TA363: Time & Attendance Administration

Instructor Led Training

Revised 06/04/2013

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.

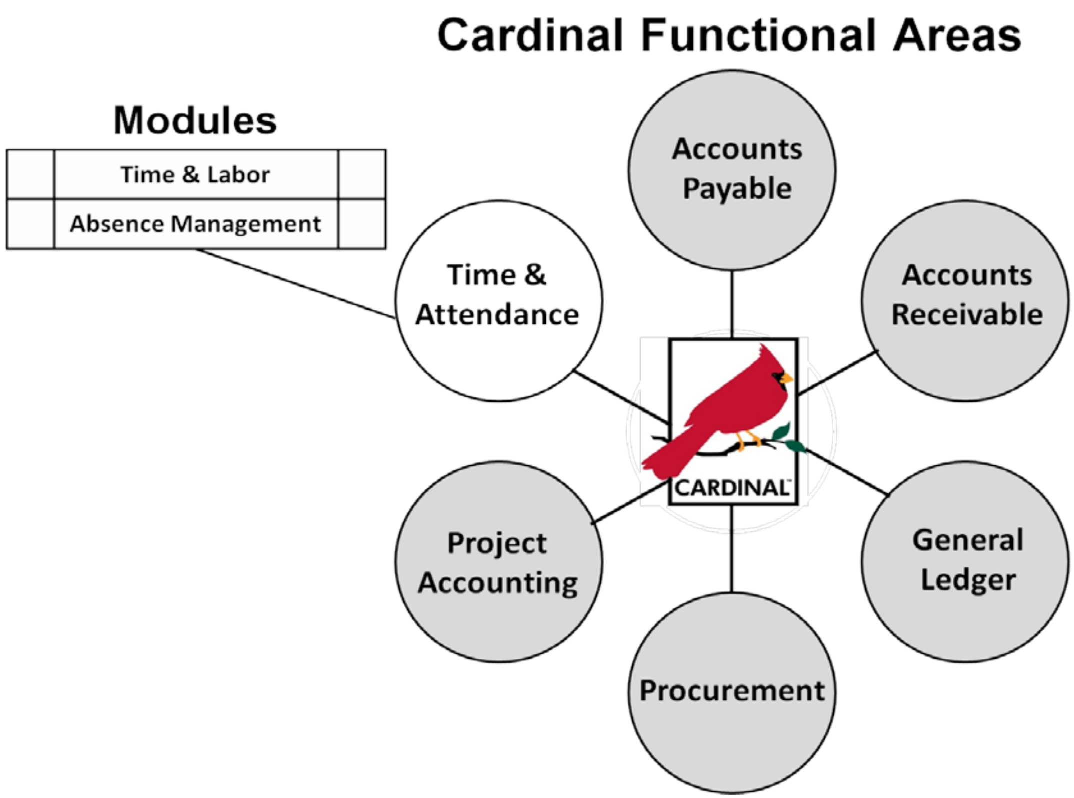
In this course, we will show you the key procedures for creating, managing, and maintaining Time Reporters in Cardinal.

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.

Introduction

In the Cardinal Overview, you learned that the Time & Attendance functional area contains two modules:

- **Time & Labor -** Involves employee setup, input of time and attendance, payroll integration and cost allocation
- **Absence Management -** Involves the processing and managing of employee absences



Course Objectives

After completing this course, you will be able to:

- Create and maintain position, personal, and job data
- Enroll and maintain Time Reporters
- Manage work schedules
- Manage and update time after payroll processing
- Describe key reports, queries and online inquiries

Agenda

In this course, we will cover the following lessons:

- Lesson 1: Understanding Time & Attendance
- Lesson 2: Creating and Maintaining Position, Personal, and Job Data
- Lesson 3: Enrolling and Maintaining Time Reporters
- Lesson 4: Managing Work Schedules
- Lesson 5: Reports, Queries and Online Inquiries
- Lesson 6: Time & Attendance Administration Hands-On Practice
- Lesson 7: Managing and Updating Time After Payroll Processing

Lesson 1: Understanding Time & Attendance

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

- Key Concepts
- Process
- Integration and Interfaces

Key Concepts

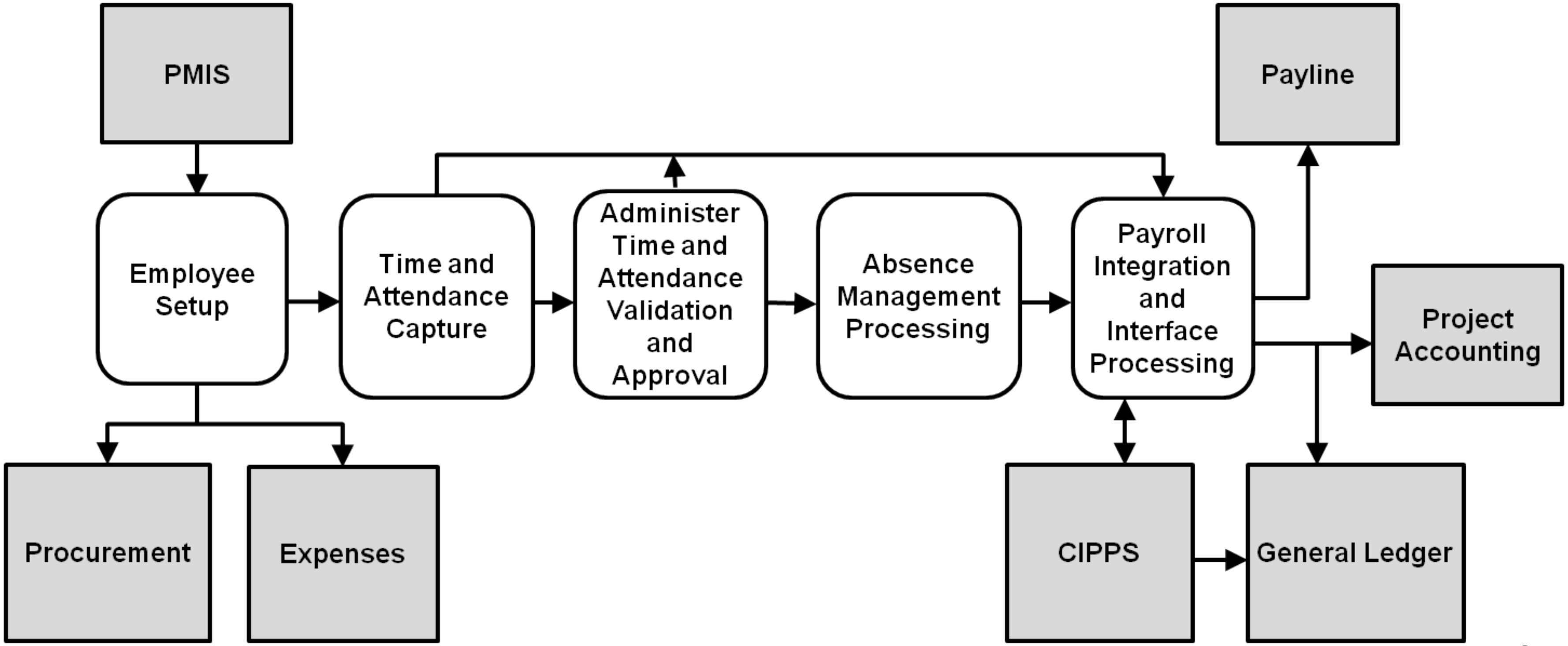
Key concepts in Time & Attendance Administration include:

- Cardinal displays time and absences using a weekly calendar format.
- SpeedTypes can be used to auto populate some ChartField values.
- Absence requests are available for approval immediately after submission.
- Absence requests for accrued absence types (e.g., vacation, sick) must be forecasted to determine absence availability.
- Cardinal captures and tracks contract hours, contract start date, and contract end date for hourly employees.
- The Time Administration process creates exceptions (warnings or errors) for time entered that does not meet defined business rules.
- Productive time is not routed for approval until it has been submitted and successfully processed through Time Administration.
- Employees and Timekeepers can enter and adjust both absences and productive time back to the beginning of the current fiscal year.
- In Employee Self Service the employee enters time, selects a TRC, and enters charge distribution codes. Once time is entered and saved, the employee submits their time for processing. The Time Administration process then validates time reported and routes it for approval.

Time & Attendance Process Flow

The Time & Attendance functional area includes five processes:

- Employee Setup
- Time & Attendance Capture
- Administer Time & Attendance Validation and Approval
- Absence Management Processing
- Payroll Integration and Interface Processing



Time & Attendance Process Flow (continued)

Employee Setup - Most position, personal, and employee data is loaded into Cardinal from PMIS daily. If the data is incorrect, it must be corrected in PMIS so it can be updated in Cardinal. Otherwise, PMIS re-loads the incorrect data during the next daily interface.

Time and Attendance Capture - There are two ways to capture time:

- Employee Self Service
- Manager Self Service

In Employee Self Service you enter your own time and Absence Requests. In Manager Self Service, your supervisor or Timekeeper enters time and Absence Requests for employees. Once time is entered, saved, and submitted, the Time Administration process validates it and routes payable time to the employee's supervisor for approval.

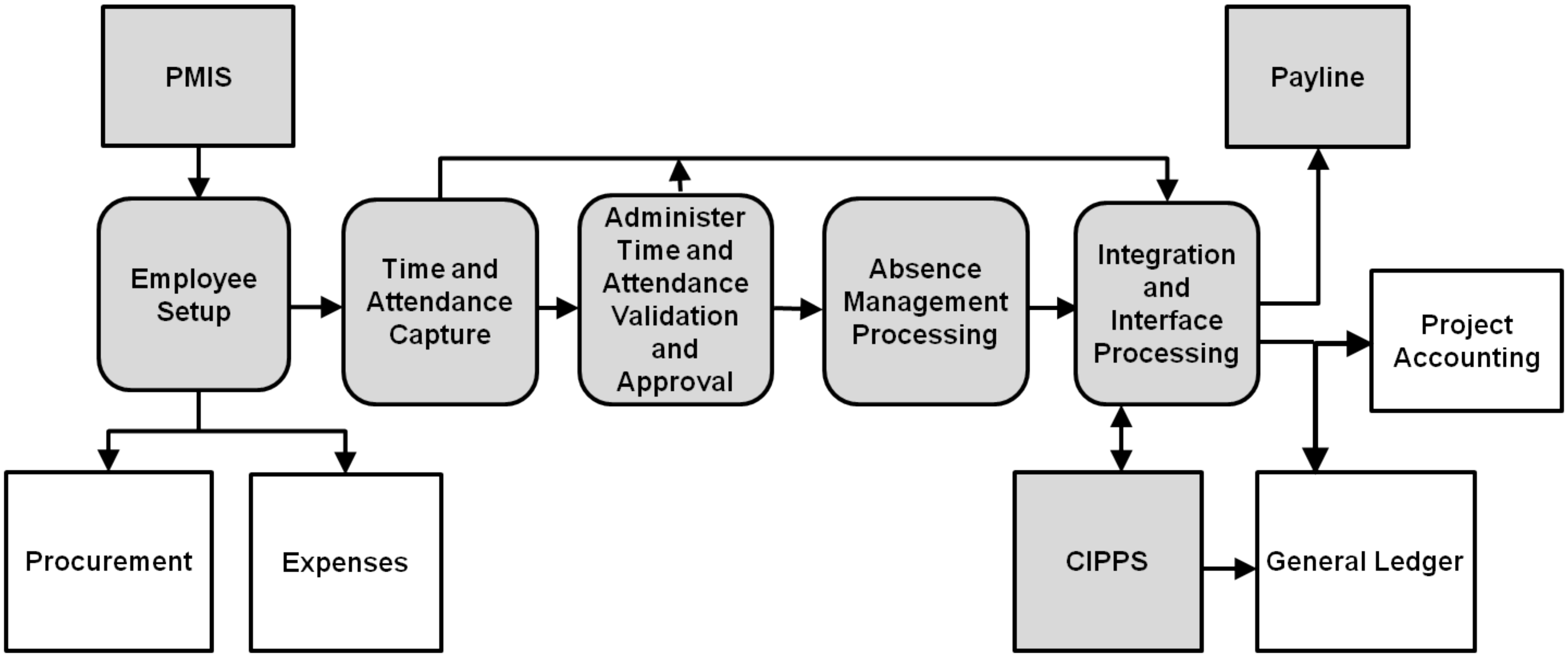
Administer Time and Attendance Validation and Approval - Regardless of the method of entry (e.g., Self Service, Timekeeper) once time is submitted, it runs through the Time Administration process. Time Administration validates all submitted time against time reporting rules and generates payable time. It also identifies any errors related to the time reporting rules and generates exceptions.

Absence Management Processing - The employee and Timekeeper enter most absences on the **Timesheet** page. Cardinal requires forecasting for entitlement absences (e.g. VAC, SCK) and then routes absence requests immediately to the employee's supervisor for approval. Approved absences are posted on the employee's timesheet.

Integration

Time & Attendance supports Accounts Payable's employee Travel and business Expenses module and Procurement's Purchasing module.

Cardinal uses time and charge distribution information from employee timesheets to allocate payroll costs according to the distributions entered on timesheets. That allocated labor cost is shared with and posts to the General Ledger. Those labor costs associated with projects also are sent to Project Accounting and used to bill participating projects.

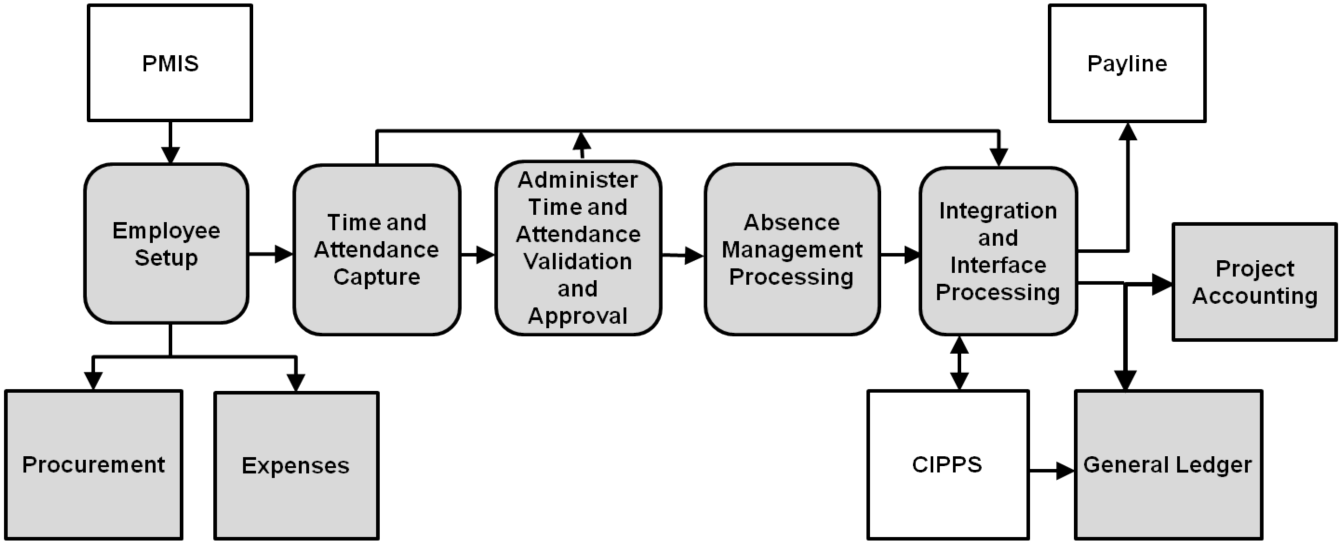


Interfaces

Time and Attendance also interacts with external systems. The PMIS interface uploads most position, personal, and job (employee) data into Cardinal. That interface updates Cardinal data, and overwrites any updates you key directly into Cardinal. Make sure that personal, position and job data updates are keyed directly in PMIS timely, so that interfaced data is correct.

Cardinal transmits earnings data to CIPPS. That earnings data includes overtime hours and rates for salaried employees and regular and overtime hours and rates for hourly employees. Once the payroll is processed, CIPPS provides Expanded Current Earnings data back to Cardinal. Cardinal uses this data along with the time and charge distribution information from employee timesheets to allocate payroll.

At the end of each semi-monthly pay cycle, Cardinal transmits salaried employees' absence and leave information to the Department of Accounts – Payline.



Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material.

True or False?

1. Hourly employees have a work schedule of zero hours.
2. Every employee must be setup as a time reporter.
3. Every employee must be assigned a schedule in Cardinal.
4. Employee data is uploaded from CARS into Cardinal.
5. Time & Attendance integrates Accounts Payable and Accounts Receivable.

Lesson 1: Summary

In this lesson, you learned:

- The PMIS inbound interface drives most of the position, personal, and job data in Cardinal. There is some data that must be added or updated manually (e.g., Reports To, Work Schedule, Time Reporter)

- Every employee has a work schedule in Cardinal.

- Time & Attendance shares some employee information with Accounts Payable's Expenses module and with the Purchasing module to support employee travel and business expense reimbursement processing and Small PCard Program use.

- Employee labor costs are posted in General Ledger when employee pay is distributed according to the time and charge distribution information on employee timesheets. Any labor costs associated with projects are also sent to Project Accounting.

Remaining Lessons 2 - 4: Maintaining Position and Job Data

In the remaining lessons, you will learn about the following topics:

- Maintaining Position and Job Data in Cardinal that is not entered in PMIS and not interfaced to Cardinal
    - Lesson 2: Maintaining Position Data: Reports To Position
    - Lesson 3: Maintaining Job Data: Time Reporter, Hourly Contract, Comp & Overtime Leave Plan
    - Lesson 4: Maintaining Job Data: Work Schedules
- You will also see Cardinal pages throughout the training material that are provided for information purposes only. They are not pages that you will need to enter data.

Remaining Lessons 2 - 4: Maintaining Position and Job Data (continued)

Most Personnel, Position, and Job (Employee) information is entered into PMIS and then uploaded into Cardinal. However, there is position and job data that is not captured in PMIS but is required for Cardinal operations. That data must be manually entered into Cardinal after the interface occurs for an employee or a position.

The PMIS interface drives personnel, position, and job setup in Cardinal. That interface includes data that has changed due to many different scenarios such as:

- new hire
- termination
- switching pay groups from salaried to hourly (or vice versa)
- death
- change in position

The following are the types of Cardinal manual updates potentially required after the PMIS interface for each different scenario:

- new hire ➔ Reports To, Time Reporter, Work Schedule, Comp & Overtime Leave Plan, Hourly Contract data
- termination ➔ Reports To, Time Reporter, Work Schedule, Comp & Overtime Leave Plan, Hourly Contract data
- switching pay groups from salaried to hourly (or vice versa) ➔ Reports To, Time Reporter, Work Schedule, Comp & Overtime Leave Plan, Hourly Contract data
- death ➔ Reports To, Time Reporter, Work Schedule, Comp & Overtime Leave Plan, Hourly Contract data
- change in position ➔ Reports To

Lesson 2: Maintaining Position Data - Reports To Position

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

- Maintaining Position Data
  - Reports To

Review and Enter Position Data – Reports To

Relationship of Job Data to Position Data: From a users perspective position data and job data are largely in the same mix and they are closely related. Position data is part of Job data. Position data focuses more on position description information while Job data has a broader focus on compensation, benefits, work schedule, time reporter task and workgroups. The link between personal data and job data establishes the Organizational Relationship in Cardinal.

Cardinal uses the **Position Number** to track information at the position level. A Person can be entered into Cardinal. However, that Person is not associated with a Position. When a Person is associated with a Position, an Organizational Relationship can be established and the Person becomes an Employee with a Position. Every Employee must have a Position Number in Cardinal.

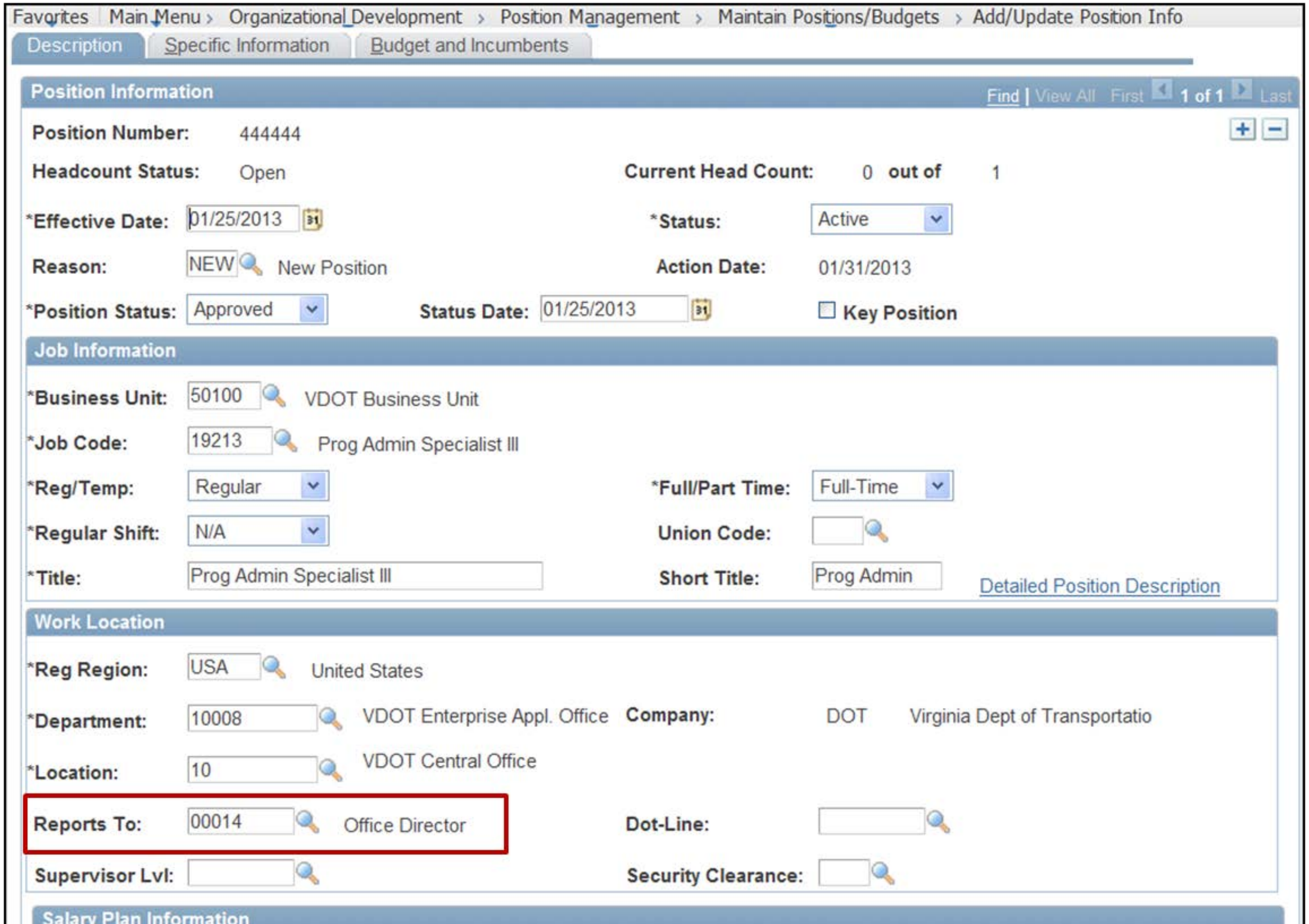
Most position data is entered in PMIS and then interfaced into Cardinal. However, the **Reports To** field information does not exist in PMIS so you must enter it manually. You can not enter the Reports To Position Number until the Position is created in Cardinal. Concurrent with that task for new hires is the manual entry of Time Reporter data, assignment of a work schedule for every new employee, and selection of Comp and Overtime Leave plans.

Reports To defines the reporting relationship for the position by identifying its related supervisory position number. Go to the **Description** page to enter a position's Reports To.

You can navigate to this page using the following path:

Cardinal HCM > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info.

Review and Enter Position Data – Reports To (continued)



Review and Enter Job (Employee) Data

PMIS sends Job (Employee) Data to Cardinal daily. You should review an employee's Personal and Job Data for accuracy. If the data is incorrect, you must research and ensure that PMIS data is corrected and that the corrected data is subsequently loaded into Cardinal.

When there are retroactive changes in PMIS, they may result in other adjustments:

- If there are retroactive changes to an employee's anniversary date in PMIS, you will need to contact the Absence Management Administrators, as the employee's absence balance may need to be adjusted.
- The PMIS interface updates Cardinal's company seniority date. This date is used to determine years of service for some accruals (VAC, SCK, etc.) and the VAC carryover maximum.
- Since the seniority date field is not effective dated, retro absence calculations are not triggered.
- The seniority date is used in absence calculations starting with the pay period when the new date was received in Cardinal.
- The Absence Management Administrator needs to manually adjust the absence balances to account for any incorrect accruals prior to that period.

Review Job (Employee) Data

Once the position exists in Cardinal, you can fill that position by adding an employee.

You navigate to this page using the following path:

Cardinal HCM > Main Menu > Workforce Administration > Job Information > Job Data

Cardinal requires that you create a relationship between a position and the employee by navigating to the **Add a Person** page. Select the **Organizational Relationship** tab and click on the **Add a Relationship** button.

If the employee is an hourly employee, you can then enter information related to the contract start date, end date and hours limitations through the **Maintain Time Reporter Data** page. Hourly contract data is addressed in Lesson 3.

Once the position and job (employee) data are in Cardinal and you have linked the employee to a position, an Employee Setup Administrator can set up the employee as a Time Reporter and assign a work schedule in Cardinal. Time Reporter is addressed in Lesson 3 and work schedule will be addressed in lesson 4.

You navigate to this page using the following path:

Cardinal HCM > Main Menu > Workforce Administration > Job Information > Job Data

Biographical Details – Add Name

The following set of nine (9) Cardinal screen shots are provided for informational purposes only. They are not pages that you typically will need to access to update. However, they do contain information that may be helpful to you in understanding the Position, Personal, and Job data provided by PMIS to Cardinal via interface as well as the data required by Cardinal that is not available in PMIS.

Also, in the rare occasion in which you may have to add an Employee or a Position, these are most of the pages that you need to get started. Cardinal has job aids designed to walk you thru the entire process.

The screen shots largely follow the progression of:

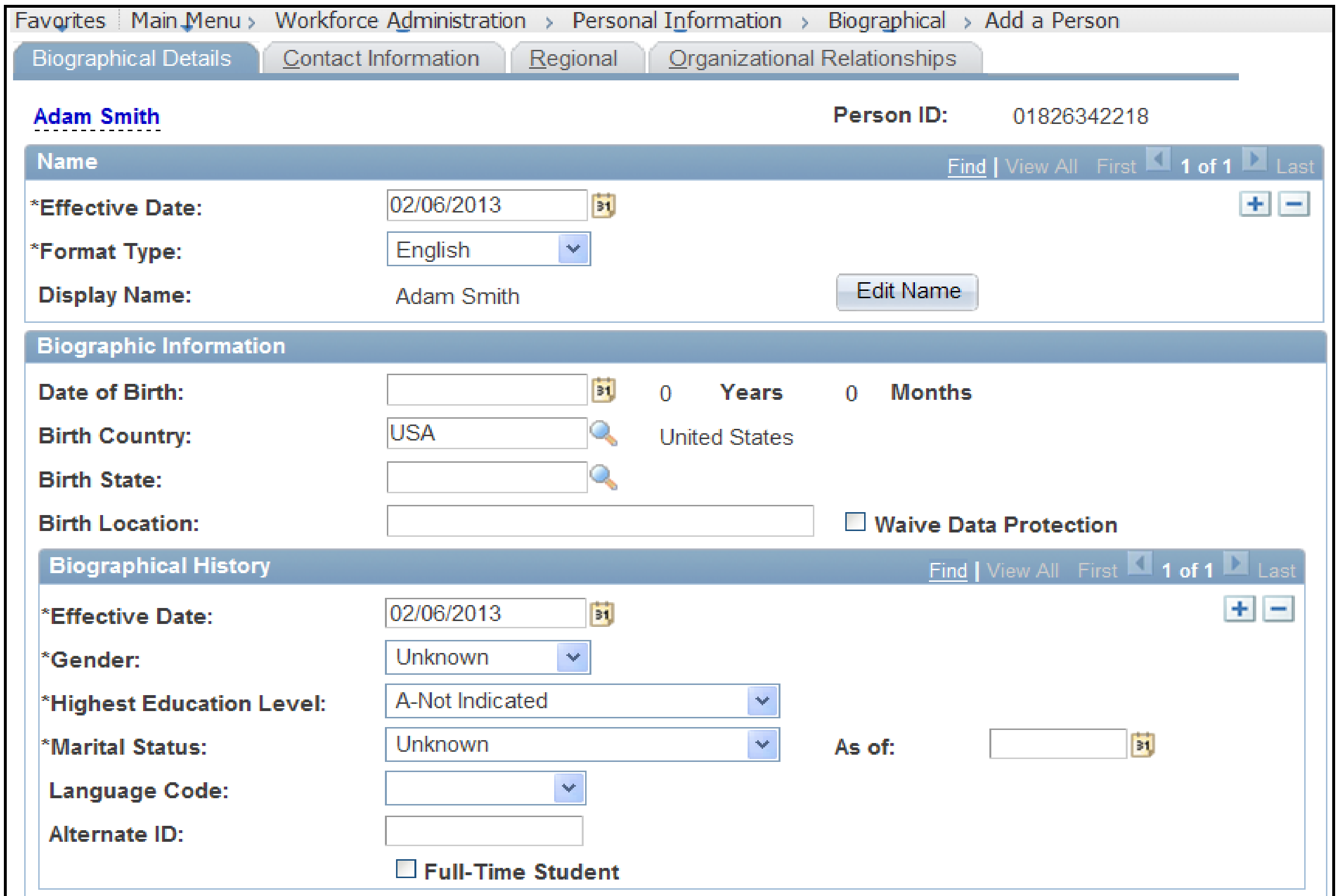
- Add a Position
- Add a Person which transitions to an Employee assigned to a Position

This set of screen shots are identified by the following statement:

> This screen shot is for informational purposes only. It is not a page that you typically will need to access to update.

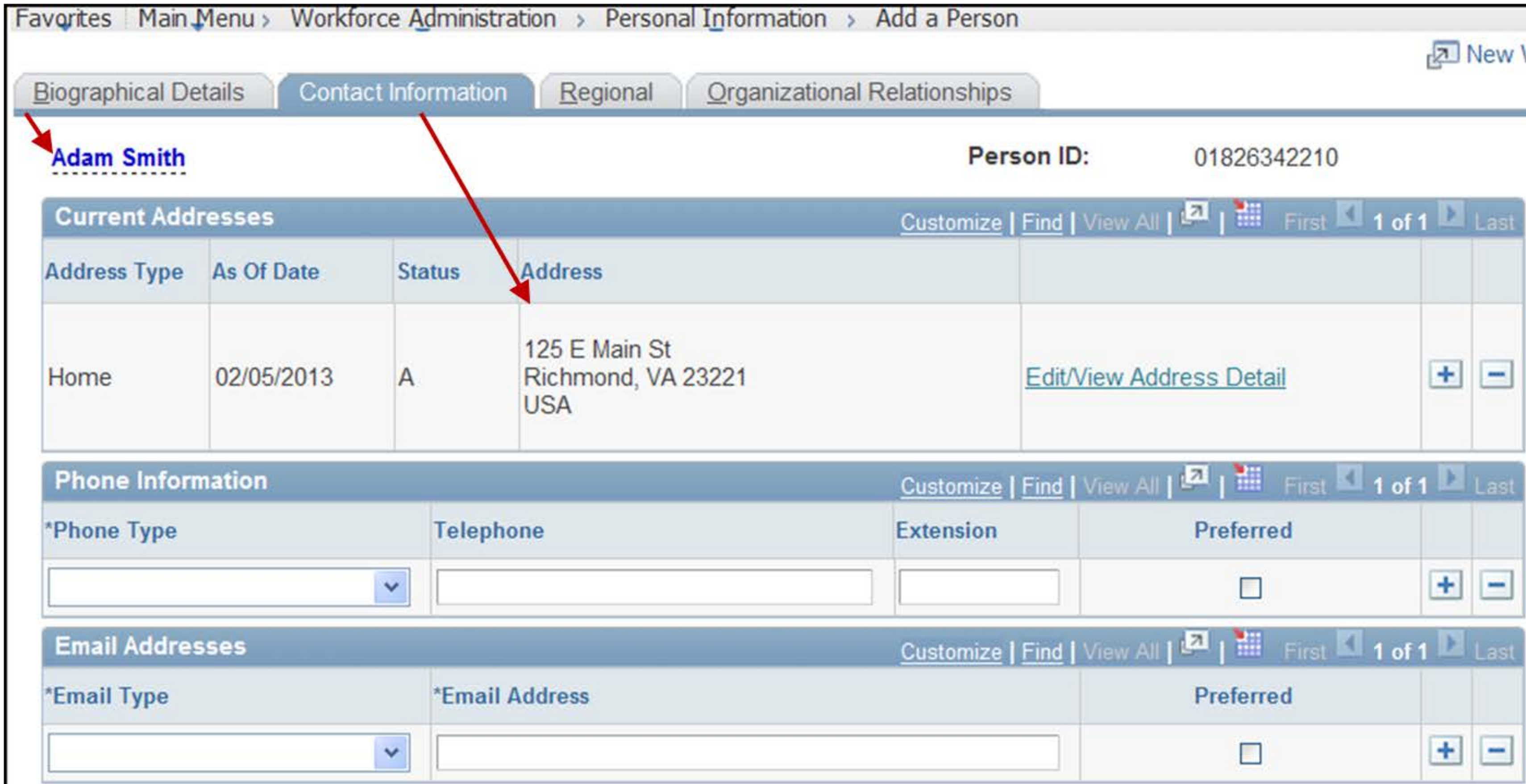
Biographical Details – Add Name (continued)

This screen shot is for informational purposes only. It is not a page that you typically will need to access.



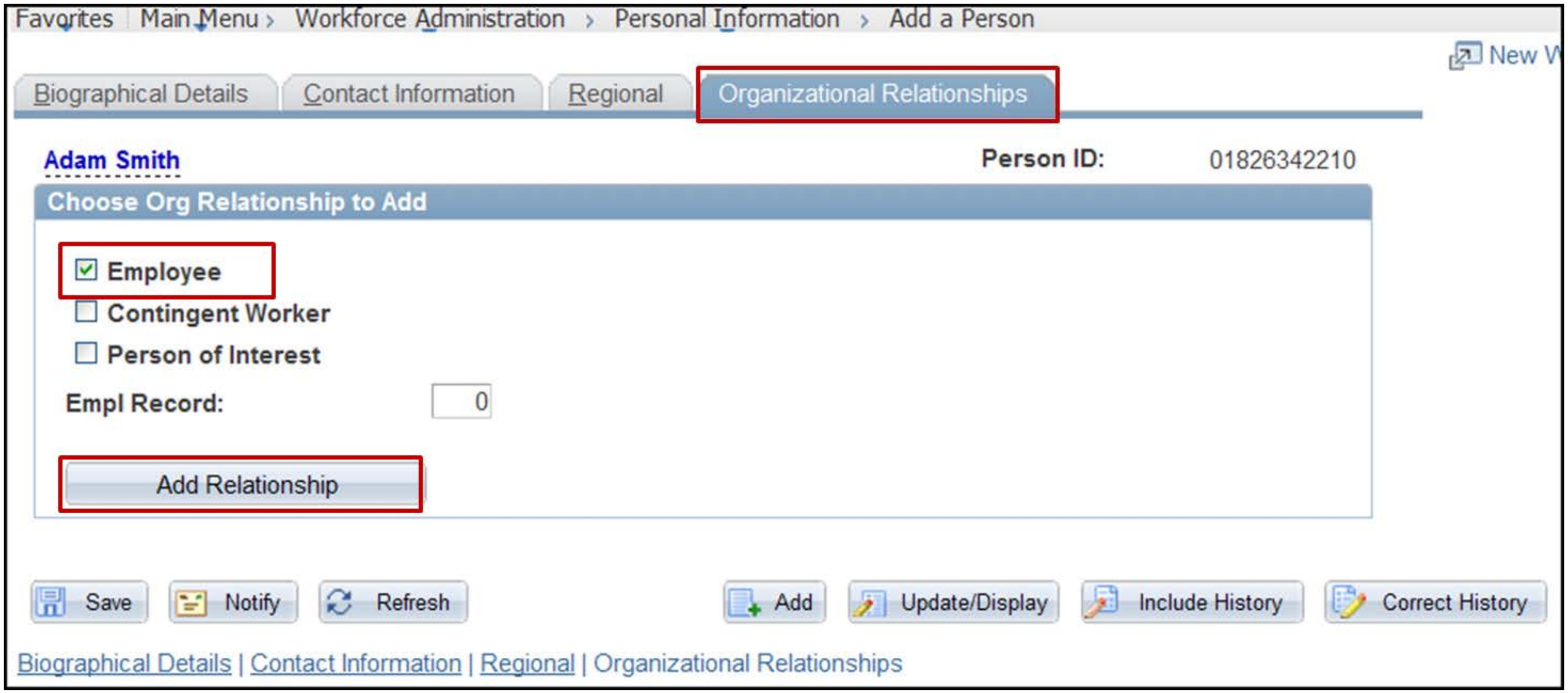
Contact Information - Address

This screen shot is for informational purposes only. It is not a page that you typically will need to access.



Organizational Relationship

This screen shot is for informational purposes only. It is not a page that you typically will need to access.



Job Data - Work Location

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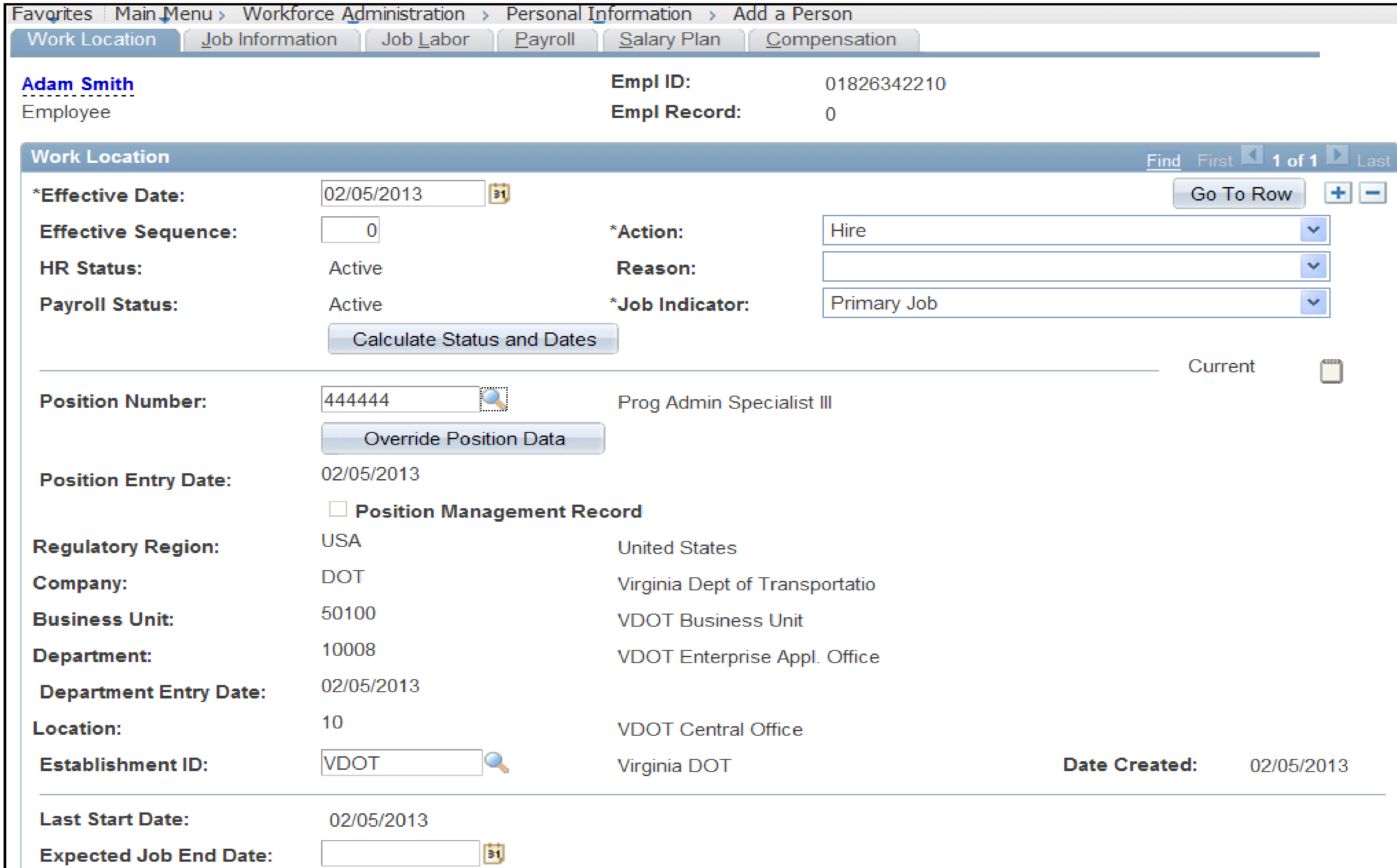

Job Data - Job Information (Reports To)

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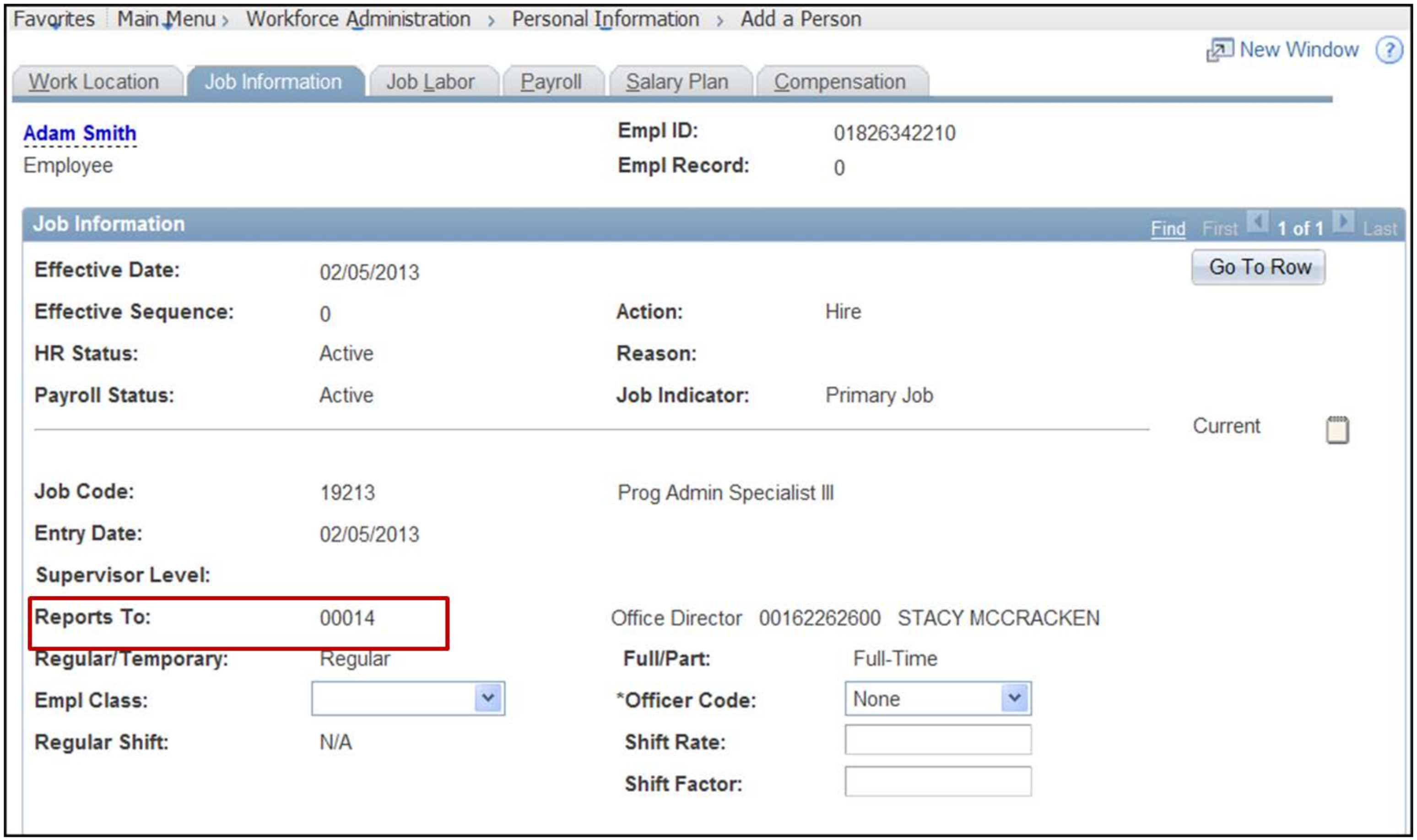

Job Data – Payroll

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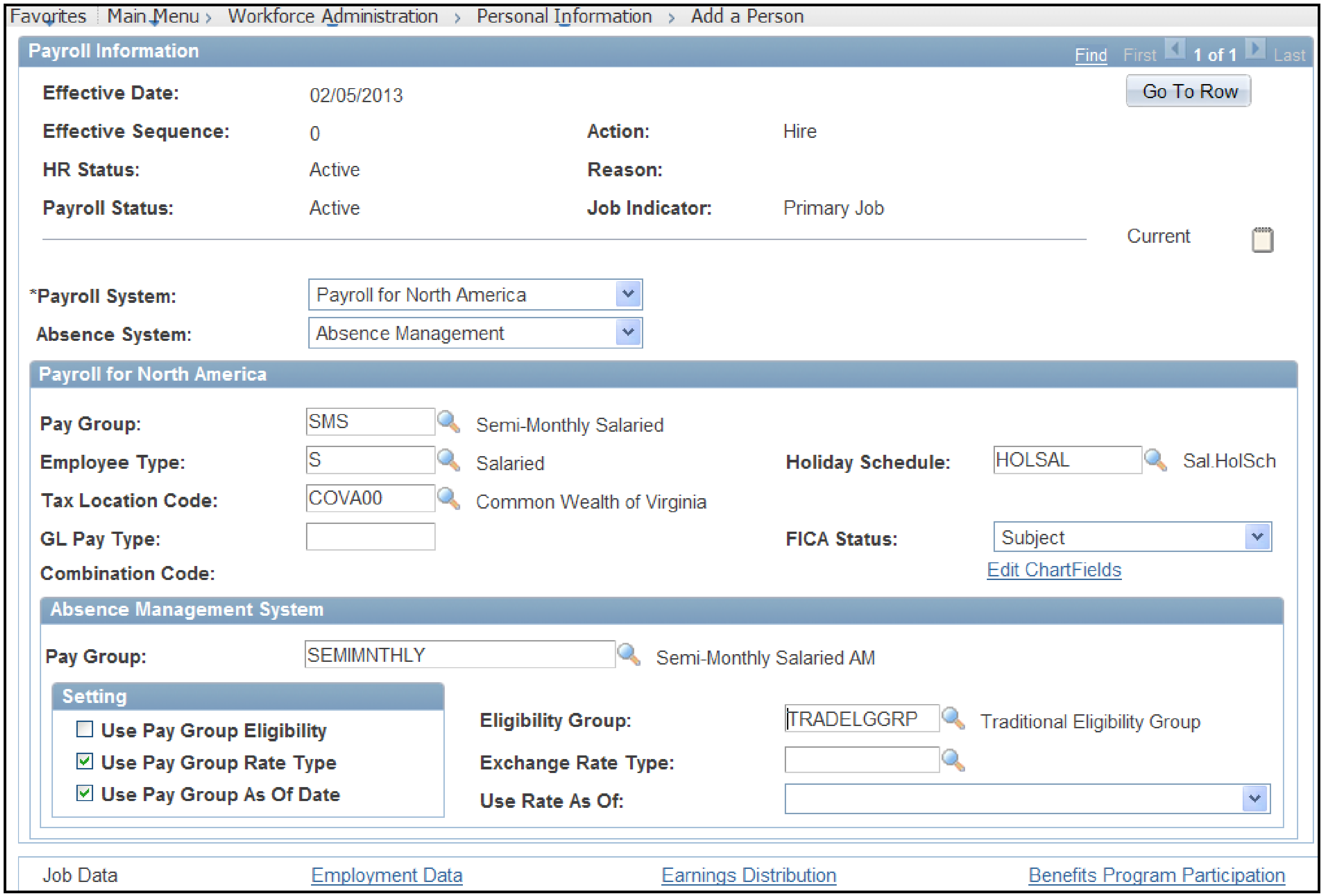


Favorites | Main Menu › Workforce Administration › Personal Information › Add a Person

Payroll Information Find First 1 of 1 Last

Go To Row

Effective Date: 02/05/2013

Effective Sequence: 0 **Action:** Hire

HR Status: Active **Reason:**

Payroll Status: Active **Job Indicator:** Primary Job

Current

***Payroll System:** Payroll for North America

Absence System: Absence Management

Payroll for North America

Pay Group: SMS Semi-Monthly Salaried

Employee Type: S Salaried **Holiday Schedule:** HOLSAL Sal.HolSch

Tax Location Code: COVA00 Common Wealth of Virginia

GL Pay Type: **FICA Status:** Subject

Combination Code: Edit ChartFields

Absence Management System

Pay Group: SEMIMNTHLY Semi-Monthly Salaried AM

Setting

- [ ] **Use Pay Group Eligibility**
- [x] **Use Pay Group Rate Type**
- [x] **Use Pay Group As Of Date**

Eligibility Group: TRADELGGRP Traditional Eligibility Group

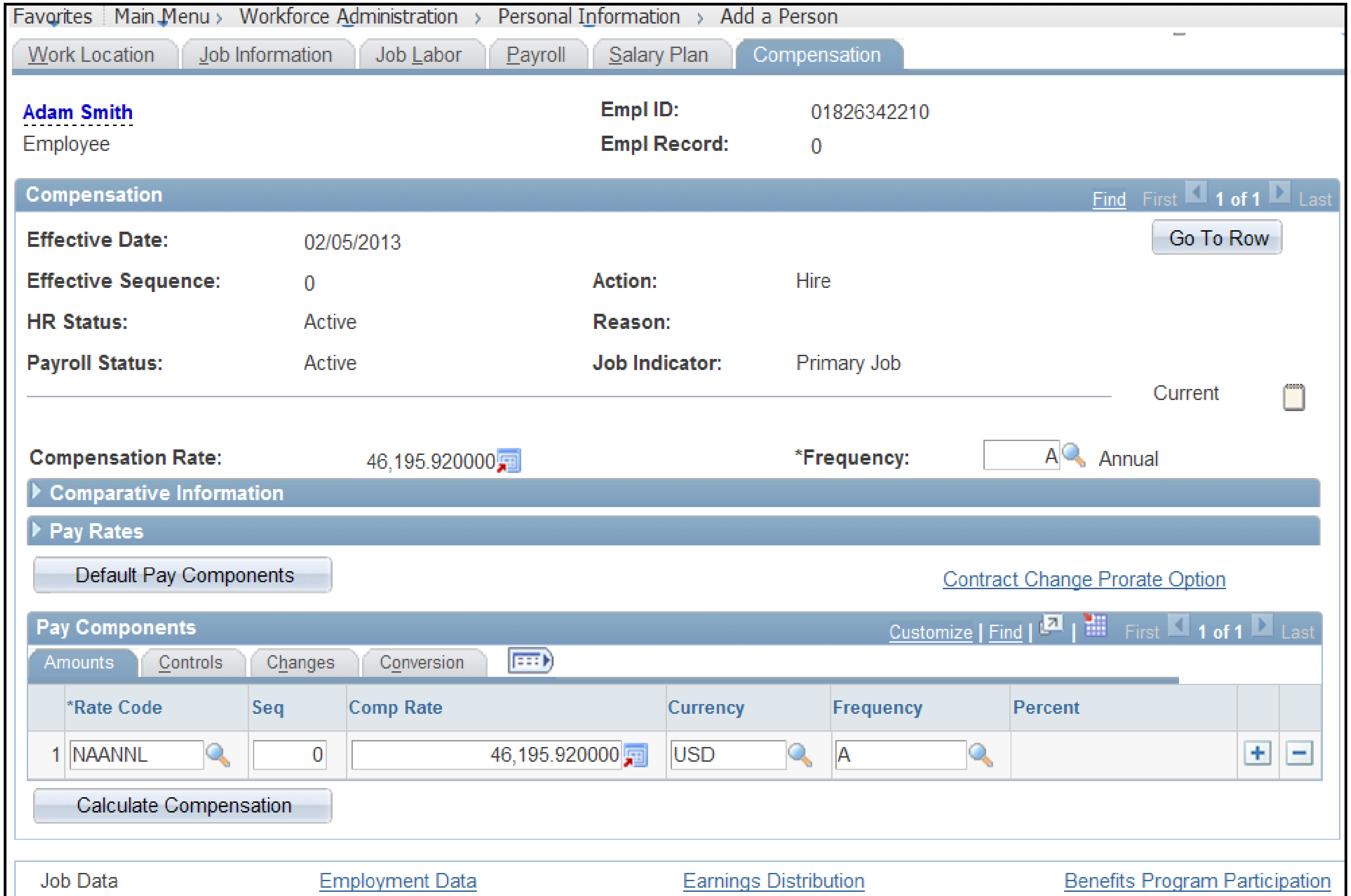
Exchange Rate Type:

Use Rate As Of:

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Job Data – Compensation

This screen shot is for informational purposes only. It is not a page that you typically will need to access.



Favorites | Main Menu › Workforce Administration › Personal Information › Add a Person

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Adam Smith
Employee

Empl ID: 01826342210
Empl Record: 0

Compensation Find First 1 of 1 Last

Effective Date: 02/05/2013 Go To Row

Effective Sequence: 0 **Action:** Hire

HR Status: Active **Reason:**

Payroll Status: Active **Job Indicator:** Primary Job

Current

Compensation Rate: 46,195.920000 ***Frequency:** A Annual

Comparative Information

Pay Rates

Default Pay Components | Contract Change Prorate Option

Pay Components Customize | Find | First 1 of 1 Last

Amounts | Controls | Changes | Conversion

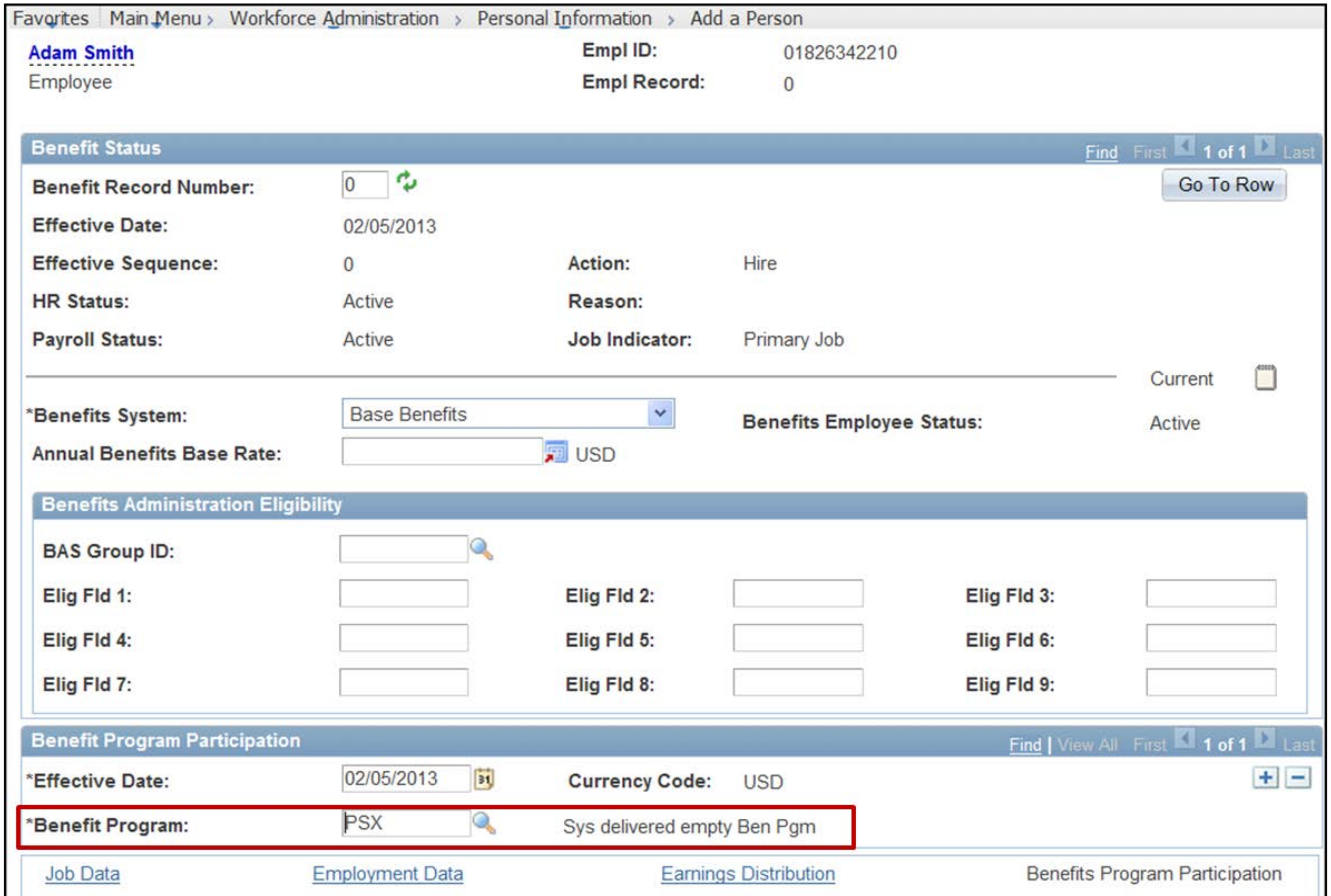
	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1	NAANNL	0	46,195.920000	USD	A	

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Job Data – Benefit Program

This screen shot is for informational purposes only. It is not a page that you typically will need to access.


Favorites | Main Menu › Workforce Administration › Personal Information › Add a Person

Adam Smith
Employee

Empl ID: 01826342210
Empl Record: 0

Benefit Status — Find | First 1 of 1 Last

Benefit Record Number: 0 — Go To Row
Effective Date: 02/05/2013
Effective Sequence: 0 — Action: Hire
HR Status: Active — Reason:
Payroll Status: Active — Job Indicator: Primary Job
Current
*Benefits System: Base Benefits — Benefits Employee Status: Active
Annual Benefits Base Rate: USD

Benefits Administration Eligibility

BAS Group ID:
Elig Fld 1: — Elig Fld 2: — Elig Fld 3:
Elig Fld 4: — Elig Fld 5: — Elig Fld 6:
Elig Fld 7: — Elig Fld 8: — Elig Fld 9:

Benefit Program Participation — Find | View All First 1 of 1 Last

*Effective Date: 02/05/2013 — Currency Code: USD
*Benefit Program: PSX — Sys delivered empty Ben Pgm

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Job Data – Benefit Program (continued)

This screen shot is for informational purposes only. It is not a page that you typically will need to access.

Favorites | Main Menu › Workforce Administration › Job Information › Add Employment Instance

New Window | He

Employment Information

Adam Smith		Empl ID:	01826342210
Employee		Empl Record:	1

Organizational Instance

Organizational Instance Rcd:	1	Original Start Date:					Override
Last Start Date:		First Start Date:					
Termination Date:				Years	Months	Days	
Org Instance Service Date:		Override		0	0	0	

Organizational Assignment Data

Instance Record

Last Assignment Start Date:	02/08/2013	First Assignment Start:		02/08/2013			
Assignment End Date:							
Home/Host Classification:	Home			Years	Months	Days	Time Reporter Data
Company Seniority Date:		Override		0	0	0	
Benefits Service Date:		Override		0	0	0	
Seniority Pay Calc Date:		Override		0	0	0	
Probation Date:							
Professional Experience Date:		Last Verification Date:					
Business Title:		Position Phone:					

USA

Lesson Simulation

You are now about to view a simulation on Creating and Maintaining Position, Personal, and Job Data.

Lesson 2: Summary

In this lesson, you learned:

- Generally, position, personal, and job (employee) data are entered into PMIS and then uploaded into Cardinal.
- Cardinal contains employee personal biographical data such as name and address. Cardinal does not include information such as marital status, gender, and social security number.
- A position must exist in Cardinal for any employee you add.
- If position, personal, and job (employee) data are manually entered into Cardinal, you must also ensure that this information is entered into PMIS. Data in PMIS and Cardinal must match. The data entry into PMIS should be done the same day.
- An employee is established in Cardinal by setting up the job (employee) data. Job data will include information regarding work location (such as Department, Location), job information (such as Reports To, FTE), Payroll (such as Payroll System, Absence System, FICA Status), and Compensation (such as Compensation Rate, Frequency).

Lesson 3: Maintain Job Data - Time Reporter, Hourly Contract, Comp & Overtime Leave Plan

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

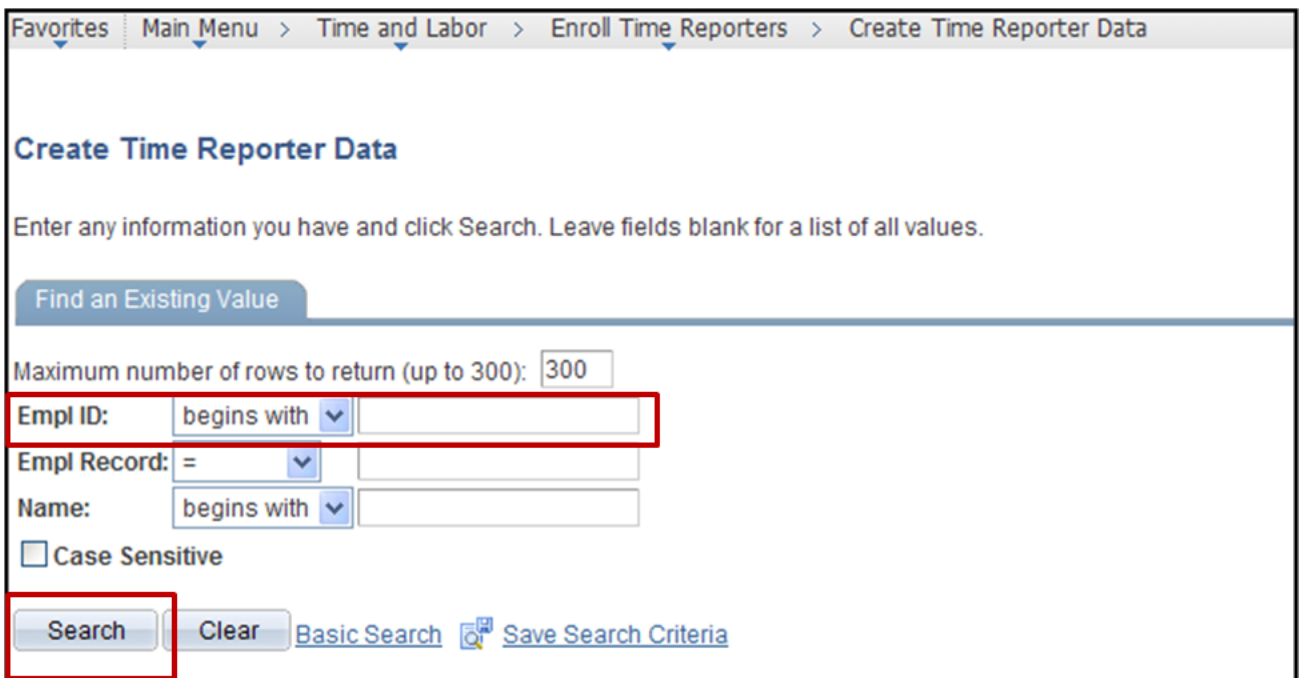
- Enrolling Time Reporters
- Maintaining Time Reporters

Enrolling Time Reporters

In order for Cardinal to record and allocate labor costs, an employee must be set up as a Time Reporter. The **Create Time Reporter Data** page is used to enroll employees as Time Reporters. You can navigate to the **Create Time Reporter Data** page using the following path:

Cardinal HCM > Main Menu > Time and Labor > Enroll Time Reporters > Create Time Reporter Data (search)

Click in the **Empl ID** field, enter the Employee ID information and then click on the **Search** button.



Employee Setup – Time Reporter

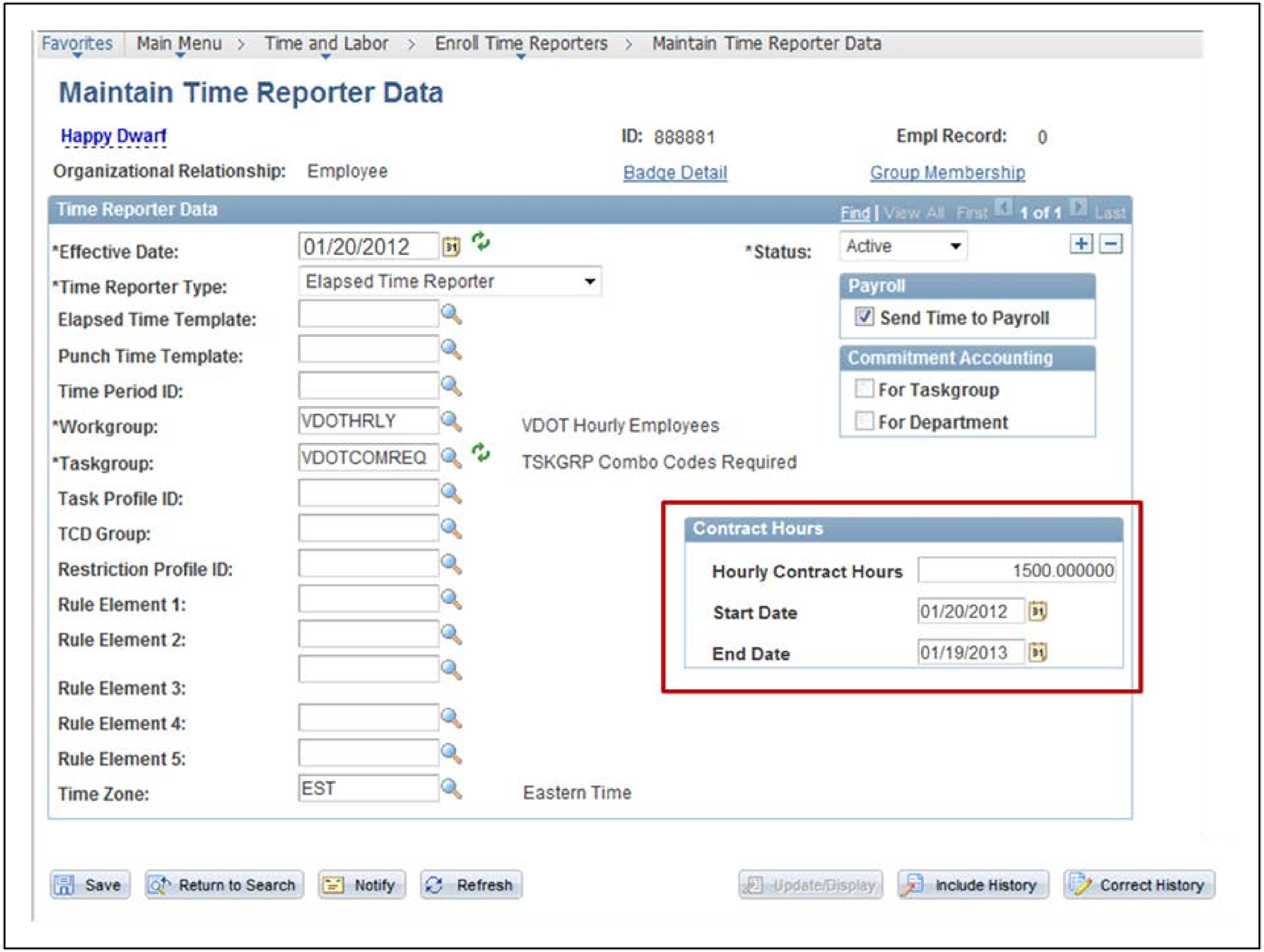
Enter information on the **Create Time Reporter Data** page:

- **Effective Date:** Enter the date the employee should begin reporting time
- **Status:** Keep the default value of **Active**
- **Time Reporter Type:** Keep the default value of **Elapsed Time Reporter**
- **Workgroup:** Select the appropriate workgroup for the employee
- **Taskgroup:** Choose the only value available, **VDOTCOMREQ**

Verify that the **Send Time to Payroll** field is checked and then click on the **Save** button.

The employee is now enrolled as a Time Reporter in Cardinal and is able to access the **Timesheet** page. Additional information needs to be entered into Cardinal to complete the employee setup which will allow the employee to actually enter time on the timesheet. This includes enrolling the employee in the compensatory leave and overtime leave plans, if applicable, and assigning the employee to a work schedule.

Employee Setup – Time Reporter (continued)



Employee Job Data Updates – All Data Updated by Payroll

Employee Job Data Updates

Employee changes may require updates to their information. Changes to employee job data can affect the Workgroup, (e.g., an hourly employee moving to a salaried position.)

Inactive Employees

If an employee becomes inactive (e.g., retirement, separation, seasonal) the Time Reporter status needs to be changed to **Inactive** when they no longer need to report time.

Inactive employees are paid for time worked prior to their status being changed. They cannot enter or be paid for time worked after the inactive effective date.

Employee Search Options – Time Reporter

To update Time Reporter Data, go to the **Maintain Time Reporter Data** page.

You can navigate to this page using the following path:

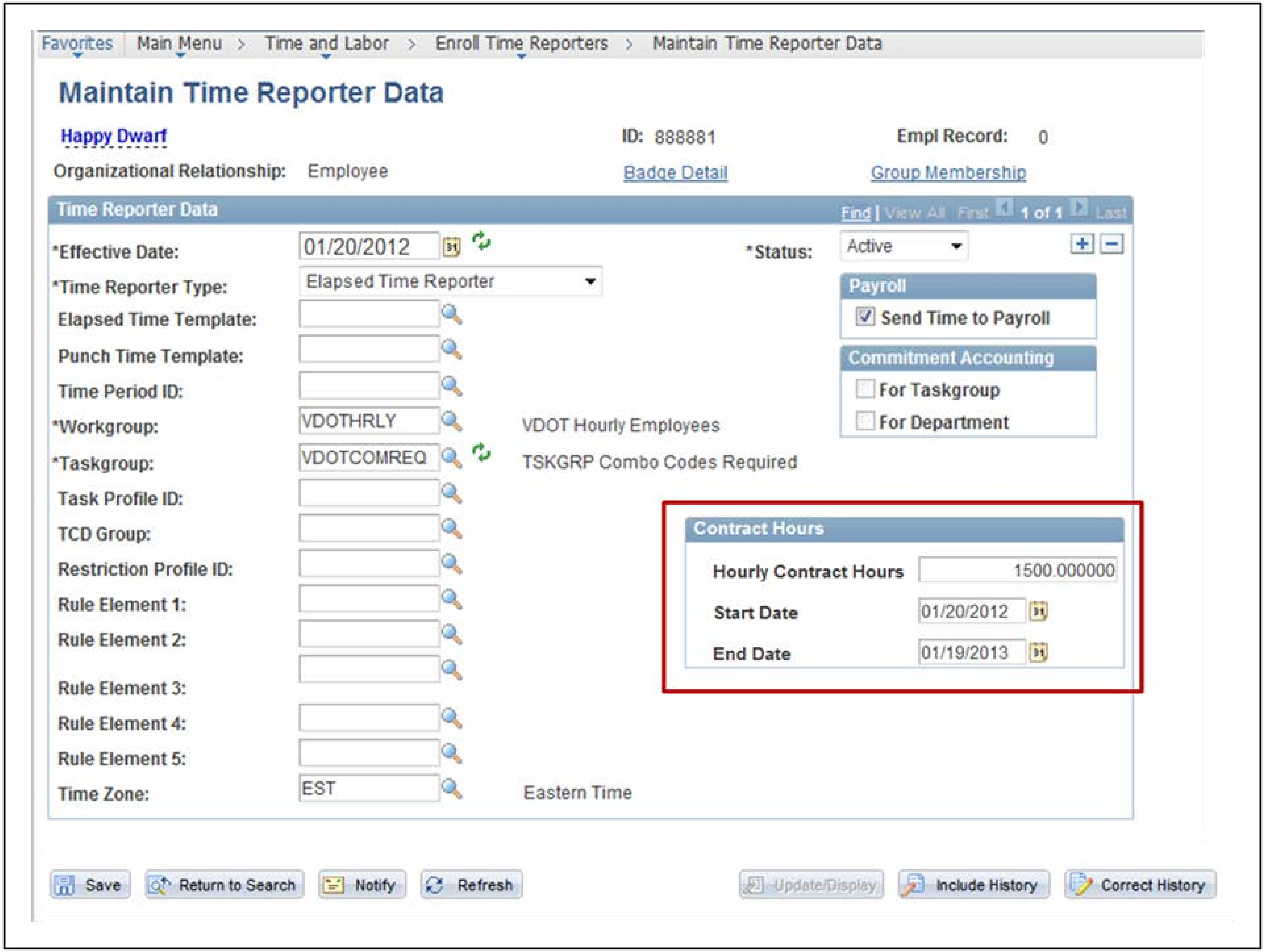
Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Maintain Time Reporter Data

Search for the employee. You can search by name, but this may yield multiple results. Using Employee ID provides a specific employee. The **Maintain Time Reporter Data** page displays once you complete your search.

The fields highlighted in red are the only ones used in Cardinal:

- **Effective Date**: This should be the effective date of the change
- **Status**: options are either **Active** or **Inactive**
- **Time Reporter Type**: Defaults to **Elapsed Time Reporter** (do not change this field)
- **Workgroup**: Select the appropriate workgroup for the employee
- **Taskgroup:** Only one – **VDOTCOMREQ**
- **Rule Element 1:** Field is used to designate if an employee pays commuter tax. If so, input COMMUTER otherwise, should be left blank.
- **Time Zone**: Defaults to EST (Eastern Time)
- **Send Time to Payroll:** Box should be checked

Employee Search Options – Time Reporter (continued)



Update Time Reporter Workgroup

To update Time Reporter Data:

- Click ‘+’ to add a new row.
- Update the **Effective Date** field.
- To update the Time Reporter’s **Workgroup**, click on the **Lookup** icon next to the **Workgroup** field and select the appropriate group.
- Enter the necessary changes and then click on the **Save** button.
- The Time Reporter Data is then successfully updated.

Update Hourly Contract Data

To update Time Reporter Data:

- Click '+' to add a new row.
- Update the **Effective Date** field.
- To update the Time Reporter's **Workgroup**, click on the **Lookup** icon next to the **Workgroup** field and select the appropriate group.
- Enter the necessary changes and then click on the **Save** button.
- The Time Reporter Data is then successfully updated.

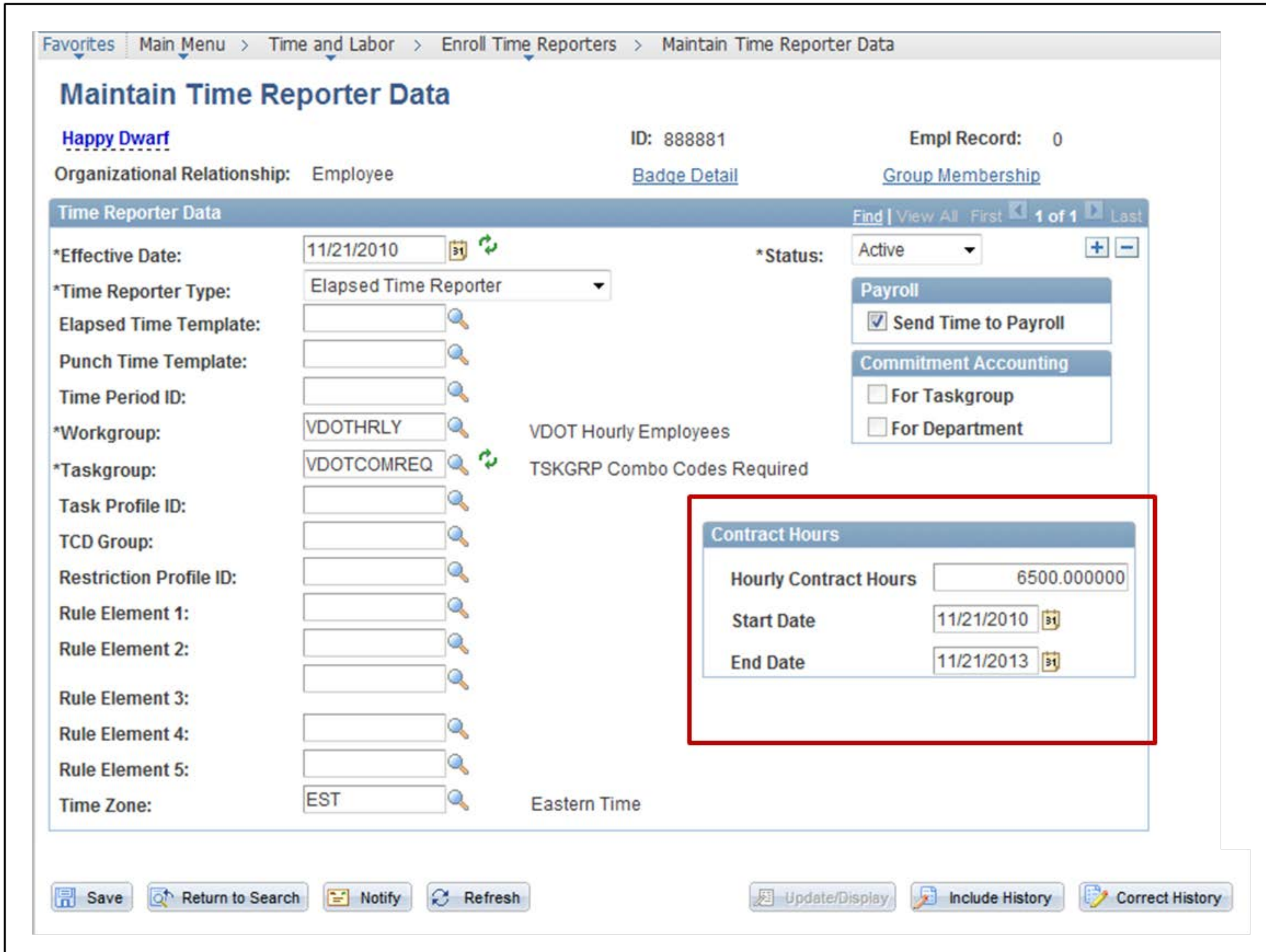
Hourly employees, have a **Contract Hours** section on their **Maintain Time Reporter Data** page.

This section includes:

- **Hourly Contract Hours** - the total number hours permitted by the employee's contract
- **Contract Start Date**
- **Contract End Date**

Enter the appropriate values in each of the required fields, and then click on the **Save** button. These fields are not updated via the PMIS interface. They are always entered and updated online.

Update Hourly Contract Data (continued)



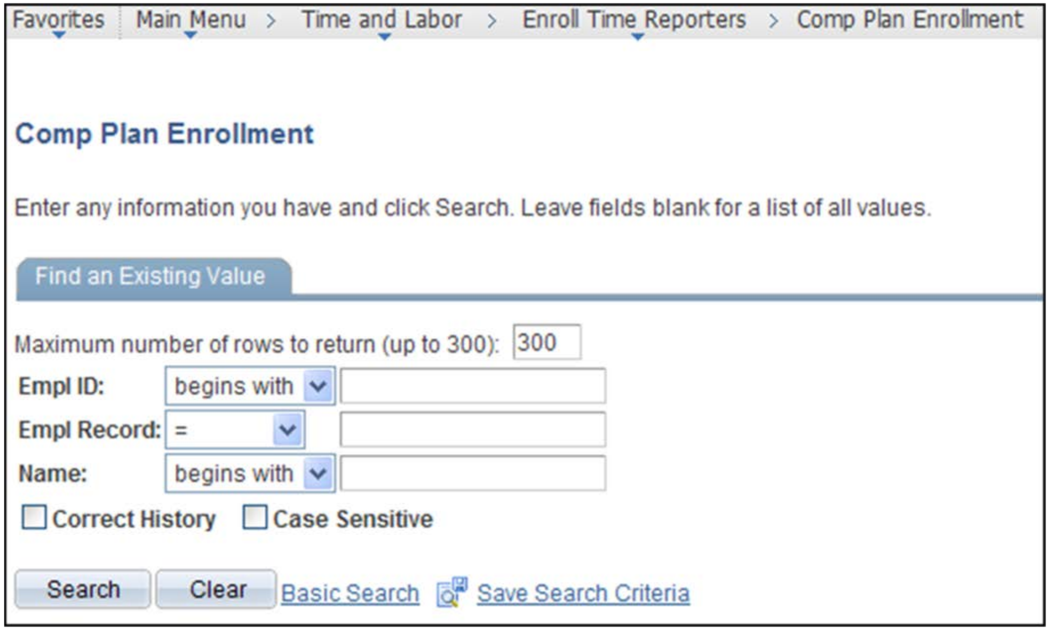
Update Compensatory Leave and Overtime Plan Data

Employees must be enrolled in the Compensatory Leave/Overtime Leave Plan in order to accrue and take the specific type of leave. Hourly employees are not eligible for compensatory or overtime leave.

We will walk through an example of enrolling an employee in the Compensatory Leave Plan. Access the **Comp Plan Enrollment** page. You can navigate to this page using the following path:

Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Comp Plan Enrollment

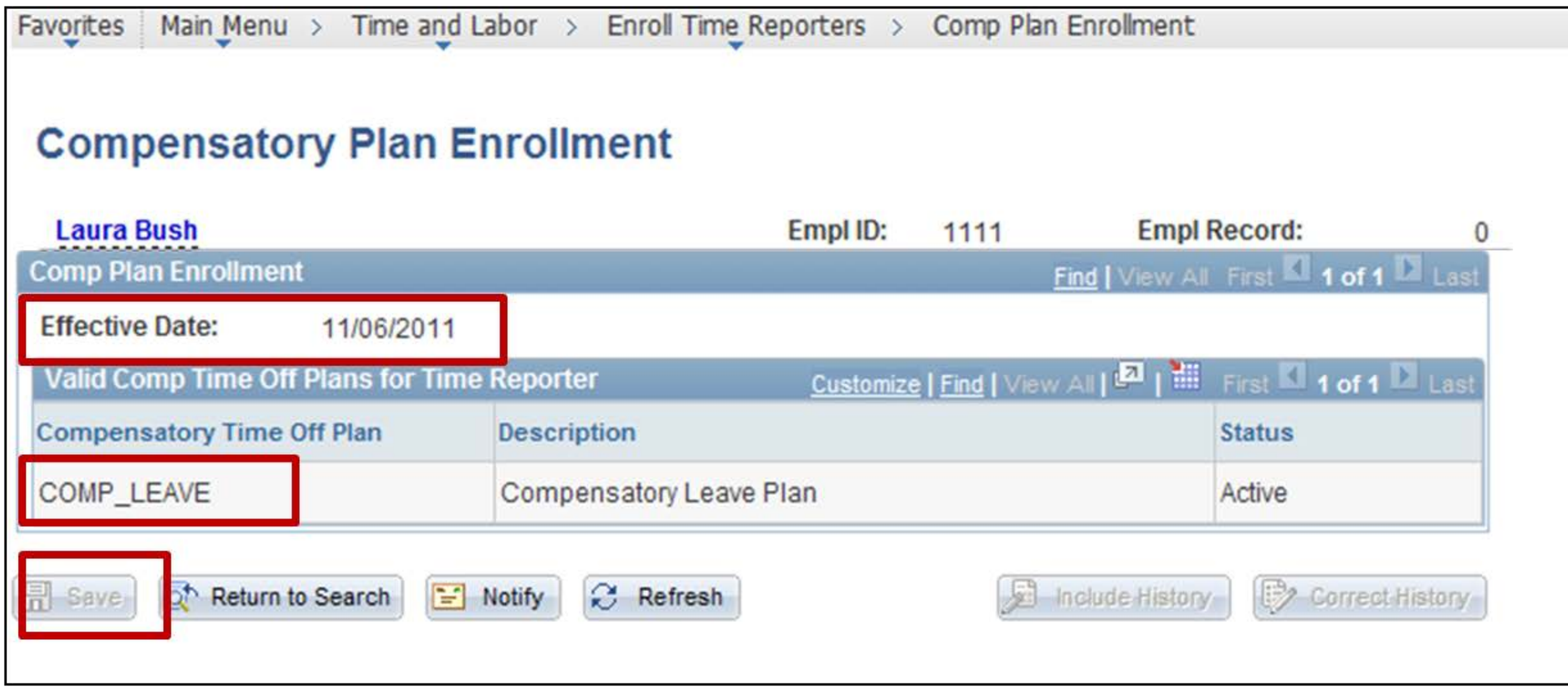
This opens the **Search** page. Enter the **Employee ID** and click the **Search** button.



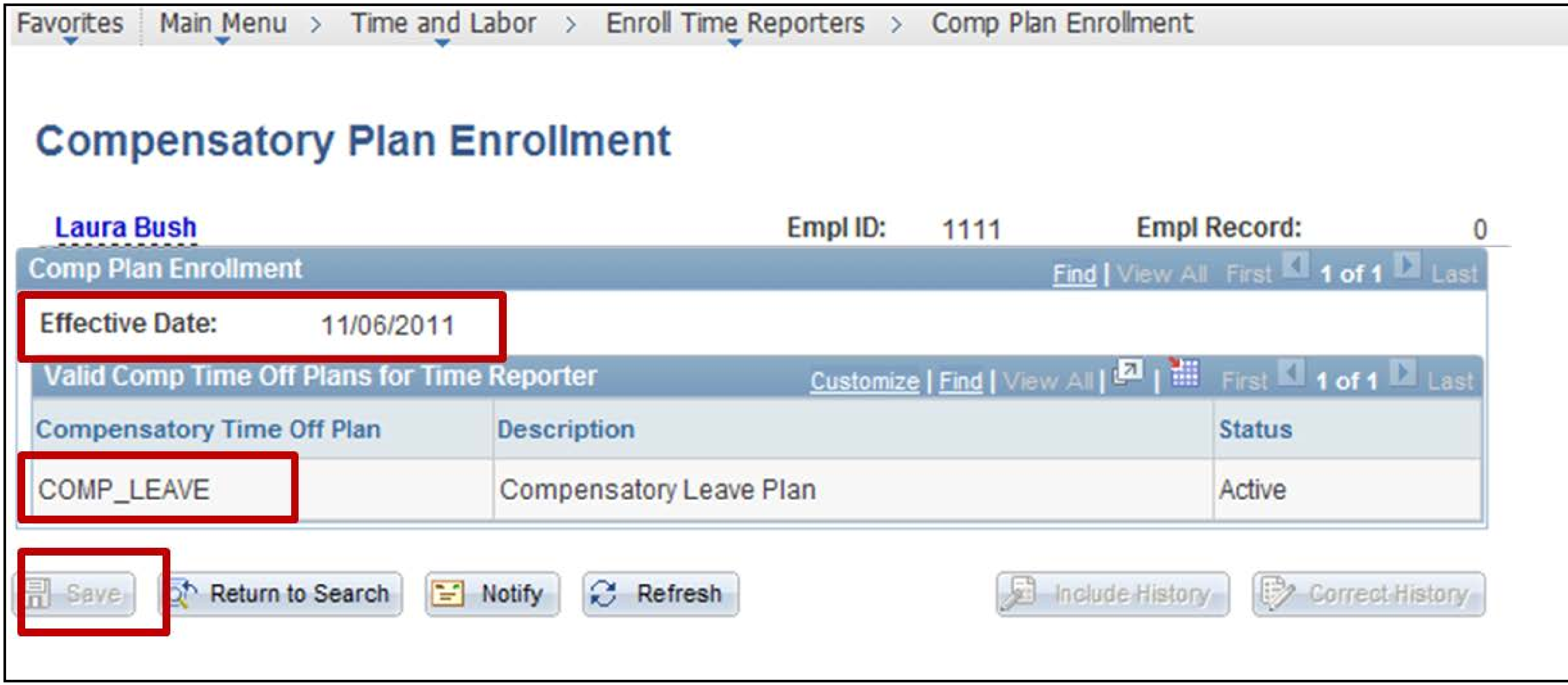
Enroll Employee into Compensatory and Overtime Leave Plans

On the **Compensatory Plan Enrollment** page:

- Enter the effective date of the employee’s enrollment.
- Select the Compensatory Time Off Plan(s) - all salaried employees qualify for compensatory leave and a small subset qualifies for overtime leave.
- Click the **Save** button.



Enroll Employee into Compensatory and Overtime Leave Plans (continued)



Lesson Simulation

You are now about to view a simulation on Enrolling Time Reporters in Cardinal.

Lesson 3: Summary

In this lesson, you learned:

- In order for Cardinal to record and allocate payroll costs, an employee must be set up as a Time Reporter. The **Create Time Reporter Data** page is used to enroll employees as Time Reporters.
- If an employee becomes inactive (e.g., retirement, separation, seasonal) the Time Reporter status is changed to **Inactive** after all time has been submitted for the employee has been processed.
- You can search for the employee by name or Employee ID. However, searching by name may yield multiple employees. Employee ID returns one employee.
- Hourly employees have a **Contract Hours** section on their **Maintaining Time Reporter Data** page.
- Employees must be enrolled in the Compensatory Leave Plan and Overtime Leave Plan in order to accrue and take those leave types.

Lesson 4: Maintaining Job Data - Work Schedules

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

- Managing Work Schedules

Ensure Employee Assigned a Work Schedule

Each employee must have a work schedule that is effective dated in Cardinal. Assigning an employee to a work schedule(s) is done manually.

Hourly employees are assigned a work schedule with zero hours. The name of the schedule is **None**.

Maintaining Work Schedule Accuracy

Manage Work Schedules

It is important that an employee’s work schedule be accurate, as it impacts the employee’s leave balances, time processing and overtime pay eligibility:

- Cardinal business rules validate hours reported on an employee’s timesheet against their schedule and identifies an exception if they do not match.
- When an absence request crosses multiple days, holidays, weekends, etc., an employee’s schedule is used to calculate how many actual leave hours are being taken.
- Cardinal uses an employee’s work schedule to determine the eligibility for any overtime entered on a timesheet.

Updating Work Schedules

When an employee’s schedule changes:

- An Employee Setup Administrator or Time & Attendance Approver can update the employee’s schedule by adding a new effective dated row.
- The schedule updates generally are entered by the employee’s supervisor.
- The employee schedule updates are effective dated to retain historical records.

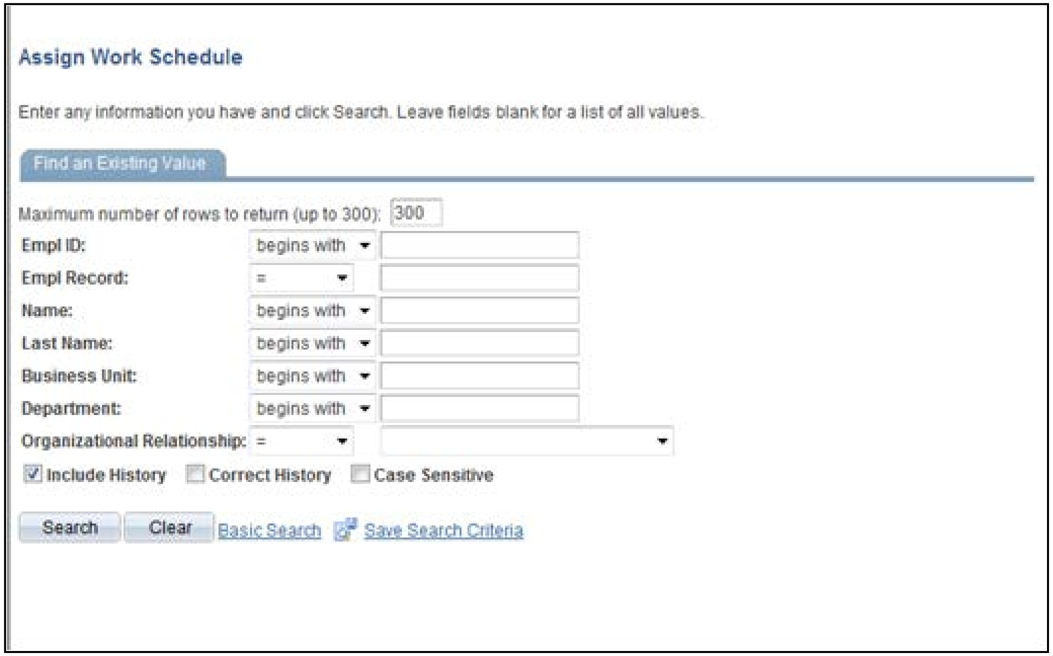
Accessing Employee Work Schedule Information

To change an employee's schedule, navigate to the **Assign Work Schedule (search)** page.

You can navigate to this page using the following path:

Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Assign Work Schedules

Enter the **Employee ID** or **Name** and then click the **Search** button. Select the appropriate employee to make the schedule change.

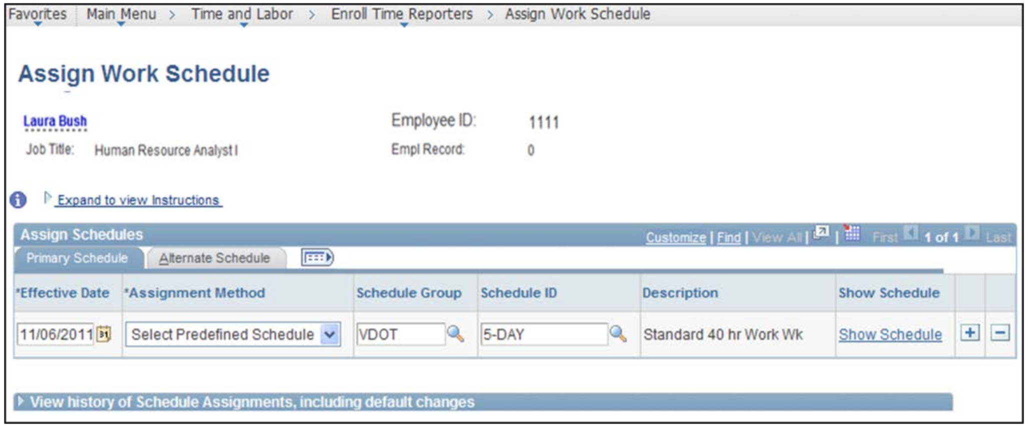


Assigning Work Schedule to Employee

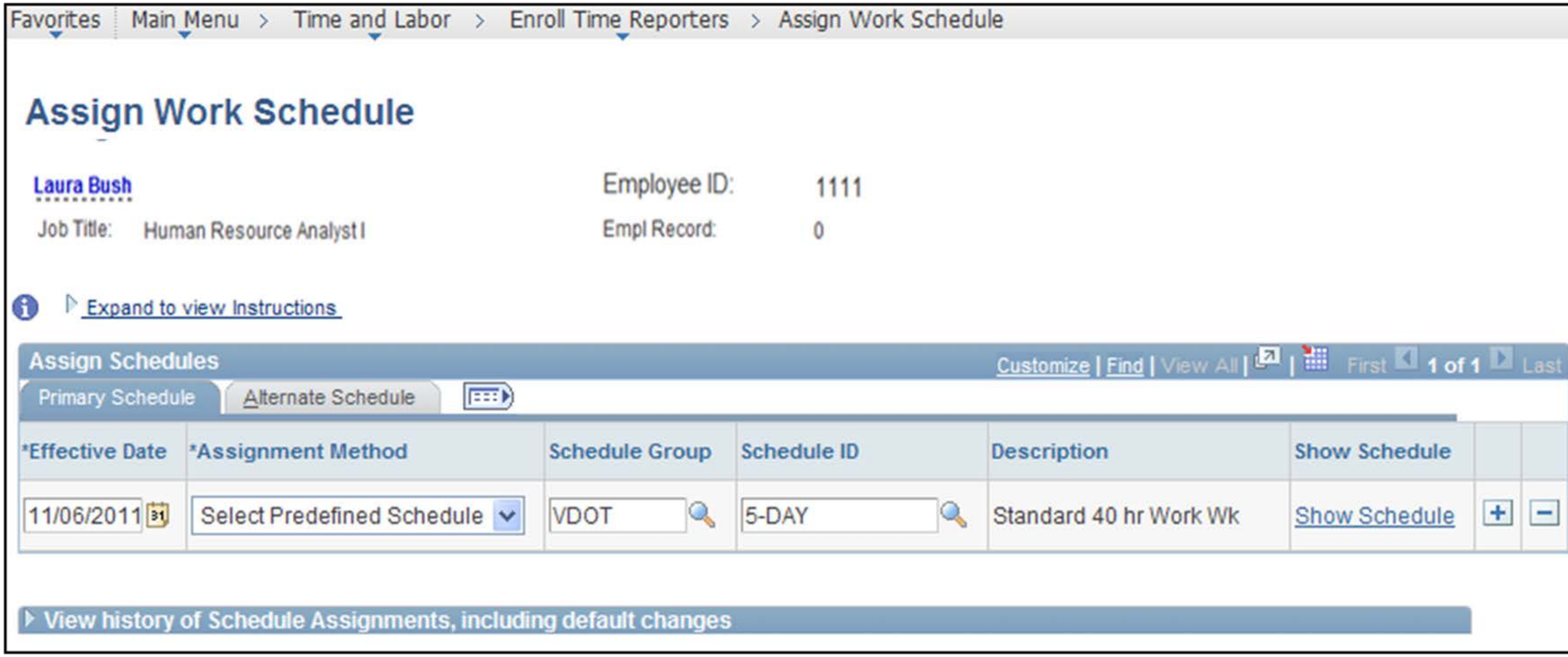
On the **Assign Work Schedule** page, follow these steps:

- Click on the **[+]** button to add a new row.
- Click in the **Effective Date** field and insert the effective (start) date that the schedule was in effect (this can be past, present or future).
- Click the dropdown box in the **Assignment Method** field. There are three options in the dropdown which are:
  - **Select Predefined Schedule:** Use this option to choose one of the configured schedules
  - **Create Personal Schedule**: Do not use this option.
  - **Use Default Schedule**: Set up as a Monday-Friday (5 day 8 hour day). This option should never be used. Since there are no default schedules, Cardinal recognizes this option as if the employee does not have a schedule.
- Choose **Select Predefined Schedule** option
- Click the magnifying glass next to the **Schedule Group** field and choose **VDOT**, which is the only option.
- Click in the **Schedule ID** field and select the ID for the new schedule.
- Click on the **Start** button to save your changes.

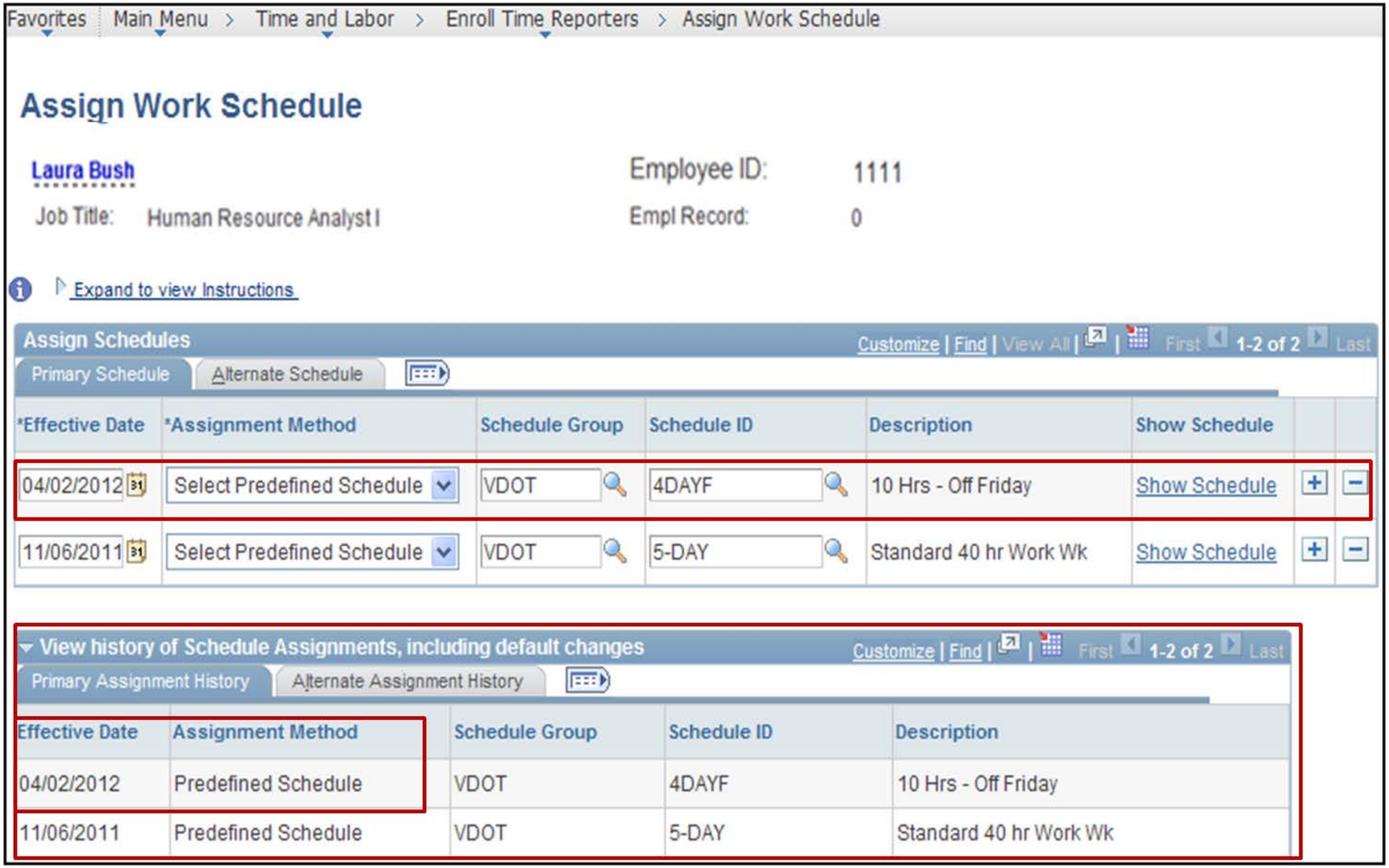
It is best practice to start a new schedule on a Monday's date, since all schedules have their week defined as Monday to Sunday.



Assigning Work Schedule to Employee (continued)



Assigning Work Schedule to Employee (continued)



Lesson 4: Summary

In this lesson, you learned:

- How to assign a work schedule to an employee.

Lesson 5: Reports, Queries, and Online Inquiries

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

- Reports
- Queries
- Online Inquiries

Two Categories of Key Reports

Two categories of key reports particularly useful for Payroll, Employee Setup and Time & Labor Administrators include:

- Reports that validate time entry and approvals
- Reports that identify payroll discrepancies between timesheet and CIPPS data

Reports that Validate Time Entry and Approval

There are several reports that validate time entry and approvals. They include:

- **Employee Leave Detail Report**
- **Timesheet Report**
- **Timesheet Exception Report**
- **Summary of Productive Hours Report**
- **Hourly Employee Tracking Report**
- **Time Card Report**
- **Payable Status Report**
- **Payable Time Allocation Staging Report**
- **Employee Job Status Changes Report**
- **Potential Vacation Leave Forfeiture Report**
- **Leave Donation Report**

Employee Leave Detail Report

The Employee Leave Detail Report provides leave balances and related detail transactions (if selected) for:

- an individual employee
- a specified organization
- a specified group of organizations such as a district-wide or residency-wide as reflected on the organization tree

The leave types included in this summary section include any/all leave types that have had any activity from the beginning of the Leave Year through the Pay Period End Date as 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 with multiple transactions (e.g., accruals, takes, adjustments, and donations) calculates to zero (00.0), that leave type is included, reflecting the various types of leave activity that net to zero.

Employee Leave Detail Report (continued)

A leave type with no activity, with zero (00.0) Balance Forward, and with zero (00.0) Current Balance for the time span of the report as specified in the run control parameters is not included on the report.

You can access this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Employee Leave

Timesheet Report

This report provides a summary of the number of hours by charge distribution by day for an employee. This report provides the following information:

- A record of time reported for a period
- Identifies insufficient hours/incomplete timesheets
- Whether the time was submitted or approved
- Reported hours by TRC and charge distribution of timesheet entries by day.
- Approvers of time entries
- Productive and non-productive hours entered within a pay period

Use the Report **Run Control** to choose the options you want displayed in the report. There are six groups of report Run Control selection criteria. They include:

- Overall selection parameters of Set ID and Business Unit
- Select Pay Period of From and To Date
- Employees to Process (i.e., all employees that “Reports to Position Number”, or a single Empl ID, or all employees either related to a specified node on the DEPT_OVERALL tree or, if Node is also selected with Department, then only those employees directly related to the specified Department

Timesheet Report (continued)

- Employee Type - either Salaried or Hourly; can only be used with Reports to Position Number or Department , not Empl ID)
- Show All Statuses (or Action Required Only) - check Action Required Only to return only those timesheet transaction that require review approval and denial or do not check Action Required Only and return all statutes
- TRC - optionally select Time Reporting Codes to include as part of the report Run Control criteria

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Timesheet Report

Timesheet Schedule Exception and Overtime Review 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 and payable time.

Every salaried employee in Cardinal is assigned a weekly or bi-weekly schedule. All hourly employees have a schedule of 0 hours. For salaried employees, the report shows if you have not worked your scheduled hours yet for the pay period or if you have entered more hours than your scheduled hours. For both salaried and hourly employees, this report has the ability to track eligible overtime and confirm your timesheet is submitted. Timesheets must be submitted for the custom allocation process to perform correctly.

You can access this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Timesheet Exception Report

Summary of Productive Hours Report

This report provides managers with a view of productive hours worked for a specific time period by organization and/or employee(s).

You can access this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Summary of Productive Hours Report

Hourly Employee Tracking Report

This report shows Hourly Employees and Emergency Hourly Employees approaching or exceeding the hourly limitations for their contract period.

You can access this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Hourly Employee Tracking Report

Time Card Report

This report summarizes an individual employee's time entries for a given period of time.

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Time Card Report

Payable Status Report

This report identifies TRCs, hours, and payable status entered each day for a one-week period by employee or Workgroup.

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Payable Status Report

Payable Time Allocation Staging Report

After the custom allocation process has distributed the dollars that CIPPS calculated for the employee's payroll over into Payable Time, this reconciliation report is run to confirm that all dollars loaded to the custom staging table were allocated into TL payable time.

The Payable Time Allocation Staging Recon Report has two sections. The first section shows sum of dollar amounts by location allocated for all employees on the timesheet and the sum of all dollar amounts received in the Expanded Current Earnings file. There is a column that indicates whether there is a match in dollar amounts.

The second section of the report lists each employee and their totals by TRC for the pay period. It sums up all the dollars by TRC and has a total dollar figure for each employee. A second column shows the total dollar amount from the staging table. The report then compares the two total figure amounts and if there are any discrepancies, they are identified in this section of the report.

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Payable Time Allocation Staging

Potential Vacation Leave Forfeiture Report

This report tracks vacation leave type to determine absence balances and maximum carry forward. It also identifies employees at risk of forfeiting absence entitlements within a predefined timeframe.

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Potential Leave Forfeiture

Reports that Identify Payroll Discrepancies

There are two key reports that are used to identify payroll discrepancies. They are as follows:

- **CIPPS Exception Report**
- **Earnings Mismatch Report**

CIPPS Exception Report

This report identifies mismatches between CIPPS and Cardinal. An example of a mismatch is earnings paid in CIPPS but no timesheets to allocate those earnings.

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > CIPPS Exception Report

Earnings Mismatch Report

This report validates all dollars received by CIPPS are accurately allocated by employee’s timesheets.

You can navigate to this report using the following path:

Cardinal HCM > Main Menu > Time and Labor > Reports > Earnings Mismatch Report

Queries

There are several queries available for Administrators. They include:

- **Special Pay**
- **CIPPS Control Totals**
- **Leave Donation**
- **Employee Job Status**

Special Pay (Query)

Special pays are payments made to employees outside of their regular pay such as bonuses and monetary award recognitions. Special pays are entered in CIPPS and sent to Cardinal in the expanded current earnings file (ECE) semi-monthly via TA557 – Payroll Upload – CIPPS and stored in a staging table within Cardinal.

This query is a scheduled query that runs semi-monthly or biweekly after each load of the ECE file. The query provides by employee)a list of the CIPPS special pay codes, the amounts, and the associated voucher numbers processed within the pay period. As part of the CIPPS Payroll upload process, the output of this query is used to research and verify special pays processed per pay period.

This query is accessible only to Payroll Administrators who research special payments so they can be correctly allocated.

You can navigate to this query using the following path:

Cardinal HCM > Main Menu > Reporting Tools > Query > Query Viewer > V_TA_SPECIAL_PAY

CIPPS Control Totals Query

The purpose of the CIPPS Control Totals query is to give the Fiscal Payroll reconciliation group a view of expanded current earning from the Payroll Upload – CIPPS (TA557) for the current pay period date reporting on each District/Central Office.

You can navigate to this query using the following path:

Cardinal HCM > Main Menu > Reporting Tools > Query > Query Viewer > V_TA_CIPPS_CNT_TOTALS

Leave Donation Query

In Cardinal, the Leave Donation program enables employees to donate their accrued vacation to other employees who have exhausted their own entitlement balances. There are two reporting requirements for tracking donations. One requirement is to track employees who have donation balances but are no longer eligible to use them. The second requirement is to track donated leave used in a defined period of time.

You can navigate to this query using the following path:

Cardinal HCM > Main Menu > Reporting Tools > Query > Query Viewer > V_TA_DONATED_LEAVE

Employee Job Status Changes Query

This query tracks Employee status changes such as suspension, termination, including terminations due to death of the employee. The query runs based on the following parameters:

- Business Unit
- Org Code
- Employee ID
- Begin Date
- End Date which will pull ranges of Effective Date
- Change Type

You can navigate to this query using the following path:

Cardinal HCM > Main Menu > Reporting Tools > Query > Query Viewer > V_TA_EMP_JOB_STA_CHNGS

Online Inquiries

There are two key online inquiries available. They are:

- **Payable Time Detail**
- **Exceptions**

Payable Time Detail Online Inquiry

This inquiry shows the status of all time processed by the Time Administration process and the associated charge distribution.

You can navigate to this inquiry using the following path:

Cardinal HCM > Main Menu > Manager Self Service > Time Management > View Time > Payable Time Detail

Exceptions Online Inquiry

This inquiry shows all exceptions by employee that are unresolved.

You can navigate to this online inquiry using the following path:

Cardinal HCM > Main Menu > Time and Labor > View Exceptions and Attendance > Exceptions

Input the criteria on the **Employee Selection Criteria** page to view exceptions.

Lesson 5: Summary

In this lesson, you learned:

- There are two categories of key reports for Administrators:
  - Reports that validate time entry and approvals
  - Reports that identify payroll discrepancies - these reports identify discrepancies between timesheet and CIPPS data
- There are several queries available for Administrators. They include:
  - Special Pay
  - CIPPS Control Totals
  - Leave Donation
  - Employee Job Status
- There are several online inquiries available for Administrators. They include:
  - Payable Time Detail
  - Exceptions

Course Summary

In this course, you learned how to:

- Create and maintain position and job data
- Enroll and maintain Time Reporters
- Manage work schedules
- Manage and update time after payroll processing
- Describe key reports, queries and online inquiries

Lesson 6: Time & Attendance Administration Hands-on Practice

This lesson includes practice that will reinforce the lessons learned today. Your instructor will provide direction regarding specific activities that are part of this lesson. Please ask your instructor if you have any questions.

Course Evaluation

Congratulations! You have successfully completed the **TA363: Time & Attendance Administration** course. Please use the evaluation link to assess this course.

Supplemental Training for Payroll Administrator and Time & Labor Administrator

Lesson 7: Managing and Updating Time After Payroll Processing

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

- Managing CIPPS/Cardinal Timesheet Discrepancies
- Payable Time Allocation and Staging Recon Report
- Running Time Administration Ad Hoc
- Handling Allocation Process and HR Accounting Line Creation

Managing CIPPS/Cardinal Timesheet Discrepancies and Steps to Resolve

Payroll Administrators are responsible for ensuring that employee dollars are allocated correctly at the end of each pay period. The CIPPS Exception Report identifies discrepancies.

Once a payroll is processed by CIPPS, the related expanded current earnings file (ECE) is loaded from CIPPS into Cardinal.

The CIPPS Exception Report identifies the following discrepancies:

- Employees on ECE (Expanded Current Earnings) file with inactive job status
- Employee received on ECE but does not exist in Cardinal
- Employees on ECE file who do not exist as a Time Reporter or who is Inactive as a Time Reporter
- CIPPS Company (identifies district, hourly payroll) does not match the district stored in Cardinal
- Missing timesheets
- Time not approved
- Time exists as reported time only
- Hours Reported but no pay
- User Field 2 (Pay Run ID) is not populated – if not populated, then dollars cannot be allocated. This field is where the Administrator inputs the **Pay Run ID,** which identifies pay period begin and end dates.

Error Message: Employee on ECE File But Has Inactive Job Status

If this error appears on the CIPPS Exception Report, it may mean that the employee is inactive in Cardinal.

The Administrator will need to determine if the inactive status is valid and then take the appropriate action:

- If it is not valid, update the employee status to active.
- If it is valid, determine if the employee should be paid for the time depending on the individual situation.

Error Message: Employee Received on ECE But Does Not Exist in Cardinal

This means CIPPS paid someone who does not exist in Cardinal.

The Administrator will need to do the following:

- Verify that the employee exists and should be paid
- Determine if the employee data exists
- If not, enter employee data into PMIS and/or Cardinal
- Enroll as a Time Reporter (this includes Comp Time and Overtime plans and assign work schedule)
- Enter the correct time entries on the timesheet
- Run Time Administration
- Approve the time

Error Message: Employee on ECE File But Does Not Exist or Is Inactive as a Time Reporter

This error may mean that the employee was not enrolled as a Time Reporter. If so, enroll the person as a Time Reporter.

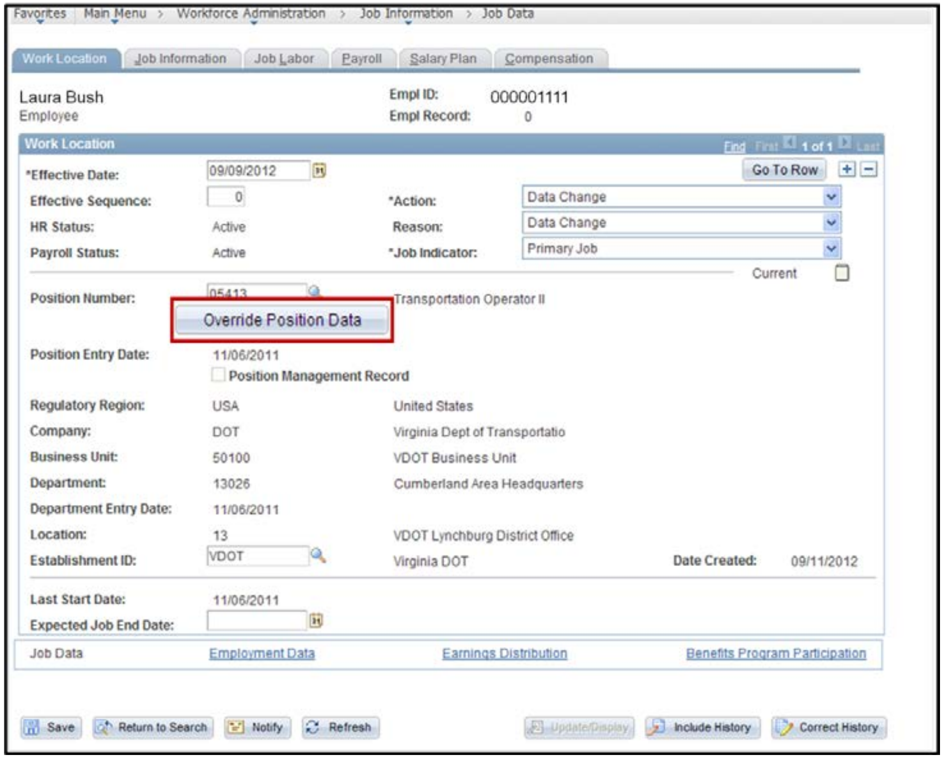
If employee is inactive as a Time Reporter, investigate to determine if the employee should be active or was inactivated for the wrong time period. If that is the case, the Administrator will need to do the following:

- Verify that the employee exists and should be paid
- Determine if the employee data exists
- If not, enter employee data into PMIS and/or Cardinal
- Enroll as a Time Reporter (this includes Comp Time and Overtime plans and assign work schedule)
- Enter the correct time entries on the timesheet
- Run Time Administration
- Approve the time

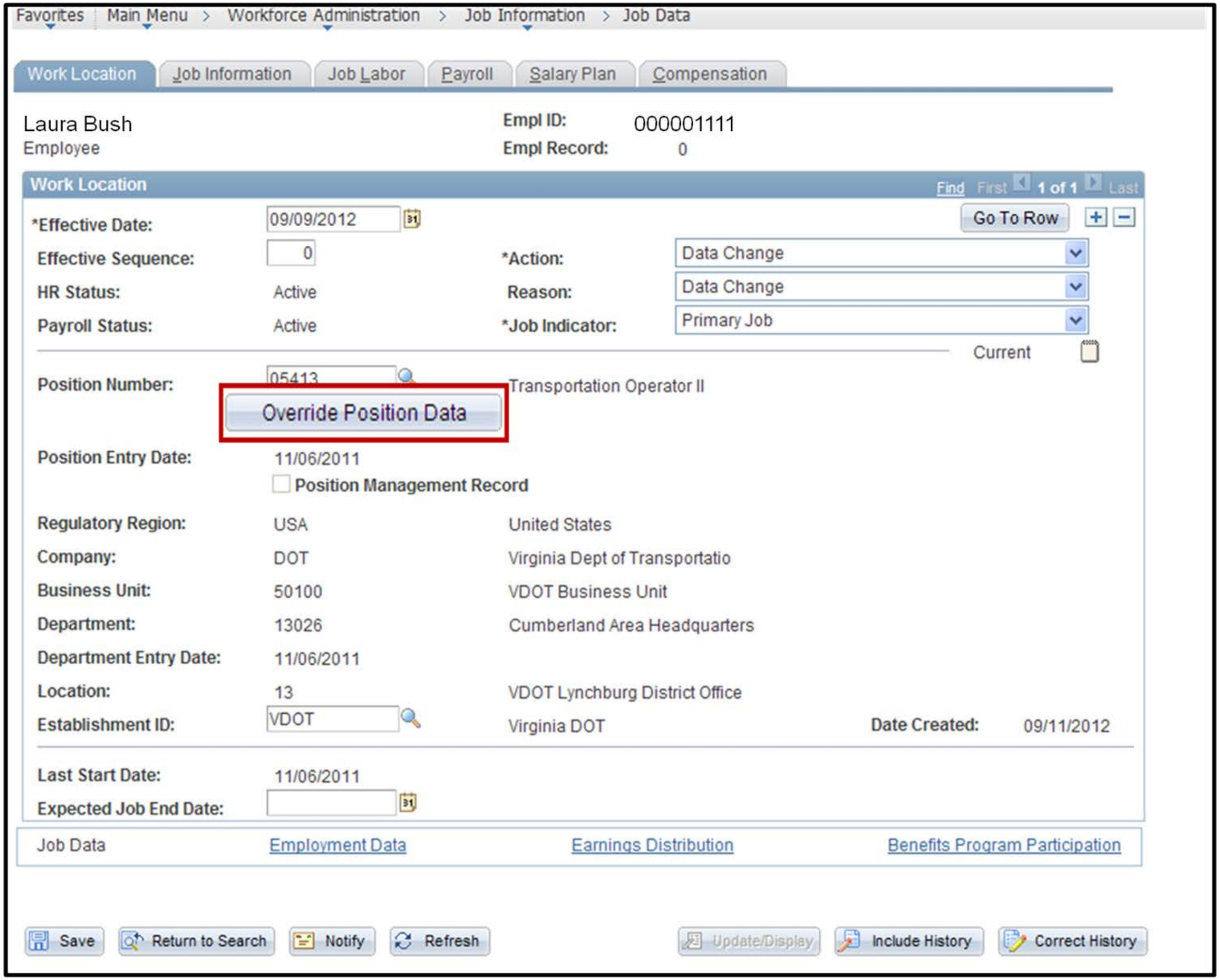
Error Message: The CIPPS Company Does Not Equal the District Stored in Cardinal

The correction of this error depends on the error. For example:

- If the position is assigned to the wrong department/location, go to position data and make the correction.
- If there are special circumstances where the position number is under a different department or location, you may need to override position data.
- If the issue is not one of the ones listed here, you may need to do additional research to identify the issue.



Error Message: The CIPPS Company Does Not Equal the District Stored in Cardinal (continued)



Error Message: Time Not Approved

If the error message indicates that the time was not approved, you need to go in and approve the time after receiving written consent from the supervisor to do so.

Error Message: Time Exists as Reported Time Only

There are two instances that this could occur:

1. Employee recorded time, saved it, but did not submit.
    - To correct this error, submit the time, run Time Administration and then approve
2. A high exception occurred.
    - To correct error, access the exception and depending on the exception, make the correction, run Time Administration and then approve the time.

Error Message: Hours Reported But No Pay

If the error message indicates that hours were reported for an employee, but no pay was received for those hours, you should review the CIPPS employee data to determine what caused the employee to not receive pay.

Error Message: Missing Timesheets

If there is a missing timesheet, the error message reads “Employee received an ECE but does not have corresponding time entries in Cardinal.” This means that the employee was paid but has no hours in Cardinal to allocate their pay.

In this example, you need to:

1. Input hours for the employee and update User Field 2 with the current Pay Run ID of the pay period being processed in order for the dollars to be allocated.
2. Run Time Administration.
3. Approve the hours.

Error Message: User Field 2 is Not Populated

If there is an error message indicating that the Pay Run ID in **User Field 2** is not populated, then the Administrator will need to populate that field based on whether the employee is Salaried (overtime) or Hourly (regular or overtime).

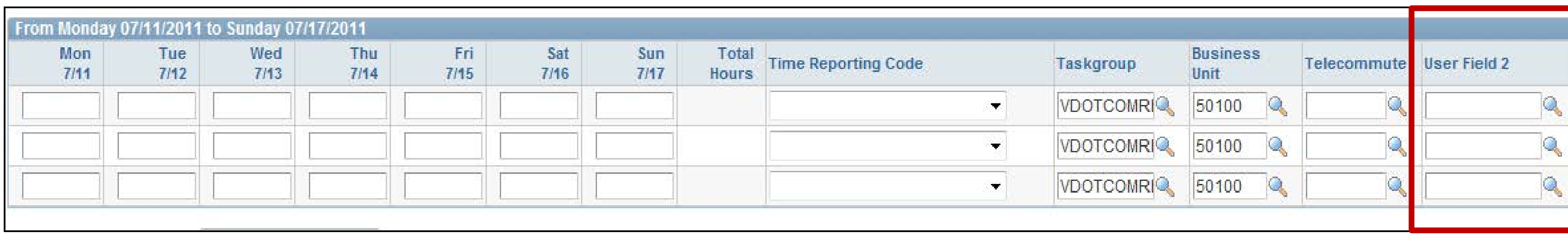
There are three instances when this field would need to be populated:

1. Entering missing overtime hours for Salaried employees
2. Entering missing overtime hours for Hourly employees
3. Entering missing regular hours for Hourly employees

Error Message: Enter Pay Run ID

User Field 2 can be found on the timesheets next to the **Telecommute** field. This field is not visible to Self Service users, Timekeepers or Managers. This field is where the Administrator would input the **Pay Run ID** which identifies pay period begin and end dates.

Select the **Pay Run ID** that corresponds with the appropriate pay period.



Error Message: Enter Pay Run ID (continued)

A **Pay Run ID** is structured to identify the pay cycle (semi-monthly or bi-weekly), earnings type (regular or overtime) pay period (01 through 26) and fiscal year.

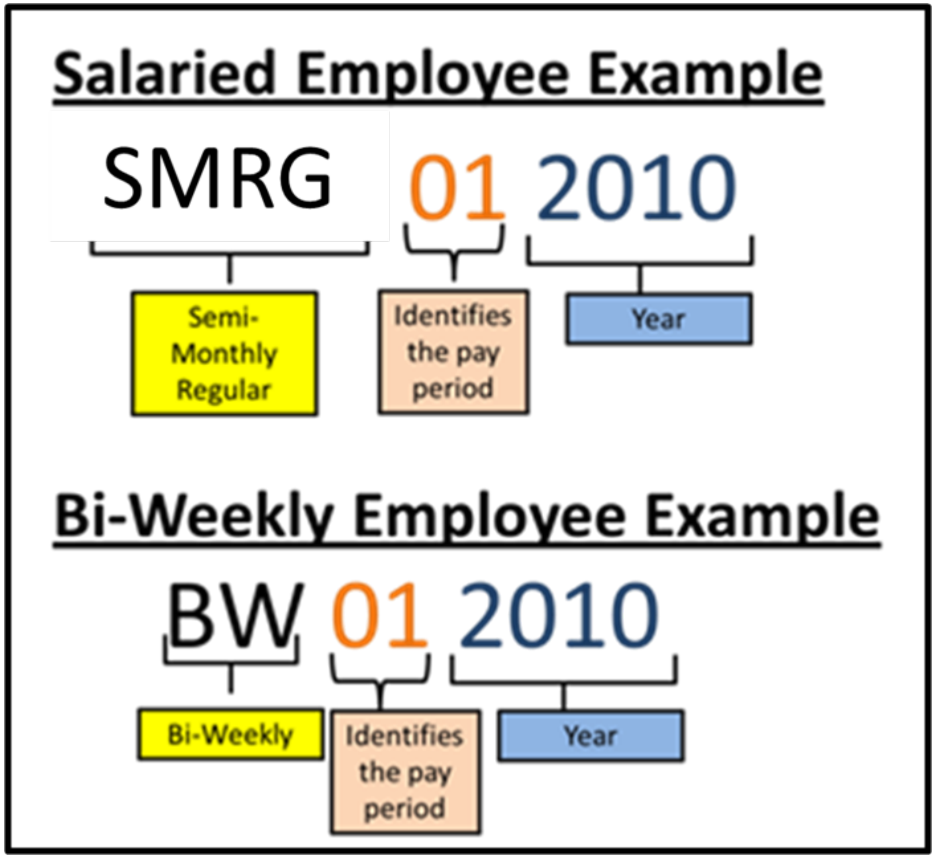
Salaried Employees

SMRG012010 – Semi-monthly regular pay period for the 1st pay period of 2010

SMOT012010 – Semi-monthly overtime for 1st pay period of 2010

Hourly Employees

BW012010 – Bi-weekly pay period for the 1st pay period of 2010 and can be used for regular and overtime pay



Payable Time Allocation Staging Recon Report

The Payable Time Allocation Staging Recon Report identifies discrepancies between the dollar amounts received on the Expanded Current Earnings file and the total dollar amounts that were allocated by the timesheet.

The Payable Time Allocation Staging Recon Report has two sections.

The first section shows sum of dollar amounts by location allocated for all employees on the timesheet and the sum of all dollar amounts received in the Expanded Current Earnings file by Location (VDOT’s District). If there are any discrepancies between the two dollar amounts, they are identified in this section of the report. There is a column that indicates whether there is a match in dollar amounts.

The second section of the report shows both the TRC level and the grand total of all dollar amounts by employee that are allocated on the timesheet and that are received in the Expanded Current Earnings file. This section lists each employee and their totals by TRC for the pay period. It sums dollars by TRC and generates a total for each employee. A second column shows the total dollar amount from the staging table. The report then compares the two total amounts. Any discrepancies are identified in this section of the report.

The report also indicates whether the dollar amount in CIPPS matches the payable time dollar amount.

Any errors not addressed in Managing CIPPS/Cardinal Timesheet Discrepancies appear here.

Payable Time Allocation Staging Recon Report (continued)

The Payable Time Allocation Staging Recon Report is used to identify dollar discrepancies between what was sent from CIPPS to what was allocated in Cardinal. Two scenarios where you may see something on this report are as follows:

1. Prior period adjustments were made that resulted in hours adjusted for an employee. The adjusted hours do not match what the employee was paid. These entries are not allocated and are fixed by manual correction to the timesheet, in order for the allocation process to reallocate the dollars correctly.
2. Employee does not have timesheet but has earnings on the Expanded Current Earnings file. This error is identified by the CIPPS Exception Report and if not fixed before running the allocation process appears on the Payable Time Allocation Staging Report because it may result in dollar amounts not being allocated. These types of errors can be resolved by entering a timesheet or by allocating dollars by direct journal.

Once errors are identified:

- Fiscal / Accounting Sections coordinate in making adjustments.

Reasons to Run the Time Administration Process Ad Hoc

The Time Administration Process is run nightly as a batch process. The process may also need to run ad hoc, generally at payroll close, for other reasons such as:

- Correcting or adjusting timesheets
- Missing timesheets
- Correcting Exceptions

You can navigate to the **Request Time Administration** page using the following path:

Cardinal HCM > Main Menu > Time and Labor > Process Time > Request Time Administration (search)

Running Time Administration Ad Hoc Steps – Find or Add Run Control

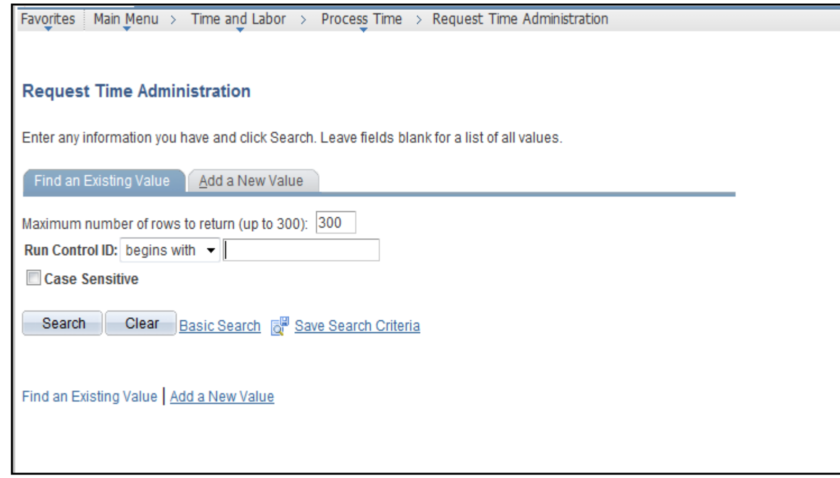
The following are the steps you need to follow to run the Time Administration process ad hoc once you access the path:

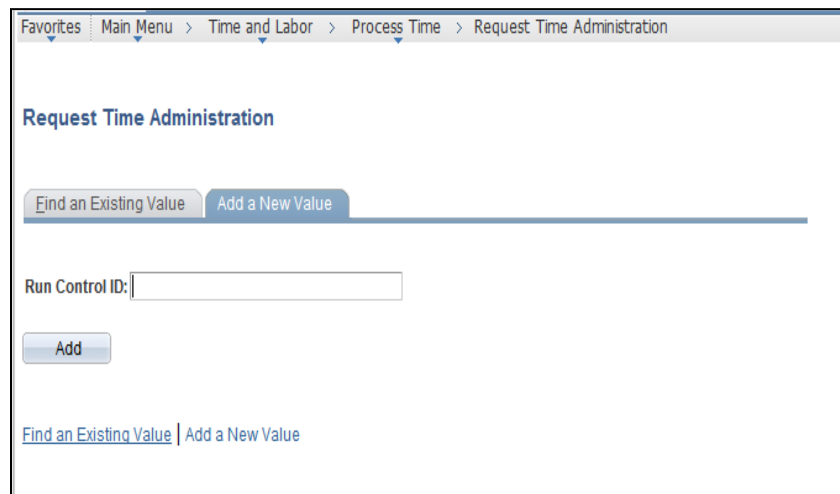
1. Log into Cardinal and access the Cardinal HCM Home page.

2. You can navigate to this process using the following path: **Cardinal HCM > Main Menu > Time and Labor > Process Time > Request Time Administration**

3. The Request Time Administration page will display. You can either:
    - Add a Run Control ID by clicking the **Add A New Value** tab. Enter the value you would like to us as your Run Control ID then click the **Add** button.
    - Use an existing Run Control ID by entering it in the **Run Control ID** field then click the **Search** button.

4. The Request Time Administration page displays.





Running Time Administration Ad Hoc Steps – Select Run Control Parameters

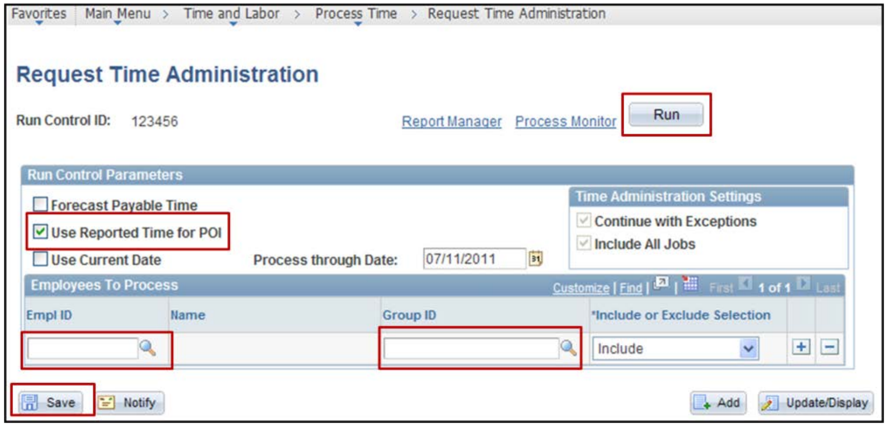
5. When you access the page, uncheck the indicator for Use Reported Time POI.

6. You can run Time Administration for one employee or a group using the **Emp ID** and **Group ID** fields, respectively. If you select to run Time Administration for a group, there are three options to choose:
   - **VDOTALL** – all active VDOT employees
   - **VDOTHRL** – all active VDOT hourly employees
   - **VDOTSAL** – all active VDOT salaried employees

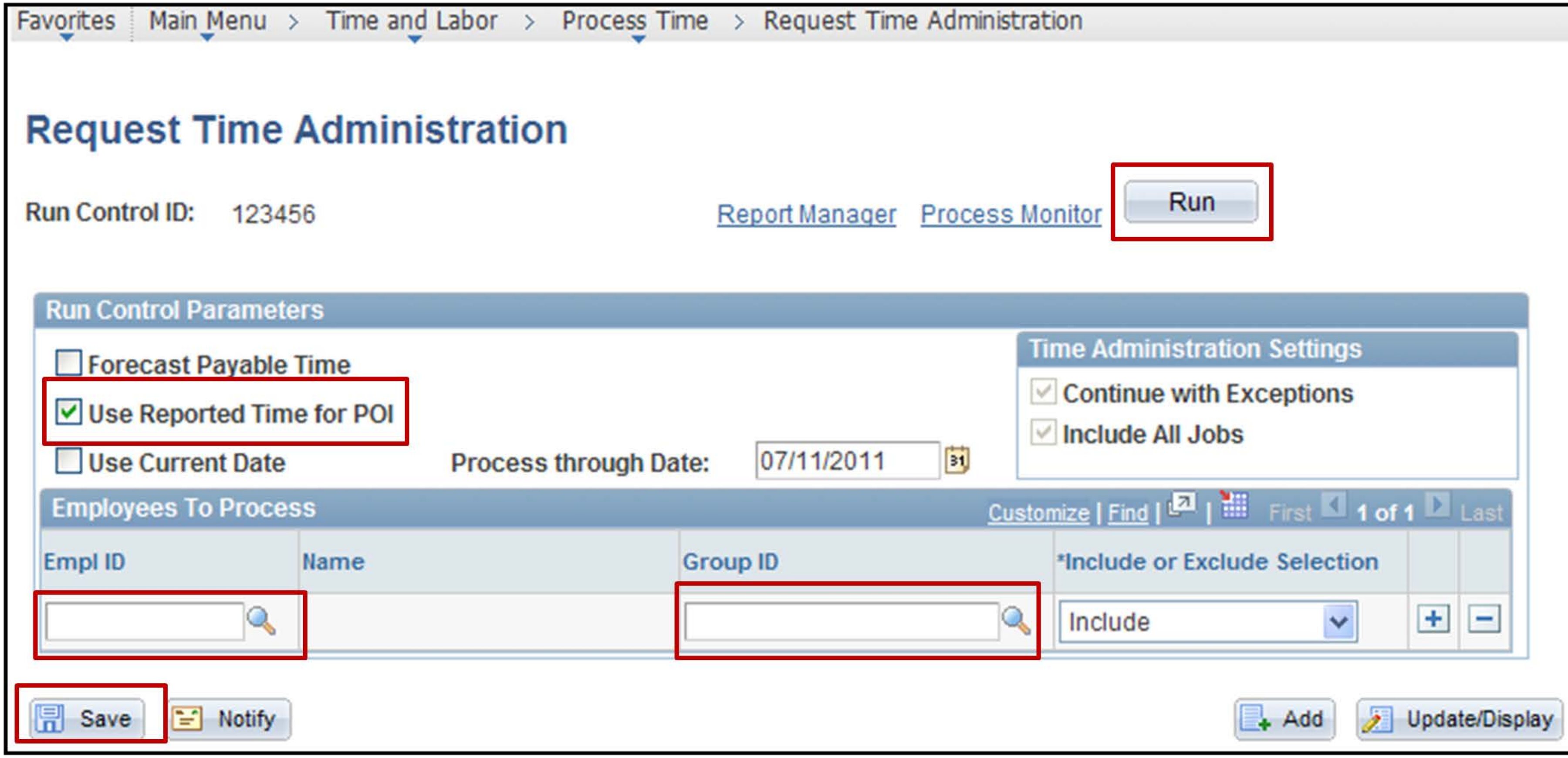
7. Enter the employee or group of employees you want to process.

8. Click the **Save** button if you wish to save this run control for future use.

9. Click the **Run** button.



Running Time Administration Ad Hoc Steps – Select Run Control Parameters (continued)

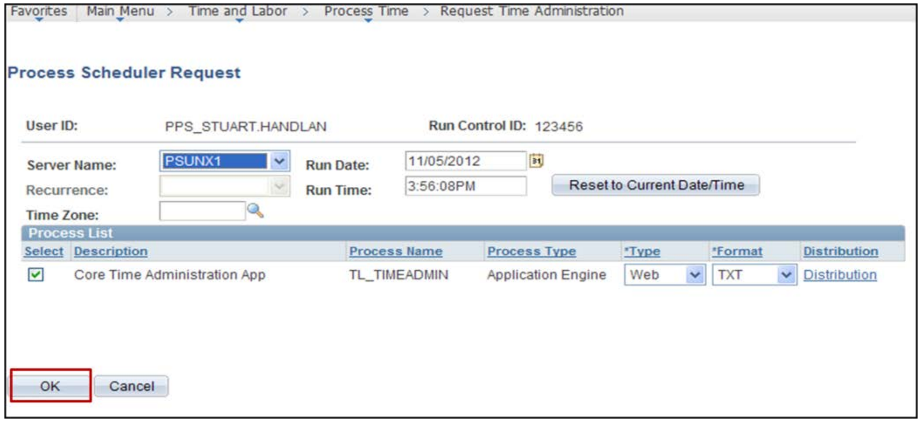


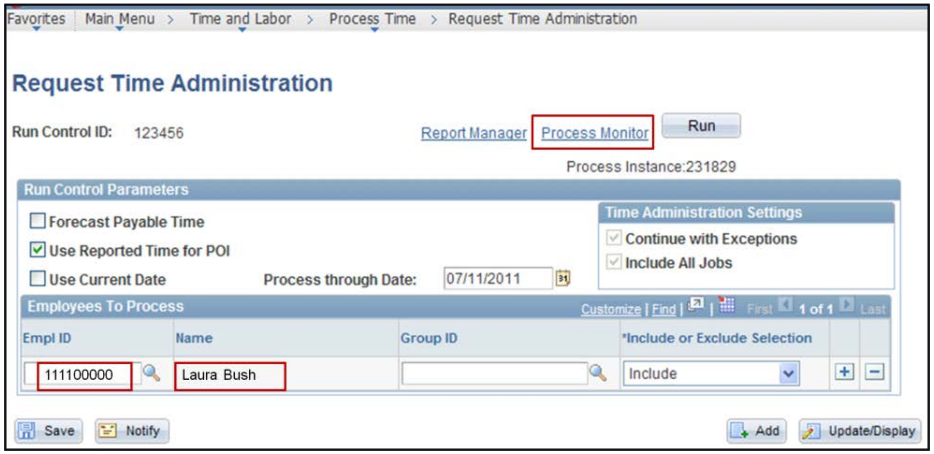
Running Time Administration Ad Hoc Steps – Process Scheduler

The Process Scheduler Request page will display.

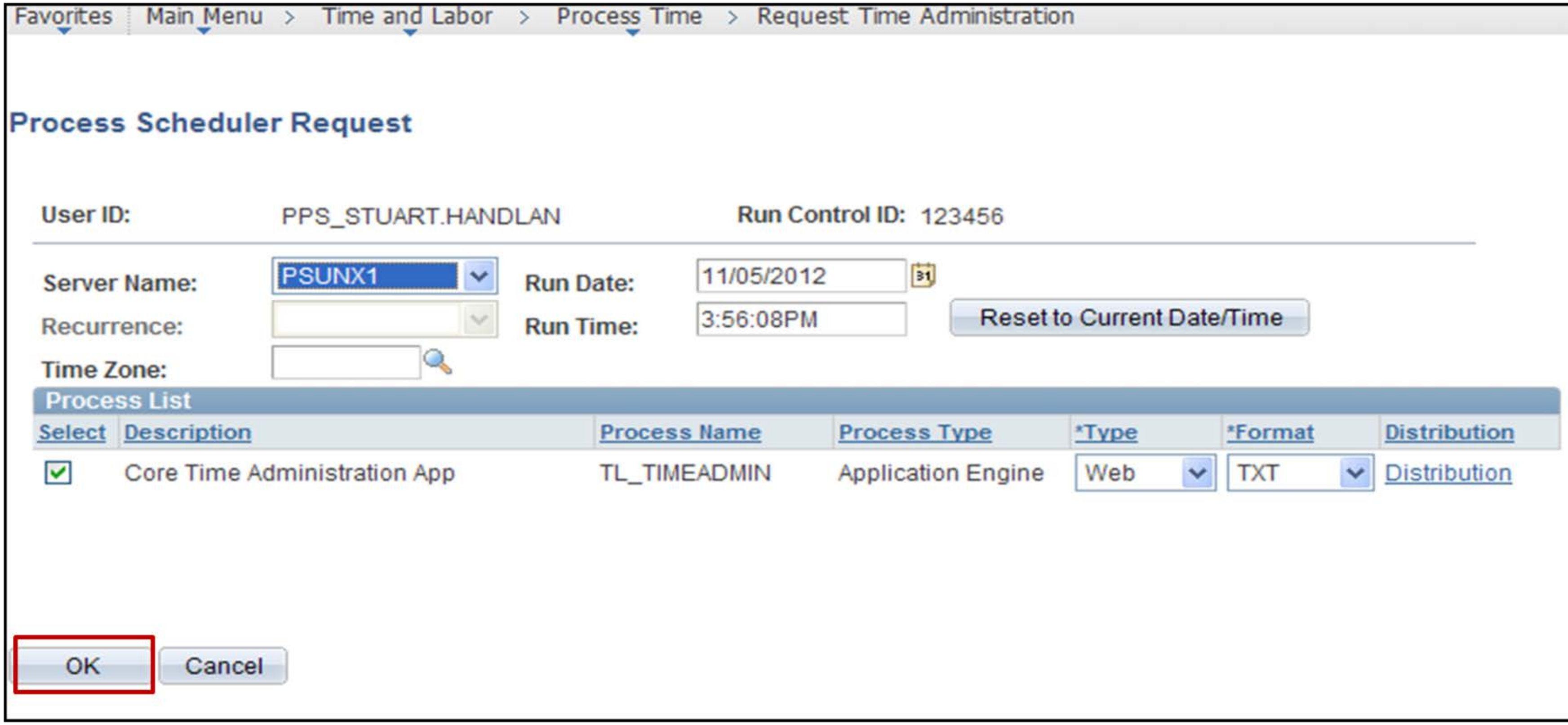
10. Click the **Ok** button and Cardinal will return you to the **Request Time Administration** page.

11. Click the **Process Monitor** link to view the status of the report.

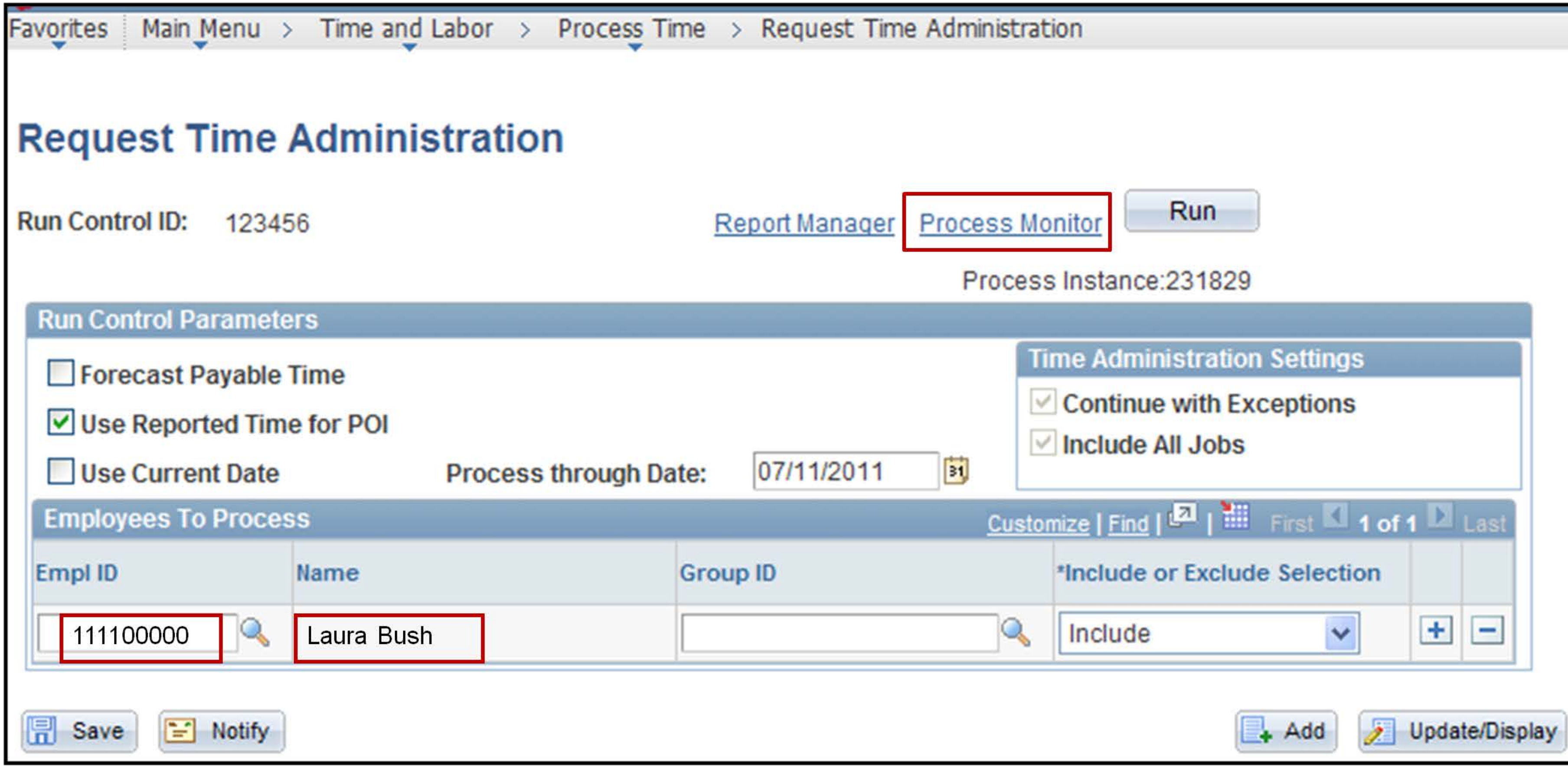




Running Time Administration Ad Hoc Steps – Process Scheduler (continued)



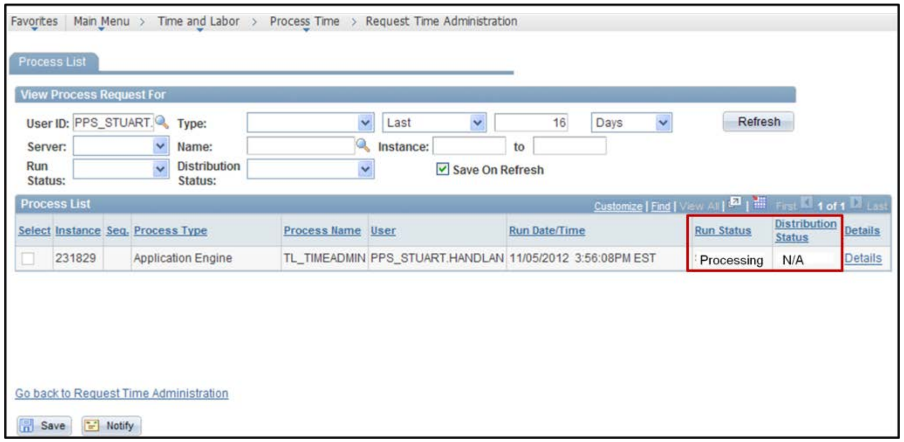
Running Time Administration Ad Hoc Steps – Process Monitor

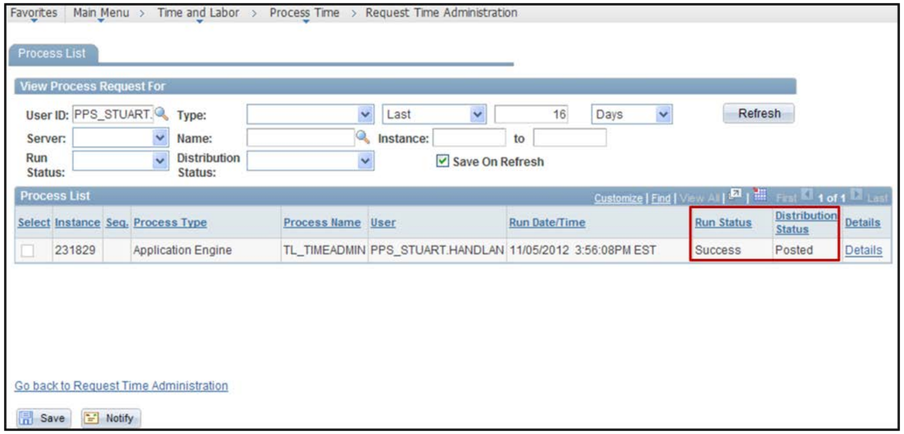


Running Time Administration Ad Hoc Steps – Process Monitor Status

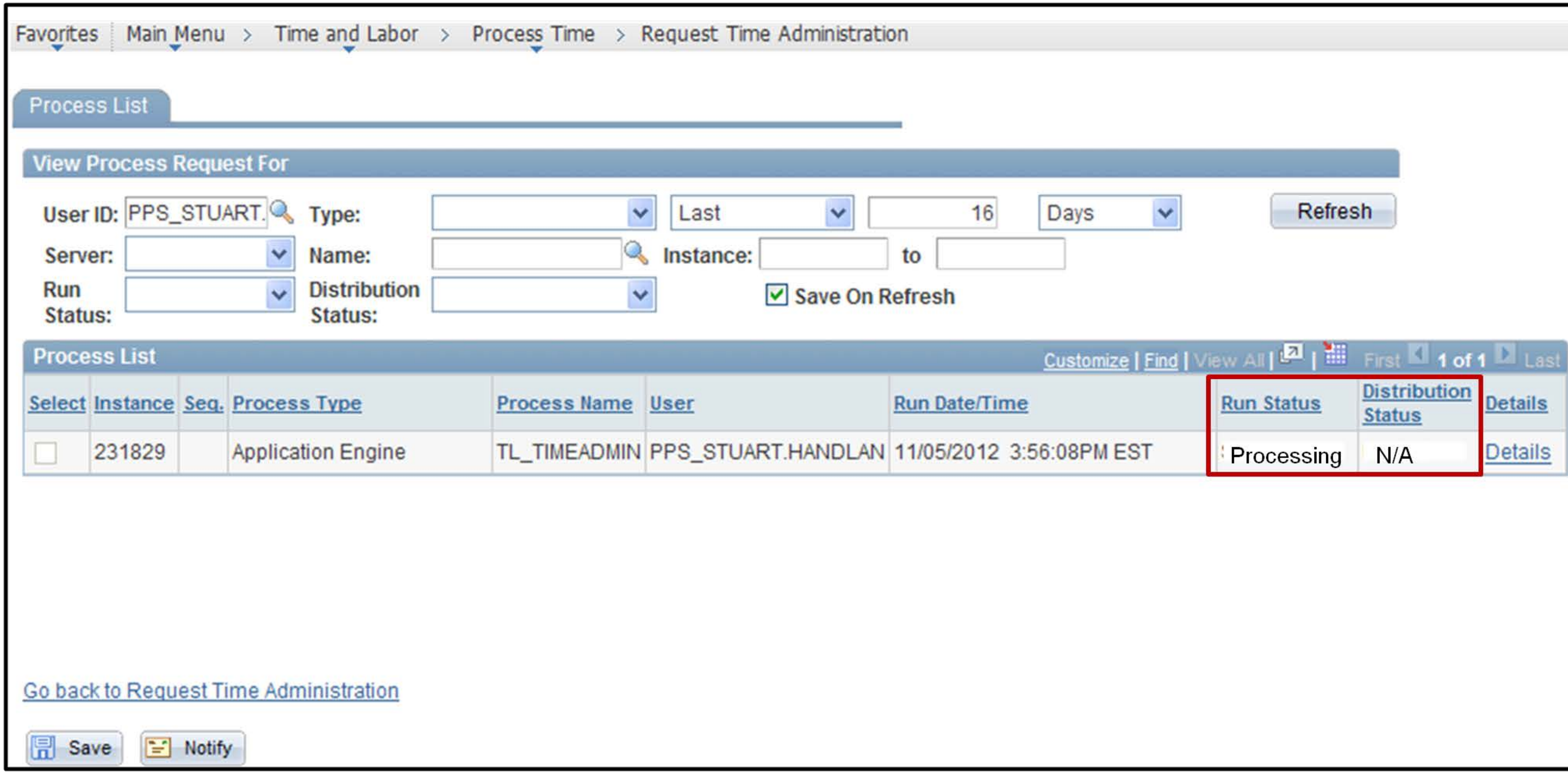
12. You can click the **Refresh** button after several seconds to see the updated status.

When the status reflects success, Time Administration has been completed for your selection.

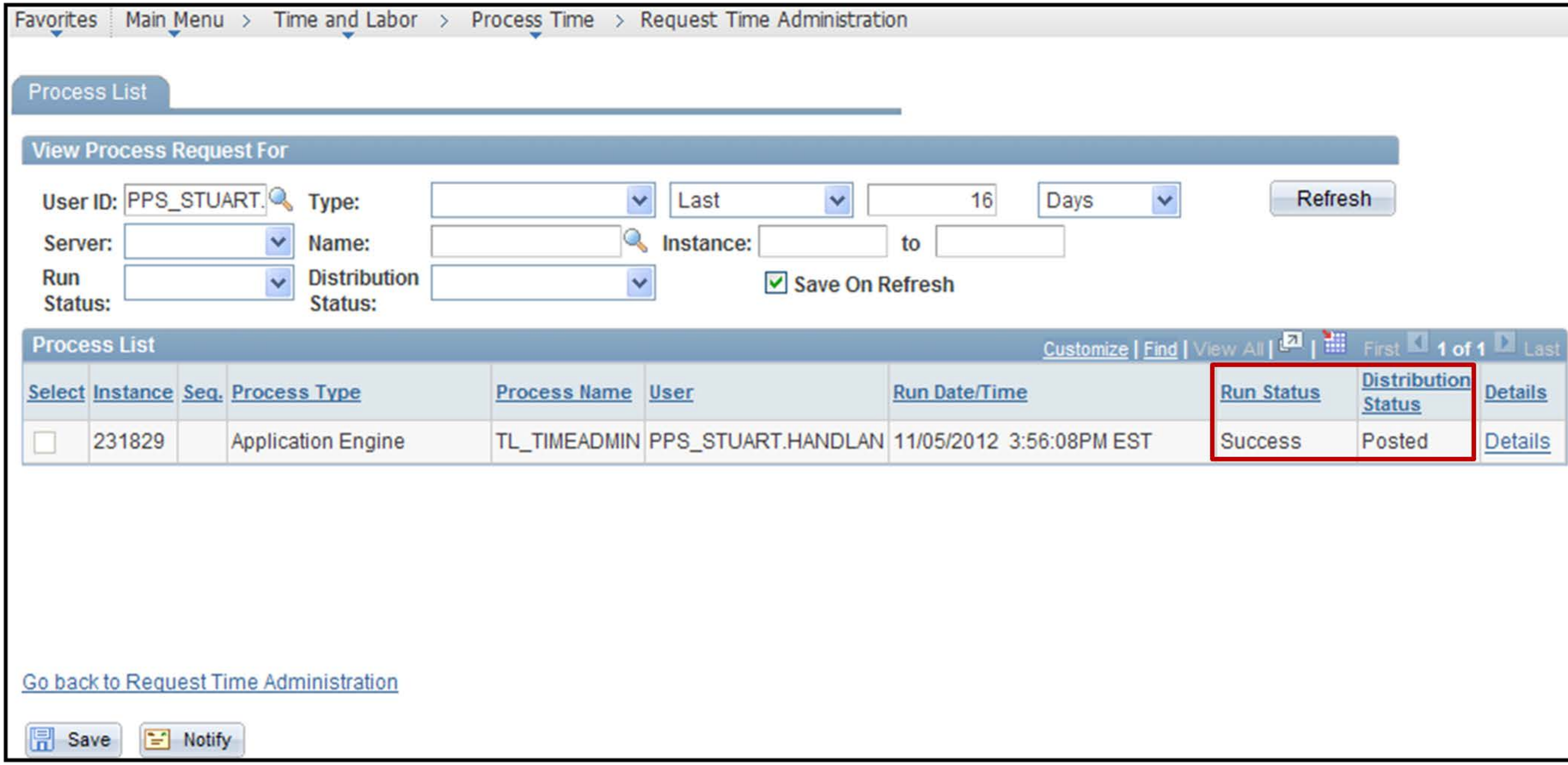




Process Monitor Run Status and Distribution Status



Run Status: Processing to Success; Distribution Status: N/A to Posted



Allocation Process and HR Accounting Line Creation Process

The Allocation Process and HR Accounting Line Creation are batch processes that are manually submitted at the end of the pay period.

The Allocation Process distributes dollar amounts received in the Expanded Current Earnings file according to the employee timesheets. Once the allocation is complete, the HR Accounting Line process is run.

The HR Accounting Line process combines timesheet accounting lines that are charged to the same accounting distribution into one accounting line.

Lesson Summary

In this lesson, you learned:

- Payroll Administrators are responsible for ensuring that employee dollars are allocated correctly at the end of each pay period. Payroll Administrators uses the CIPPS Exception Report to identify discrepancies.

- The Payable time Allocation Staging Recon Report has two sections; the first section shows sum of dollar amounts by location allocated for all employees on the timesheet and the sum of all dollar amounts received in the Expanded Current Earnings file. There is a column that indicates whether there is a match in dollar amounts.

- The Time Administration Process is run nightly as a batch process. The process may also need to run ad hoc, generally at payroll close, for other reasons such as:
  - The process for correcting and adjusting timesheets
  - The process for identifying missing timesheets
  - The process for correcting exceptions identified on the time sheet.
  - The Allocation Process and HR Accounting Line Creation are batch processes that are manually submitted at the end of the pay period.

Appendix

- Key Terms
- Flow Chart Key

Key Terms – Employee Setup

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

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

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

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

Absence Take: The number of hours deleted from an employee's leave balance for a specific absence event.

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

Adjustment: A manually entered increase or decrease to an entitlement balance.

Business Unit: Identifies an operational subset of an organization. In Virginia, each state agency is an operational subset (or business unit) of the Commonwealth. The business unit number identifies each operational subset or agency of the Commonwealth. For example, VDOT is agency 50100.

Key Terms - Timesheet Entry

ChartFields: A field on the Chart of Accounts represents one category of data (e.g., Business Unit, Department, Account, Fund, Program), and uses various values to further define that data. A combination of ChartFields defines an accounting distribution used in the creation of journal entries.

Compensatory Time Plan: Field that identifies employee eligibility for earned time off in lieu of paid overtime. This includes Compensatory Leave Plan and Overtime Leave Plan.

Entitlement Balance: The number of hours of unused entitlement for a particular absence type (e.g., Vacation, VSDP Sick, VSDP Personal).

Job Data: Information about the employee's position, department, job code, and compensation. **Location:** Field that defines the employee's District or Central Office work location.

Payable Time: In HCM, hours that are successfully processed through Time Administration and sent to the employee's supervisor for approval.

Personal Data: An employee's biographical information such as name, address, Employee ID, etc. In Cardinal, it does not include the employee's social security number.

Position Data: Information about a position, including **Department ID** and **Reports To** information.

Reported Time: In HCM (Human Capital Management) application, hours recorded on a timesheet and either saved or submitted, but not yet processed through the Time Administration batch process.

Key Terms - Timesheet Entry

Reports To: Field that associates position to its supervisory position number.

Self Service User/Time Reporter: An employee who reports time on a Cardinal Timesheet.

SpeedTypes: Automatically populate some ChartFields on a transaction. Additional fields (e.g., Account) must be entered manually to successfully submit time.

Submitted Time: In the HCM (Human Capital Management) application, time that is reported and submitted to Time Administration for batch processing.

Taskgroup: All VDOT employees are in the same taskgroup: ***VDOTCOMREQ***. This taskgroup of employees require the same fields be available on a timesheet for time reporting.

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

User Field 1: This provides the ability to associate an accounting entry to a time entry. This value is the run date identifying when the accounting information was sent to GL and PA.

User Field 2: Payroll Run ID that designates the employee timesheet data has been included (added) to the payroll data for that specific payroll period. The data has been extracted and sent to CIPPS for payroll processing.

Key Terms - Timesheet Entry

User Field 3: Payroll Run ID that designates the employee timesheet data has been allocated for that specific payroll period.

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

Key Terms - Absence Management

Workgroup: A group of Time Reporters who share the same Time Reporting Rules and TRC. All Time Reporters must have a valid workgroup. For VDOT's Workgroups 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

Flow Chart Key

FLOW CHART KEY

Symbol	Description
Step Description	Depicts a process step or interface.
Batch Process	Specifies a batch process.
Manual Operation	Depicts a process or step that is performed manually.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.
Entity Name	Specifies an entity (person, organization, etc.).
Process	Depicts a process.
Start	Indicates point at which the process begins. Does not represent any activity.
End	Indicates point at which the process ends. Does not represent any activity.
Document	Depicts a document of any kind, either electronic or hard copy
X	Indicates an On-Page or Intra Process Connector which is used to avoid complex overlapping connector lines or to continue a process on another page.
Budget YE Close GL	Connects steps between business processes.