timecards for a future date
Active – the current 2 week time period
History – timecards from the past

(The first time you login you will only have future timecards showing.)



View Timecard	Template	Rcd #	Timecard Group	Run ID	Empl Approval	Dates	Description	Holiday	+ Leave	+ Norm	= Reg Pay	Timecard Warning
View Timecard	Template	0	CMO	0721		10/7 - 10/13	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0721		9/30 - 10/6	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0720		9/23 - 9/29	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0720		9/16 - 9/22	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0719		9/9 - 9/15	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0719		9/2 - 9/8	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0718		8/26 - 9/1	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0718		8/19 - 8/25	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0717		8/12 - 8/18	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0717		8/5 - 8/11	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0716		7/29 - 8/4	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0716		7/22 - 7/28	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0715		**7/15 - 7/21**	**ACTIVE**					MISSING TC
View Timecard	Template	0	CMO	0715		7/8 - 7/14	ACTIVE					MISSING TC
View Timecard	Template	0	CMO	0714		7/1 - 7/7	HISTORY	8.00		32.00	40.00	
View Timecard	Template	0	CMO	0714		6/24 - 6/30	HISTORY			40.00	40.00	

Different Columns on My Timecard Home Page:

View Timecard

You can access any of your Future, Active or Historical timecards that are shown by selecting the "View Timecard" link next to the week you wish to view. The line with Enlarged Fonts and green in color represents the active weeks. History is in black and the future rows are blue.

Template

You can access your timecard template by selecting the "Template" link next to any History, Active or Future record. The template is a timecard that is created, that has all of the possible lines with earnings codes for entering in your time. The template is created by you and is the “model” that will automatically fill in when you create a new timecard for yourself.

Timecard Group

Timecard Group is the department for which you work for, such as Fire or PW.

Run ID

Each paycheck you receive is associated with a 2 week block of time, called a “Run”. This ID is read as follows: Run-ID 0714 = “Pay period 14 of Year 2007”, Run-ID 0715 = “Pay period 15 of Year 2007”, and so-on.

Dates

The Beginning and End date for the week.

Description

A color-coded indicator for the employee to provide an easy way to determine if a Run-ID is Active, In-Process, Future or History.

Hours Columns

Once you’ve entered your first timecard, the Timecard Home page will display hours in each of the categories seen. (Holiday, Leave, Regular, Overtime, Accumulated Hours (Comp Time), Other Hours, and finally Adjustment amounts).

Timecard Warning

This red indicator will alert you if you have a missing timecard, or have entered regular hours <> 40. The “Not 40” warnings are simply notifications to you and can be ignored if in fact you worked regular hours outside your standard hours.

Resort Data

By clicking on the column header, you can resort the data for your viewing preference.


Timecard Information Custom
Main | Status

View Timecard	Template	Rcd #	Timecard Group	Run ID	Empl Approval	Dates
View Timecard	Template	0	FIN	0726		12/16 - 12/22
View Timecard	Template	0	FIN	0726		12/9 - 12/15
View Timecard	Template	0	FIN	0725		11/25 - 12/1
View Timecard	Template	0	FIN	0725		12/2 - 12/8
View Timecard	Template	0	FIN	0724		11/11 - 11/17

Timecard Information Custo

Main | Status

View Timecard	Template	Rcd #	Timecard Group	Run ID	Empl Approval	Dates
View Timecard	Template	0	FIN	0717	☑	8/12 - 8/18
View Timecard	Template	0	FIN	0717	☐	8/5 - 8/11
View Timecard	Template	0	FIN	0718	☐	8/19 - 8/25
View Timecard	Template	0	FIN	0718	☑	**8/26 - 9/1**

Steps to fill out your Timecard

Here are the general steps that you need to follow to enter in your timecard. See specific documentation below to see how to do each step.

1. Click on the View Timecard Link to open your timecard for a given week.
2. Enter in time on the Standard Tab
3. Add a new line or use the ones that are there from your template
4. Select Account Code from drop down list
5. Select Activity Code from drop down list (if needed)
6. Select Earning Code from drop down list
7. Select Rate ID from drop down list (if you notified of this)
8. Enter in hours from Sunday through Saturday
9. Go to the Comments tab. Enter in comments that are needed for specific earning codes or select from the drop down list of comment options.
10. If you are entering in earning codes that need to have punch times, then enter in the punch times. The main required punch times are for Overtime and Comp Time earned.
11. Click on the Employee Approval check box in the upper right hand corner of the page when you are finished.
12. Click on Save button on the lower left hand side or in the left middle of the page.
13. Click on the Return to My TC Home link to go back to the summary page.

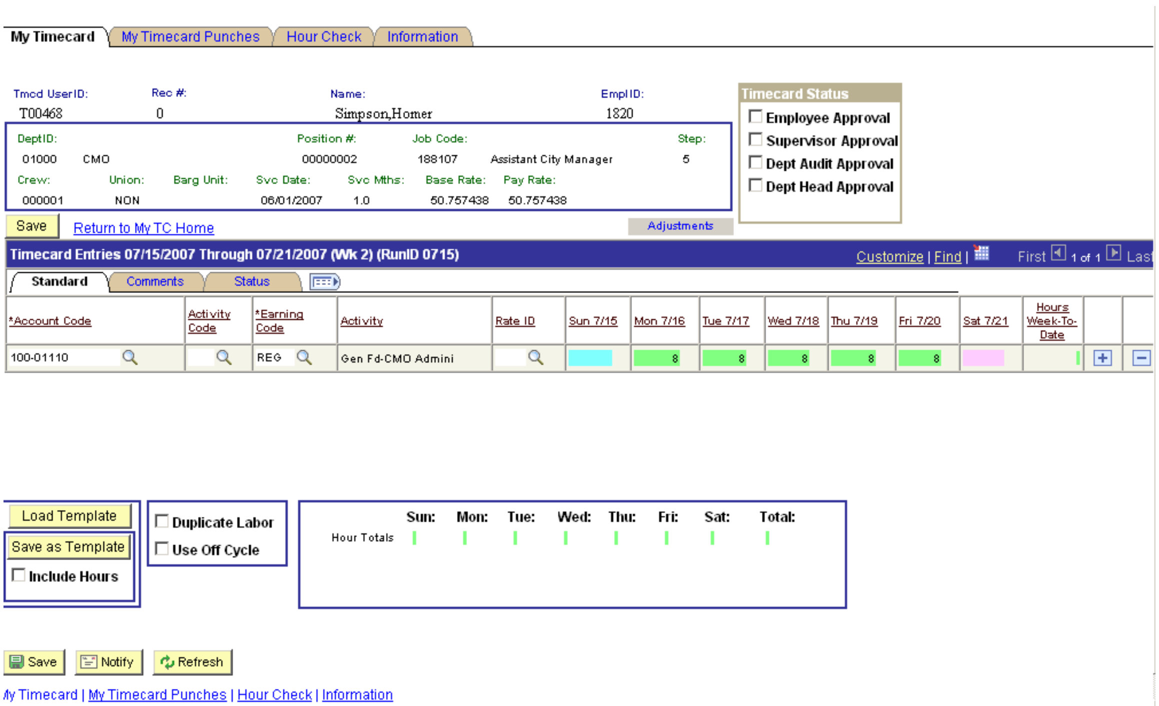
Filling out your Timecard

When you click on View Timecard link, it will take you to the individual timecard for one week. This is where you fill out your timecard information. You can also view your accrual information and other benefit information.

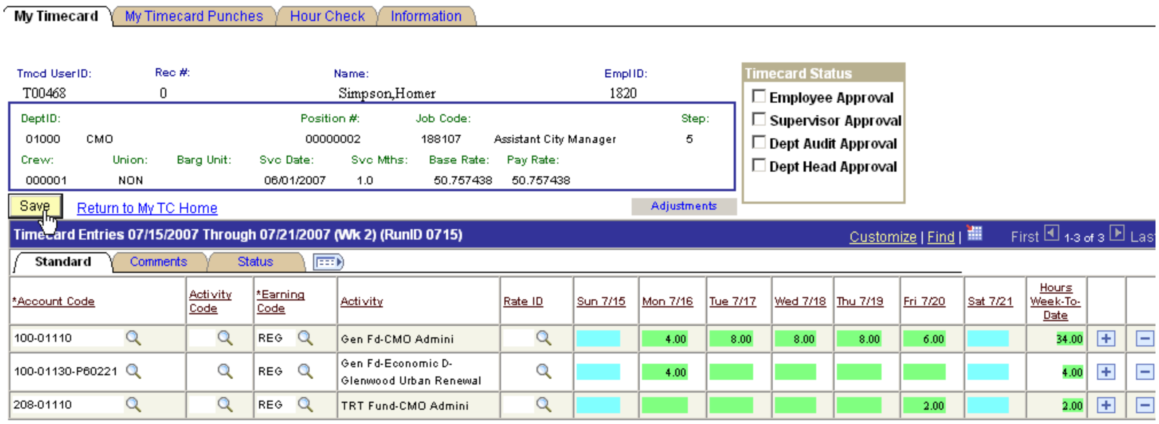
If you will be gone when your timecard it due and you have not filled it out, your supervisor will fill out your timecard for you. You can then approve the timecard later.

Not filling out or approving your timecard WILL NOT stop you from getting paid. There are checks and double checks to make sure that all employee time is entered.

My Timecard – Main Tab



Example of timesheet w/ multiple account codes already filled out



Note: Use the "Return to My TC Home" link to return back to the summary page.

Moving to a new field

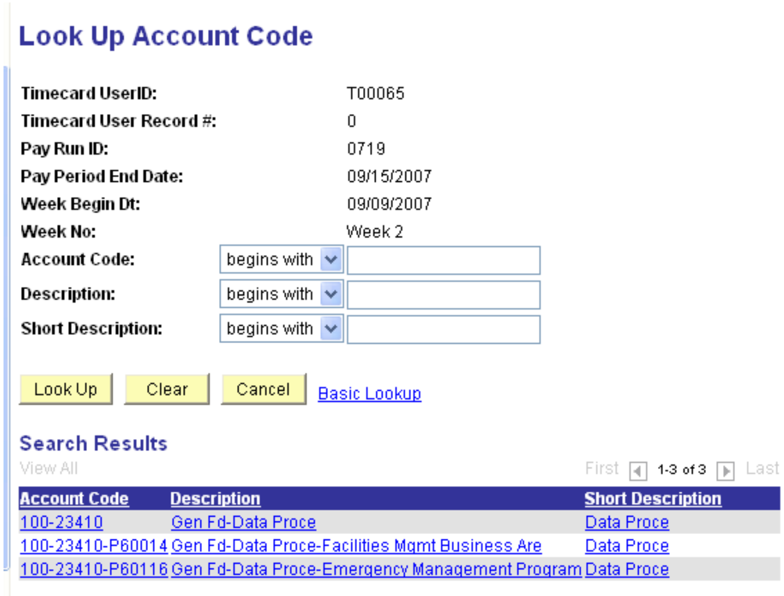
Press the tab key to move to the next field or use your mouse to click into the field.

Adding/Removing Lines to your timecard

To add or remove a line to your timecard, use the + − buttons located at the right hand side of your timecard entries.

Account Code

Select an account code by clicking on the look-up Prompt . The account code is what account you want to charge your hours to. Account codes are assigned to users by the department administrator. Contact them if you do not have access to an account code that you need to use. When you go into your timecard and you have not set up a template, it will come up with a default account on the first timecard line. If there isn't an account on the first line, contact your department admin person to add a default account for your profile.



Account Code	Description	Short Description
100-23410	Gen Fd-Data Proce	Data Proce
100-23410-P60014	Gen Fd-Data Proce-Facilities Mgmt Business Are	Data Proce
100-23410-P60116	Gen Fd-Data Proce-Emergency Management Program	Data Proce

Click on the link with appropriate description under “Search Results” to select the account code.

Allocate and PW Allocate

You may have two special account code options, Allocate or PW Allocate. These are used to split out your time to several different accounts.

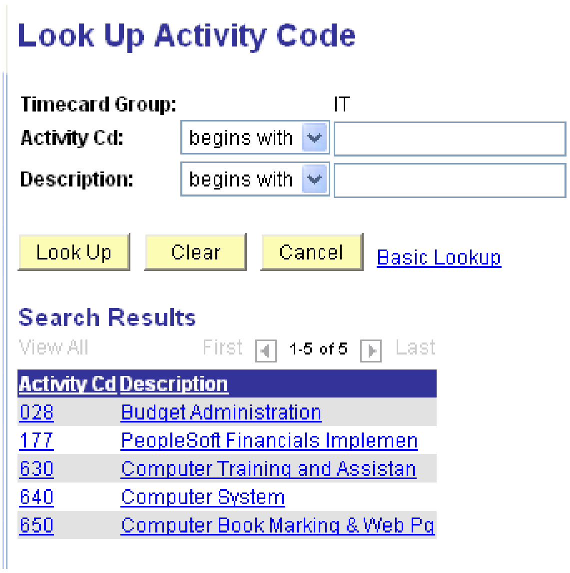
The Allocate code is based on your budgeted time allocation that is in payroll, not everyone has this allocation.

The other is a department specific allocation that is used in Public Works. This is based on your last 4 weeks of time and selects the top 3 accounts that you have charged to. This is used mainly for vacation and sick allocation. If you are a new employee, you should not use this option for the first 4 weeks of employment.

If you are using Allocate, you should not be using PW Allocate. If you use PW Allocate, you should not be using Allocate.

Activity Code

Select an Activity Code by clicking on the look-up Prompt This is a description field that is assigned to specific jobs where time is tracked per your department head. The activity code is determined by departments or divisions. Your supervisor will notify you if you should be using activity codes.



Look Up Activity Code

Timecard Group: IT
Activity Cd: begins with
Description: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

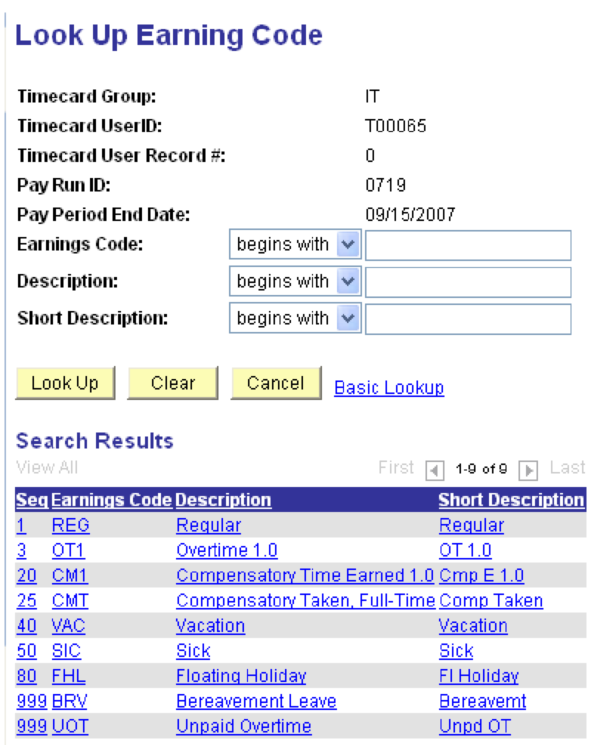
View All   First 1-5 of 5 Last

Activity Cd	Description
028	Budget Administration
177	PeopleSoft Financials Implemen
630	Computer Training and Assistan
640	Computer System
650	Computer Book Marking & Web Pg

Click on the link with the appropriate description under “Search Results” to select the activity code.

Earning Code

Select an Earnings Code by clicking on the look-up Prompt that is applicable to the hours you are entering (i.e. “REG” = Normal Worked hours, “VAC” = Vacation, etc.)



Look Up Earning Code

Timecard Group: IT
Timecard UserID: T00065
Timecard User Record #: 0
Pay Run ID: 0719
Pay Period End Date: 09/15/2007
Earnings Code: begins with
Description: begins with
Short Description: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

View All   First 1-9 of 9 Last

Seq	Earnings Code	Description	Short Description
1	REG	Regular	Regular
3	OT1	Overtime 1.0	OT 1.0
20	CM1	Compensatory Time Earned 1.0	Cmp E 1.0
25	CMT	Compensatory Taken, Full-Time	Comp Taken
40	VAC	Vacation	Vacation
50	SIC	Sick	Sick
80	FHL	Floating Holiday	Fl Holiday
999	BRV	Bereavement Leave	Bereavemt
999	UOT	Unpaid Overtime	Unpd OT

Click on the link with the appropriate description under “Search Results” to select the earning code.

If you are an exempt employee and you work overtime, it is up to your department on whether you should record the extra hours under UOT, Unpaid Overtime.

If you are working overtime and get paid 1.5 for each hour you work over, enter in the 1 hour that you worked. The system will calculate your pay at 1.5 for you.

If you are a new employee and have not worked for six months yet, you will get a message when you try to enter in a vacation earning code. The message will say "You have to be here 6 months before you can use vacation." If you have gotten vacation hours as part of your sign on bonus, please notify your department admin person that you should be allowed to use vacation hours in the first six months of your employment.

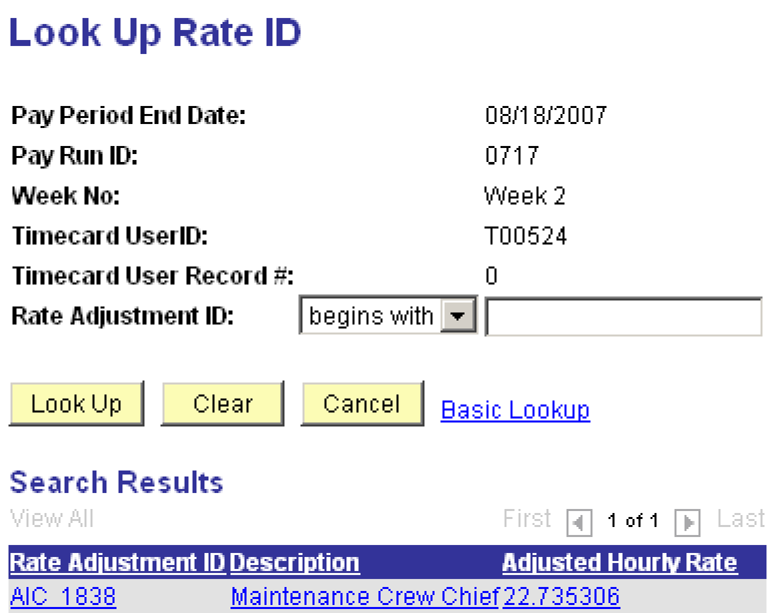
Activity

This displays the descriptions of the account code and the activity code. You can then make sure you are using the right codes by name and not just the number.

Rate ID (AIC)

If you are working Out of Class (ie: AIC), you may have to apply a different rate value for the hours you work. Example, you typically make $10/hr, but are working another job that pays $12/hr. Your department administrator will setup a “Rate Adjustment ID” for you to use to apply the $12/hr to hours you enter on your timecard. Access the Rate-ID’s that is available to you by pressing the Prompt . If you do not see a rate code listed, contact your department administrator.

If you are only getting AIC for a couple of days and you put in hours for the whole week on the line you have the rate id, the system is smart enough to know what days you will be receiving AIC. It will calculate and process the additional amounts correctly.



Click on the link with the appropriate description under "Search Results" to select the rate id code.

Hours Fields

Enter the amount of hours for each day to apply to the given "Account code /Earnings-code/Rate-ID" combination you have entered. Each week is from Sunday through Saturday. If you start on Saturday night at 11pm and finish your shift at 7am on Sunday, it is up to your department on whether the time is tracked on Saturday or Sunday.

If you are working a fraction of an hour, you need to enter it in according to a percentage of an hour.

45 minutes = .75 hour
30 minutes = .5 hour
20 minutes = .33 hour
10 minutes = .17 hour
5 minutes = .08 hour

You need to enter in actual worked hours. If you get paid time and a half for overtime, you need to put in actual hours worked not the hours you will be paid for.

If you are an exempt employee and you work overtime, it is up to your department on whether you should record the extra hours under UOT, Unpaid Overtime.

Hours Week-To-Date

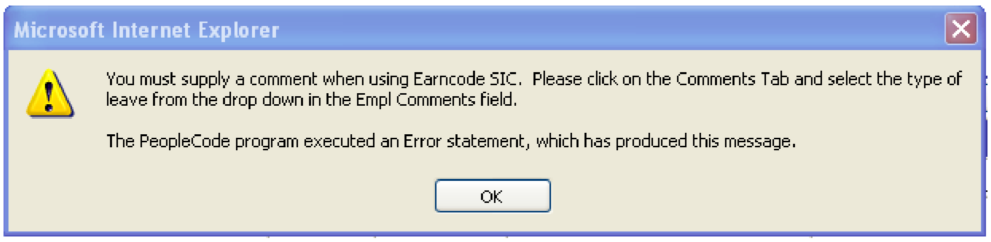
This display field shows you how many hours you have entered in this week for each line. This field does not update until after you click on the save or refresh button.

Comments Tab

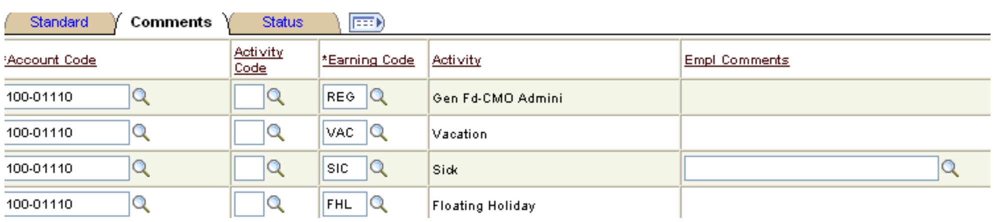
For certain Earnings-codes, comments will be required. Comments for SIC, BRV (bereavement), and INJ (injury) are the only ones required at this time.

SIC comments

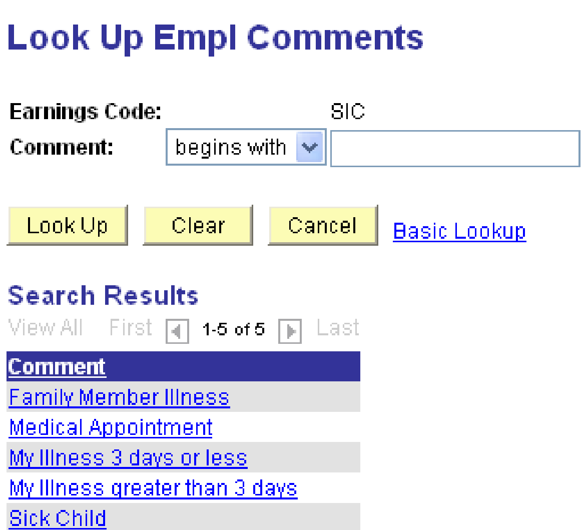
If you enter in SIC as an earning code, you must enter in comments for that sick time. It will not let you save the timecard until you enter in the comments. If you try to save before you enter in the comments you get the error below.



Click on the OK and the program will move you to the Comments tab. You will then see the Account code, Activity Code, Earning Code, Activity and the Empl Commments Field.

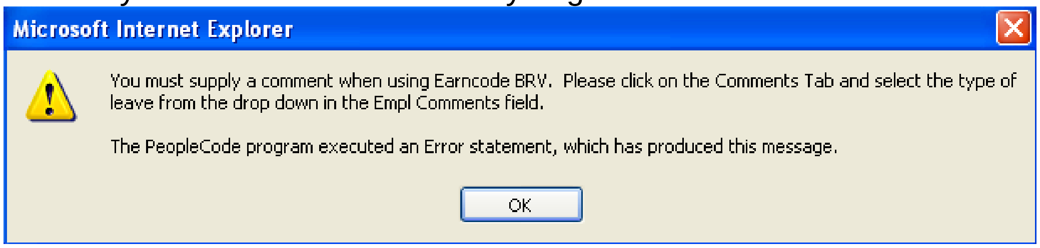


Click on the prompt on the empl comments. It will give you 5 Options. Click on the comment that suites your sick time the Best.

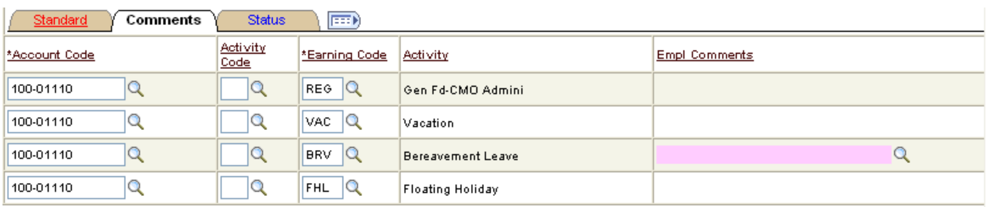


BRV comments

If you enter in BRV (bereavement) as an earning code, you must enter in comments for that time. It will not let you save the timecard until you enter in the comments. If you try to save before you enter in the comments you get the error below.



Click on the OK button to go to the Comments tab. You will then see the Account code, Activity Code, Earning Code, Activity and the Empl Commments Field.



Click on the prompt on the empl comments. It will give you several options. Click on the comment that matches who you took bereavement for. Note that there are several options that are only for specific unions. Please only use the general ones or the ones for your union.

Look Up Empl Comments

Earnings Code: BRV

Comment: begins with

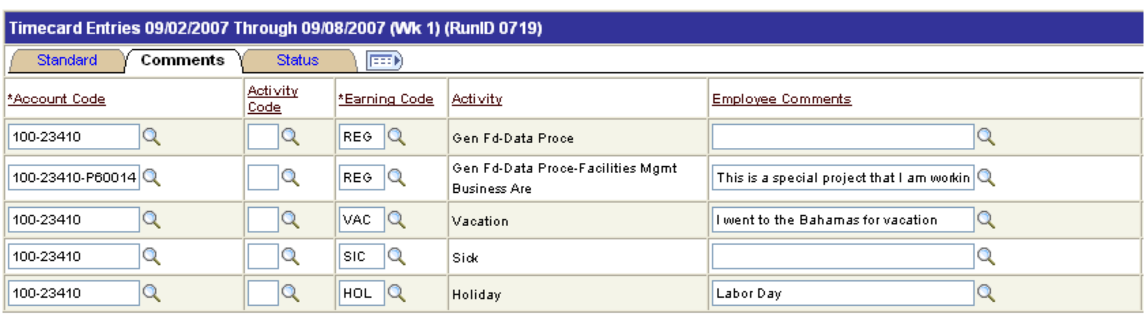
Look Up | Clear | Cancel | Basic Lookup

Search Results

View All   First   1-18 of 18   Last

Comment
AFS - In Loco Parentis
AFS - Other Close Relative
AFS - Other Resident in House
AFS - Pall Bearer - 4 Hours
Brother
Daughter
Grandparent
IAF - Other Relative in House
OPE - Dom Partner Same Sex
OPE - Other Resident in House
OPE - in loco Parentis
Parent
Parent-in-Law
SPA - Other Relative in House
Sister
Son
Spouse
Step-Child

Other Comments



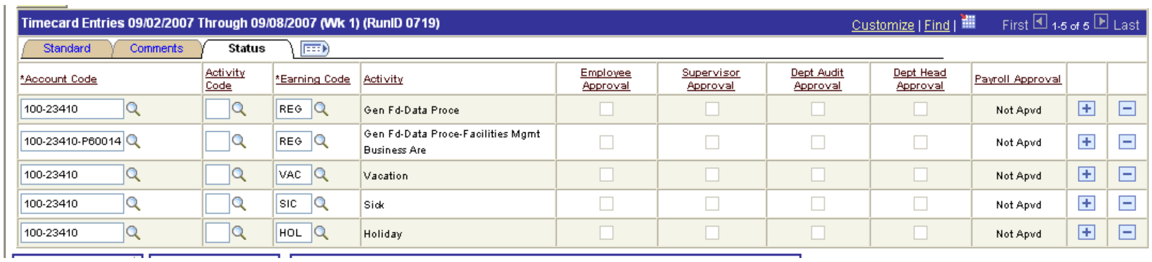
Timecard Entries 09/02/2007 Through 09/08/2007 (Wk 1) (RunID 0719)

Standard | Comments | Status

*Account Code	Activity Code	*Earning Code	Activity	Employee Comments
100-23410		REG	Gen Fd-Data Proce	
100-23410-P60014		REG	Gen Fd-Data Proce-Facilities Mgmt Business Are	This is a special project that I am workin
100-23410		VAC	Vacation	I went to the Bahamas for vacation
100-23410		SIC	Sick	
100-23410		HOL	Holiday	Labor Day

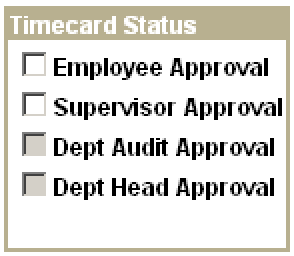
You can enter in comments for any other earning line. Click on the Comments tab and enter in under Employee Comments column and comments that you feel is important for this earnings line.

Status Tab



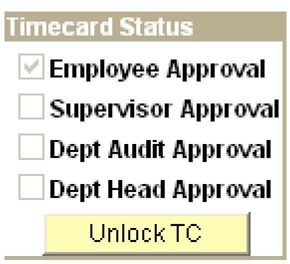
The Status Tab shows you what approval has been checked on your timecard.

Employee Approval



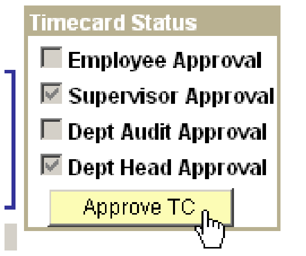
Use the “Employee Approval” check-box to approve your timecard for the week when you have completed entries for it and are satisfied it accurately reflects your hours for the week. If you check the Employee Approval check box, it then automatically saves your timecard and locks it for further entry.

Unlock TC



Once you approve your timecard, it will display an Unlock TC button. When you approve your timecard, it locks it from any more entry. If you decide that you have made a mistake and want to go back and change it before the supervisor approves it, you need to click on the Unlock TC button to unlock your timecard. Once the supervisor has approved your timecard, you will not be able to unlock your timecard.

Historical Timecard Approval



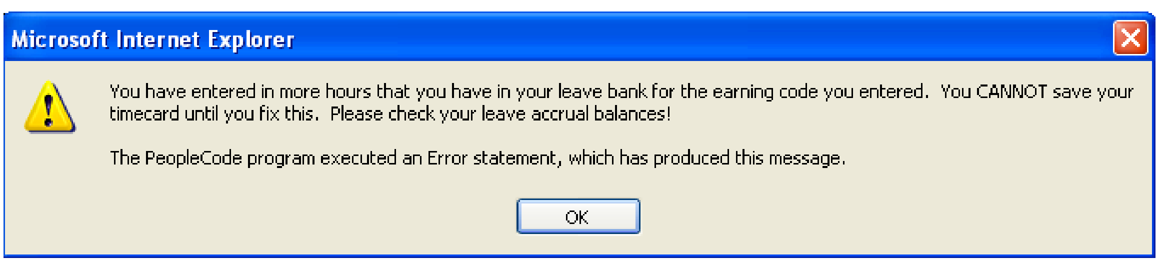
There may be times where you will be unavailable to approve your timecard before payroll is processed. Your supervisor will do their approval and send your timecard on to the Dept. Head. Once you return to work, go into the timecard you need to approve and click on the Approve TC button to "electronically" sign your timecard.

Save Button

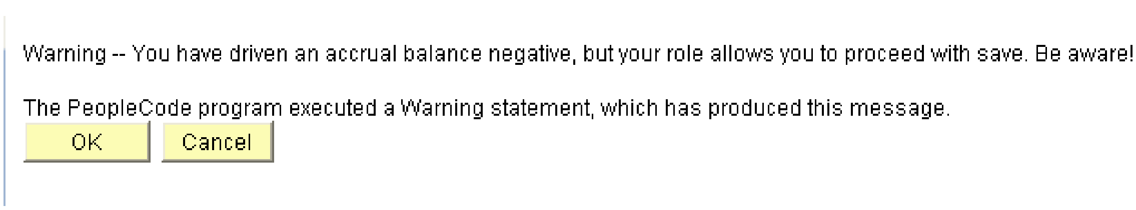
There are two save buttons on the page, one in the middle of the page and one at the bottom. They both work the same to save the entries you have made. The keyboard keys to Save is ALT + 1.

Error Message for Leave Accruals

If you have entered in sick, vacation, or any other leave accrual hours that cause you to go in the negative, you will get the message below. You will not be able to save your timecard until you correct it.



If you are a firefighter you can have your vacation go in the negative because you have your 5L bank of hours that you are accruing this year. If you are Police you can have your floating holiday amount go in the negative. You will get this message below. You can save your record but you will get the warning.



Notify Button

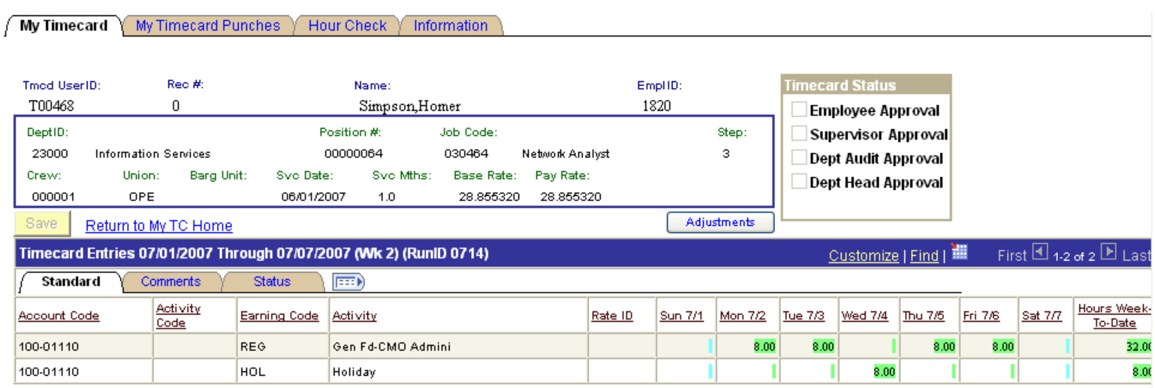
The notify button is used by the supervisors to notify you if they change your timecard. When you click on the notify button it gives you another page to email information to an employee. You will probably not be using this option.

Refresh Button

The refresh button will update the display fields on the page. For example when you enter in time, the hour totals do not display the hours you just entered. You need to click on the refresh button to update the display area.

Holiday Timecard Line

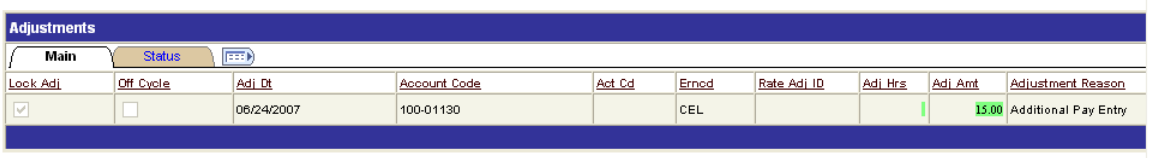
There are several holidays throughout the year. All of the holidays are defined on a table by payroll. If a holiday is given to you through a contract or City policy, that holiday will be automatically populated on your timecard when you enter it. Do not remove this line or you will not be paid for the holiday. If you are working a holiday and then taking another day off through an agreement with your department, you need to record the days that you actually worked. You will then need to record the holiday day when you actually took it. Parttime employees will be receiving prorated holiday pay line.



Buttons & Other features on Timecard Page

Adjustments

You department administrator may use this editor to make adjustments for you. If the button-text appears bold and in red, then there are adjustments entered and you can view them by pressing the button. Some of the adjustments that may be added are forgotten overtime, sick used rather than vacation, missed AIC day, etc. This is a display only page.



Save as Template

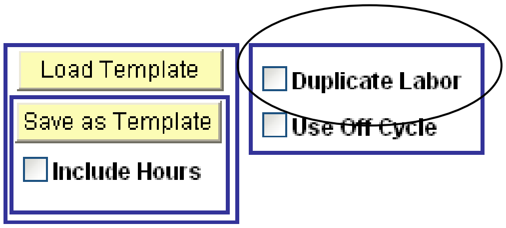
Press this button to save the timecard-information you have entered this week to your "Timecard Template". The template will automatically populate your timecard each week when you create a new timecard.
Use the "Include Hours" to save your current hours entered out to the template. Be sure that you only save hours in REG time. You should not save hours in the SIC or VAC earnings code line, as those change from week to week and it won't allow you to save it with hours in it.
See more documentation below

Load Template

Press this button to refresh it from your template you had saved. You would want to do this if you had entered several entries and you feel that you have all the wrong information in your timecard and want to just start over. You need to delete all of the rows first before you load the template in.
See more documentation below.

Duplicate Labor

Duplicate labor is a convenience feature for users who need to "copy-down" the line above. Click on the Duplicate Labor box on the bottom left of the page to turn this on for this timecard. Click on the "+" next to the line you want to copy. It will then create a new line with the same codes as the line above. An example is you worked 2 hours on a specific account code and you worked the 2 more hours with a slight change in the account code. With this feature checked on, you just click the "+" next to the line you want to copy and it creates a new line with the same codes. Then you just have to update the account code.

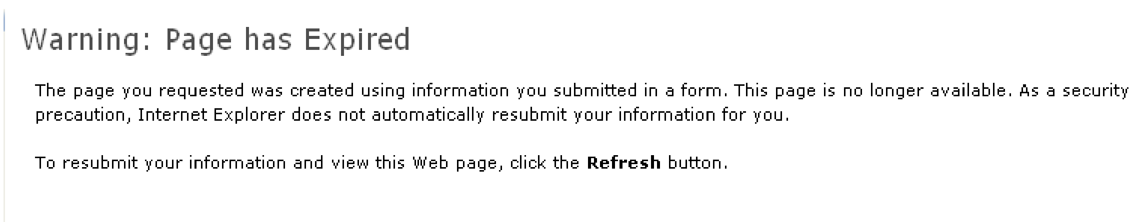


Hours Totals box

This information shows you a summary of the hours that were entered for each day. Like the box Hours week-to-date sums the hours across, the Hours Totals sum the hours down for each day.

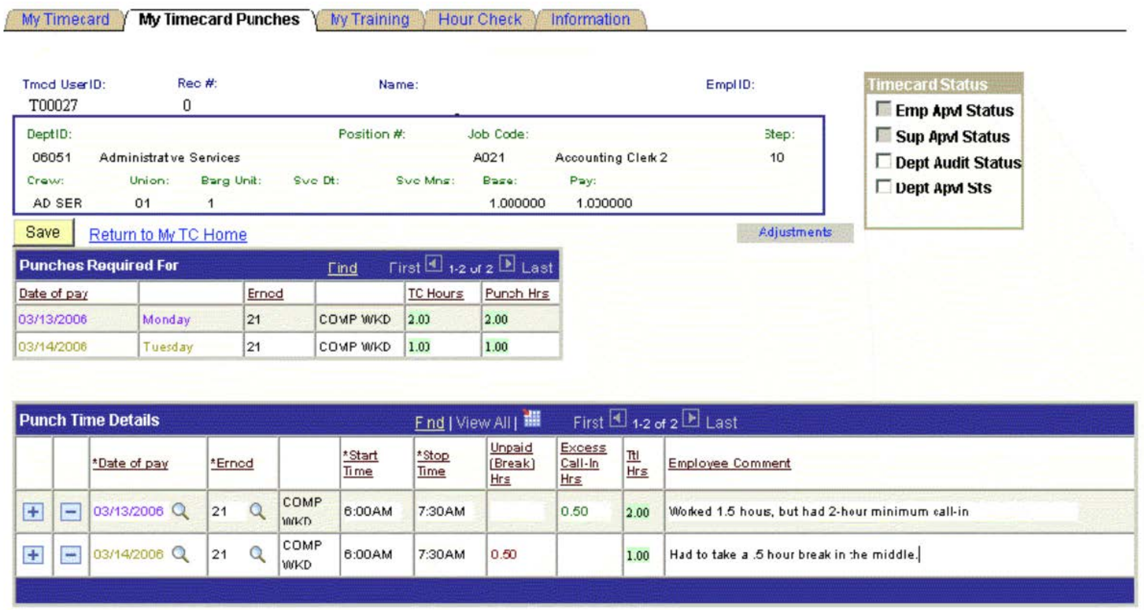
Back Button

There is the back button to navigate on the internet. PeopleSoft does not hold previous pages like most internet sites do. You can not use the Back Button to go back several pages in PeopleSoft. If you do, you may get the message:



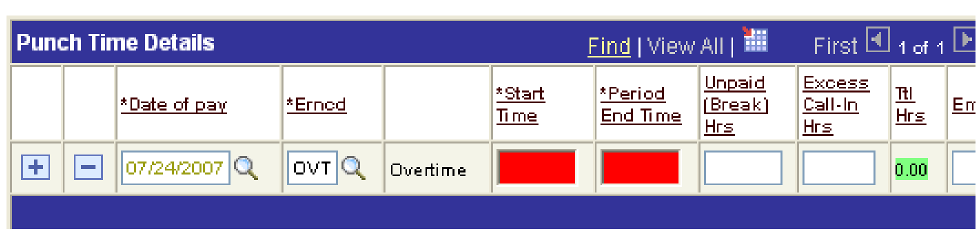
You can either click on the Refresh button to go back to the last page that it can accept or you can click on the navigation on the left hand menu to go back to where you started.

My Timecard Punches tab (If Available to you)



General Information

The "My Timecard Punches" tab allows you to track "Punch in" and "Punch out" times for certain earning codes. In addition, some departments REQUIRE punch tracking for some earning-codes like overtime and comp-time earned. The top box just gives you information about you and your position and job you are working in. If you try to save your timecard and you are required to enter in punch times, it will move you over to the My Timecard Punches page and give you this message.



Punches Required For

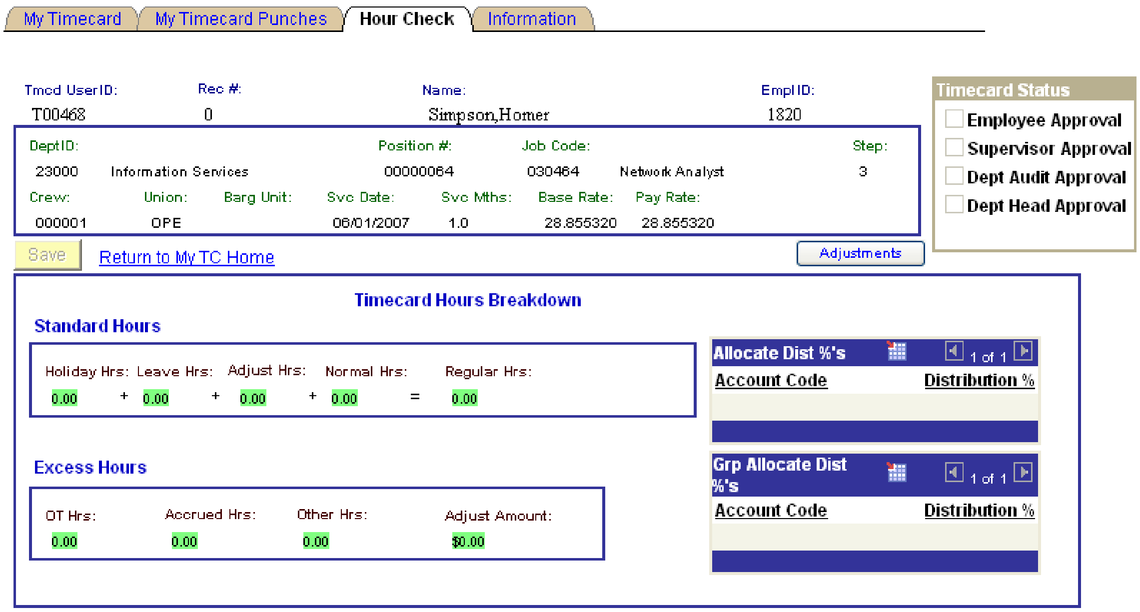
This grid-box displays any days and earning codes for-which time reported on the timecard require punch entries. Days are color-coded to make it easier to find entries in the Punch Time Details grid below. When you first go to this page, the Punch Hour's field will be 0.00 until you put in the punch times in the Punch Time Details.

Punch Time Details

This grid is used by the user to enter their "In" and "Out" times.

Date of Pay - Specify the Date the punches occurred. This is automatically filled in.
Earn Code - Specify the Code for which the punches are associated. This is automatically filled in.
Start-time – Specify the start-time of the punch. You can enter this in military or standard time. To enter in military time use the 24 hour clock (0600 or 2100). If you are entering in standard time then use the 12 hour clock with an A or P after the time (6A or 9P or 1:30P)
Stop-time – Specify the ending time of the punch.
Unpaid (Break) Hours – Specify in hours the amount of time between punches that does not count (Unpaid lunch, etc)
Excess Call-in Hrs – Specify any hours that the employee receives outside of the punches for call-in minimums, etc.
Total Hours – Calculated total of hours for the entry and it is entered into the Punches Required For Punch Hours field.
Employee Comment – An optional comment about the entry.

Hour Check Tab



General Information

Use the "Hour Check" tab to double-check you hours entry to see that things are coded correctly. This page is display only.

Standard Hours

Standard Hours are made up of Holiday pay, Leave hours, Adjustments to Standard Hours, and Regular Hours. These hours will typically total to 40, unless you are a part-time worker, have a flex schedule, or other odd activity that may cause you to legitimately have over or under 40 hours. If your Standard hours do not total 40, you will receive a “Not 40!” warning to alert you to possible errors.

Excess Hours

Excess hours can consist of Overtime Hours, Accrued Hours (Comp-time), Other Hours, or Adjustment Amounts.

Allocate Dist %’s

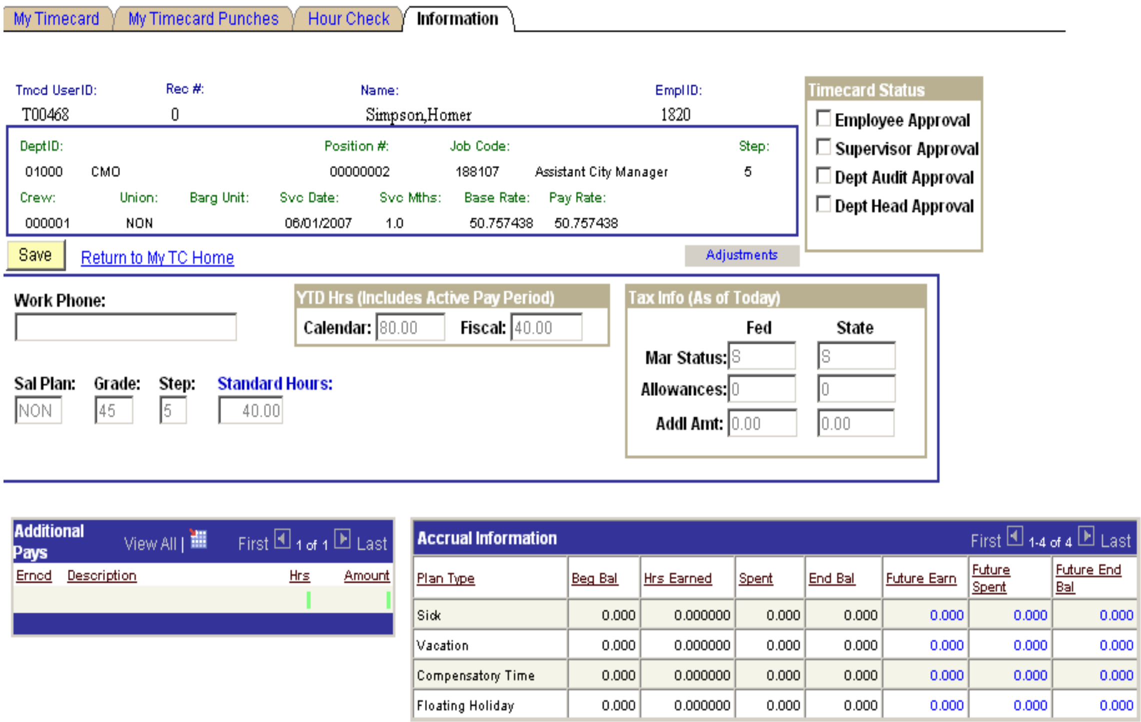
This Allocate distribution box will display your allocation if you are budgeted to be allocated between several accounts for a percentage. Employees should know if they are allocated. On your timecard, you will select Allocate instead of an account code string to allocate your hours. This is where you can see what accounts your time will be allocated to.

Grp Allocate Dist %'s

Group Allocation Distribution is different than Allocate. This allocation is used specifically for the Public Works department. The way this allocation works is to look at your time over the last 4 weeks of timecards. It then adds them all together and looks at the top 3 projects that you worked on. It then will allocate your time based on those accounts. This is mainly used for vacation and sick account allocation. If you are a new employee, you will not use PW Allocation for the first month you are here as you are not allowed to use vacation or sick leave. If you have vacation front loaded from a sign on bonus, do not use the PW allocate until you have been here over a month.

Information Tab

The information tab is only to give you information. You cannot enter any data into this page.



General Information

The Information tab provides you with a variety of information about your position, job and leave accruals.

YTD Hours

This represents how many hours you have worked this year as of the beginning of the year. It DOES NOT include hours you have entered for the current or future pay-runs, only what has processed through payroll already.

Tax Info (As of Today)

This represents your tax settings in the system as of the date you look at it. Even if you are viewing a historical timecard, the Tax Info is as of present. It shows what you have setup for your W-4. It is separated by Federal and State and shows you your Marital Status, the allowances you have claimed and if there is any additional amount that you are having taken out for taxes.

Additional Pay

If you receive additional pay, your additional pay information should display here. For example, Cell phone allowance, auto allowance, incentive pay, uniform allowance, etc.

Comp Time Information

If you have and/or currently earn comp-time, information about those hours will display here.

Accrual Information

If you are eligible for Accruals then any activity in these accounts will be displayed in this area.

Accrual Plans:

- Sick
- Vacation
- Compensatory Time
- Floating Holiday
- Police Holiday – Police only
- Vacation Leave Accrual Fire – Fire only
- Smoothing Fire Bank – Fire only

Information:

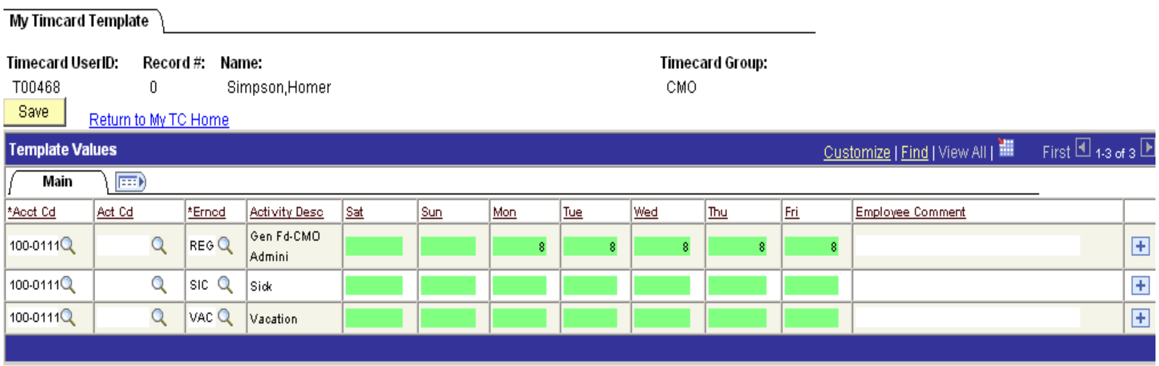
- Plan Type – this lists all of the plan types you have available for leave accruals
- Beginning Balance – this is the current balance you have at the start of this period
- Hours Earned – this show how many hours you earned for comp time that you have entered. It will not show you the hours you earned through sick, vacation, floating holiday, etc
- Spent – this shows you how many hours you entered to use this pay period for this leave accrual
- End Balance – this is the ending balance of beginning hours + hours earned – spent
- Future Spent - this will show you any hours you have entered in future timecards to use for this accrual
- Future End Balance – this is the ending balance for the future. It takes End Balance – future spent

Accrual Information First 1-4 of 4 Last

Plan Type	Beg Bal	Hrs Earned	Spent	End Bal	Future Spent	Future End Bal
Sick	286.910	0.000000	0.000	286.910	0.000	286.910
Vacation	458.924	0.000000	32.000	426.924	0.000	426.924
Compensatory Time	80.000	0.000000	60.000	20.000	0.000	20.000
Floating Holiday	0.000	0.000000	30.000	-30.000	0.000	-30.000

Timecard Template

The Timecard Template is a tool that an employee can use to simplify their timecard entry. If you have created a template for yourself, then it will automatically be entered for you each time you enter a timecard page to put in your time. You could then enter only exceptions in your actual timecard if needed to complete your timecard efficiently. You can also use the template as a starting point by having most of the information you need to enter in your timecard.



General Information

Your template can be reached from your My Timecard Home page. You can only save one template. If you want to create a new template, you create your timecard and then save your template again.

Columns

The columns in the template should be the same as those found in your timecard except there are a few columns that are only entered in at the timecard page so they will not show here in the template.

Hour Information

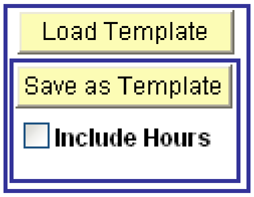
Hours are optional. It is perfectly acceptable to create a template of the Account codes, earncode, etc that you typically use during a week, but wait until the actual timecard to enter the hours. Do not enter any hours in your template for sick or vacation. You should only save hours to your template for regular hours.

Save Template

Click on the Save button in the template page to save this template. You only have one template. If you have a template already, it will give you a message asking you if you would like to overwrite the current template.

Load Template

The load template button is located on the My Timecard page on the bottom left. The Load template button is used to reload your template if you have messed up entering in your timecard and want to start over again. In order to load your template if you have entered in hours already, you need to delete all of the rows. It will not load your template if you have rows and hours in.

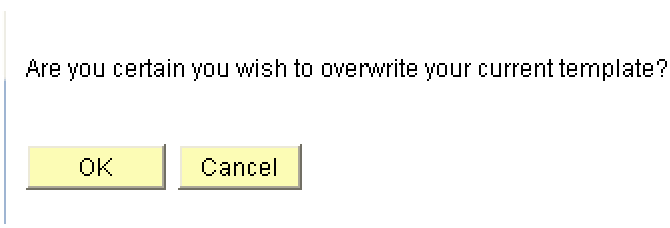


Save as Template

This button will save the current timecard that you are viewing as your template. You may want to do this when you have changed account codes and want to start using a new template to start your timecard entry.

The Include Hours button allows you to save your new template with the hours that you have entered. If you do not check this button, it will only save the template with the account codes, earnings codes, etc and not any hours.

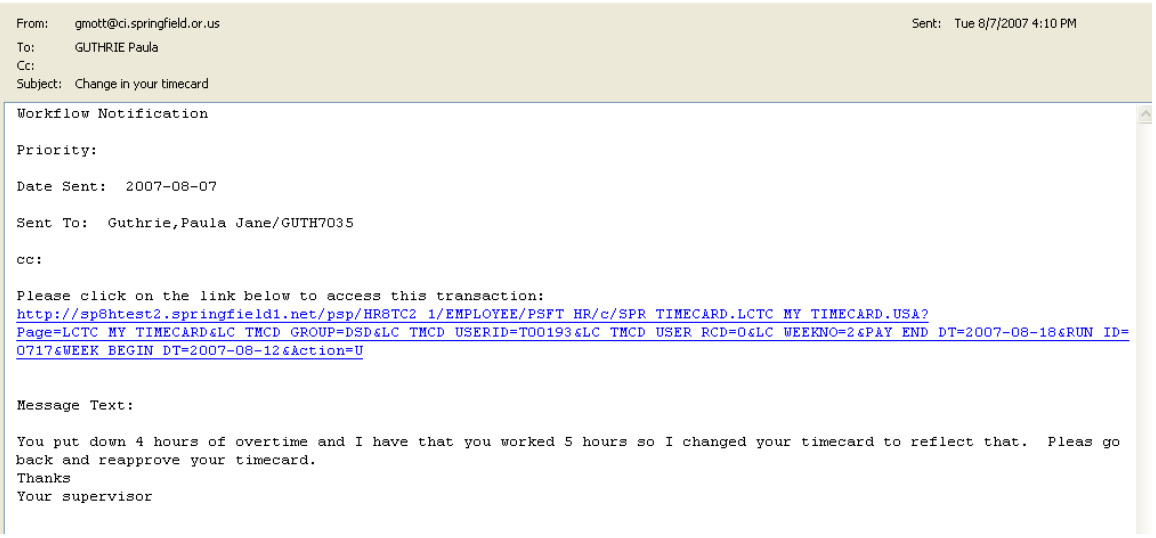
You only have one template. If you have a template already, it will give you a message asking you if you would like to overwrite the current template.



Timecard Changes by Supervisor

Notify

There are times when you timecard may be changed by your supervisor or department head. When there is a change, your employee approval check box is unchecked. This is one way you will be able to see if anyone has changed your timecard. The supervisors and department heads besides changing your timecard will send you an email to notify you that your timecard has changed and what the change was. It is your responsibility to go back and reapprove your timecard with the changes. Here is an example of the email that you would receive if there was changes. You can double click on the link and then login and it will take you directly to the timecard in question.


From: gmott@ci.springfield.or.us Sent: Tue 8/7/2007 4:10 PM
To: GUTHRIE Paula
Cc:
Subject: Change in your timecard

Workflow Notification

Priority:

Date Sent: 2007-08-07

Sent To: Guthrie,Paula Jane/GUTH7035

cc:

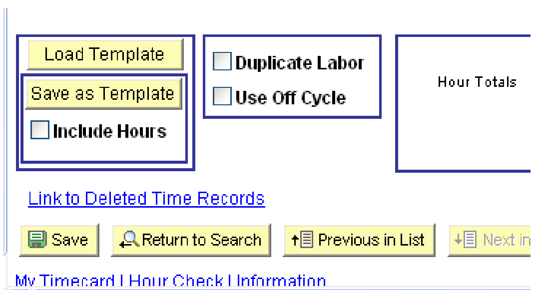
Please click on the link below to access this transaction:
http://sp8htest2.springfield1.net/psp/HR8TC2_1/EMPLOYEE/PSFT_HR/c/SPR_TIMECARD.LCTC_MY_TIMECARD.USA?Page=LCTC_MY_TIMECARD&LC_TMCD_GROUP=DSD&LC_TMCD_USERID=T00193&LC_TMCD_USER_RCD=0&LC_WEEKNO=2&PAY_END_DT=2007-08-18&RUN_ID=0717&WEEK_BEGIN_DT=2007-08-12&Action=U

Message Text:

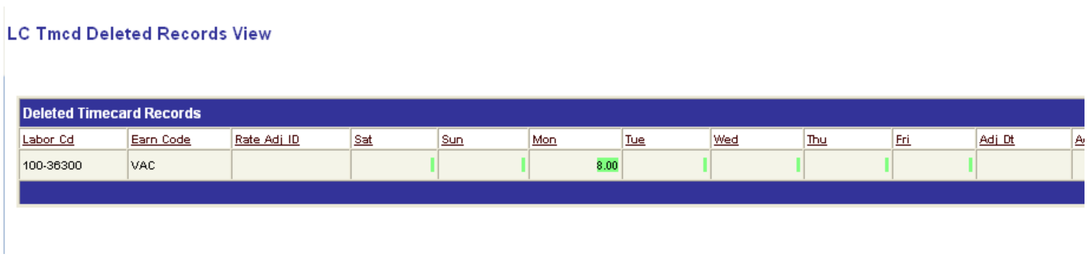
You put down 4 hours of overtime and I have that you worked 5 hours so I changed your timecard to reflect that. Pleas go back and reapprove your timecard.
Thanks
Your supervisor

Supervisor deleted lines

If a supervisor deletes a line on your timecard after you have approved it, there will be a link that shows up on your My Timecard page. It will say “Link to Deleted Time Records.”

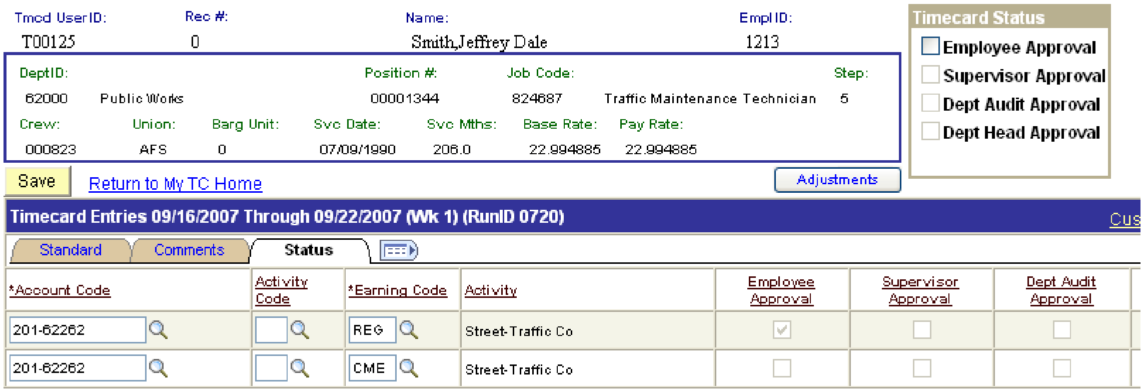


By clicking on that link you will be able to view the lines that the supervisor had deleted.



Supervisor changes lines

If a supervisor changes a line on your timecard, you will be able to see the status before the lines was changes. If you click on the Status tab on My Timecard page, you will see the employee approval check on the line that you had previously approved. The Timecard Status box will not have your Employee Approval box checked.



Tmcd UserID: T00125
Rec #: 0
Name: Smith,Jeffrey Dale
Empl ID: 1213

DeptID: 62000 Public Works
Position #: 00001344
Job Code: 824687 Traffic Maintenance Technician
Step: 5

Crew: 000823
Union: AFS
Barg Unit: 0
Svc Date: 07/09/1990
Svc Mths: 206.0
Base Rate: 22.994885
Pay Rate: 22.994885

Timecard Status

- Employee Approval
- Supervisor Approval
- Dept Audit Approval
- Dept Head Approval

Save | Return to My TC Home | Adjustments

Timecard Entries 09/16/2007 Through 09/22/2007 (Wk 1) (RunID 0720) Cus

Standard | Comments | Status

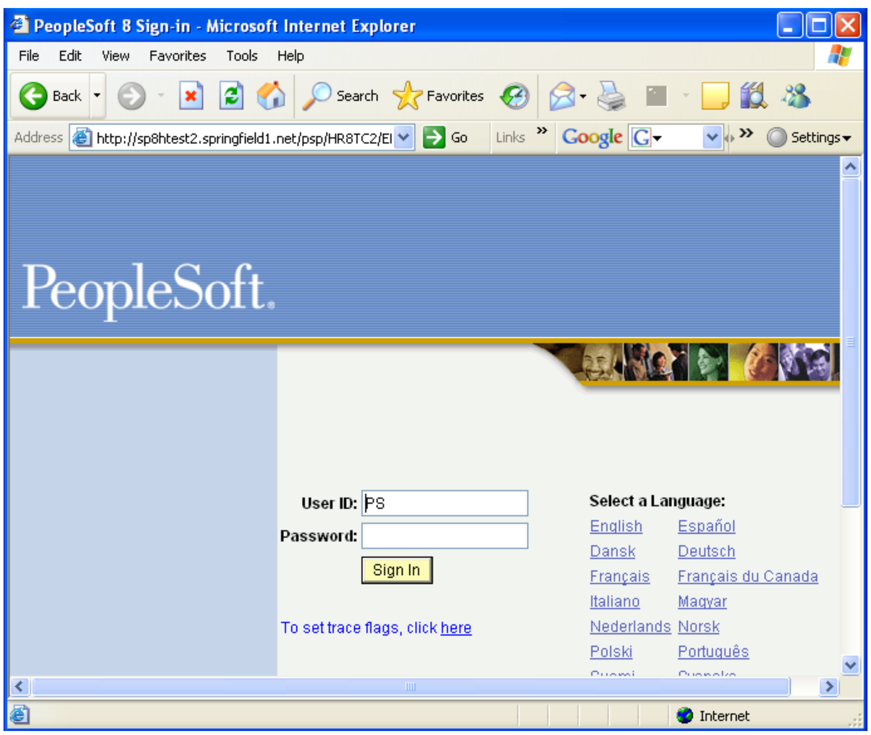
*Account Code	Activity Code	*Earning Code	Activity	Employee Approval	Supervisor Approval	Dept Audit Approval
201-62262		REG	Street-Traffic Co	✓		
201-62262		CME	Street-Traffic Co			

Logging out of PeopleSoft HRMS

1. When you are done working in the PeopleSoft HRMS system and want to logout, follow these instructions.

2. On the right hand top of the page is the Sign out link. Click on that.

3. It will automatically log you out and take you back to the login page.



4. Click on the Red X on the top right of the page. You are now logged out and exited PeopleSoft.

Logging out of the Network

1. Make sure that all your open windows are closed
2. Click on the Start button the left hand bottom of the page.
3. Click on the Shutdown button 

4. It will then give you box that asks "What you want the computer to do?" Make sure that Shut down is the in box by selecting it from the drop down list.

5. Click on OK and your computer will shut down.
6. You are done!!

Accessing your application using the keyboard

Keyboard navigation is controlled by Hot keys and Access keys .

List of Hot Keys

Alt 1 -- Executes different buttons depending on the page type

> Save button on the Toolbar in a page

> OK button on a secondary page

> Search or Add button on a Search or Lookup page

Alt 2 -- Return to Search

Alt 3 -- Next in List

Alt 4 -- Previous in List

Alt 5 -- Valid Lookup Values

Alt 6 -- Related Links

Alt 7 -- Insert Row in grid or scroll area

Alt 8 -- Delete Row in grid or scroll area

Alt 0 -- Refreshes the page by invoking the Refresh button on the Toolbar

Alt . -- Next set of rows in grid or scroll area [e.g., Alt period]

Alt , -- Previous set of rows in grid or scroll area [e.g., Alt comma]

Alt / -- Find in grid or scroll area [e.g., Alt forward slash]

Alt ' -- View All in grid or scroll area [e.g., Alt prime]

**Alt ** -- Toggle between Add and Update on the Search page [e.g., Alt backslash]

Ctrl J -- System Information

Ctrl K -- Keyboard Information

Ctrl Y -- Toggle menu between collapse and expand.

Ctrl Tab -- Toggles focus through the frame set

Enter -- Invokes the following buttons where present: OK, Search, Lookup

Esc -- Cancel

List of Access Keys

Alt 9 -- Takes you to the Help line

**Alt ** -- Takes you to the Toolbar [e.g., Alt backslash Enter]

Ctrl Z -- Takes you to the Search box of the Menu

Menu Access Keys

The Ctrl Z combination will focus your cursor onto the menuing system. From there, you can use your tab key (or shift-tab to reverse direction) to navigate through the menu hierarchy.

About Access keys and Hot keys

> An Access Key is an Alt key combination that moves focus to a specified field on the current page. For example, Alt \ moves focus to first button on the Toolbar. Then pressing the Enter key would invoke that action. Or, you may use the Tab key to move you to the next Toolbar button.

> A Hot Key performs an immediate action. For example, when focus is in a field that has lookup processing, Alt 5 invokes the Lookup page without having to press the Enter key.

SUPERVISOR and

DEPARTMENT HEAD

Time Entry - Training Guide

Created August 2007

Updated 10/10/07

Reaching and Logging on to PeopleSoft HRMS

2. Launch the browser (Internet Explorer) and navigate to Springboard. [http://springboard]

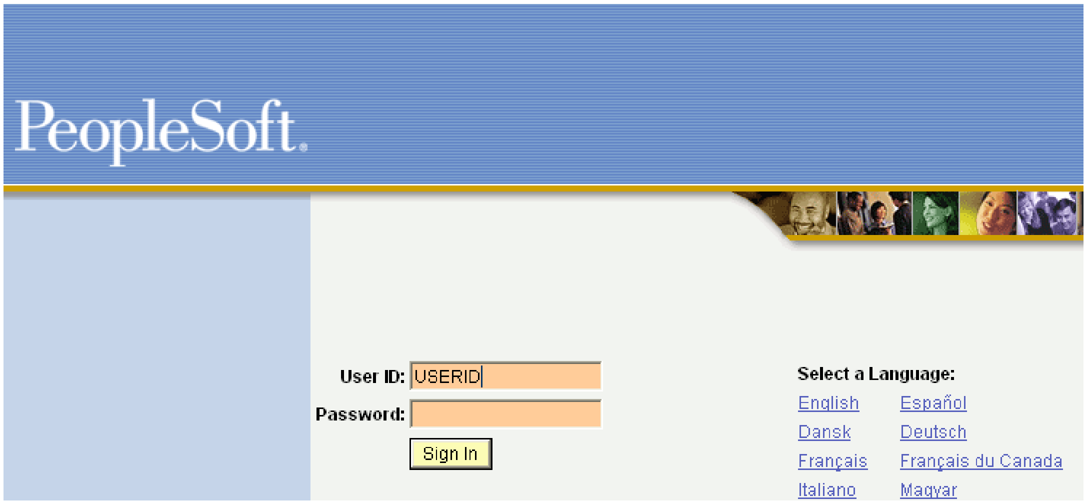
2. From Springboard, you will Select Employee Self Service by clicking on the picture or the [Employee Self Service] text.

The PeopleSoft sign on page should then display and you can sign-on to the PeopleSoft system. Your ID and PASSWORD are entered in UPPERCASE.

Your ID is the first four characters of your last name and the last 4 digits of your social security number.

Your password is assigned to you and you should change it every so often. It is important that you login stays secure because there is lots of sensitive information.

If you attempt to login to the system 3 times incorrectly, you will be locked out of the system. If this happens, or you have forgotten your password, you will need to contact the IT Help Desk at X1234 to have them unlock or reset your password.

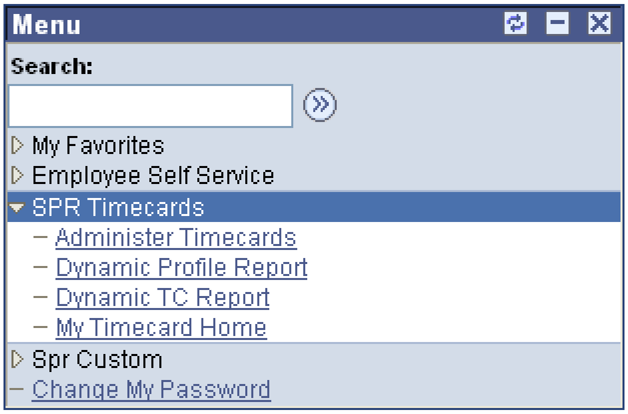


Monitoring and Approving Time for your Employees

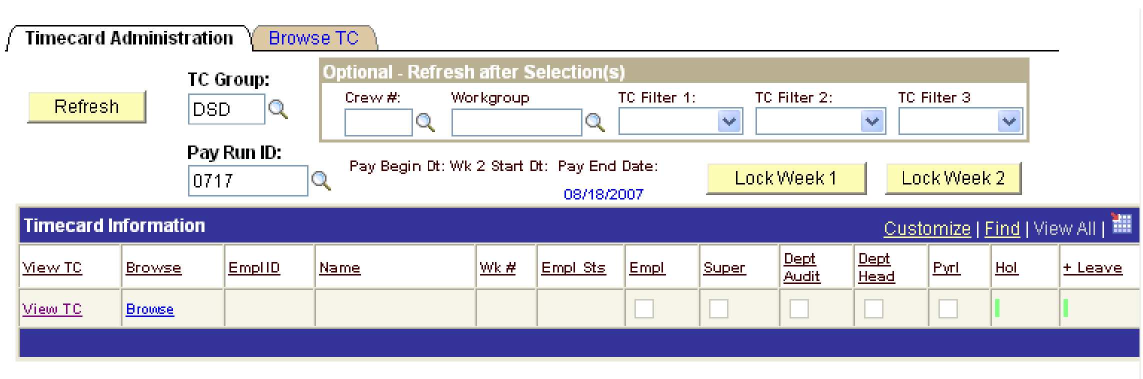
The task of the supervisor in the timecard system is the review and approval of employee timecards. These employees are the ones that are under your direction and supervision. You may be asked to approve timecards for another supervisor if they are not available. You will then be identified in the system as the supervisor backup. If there are any timecards that are not correct, you can change them and then notify the employee that they have been changed. The employee should have approved their timecards before you approve them but it will not stop you from approving them if the employee has not approved it first.

Timecards should be approved every week by Monday.

Using the left-hand navigation menu, click on the SPR Timecards menu and then "Administer Timecards" link.



You will then see the Timecard Administration blank page.



The TC Group should be populated for your department. If it is not, select a TC Group by clicking on the look-up Prompt . You will select your department and it should be the only one that is displayed.

Look Up TC Group

Search by: Timecard Group begins with

Look Up | Cancel | Advanced Lookup

Search Results

View All   First 1 of 1 Last

Timecard Group	Description	Short Description	Status
DSD	Development Services Dept.	DSD	Active

The Pay Run ID should be populated with the active pay run. If not, select an Pay Run ID by clicking on the look-up Prompt . You will select the Run ID for the active weeks that you are approving. The only time you would select a Run-ID other than the active is in the brief window where the previous run is Still Processing and the new Run-Id has started.

Look Up Pay Run ID

Search by: Pay Run ID begins with

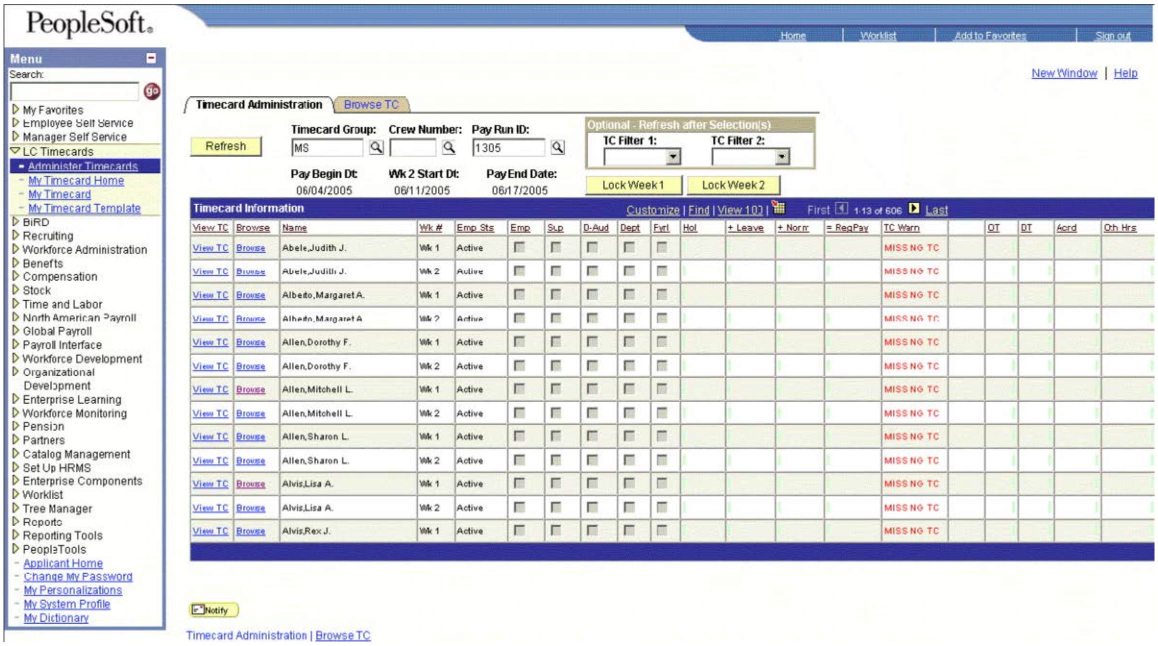
Look Up | Cancel | Advanced Lookup

Search Results

View All   First 1-19 of 19 Last

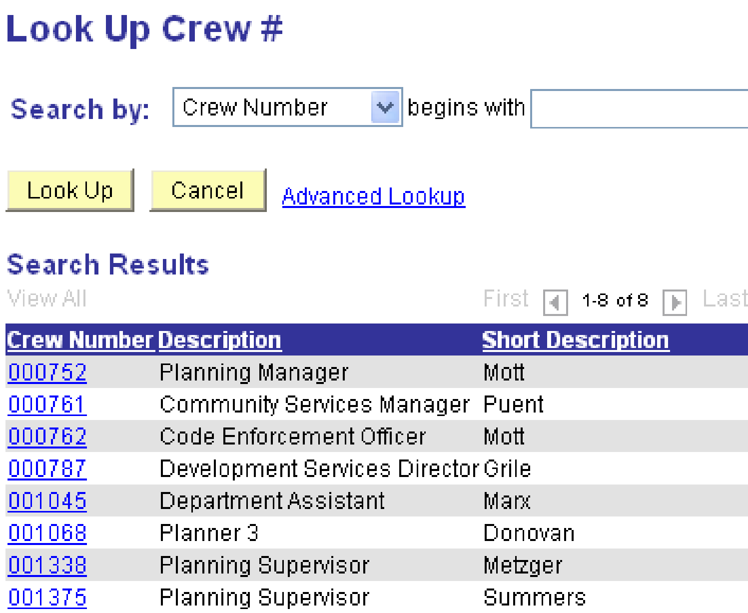
Pay Run ID	Pay Period End Date	Description
0726	12/22/2007	FUTURE
0725	12/08/2007	FUTURE
0724	11/24/2007	FUTURE
0723	11/10/2007	FUTURE
0722	10/27/2007	FUTURE
0721	10/13/2007	FUTURE
0720	09/29/2007	FUTURE
0719	09/15/2007	FUTURE
0718	09/01/2007	FUTURE
0717	08/18/2007	ACTIVE
0716	08/04/2007	PROCESS
0715	07/21/2007	HISTORY
0714	07/07/2007	HISTORY
0713	06/23/2007	HISTORY

Click on the Refresh button and it will then populate the timecards that you have access to as a supervisor or backup supervisor. There are two lines per person because each timecard is for only one week and there are two weeks in a "Run."



Crew Number

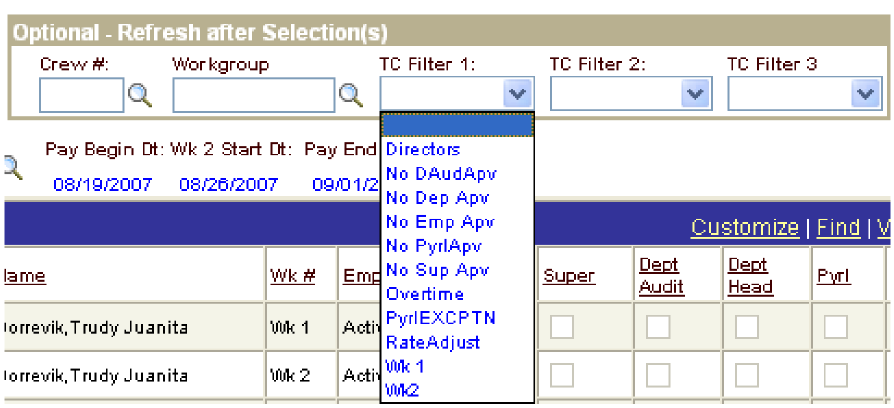
Press the prompt button to select the crew you wish to call up to approve. As a supervisor, you will only have access to your primary crew, or crews you have been selected as back-up for. This defaults to blank.



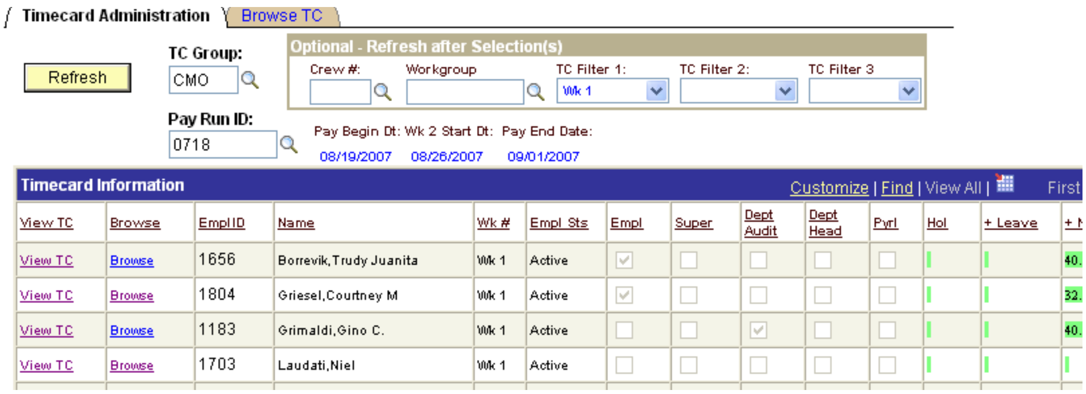
Crew Number	Description	Short Description
000752	Planning Manager	Mott
000761	Community Services Manager	Puent
000762	Code Enforcement Officer	Mott
000787	Development Services Director	Grile
001045	Department Assistant	Marx
001068	Planner 3	Donovan
001338	Planning Supervisor	Metzger
001375	Planning Supervisor	Summers

TC Filter

There is a drop down box that allows you to filter the timecards that are on your list. The one that is most used is filtering week 1 and week 2. If you filter by "Wk 1" it will only show you the timecards for that week. That way it is very easy to browse through those records to approve. You can do the same with "Wk2"



After you enter in Wk 1 into the TC Filter 1, you will need to click on the Refresh button to show just the week one records for your crew.



Timecard Administration | Browse TC

Refresh

TC Group: CMO

Pay Run ID: 0718

Optional - Refresh after Selection(s)

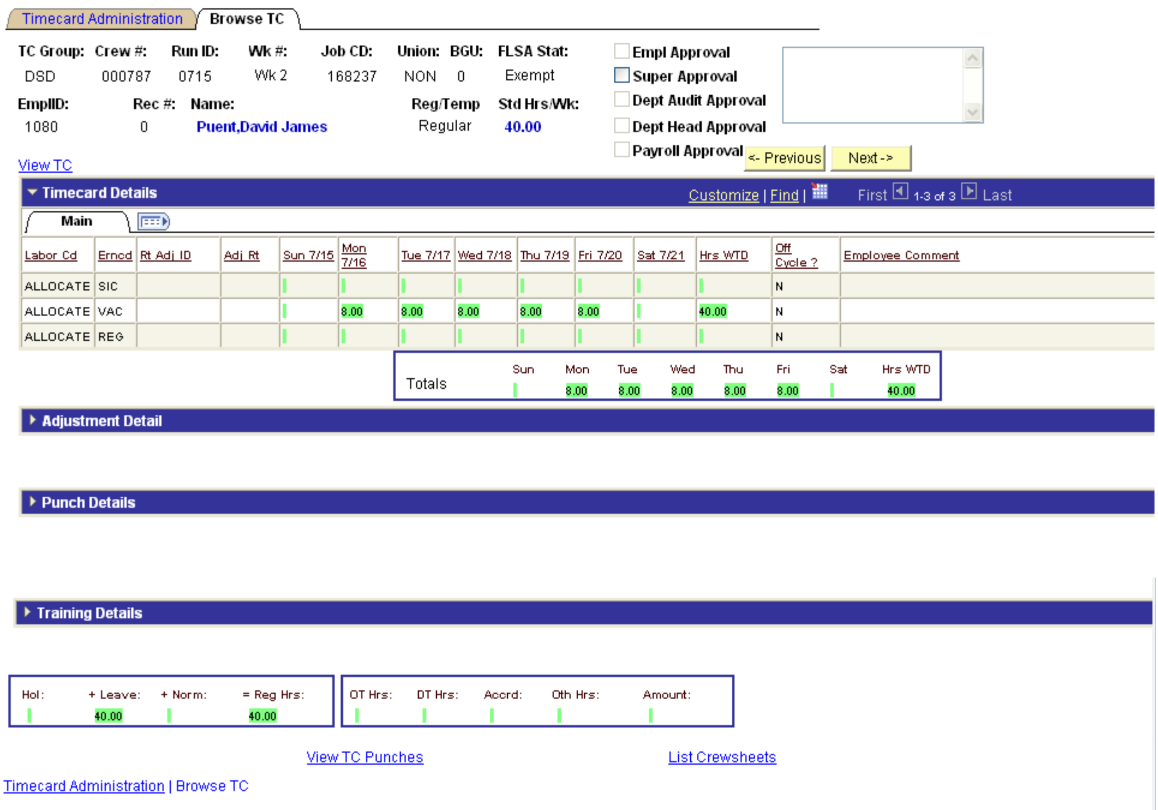
Crew #: | Workgroup | TC Filter 1: Wk 1 | TC Filter 2: | TC Filter 3

Pay Begin Dt: 08/19/2007 | Wk 2 Start Dt: 08/26/2007 | Pay End Date: 09/01/2007

Timecard Information — Customize | Find | View All | First

View TC	Browse	EmplID	Name	Wk #	Empl Sts	Empl	Super	Dept Audit	Dept Head	Pyrl	Hol	+ Leave	+ N
View TC	Browse	1656	Borrevik,Trudy Juanita	Wk 1	Active	☑	☐	☐	☐	☐			40.
View TC	Browse	1804	Griesel,Courtney M	Wk 1	Active	☑	☐	☐	☐	☐			32.
View TC	Browse	1183	Grimaldi,Gino C.	Wk 1	Active	☐	☐	☑	☐	☐			40.
View TC	Browse	1703	Laudati,Niel	Wk 1	Active	☐	☐	☐	☐	☐			

Browse TC



General Information

You can use the “Browse TC” page in the Timecard Administration area to review and approve your Employee’s time. This feature allows quick access to view the timecards, however you cannot modify any employee time here. If you need to perform an operation on an employee’s timecard other than approving it, you must use the “View TC” link to go to the employee’s timecard page for corrections. From there, you can make any changes that may be necessary before approving the employee’s time.

Approval Checkboxes

Check the [Super Approval] box for the employee timecard if you approve the time as entered. It will automatically save the approval check mark.

Navigation Buttons

Use the [Previous] and [Next] buttons to scroll through each timecards you have access to on the “Timecard Administration” page.

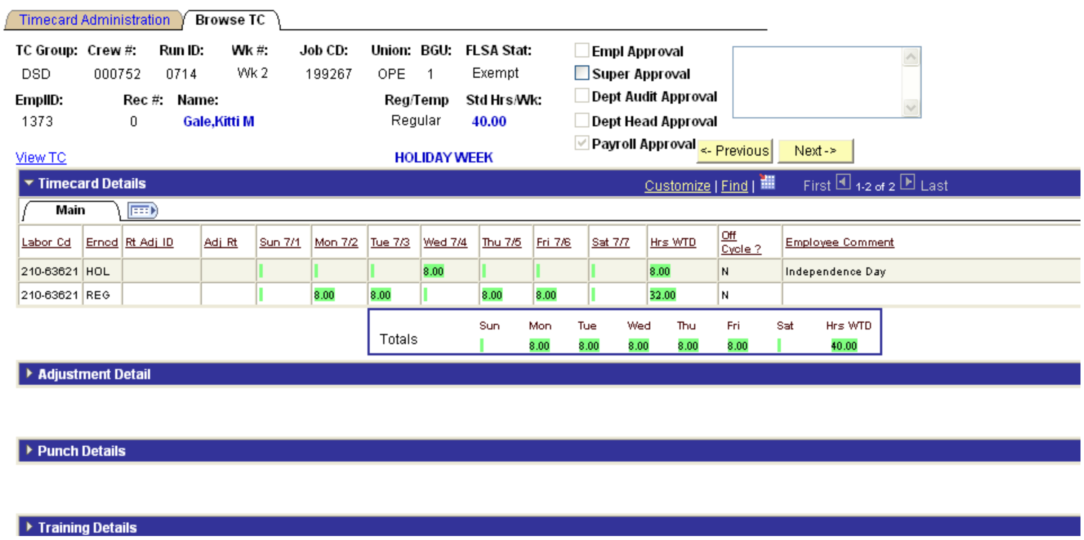
Timecard Information Columns

View TC

You can access any of crew's timecards by selecting the [View TC] link next to the person/week you wish to see. A new page will pop up with the employees Timecard. Follow the instructions for entering in an employee timecard if you need to make any changes.

Browse

This activates the "Browse TC" Tab and brings up the employee you select from the list. The "Browse TC" page is discussed later in this document.



Emplid and Name

This shows the Employee ID number and the Employee Name.

Wk

Timecards are completed on a weekly basis. Run-ID's are a 2-week period. Week # indicates which week (1 or 2) the given timecard is for in the given Run-ID.

Empl Sts

The Employee Status column displays the status the HR has entered for the employee. Typically, this should be "Active". However, if an employee is on leave, recently terminated or other, this status may reflect those situations.

Empl, Super, Dept Audit, Dept Head, and Pyrl Checkboxes

These checkboxes indicate who in the process has signed off on the timecards. If a box is checked, then that person has signed off and accepted the timecard as it was entered.

Hours Columns

The Timecard Home page will display hours in each of the categories seen. (Holiday, Leave, Norm (Regular), Overtime, Accumulated Hours (Acrd - Comp Time), Other Hours, and finally Adjustment amounts).

Adjustment Present

Adjustment Present is a check box that is used for Department Admin or Payroll for verifying an adjustment amount.

Crew

This field displays that crew that this employee is in. The crew is the group that one person supervises in a department or division.

TC Warn

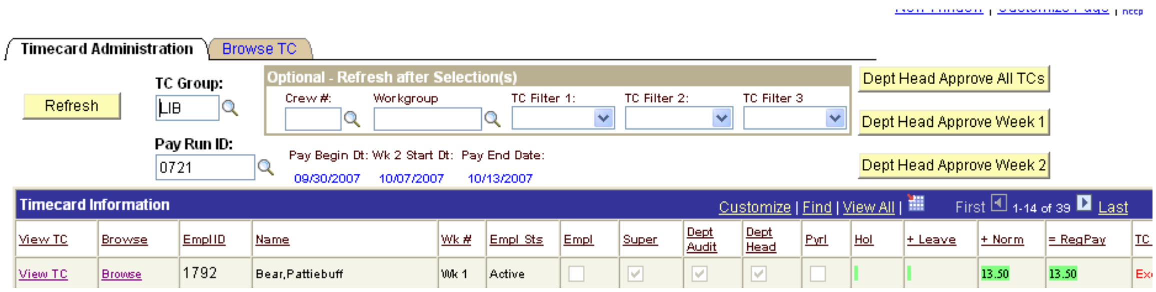
This red indicator will alert you if the employee is Missing a timecard, or has entered regular hours <> 40. The “Not 40” warning can be ignored if they do not typically work 40 hours, or if that week they truly had an exception.

Other Info

This column may have warnings if the employee’s current profile is out of synch with HR Data, or they are a contractor and not being paid through Payroll, or other important information about the employee.

Department Head Approval

Payroll will not lock down the timecards until all department heads have approved their department timecards.



The Department Head can either approve the timecards Week 1 then Week 2 or else they can approve all the timecards for the two weeks.

Dept Head Approve All TCs

The Dept Head Approve All TCs button allows the department head to click this one button to approve all of the timecards for the two week period for all employee timecards in the department. You can approve them this way or else go through the Browse TC to approve them one at a time

Dept Head Approve Week 1

The Dept Head Approve Week 1 button allows the department head to click this one button to approve all of the timecards for week 1 for all employee timecards in the department. You can approve them this way or else go through the Browse TC to approve them one at a time

Dept Head Approve Week 2

The Dept Head Approve Week 2 button allows the department head to click this one button to approve all of the timecards for week 2 for all employee timecards in the department. You can approve them this way or else go through the Browse TC to approve them one at a time

Correcting Timecards

If you find that there is information on a timecard that you are reviewing and approving that is incorrect, you may change the timecard and notify the employee that you have changed it.

The same instructions that are used for an employee entering in their timecard is the same documentation that you would use to correct a timecard. Please use the employee timecard entry documentation for entering in to an employee timecard.

Once you change the employee timecard and save it, the employee approval will become unchecked. It is one of the indications to the employee that their timecard has been changed. The employee will then have to go back in and reapprove their timecard.

NOTE: After you change an employees timecard, you will have to click the RED X at the top right of the page to exit out of the timecard and go back to the main Administer Timecard page. You do not use the RED X to exit out of PeopleSoft only out of an employee timecard if you are in administer timecard.

Notifying the Employee

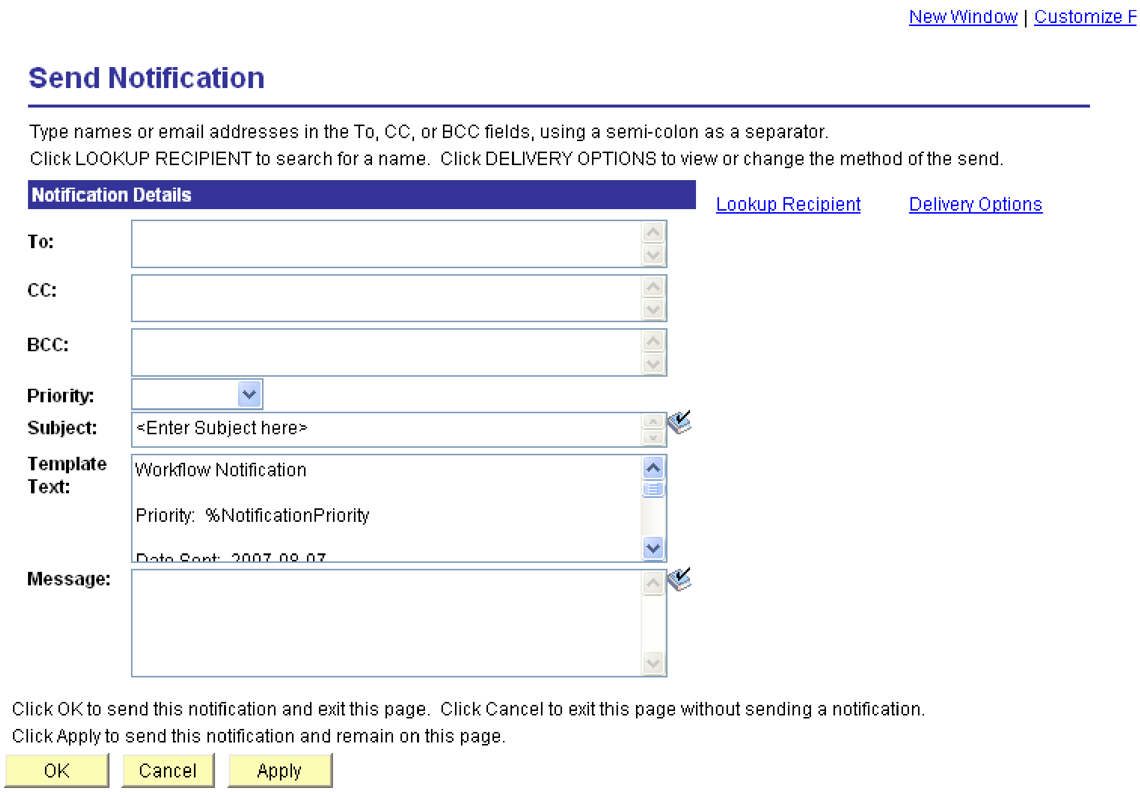
Once you change the employee's timecard, an email will automatically be sent to notify the employee that they need to reapprove their timecard.

If you would like to add more comments you can also send the employee an additional email.

To notify the employee, click on the Notify button at the bottom of the page.

Send Notification Page

A new page will open that will have the standard format for an email. You can enter their email address into the To: field or else you can click on the Lookup Recipient link.



Lookup Recipient Address Link

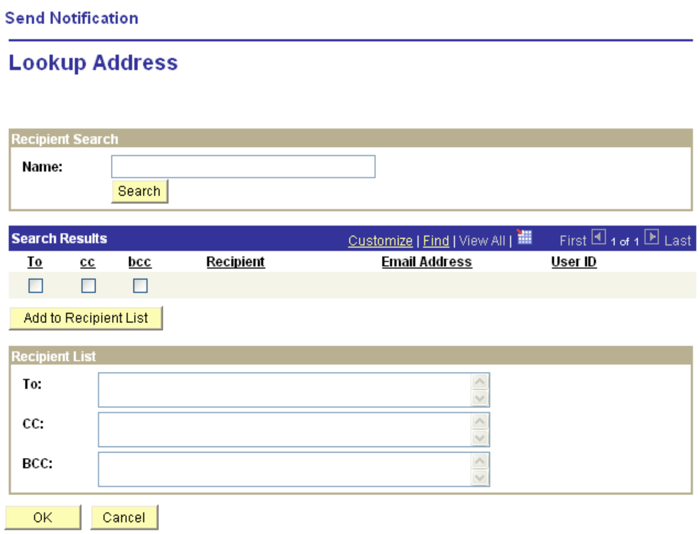
When you open up the recipient link, it will give you a page that had the Recipient Search at the top.

Enter in the first characters of the person's last name.

Click the Search button. It will give you a list of employees that start with those characters.

Click on the To: check box besides the employee you are sending the notify to. Click on the Add to Recipient List button.

Click on the OK button.



Send Notification

Lookup Address

Recipient Search

Name:

Search

Search Results — Customize | Find | View All | First 1 of 1 Last

To	cc	bcc	Recipient	Email Address	User ID
☐	☐	☐			

Add to Recipient List

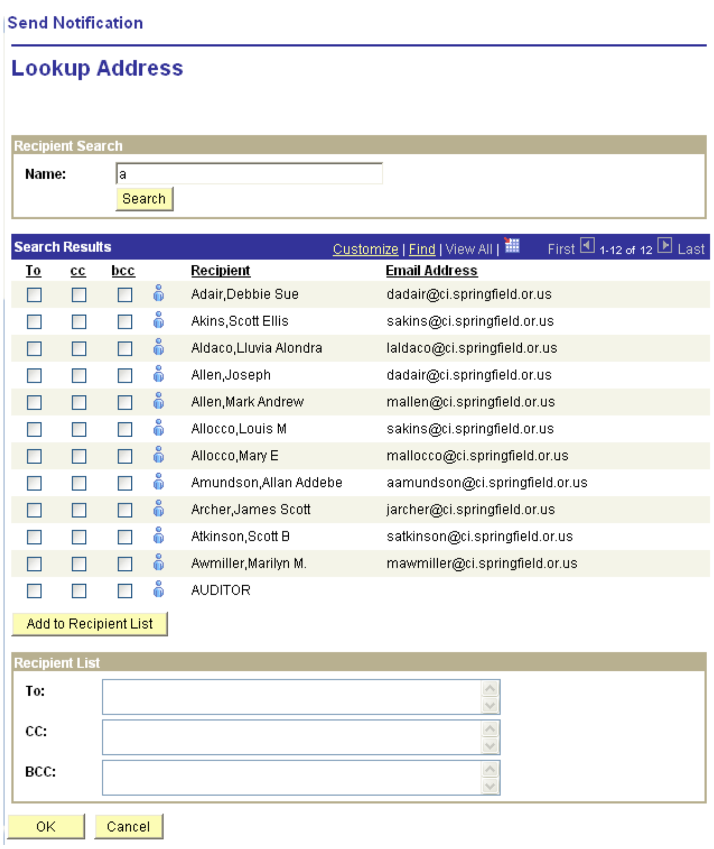
Recipient List

To:

CC:

BCC:

OK Cancel



Send Notification

Lookup Address

Recipient Search

Name: a

Search

Search Results — Customize | Find | View All | First 1-12 of 12 Last

To	cc	bcc		Recipient	Email Address
☐	☐	☐		Adair,Debbie Sue	dadair@ci.springfield.or.us
☐	☐	☐		Akins,Scott Ellis	sakins@ci.springfield.or.us
☐	☐	☐		Aldaco,Lluvia Alondra	laldaco@ci.springfield.or.us
☐	☐	☐		Allen,Joseph	dadair@ci.springfield.or.us
☐	☐	☐		Allen,Mark Andrew	mallen@ci.springfield.or.us
☐	☐	☐		Allocco,Louis M	sakins@ci.springfield.or.us
☐	☐	☐		Allocco,Mary E	mallocco@ci.springfield.or.us
☐	☐	☐		Amundson,Allan Addebe	aamundson@ci.springfield.or.us
☐	☐	☐		Archer,James Scott	jarcher@ci.springfield.or.us
☐	☐	☐		Atkinson,Scott B	satkinson@ci.springfield.or.us
☐	☐	☐		Awmiller,Marilyn M.	mawmiller@ci.springfield.or.us
☐	☐	☐		AUDITOR	

Add to Recipient List

Recipient List

To:

CC:

BCC:

OK Cancel

Enter Subject

Enter in the Subject for this notification. It should say something to the effect of “Change in your timecard.”

Message

Do not change anything that is in the Template Text: box.   Enter in the message of the change that you made to the timecard. For example: “You put down 4 hours of overtime and I have that you worked 5 hours so I changed your timecard to reflect that. Please go back to your timecard and reapprove it.”

This is what the message will look like to the employee that they receive in their Outlook email account.

From: gmott@ci.springfield.or.us   Sent: Tue 8/7/2007 4:10 PM
To: GUTHRIE Paula
Cc:
Subject: Change in your timecard

```
Workflow Notification

Priority:

Date Sent:  2007-08-07

Sent To:  Guthrie,Paula Jane/GUTH7035

cc:

Please click on the link below to access this transaction:
http://sp8htest2.springfield1.net/psp/HR8TC2_1/EMPLOYEE/PSFT_HR/c/SPR_TIMECARD.LCTC_MY_TIMECARD.USA?
Page=LCTC_MY_TIMECARD&LC_TMCD_GROUP=DSD&LC_TMCD_USERID=T00193&LC_TMCD_USER_RCD=0&LC_WEEKNO=2&PAY_END_DT=2007-08-18&RUN_ID=
0717&WEEK_BEGIN_DT=2007-08-12&Action=U


Message Text:

You put down 4 hours of overtime and I have that you worked 5 hours so I changed your timecard to reflect that.  Pleas go
back and reapprove your timecard.
Thanks
Your supervisor
```

DEPARTMENT ADMININSTRATOR

Time Entry - Training Guide

Created September 2007

Logging into the Network

9. The IT department assigns you a network login when you start at the City. If you have not logged into the network, you can request your login and password from the IT Help Desk at x1234.
10. Turn on the computer.
11. It will then give you a screen to log into Windows by pressing the CTRL key and the ALT key and the DEL key at the same time
12. If this is your desk computer, it will already enter in the username. If the username is not yours then you need to enter in your username
13. Enter in your first initial followed by your last name and then the"@" symbol then springfield1.net.

Example: hsimpson@springfield1.net

14. Enter in your password
15. Click on the OK button
16. You will then be logged into the City of Springfield network.

Reaching and Logging on to PeopleSoft HRMS

3. Launch the browser (Internet Explorer) 

and navigate to Springboard. http://springboard

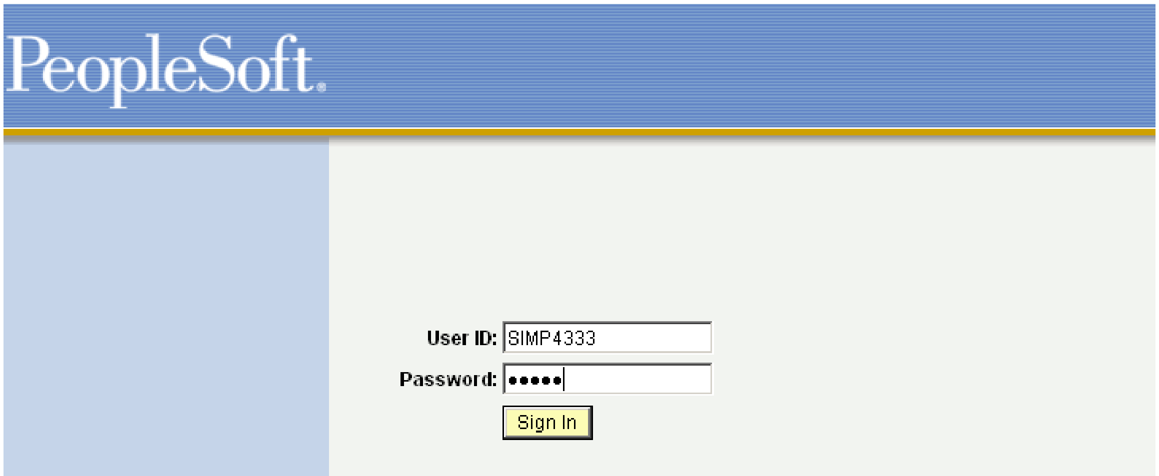
2. From Springboard, you will Select Employee Self Service by clicking on the picture or the "Employee Self Service" text.

The PeopleSoft sign on page should then display and you can sign-on to the PeopleSoft system. Your ID and PASSWORD must be entered in UPPERCASE.

Your ID is the first four characters of your last name, followed by the last 4 digits of your social security number.

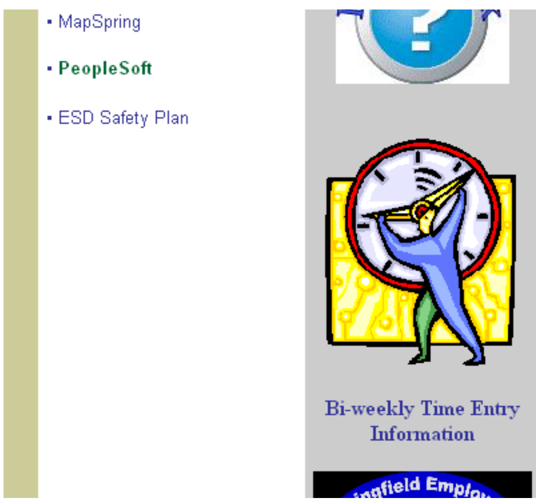
Your password is assigned to you and you should change it every so often. It is important that your login stays secure because there is lots of sensitive information. You can follow the instructions under ePay on how to change your password.

If you attempt to login to the system 3 times incorrectly, you will be locked out of the system. If this happens, or you have forgotten your password, you will need to contact the IT Help Desk at X1234 to have them unlock or reset your password.



Training Database

For training, we are using a copy of the production database. You can reach it by going to Springboard. From the main page, click on the Time Entry link. At the top of the page, is the link to training database.



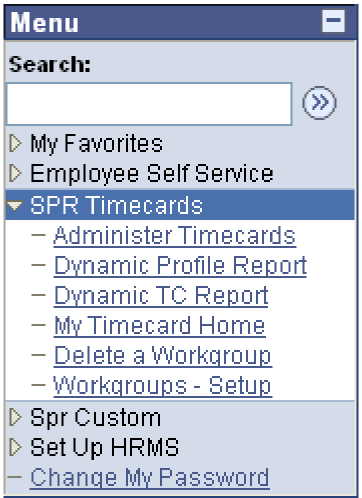
Overview

Department Administration employees for time entry have the responsibility of:

1. Making sure that the information is correct for the employee to enter in their timecard (profiles) and updating information as needed

2. Reviewing and approving timecards before supervisor or department heads have approved them to make sure entries look correct
3. Answering questions that employees may be having regarding entering in their time

SPR Timecards

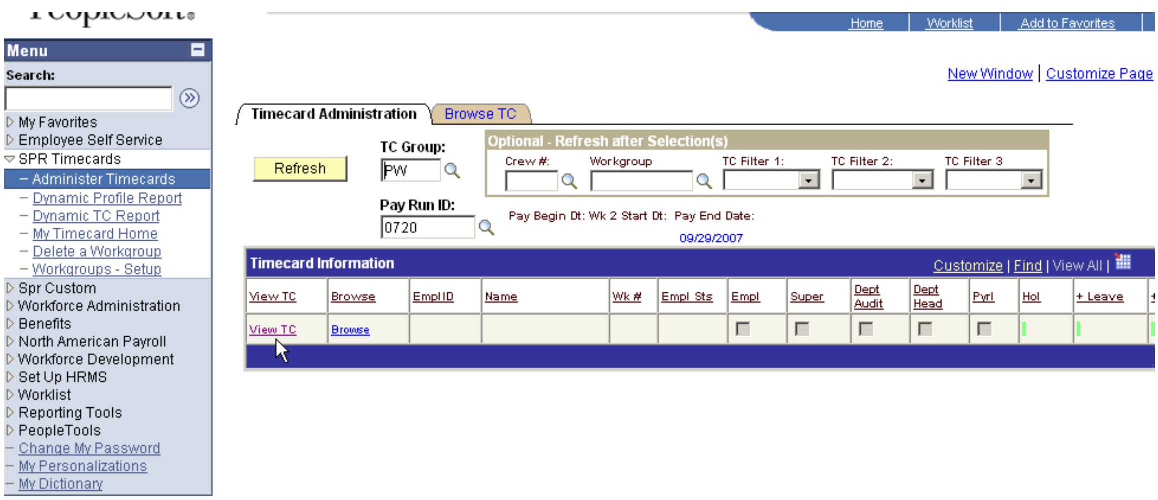


Administer Timecard

Administer timecards are two pages that you can navigate through several employee timecards and see what has been entered. This allows you to also check of the Dept Admin Approval if the timecard is correct.

Navigate to SPR Timecards > Administer Timecards

Use the "Timecard Administration Link" to bring up the Administer Timecards page in a separate window. This will allow Payroll the ability to reach individual timecards in an orderly fashion.



Dynamic Profile Report

See other documentation regarding how to work with the Dynamic Profile Report

Dynamic TC Report

See other documentation regarding how to work with Dynamic TC Report

Workgroups - Setup

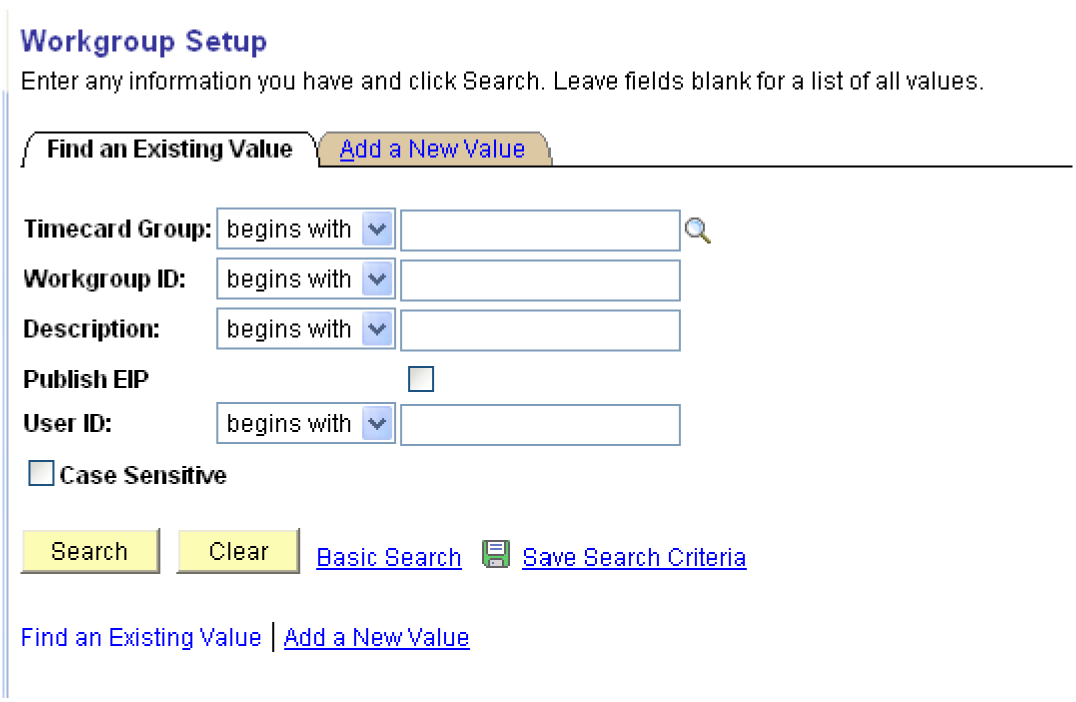
What is a workgroup?

A workgroup is a list of employees that supervisors or administrators can create and use to make their jobs easier. For example, if a supervisor in the Police Department has a crew that includes people on multiple shifts, and it would be easier for them to process these employees by shift, then they can create workgroups that allow the supervisor to split the employees out. They could also be used to track employees by the type of work they may be doing, such as road crew vs tree crew. Workgroups are a convenience tool and it is up to the workgroup creator to maintain their lists.

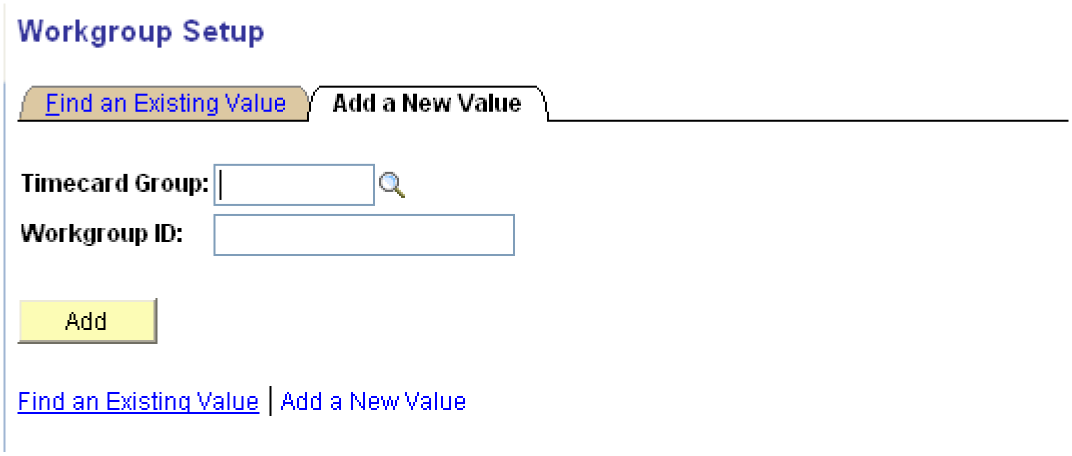
** NOTE – Workgroups can be used in any fashion you wish, but they do not grant or rescind security access to an employee by a supervisor or administrator in any way, even if you share the list with another supervisor that may only have access to some of the employees on it. If that supervisor uses the list, then they will only see employees they have access to appear. Employees can be placed in multiple workgroups.

Setting up a New Workgroup

Navigate to SPR Timecards > Workgroups - Setup



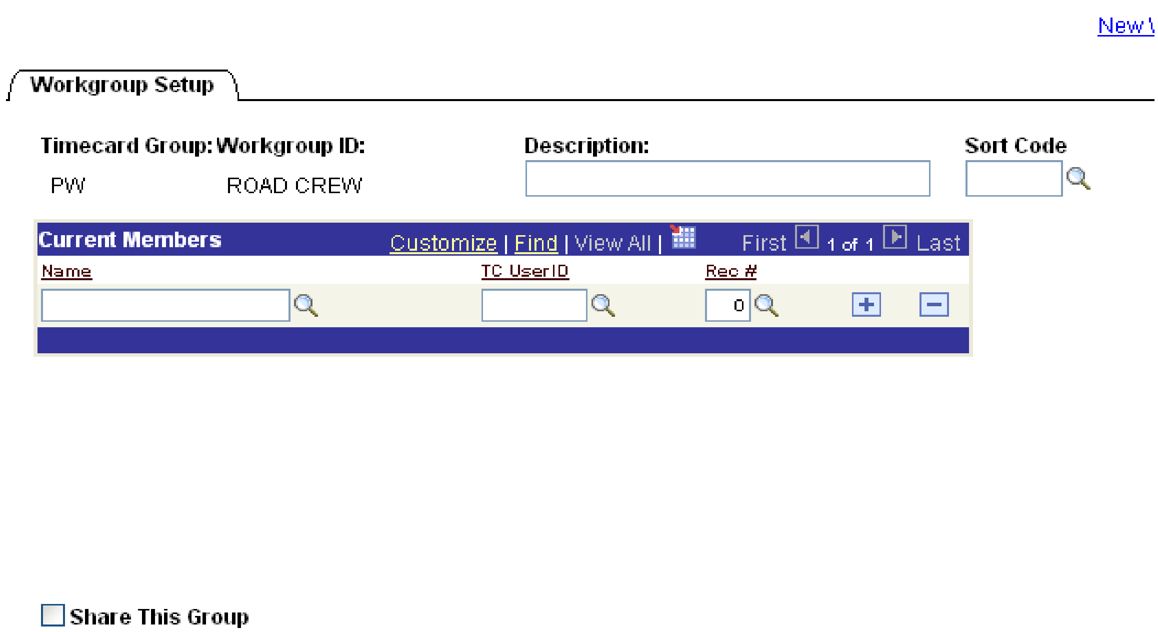
Click on the Add a New Value Tab



Enter in your Timecard Group or select it from the magnifying glass dropdown list.

Enter in a Workgroup ID. This ID can be anything that helps you identify the group easily.

Click on the Add Button



On the workgroup setup page, enter in a description and add employees.

The easiest way to add members is to type in their last name and hit tab. If you enter enough of their name, then it will automatically find the employee and add them.

If you are unsure of the name or several people share a similar last name, then you can use the lookup prompts on either the name or TC UserID fields to find them.

To share this group with others besides yourself, check the “Share This Group” check box. Enter in names of supervisors, managers, and dept admin with whom you would like to share this group.

Sharing a group will allow the individual to both use the group in the administer timecards page AND to update it. If you want to be the only person who can modify the workgroup definition, check the “Only allow me to Update Workgroup Setup” checkbox.

Using the Workgroup in Administer Timecards

Enter the Administer Timecards page.

Either type in your workgroup name, or use the prompt to look it up.

Press the “Refresh” button.

You can use workgroup in combination with any other filter as well.

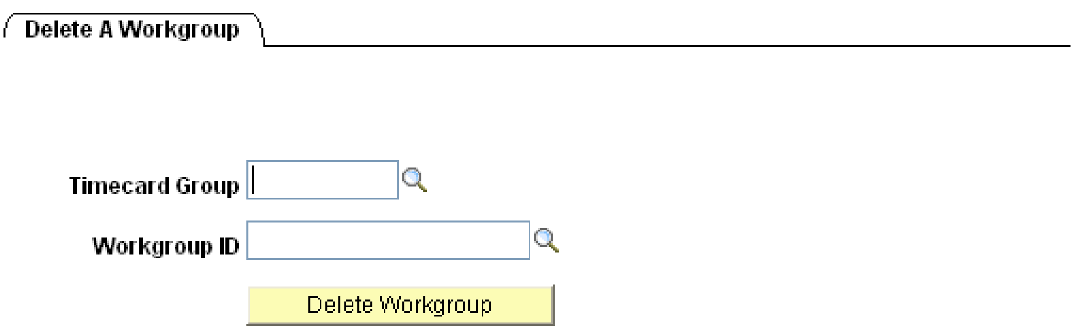
Delete a Workgroup

If there is a workgroup that you are no longer using, you can delete that group.

Navigate to SPR Timecards > Delete a Workgroup

Enter in the Timecard Group and the Workgroup ID number.

Click on the Delete Workgroup Button.



Spr Custom Menu

The SPR Custom menu has menu items that you can use.

- Spr Custom
  - Employee Evaluation Report (C)
  - Paysheet Edit (S)
  - Timecard Crew Report
  - Leave Benefit Request

Timecard Crew Report

This report will give you a list of Supervisors and who is in their crew.

Timecard Crew

Page No. 1
Run Date 8/16/2007
Run Time 1:30:20 PM

Report ID: TC_CREW

Group	TC User ID	Eff Date	Emplid	Name	Position Nbr	Jobcode
CMO						
000001	City Manager			Grimaldi		
	T00061	7/1/2006	1108	Wilson,Julie Martinez	00001041	169120
	T00110	5/1/2006	1183	Grimaldi,Gino C.	00000001	188007
	T00305	7/1/2006	1578	Sowa,Amy L.	00001042	243342
	T00372	5/1/2007	1703	Laudati,Niel	00001351	161060
	T00507	4/30/2007	1821	Towery,Jeffrey Raymond	00000002	188107
000002	Assistant City Manager			Towery		
	T00075	7/1/2007	1131	Tamulonis,John B.	00000887	188237
000887	Community Development Mgr			Tamulonis		
	T00452	12/4/2006	1804	Griesel,Courtney M	00001388	199367
001041	Administrative Coordinator			Wilson		
	T00342	10/8/2006	1656	Borrevik,Trudy Juanita	00001180	21936N
COURT						
000153	Court Supervisor			Cunningham		

Leave Benefit Request

See other documentation regarding how to use Leave Benefit Request.

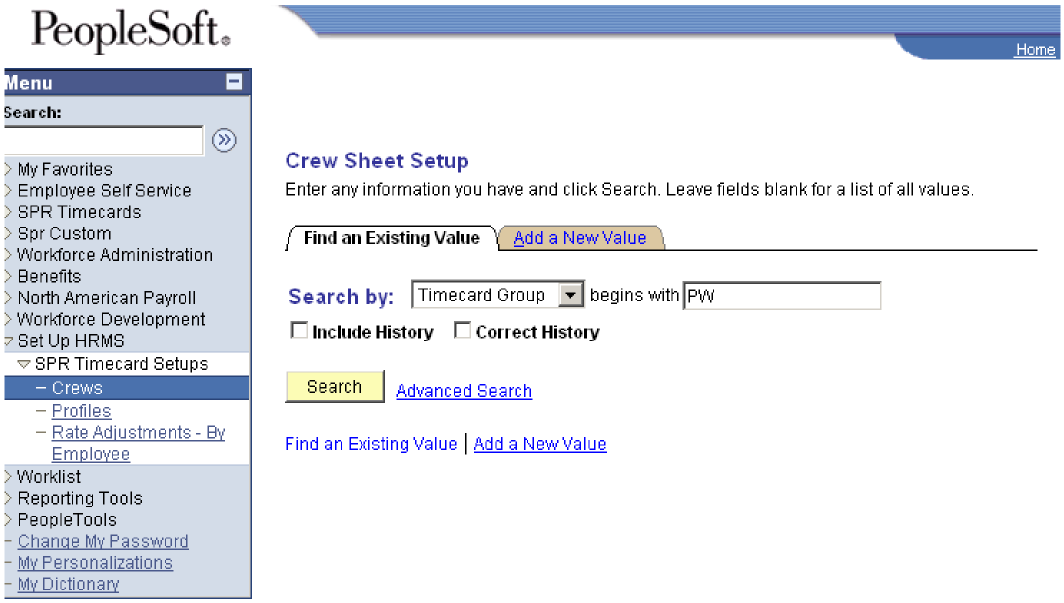
Setup HRMS – SPR Timecard Setups

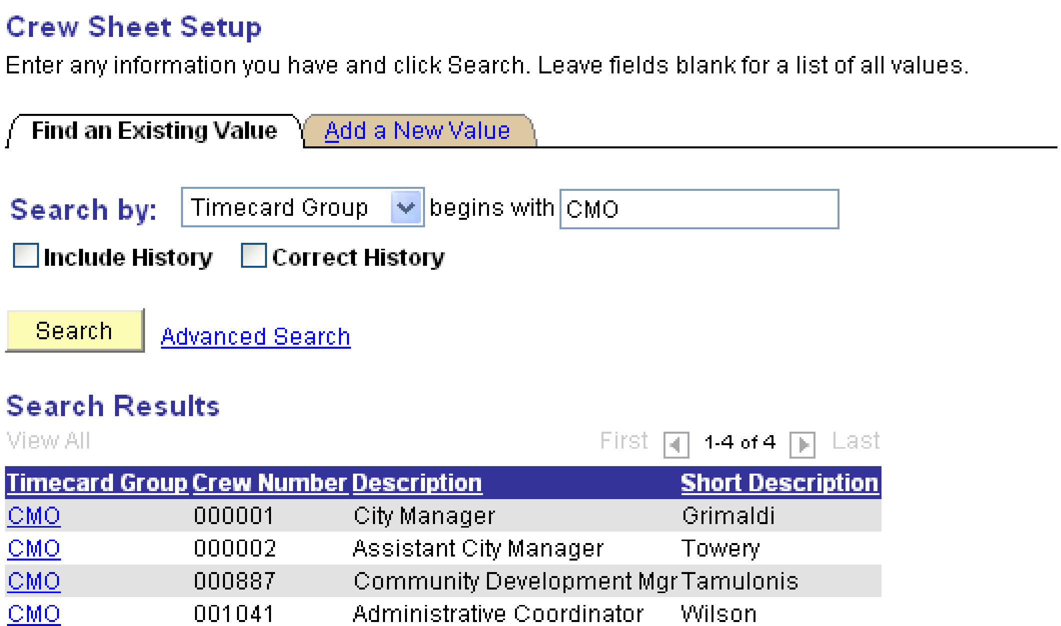
Crews

Crews are groups of employees that are supervised. Most of the time a crew is only supervised by one person but there could be alternate supervisors that could be in charge of the group from a timecard status when the primary supervisor is gone.

Navigate to Set Up HRMS > SPR Timecard Setups > Crews

The timecard group will only allow you to look at your own department. When you click on the timecard group search for your department it will list the crews that are setup.




Crew Sheet Setup

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

Find an Existing Value | Add a New Value

Search by: Timecard Group begins with CMO

Include History   Correct History

Search   Advanced Search

Search Results

View All   First 1-4 of 4 Last

Timecard Group	Crew Number	Description	Short Description
CMO	000001	City Manager	Grimaldi
CMO	000002	Assistant City Manager	Towery
CMO	000887	Community Development Mgr	Tamulonis
CMO	001041	Administrative Coordinator	Wilson

To Add A New Crew Leader

Before you add a new crew, you will need to know the supervisor’s position number. That is the key to how the crews are setup.

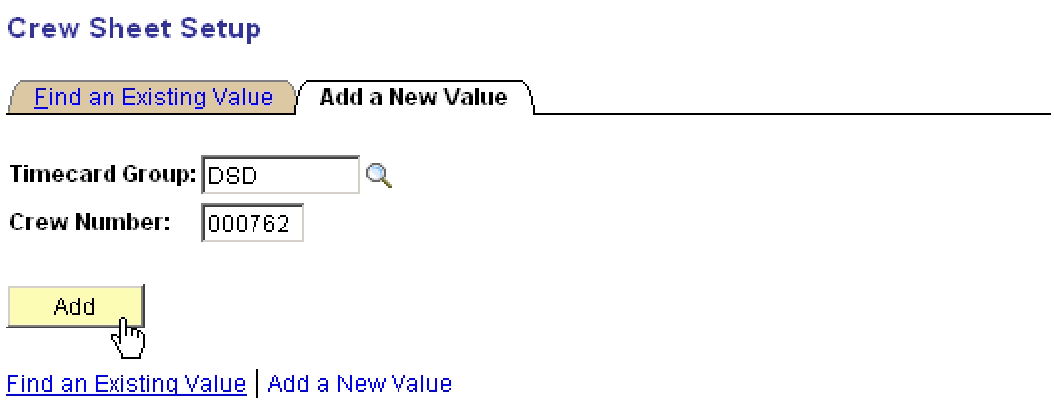
Click on the Add a New Value tab to add a new crew group.

The timecard group should be the department you are in.

You can click on the magnifying glass to see the groups that are available for you.

Crew Number is equal to the supervisor's ***position*** number. You will need to add the appropriate number of zero's to fill the cell.

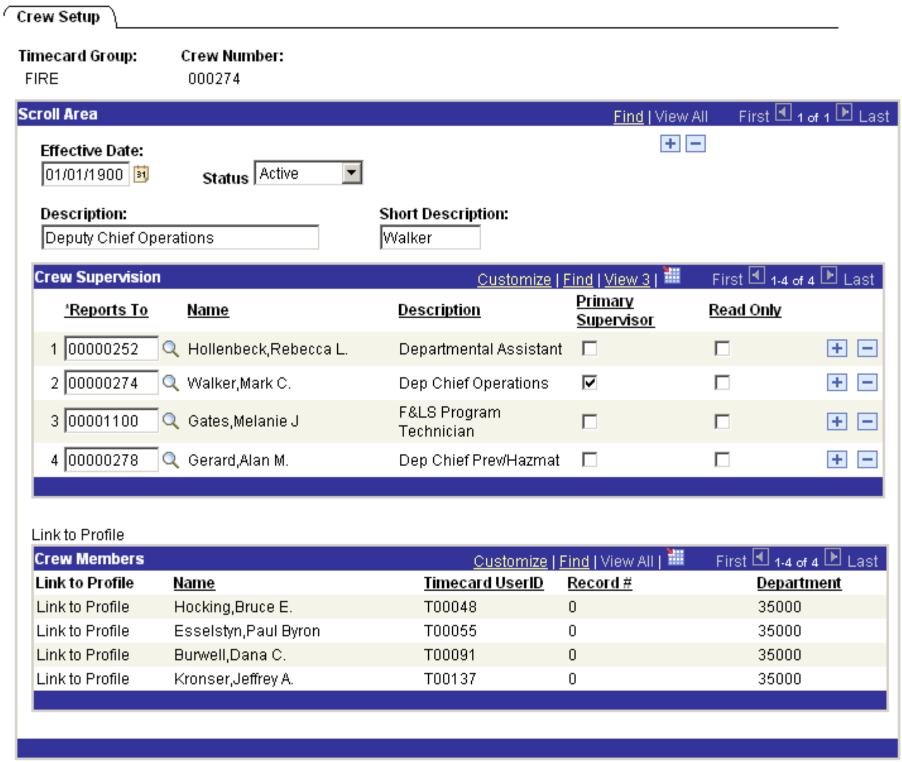
Click on the Add button



It will take you to the Crew Setup page.

The Scroll Area shows:

- Effective date of when the crew was setup
- Is this an active or inactive Crew?
- Enter in the classification description of the supervisor
- Enter in the Last Name of the supervisor for this crew



Crew Setup

Timecard Group: FIRE

Crew Number: 000274

Scroll Area — Find | View All — First 1 of 1 Last

Effective Date: 01/01/1900 Status Active

Description: Deputy Chief Operations

Short Description: Walker

Crew Supervision — Customize | Find | View 3 | First 1-4 of 4 Last

	*Reports To	Name	Description	Primary Supervisor	Read Only
1	00000252	Hollenbeck,Rebecca L.	Departmental Assistant	☐	☐
2	00000274	Walker,Mark C.	Dep Chief Operations	☑	☐
3	00001100	Gates,Melanie J	F&LS Program Technician	☐	☐
4	00000278	Gerard,Alan M.	Dep Chief Prev/Hazmat	☐	☐

Link to Profile

Crew Members — Customize | Find | View All | First 1-4 of 4 Last

Link to Profile	Name	Timecard UserID	Record #	Department
Link to Profile	Hocking,Bruce E.	T00048	0	35000
Link to Profile	Esselstyn,Paul Byron	T00055	0	35000
Link to Profile	Burwell,Dana C.	T00091	0	35000
Link to Profile	Kronser,Jeffrey A.	T00137	0	35000

Crew Supervision

- Enter in the Position Number or select it from the magnifying glass on the primary supervisor.
- To add another person, click on the plus symbol on the right hand side of the crew supervision line.
- Make sure that Primary Supervisor box is checked for the primary supervisor. If there is another supervisor and you want them to see the employees in this group, you can check them as a primary supervisor too.
- Add the supervisor position number for any supervisor that will back up the primary
- Add the Department Admin employees for this crew
- If there is a person that you want to be able to view only this crew, you can add them and check the read only box. They can view but not change any records.
- Click on the Save button at the bottom of the page.

Crew Members

- Reporting to a Supervisor is set up in Profile and appears as a “view only” section in crew set up. This shows the list of employees for this crew.

Profiles

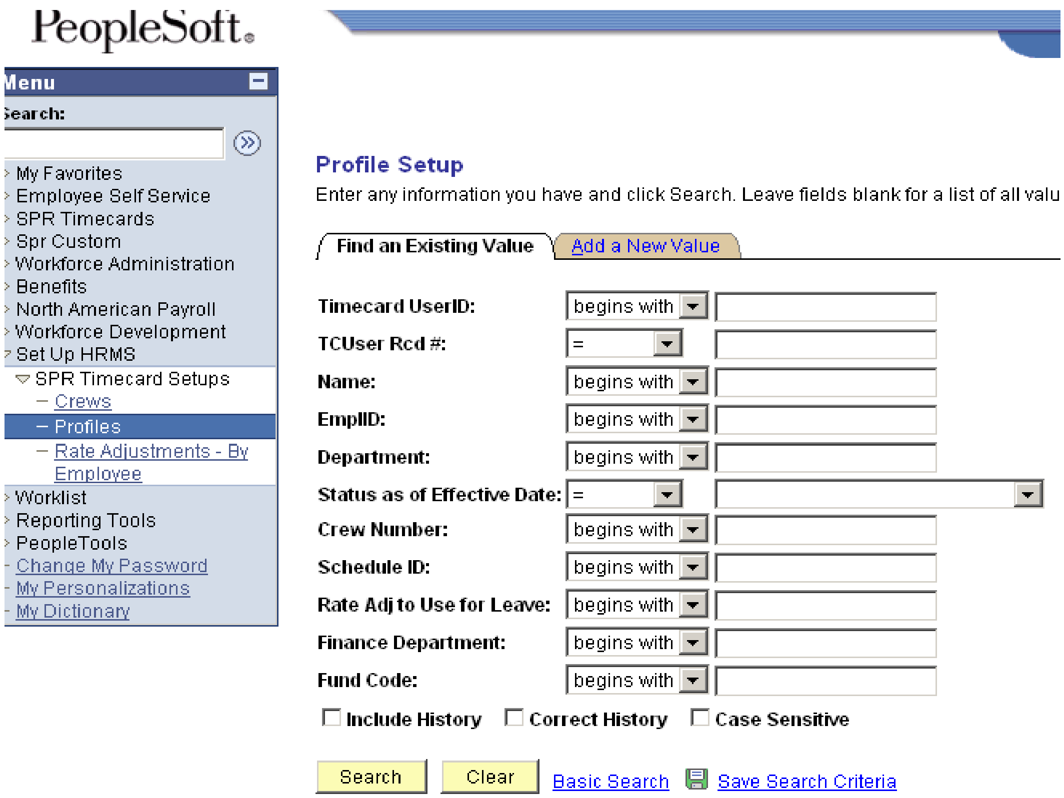
Profiles are records for each employee that is setup with additional information just for time entry. Every employee paid through the People Soft system will have an individual Time Card and Profile. Profile is where you will set up the parameters for an employee's timecard.

Most information will come over from PS job data in a nightly refresh process, but you can update this page or create a new hire if needed on rare occasions. Most of the time you should wait until the new employee record is added through the employee hire and then created in profile. The effective date is very sensitive for employees! If an employee is transferred to another department, or is taking another job, the date will affect their timecard. Always add a row to update information, this builds a history file.

Navigate to Set Up HRMS > SPR Timecard Setups > Profiles

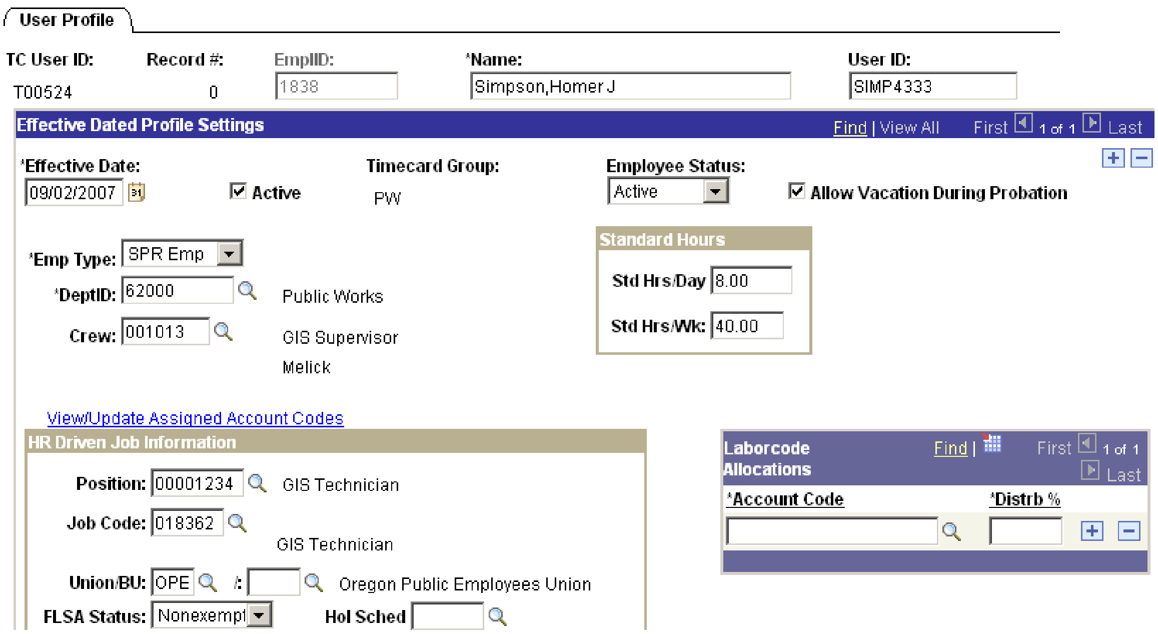
Enter the employee's ID number or name in the "Find an Existing Value" tab.

The employee should show up. If record does not exist, contact Payroll for more information.



There are only three things that you will add for a new employee.

- Crew that this employee belongs to
- Account Codes
- Allow Vacation during probation check box

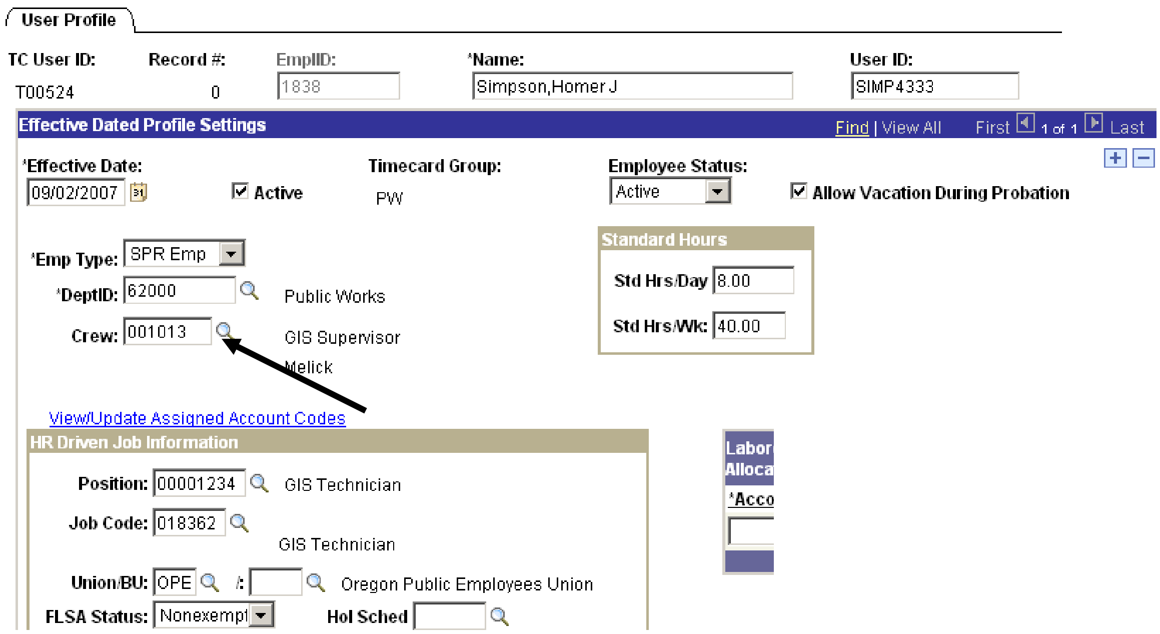


Enter Crew Information

This is where you will put each employee into a Supervisor's Crew. An employee not assigned to a **Crew** yet, will say "NEW" If am employee is inactive or a department head, they will have a crew of "NEW". If they are not either one of these, then they need to have a crew number entered.

Click on the magnifying glass and all Crews available to your department will come up for selection. Click the supervisor that will be reviewing this employee's timecard and SAVE.

If you update information in the crew field, it will automatically send an email to HR to allow them to update the information in the Job Record.

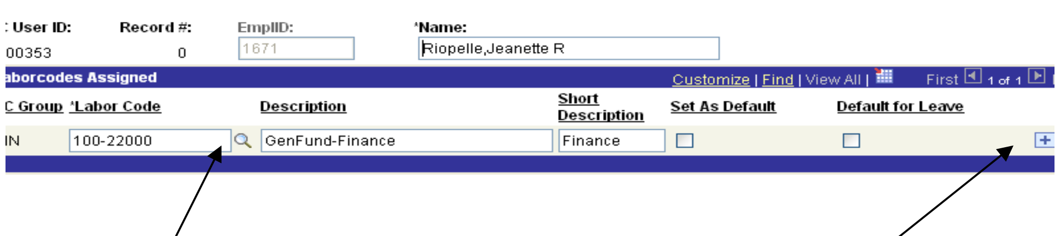


View/Update Assigned Account Codes

After setting up an employee in a specific crew, the next step is to assign Account Codes to the employee. The purpose of assigned account codes, is to minimize the options a person has to choose from in order to fill out their timesheet, creating a more simplified and efficient system. There are over 300,000 account codes in the PS system, and we want to reduce the confusion and possibility of errors.

Click on the following link displayed in the center of the Profile Page:

View/Update Assigned Laborcodes



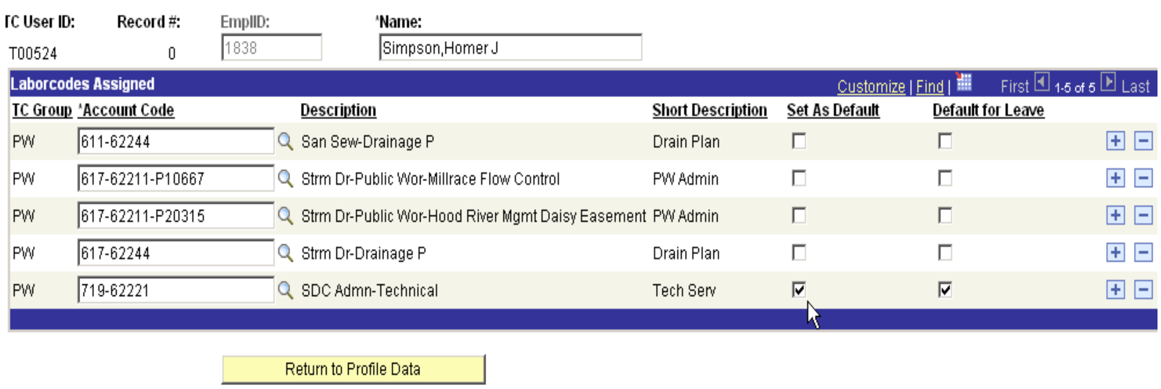
Add a row for each account code the employee needs to have shown on their timecard.

Use the magnifying glass lookup for account code.

The Set As Default check box is for the account code that you want as a default when a timecard is open that does not have a template setup. Every employee needs to have one account that is set as a default.

The Default for Leave check box is the account code that you want as a default for leaves. For example, when a holiday is automatically loaded, it needs to have the default for the leave account that it should use. Every employee needs to have one account that is set as a default for leave.

Each employee should have a set as default and default for leave account code checked.



TC User ID: T00524 Record #: 0 EmplID: 1838 *Name: Simpson,Homer J

Laborcodes Assigned Customize | Find | First 1-5 of 5 Last

TC Group	*Account Code	Description	Short Description	Set As Default	Default for Leave
PW	611-62244	San Sew-Drainage P	Drain Plan	☐	☐
PW	617-62211-P10667	Strm Dr-Public Wor-Millrace Flow Control	PW Admin	☐	☐
PW	617-62211-P20315	Strm Dr-Public Wor-Hood River Mgmt Daisy Easement	PW Admin	☐	☐
PW	617-62244	Strm Dr-Drainage P	Drain Plan	☐	☐
PW	719-62221	SDC Admn-Technical	Tech Serv	☑	☑

Return to Profile Data

Click on the Return to Profile Data button.

Click on the SAVE button.

Allow Vacation During Probation

If a new employee is hired with a bonus of front loaded vacation hours, then you need to check this box. It allows the employee to use their front loaded vacation hours before they have been here for 6 months. Do not check this unless you know that the new employee has been given the vacation when they were hired.

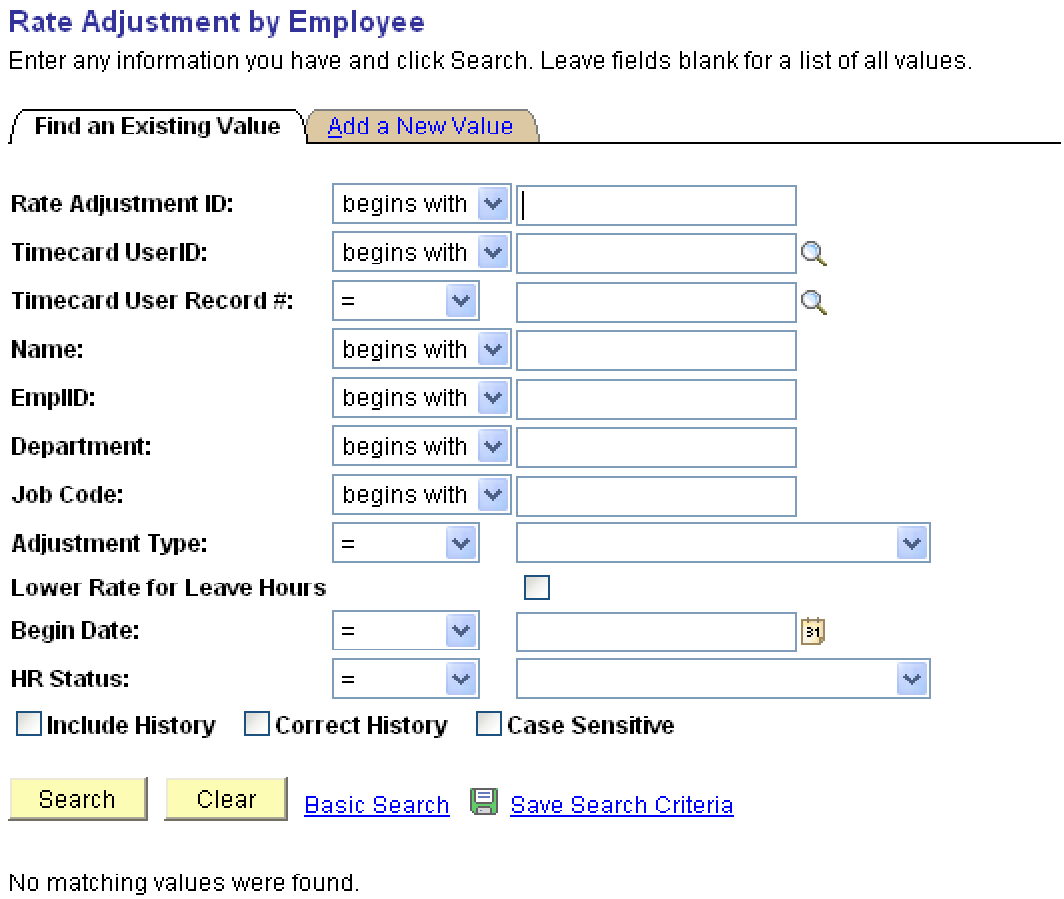
Rate Adjustments - By Employee (AIC)

AIC pay can now be processed through the time-card system. When an employee will be serving as Acting-In-Capacity for a supervisor, rather than filling out a PAF and having payroll calculate the AIC pay; a designated person in each department can go into the system and set up the parameters for the employee to enter hours into their timecard. Right now the duties are given to the Department Admin person for the department.

Navigate to Set Up HRMS > SPR Timecard Setups > Rate Adjustments – By Employee

The two most common AIC scenarios are an employee receiving a % increase or a different grade/step adjustment. Both can be handled in this screen.

When you go into the page of Find an Existing Value, click on the Search button to see if there are any rate adjustments records for your department. If there is an AIC record for this employee, use that record and just add a new row. If there is not a record for this employee, then you need to Add a New Value.



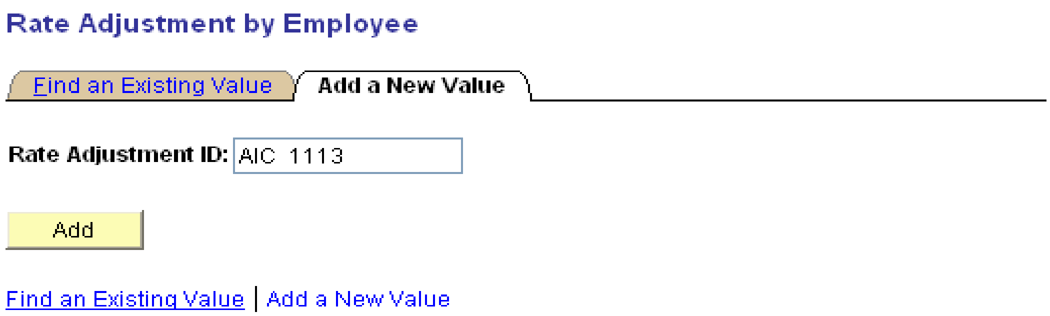
Add a New Value

Click on the Add a New Value tab

Enter in the new Rate Adjustment ID.

This will be “AIC” followed by 4 spaces and the employee id number.

Click on the Add button



Add a Row

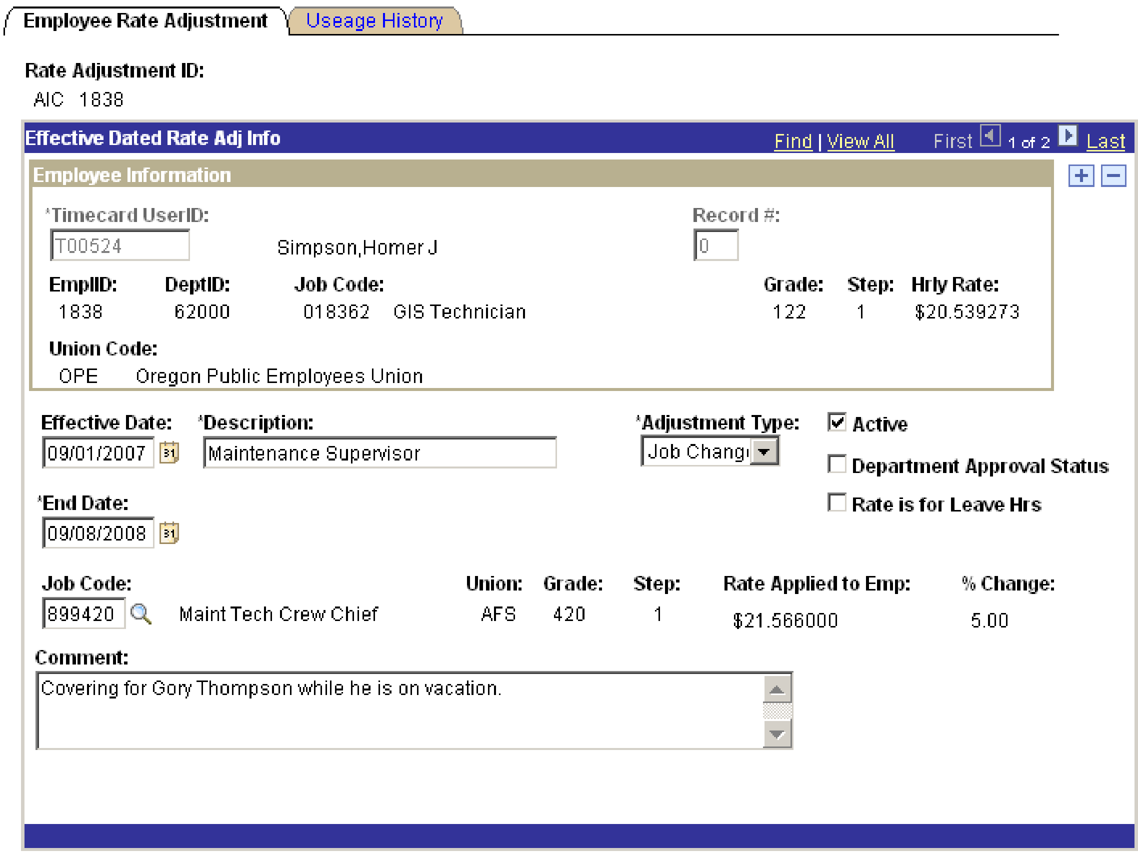
If from doing a search of your department, you see an employee has an AIC record, you can select that record and add a new row instead of adding a new record.

Call up the record

Click on the plus button to add a new row

Change the information that is needed for this new AIC request

Job Change



Begin and End dates will control when the employee can add hours to the rate adjustment box on their timesheet.

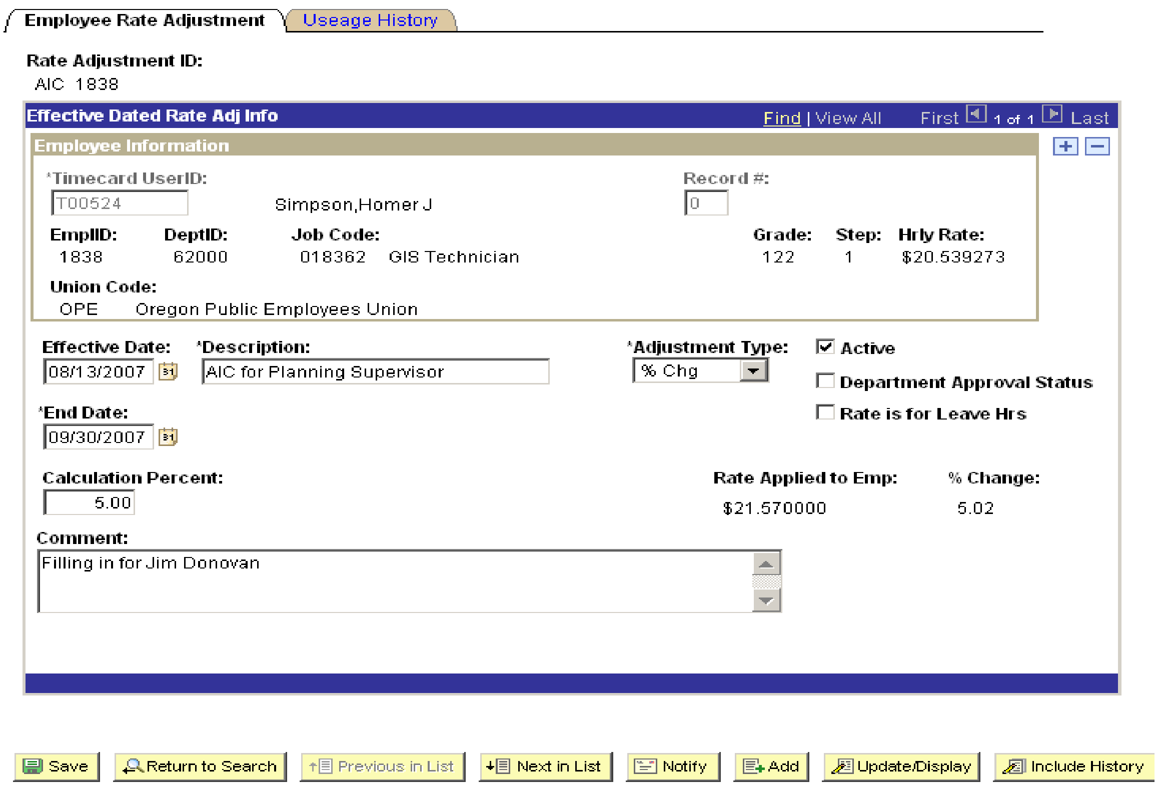
Adjustment Type will be “Job Change”

Use the look up button to find the job code of the AIC position.

Double check that the Grade/Step/ Rate are correct.

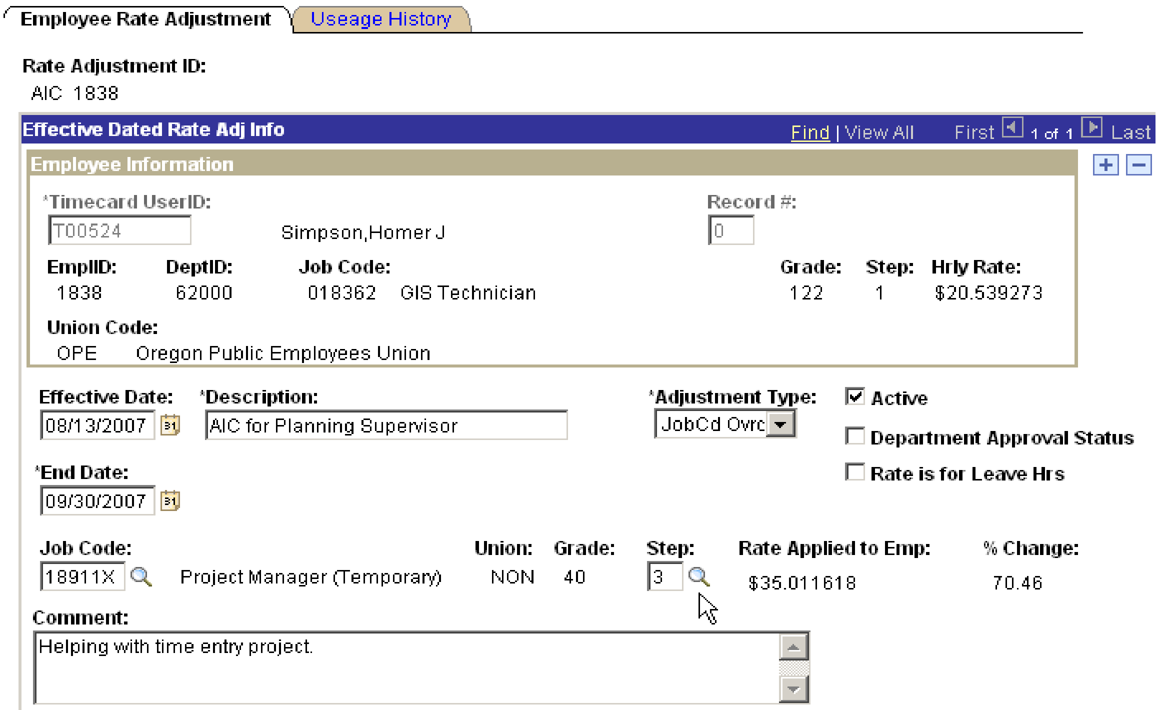
Add a row every time a new AIC situation arises. This will keep a historical account of Rate Adjustments.

Percentage Change:



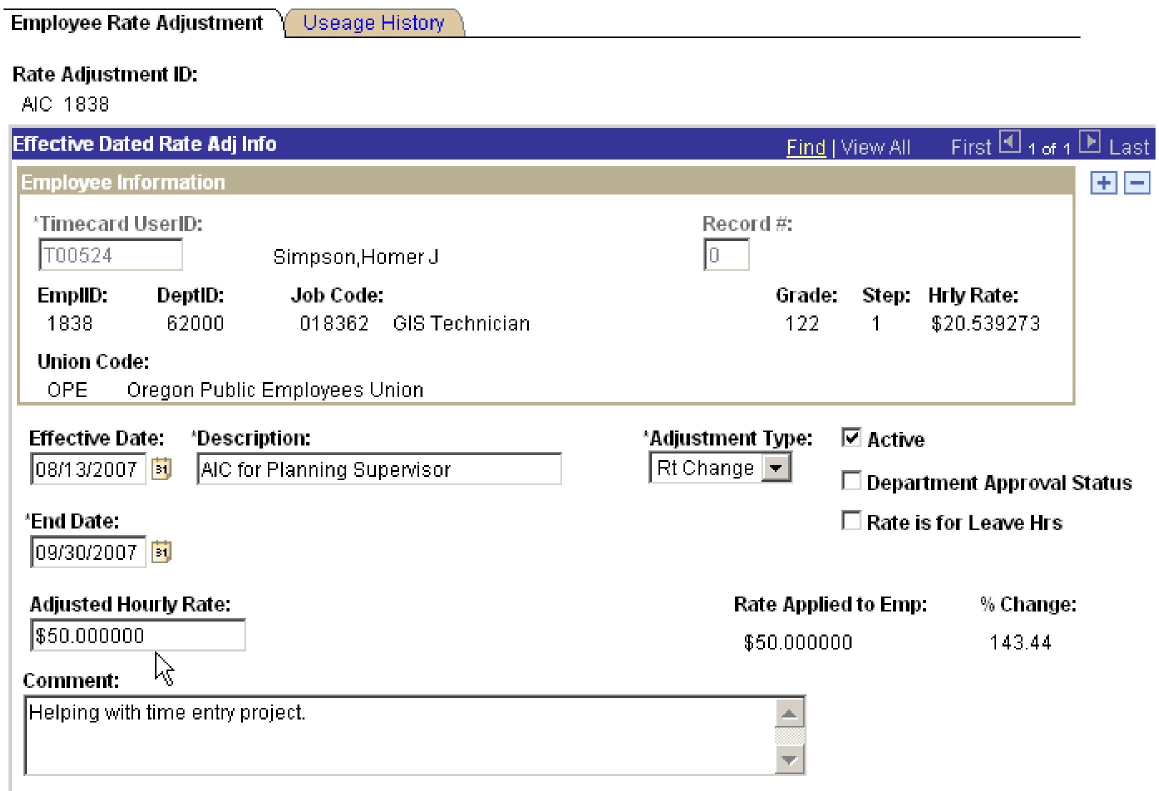
Fill in the Begin and End dates, add the description and include the **5.00** percent.

Job Code Override:



Job Code Override gives you the flexibility to assign a step other that 1 to the AIC

Rate Change:



Rate change allows you to assign a specific hourly rate of pay.

If the time has passed on the AIC effective and end date, it will give you a message of EXPIRED

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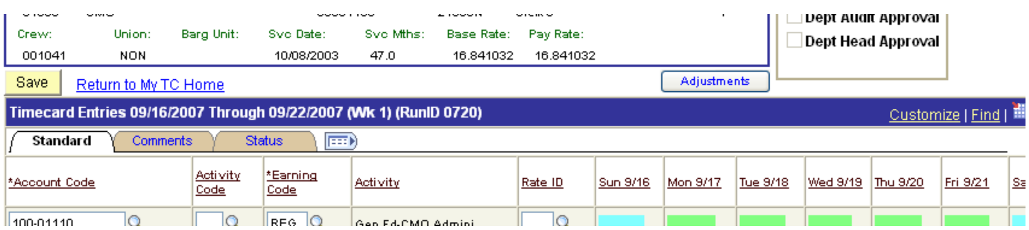
Employee Adjustments

If something was missed on an employee's pay after the employee has been paid, there needs to be an adjustment to the employee timecard on the next pay period. This adjustment is done through the adjustment page on the employee timecard.

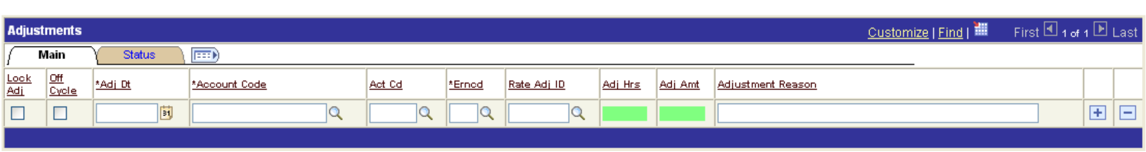
Navigate to SPR Timecards > Administer Timecards

Enter in the current Pay Run ID and click on the Refresh button. The TC Group should be entered already for you as your current department.

Click on the View TC link for the employee that needs to have the adjustment made.



Click on the Adjustments button on their timecard page.



The page will come up that allows you to enter in the adjustment.

1. Enter in the adjustment date. This is the date that the hours or amount should have been given.
2. Enter in the account code.
3. Enter in the earning code that the hours or amount should have been charged to.
4. Enter in the Adjust Hours or the Adjust Amount.
5. Enter in the reason for the Adjustment.
6. You can click on the lock adjustment that will lock this adjustment so no one else can change it.
7. Click on the Save button to save this adjustment.
8. The Adjustment button on the timecard will turn red for the employee so they can then check on the button and view only the adjustment that was entered.
9. This adjustment will then be paid in the pay period that the adjustment was entered in but the adjustment hours or amount will be posted to the time period that it was supposed to be earned.

New Employee Setup

- When a PAF is processed for a new employee. Payroll will enter them into the HRMS system and create a new emplid. An email will be sent to the Dept. Admin person and the IT dept.

- After the nightly refresh the Profile should be created for the new hire.

- The dept. admin person will then go in and set up the employees crew and account codes as needed.

- IT will create the People Soft log in and password for the employee.

- New Hire Orientation will take place on their first day at a specified time
  The usual paperwork from HR and Payroll will be filled out, then a hands-on computer orientation of Employee Self Service and Time Entry will be given.

- If possible, the IT department will also do their Outlook training at this time.

PAF Change List

Required PAF
Hire
Termination
Merit Increase
Promotion
Reclass
Position Change
Org. change
Additional Pay

No Longer Required	Handled in Time-Entry System
Reports To	"CREW" set up in Profile
FMLA	Set up in Leave Request
OFLA	Set up in Leave Request
LWOP	Set up in Leave Request
AIC	Create Record in Rate-Adjustment
Admin Leave	Set up in Leave Request
Military Leave	Set up in Leave Request

EMPLOYEE

Time Entry Approval

Training Guide

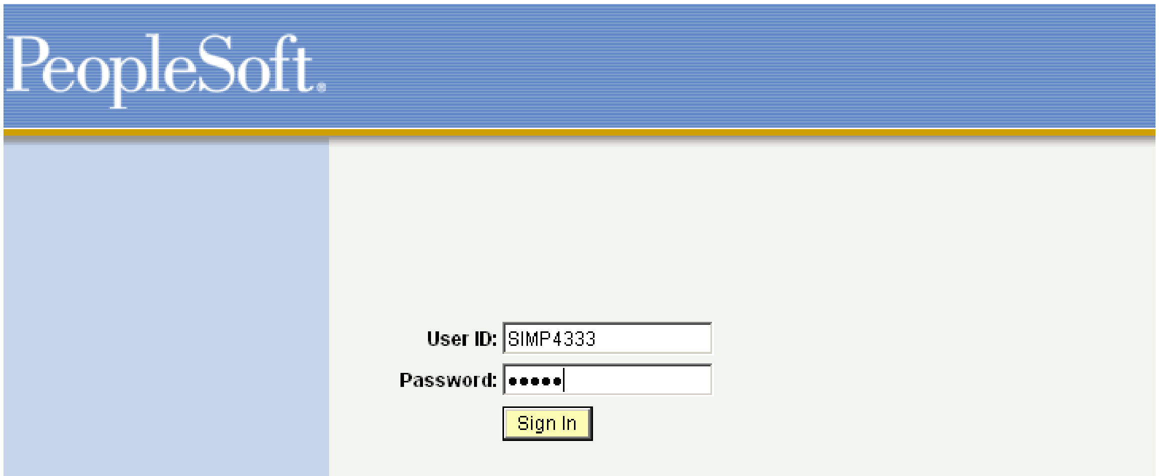
Reaching and Logging on to PeopleSoft HRMS

4. Launch the browser (Internet Explorer) 

and navigate to Springboard. http://springboard

2. From Springboard, you will Select Employee Self Service by clicking on the picture or the "Employee Self Service" text.

The PeopleSoft sign on page should then display and you can sign-on to the PeopleSoft system. Your ID and PASSWORD must be entered in UPPERCASE.



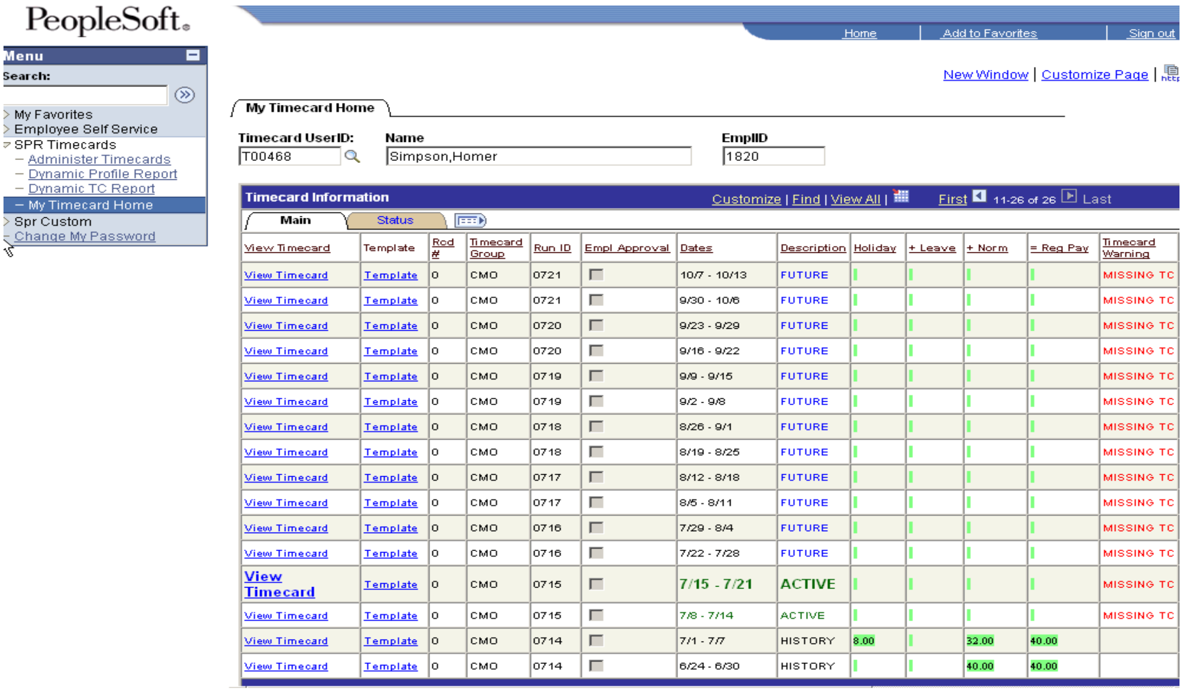
Accessing your Timecard

After you login, click on SPR Timecard and then on My Timecard Home by using the left-hand navigation menu. The "My Timecard Home" page shows a summary of all the timecards that you have available to you. This is a *view only* page. There are 3 types of timecards:

Future – timecards for a future date

Active – the current 2 week time period

History – timecards from the past

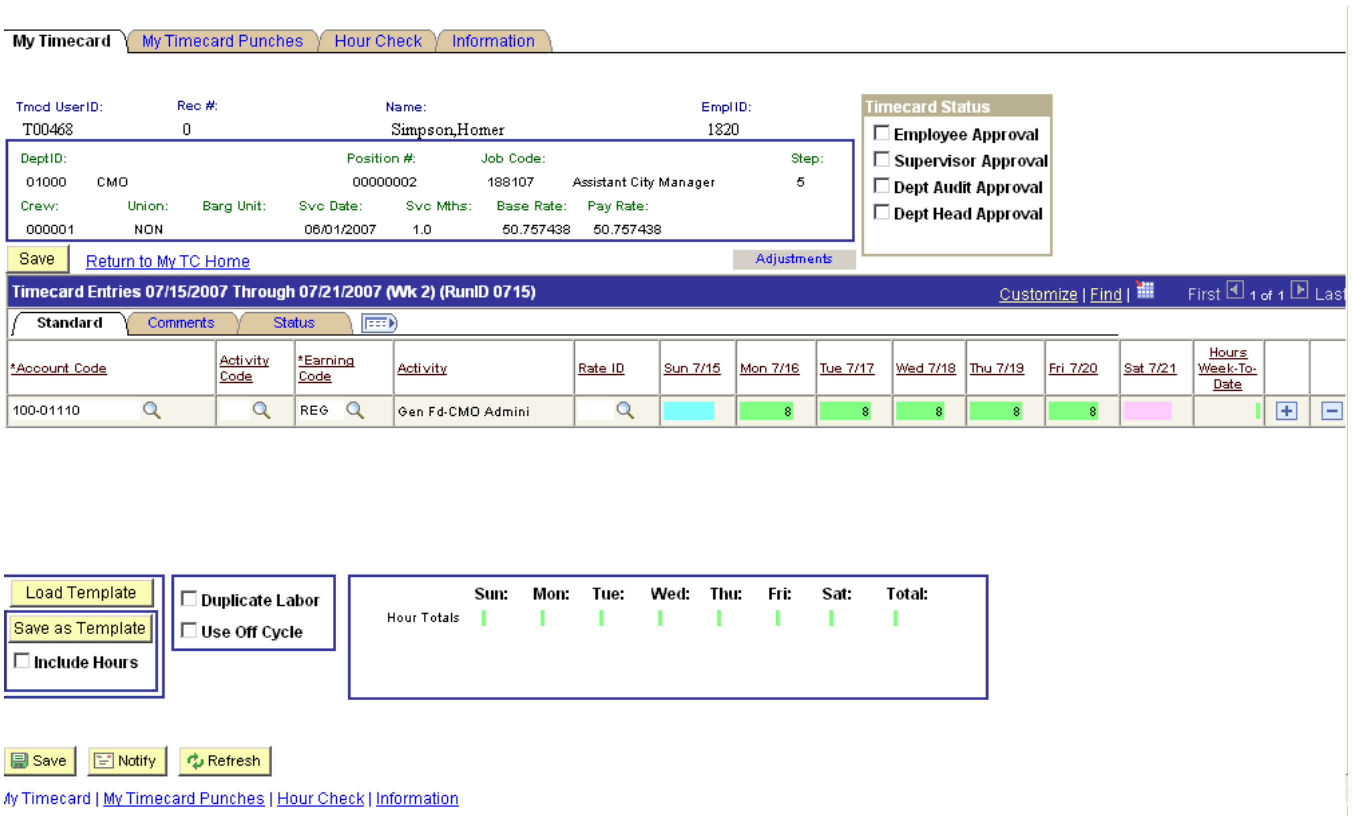


View Timecard	Template	Rcd #	Timecard Group	Run ID	Empl Approval	Dates	Description	Holiday	+ Leave	+ Norm	= Reg Pay	Timecard Warning
View Timecard	Template	0	CMO	0721		10/7 - 10/13	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0721		9/30 - 10/6	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0720		9/23 - 9/29	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0720		9/16 - 9/22	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0719		9/9 - 9/15	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0719		9/2 - 9/8	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0718		8/26 - 9/1	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0718		8/19 - 8/25	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0717		8/12 - 8/18	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0717		8/5 - 8/11	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0716		7/29 - 8/4	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0716		7/22 - 7/28	FUTURE					MISSING TC
View Timecard	Template	0	CMO	0715		7/15 - 7/21	ACTIVE					MISSING TC
View Timecard	Template	0	CMO	0715		7/8 - 7/14	ACTIVE					MISSING TC
View Timecard	Template	0	CMO	0714		7/1 - 7/7	HISTORY	8.00		32.00	40.00	
View Timecard	Template	0	CMO	0714		6/24 - 6/30	HISTORY			40.00	40.00	

View Timecard

You can access any of your Future, Active or Historical timecards that are shown by selecting the "View Timecard" link next to the week you wish to view. The line with Enlarged Fonts and green in color represents the active weeks. History is in black and the future rows are blue.

Here is a copy of what your weekly time card will look like.

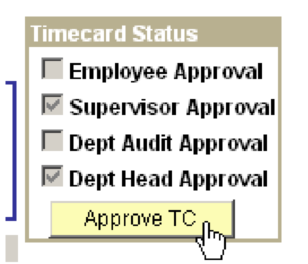


Employee Approval

Your supervisor will currently do your time entry each week. They will do their approval and send your timecard on to the Dept. Head. Once the pay period is complete, click on the 

button to "electronically" sign your timecard.

Historical Timecard Approval



Profile:

Profiles

Profiles is the page that is used for every employee to track different information that is needed for timecards. It can also be used for contractors, volunteers, etc. Those records will not come over to pay sheets but be held in timecards for tracking and reporting purposes.

The effective date is very sensitive for employees. If an employee is transferred to another department, it affects their timecard displays. Make sure and put in accurate effective dates if an employee is being transferred or is taking another job.

The profile sync job should be run every night to create or update the profile records. You can create a profile record if the employee record has not been created yet.

Once a profile is created, you will need to add the labor codes, crew and holiday hours for that employee.

If a person cannot login, it is probably because their profile user id is not the correct user id. Go into their profile and make sure their userid is the first four characters of their last name and ~~the last 4 digits of their social security number~~ their employee identification number. If it isn't, change it, save the record and the employee should then be able to login.

People Soft HRMS

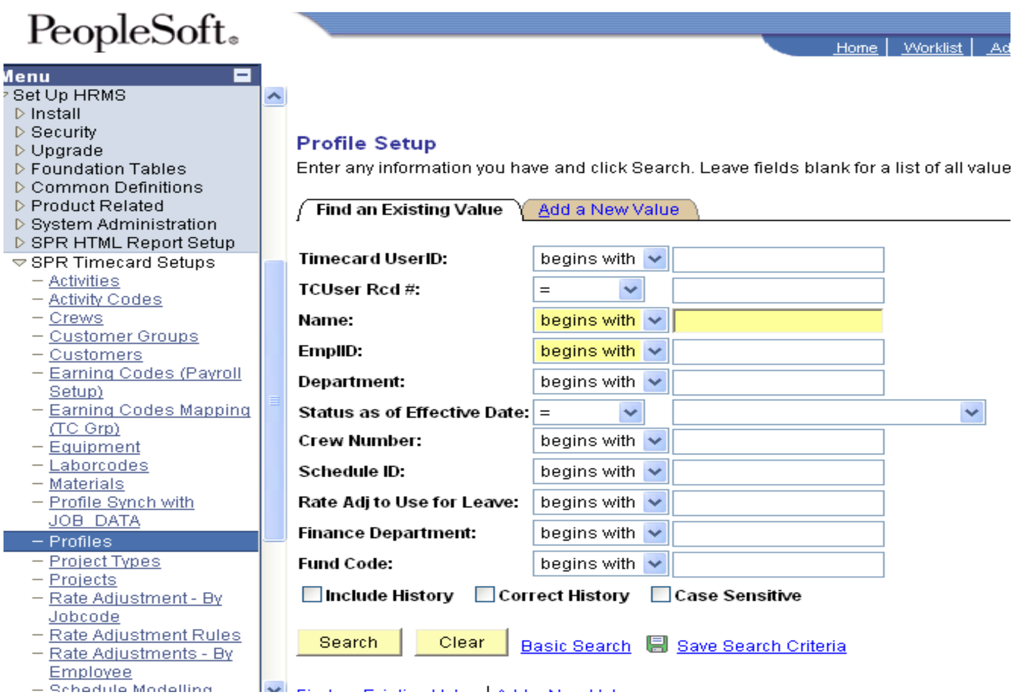
Set up HRMS

SPR Timecard Setups

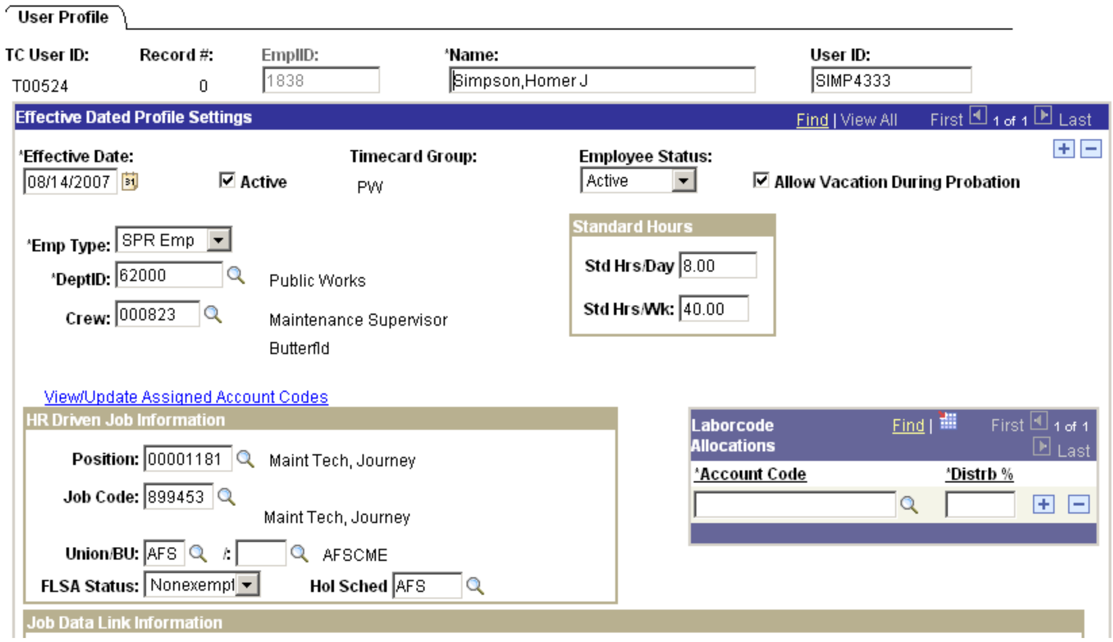
Profiles

Every employee paid through the People Soft system will have an individual Time Card and Profile. Profiles is where you will set up the parameters for an employee's timecard. Most information will come over from PS job data in a nightly refresh process, but you can update this page or create a new hire if needed. The effective date is very sensitive for employees! If an employee is transferred to another department, or is taking another job, the date will affect their timecard. Always add a row to update information, this builds a history file.

Enter the employee's ID number or name in the "Existing Value" tab.

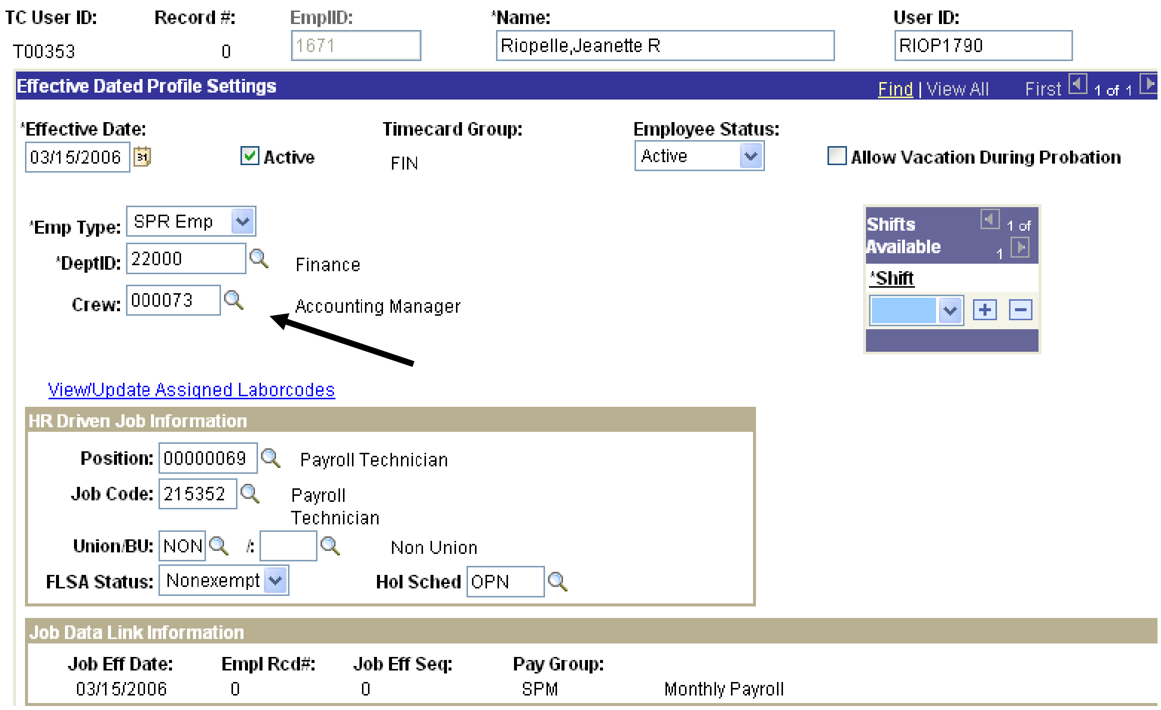


This is where you will put each employee into a Supervisor's Crew.



An employee not assigned to a **Crew** yet, will say “NEW”

Click on the magnifying glass and all Crews available to your department will come up for selection. Click the supervisor that will be reviewing this employee’s timecard and SAVE.

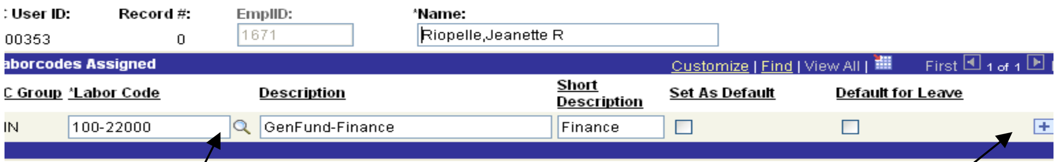


Labor Codes:

After setting up an employee in a specific crew, the next step is to assign Labor Codes to the employee. The purpose of assigned labor codes, is to minimize the options a person has to choose from in order to fill out their timesheet, creating a more simplified and efficient system. There are over 20,000 account codes in the PS system, and we want to reduce the confusion and possibility of errors.

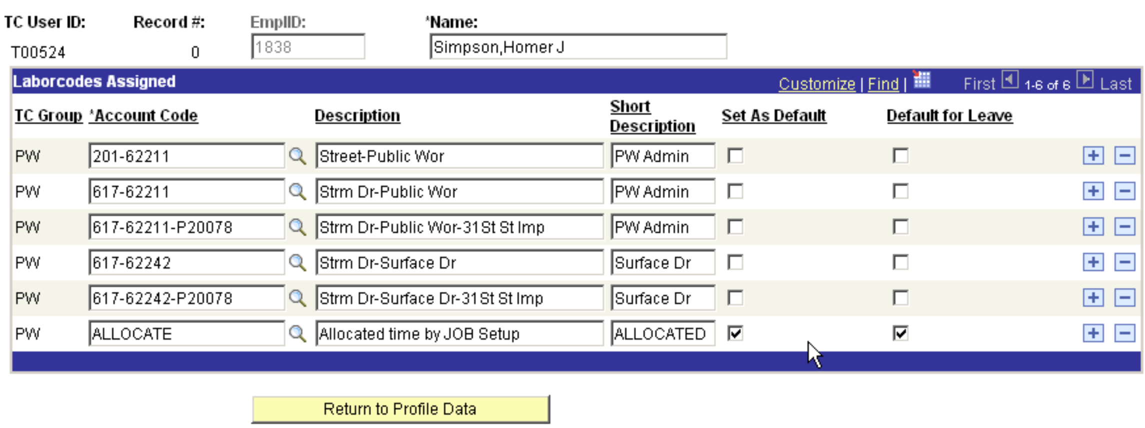
Click on the following link displayed in the center of the Profile Page:

View/Update Assigned Laborcodes



Add a row for each labor code the employee needs to have shown on their timecard.

Use the drop-down box for account code look ups.



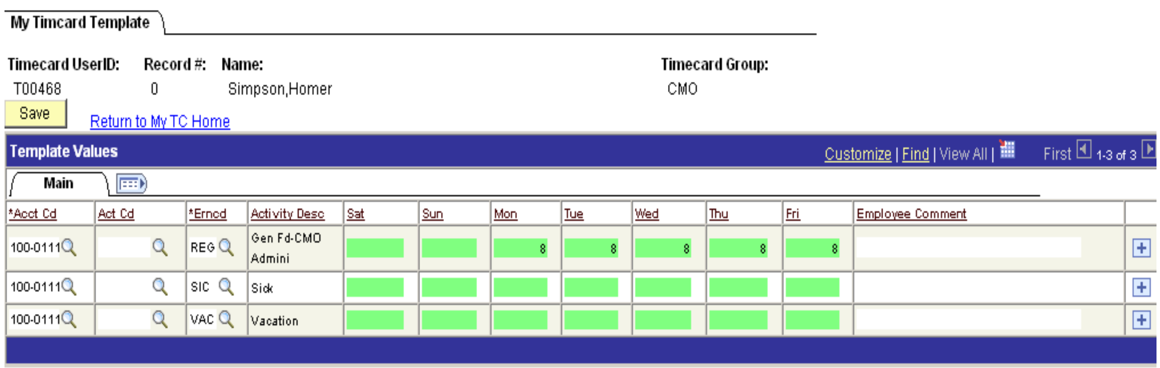
Make sure that one account code, either their default or ALLOCATE, has both boxes checked. This will ensure that an account code will always show up on their timecard.

Click on “Return to Profile Data”, click SAVE.

Template Documentation

Timecard Template

The Timecard Template is a tool that an employee can use to simplify their timecard entry. If you have created a template for yourself, then it will automatically be entered for you each time you enter a timecard page to put in your time. You could then enter only exceptions in your actual timecard if needed to complete your timecard efficiently. You can also use the template as a starting point by having most of the information you need to enter in your timecard.



General Information

Your template can be reached from your My Timecard Home page. You can only save one template. If you want to create a new template, you create your timecard and then save your template again.

Columns

The columns in the template should be the same as those found in your timecard except there are a few columns that are only entered in at the timecard page so they will not show here in the template.

Hour Information

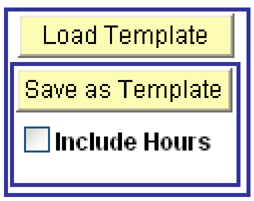
Hours are optional. It is perfectly acceptable to create a template of the Account codes, earncode, etc that you typically use during a week, but wait until the actual timecard to enter the hours. Do not enter any hours in your template for sick or vacation. You should only save hours to your template for regular hours.

Save Template

Click on the Save button in the template page to save this template. You only have one template. If you have a template already, it will give you a message asking you if you would like to overwrite the current template.

Load Template

The load template button is located on the My Timecard page on the bottom left. The Load template button is used to reload your template if you have messed up entering in your timecard and want to start over again. In order to load your template if you have entered in hours already, you need to delete all of the rows. It will not load your template if you have rows and hours in.



Save as Template

This button will save the current timecard that you are viewing as your template. You may want to do this when you have changed account codes and want to start using a new template to start your timecard entry.

The Include Hours button allows you to save your new template with the hours that you have entered. If you do not check this button, it will only save the template with the account codes, earnings codes, etc and not any hours.

You only have one template. If you have a template already, it will give you a message asking you if you would like to overwrite the current template.