TA362: Time & Attendance Employee Self Service

Web Based Training

Revised 1/31/2013

Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

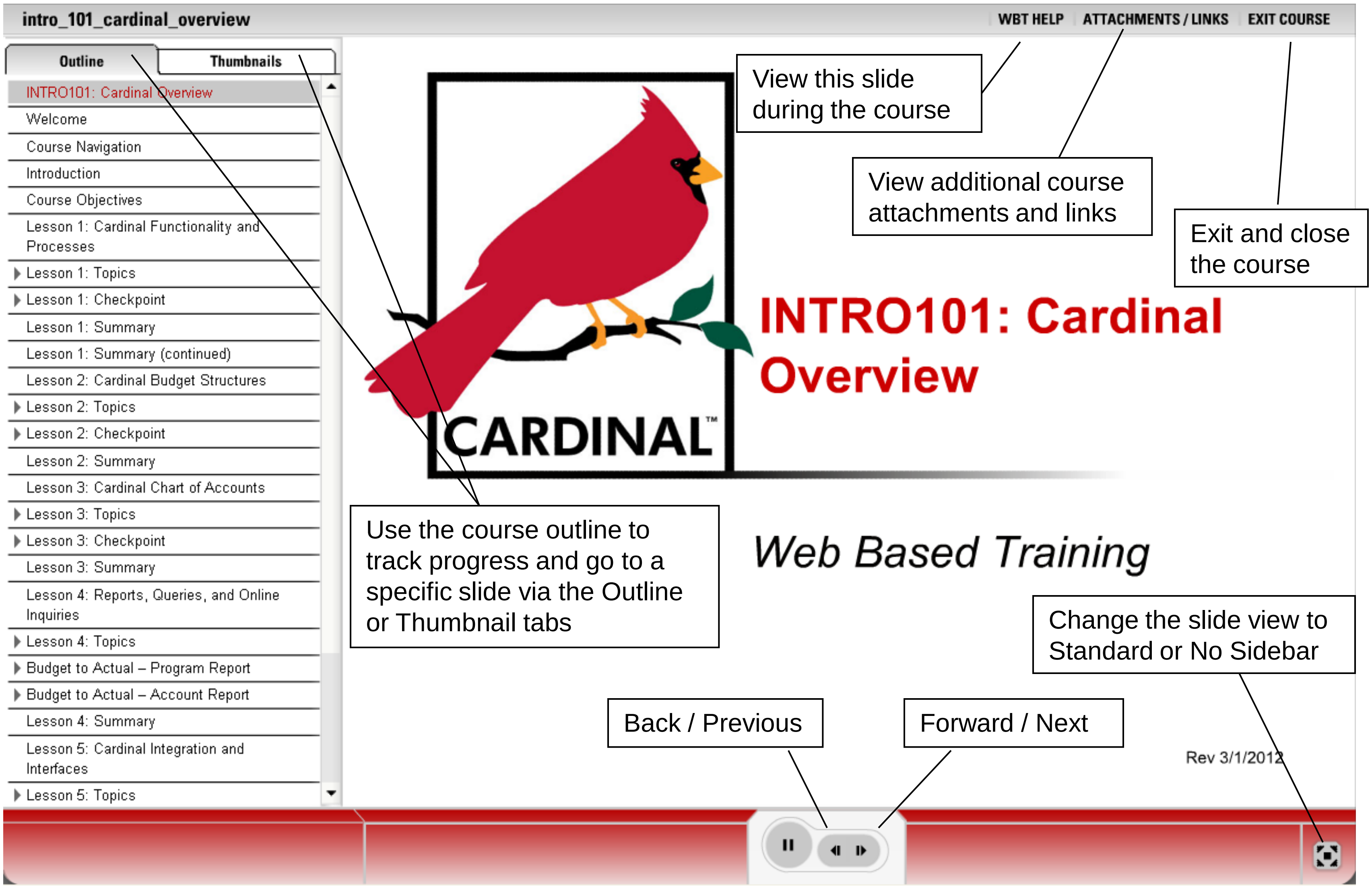
In this course we will show you the Time & Attendance functional area and how to enter and submit time and absences for approval.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your Agency Security Handbook for a list of available roles and descriptions.

Special Notice

This course provides employee training on how to enter time on a timesheet, view absence entitlement balances and enter absence requests. Managers who are responsible for approving employee time and absence requests should also take the Time & Attendance Approvals course.

Course Navigation

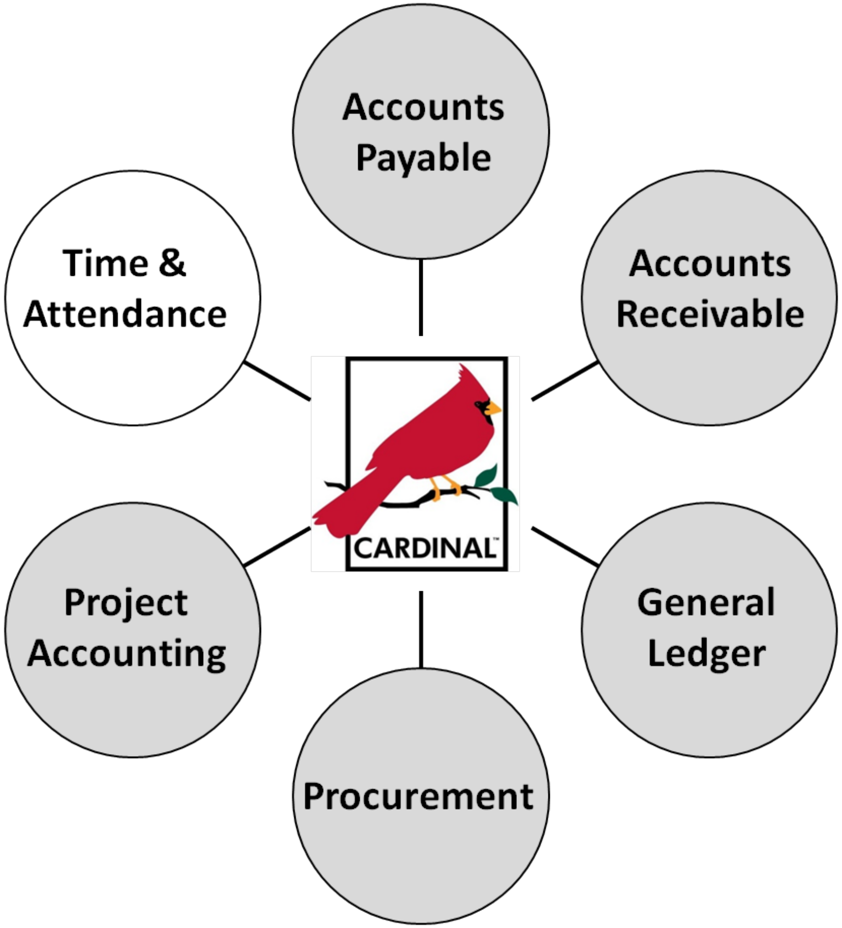


Introduction

Cardinal has six functional areas:

- Accounts Payable
- Accounts Receivable
- General Ledger
- Procurement
- Project Accounting
- Time & Attendance

Time & Attendance is the functional area in Cardinal that tracks employee time and absences



Introduction (continued)

These six functional areas are housed in two distinct Cardinal applications:

Cardinal Financials: This application houses the Accounts Payable, Accounts Receivable, General Ledger, Procurement, and Project Accounting functional areas.

Human Capital Management (HCM): This application houses the Time & Attendance functional area.

Course Objectives

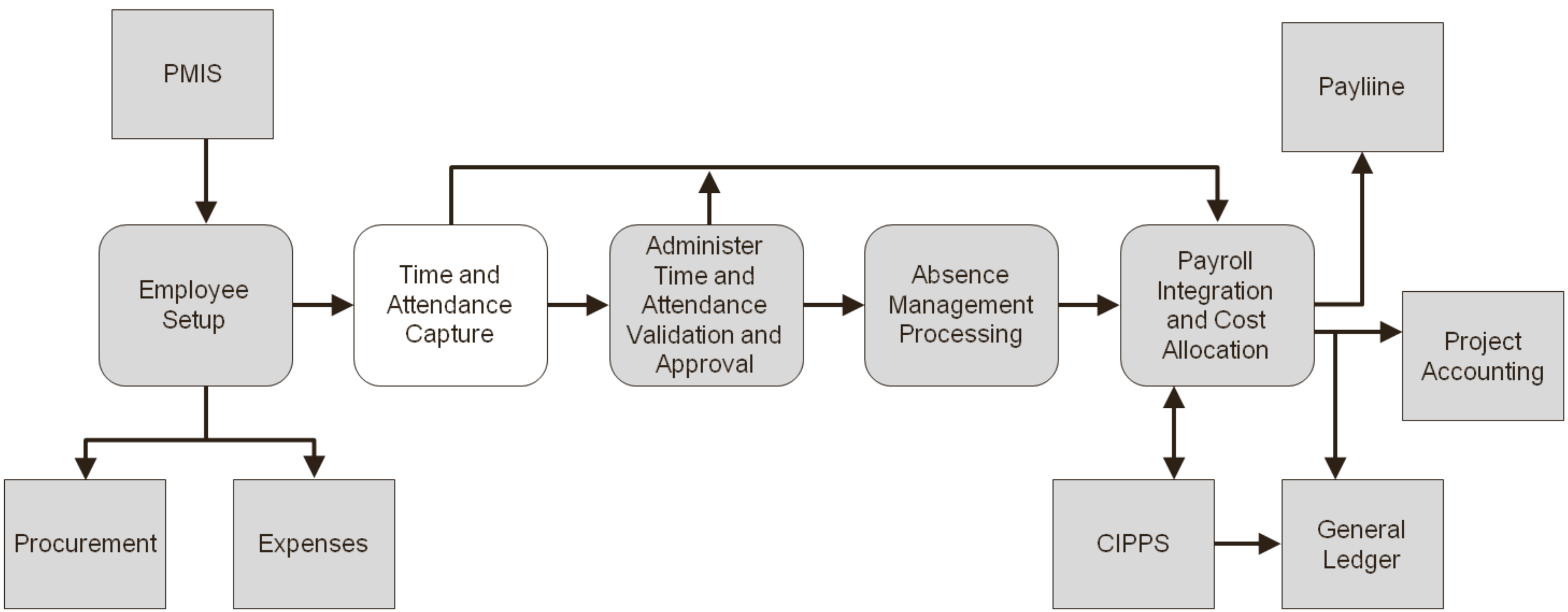
After completing this course, you will be able to:

- Understand key concepts and define key terms related to Time & Attendance.
- Navigate to Cardinal HCM and the **Timesheet** page.
- Enter regular and overtime hours on the timesheet.
- View compensatory leave and overtime leave on the timesheet.
- Document holidays.
- View current Absence Entitlement Balances.
- Enter Absence Requests.
- Adjust Absence Requests.
- Understand the reasons for timesheet exceptions.
- Make timesheet adjustments.
- Access key reports and online inquiries.

Assessment questions at the end of each topic and/or lesson will check for your understanding.

Time & Attendance Process

The diagram provides an overview of Time & Attendance process. As a self service user, this course will focus on the Time & Attendance Capture area.



Lesson 1: Overview

In this lesson, you will learn about the following topics:

- Key Concepts
- Key Terms

Key Concepts

Some key concepts in Time & Attendance Employee Self Service include:

- Every employee has a work schedule in Cardinal.
- Hourly employees have a work schedule with zero hours.
- The timesheet displays one week at a time.
- Self Service users must enter hours worked by day, Time Reporting Codes, and ChartField information for time entered on the timesheet.
- Cardinal forecasts your entitlement balances for most leave types when you enter your absence request. That forecast is based on the projected future absence entitlement balance for that leave type and all prior absence requests for that absence type.
- Absence requests may cross a weekend or a month end but should not cross a pay period end date.
- You can only use one absence type per absence request.

Key Terms

Business Unit

ChartFields

Self Service

Self Service User/Time Repor...

SpeedType

Time Reporting Code (TRC)

Timesheet Page

Work Schedule

General and Timesheet Entry Related

Click each term listed in the left display window to view its definition.

Key Terms (continued)

Exception

Lockout

Payable Time

Reported Time

Reported Time Status

Submitted Time

Time Administration

Time Reporting Rules

Timesheet Processing Related

Click each term listed in the left display window to view its definition.

Key Terms (continued)

- Absence Entitlement
- Absence Event
- Absence Name
- Absence Reason
- Absence Take
- Accrual Periods
- Entitlement Balance

Absence Entitlement Related

Click each term listed in the left display window to view its definition.

Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer and click **Submit** to see if you chose the correct response.

Match the definition with the appropriate term by choosing it from the drop down selection list. Each term should only be used once.

A batch process that validates reported time against Time Reporting Rules and generates payable time. Also may generate exceptions to reported time.

-- Select --

The days and hours an employee is scheduled to work. Used by Cardinal to validate time during the Time Administration process.

-- Select --

Lesson 2: Navigating in Time & Attendance

In this lesson, you will learn about the following topics:

- Navigating in Time & Attendance

Navigating in Time & Attendance

Cardinal Coordinators are responsible for setting up and modifying user access. New users must complete training for the role(s) they are assigned in Cardinal, prior to gaining access. Your Cardinal Coordinator can help you determine your role(s) and training needs. Check with your Supervisor if you do not know who is designated as your Cardinal Coordinator. For more information on navigation, see the **Navigation in Cardinal** course.

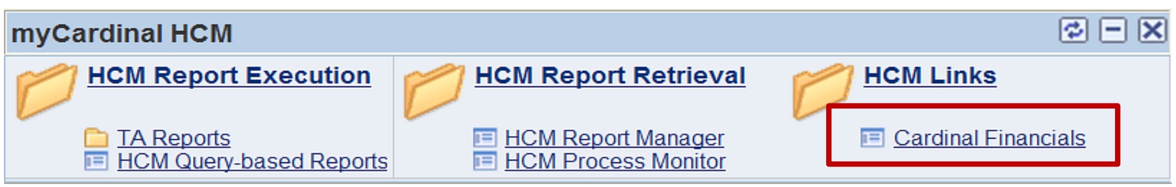
Cardinal Financials and Cardinal HCM are accessed from the Cardinal website address: https://cardinal.cov.virginia.gov. There is a shortcut icon installed on your desktop for quick access.

Accessing Cardinal HCM

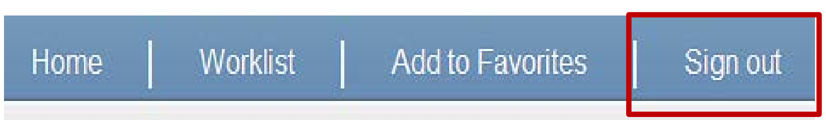
When you log in on your computer, you can access Cardinal by double clicking the Cardinal icon on your desktop. The **myCardinalFinancials** page appears.

Next, click the **Cardinal HCM (Human Capital Management)** link to access **Cardinal HCM**.

You can go back to the Cardinal Financials home page by using the links available in **Cardinal HCM**.



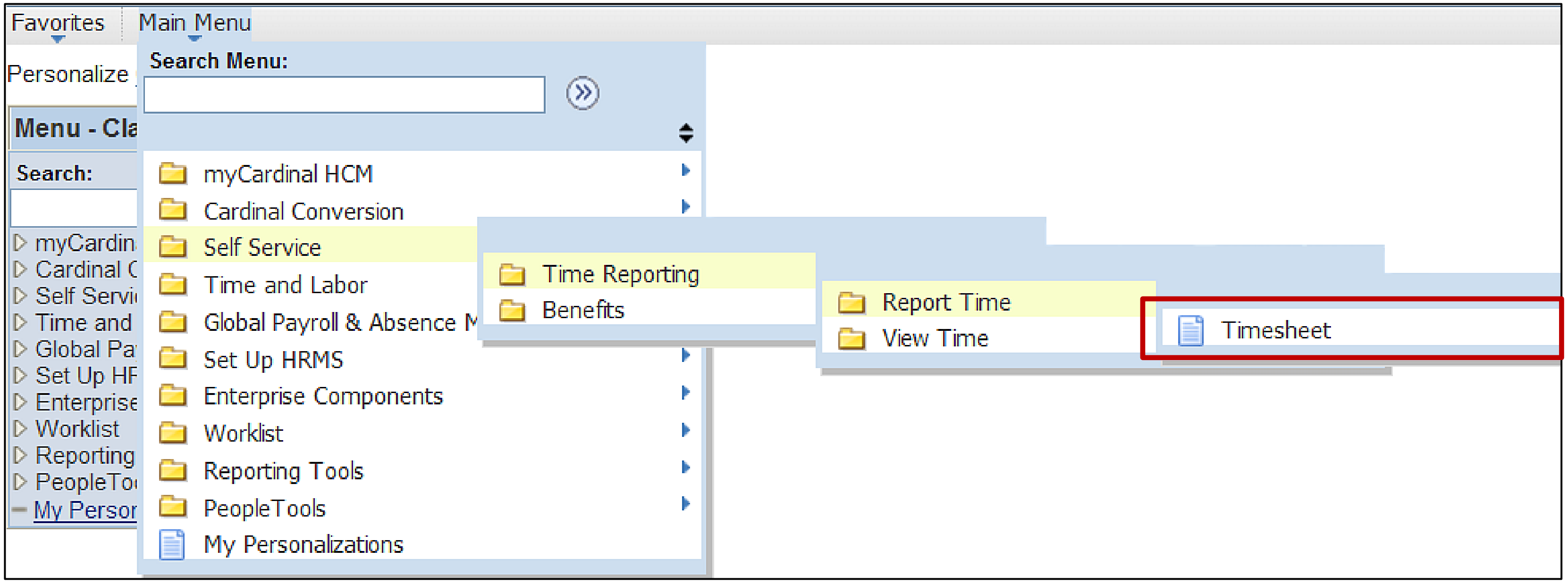
Click the **Sign out** link to exit Cardinal. Do not close the browser window to exit.



Accessing the Timesheet Page

Once you access Cardinal HCM (Human Capital Management) Home page, you can navigate to the **Timesheet** page using the following steps:

- Click on **Main Menu**
- Point to **Self Service**
- Point to **Time Reporting**
- Point to **Report Time**
- Click on **Timesheet**, the link to open the **Timesheet** page



Simulation: Navigating in Time & Attendance

This simulation shows you how to navigate to the Time & Attendance functional area. Click the Cardinal logo below to start the simulation.

Lesson 2: Summary

In this lesson, you learned:

- Navigating to the Human Capital Management application and Time & Attendance functional area in Cardinal.

Lesson 3: Reviewing the Timesheet Page

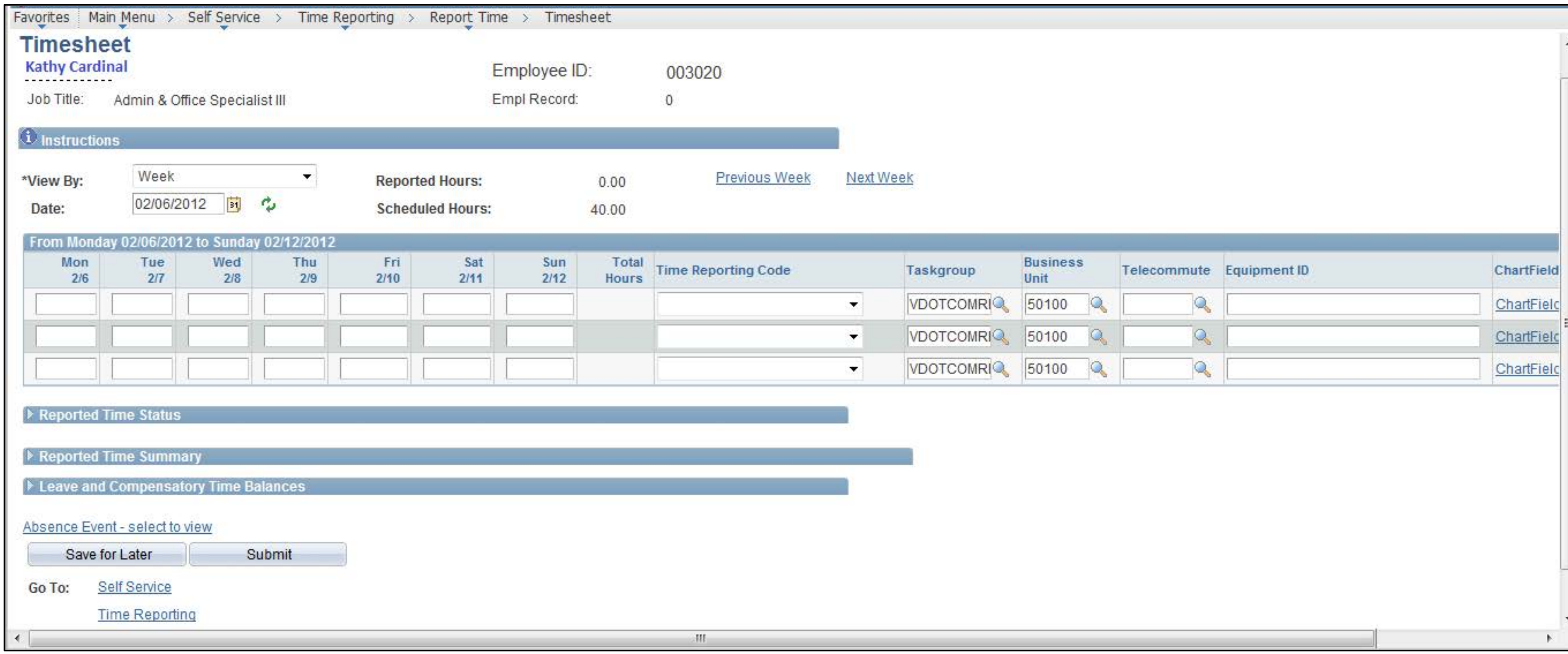
In this lesson, you will learn about the following topics:

- **Timesheet** page

Timesheet Page

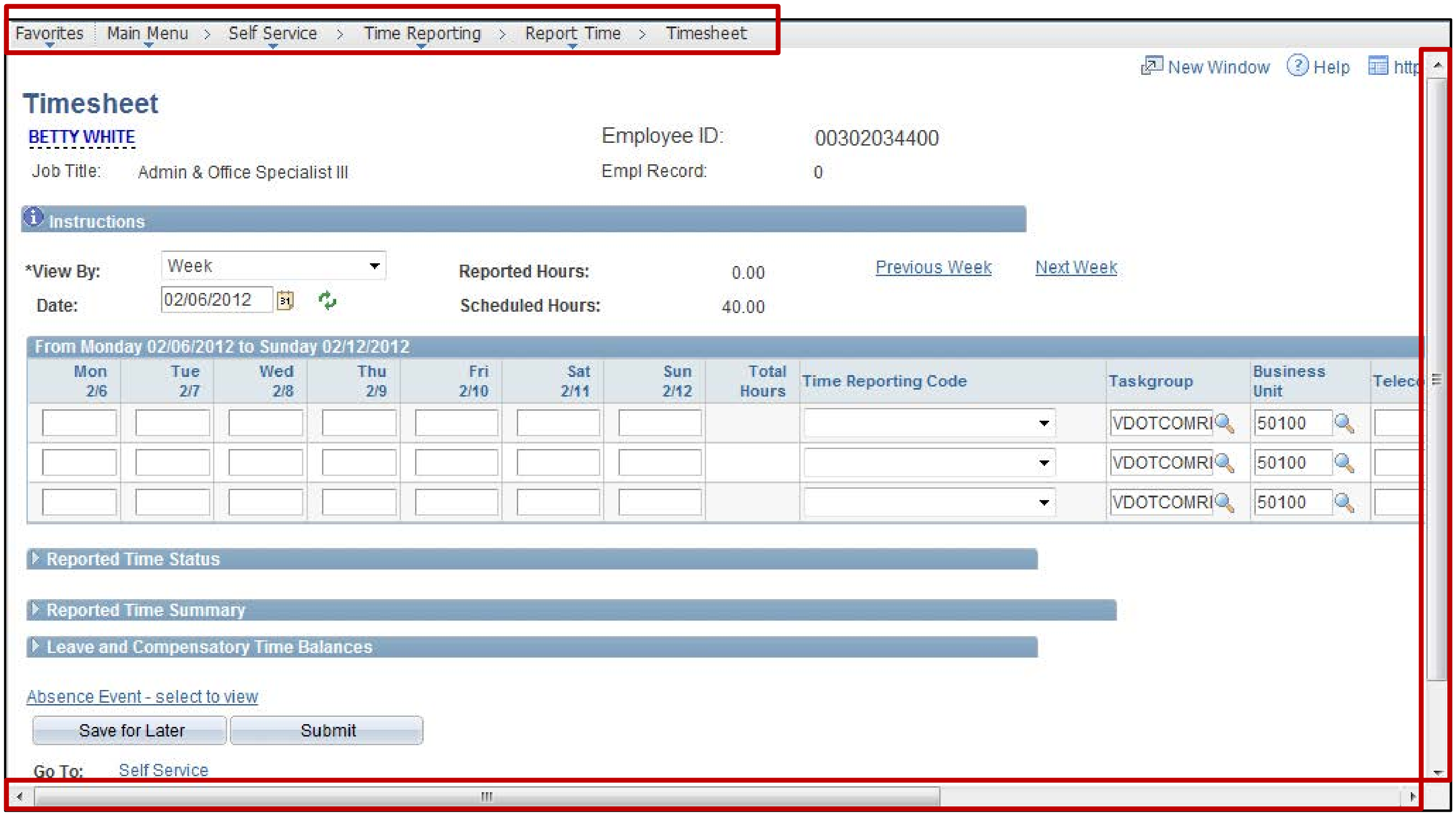
The **Timesheet** page is your one stop location to view and manage time. You can navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > Report Time > Timesheet



Navigation Path and Scroll Bars

Cardinal provides breadcrumbs at the top of each page that show the navigation path for that page. There are scroll bars to the right and bottom of the page. Use these to view data that extends beyond the width or length of the screen.



Header Section

The **Header Section** identifies the employee by name, **Employee ID** and **Job Title**.

Instructions Section

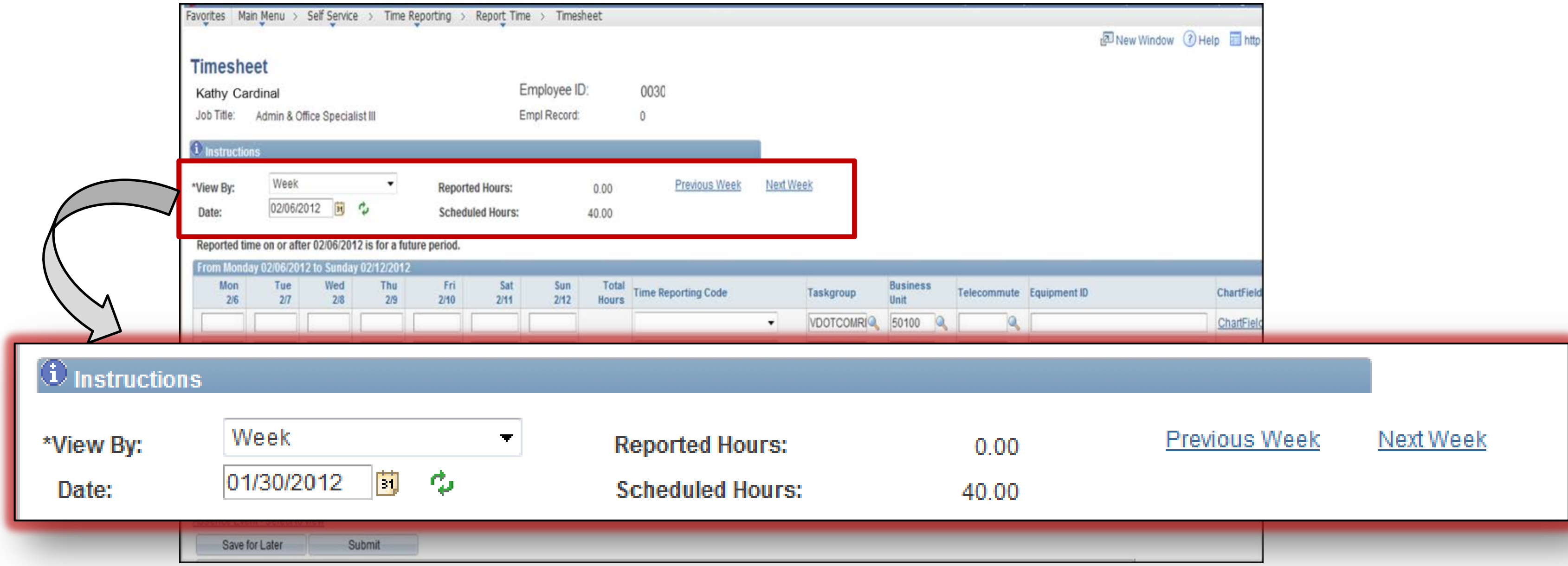
View By – Allows you to view the timesheet by day, week or an alternative calendar period. The default view of the timesheet is a weekly format.

Date – Allows you to enter or select a specific date, date in a week, etc. to be shown on the timesheet. Click on the calendar icon to open a calendar where you can select the month, year and day.

Refresh button – Updates the timesheet when you make changes to the **View By** and **Date** fields.

Previous Week – Allows you to view the previous week.

Next Week – Allows you to view the following week.



Timesheet Grid Section

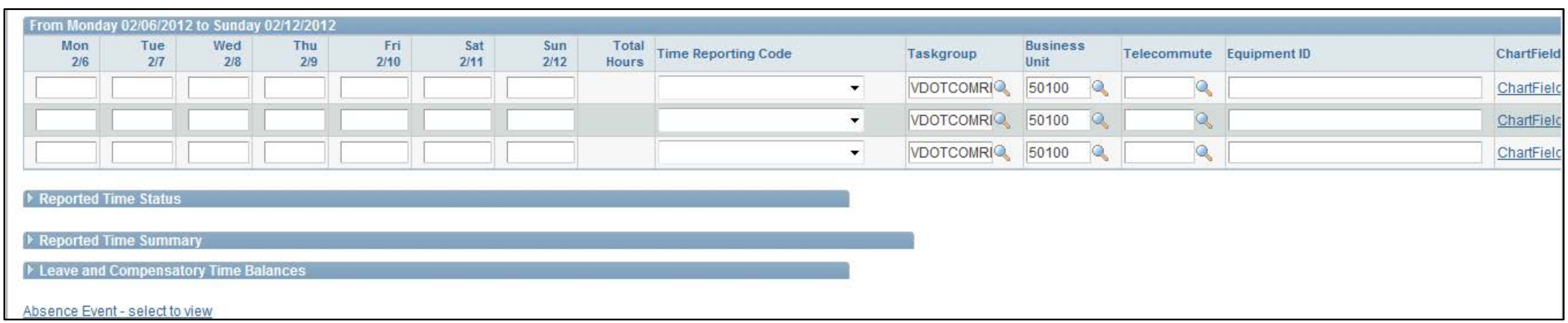
From Monday – Sunday Section – Provides rows and columns for entering your hours by day, **Time Reporting Code** (TRC) as well **Telecommute** and **Equipment ID** if applicable. It also contains the **ChartField** link which accesses the charge distribution entry pages.

Reported Time Status Section – Allows you to view the time you have entered by date and check on its status. For reported time/absences, the status displays as **Saved**, **Needs Approval** or **Approved**. For time entered in the timesheet grid the status displays as **Saved** or **Submitted**.

Reported Time Summary Section – Provides a one row summary of your time.

Leave and Compensatory Balances – Provides a summary of Compensatory and Overtime leave

Absence Event Section – Allows you to enter absences, view details about outstanding absence requests and check your absence entitlement balances.

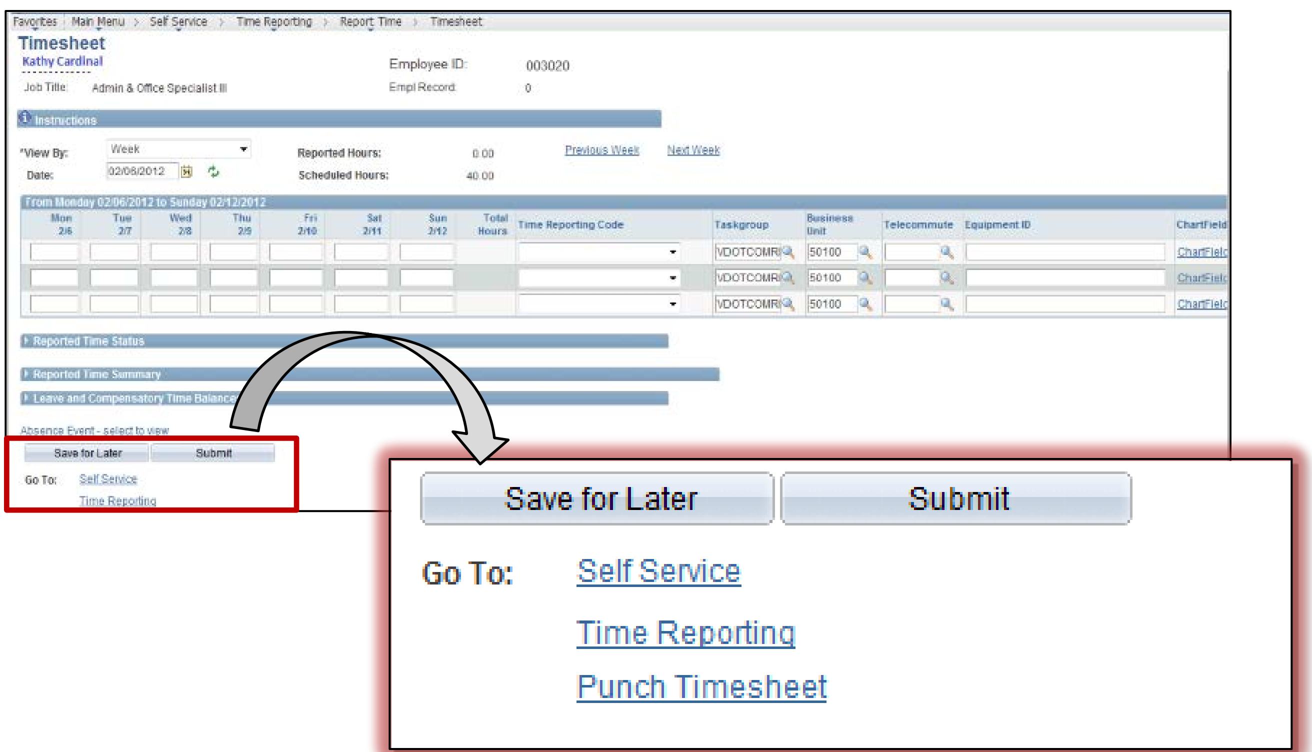


Buttons and Links

Save for Later – Saves entries on the **Timesheet** page. Note that saving your time places it on hold on the page and does not send it to be processed.

Submit – Submits time and absence entered in the timesheet grid to the Time Administration process and absence requests to the Supervisor for approval.

Go To Links – These links provide quick access to other Cardinal HCM pages (**Self Service** and **Time Reporting**). The **Punch Timesheet** link is not used.



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer, and click Submit to see if you chose the correct response.

The Time Entry section of the Timesheet page has a default display in which format?

- Monthly
- Weekly
- Daily

The navigation path to access the Timesheet page is:

- Time & Attendance > View Time
- Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Managing Your Time > Timesheet
- Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > Report Time > Timesheet
- Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Report Time > Timesheet

Lesson 3: Summary

In this lesson, you learned:

- The **Timesheet** page provides a one-stop location for managing time and absence related transactions.

Lesson 4: Entering and Viewing Regular Time, Overtime, Compensatory Time and Holidays

In this lesson, you will learn about the following topics:

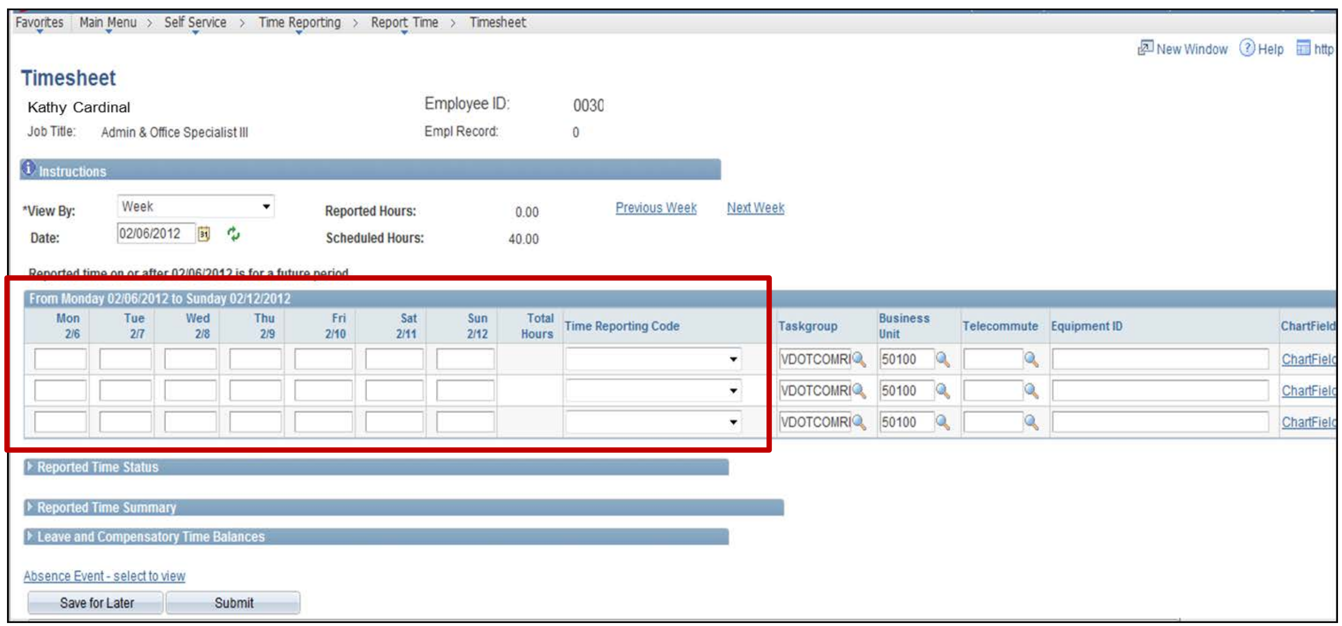
- Entering Regular Time and Overtime
- Viewing Compensatory and Overtime Leave Earned and Taken
- Viewing Holidays and Entering Floating Holidays
- Entering Office Closings

Entering Regular Time and Overtime

Cardinal provides a grid for you to enter your time. To record your time, you enter hours worked for each day of the work week. Time is entered in increments of one-tenth of an hour, e.g., 8.0, 4.5, 3.2, etc.

Cardinal allows you to enter time up to 90 days in the future. If 90 days from the current date falls in the middle of the week, you can enter time for that week. Cardinal greys out any timesheet which exceeds the 90 day timeframe.

The weekly time entry format allows you to enter multiple days for each unique combination of **Time Reporting Code** (TRC) and charge distribution, which reduces duplicate entry.



Time Reporting Codes

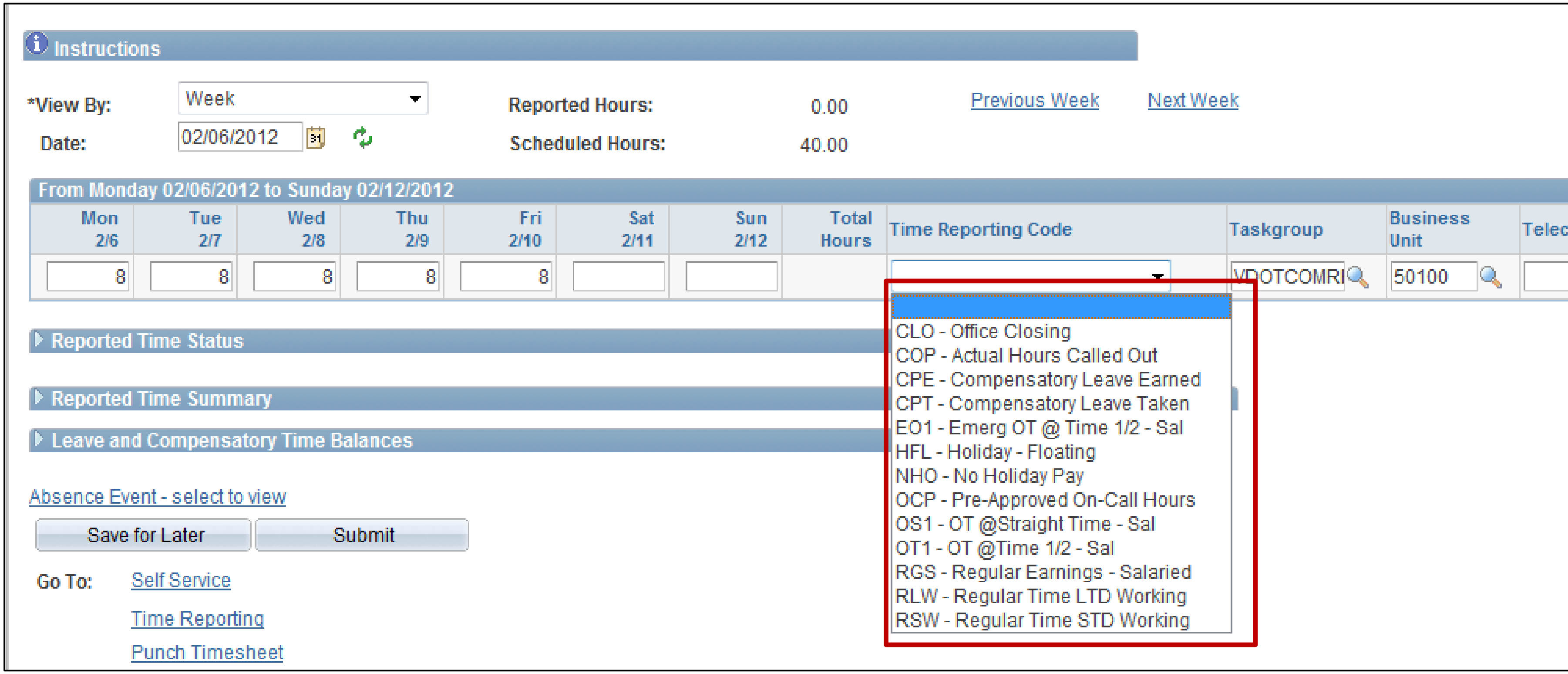
All hours entered on the timesheet are classified by TRCs which describe the nature of the time being reported. Select the **Time Reporting Code**(s) from those available for the hours worked. An employee's Workgroup determines which TRC's are available to them. All employees are associated with a workgroup.

Examples of Workgroups for VDOT employees are:

- **VDOTEMHRLY** – VDOT Emergency Hourly
- **VDOT EXCEPT** – VDOT Executive
- **VDOTEXTPB4** – Salaried Exempt Pay Band 4
- **VDOTEXTPB5** – Salaried Exempt Pay Band 5 & above
- **VDOTHRLY** – VDOT Hourly Employees
- **VDOTNOEXOT** – VDOT Salaried Non Exempt OT Leave Eligible
- **VDOTNONEXM** – VDOT Salaried Non Exempt

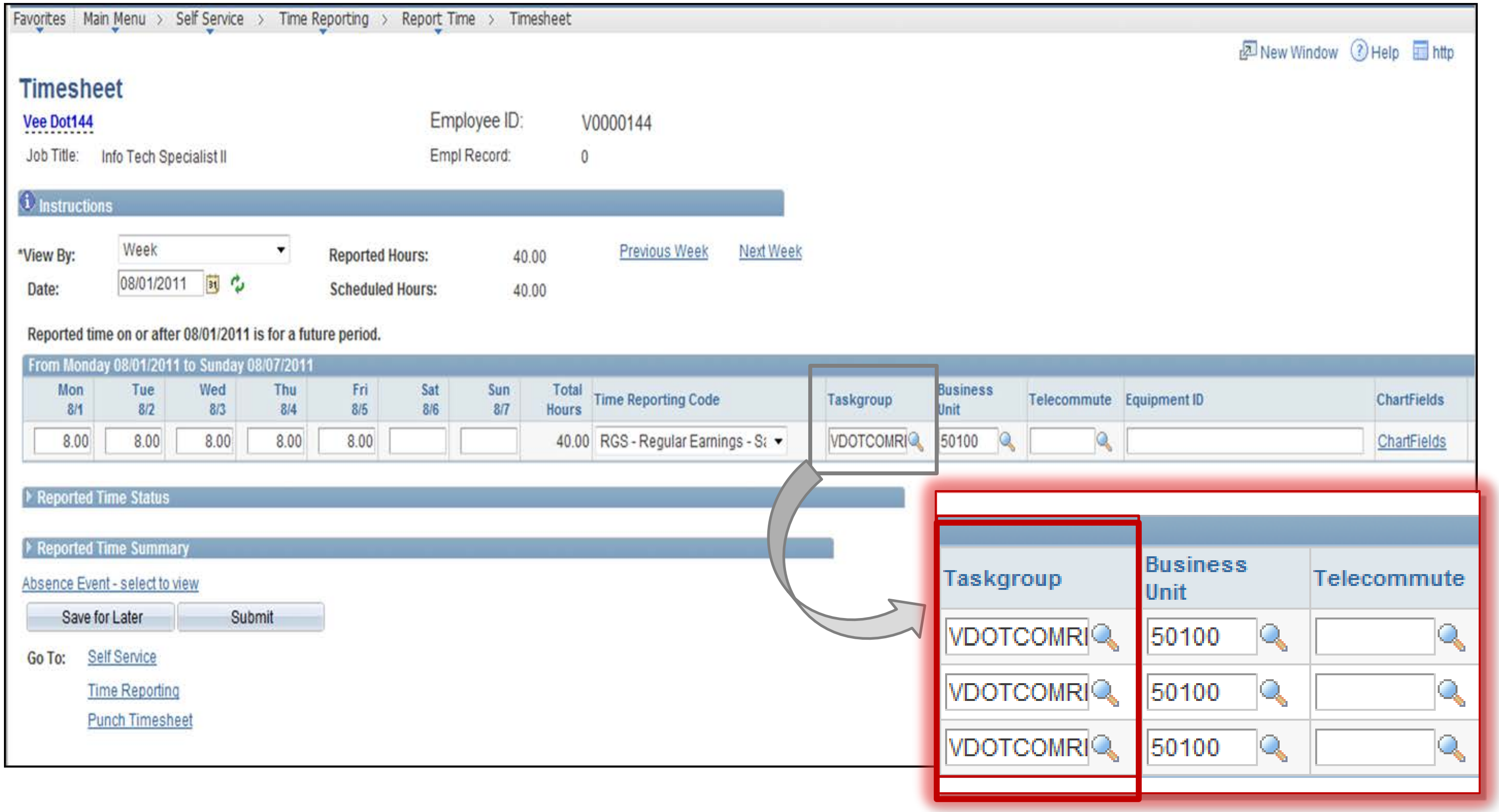
TRCs for compensatory and overtime earned and taken are entered on the timesheet and available only to employees who are eligible to earn/take it.

Time Reporting Codes (continued)



Task Group

The **Taskgroup** defines which fields are available on the timesheet. This field means employees must input a charge distribution for all time entered on the timesheet. The **Taskgroup** default value is **VDOTCOMREQ** and should not be changed.



Business Unit and Telecommute ID Fields

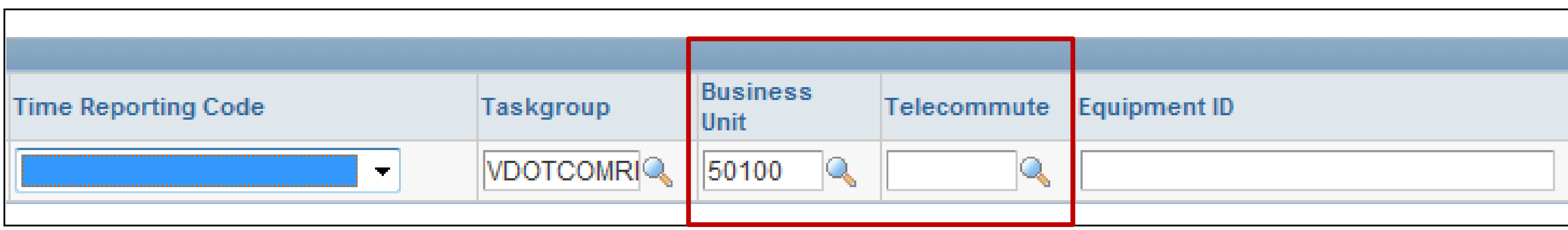
Business Unit Field

This is a required field. The Business Unit field defaults for your agency (e.g., 50100 for VDOT). Do not change it.

Telecommute ID Field

If you telecommuted, enter **TELE** in the **Telecommute ID** field. Otherwise, leave this field blank.

Please refer to the **Time Reporting Codes by Workgroup** job aid for details about the workgroups and time reporting codes available in Cardinal.



Equipment ID, ChartFields Link, Plus and Minus Buttons

Equipment ID Field

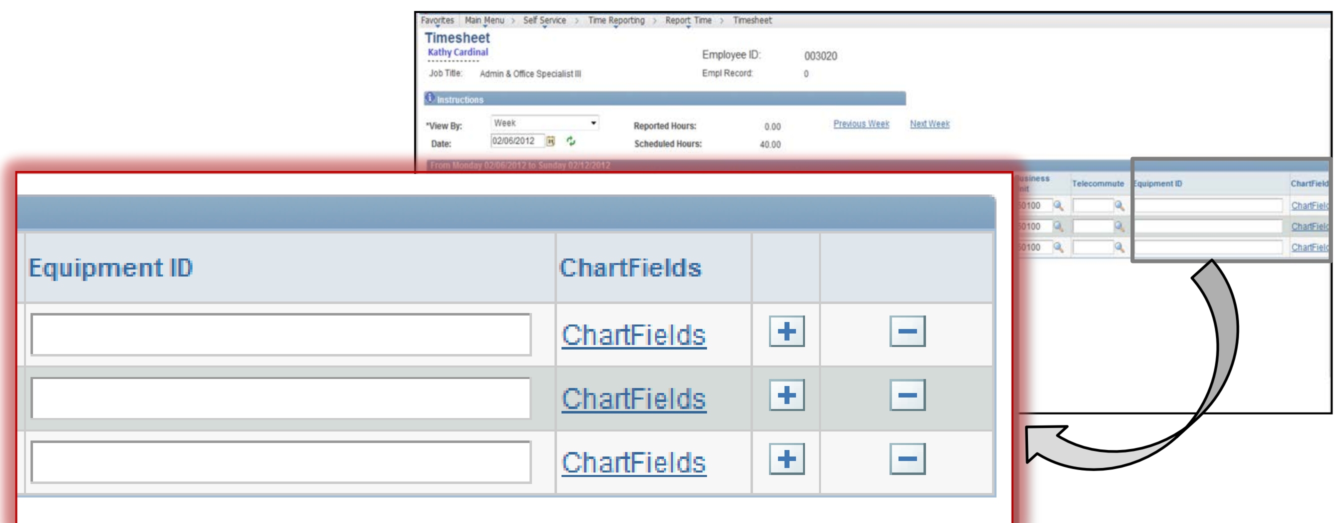
The **Equipment ID** field is used only for special events such as emergency snow operations or emergency response. Special instructions will be provided to employees when and if this field needs to be used.

ChartFields Link

Every line of reported time entered must have a valid TRC and charge distribution. Click on the **ChartField** link to access the charge distribution fields.

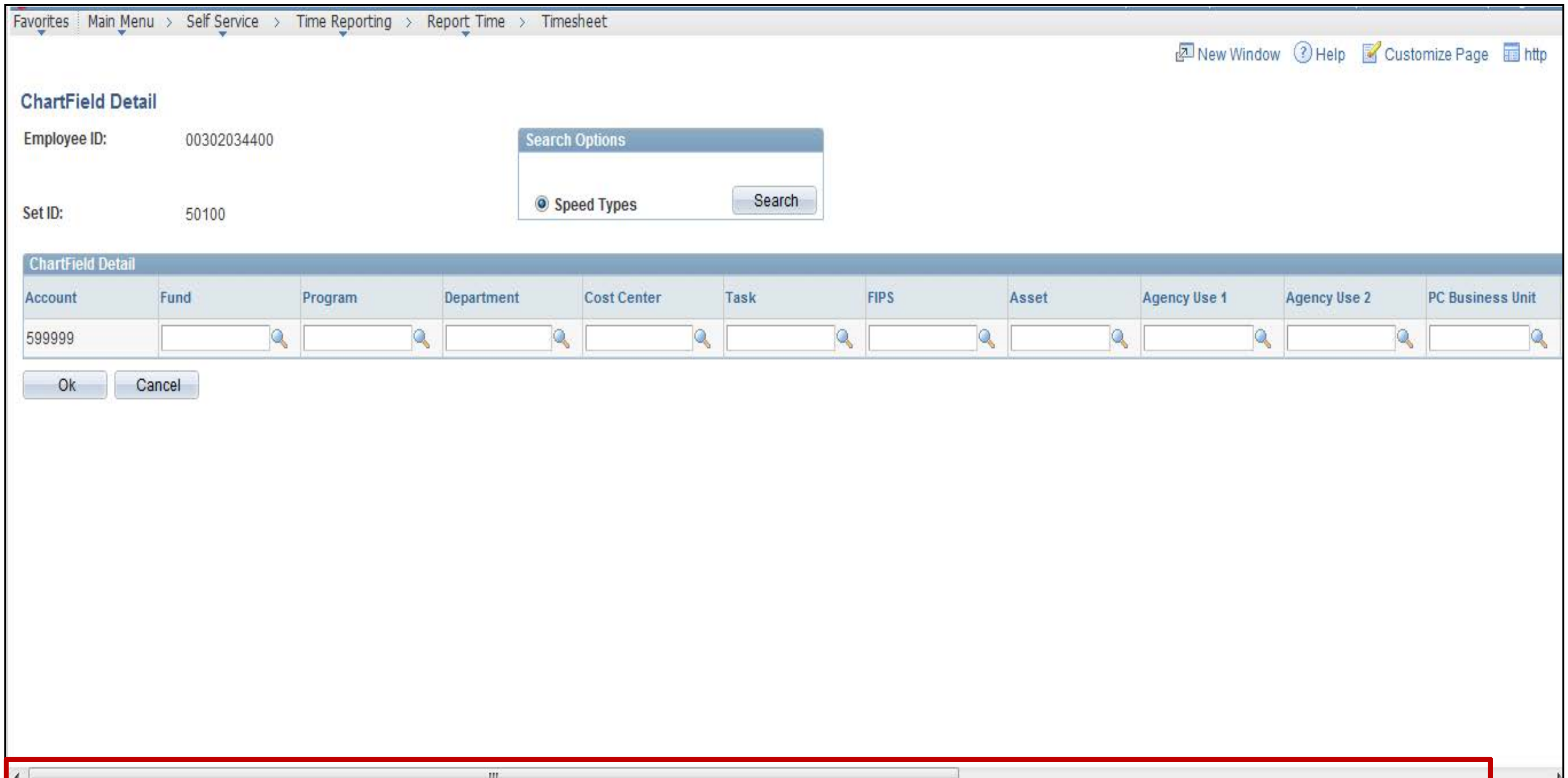
Plus and Minus Buttons

Allows a row to be added or deleted in the timesheet grid.



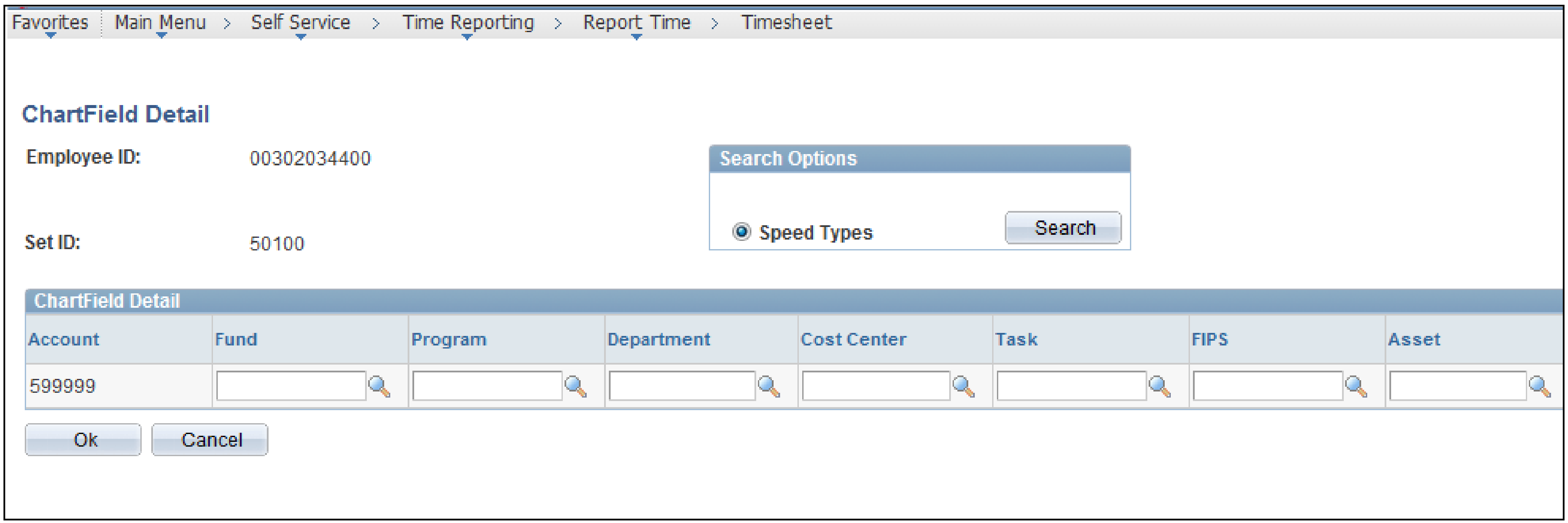
ChartField Detail Page

The **ChartField Detail** page provides the charge distribution for time entered. Use the scroll bar at the bottom of the page to view more ChartFields to the right.



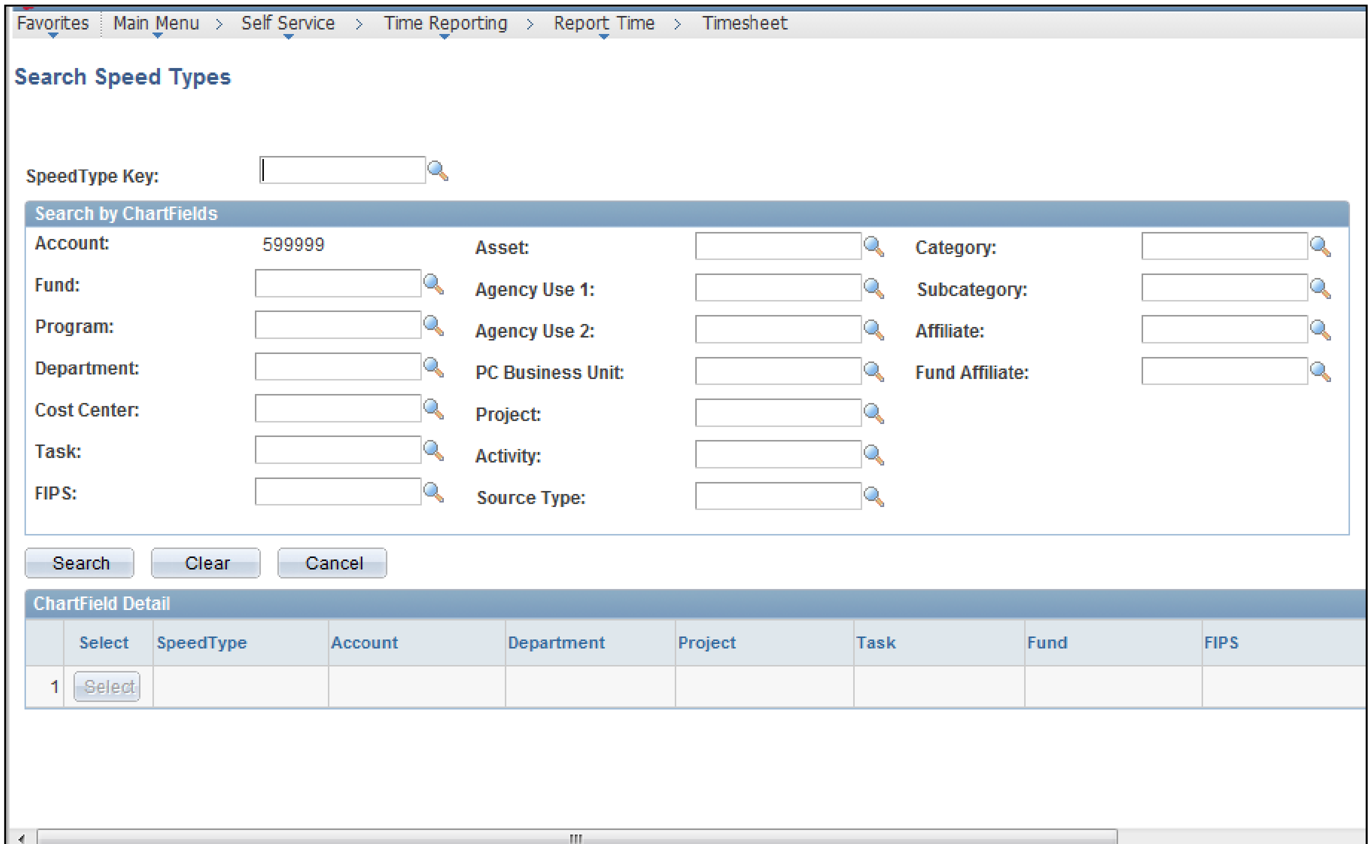
ChartField Detail Page (continued)

The **Search Option** defaults to **SpeedTypes**. Click the **Search** button to access the **SpeedTypes Search** page. Then select the appropriate **SpeedType** and supply any additional ChartField values needed.



Search SpeedTypes

Cardinal uses SpeedTypes to auto populate some of the ChartFields for you and identify additional ChartFields that require values. For example, when you select a project **SpeedType** value, Cardinal populates some ChartFields (**Fund**, **Program**, etc.), and requires you to enter an **Activity Code.**



Steps to Enter SpeedTypes

To select a SpeedType on the **Search SpeedTypes** page:

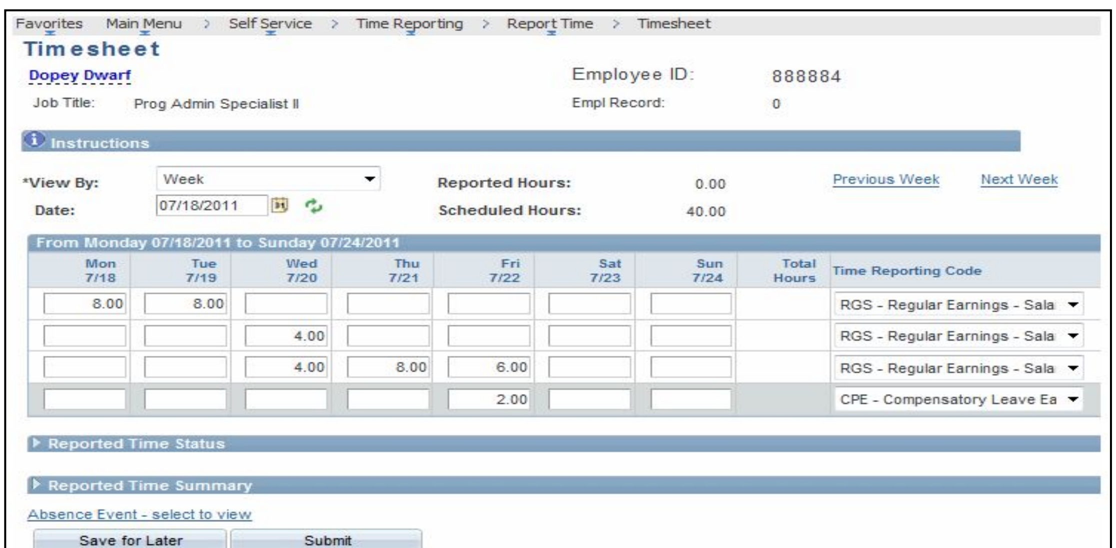
- Click the lookup icon (magnifying glass) next to the **SpeedType Key field** at the top of the page.
- Enter the Cost Center or Project number in the **SpeedType begins with** field.
- Click the **Lookup** button.
- Click the **SpeedType key** under the **Search Results** section. Cardinal returns you to the **Search SpeedTypes** page and populates the SpeedType values. You may need to enter additional values to make the charge distribution valid, however do not add any additional values on this page.
- Click the **Select** button and Cardinal returns you to the **ChartField Detail** page.
- Enter the appropriate values to complete the charge distribution. For example, for a project add the **Activity**.
- Click **OK.** Cardinal verifies the charge distribution and returns you to the timesheet if the distribution is valid. If not, Cardinal displays an error message so you can make the correction.
- If you are unsure of what code(s) to use, contact your Supervisor.

Charging Time to Multiple Distributions

The timesheet grid format allows you to charge multiple days for every unique TRC and charge distribution. This reduces duplicate entry. You charge time to different projects by selecting the appropriate **SpeedTypes** (ChartFields) for each individual time reporting line.

For example, this timesheet depicts your entry if you worked:

- Eight RGS hours Monday and Tuesday on Project A
- Four RGS hours on Wednesday on Project B
- Four RGS hours on Wednesday and eight RGS hours on Thursday and Friday on Project C
- Two CPE hours on Friday on Project C


Favorites Main Menu > Self Service > Time Reporting > Report Time > Timesheet

Timesheet

Dopey Dwarf   Employee ID: 888884

Job Title: Prog Admin Specialist II   Empl Record: 0

Instructions

*View By: Week   Reported Hours: 0.00   Previous Week   Next Week

Date: 07/18/2011   Scheduled Hours: 40.00

From Monday 07/18/2011 to Sunday 07/24/2011

Mon 7/18	Tue 7/19	Wed 7/20	Thu 7/21	Fri 7/22	Sat 7/23	Sun 7/24	Total Hours	Time Reporting Code
8.00	8.00							RGS - Regular Earnings - Sala
		4.00						RGS - Regular Earnings - Sala
		4.00	8.00	6.00				RGS - Regular Earnings - Sala
				2.00				CPE - Compensatory Leave Ea

Reported Time Status

Reported Time Summary

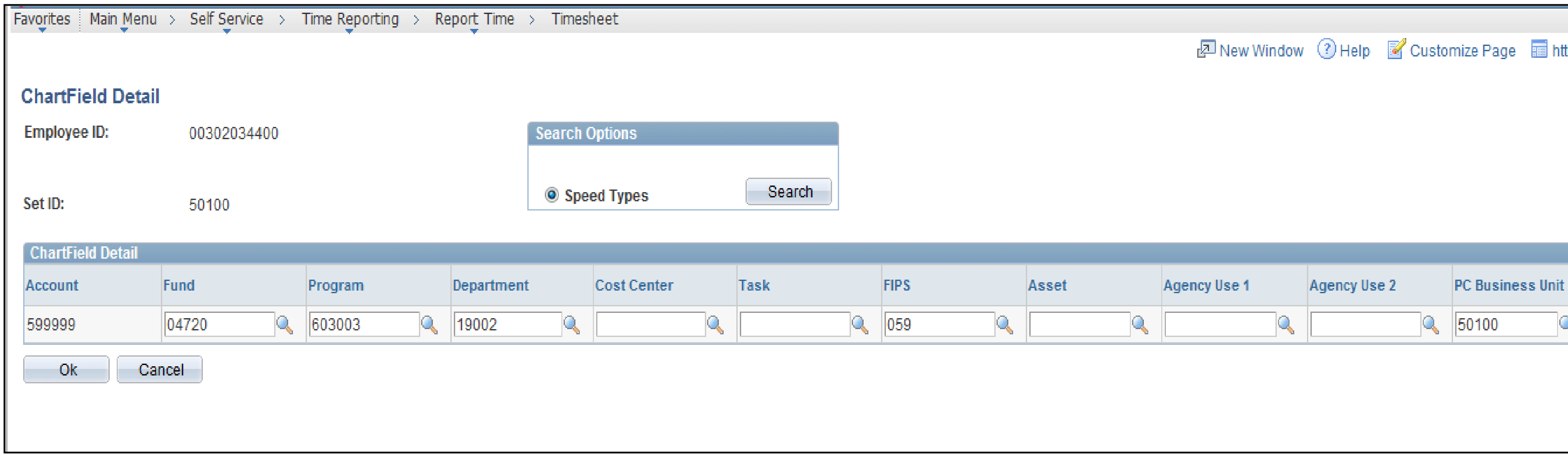
Absence Event - select to view

Save for Later   Submit

Click the image to enlarge

Charging Time to Multiple Distributions (continued)

Each row of time on the timesheet is charged to a charge code distribution (see example in the screenshot below).

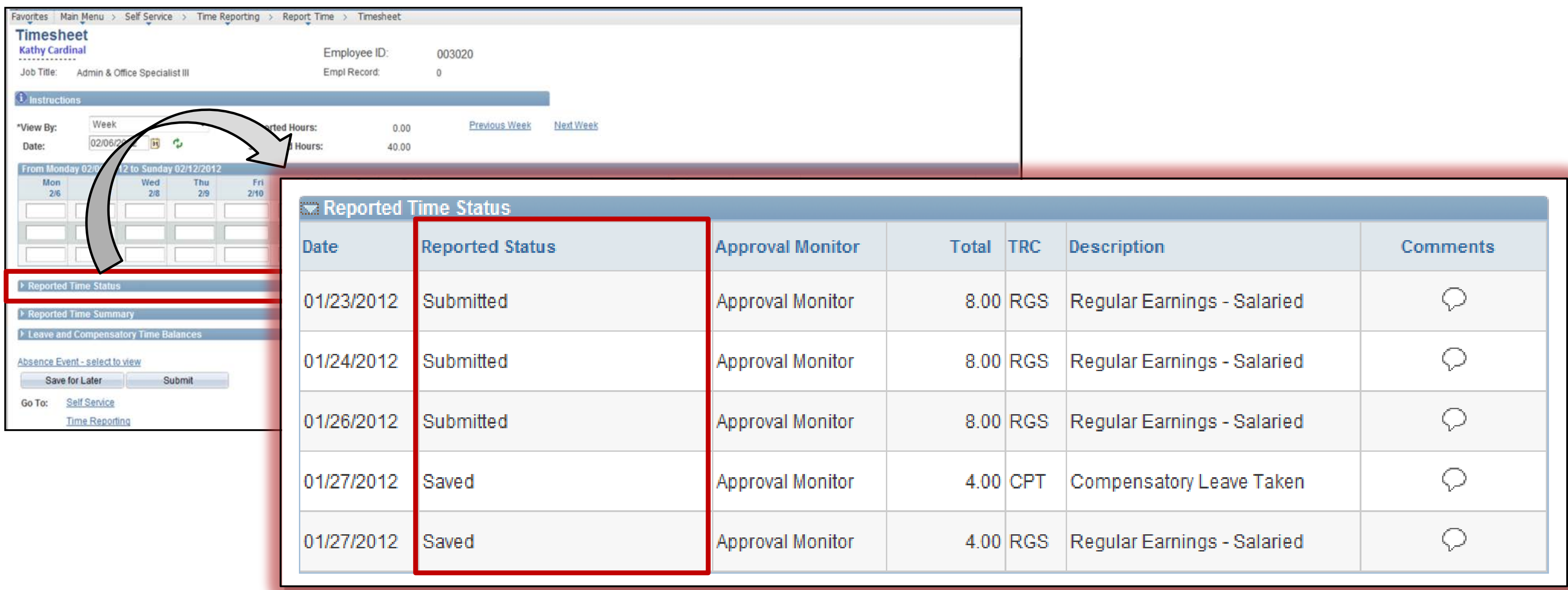


Refer to the **Time Entry Scenarios** job aid for details about the charge distribution codes in Cardinal.

Viewing the Status of Your Time

Cardinal allows you to save your time for later or submit it. You can determine if your time has been **Saved** or **Submitted** on the **Timesheet** page. Click to expand the **Reported Time Status** section on the timesheet.

When you have saved your time but not submitted it, the **Reported Status** field value is **Saved**. When your time has been submitted, the Reported Status field value is **Submitted**.



Date	Reported Status	Approval Monitor	Total	TRC	Description	Comments
01/23/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/24/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/26/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/27/2012	Saved	Approval Monitor	4.00	CPT	Compensatory Leave Taken	
01/27/2012	Saved	Approval Monitor	4.00	RGS	Regular Earnings - Salaried	

Viewing the Status of Your Time (continued)

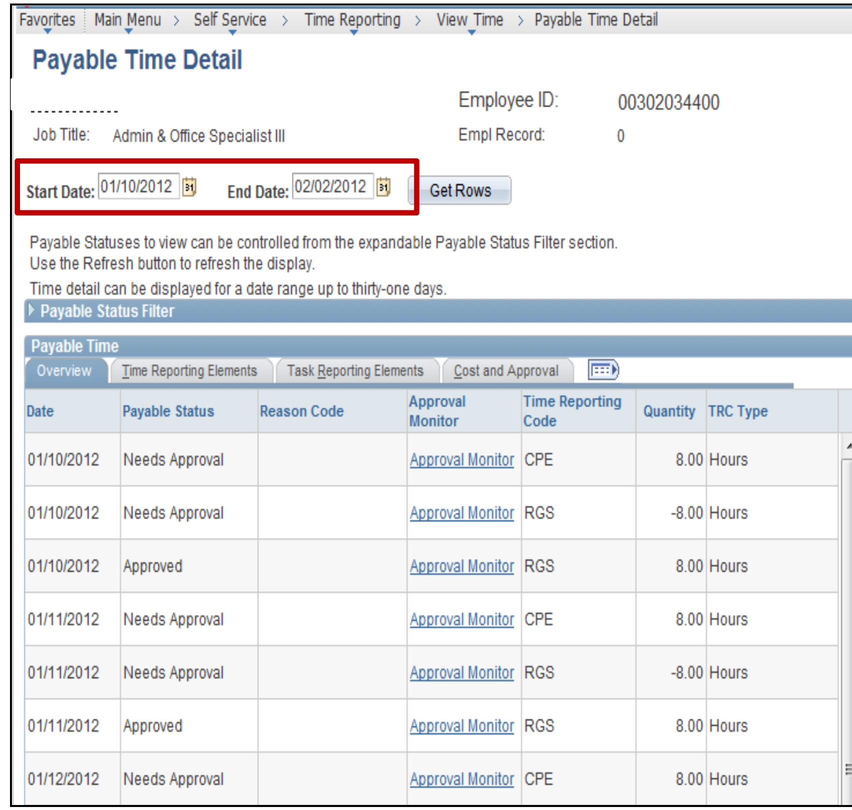
Once time is submitted and goes through the Time Administration process, it routes to your supervisor for approval.

The status on the **Timesheet** page only reflects whether the time has been **Saved** or **Submitted**.

To view the approval status, access the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail

You can enter a date range that allows you to view up to 30 days.



Date	Payable Status	Reason Code	Approval Monitor	Time Reporting Code	Quantity	TRC Type
01/10/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours
01/10/2012	Needs Approval		Approval Monitor	RGS	-8.00	Hours
01/10/2012	Approved		Approval Monitor	RGS	8.00	Hours
01/11/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours
01/11/2012	Needs Approval		Approval Monitor	RGS	-8.00	Hours
01/11/2012	Approved		Approval Monitor	RGS	8.00	Hours
01/12/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours

Viewing the Status of Your Time (continued)

The **Payable Status** field displays one of two values related to approval:

- **Needs Approval** - waiting for supervisor approval
- **Approved** - approved by the supervisor

It can also display three statuses applicable to the allocation process:

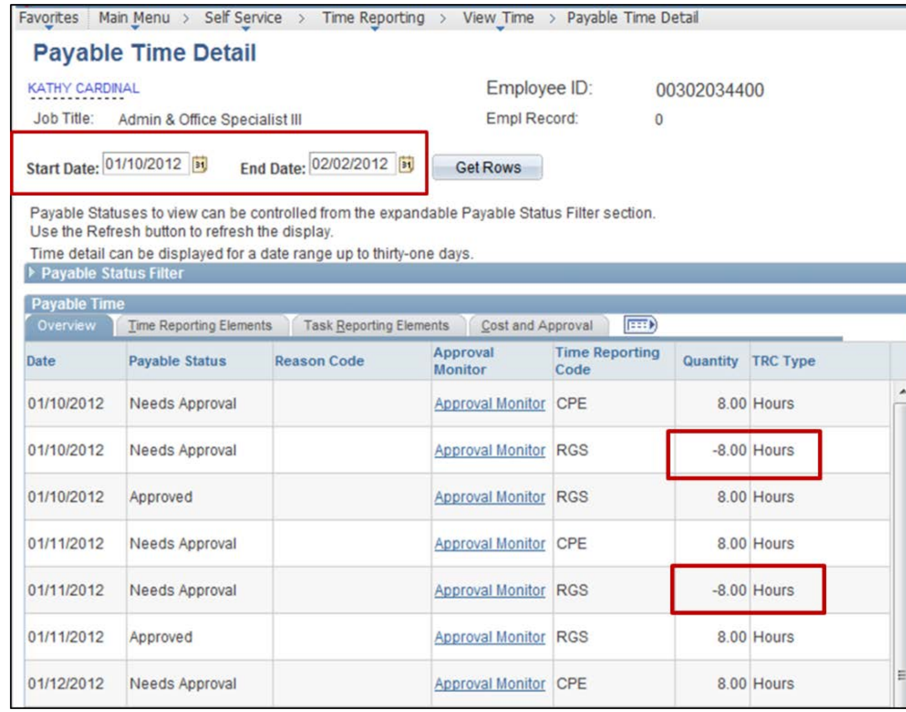
- **Taken by Payroll**
- **Rejected by Payroll**
- **Distributed**

Viewing the Status of Your Time (continued)

Sometimes, there are negative hours displayed on the **Payable Time Detail** page.

Cardinal does not allow users to enter negative hours.

Negative hours are generated when an adjustment occurs after time has been submitted and approved. Cardinal creates those negative hours to offset the original entry that is being adjusted.



Favorites | Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail

Payable Time Detail

KATHY CARDINAL

Employee ID: 00302034400

Job Title: Admin & Office Specialist III

Empl Record: 0

Start Date: 01/10/2012 End Date: 02/02/2012 Get Rows

Payable Statuses to view can be controlled from the expandable Payable Status Filter section.
Use the Refresh button to refresh the display.
Time detail can be displayed for a date range up to thirty-one days.

Payable Status Filter

Payable Time

Overview | Time Reporting Elements | Task Reporting Elements | Cost and Approval

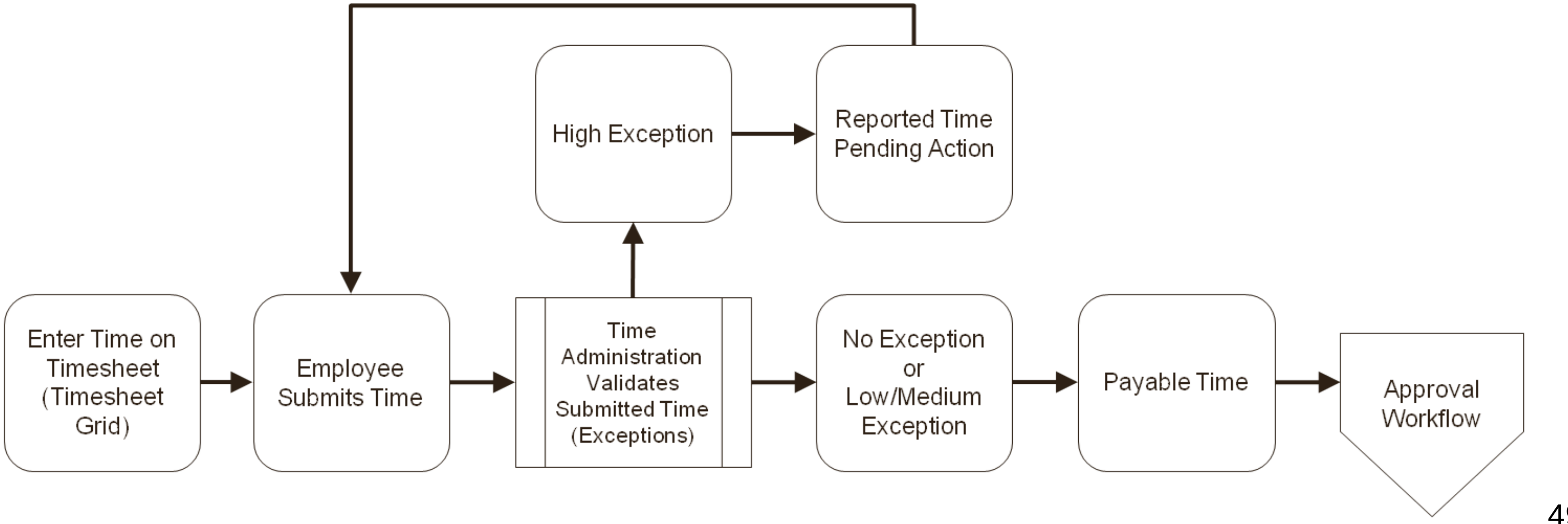
Date	Payable Status	Reason Code	Approval Monitor	Time Reporting Code	Quantity	TRC Type
01/10/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours
01/10/2012	Needs Approval		Approval Monitor	RGS	-8.00	Hours
01/10/2012	Approved		Approval Monitor	RGS	8.00	Hours
01/11/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours
01/11/2012	Needs Approval		Approval Monitor	RGS	-8.00	Hours
01/11/2012	Approved		Approval Monitor	RGS	8.00	Hours
01/12/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours

Administer Time & Attendance Validation and Approval

In order to be processed by Time Administration, reported time must be submitted. You should enter and submit time at the end of the week and end of the pay period. Once you have submitted your time for processing, Time Administration validates it against time reporting rules and generates payable time. It may also generate an exception (low, medium or high).

If submitted time contains no high exceptions, it becomes payable time. Medium and low exceptions should be reviewed and corrected or but are allowed. Exceptions are covered later in this course.

If submitted time contains high exceptions, the time must be corrected and resubmitted to Time Administration for reprocessing.

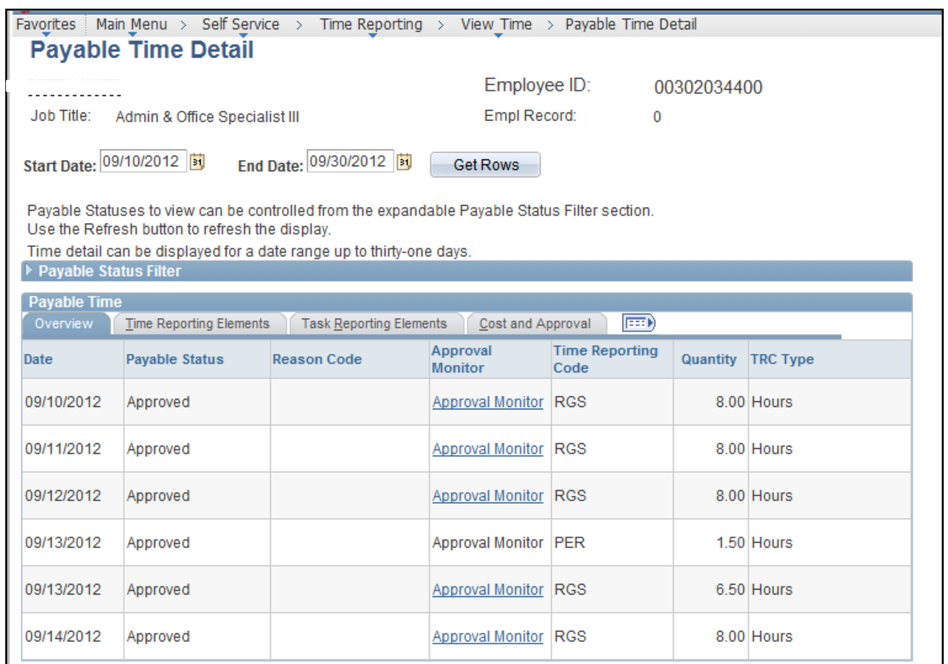


Administer Time & Attendance Validation and Approval (continued)

A Time Approver may approve or deny payable time. Once the approver takes action, you can check the status of your time by accessing the **View Payable Time Detail** page. If the time is denied, discuss the reason with your supervisor, make the adjustment and resubmit your time for processing and approval.

You can access this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > View Time >Payable Time Detail



Favorites | Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail

Payable Time Detail

Employee ID: 00302034400

Job Title: Admin & Office Specialist III

Empl Record: 0

Start Date: 09/10/2012 End Date: 09/30/2012 Get Rows

Payable Statuses to view can be controlled from the expandable Payable Status Filter section.
Use the Refresh button to refresh the display.
Time detail can be displayed for a date range up to thirty-one days.

Payable Status Filter

Payable Time

Overview | Time Reporting Elements | Task Reporting Elements | Cost and Approval

Date	Payable Status	Reason Code	Approval Monitor	Time Reporting Code	Quantity	TRC Type
09/10/2012	Approved		Approval Monitor	RGS	8.00	Hours
09/11/2012	Approved		Approval Monitor	RGS	8.00	Hours
09/12/2012	Approved		Approval Monitor	RGS	8.00	Hours
09/13/2012	Approved		Approval Monitor	PER	1.50	Hours
09/13/2012	Approved		Approval Monitor	RGS	6.50	Hours
09/14/2012	Approved		Approval Monitor	RGS	8.00	Hours

Administer Time & Attendance Validation and Approval (continued)

Completing and submitting your timesheet allows for:

- Time Administration processing
- Correction of exceptions as needed
- Resubmission through Time Administration as needed
- Final approval for payable time to take place

The Agency provides schedules of due dates for timesheet submission and approval annually.

Timesheet Lockout

Timesheets are placed on a temporary lockout at the end of a pay period on the day timesheets are due, per the Salary / Hourly Calendars. This prevents any changes to the period during the allocation process that distributes payroll costs to various projects, cost centers, etc. Once lockout is lifted, you can make adjustments to that time period if necessary.

Lockout is fiscal year to date through the specified pay period end date for both salaried or hourly timesheets.

During Lockout for a specific salaried pay period:

- No salaried timesheet entry / approval can occur for that pay period
- No salaried timesheet entry / approval can occur for prior period adjustments before that pay period
- Salaried timesheet entry / approval is allowed for pay periods subsequent (future) to the specific period under lockout

Simulation: Entering and Submitting Time

This simulation shows you how to enter and submit time. Click the Cardinal logo below to start the simulation.

Learning Game Placeholder

Learning Game: Word Quiz

Title: TA Terms Timer

Viewing and Entering Compensatory and Overtime Leave

Compensatory and overtime leave earned and taken are recorded on the timesheet. If you are eligible, you can select Time Reporting Codes for compensatory leave and overtime leave and enter them directly on the timesheet:

- **CPE** – Compensatory Leave Earned
- **ECP** – Emergency Compensatory Leave Earned
- **CPT** – Compensatory Leave Taken
- **OTL** – Overtime Leave Earned
- **EOL** – Emergency Overtime Leave Earned
- **OTT** – Overtime Leave Taken

When you earn compensatory leave or overtime leave, enter the time on the timesheet and select the charge distribution associated with your work.

When you take compensatory or overtime leave, enter the hours and the **TRC**, and click the **ChartFields** link. Cardinal auto populates the charge distribution.

When you enter compensatory and overtime leave, they are processed by Time Administration and then route to the supervisor for approval. Once the supervisor approves the time, it is available for use.

Viewing and Entering Compensatory and Overtime Leave (continued)

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Timesheet

New Window | Help | http

Timesheet

Kathy Cardinal

Employee ID: 0030203

Job Title: Admin & Office Specialist III

Empl Record: 0

Instructions

*View By: Week

Date: 02/06/2012

Reported Hours: 0.00

Scheduled Hours: 40.00

Previous Week | Next Week

From Monday 02/06/2012 to Sunday 02/12/2012

Mon 2/6	Tue 2/7	Wed 2/8	Thu 2/9	Fri 2/10	Sat 2/11	Sun 2/12	Total Hours	Time Reporting Code	Taskgroup	Business Unit	Telec
6.00								RGS - Regular Earnings - S	VDOTCOMRI	50100	
2.00								CPE - Compensatory Leave	VDOTCOMRI	50100	

Reported Time Status

Reported Time Summary

Leave and Compensatory Time Balances

Plan Type	Plan	Recorded Balance	Minimum Allowed	Maximum Allowed
Comp Time	COMP_LEAVE	24.00	0	120

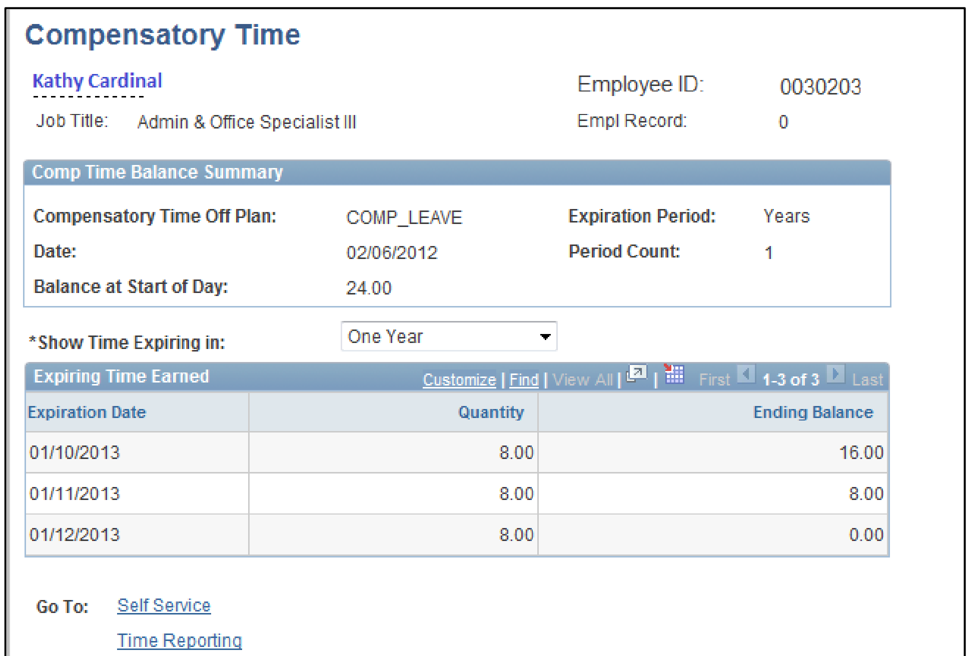
Absence Event - select to view

Save for Later | Submit

Viewing and Entering Compensatory and Overtime Leave (continued)

You can view a summary of your compensatory and overtime leave balances in the **Leave and Compensatory Time Balances** section of the **Timesheet** page. The **Compensatory Time** page provides more detail about your compensatory and overtime leave, including the balance as of the current date and the ability to select options to **Show time Expiring in**: 30 days, 60 days, 90 days and 1 year.

Click on the link for each leave type in the **Plan** field to open the **Compensatory Time** page.



Compensatory Time

Kathy Cardinal

Employee ID: 0030203

Job Title: Admin & Office Specialist III

Empl Record: 0

Comp Time Balance Summary

Compensatory Time Off Plan: COMP_LEAVE

Expiration Period: Years

Date: 02/06/2012

Period Count: 1

Balance at Start of Day: 24.00

*Show Time Expiring in: One Year

Expiring Time Earned

Customize | Find | View All | First 1-3 of 3 Last

Expiration Date	Quantity	Ending Balance
01/10/2013	8.00	16.00
01/11/2013	8.00	8.00
01/12/2013	8.00	0.00

Go To: Self Service

Time Reporting

Click the image to enlarge

Simulation: Viewing and Entering Compensatory and Overtime Leave

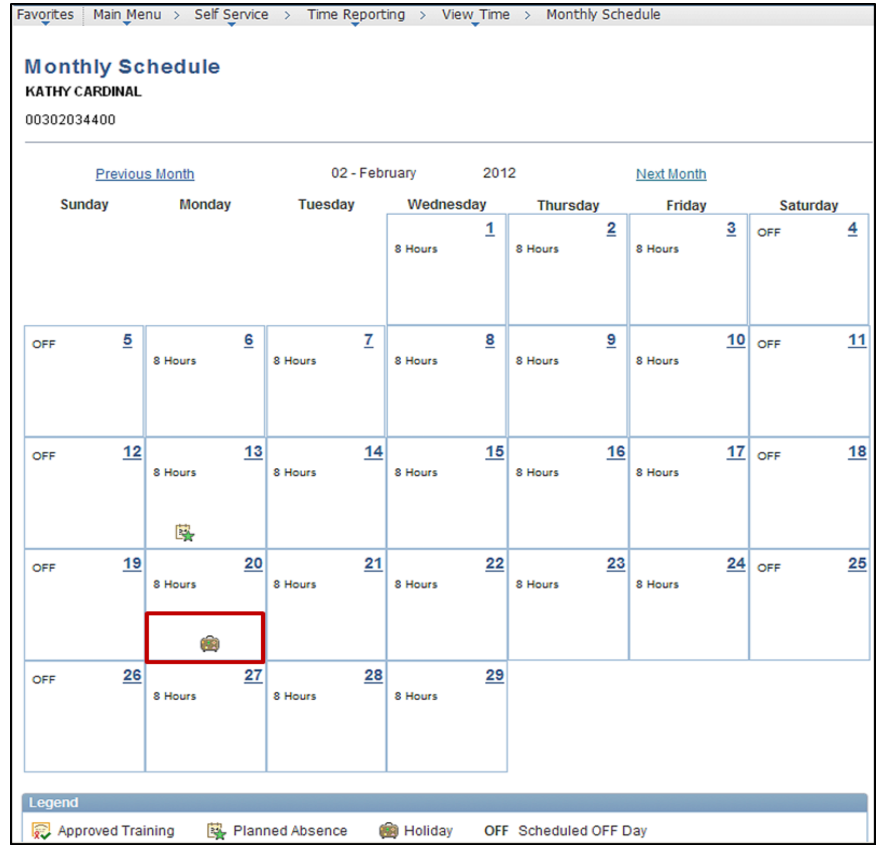
This simulation shows you how to view and enter compensatory and overtime leave. Click the Cardinal logo below to start the simulation.

Viewing Holidays and Entering Floating Holidays

Holidays are noted on the **Monthly Schedule** page in Time & Attendance with the image of a suitcase. However, **scheduled holidays are not visible on the timesheet**.

Navigate to the **Monthly Schedule** page using the following path:

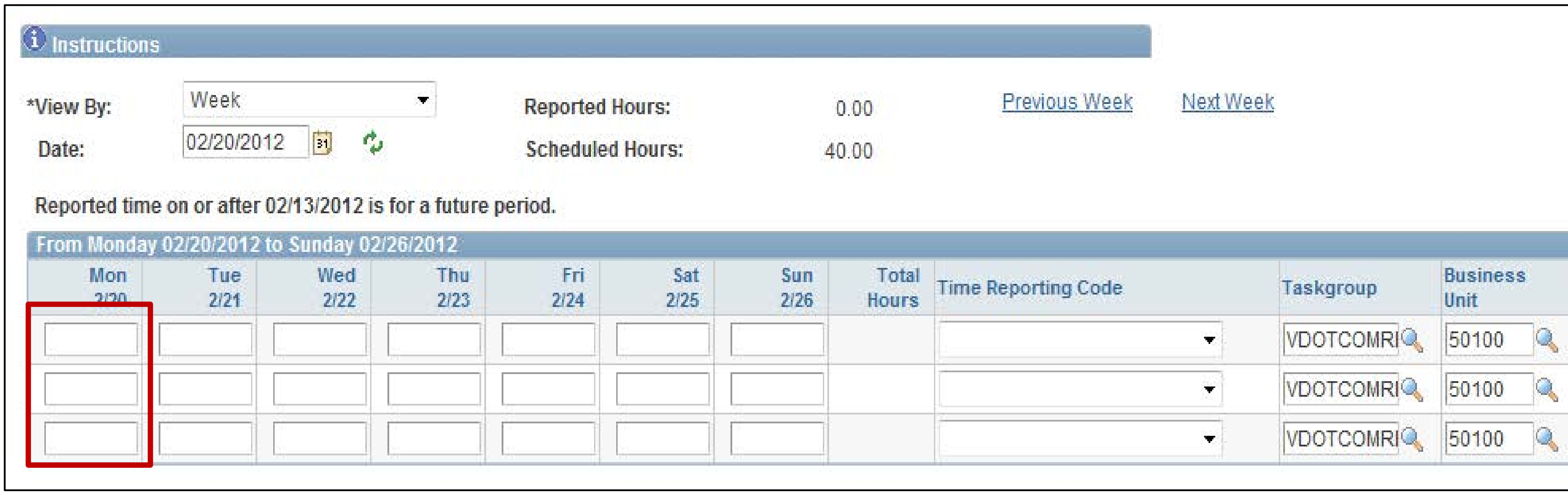
Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > View Time > Monthly Schedule



Click the image to enlarge

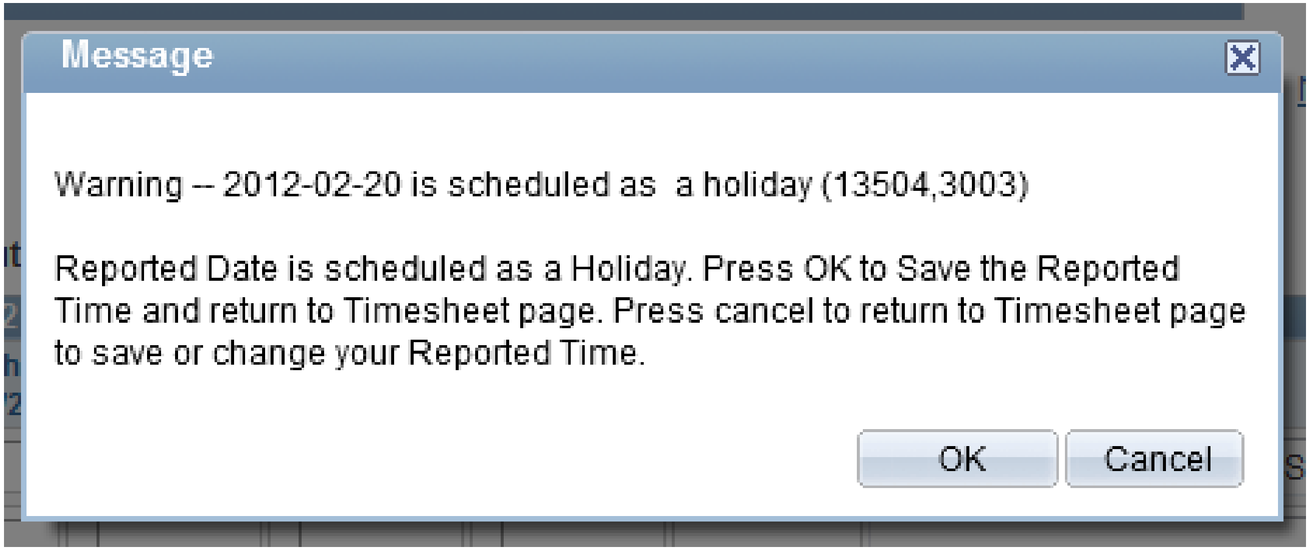
Holidays

Holidays do not display on the timesheet, however Time Administration recognizes the holiday and gives each employee holiday hours. You do not need to enter a **TRC** nor any time on a holiday in Cardinal unless you work on a holiday.



Working on a Holiday

If you work on a holiday and need to record regular hours, enter the time on the holiday. The holiday warning message displays when you either **Save for Later** or **Submit** time. Click the **OK** button.



Using a Floating Holiday

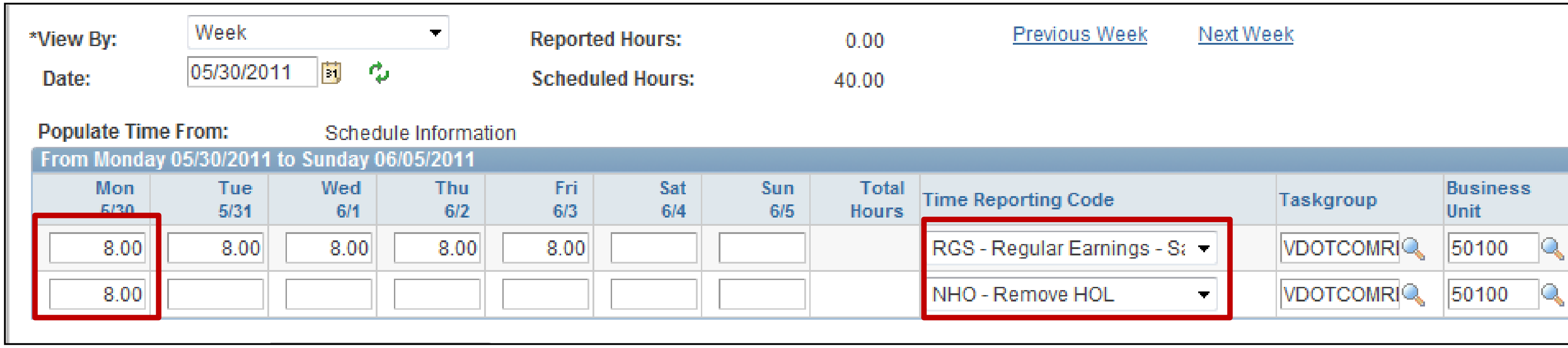
If you are an eligible employee who has a floating holiday instead of the standard holiday:

- Row 1: Enter hours worked
- Row 2: Enter regular scheduled hours and use the **NHO** Time Reporting Code. After entering the **TRC**, click the **ChartFields** link and the charge distribution auto populates. Click **Ok** to return to the **Timeshee**t page.

The Time Reporting Code of **HFL** is entered for the day you take the floating holiday. After entering the **TRC**, click the **ChartFields** link for the charge distribution to auto populate. Then click the **OK** button to return to the **Timesheet** page.

Note: Floating holidays must be taken during the pay period in which the holiday occurs.

Using a Floating Holiday (continued)



*View By: Week

Date: 05/30/2011

Reported Hours: 0.00

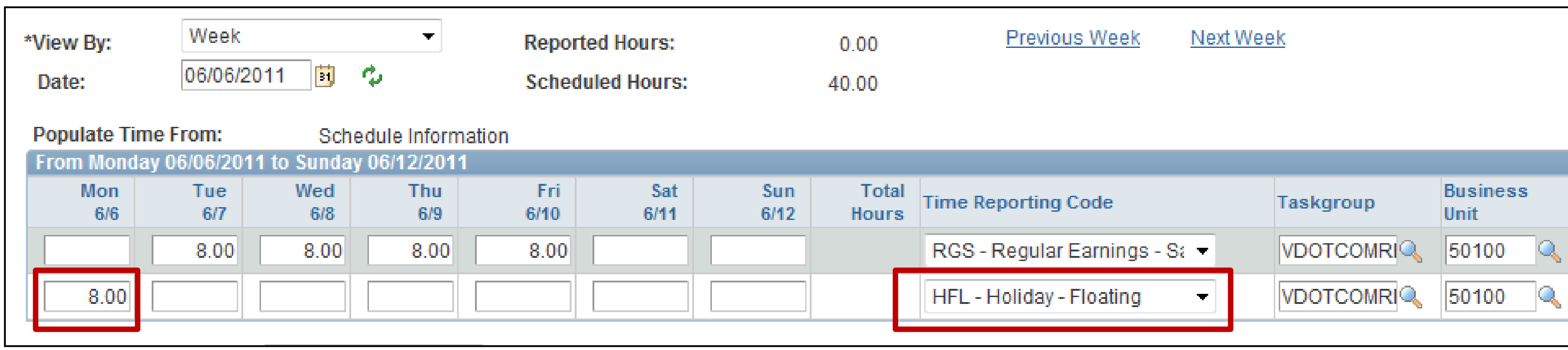
Scheduled Hours: 40.00

Previous Week Next Week

Populate Time From: Schedule Information

From Monday 05/30/2011 to Sunday 06/05/2011

Mon 5/30	Tue 5/31	Wed 6/1	Thu 6/2	Fri 6/3	Sat 6/4	Sun 6/5	Total Hours	Time Reporting Code	Taskgroup	Business Unit
8.00	8.00	8.00	8.00	8.00				RGS - Regular Earnings - Sa	VDOTCOMRI	50100
8.00								NHO - Remove HOL	VDOTCOMRI	50100



*View By: Week

Date: 06/06/2011

Reported Hours: 0.00

Scheduled Hours: 40.00

Previous Week Next Week

Populate Time From: Schedule Information

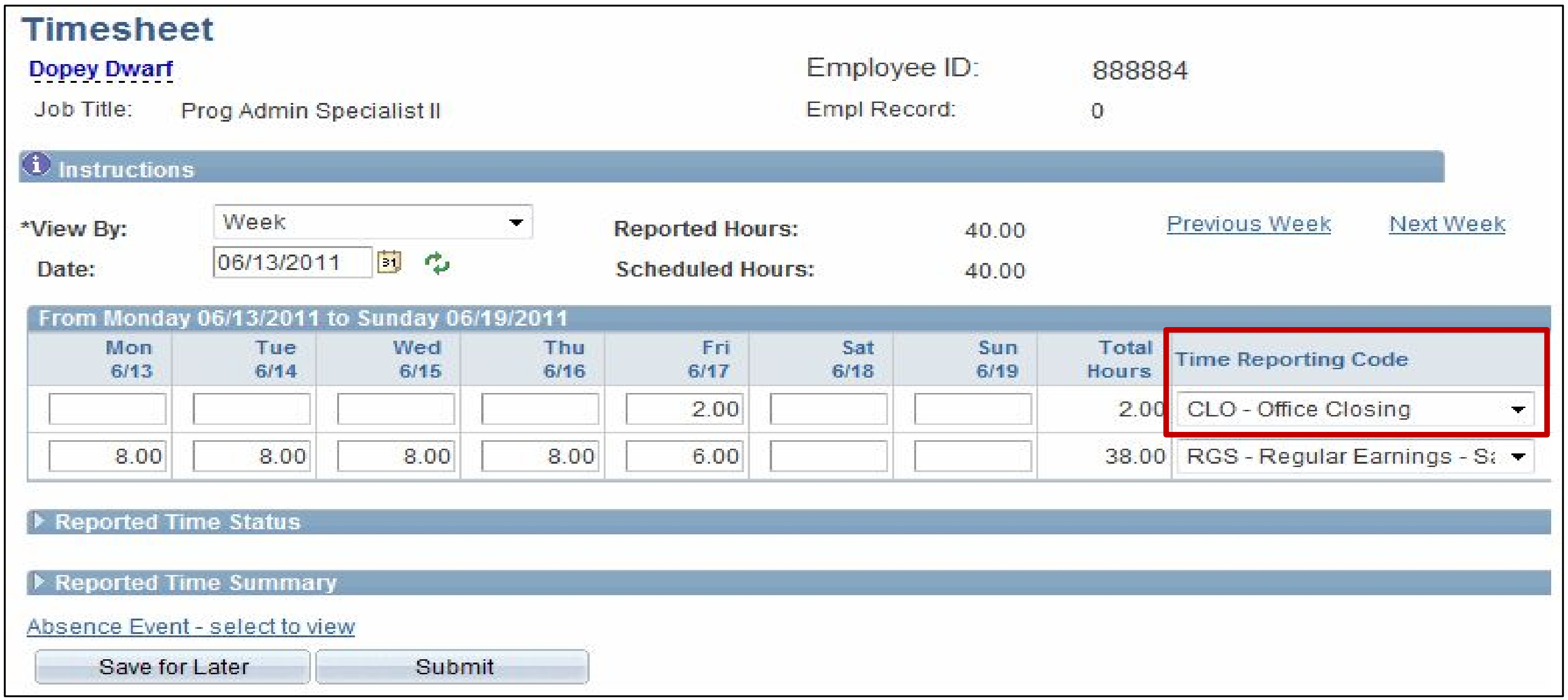
From Monday 06/06/2011 to Sunday 06/12/2011

Mon 6/6	Tue 6/7	Wed 6/8	Thu 6/9	Fri 6/10	Sat 6/11	Sun 6/12	Total Hours	Time Reporting Code	Taskgroup	Business Unit
	8.00	8.00	8.00	8.00				RGS - Regular Earnings - Sa	VDOTCOMRI	50100
8.00								HFL - Holiday - Floating	VDOTCOMRI	50100

Note: Not every employee is permitted to take floating holidays. Confirm with your supervisor that you are eligible before entering a floating holiday on your timesheet.

Entering Office Closing

Use **CLO** as the Time Reporting Code for office closings. The **CLO** Time Reporting Code auto populates the charge distribution after you click the **ChartField** link. Then click the **Ok** button to return to the **Timesheet** page.



Timesheet

Dopey Dwarf

Job Title: Prog Admin Specialist II

Employee ID: 888884

Empl Record: 0

Instructions

*View By: Week

Date: 06/13/2011

Reported Hours: 40.00

Scheduled Hours: 40.00

Previous Week Next Week

From Monday 06/13/2011 to Sunday 06/19/2011

Mon 6/13	Tue 6/14	Wed 6/15	Thu 6/16	Fri 6/17	Sat 6/18	Sun 6/19	Total Hours	Time Reporting Code
				2.00			2.00	CLO - Office Closing
8.00	8.00	8.00	8.00	6.00			38.00	RGS - Regular Earnings - S:

Reported Time Status

Reported Time Summary

Absence Event - select to view

Save for Later Submit

Lesson 4: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer and click **Submit** to see if you chose the correct response.

The weekly time entry format allows you to enter multiple days for each unique combination of Time Reporting Code (TRC) and charge distribution, which reduces duplicate entry.

- ○ True
- ○ False

Lesson 4: Summary

In this lesson, you learned:

- Self Service users enter hours, choose a **Time Reporting Code** and enter a charge distribution by day.
- To enter a charge distribution, search for and select the appropriate **SpeedType** and then enter any additional **ChartField** values as needed.
- Review your time the day after you submit it, and check for any exceptions.
- Compensatory leave and overtime leave balances can be viewed on the **Timesheet** page.

Lesson 5: Viewing Absence Entitlement Balances and Entering Absence Requests

In this lesson, you will learn about the following topics.

- Viewing Current and Future Absence Entitlement Balances
- Entering Absence Requests

Viewing Current Absence Entitlement Balances

In addition to being able to enter your time on the timesheet, you can also view your absence entitlement balances and enter an absence request from the **Timesheet** page.

Click on the **Absence Event – select to view** link on the **Timesheet** page to expand the **Absence Events** section and display:

1. **Absence Takes** section
2. **Add Absence Event** button
3. **Absence Entitlement Balances** section

Viewing Current Absence Entitlement Balances (continued)

Absence Event - select to hide

Absence Events

Absence Take

*Start Date	End Date	Absence Name	Reason	Unit Type	Details	Status	Approval Monitor	Source	Cancel
					Details		Approval Monitor	Admin	☐

Add Absence Event

Absence Entitlement Balances Customize |

Current Balances

Entitlement Name	Balance as of 01/24/2012**	From	To	Accrual Period
Family Medical Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Sick Leave	72.00 Hours	01/10/2012	01/09/2013	Year to Date
Sick Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Pre-Layoff Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Public Health Emergency	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Personal Leave	31.50 Hours	01/10/2012	01/09/2013	Year to Date
Military Bank Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date

Absence Entitlement Balances Section

This section provides a view of your absence balances (excluding Compensatory and Overtime leave). It shows absence balances as of the most recently finalized and closed pay period. This balance does not reflect absence events entered or entitlements earned in the current pay period.

Absence Event - select to hide

Absence Events

Absence Take

*Start Date	End Date	Absence Name	Reason	Unit Type	Details	Status	Approval Monitor	Source	Cancel
					Details		Approval Monitor	Admin	☐

Add Absence Event

Absence Entitlement Balances Customize |

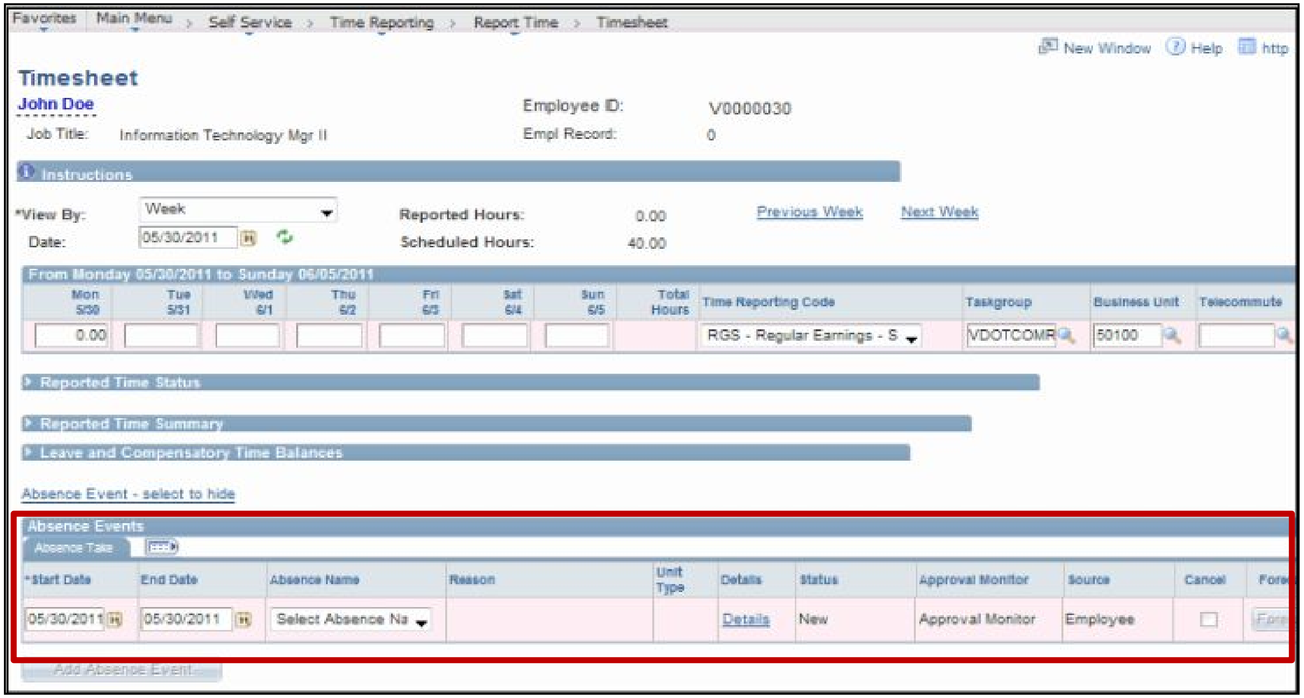
Current Balances

Entitlement Name	Balance as of 01/24/2012**	From	To	Accrual Period
Family Medical Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Sick Leave	72.00 Hours	01/10/2012	01/09/2013	Year to Date
Sick Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Pre-Layoff Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Public Health Emergency	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Personal Leave	31.50 Hours	01/10/2012	01/09/2013	Year to Date
Military Bank Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date

Entering Absence Requests

The **Absence Take** tab displays absence requests for the current week, including those that extend from prior weeks or into future weeks. To view absence requests that have been made for prior weeks or future weeks, you need to go to that week on the timesheet.

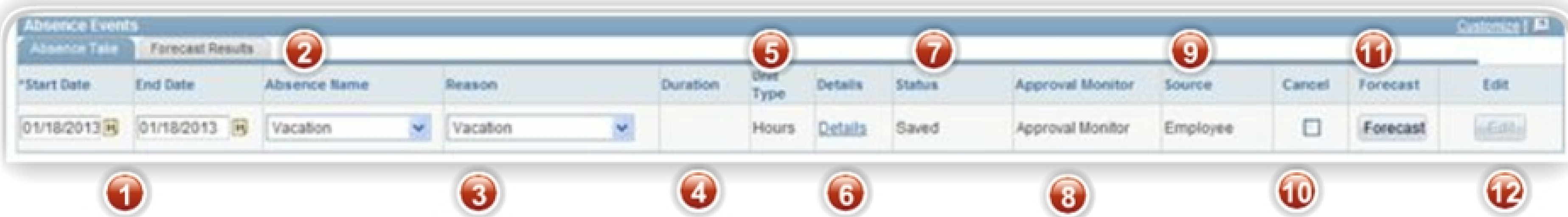
The **Absence Take** tab also allows you to enter new absence requests and edit existing absence requests. Review the fields for a new absence request.



Explanation of Absence Entry Fields

Absence Entry Grid

Click the markers for a description of each field.

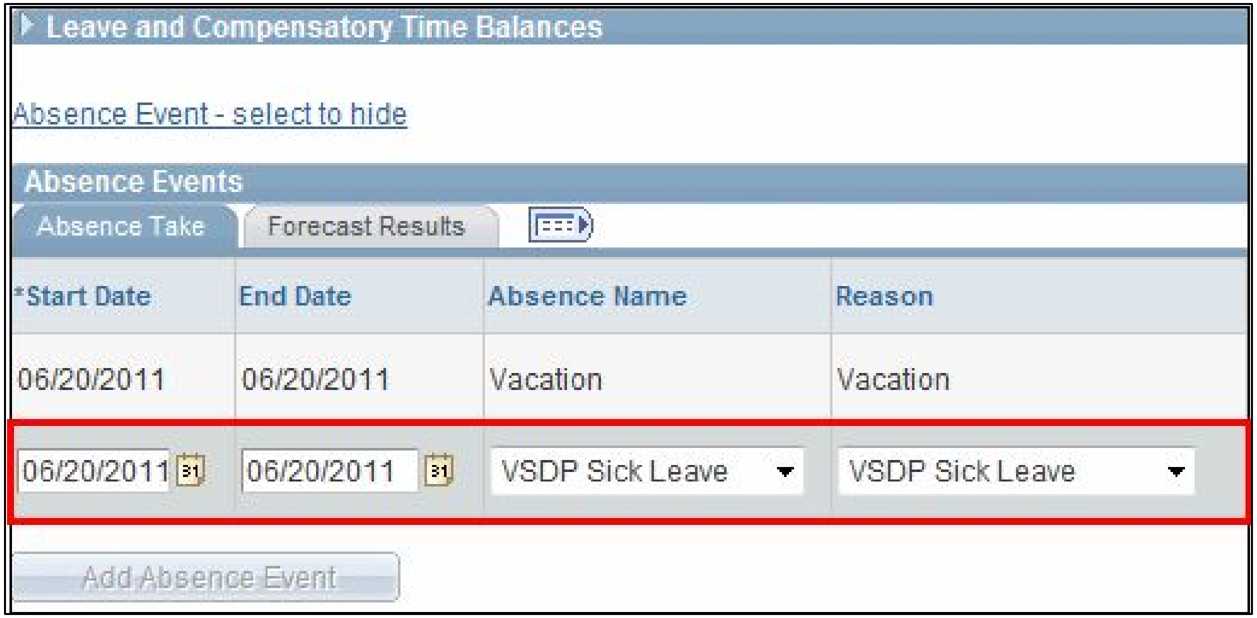


Absence Date(s), Name and Reason

Click on the **Add Absence Event** button to add a new row under the **Absence Take** tab.

Enter your absence request on the new row by completing the required fields:

- **Start Date**
- **End Date**
- **Absence Name**
- **Reason**



Absence Request the Crosses Pay Periods

When entering an absence request, be sure the time requested is within the same pay period. If the time crosses into another pay period you should enter it as two requests.

For example, to take vacation from 5/9 – 5/11 enter the request as follows:

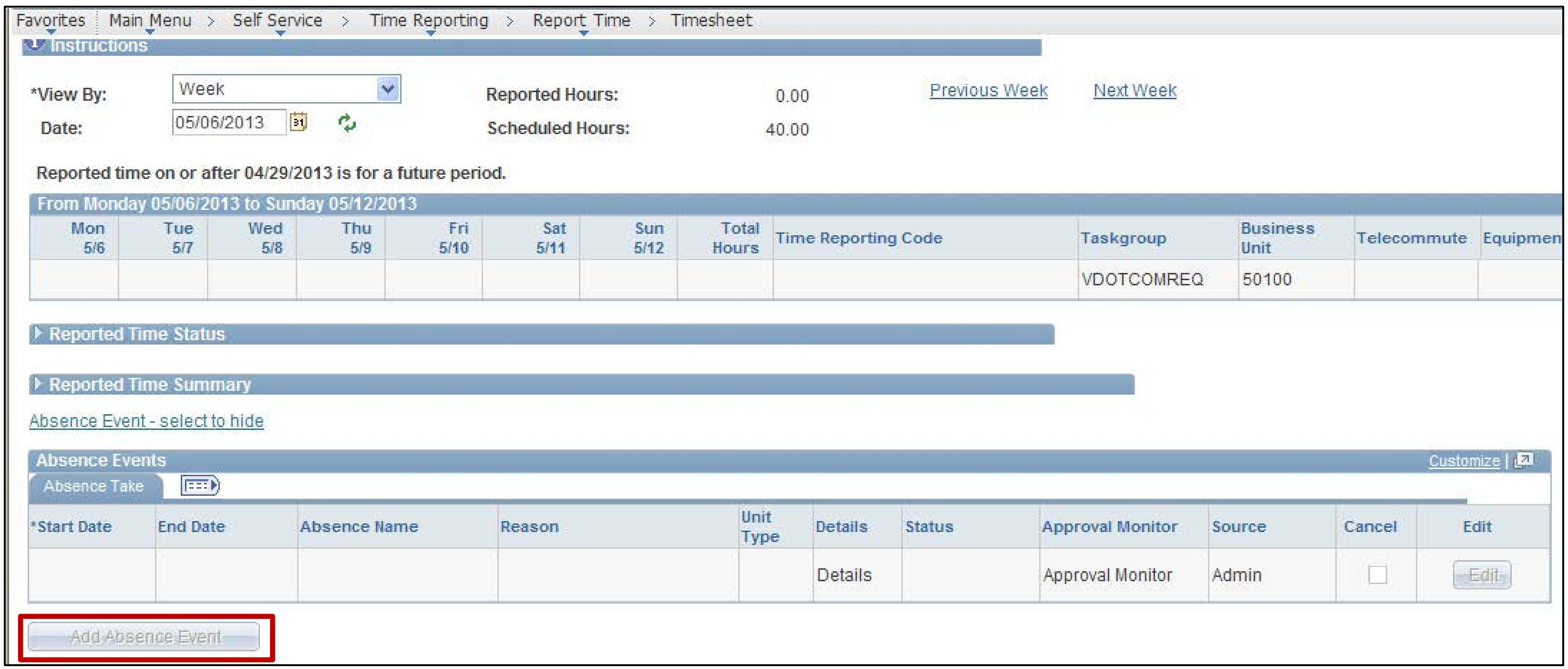
- Request #1: 5/9
  - Enter or select the week that contains the begin date of the first request
  - Enter the leave request by clicking the **Add Absence** button under the **Absence Event** section
  - Click the **Forecast** button
  - The *Forecast Successful* message displays
  - Click the **Submit** button

- Request #2: 5/10-5/11
  - Enter the week that contains the begin date of the second request
  - Enter the leave request by clicking the **Add Absence** button under the **Absence Event** section
  - Click the **Forecast** button
  - The *Forecast Successful* message displays
  - Click the **Submit** button

Future Absence Requests

Cardinal allows you to enter absences 90 days in the future. If 90 days from the current day falls in the middle of the week, Cardinal allows you to enter absence events for any day of that week. You can not enter anything for the following week.

If you try to enter a future absence request which exceeds the 90 days, Cardinal disables the **Add Absence Event** button which prevents absences from being entered outside the designated timeframe.



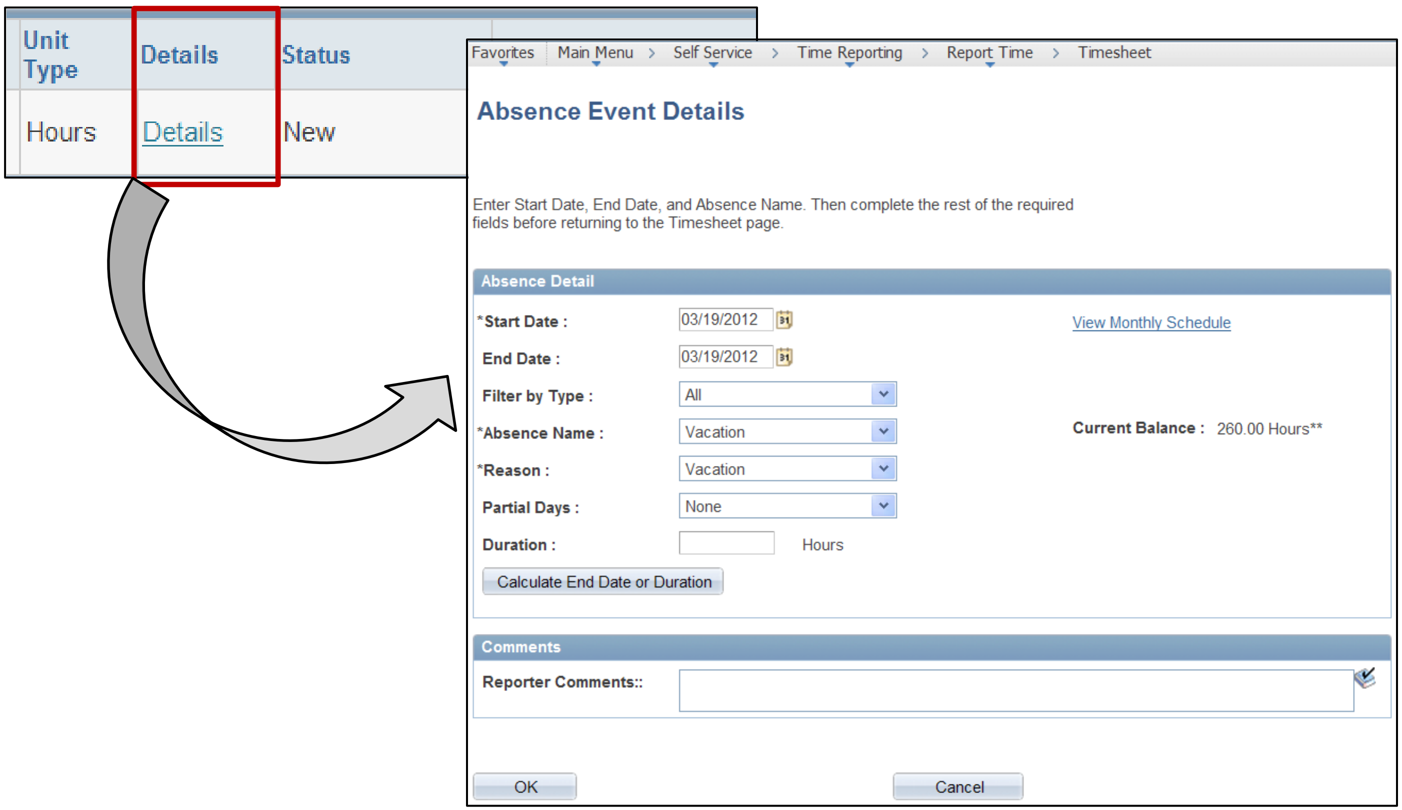
Details Link and Forecast Button

Once you enter values in the required fields, there are two additional steps to complete your request:

- **Details** link
- **Forecast** button

Details Link

Click the **Details** link. Cardinal auto populates any information already entered in the **Absence Event** section of the **Timesheet** page. On the **Absence Event** Detail page, enter any partial days. Cardinal uses both your schedule and the information entered in the **Absence Event Details** page to calculate the total hours (duration) of your absence.

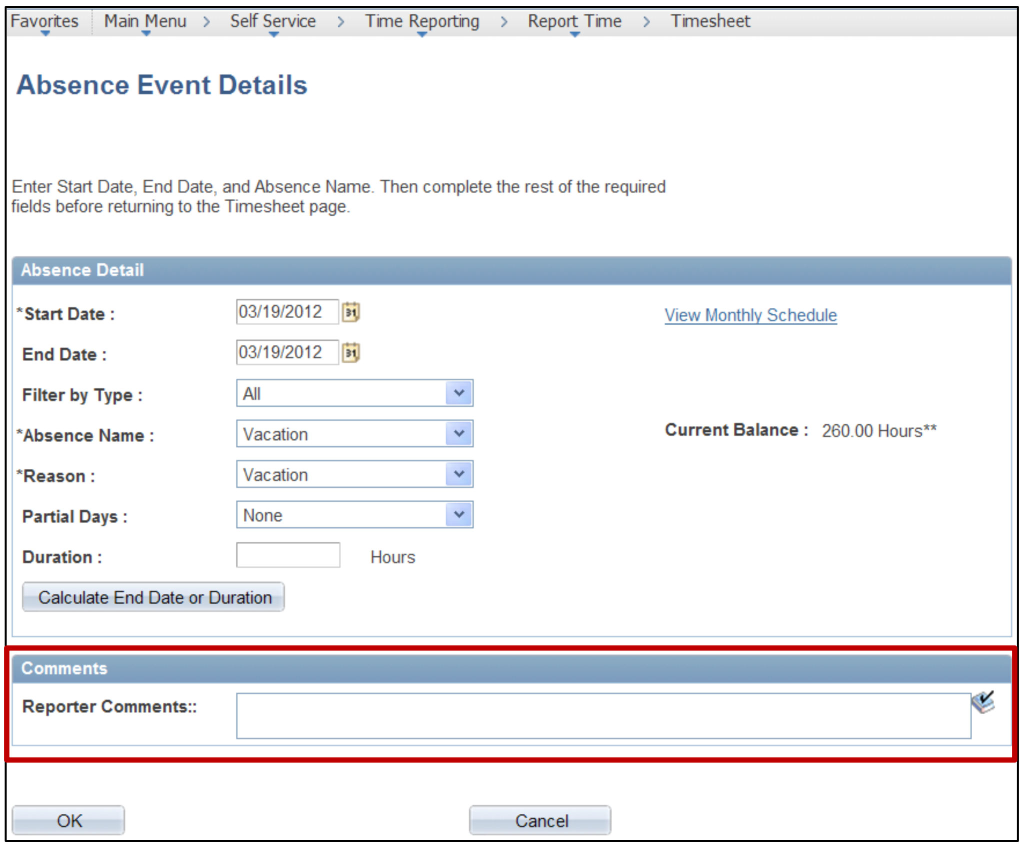


Click the image to enlarge

Reporter Comments

The **Reporter Comments** field allows you to enter comments if you choose, regarding the absence.

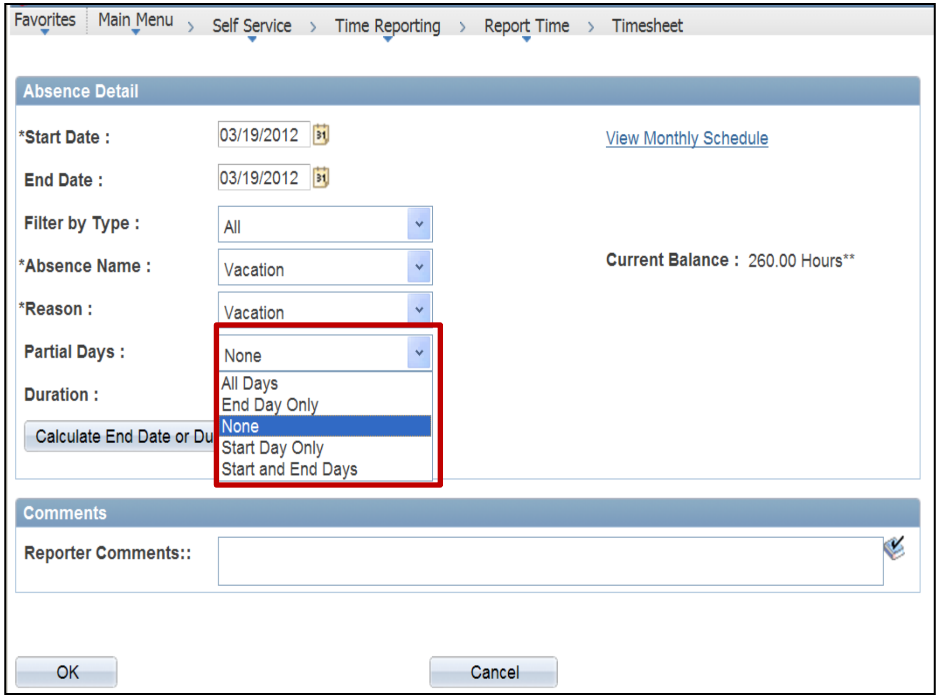
Important Note: If you enter comments in this field, they can be viewed by anyone with access. Do not enter any personal information that you do not want others to see.



Partial Day Options

The **Partial Day** pull down has five options to choose from:

1. **All Days** – Use if the days entered are all partial days. <u>Select this option when taking one partial day of leave.</u>
2. **End Day Only** – Use this when the end day only is a partial day.
3. **None** – This is the default value. Do not change this if none of the days are partial days.
4. **Start Day Only** – Use when the start day only is a partial day.
5. **Start and End Days** – Use when the start and end days are partial days.

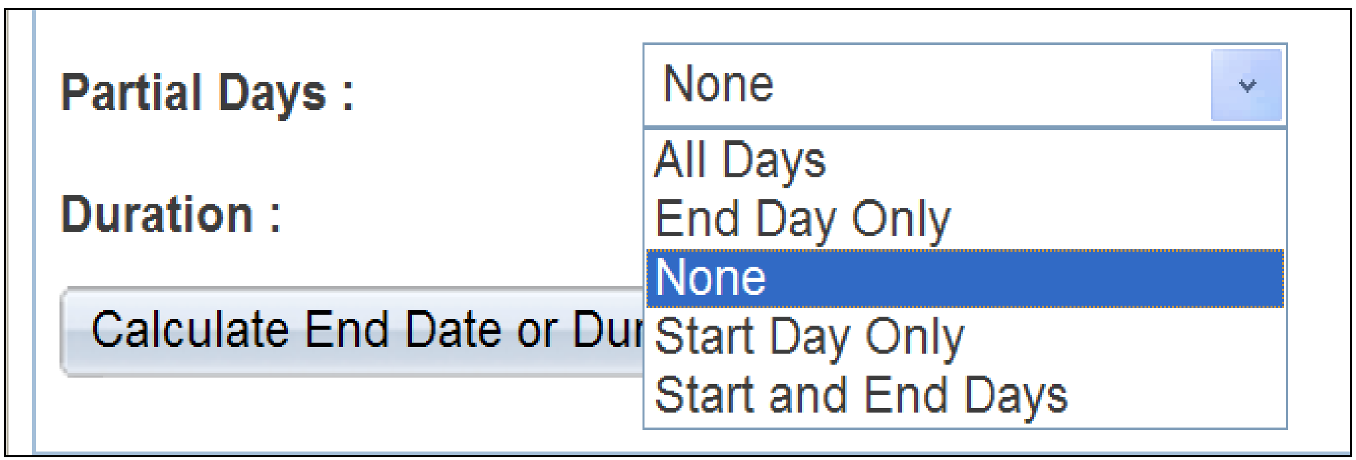


Partial Day Options (continued)

If your absence does not fit any of these options, you need to enter more than one request.

For example, if you are taking 3 days off and the middle day only is a partial day, enter this as 2 requests:

- The first day is one request (full day)
- The second day (partial) and third day (full) - use **Start Day Only** option



Forecast Absence Event

Most absence types require you to forecast your projected balances prior to submitting a request. The forecast process calculates anticipated balances up through the date being requested based on:

- All prior absence requests for that absence type, e.g., vacation, and anticipated entitlements
- Any scheduled increases in the employee accrual rate

If the absence type requires forecasting, the **Forecast** button is enabled after you select the **Absence Name** when making a new absence request. Click the **Forecast** button to determine whether you have enough entitlement to cover your request.

If you have the time available for the type of absence selected, the **Forecast Successful** message displays.

If eligible, the message below appears and you should **Submit** the request immediately.

Returned Value: ELIGIBLE
Completed Successfully!
Date Time: November 21,2012 at 10:37:08

Forecasting Absences

Reported Time Summary

Absence Event - select to hide

Returned Value: ELIGIBLE
Completed Successfully!
Date Time: November 21,2012 at 10:37:08

Absence Events Customize

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
☐	11/08/2012	11/09/2012	Vacation	Vacation	16.00	Hours	Details	Saved	Approval Monitor	Manager	☐	Forecast	Edit

Select All   Deselect All

Add Absence Event

Absence Entitlement Balances Customize

Current Balances

Entitlement Name	Balance as of 10/09/2012**	From	To	Accrual Period

Absence Balance Verification

Important Note: If you request an absence for a future time period, it is important to re-check your balance for that absence the week you plan to take it. If you enter an absence request for a future date, but use that same type of absence before the future date, you may not have sufficient hours to cover your initial request. Any portion of your absence that exceeds your entitlement balance, is treated as leave without pay.

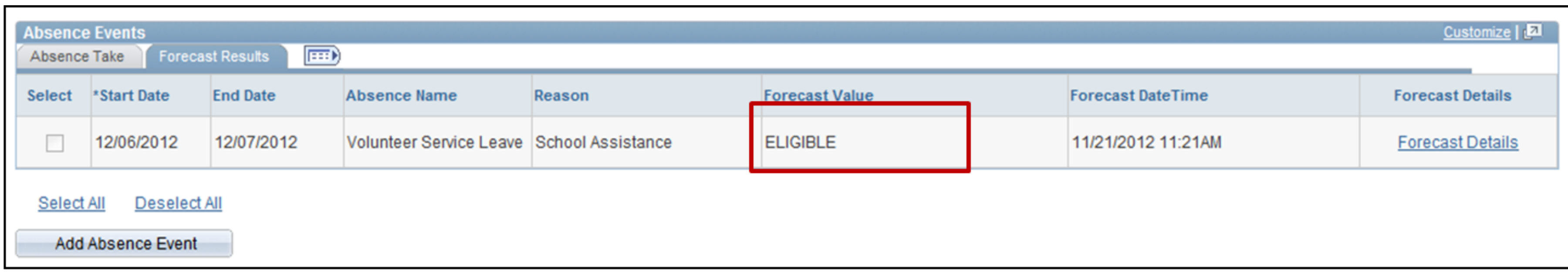
For example:

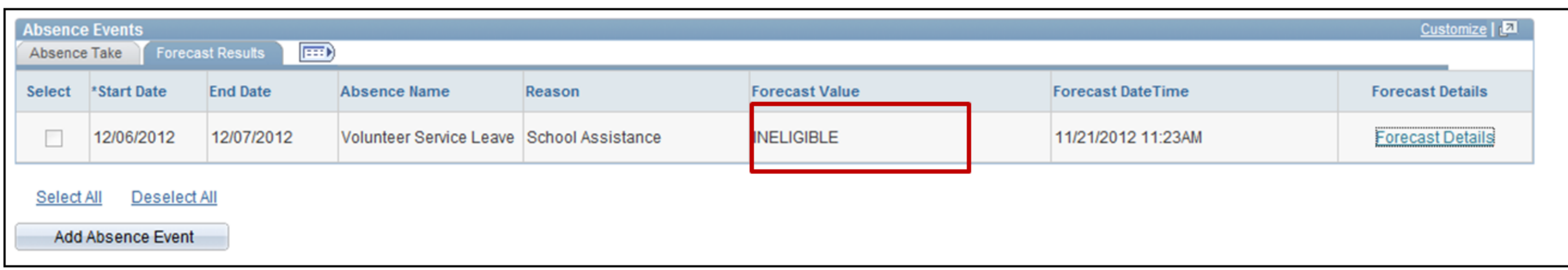
- You have 32 hours of personal leave.
- You input an absence request for 32 hours of personal leave for a trip 3 months from now, and the forecast result is successful.
- You submit the absence request and it is approved.
- Two weeks later, you need to take 16 hours of personal leave to visit your sick mother.
- You input an absence request for the 16 hours of personal leave and the forecast is successful.
- The future request now becomes ineligible because you have now taken 16 of those 32 hours
- When you re-check your balances, you see that you are now eligible for only 16 hours of leave.
- If you do update your absence request, 16 hours is processed as personal leave and 16 hours is processed as leave without pay.
- To avoid being on leave without pay, edit the request.

Absence Balance Verification (continued)

To verify that you still have sufficient balances for your absence, click on the **Absence Event** link and then select the **Forecast Results** tab. Check the **Forecast Value** tab to determine if you are still eligible for the leave. If not, edit the request and use a different type of leave for the time off.

Remember, if you do not adjust absence requests that have insufficient balances, Cardinal processes it as leave without pay.





Insufficient Absence Balance

When you make an absence request and do not have the sufficient entitlement balance, Cardinal displays the message below when you forecast.

Forecast Error:
You do not have sufficient leave balance for the date(s) or duration requested. Your forecasted balance includes current balance and projected accrual, less any approved, submitted, pushed back, or saved absence requests for this leave type, up through the begin date of this request. In order to submit this request, you can do one of the following: 1) Modify this request (change the dates, duration, or leave type) 2) Cancel or modify approved, submitted, pushed back, or saved requests for this leave type 3) Use the Leave Without Pay absence type (the absence will be unpaid)
Date Time: November 21,2012 at 11:10

When to Enter and Submit Absence Requests

Enter and submit absences in advance whenever possible.

Enter and submit planned absences as soon as the need for the leave is known in order to obtain advance approval from the supervisor.

Enter and submit unplanned absences such as sick leave, upon returning from the leave.

Submit absences immediately by clicking the **Submit** button each time you enter or edit an absence event.

Save for Later Option with Absences

The **Save for Later** button should not typically be used. This button allows you to save an absence entry and to complete it at a later date. It does not however, submit the absence through the workflow process to the supervisor for approval. Note that an absence event can also have a Status of **Saved** if you initiated an absence event and navigated away from the page or logged out of Cardinal without saving or submitting the entry.

Absences in **Saved** status appear in the timesheet grid section of the **Timesheet** page, along with absences that have been submitted. It is important to review the current status of absence requests to be sure all appropriate absences have been submitted for approval.

Absences in the **Saved** status are <u>not</u> routed for approval and thus, are not included the Absence Calculation or Time Administration processes.

Clicking the **Submit** button on the timesheet does not submit absences in a **Saved** status that appear on the timesheet grid. The **Submit** button on the timesheet only submits time (hours worked and comp / OT leave that shows in the Timesheet grid) that has not been submitted on the timesheet.

Steps to Submit a Saved Absence

The **Status** column in the **Absence Event** section displays the current status of the absence event. The **Reported Time Status** section displays absences and their status by date.

To submit an absence event that is in **Saved** status, you must do the following:

1. Click the **Edit** button
2. Make any changes that are needed
3. Click the **Forecast** button (if applicable)
4. Click the **Submit** button at the bottom of the page

Repeat this process for all saved absence events, one at a time.

Remember, clicking the **Submit** button on the timesheet only submits time on the timesheet. It does not submit absences in **Saved** status.

Absence Approval or Denial

Your supervisor may approve or deny an absence request. Once your supervisor reviews and takes action regarding your absence request, the status is updated on the **Timesheet** page and can be viewed in the **Reported Time Status** section and the **Absence Event** section under the **Status** field.

If the Supervisor approves the request, Cardinal allows you to edit the request. For example, if you had planned to use four hours of vacation, but used only two, you would be able to edit the request and adjust the hours. Be sure to **Submit** it right away.

FMLA, STD and WCL Absences

Select absence types must be assigned and/or entered by the Absence Management Administrator:

- **FMLA** (Family Medical Leave Act) – The Absence Management Administrator must enter a balance before it is available in the drop-down menu. Contact Human Resources for FMLA types of requests and for guidance on what to enter on the timesheet.
- **STD** (Short Term Disability) / **LTD** (Long Term Disability) – Only the Absence Management Administrator can enter these leave types.
- **WCL** (Workers Compensation Leave) – Only the Absence Management Administrator can enter this leave type.

FMLA entries, requires rows in the absence area on the **Timesheet** page:

- Enter FMLA hours on the first row and select the appropriate **Reason.**
- Enter the absence type being used on the second row equal to the FMLA hours on the first row. If you have no paid absence hours available (e.g. VAC, SCK, CPE), enter leave without pay (LNP).

Simulation: Entering Absence Requests

This simulation shows you how to enter absence requests. Click the Cardinal logo below to start the simulation.

Lesson 5: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer and click **Submit** to see if you chose the correct response.

To enter a new absence request, you click which of the following buttons first:

- Add Absence Event
- Forecast
- Absence Type

To make a change to an absence event, click the ____ button.

- Forecast
- Cancel
- Edit

Absences should be submitted <u>immediately</u> each time an absence event is entered/edited and forecasted.

- ◯ True
- ◯ False

Drag and place the steps in order when you need to **Submit** an absence (leave) request that is in the **Saved** status.

1. Click the **Submit** button.
2. Click the **Edit** button on the row of the absence that is in the **Saved** status that you need to **Submit**.
3. Click to expand the **Add Absence Event - select to View** section on the **Timesheet** page.
4. Click the **Forecast** button (if required).

Lesson 5: Summary

In this lesson, you learned:

- How to enter an absence request on the **Timesheet** page.
- The **Absence Entitlement Balances** section allows you to view your current absence balances (except compensatory leave and overtime leave).
- To enter a new absence request click on the **Add Absence Event** button in the **Absence Events** section.
- When an absence type requires you to forecast your projected balances the **Forecast** button is enabled.
- Cardinal sends you an email notification regarding the status of your absence request, e.g., approved or denied.
- You can edit an existing absence request through the **Timesheet** page.

Lesson 6: Timesheet Exceptions and Adjustments

In this lesson, you will learn about the following topics.

- Understanding Exceptions
- Adjusting the Timesheet

Understanding Exceptions

Once you submit your reported time, Time Administration checks it against business rules. The Time Administration process may identify:

- No exceptions – Submitted time becomes payable time with no exceptions.
- Low or medium severity exceptions – Submitted time becomes payable time with low or medium exceptions.
- High severity exceptions – Submitted time does not become payable time with a high severity exception. Once corrected, it is resubmitted through Time Administration and becomes payable time when successfully processed.

Understanding Exceptions (continued)

Even when your submitted time is converted into payable time, you may need to adjust your timesheet.

For example:

- Your supervisor instructs you to change your timesheet, e.g., you charged a portion of time to the wrong project.
- You realize you made an error and your reported time requires an adjustment, e.g., you charged more hours to regular time than allowed in the pay period.

No Exceptions

When there are no exceptions with your submitted reported time, it routes to your Supervisor as payable time for approval.

You can view exceptions by opening the **Reported Time Status** section of the **Timesheet** page. If there are no exceptions, the information shown in the **Reported Time Status** section of the **Timesheet** page reports dates with approved status.

From Monday 01/23/2012 to Sunday 01/29/2012

Mon 1/23	Tue 1/24	Wed 1/25	Thu 1/26	Fri 1/27	Sat 1/28	Sun 1/29	Total Hours	Time Reporting Code	Taskgroup	Business Unit	Telecommute	Equipment ID	Cha
				2.00			2.00	CPT - Compensatory Leave	VDOTCOMREC	50100			Ch
8.00	8.00	4.00	8.00	6.00			34.00	RGS - Regular Earnings - S	VDOTCOMREC	50100			Ch
		4.00					4.00	VAC - Vacation	VDOTCOMREQ	50100			Ch

Reported Time Status

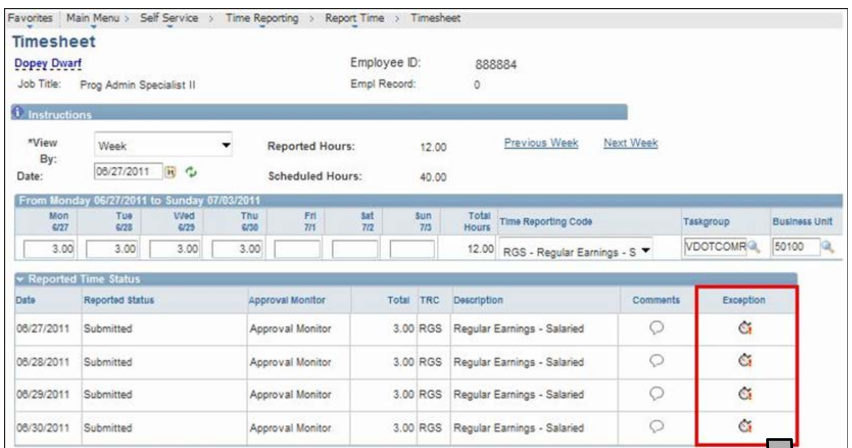
Date	Reported Status	Approval Monitor	Total	TRC	Description	Comments
01/23/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/24/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/25/2012	Submitted	Approval Monitor	4.00	RGS	Regular Earnings - Salaried	
01/25/2012	Needs Approval	Approval Monitor	4.00	VAC	Vacation	
01/26/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/27/2012	Submitted	Approval Monitor	2.00	CPT	Compensatory Leave Taken	
01/27/2012	Submitted	Approval Monitor	6.00	RGS	Regular Earnings - Salaried	

Click the image to enlarge

Exceptions

If there are exceptions, the **Exceptions** field appears in the **Reported Time Status** section of the **Timesheet** page and displays a picture of an alarm clock. Click on the alarm clock to open the **Exceptions** page. The **Exceptions** page provides additional information about the exception(s), including the **Description**, **Date** and **Severity** level.

Please refer to the **Exceptions** job aid for a list of exceptions (low, medium and high) and the steps to correct it.



Click the image to enlarge

Click the image to enlarge

Adjusting the Timesheet

When you review your timesheet, you may notice items that require adjustment. For example, you may want to:

- Correct an error identified by Time Administration
- Correct a TRC
- Update the number of hours charged to a charge distribution
- Change a charge distribution
- Update an absence request
- Cancel an absence request

Timesheet adjustments can only be made for the current fiscal year. If you have adjustments that occurred prior to the current fiscal year, contact your supervisor.

Canceling an Absence Request

To cancel an absence request:

1. Click the **Edit** button for the request you need to cancel
2. Click the **Cancel** checkbox
3. Click the **Submit** button immediately

The status of the absence changes to **Cancelled** and Cardinal adjusts the absence balance by the following day, after the absence calculation process has completed.

Please refer to the **TA Time Entry Scenarios** job aid for more details.

Absence Event - select to hide

Absence Events — Customize

Absence Take | Forecast Results

*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
01/25/2013	01/25/2013	VSDP Sick Leave	VSDP Sick Leave	8.00	Hours	Details	Saved	Approval Monitor	Employee	☑	Forecast	Edit

Absence Event - select to hide

Absence Events — Customize

Absence Take | Forecast Results

*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
01/25/2013	01/25/2013	VSDP Sick Leave	VSDP Sick Leave	8.00	Hours	Details	Cancelled	Approval Monitor	Employee	☐	Forecast	Edit

Canceling an Absence Request (continued)

Absence Event - select to hide

Absence Events Customize |

Absence Take | Forecast Results

*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
01/25/2013	01/25/2013	VSDP Sick Leave	VSDP Sick Leave	8.00	Hours	Details	Saved	Approval Monitor	Employee	☑	Forecast	Edit

Absence Event - select to hide

Absence Events Customize |

Absence Take | Forecast Results

*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
01/25/2013	01/25/2013	VSDP Sick Leave	VSDP Sick Leave	8.00	Hours	Details	Cancelled	Approval Monitor	Employee	☐	Forecast	Edit

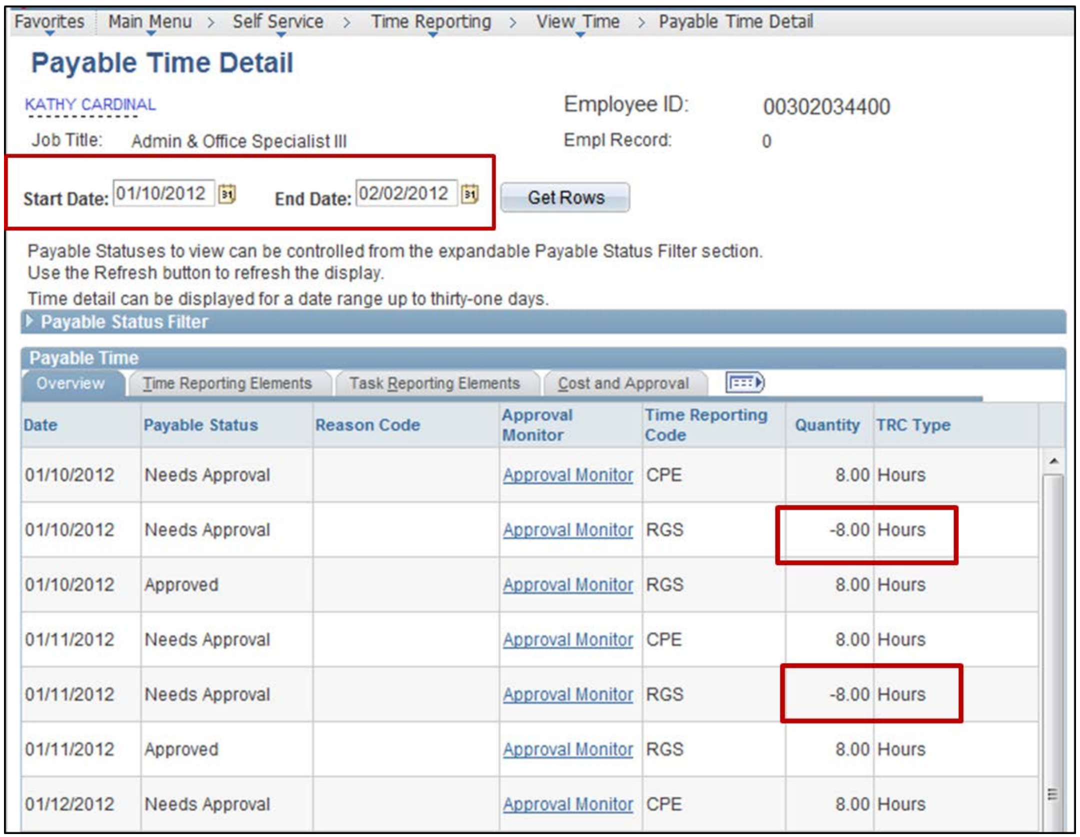
Changing an Absence Request

To change the absence request:

1. Click the **Edit** button for the request you need to change.
2. Make the necessary adjustments (change absence type or duration).
3. Click the **Forecast** button.
4. Click the **Submit** button immediately.

Payable Time Detail

Although Cardinal does not allow you to enter negative hours, you may see negative hours on the **Payable Time Detail** page, which displays the **Approval Status** of payable time (hours entered in the timesheet grid).



Click the image to enlarge

Payable Time Detail (continued)

Cardinal generates those entries when adjustments are made to the timesheet after it has been approved.

For example:

- An employee charges 8 hours of time to Project 0000012343.
- The supervisor approves the time.
- The employee realizes that he actually took 8 hours of CPE that day and makes the adjustment on his timesheet.
- Cardinal would generate a -8 for Project 0000012343 entry on the **Payable Time Detail** page so his time is not charged to that project.

Steps to Adjust the Timesheet

To adjust your timesheet:

1. Select the week in which the changes need to be made
2. Go to the appropriate section on the timesheet
3. Make the necessary update(s)
4. Resubmit the time for Time Administration processing

Do not enter negative hours when making an adjustment on the timesheet. For example, if you entered **10** hours of regular time instead of **8**, delete **10** and type **8**. Do not enter **-2**.

If you add an absence request, after you have submitted time, go back to the timesheet and adjust the time entered for that day as the system does not do it for you.

For example, you entered 8 hours on Wednesday as regular hours. You then remember you took vacation on Wednesday.

After you enter the request for Wednesday and submit, the 8 hours reflect as vacation.

Go to Wednesday on the timesheet and delete the 8 hours and then submit your time.

Steps to Adjust the Timesheet (continued)

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Timesheet

Job Title: Fin Svcs Mgr I   Empl Record: 0

Instructions

*View By: Week   Reported Hours: 48.00   Previous Week   Next Week

Date: 11/05/2012   Scheduled Hours: 40.00

From Monday 11/05/2012 to Sunday 11/11/2012

Mon 11/5	Tue 11/6	Wed 11/7	Thu 11/8	Fri 11/9	Sat 11/10	Sun 11/11	Total Hours	Time Reporting Code	Taskgroup	Business Unit
8.00	8.00	8.00	8.00	8.00			40.00	RGS - Regular Earnings - Sa	VDOTCOMREQ	50100
		8.00					8.00	VAC - Vacation	VDOTCOMREQ	50100

From Monday 11/05/2012 to Sunday 11/11/2012

Mon 11/5	Tue 11/6	Wed 11/7	Thu 11/8	Fri 11/9	Sat 11/10	Sun 11/11	Total Hours	Time Reporting Code	Taskgroup	Business Unit
8.00	8.00		8.00	8.00			32.00	RGS - Regular Earnings - Sa	VDOTCOMREQ	50100
		8.00					8.00	VAC - Vacation	VDOTCOMREQ	50100

Simulation: Making Timesheet Adjustments

This simulation shows you how to adjust the timesheet. Click the Cardinal logo below to start the simulation.

Lesson 6: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer and click **Submit** to see if you chose the correct response.

A high exception prevents payable time from being generated.

- True
- False

Put the steps in order for making a timesheet adjustment by selecting from the drop down list.

-- Select --

-- Select --

-- Select --

-- Select --

Lesson 6: Summary

In this lesson, you learned:

- You can view exceptions by opening the **Reported Time Status** section once your time is submitted and processed by Time Administration.
- Only high exceptions prevent payable time from being generated.
- You can update Time Reporting Codes, charge distributions, etc. on your timesheet.
- Cardinal allows you to cancel an absence event when the absence is not taken.

Lesson 7: Reports and Online Inquiries

In this lesson, you will learn about the following topics:

- Reports
- Online Inquiries

Reports

Three key Cardinal reports can help you manage your time and absences:

- **Timesheet Report**
- **Timesheet Exception Report**
- **Employee Leave Detail Report**

These reports are available through the **Report Manager** page. You navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Reporting Tools > Report Manager

Timesheet Report

This report provides the following for a pay period or range of pay periods by day depending on the criteria entered on the Run Control page:

- A record of time and absence hours
- The status of time and absences
    - **SV** = Saved
    - **SB** = Submitted
    - **NA** = Needs Approval
    - **AP** = Approved
    - **DN** = Denied
    - **AJ** = Adjusted
- Name of the Approver
- For productive time, the Time Reporting Codes (TRCs) and charge distribution of timesheet entries by day

Refer to the **Running the Timesheet Report – Self Service** job aid for more information.

Timesheet Schedule and Exception Report

This report contains two sections. The first section is an **Overtime Review** for both salaried and hourly employees. The second section, **Deviation from Scheduled Hours** provides a summary of exceptions to reported / payable time.

Every salaried employee in Cardinal is assigned a weekly or bi-weekly schedule. All hourly employees have a schedule of zero hours. For salaried employees, the report identifies employees who have worked more or less than their scheduled hours for the pay period. For both salaried and hourly employees, this report tracks eligible overtime and confirms that timesheets are complete (submitted) and ready to be allocated.

Refer to the **Running the Timesheet Exception Report** job aid for more information.

Employee Leave Detail Report

The Employee Leave Report displays leave balances and related detail transactions (if selected) by individual code, or specified group of organization codes (e.g. a district-wide or residency-wide as reflected on the organization tree).

The summary section includes any/all leave types with any activity during the Leave Year through the Pay Period End Date specified in the run control parameters. At a minimum this includes leave types that accrue (e.g., vacation and sick). Even if the current balance for a specific leave type calculates to zero, that leave type is included if there is any activity including accruals.

If a leave type has no activity, has zero balance forward, and has zero current balance for the time span of the report as specified in the run control parameters, that leave type is not included on the report.

Employee Leave Detail Report (continued)

This report has three sections:

- Section 1 of this SQR report displays summary data by Leave Type, Year-to-date for the Employee.
- Section 2 of this SQR report displays **Employment Leave Takes, Year-to-date** from the beginning of the Leave Year through the Pay Period End Date for all Takes that have been **Finalized**.
- Section 3 of this SQR report displays **Outstanding Leave Take Request**, through the end of the Leave Year related to the Pay Period End Date; they may be past, present or future.

Refer to the **Employee Leave Report** job aid for more information.

Online Inquiries

The following online inquiries are available to self-service users to view directly on the **Timesheet** page:

- **Compensatory Time** – Shows your compensatory and overtime leave balances
- **Reported Time Status** – Displays the status of time and absences entered on the **Timesheet** page
  - Time entered in the timesheet grid displays one of two statuses:
    - **Saved** – No action can be taken until it is submitted
    - **Submitted** – Time submitted to supervisor for review and approval

    Note: To see approval status, access **Payable Time Details** in the **View** menu
  - Absences entered in the **Absence Event** section displays one of four statuses:
    - **Saved** – No action can be taken until it is submitted
    - **Needs Approval** – Absence is submitted but not yet approved
    - **Approved** – Absence was approved by supervisor
    - **Denied** – Absence was denied by supervisor
- **Absence Entitlement Balances** – Shows your absence balances by absence type

Navigate to these inquiries using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > Report Time > Timesheet

Online Inquiries (continued)

The following inquiries are available to self service users on the View Time Menu:

- **Monthly Schedule** – Displays a monthly calendar which shows the following:
  - Employee schedule
  - Designated holidays
  - Approved absence requests
- **Compensatory Time** – Displays compensatory time balance
- **Exceptions** – Displays a list of exceptions and whether they are high, medium or low
- **Payable Time Summary** – Displays a weekly view of payable time
- **Payable Time Details** – Displays the approval status of submitted time
- **Absence Request History** – Displays details of absence requests
- **Absence Balances** – Displays absence balances and a link to forecast balances for a future date

Navigate to these inquiries using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > View Time > (select which item you want to view)

Lesson 7: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question, select your answer and click **Submit** to see if you chose the correct response.

Drag and connect the **View Time** menu option on the right with what it displays on the left.

Displays a monthly calendar which shows the employee schedule, designated holidays and approved absence requests.	Absence Balances
Displays absence balances and a link to forecast balances for a future date.	Payable Time Detail
Displays the approval status of submitted time entered in the timesheet grid.	Monthly Schedule

Lesson 7: Summary

In this lesson, you learned:

- Reports and online inquiries are available to help you manage time and absences.
- How to navigate to the **TA Reports** menu to access Time & Attendance Reports.
- Online inquiries available on the **Timesheet** page.
- Online inquiries available through the **View Time** page***.***

Course Summary

In this course, you learned how to:

- Understand key concepts and define key terms related to Time & Attendance.
- Navigate to Cardinal HCM and the **Timesheet** page.
- Enter regular and overtime hours on the timesheet.
- View compensatory leave and overtime leave on the timesheet.
- Document holidays.
- View current Absence Entitlement Balances.
- Enter Absence Requests.
- Adjust Absence Requests.
- Understand the reasons for timesheet exceptions.
- Make timesheet adjustments.
- Access key reports and online inquiries.

Course Evaluation

Congratulations! You have successfully completed the **TA362: Time & Attendance Employee Self Service** course. Please use the evaluation link to assess this course.

Click here to access the survey

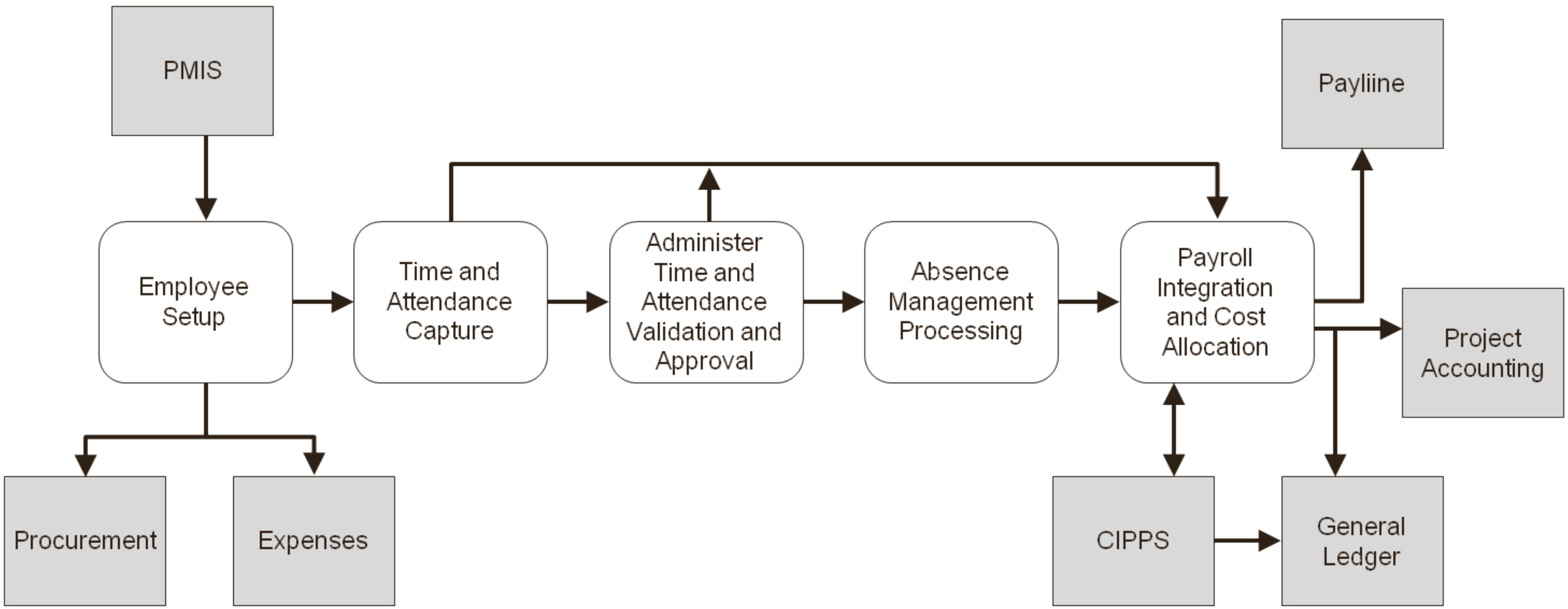
Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the **Exit Course** button.

Appendix

- Time & Attendance Process
- Key Terms
- Screenshots and Diagrams

Time & Attendance Process

This diagram provides an overview of the Time & Attendance process.



Time & Attendance Process (continued)

Employee Setup

Employees in Cardinal and this process includes:

- Inputting job, personal and position data
- Enrolling an employee as a time reporter
- Assigning work schedules
- Enrolling employees in appropriate leave plans and leave benefits

Time & Attendance Capture

Time is captured by employees after being set up as time reporters by:

- Report time
- Request absences
- View and correct timesheet errors
- View and run Time & Attendance reports

Time & Attendance Process (continued)

<u>Administer Time & Attendance Validation and Approval</u>

The Time Administration process validates. It also:

- Generates payable time
- Identifies exceptions
- Processes payable time and sends it to Payroll

Supervisors can:

- Approve or deny time and absence requests
- Complete the timesheet on behalf of the employee

<u>Payroll Integration and Cost Allocation</u>

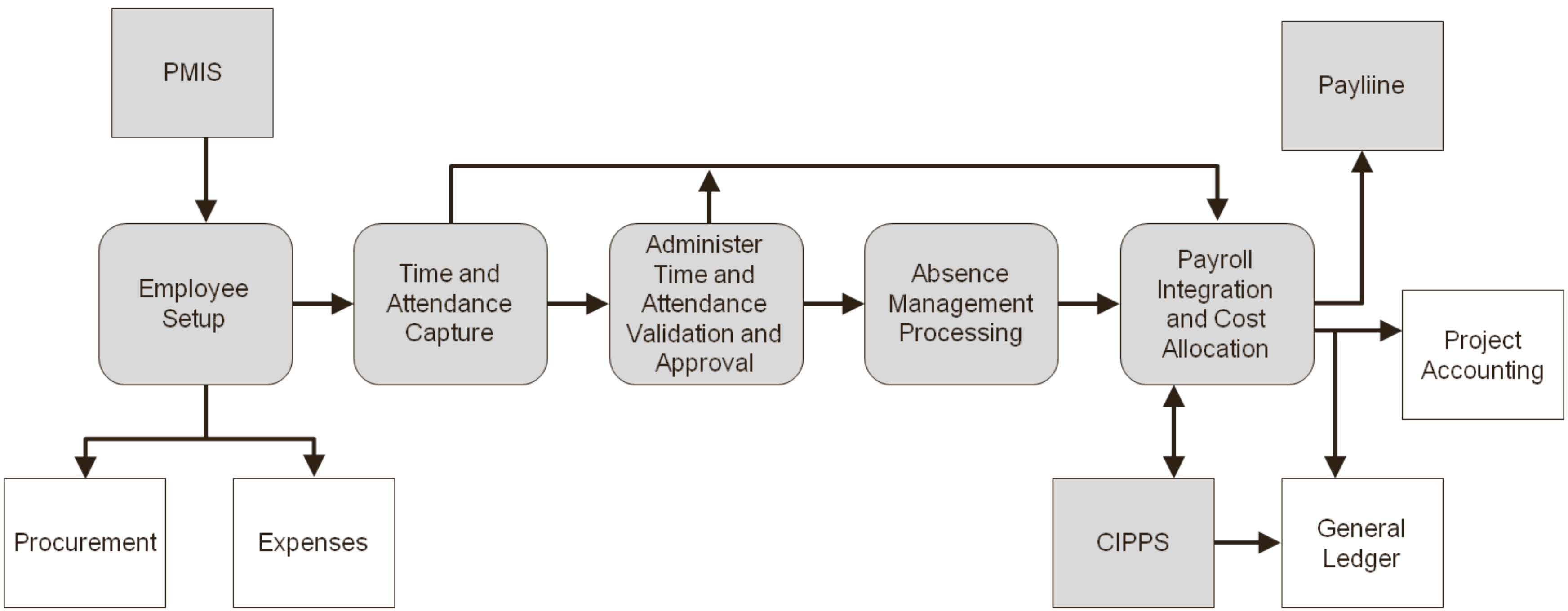
Approved payable time:

- Used to allocate payroll costs according to the timesheet charge distributions

Integration with Time & Attendance

Time & Attendance integrates with four other Cardinal modules, which include:

- Procurement
- Expenses
- Project Accounting
- General Ledger



Integration with Time & Attendance (continued)

Procurement

Employee information that is created during the Time & Attendance Employee Setup process is used by the Small Purchase Charge Card Program in the Procurement module.

Expenses

Employee information that is created during the Time & Attendance Employee Setup process is used by the Expenses module in the Accounts Payable functional area to process employee travel and business expense reimbursements.

Project Accounting

Employee labor costs that are charged to projects are sent to Project Accounting when employee pay is distributed according to the charge distribution entered on employee timesheets.

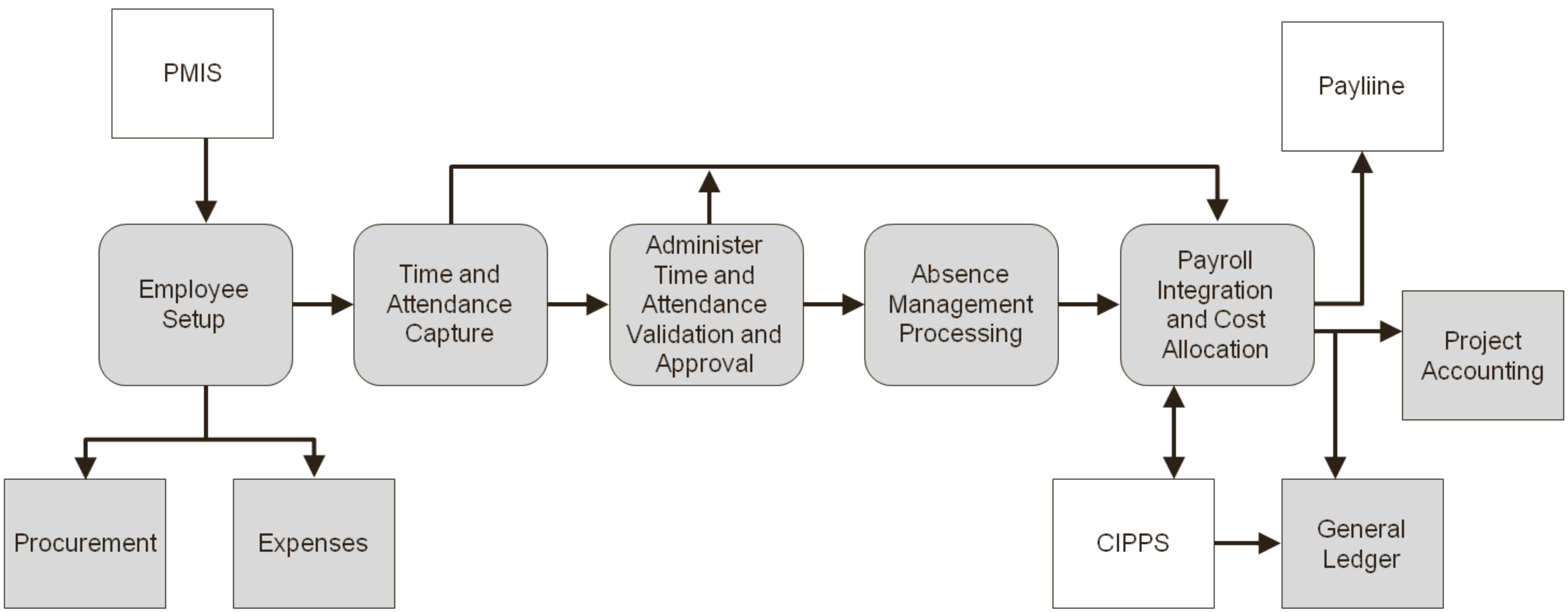
General Ledger

Employee labor charges are sent to the General Ledger functional area when employee pay is distributed according to the charge distribution entered on employee timesheets.

Interfaces with PMIS, CIPPS and Payline

Time & Attendance also interfaces daily with several external systems:

- Personnel Management Information System (PMIS)
- Commonwealth Integrated Payroll & Personnel System (CIPPS)
- Payline



Interfaces with PMIS, CIPPS and Payline (continued)

Personnel Management Information System (PMIS)

New and updated employee and position information is first entered into PMIS. PMIS then sends the information to Cardinal.

Commonwealth Integrated Payroll & Personnel System (CIPPS)

Timesheet entries for hourly employees and overtime entries for both hourly and salaried employees are sent to CIPPS to create employee pay. Timesheet entries also identify how employee regular and overtime pay is charged.

Payline

Absence information is sent periodically to the Department of Accounts to allow employees to view their absence balances via Payline.

Key Terms - General

Self Service: The ability for employees to enter their own time and absence requests directly in Cardinal.

Self Service User/Time Reporter: An employee who reports time.

Timesheet Page: The page in Cardinal where Self Service users:

- Enter and submit the time they worked
- View compensatory and overtime leave balances
- View absence entitlement balances
- Enter and submit absence requests

Work Schedule: The days and hours an employee is scheduled to work. Cardinal uses work schedules to validate time and calculate absences.

Key Terms – Timesheet Entry

Business Unit: Identifies a state agency. VDOT is 50100.

Time Reporting Code (TRC): Classifies hours recorded on the timesheet, e.g., Regular (RGS), Overtime (OT1, EOT, etc.), Compensatory Leave (CPE), etc.

ChartFields: Identifies how productive and non-productive time is charged.

SpeedType: Provides a short cut that auto populates some ChartFields on a transaction. Additional fields (e.g., Account) may need to be entered manually to successfully submit time.

Key Terms – Timesheet Processing

Reported Time: Time that has been recorded on a timesheet but not processed by Time Administration.

Exception: An error or warning regarding reported / payable time that requires review or attention.

Lockout: A period of time that a user is temporarily prevented from making prior period adjustments on timesheets. This is normally at the close of the pay period when timesheets are due.

Submitted Time: Time that has been reported and submitted for Time Administration.

Time Administration: A batch process that validates submitted time against Time Reporting Rules and generates payable time. This process also generates exceptions to Reported time.

Key Terms – Timesheet Processing (continued)

Time Reporting Rules: A set of defined business rules that Time Administration uses to validate Reported time. An example of a Time Reporting Rule: *Scheduled overtime for salaried nonexempt employees cannot be reported unless 40 productive hours have been worked in the work week*.

Payable Time: Time that has been reported, submitted, and successfully processed through Time Administration. To be successfully processed means that either no exceptions or low/medium exceptions are reported. Payable time is sent to the employee's supervisor for approval.

Reported Time Status: The section on the **Timesheet** page where reported / payable time and exceptions can be viewed.

Key Terms – Absence Management

Absence Entitlement: The hours or days of leave an employee has accrued for an absence type, e.g., Vacation, VSDP Sick, VSDP Personal.

Accrual Periods: The time periods by which employees earn leave, e.g., a pay period for Vacation, a leave year for VSDP Personal, etc.

Entitlement Balance: The number of hours of unused entitlement for a particular absence type.

Absence Event: The consecutive period of time an employee is absent for the same reason, e.g., Vacation, VSDP Sick, VSDP Personal, etc.

Absence Name: The name given to a specific type of absence, e.g., Vacation, VSDP Sick, VSDP Personal, etc.

Absence Reason: The additional classification of the absence type for an absence event, e.g., Jury Duty (absence reason) is a possible classification for Civil and Work-Related Leave (absence type).

Absence Take: The absence type and amount of time that an employee takes for an absence event.

Charging Time to Multiple Distributions

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Timesheet

Timesheet

Dopey Dwarf

Employee ID: 888884

Job Title: Prog Admin Specialist II

Empl Record: 0

Instructions

*View By: Week

Date: 07/18/2011

Reported Hours: 0.00

Scheduled Hours: 40.00

Previous Week   Next Week

From Monday 07/18/2011 to Sunday 07/24/2011

Mon 7/18	Tue 7/19	Wed 7/20	Thu 7/21	Fri 7/22	Sat 7/23	Sun 7/24	Total Hours	Time Reporting Code
8.00	8.00							RGS - Regular Earnings - Sala
		4.00						RGS - Regular Earnings - Sala
		4.00	8.00	6.00				RGS - Regular Earnings - Sala
				2.00				CPE - Compensatory Leave Ea

Reported Time Status

Reported Time Summary

Absence Event - select to view

Save for Later   Submit

Click the image to return

Compensatory Time

Compensatory Time

Kathy Cardinal

Job Title: Admin & Office Specialist III

Employee ID: 0030203

Empl Record: 0

Comp Time Balance Summary

Compensatory Time Off Plan:	COMP_LEAVE	**Expiration Period:**	Years
Date:	02/06/2012	**Period Count:**	1
Balance at Start of Day:	24.00		

***Show Time Expiring in:** One Year

Expiring Time Earned Customize | Find | View All | | First 1-3 of 3 Last

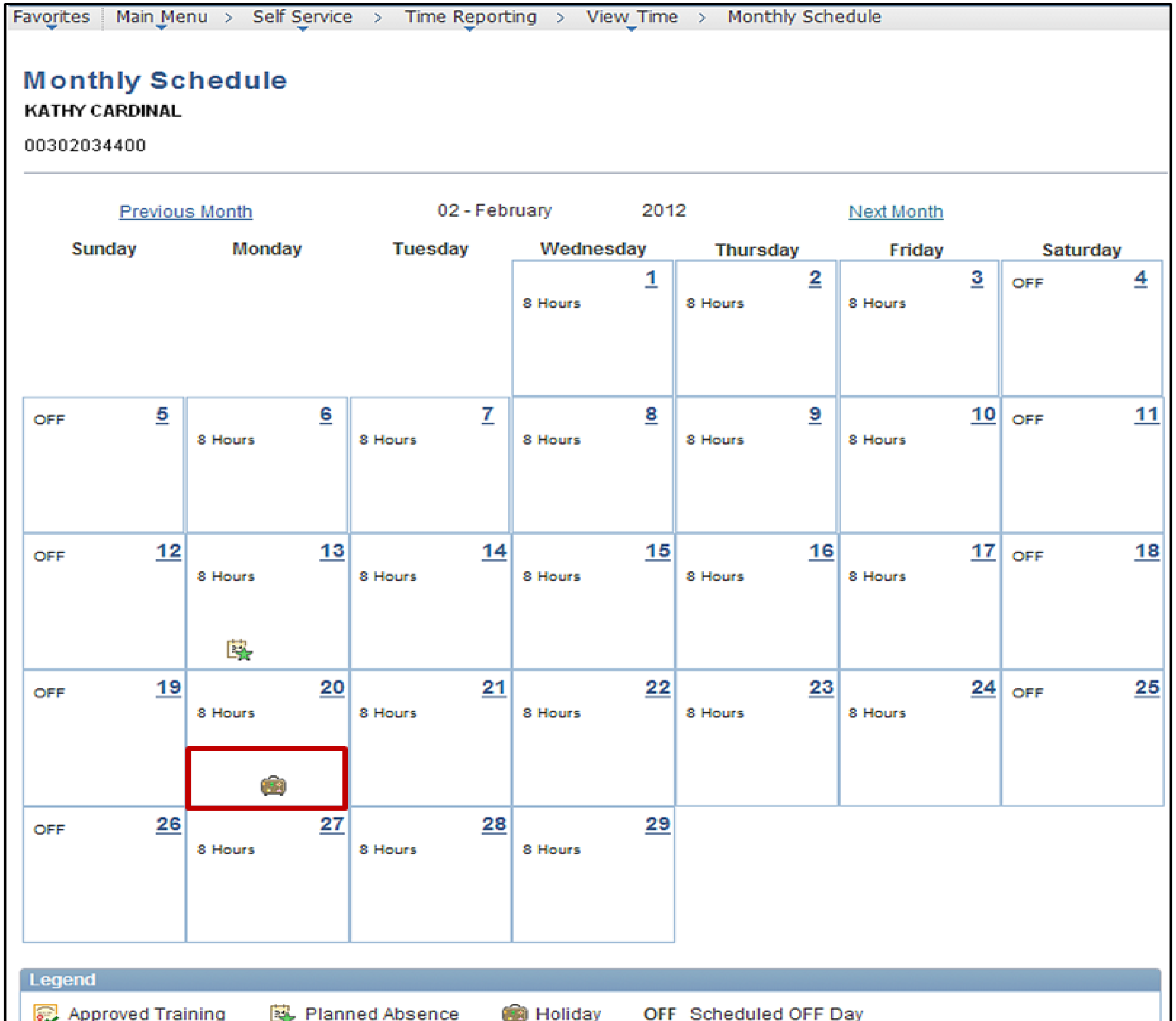
Expiration Date	Quantity	Ending Balance
01/10/2013	8.00	16.00
01/11/2013	8.00	8.00
01/12/2013	8.00	0.00

Go To: Self Service

Time Reporting

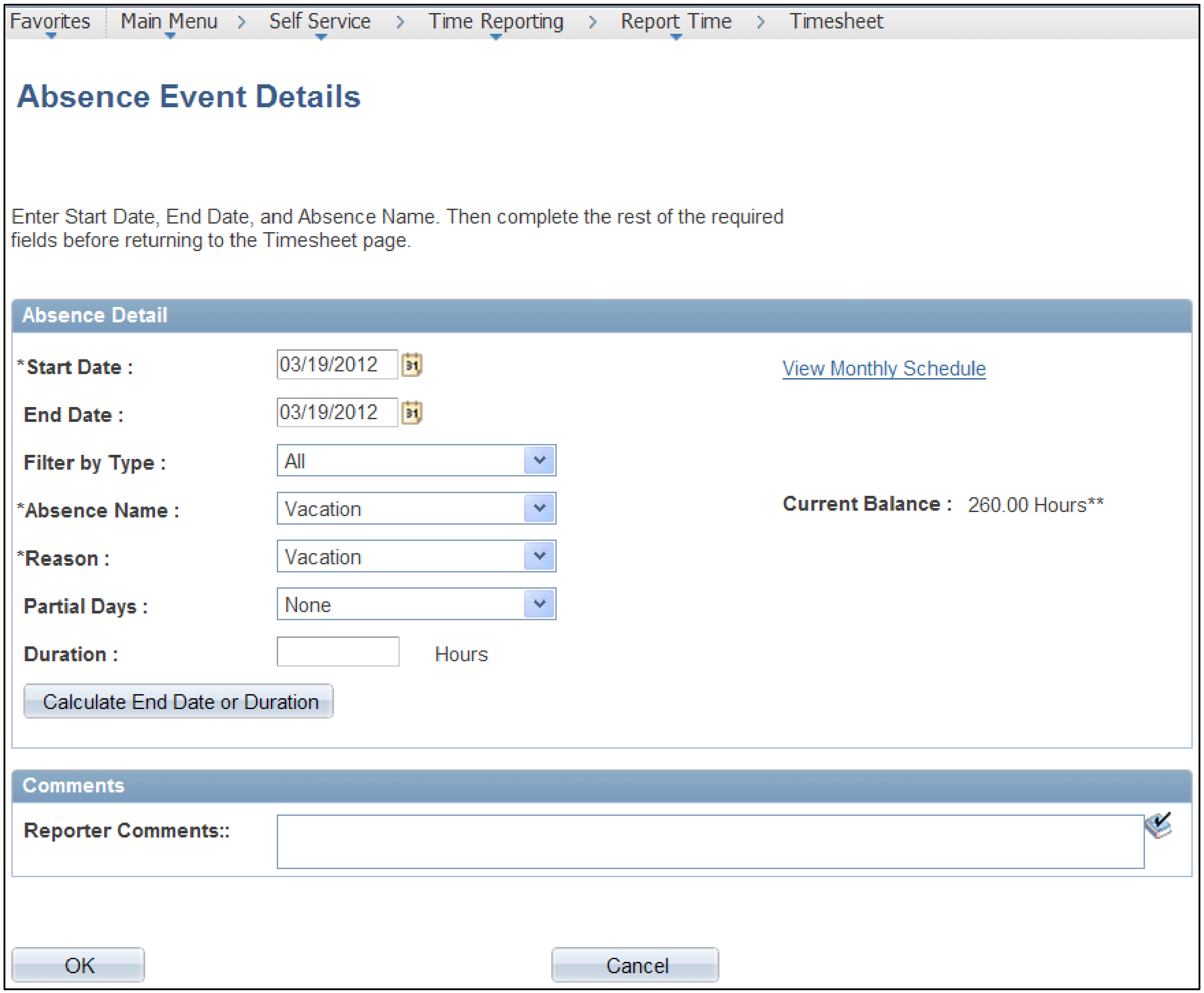
Click the image to return

Monthly Schedule



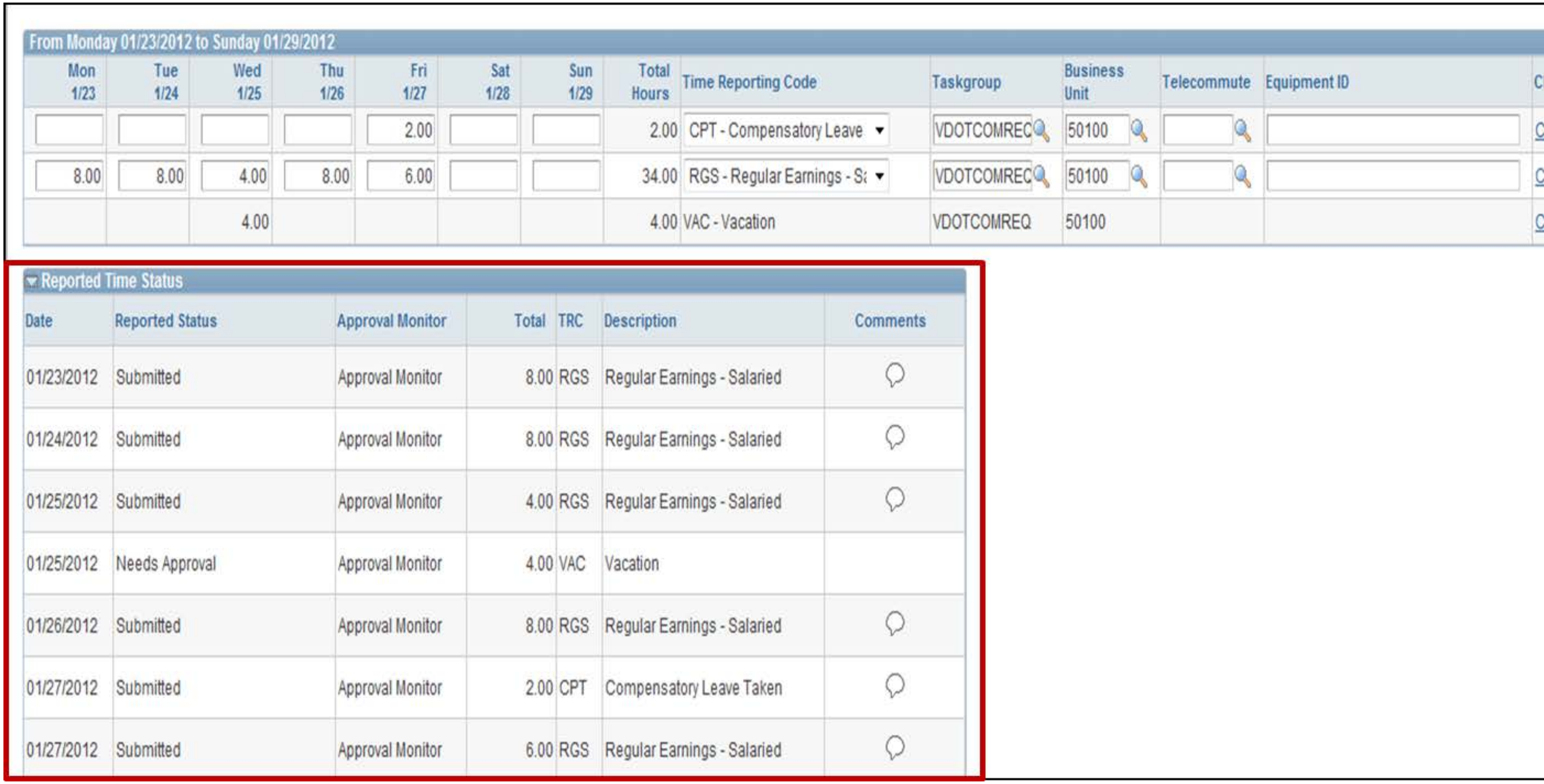
Click the image to return

Absence Events Details Page



Click the image to return

Reported Time Status Section – No Exceptions



From Monday 01/23/2012 to Sunday 01/29/2012

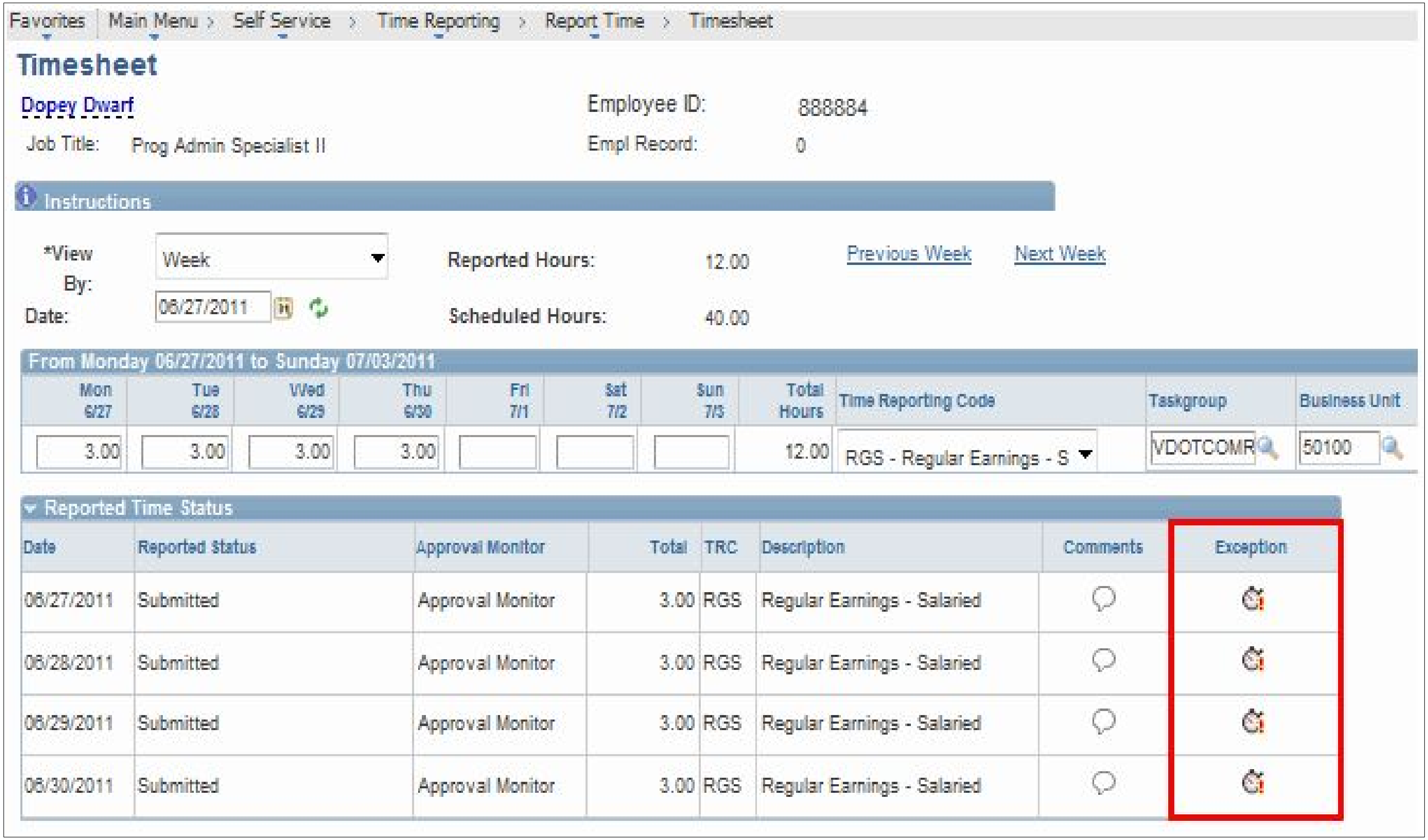
Mon 1/23	Tue 1/24	Wed 1/25	Thu 1/26	Fri 1/27	Sat 1/28	Sun 1/29	Total Hours	Time Reporting Code	Taskgroup	Business Unit	Telecommute	Equipment ID	Ch
				2.00			2.00	CPT - Compensatory Leave	VDOTCOMREC	50100			Ch
8.00	8.00	4.00	8.00	6.00			34.00	RGS - Regular Earnings - S:	VDOTCOMREC	50100			Ch
		4.00					4.00	VAC - Vacation	VDOTCOMREQ	50100			Ch

Reported Time Status

Date	Reported Status	Approval Monitor	Total	TRC	Description	Comments
01/23/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/24/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/25/2012	Submitted	Approval Monitor	4.00	RGS	Regular Earnings - Salaried	
01/25/2012	Needs Approval	Approval Monitor	4.00	VAC	Vacation	
01/26/2012	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried	
01/27/2012	Submitted	Approval Monitor	2.00	CPT	Compensatory Leave Taken	
01/27/2012	Submitted	Approval Monitor	6.00	RGS	Regular Earnings - Salaried	

Click the image to return

Exceptions



Click the image to return

Exceptions, Description and Severity

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Timesheet

New Window

Exceptions

Dopey Dwarf

Employee ID: 888884

Job Title: Prog Admin Specialist II

Empl Record: 0

Payable time will be created for time with Low or Medium severity exceptions.
Payable time will not be created for time with a High severity exception.

Filtering Options

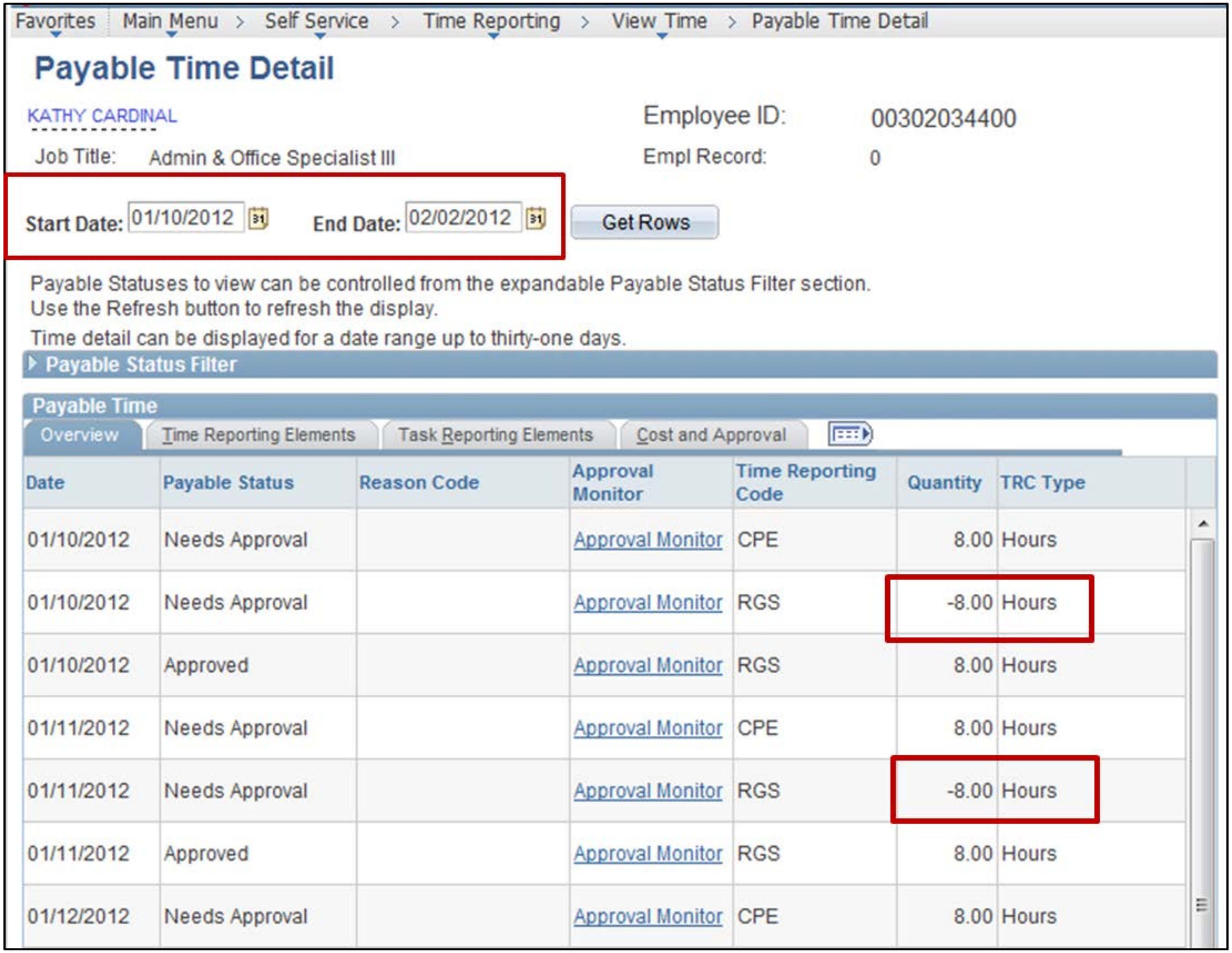
Exceptions — Customize | Find | First 1-4 of 4 Last

Overview | Details

Exception ID	Description	Date	Severity
TLX00110	Invalid Combo Code	06/27/2011	High
TLX00110	Invalid Combo Code	06/28/2011	High
TLX00110	Invalid Combo Code	06/29/2011	High
TLX00110	Invalid Combo Code	06/30/2011	High

Click the image to return

Payable Time Detail Page



Favorites | Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail

Payable Time Detail

KATHY CARDINAL

Employee ID: 00302034400

Job Title: Admin & Office Specialist III

Empl Record: 0

Start Date: 01/10/2012 **End Date:** 02/02/2012 Get Rows

Payable Statuses to view can be controlled from the expandable Payable Status Filter section.
Use the Refresh button to refresh the display.
Time detail can be displayed for a date range up to thirty-one days.

Payable Status Filter

Payable Time

Overview | Time Reporting Elements | Task Reporting Elements | Cost and Approval

Date	Payable Status	Reason Code	Approval Monitor	Time Reporting Code	Quantity	TRC Type
01/10/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours
01/10/2012	Needs Approval		Approval Monitor	RGS	-8.00	Hours
01/10/2012	Approved		Approval Monitor	RGS	8.00	Hours
01/11/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours
01/11/2012	Needs Approval		Approval Monitor	RGS	-8.00	Hours
01/11/2012	Approved		Approval Monitor	RGS	8.00	Hours
01/12/2012	Needs Approval		Approval Monitor	CPE	8.00	Hours

Click the image to return