TA364: Time & Attendance Timekeeper Processing

Instructor Led Training

Revised 1/28/2013

Welcome

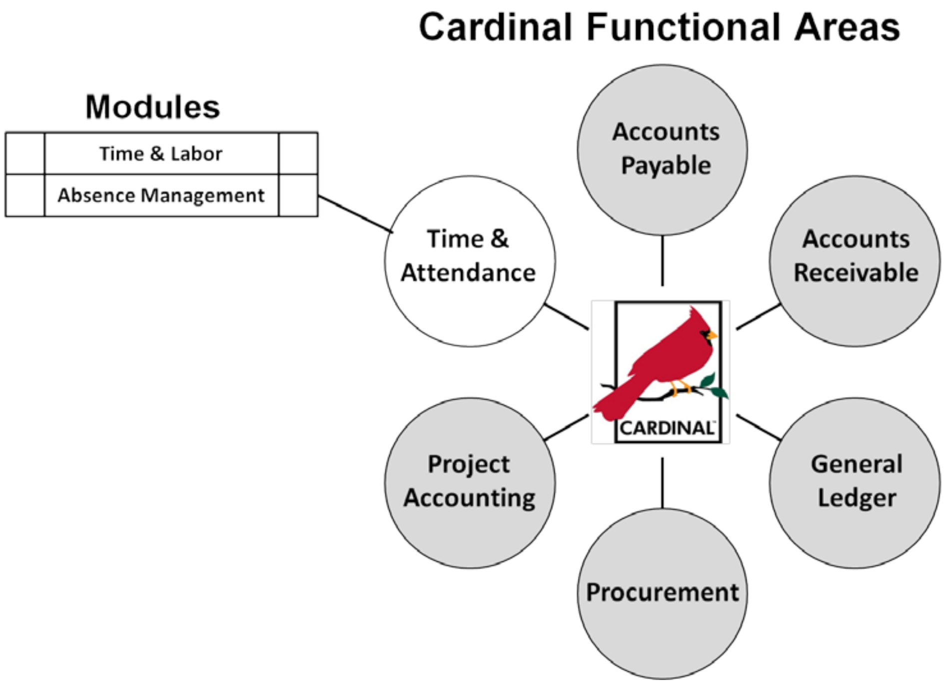
This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course, we will show you how to report and manage time and absences for other employees 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 Introduction to Cardinal course, you learned that the Time & Attendance functional area of Cardinal is composed of two modules:



<u>Time & Labor</u>

The Time & Labor module involves employee setup, input of time and attendance, payroll integration and cost allocation.

<u>Absence Management</u>

The Absence Management module involves the processing and managing of employee absences.

Course Objectives

After completing this course, you will be able to:

- Understand key concepts related to Time & Attendance
- Enter time worked
- Enter absence requests
- Make timesheet adjustments
- Manage timesheet exceptions
- Access timesheet reports and online inquiries

Course Agenda

The following lessons are contained within this course:

- Lesson 1: Understanding Time & Attendance
- Lesson 2: Entering Time, Overtime, Compensatory and Overtime Earned and Taken, and Holidays / Office Closings through Manager Self Service
- Lesson 3: Entering and Managing All Other Absences through Manager Self Service
- Lesson 4: Managing Exceptions
- Lesson 5: Performing Timesheet Adjustments
- Lesson 6: Timekeeper Reports and Online Inquiries
- Lesson 7: Timekeeper Processing Hands-On Practice (Lessons 2-4 and 5-6)

Lesson 1: Understanding Time and Attendance

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

- Key Concepts
- Time & Attendance Process
- Integration and Interfaces

Key Concepts

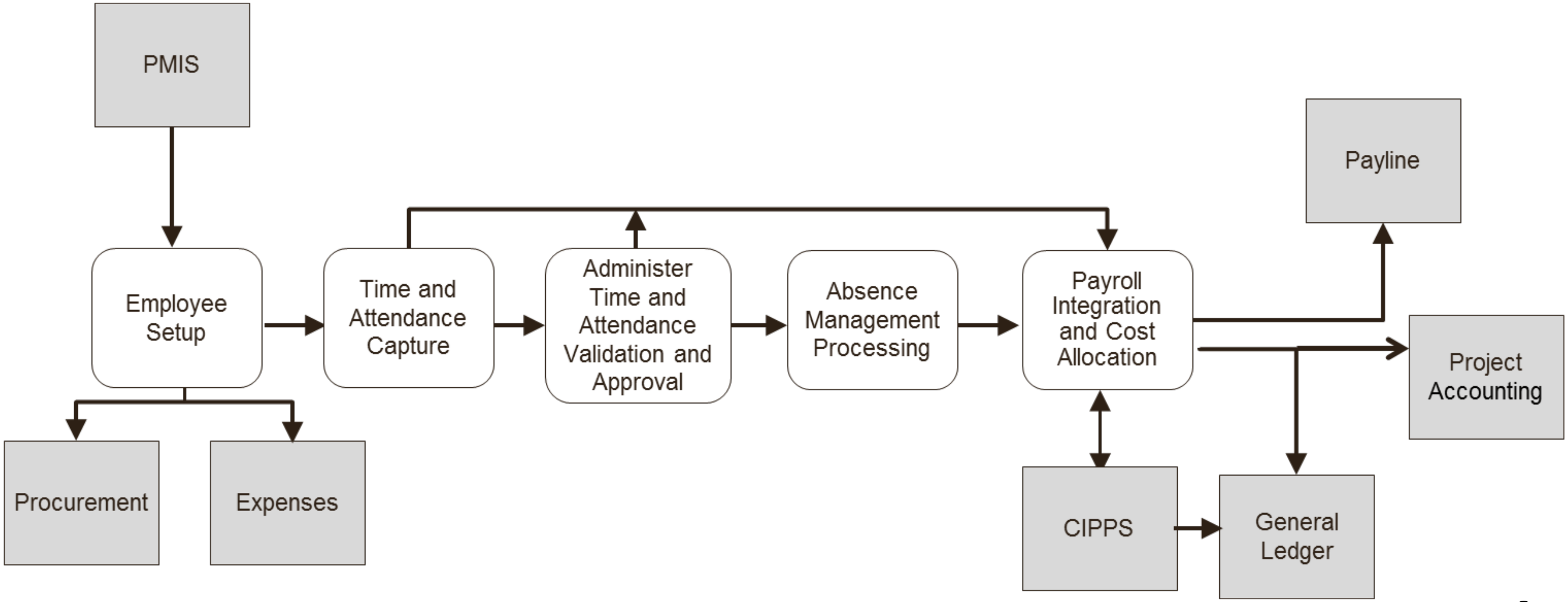
Some key concepts in Time & Attendance Manager Self-Service/Timekeeper Processing include:

- Every employee has a work schedule in Cardinal.
- Hourly employees have a work schedule with zero hours.
- The timesheet displays in a weekly format.
- Timekeepers enter hours worked each day by Time Reporting Code and charge distribution.
- SpeedTypes should be used to populate some ChartFields values.
- Absence requests can be entered based on a forecast of your projected future absence entitlement balance, however, should be reconfirmed to ensure the time is still available prior to use.
- Absence requests consist of only one absence type and one specific absence period.
- The Time Administration process in Cardinal identifies exceptions (warnings or errors) for submitted time that does not meet defined business rules.
- Adjustments to time and absences can be made going back to the beginning of the fiscal year.

Time & Attendance Process

Time & Attendance includes five sub processes:

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



Employee Setup and Time and Attendance Capture

Employee Setup

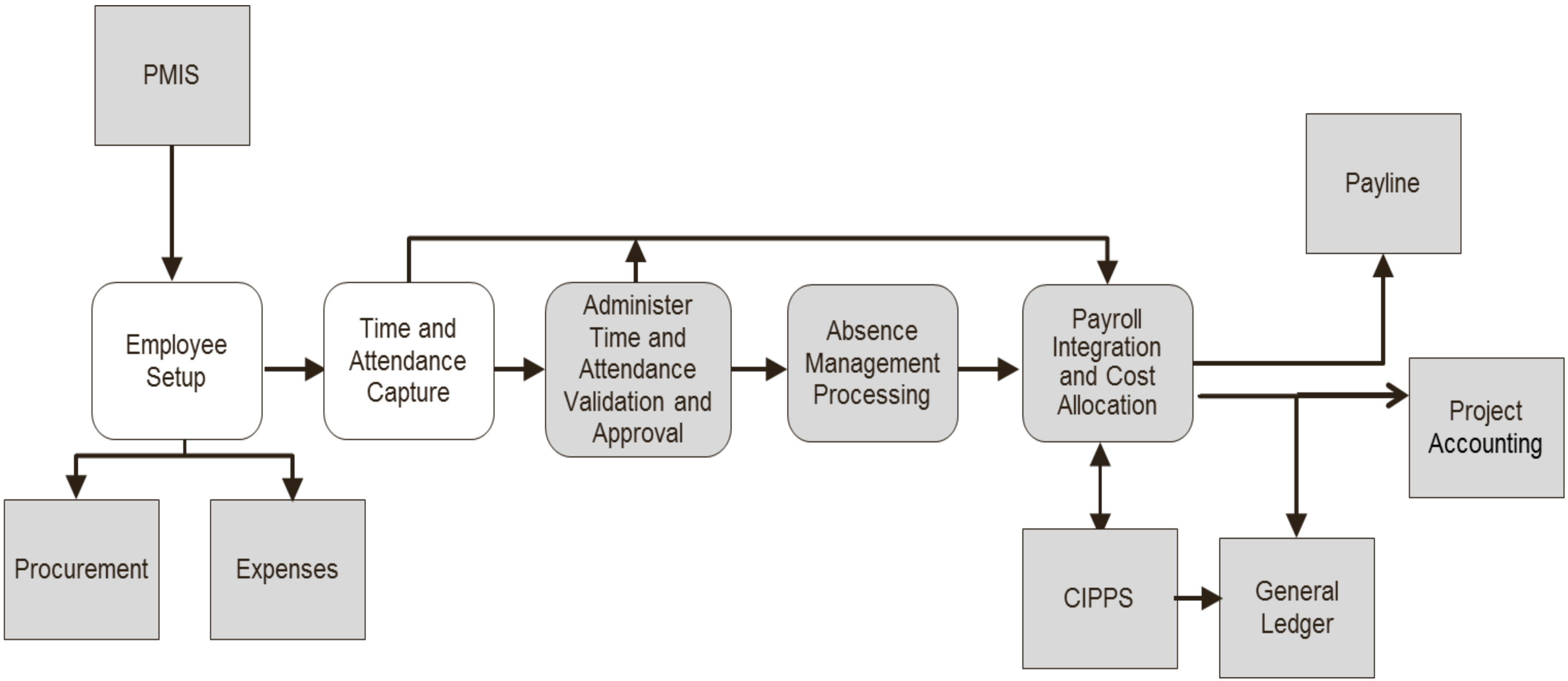
Most position and employee data is loaded into Cardinal from the Personnel Management Information System (PMIS) daily. If the data is incorrect, it must be corrected in PMIS so it can be updated in Cardinal.

Time and Attendance Capture

Employee time is captured on a **Timesheet** page in Cardinal. All employees with access to Cardinal are self-service users, i.e. can enter their own time. Timekeepers are able to enter time and absence requests on behalf of other employees, which is then processed by Cardinal and routed for approval.

As a Timekeeper, you can enter time and absences on behalf of other employees on an individual timesheet through Manager Self Service.

Employee Setup and Time and Attendance Capture (continued)

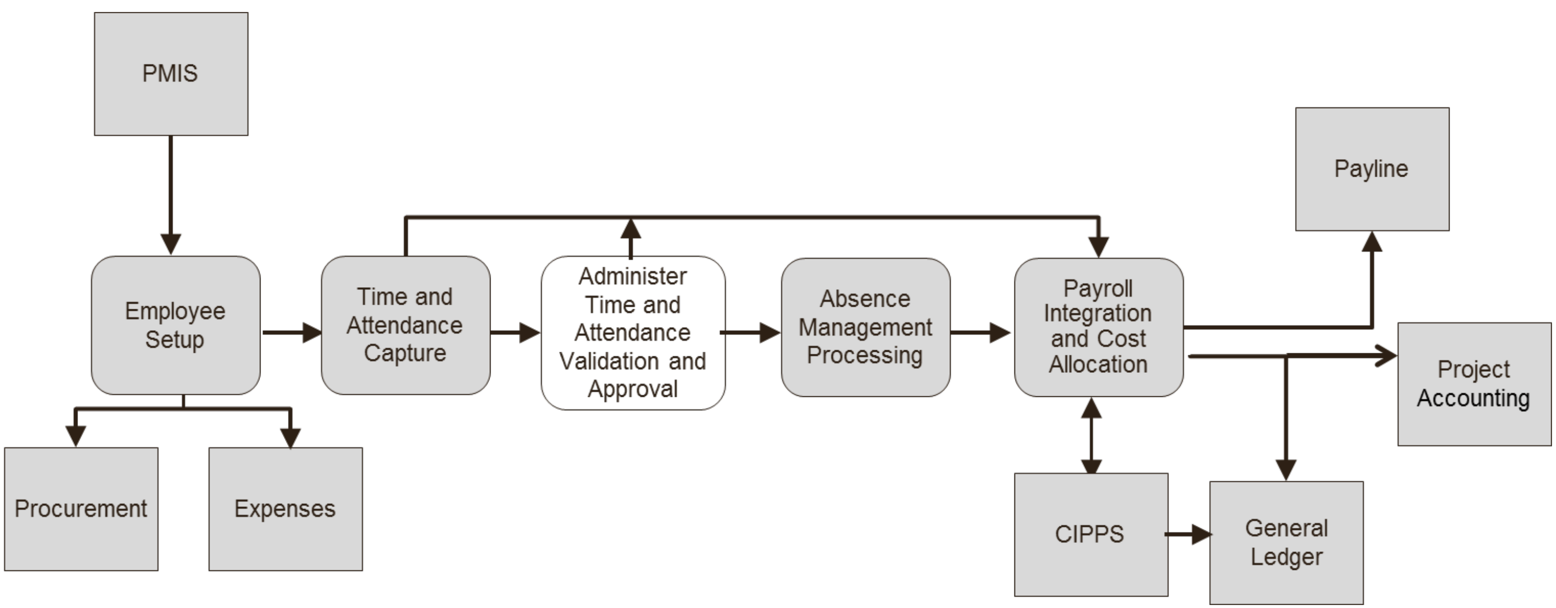


Administer Time and Attendance Validation and Approval

Once you enter time, in the timesheet grid, and submit it, it goes through Time Administration, a batch process that validates the time entered. The Time Administration process does the following:

- Validates submitted time against business rules.
- Identifies and/or corrects exceptions (errors in submitted time).
- Creates payable time and sends it to the supervisor for approval.

As a Timekeeper, you can run exception reports and make timesheet corrections to address certain types of exceptions that are identified during this process.



Absence Management Processing and Payroll and Cost Allocation

Absence Management Processing

As a Timekeeper, you can also manage absence requests on behalf of other employees. You can:

- Enter and update absence requests.
- View absence entitlement balances.

Absence requests, entered in the **Absence Event** section of the **Timesheet** page, once submitted, route immediately to the employee's supervisor for approval. Note this does not include compensatory or overtime leave earned or taken. Once absences are entered, they post directly to the timesheet.

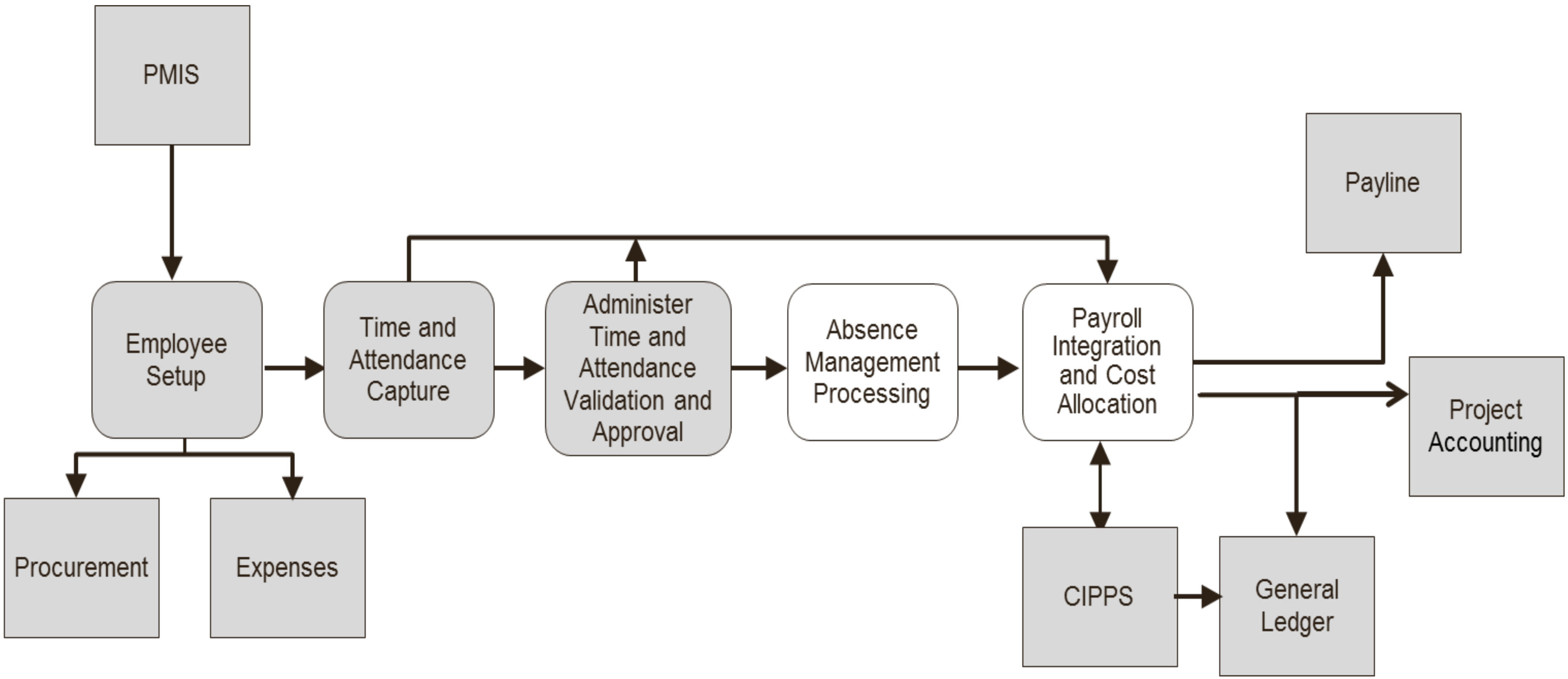
Note: Some absences require higher levels of review and approval (i.e. FMLA, Short / Long Term Disability and Workers Compensation).

Payroll Integration and Cost Allocation

Once employee time is reported, processed, and approved, the timesheet information is used to distribute the payroll costs:

- Payroll costs are posted to the General Ledger.
- Project related payroll costs are allocated to projects in Project Accounting.

Absence Management Processing and Payroll and Cost Allocation (continued)



Integration and Interfaces

Time & Attendance integrates with other Cardinal modules:

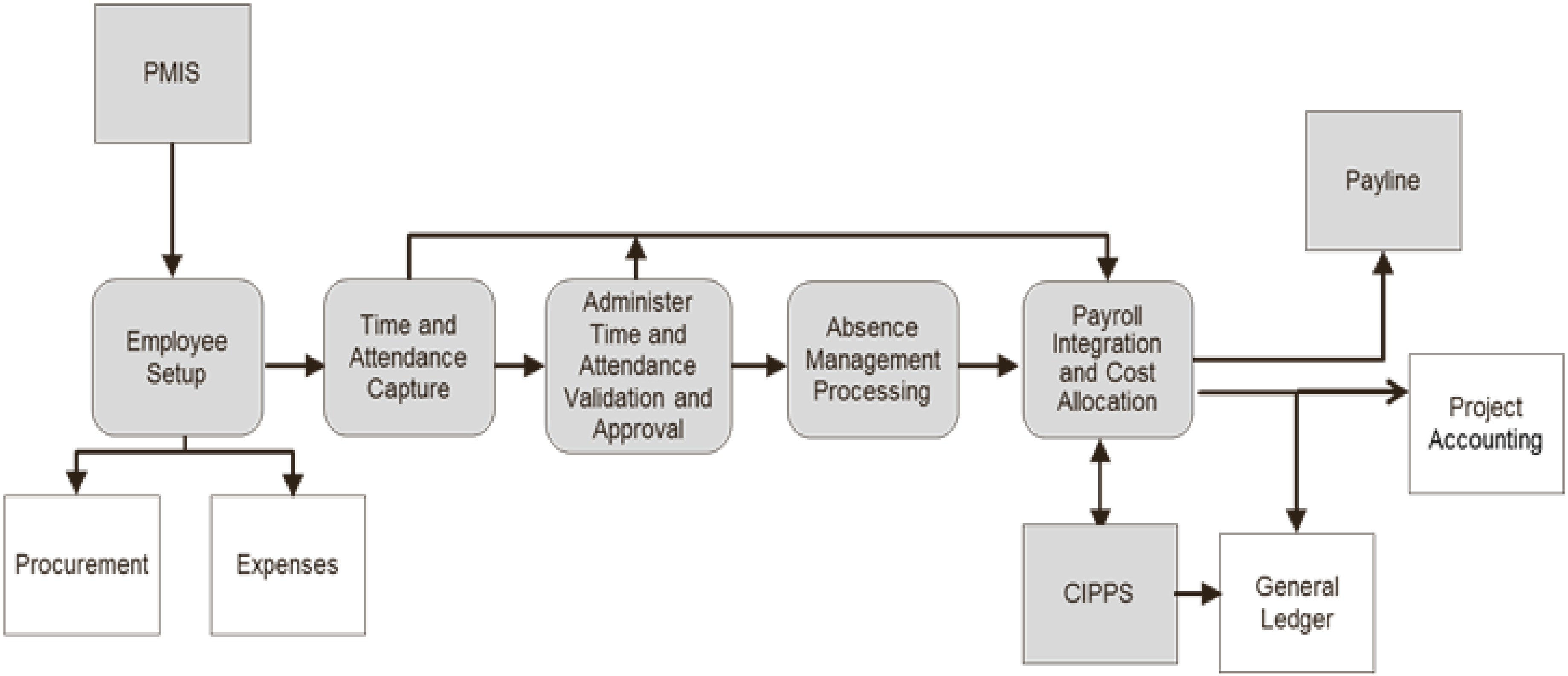
- **Procurement**: Employee information created during the Time & Attendance Employee Setup process is used by the Small Purchase Charge Card Program in the Procurement module.

- **Expenses**: Employee information 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.

Integration



Interfaces

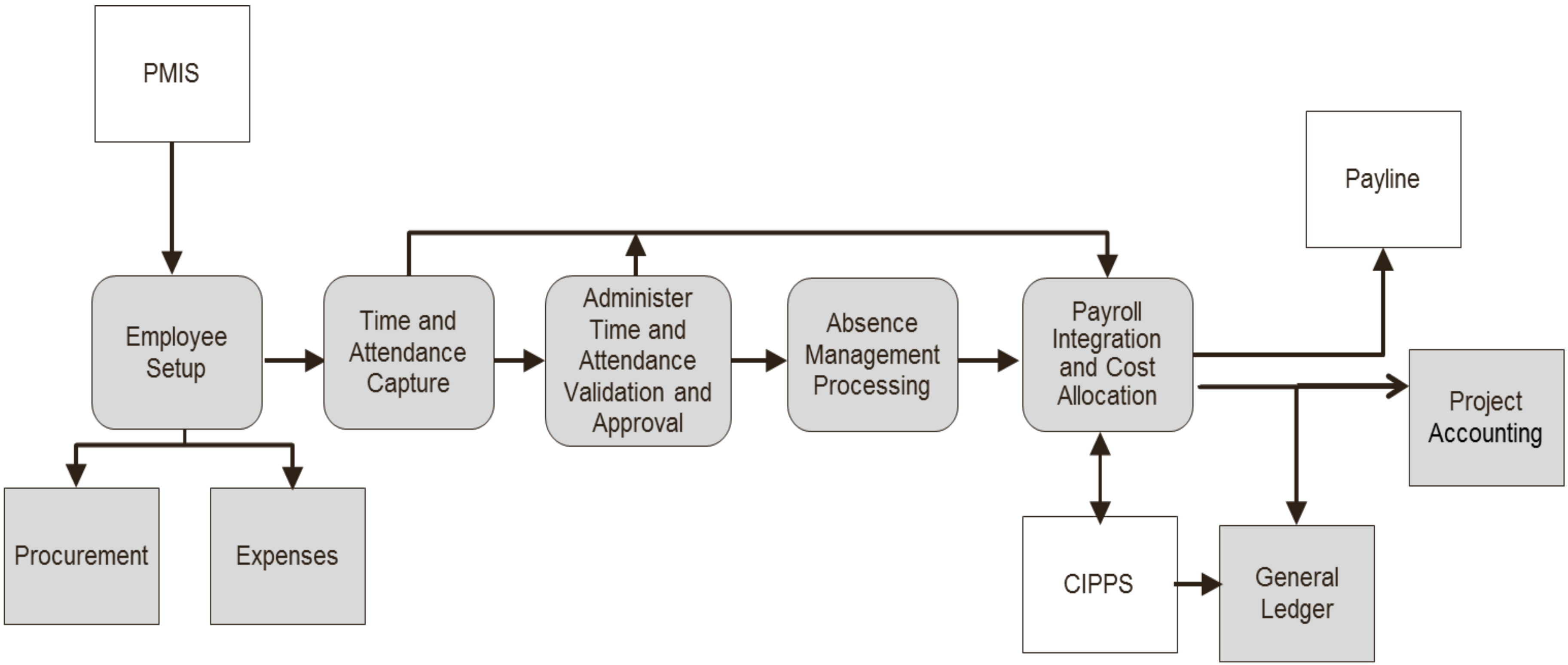
Time & Attendance also interfaces with several external systems:

- **Personnel Management Information System (PMIS**): When a new position is created or changed, position information is first entered into PMIS. PMIS then sends the information to Cardinal to establish Position Data in Cardinal Time & Attendance. When employees are added or updated, their personnel data is first entered into PMIS. PMIS then sends the employee information (employee name, address, role, hourly, salaried etc.) to Cardinal Time & Attendance to create an employee profile.

- **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. After the payroll process is complete, CIPPS provides earnings information to Cardinal. This information is then used by Cardinal along with employee timesheet charge distribution information to allocate labor costs.

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

Interfaces (continued)



Lesson 1: Checkpoint

Answer the review questions below:

1. What is the system that feeds employee data into Cardinal?
2. Name two other areas in Cardinal that use data from Time & Attendance?
3. This person can enter and manage his/her own time.
4. This role enters time for other employees.
5. As a Timekeeper, are you able to adjust your assigned employees’ timesheets?
6. As a Timekeeper, you will handle entering time and _____ in Time & Attendance.
7. The timesheet displays in a _____ format.
8. Absence requests in Time & Attendance can span across a weekend or ________.
9. Everyone in Cardinal will have a _______ ___________ in Time & Attendance.

Lesson 1: Summary

In this lesson, you learned:

- Every employee has a work schedule in Cardinal.
- Adjustments to time can be made going back to the beginning of the current fiscal year.
- Time entered in the timesheet grid is not available for approval until it has been submitted and successfully processed through Time Administration.
- Supervisors cannot approve time until the Time Administration process validates submitted time.
- Absence entered in the absence section, posts directly to the timesheet grid and upon submission route to the supervisor for approval.

Lesson 2: Navigating and Entering Time

In this lesson, you will learn about the following topics

- Navigating to the **Timesheet Summary** Page
- Selecting Individual Employees for Time Entry
- Entering Time on the Timesheet
- Entering and Viewing Compensatory and Overtime Earned or Taken
- Entering Holidays and Office Closings

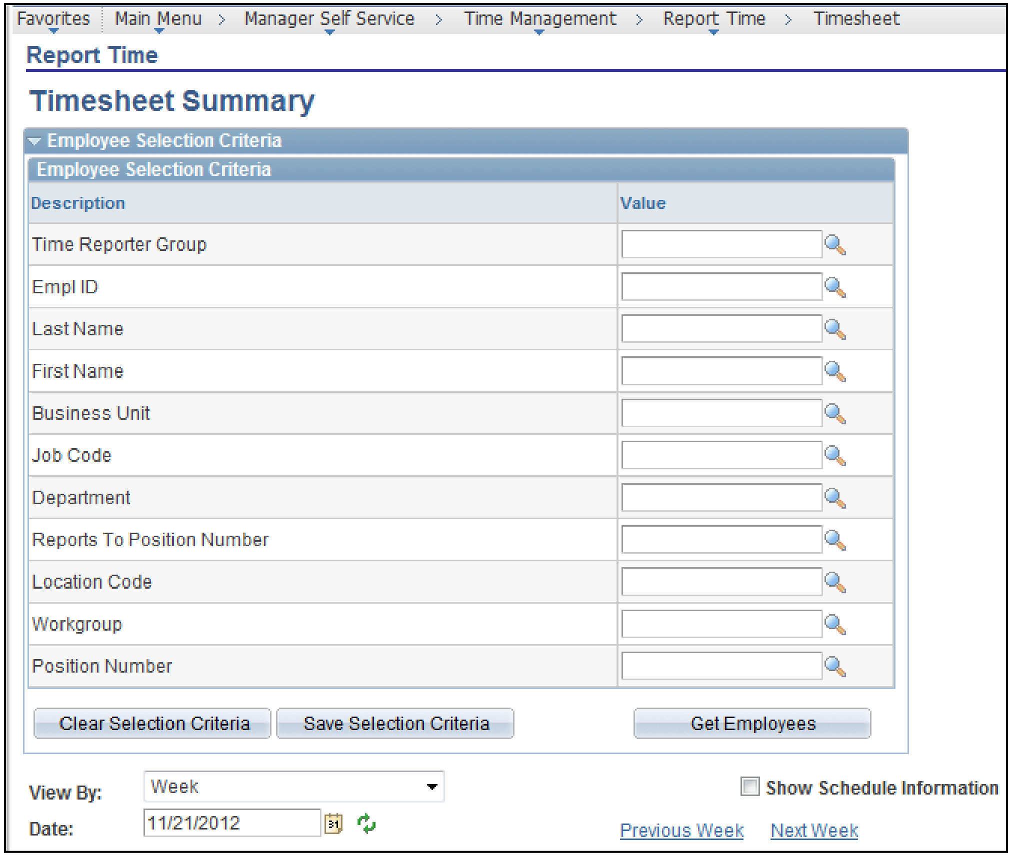
Navigating to the Timesheet Summary Page

Time & Attendance is the functional area in Cardinal where you enter time and absence requests for employees, e.g., regular hours worked, overtime compensatory time earned and taken, sick, vacation, leave without pay, etc.

Accessing Manager Self Service

As a Timekeeper, you can navigate to the **Timesheet** page using the following path:

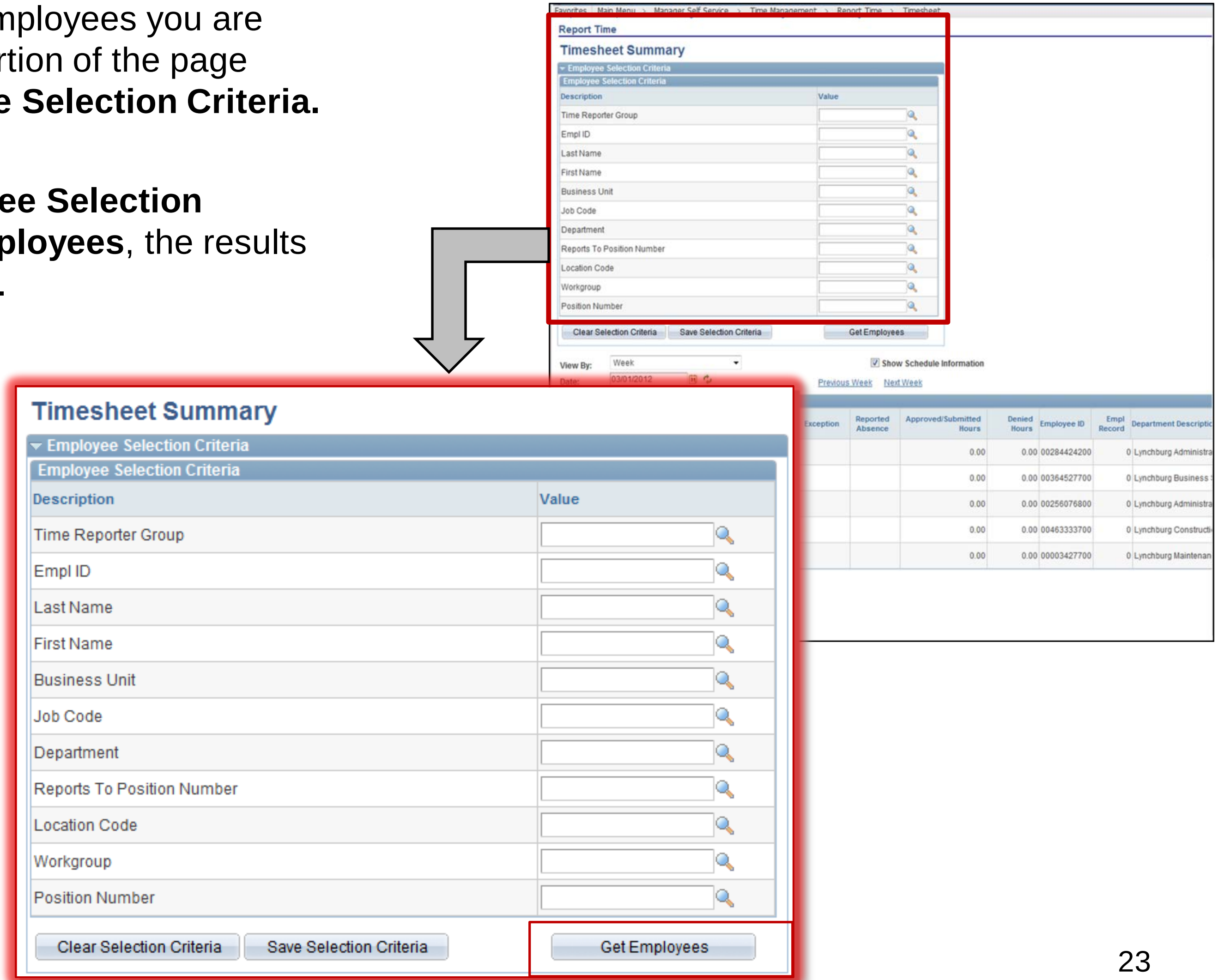
Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Report Time > Timesheet



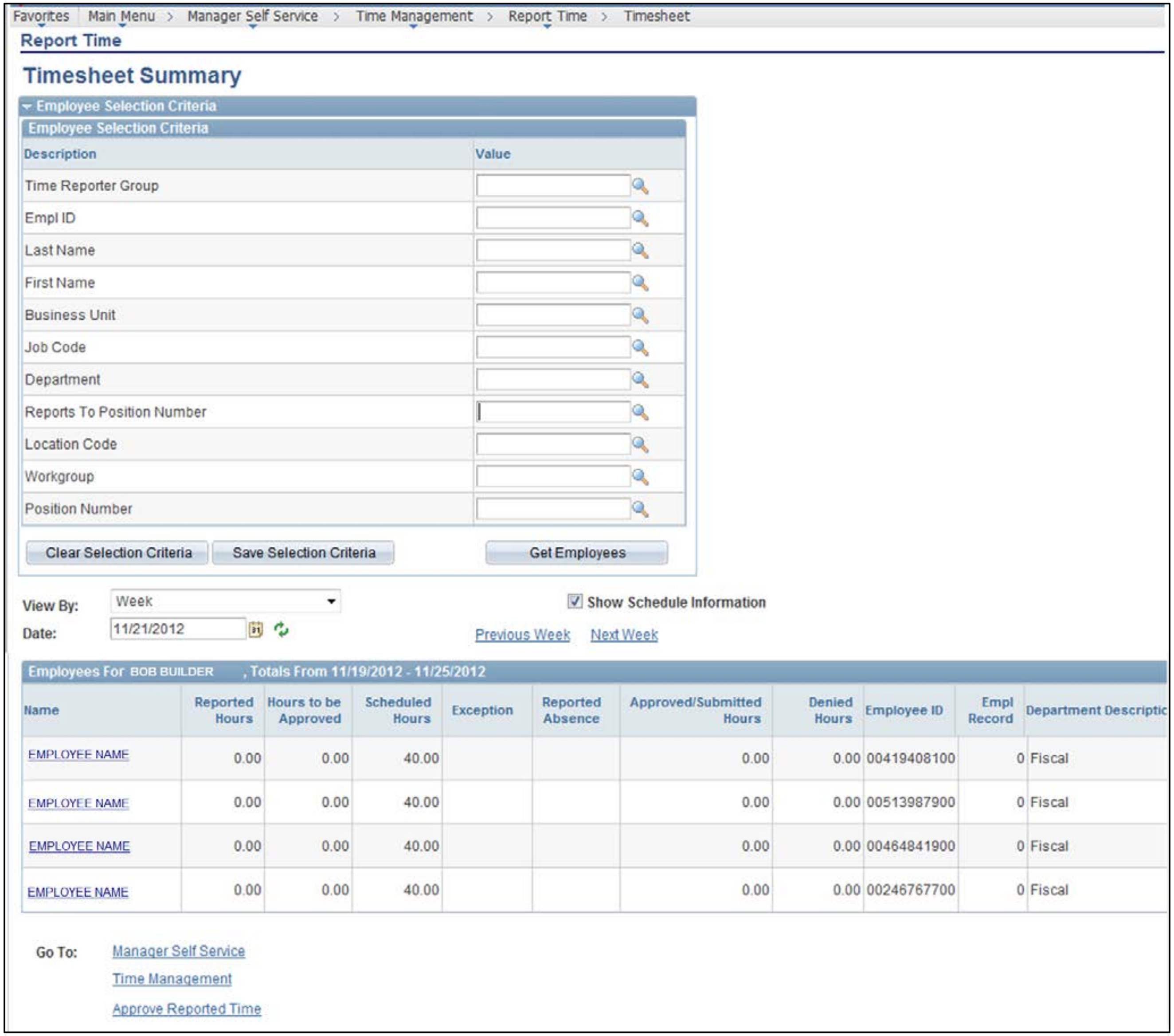
Reviewing the Timesheet Summary Page

Use this page to select the employees you are entering time for. The top portion of the page allows you to enter **Employee Selection Criteria.**

Once you enter your **Employee Selection Criteria** and click on **Get Employees**, the results of your search display below.



Timesheet Summary Page



Favorites > Main Menu > Manager Self Service > Time Management > Report Time > Timesheet

Report Time

Timesheet Summary

Employee Selection Criteria

Employee Selection Criteria

Description	Value
Time Reporter Group	
Empl ID	
Last Name	
First Name	
Business Unit	
Job Code	
Department	
Reports To Position Number	
Location Code	
Workgroup	
Position Number	

Clear Selection Criteria | Save Selection Criteria | Get Employees

View By: Week

Date: 11/21/2012

☑ Show Schedule Information

Previous Week Next Week

Employees For BOB BUILDER , Totals From 11/19/2012 - 11/25/2012

Name	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Record	Department Descriptic
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00419408100	0	Fiscal
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00513987900	0	Fiscal
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00464841900	0	Fiscal
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00246767700	0	Fiscal

Go To: Manager Self Service

Time Management

Approve Reported Time

Employee Selection Criteria

You can use various fields in the **Employee Selection Criteria** section:

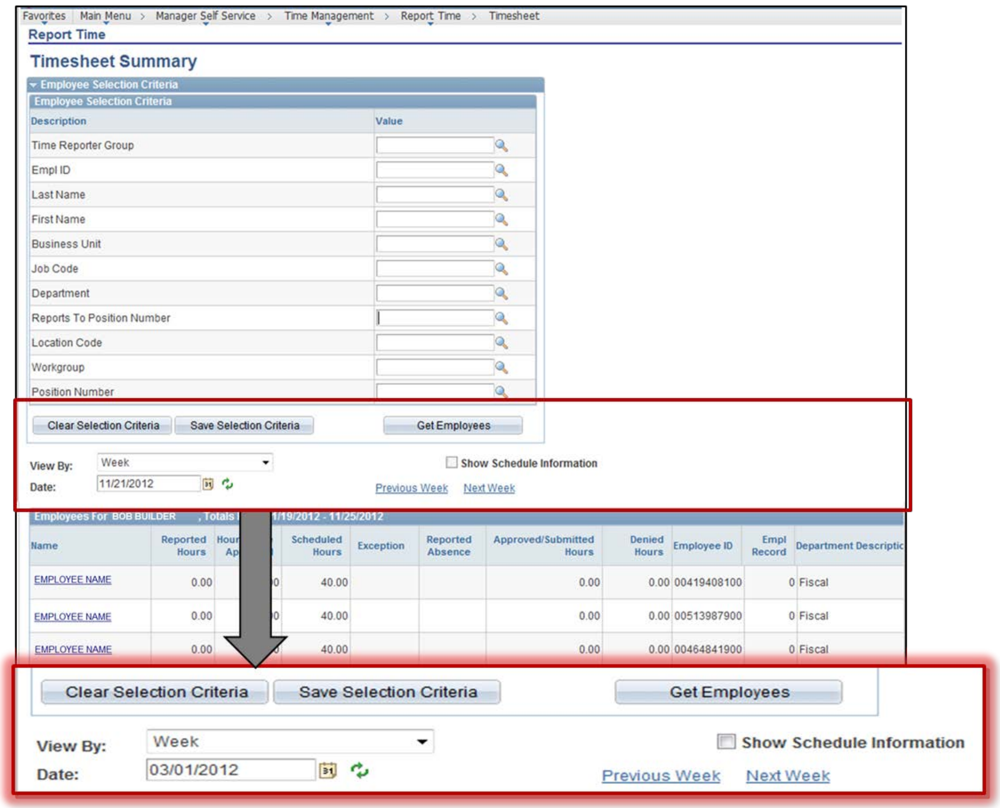
- **Time Reporter Group:** This selection criteria has three options for VDOT which are:
  - **VDOTALL** – All active VDOT employees
  - **VDOTHRL** - All active VDOT hourly employees
  - **VDOTSAL** - All active VDOT salaried employees
- **Empl ID:** The unique ten digit HR ID number that identifies an employee.
- **Last Name:** Employee last name.
- **First Name:** Employee first name.
- **Business Unit:** Number assigned to each Commonwealth agency. The **Business Unit ID**: VDOT is ***50100.***
- **Job Code:** Code associated with the job role.
- **Department:** The unique ID assigned to individual departments within the agency. The **Business Unit** field must be filled in for this option to work.
- **Reports To Position Number:** Selects employees who report to the person currently in a position.
- **Position Number:** Unique number that identifies a position.

Employee Selection Criteria (continued)

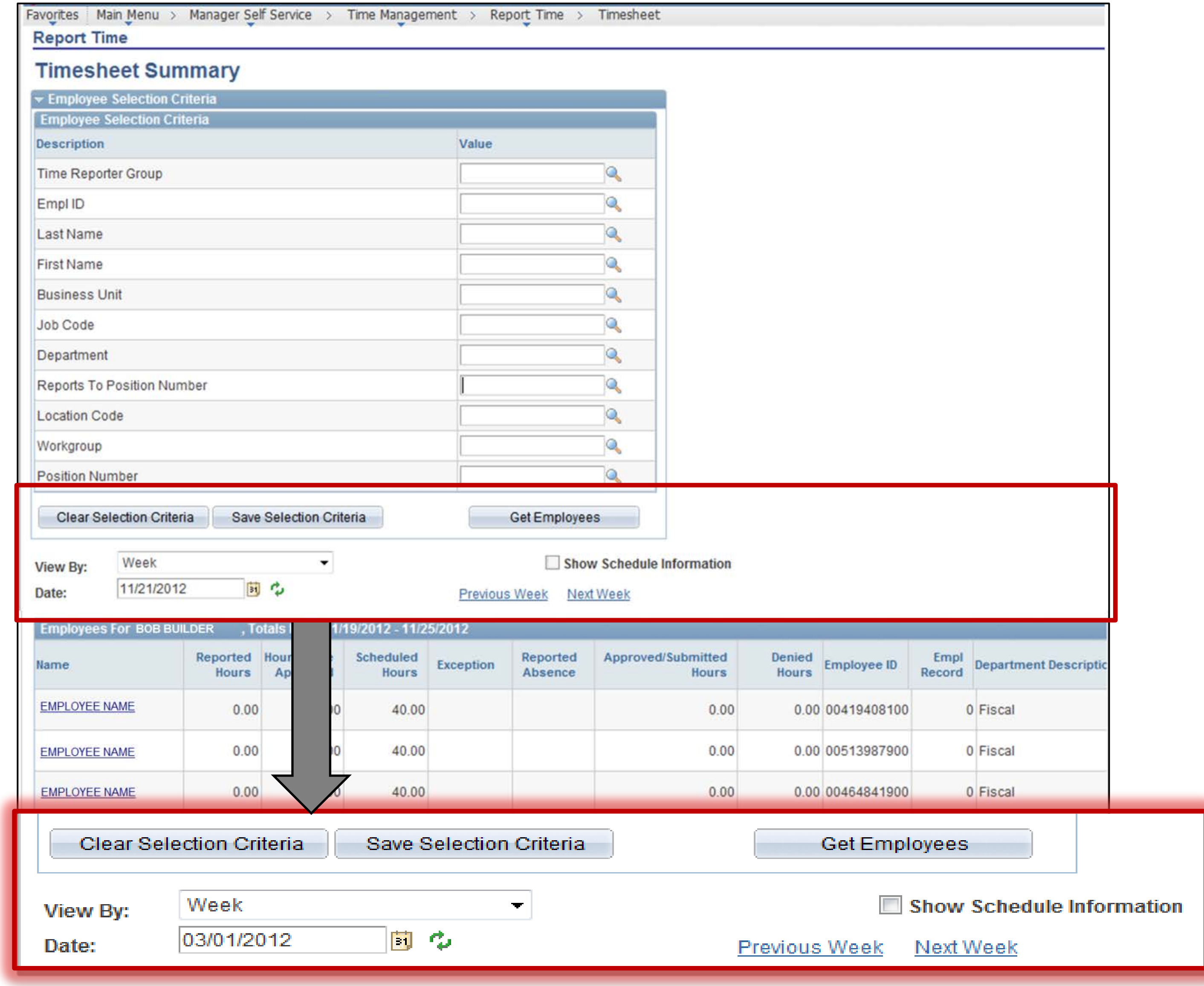
- **Location Code:** Field that defines the employee's District / Central Office. The **Business Unit** field must be filled in for this option to work.
- **Workgroup:** A means of classifying employees based on the TRCs you can enter on their timesheet:
  - **VDOTEMHRLY** – VDOT Emergency Hourly
  - **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
- **Position Number:** Unique number that identifies a position.

Employee Selection Criteria (continued)

- **Clear Selection Criteria:** Allows you to clear any criteria you have entered.
- **Save Selection Criteria:** Saves the selection criteria you have entered. The criteria will be populated the next time you access the page.
- **Get Employees:** Pulls employees based on the selection criteria you entered.
- **View By:** Shows results for an individual day or for an entire week. The default value for this field is "Week."
- **Show Schedule Information:** Displays the employee's scheduled days and hours when the indicator is checked.
- **Date:** Is driven by the selection made in the **View By** field. If you choose day, then the date should be the day you want to view. If you choose week, then the date can be any date in that week. The default value for this field is the current date.



Employee Selection Criteria (continued)

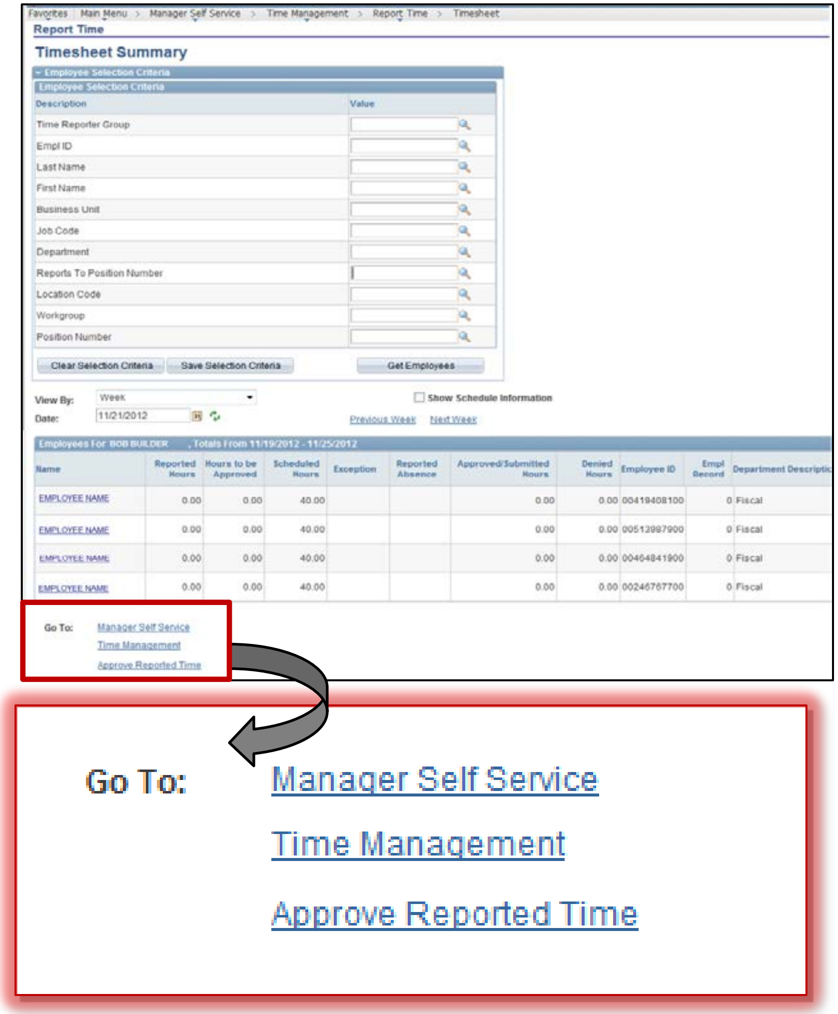


Employee Selection Criteria (continued)

After you enter employee selection criteria and click the **Get Employees** button, the bottom half of the **Timesheet Summary** page populates with the employee(s) that fit your search criteria.

The bottom of the **Timesheet Summary** page contains three additional links:

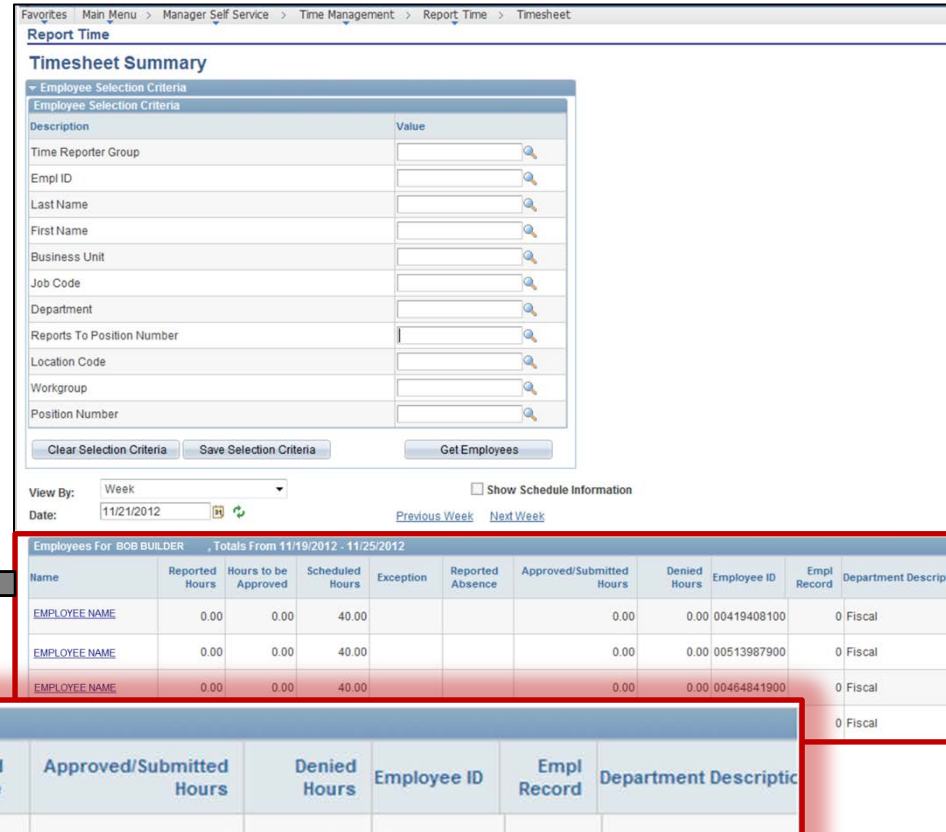
- **Manager Self Service** – This link takes you to the **Manager Self Service** page.
- **Time Management** – This link takes you to the **Time Management** page.
- **Approve Reported Time** – This link takes you to the **Approve Time** page. Timekeepers will not have access to this page and receive an error message when clicked.



Employee Selection

Enter the employee selection criteria and click the **Get Employees** button. A list of employee names displays at the bottom of the page based on the criteria you entered.

To report time for an employee, click the employees name from the list that you wish to report time by clicking the name. This will open the **Timesheet** page for the selected employee.



Employees For BOB BUILDER , Totals From 11/19/2012 - 11/25/2012

Name	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Record	Department Descriptic
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00419408100	0	Fiscal
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00513987900	0	Fiscal
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00464841900	0	Fiscal
EMPLOYEE NAME	0.00	0.00	40.00			0.00	0.00	00246767700	0	Fiscal

Timesheet Page Layout

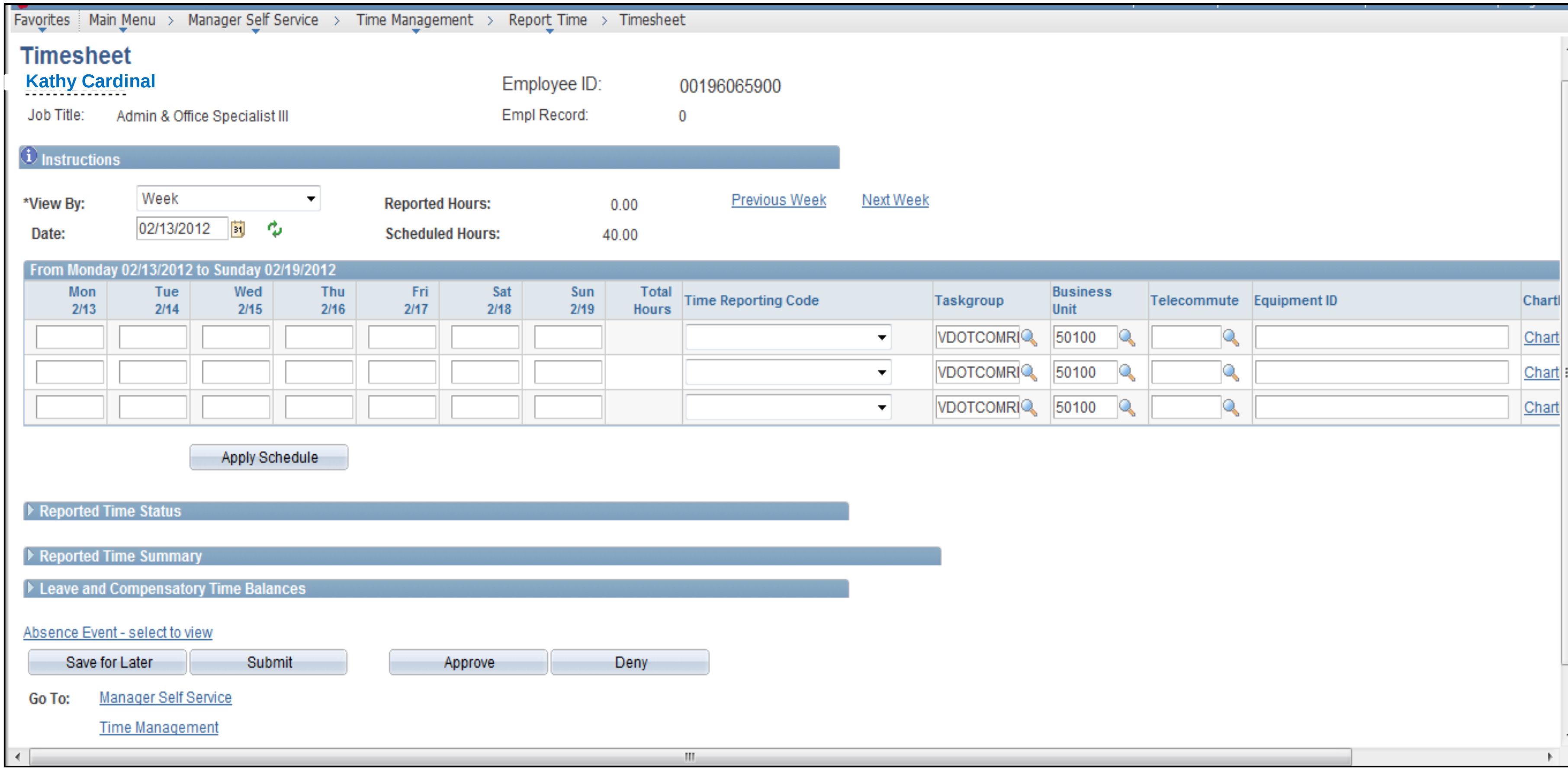
The **Timesheet** page is the same as it is for a Self Service user with the exception of the **Apply Schedule** button.

Header Section – The Header Identifies the employee by **Name**, **ID** and **Job Title**.

Instructions Section –

- **View By** – Allows you to view the timesheet by day, week or an alternative calendar period.
- **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 Page Layout (continued)



Timesheet Page Layout (continued)

From Monday – Sunday Section – This grid provides rows and columns for entering your hours by day, Time Reporting Code (TRC) and charge distributions. Once you complete this section, you can either **Submit** or **Save for Later**.

Apply Schedule button – This button auto populates the employee's timesheet with the schedule identified in Cardinal on the **Assign Work Schedule** page. Note: If **Apply Schedule** is used, the **Business Unit** values are removed. They must be re-keyed here or ChartFields do not pass edit.

Reported Time Section – Expand this section to view the regular, overtime and compensatory time you have entered by date and check on its status.

Reported Time Summary Section – Expand this section to view one row summary of your time.

Absence Event Section – Expand this section to enter absences, view details about outstanding absence requests and check absence entitlement balances.

Submitting Time on Individual Timesheet

Once you have finished entering time, you can **Save for Later** or **Submit**.

Time is not processed by Time Administration when the **Save for Later** button is selected. The **Submit** button triggers the time to be processed by Time Administration during the next batch process.

Time Administration will generate exceptions when it compares the time submitted to time reporting rules.

When you **Submit** time, it is only submitted for that current week of day, whatever is displayed based on the **View By** option that is selected.

Submitting time weekly is recommended; at the end of pay periods is required.

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 our 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:

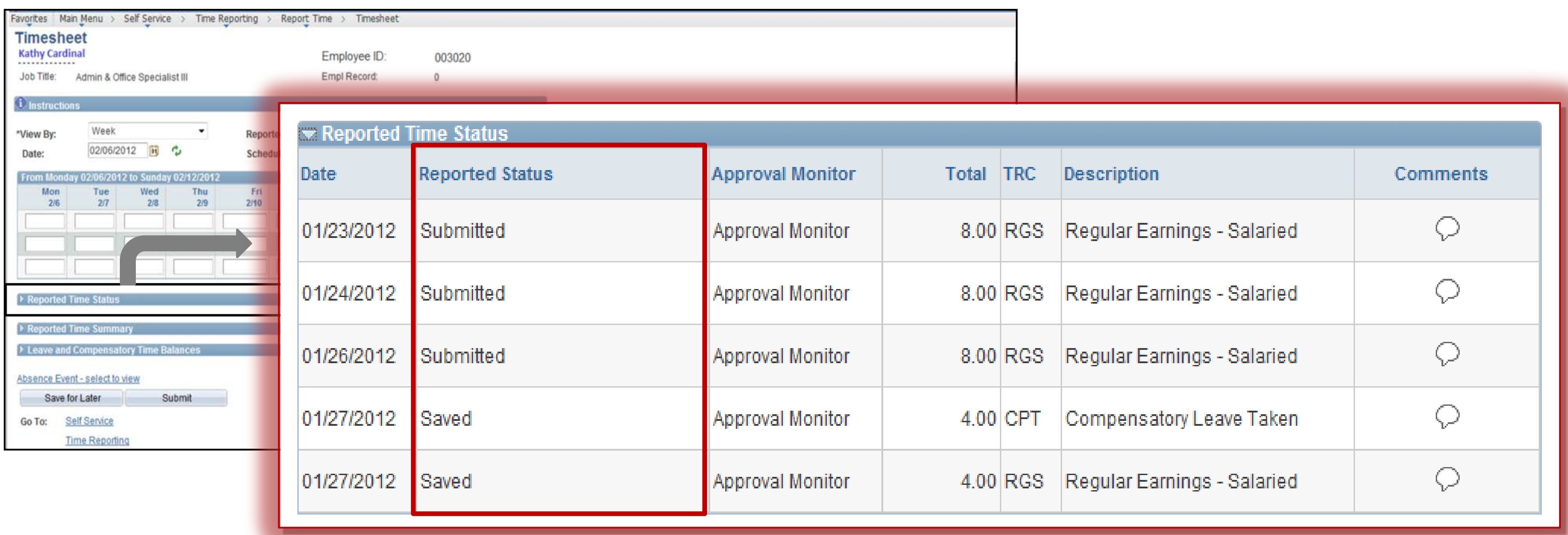
- No salaried timesheet entry / approval for that pay period
- No salaried timesheet entry / approval for prior period adjustments before that pay period
- Salaried timesheet entry / approval *is allowed* for pay periods subsequent (future) to the specific period under lockout

Viewing the Status of Time

You can determine if time has been **Saved** or **Submitted** on the **Timesheet** page. Click to expand the **Reported Time Status** section on the timesheet.

When time has been saved but not submitted it, the **Reported Status** field's value is "**Saved**". When time has been submitted, the Reported Status field's value is "**Submitted**".

The status on the **Timesheet** page in the **Reported Time Details** section, only reflects whether the time is either **Saved** or **Submitted**.



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	
01/26/2012	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 Time (continued)

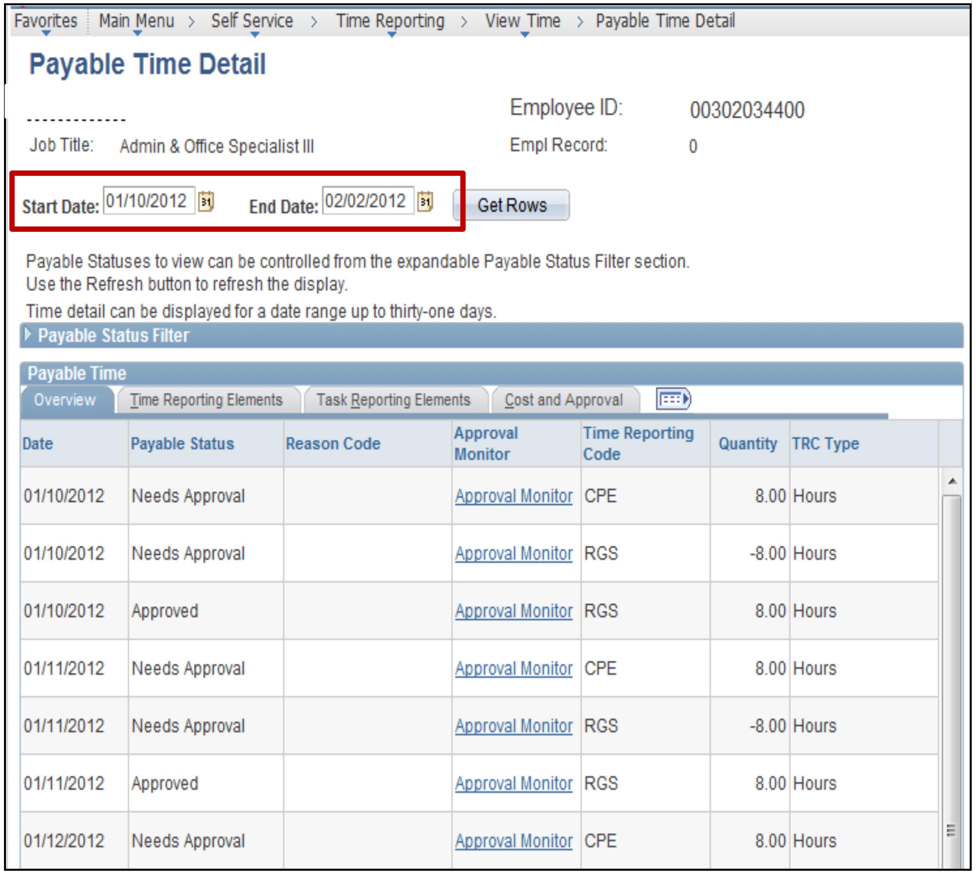
Once time is submitted and goes through the Time Administration process, it becomes payable routes to the supervisor for approval.

To view the approval status of payable time, access the following path:

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

This page allows you to view a date range of up to 30 days:

- Enter or select the **Start Da**te and **End Date**
- Click the **Get Rows** button



Viewing the Status of Time

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

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

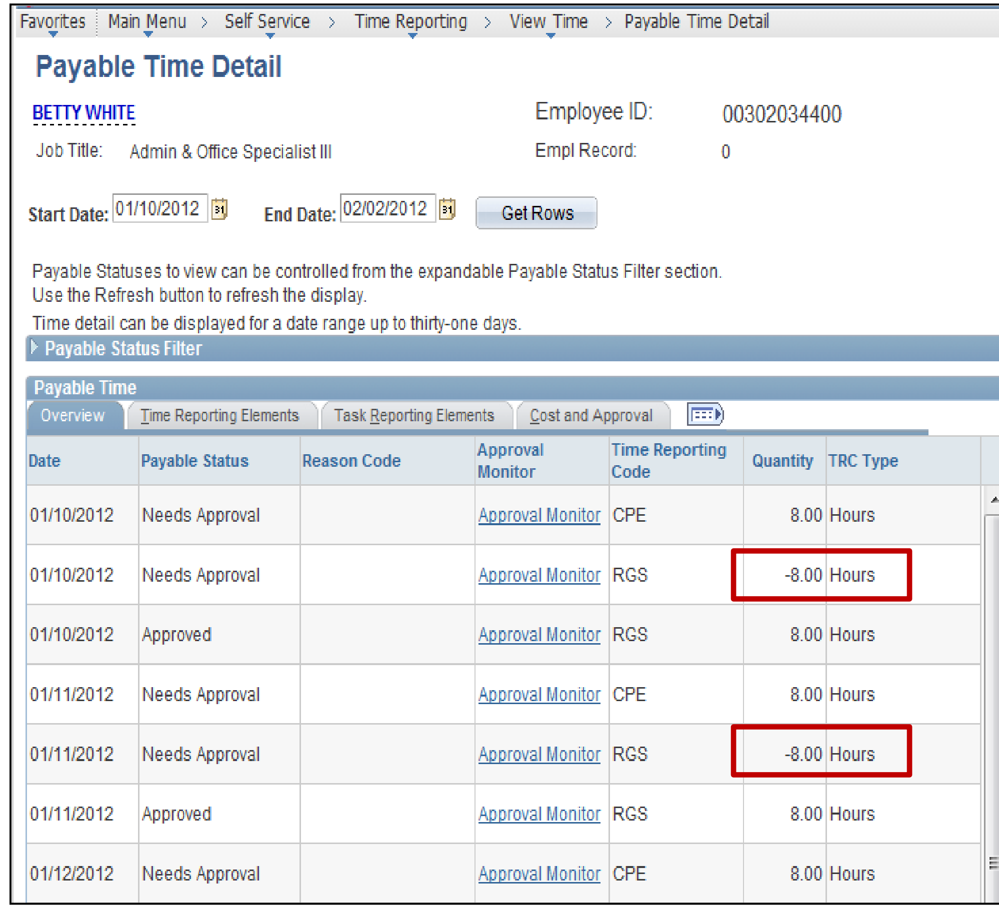
It can also display three statuses applicable to the allocation process:

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

Note: If you do not see payable time entries as expected on the Payable Time Detail page, check for high exceptions, as they do not generate payable time. See Lesson 5: Managing Exceptions for more information.

Negative Hours

Sometimes, you might see negative hours displayed on **Payable Time Detail** page even though Cardinal does not allow for negative entries. When an adjustment occurs after time has been submitted and approved, Cardinal generates negative entries as a way to offset the changes.



Simulation: Entering Time through Manager Self Service

You are now about to view a simulation on entering and submitting time on the individual employee timesheet.

Entering and Viewing Compensatory Time and Overtime

Compensatory and overtime earned and taken are recorded on the timesheet. Cardinal will only display TRCs that are available for employees. The TRCs for Compensatory and Overtime are:

- **CPE**: Compensatory Time Earned
- **ECP**: Emergency Compensatory Time Earned
- **CPT**: Compensatory Time Taken
- **OTL**: Overtime Earned
- **EOL**: Emergency Overtime Earned
- **OTT**: Overtime Taken

When compensatory and overtime leave are entered and submitted, they are processed by Time Administration and then route to the supervisor for approval. After is it approved by the supervisor the time is available for use.

Entering and Viewing Compensatory Time and Overtime (continued)

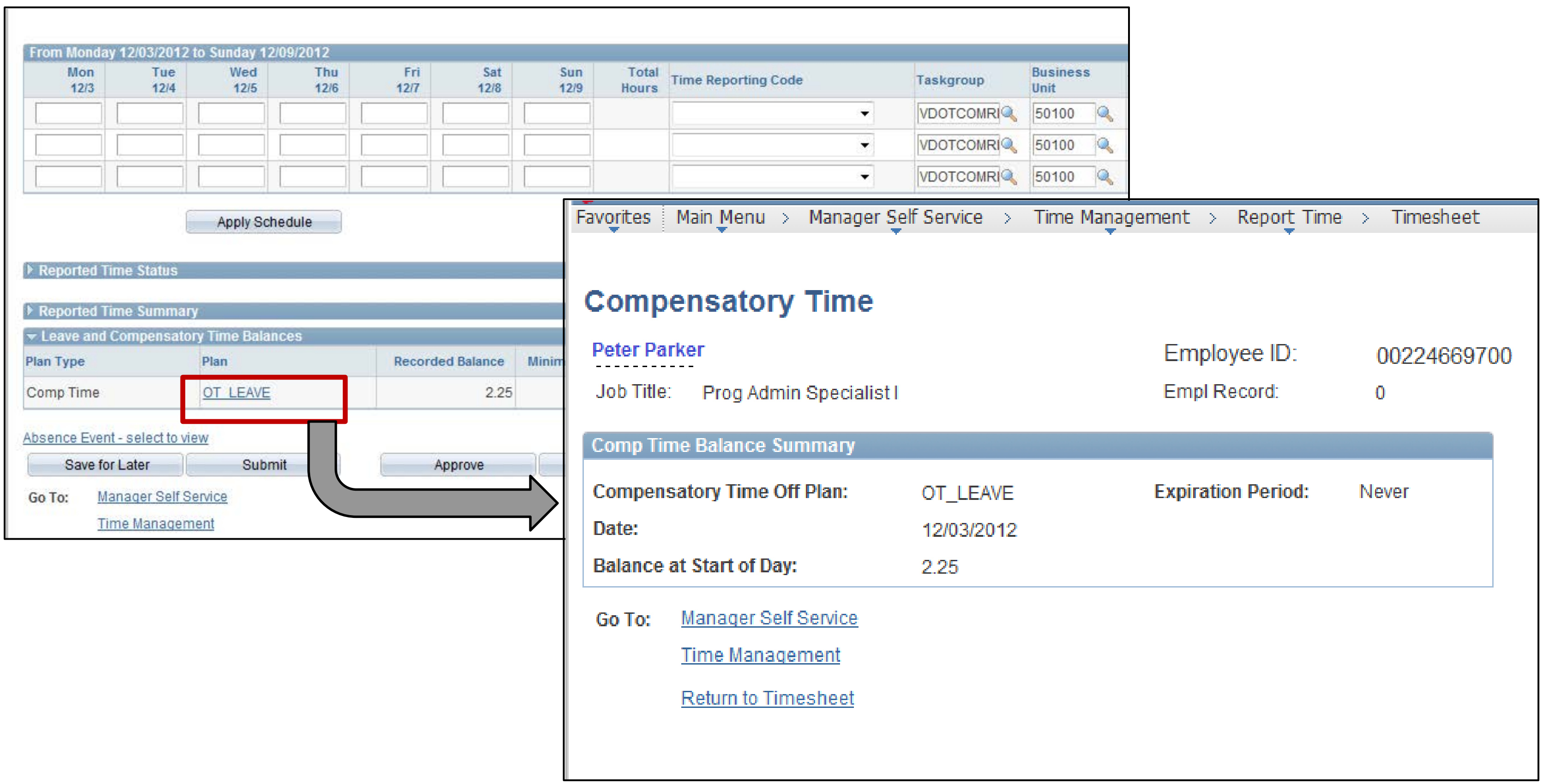
If you enter **CPT** or **OTT** for an employee and the balances are not sufficient, a warning message will appear.

When entering time using the **CPT** or **OTT TRC**, enter the hours and the appropriate **TRC**. Click the **ChartFields** link. Cardinal auto populates the charge distribution. Click the **Ok** button to return to the **Timesheet** page.

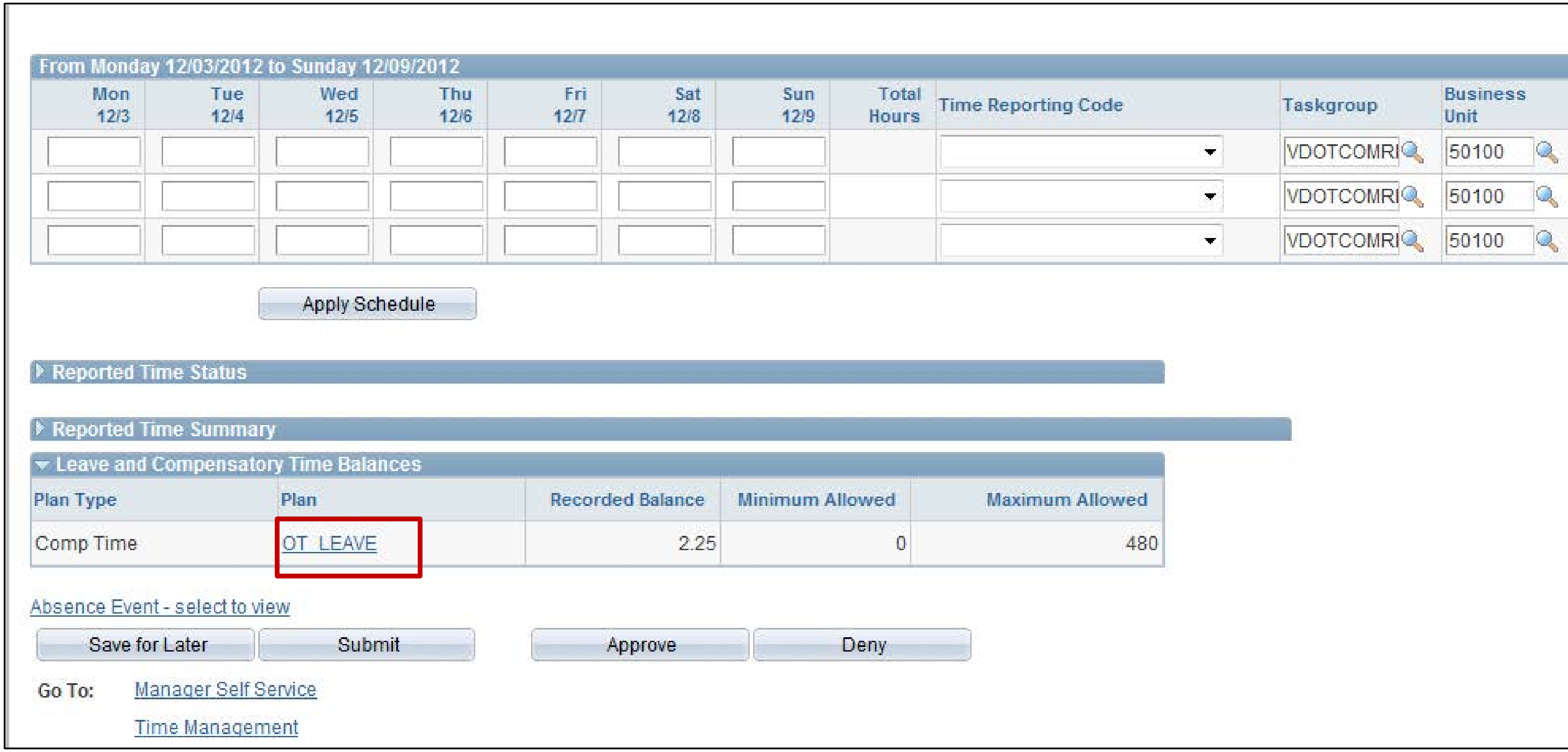
Refer to **Time Entry Scenarios Job Aid** for details about the charge distribution codes in Cardinal.

Viewing Absence and Compensatory Time Balances

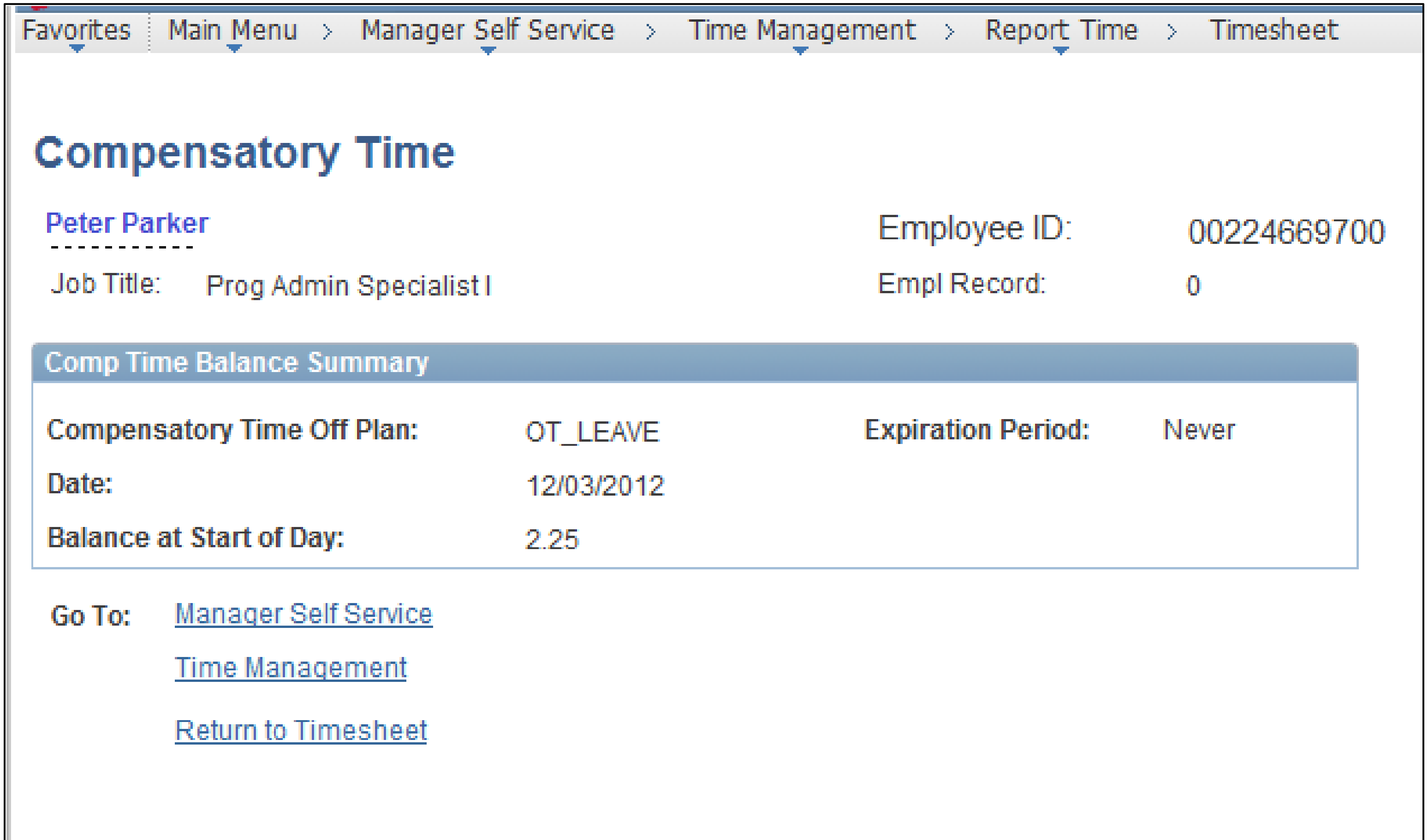
To view additional information, click to expand the **Absence and Compensatory Time Balances** section on the **Timesheet** page. This section is only available to those who are eligible for Compensatory or Overtime leave.



Viewing Absence and Compensatory Time Balances (continued)



Viewing Absence and Compensatory Time Balances (continued)



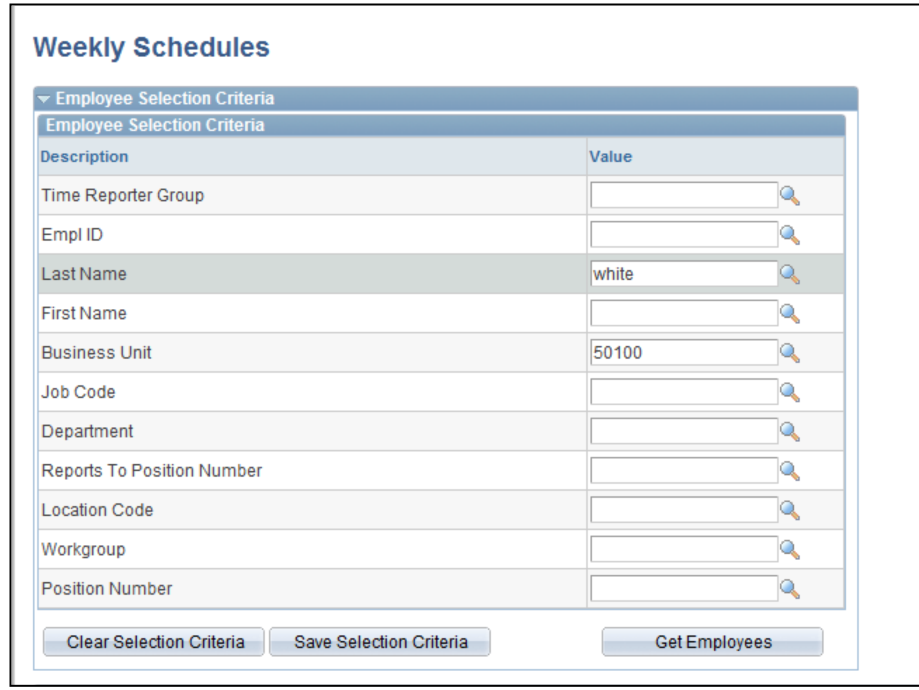
Entering Floating Holidays and Office Closings

Holidays are populated in payable time but <u>are not visible on the timesheet.</u>

Scheduled holidays can be viewed in Manager Self Service on the Manage Schedule page. It can be accessed using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Manage Schedules

This path opens the Weekly Schedules search page. Timekeepers enter the selection criteria for the employees they want to access. After entering criteria, click the **Get Employees** button to access the employees that match the criteria entered.


Weekly Schedules

Employee Selection Criteria

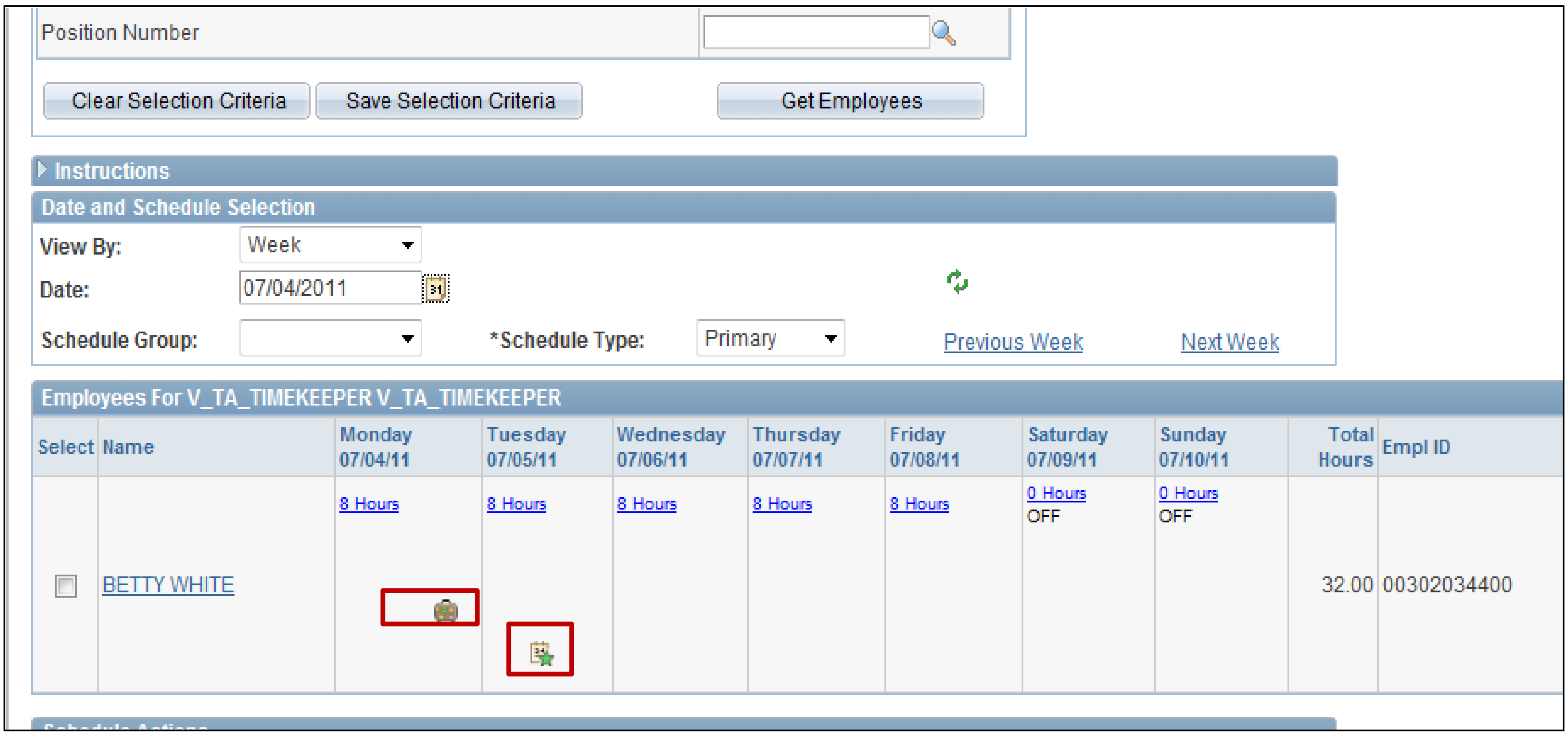
Employee Selection Criteria

Description	Value
Time Reporter Group	
Empl ID	
Last Name	white
First Name	
Business Unit	50100
Job Code	
Department	
Reports To Position Number	
Location Code	
Workgroup	
Position Number	

Clear Selection Criteria | Save Selection Criteria | Get Employees

Viewing Holidays and Planned Time Off

Holidays are shown with an image of a suitcase. If the employee has planned time off, an image with a calendar and a star displays.



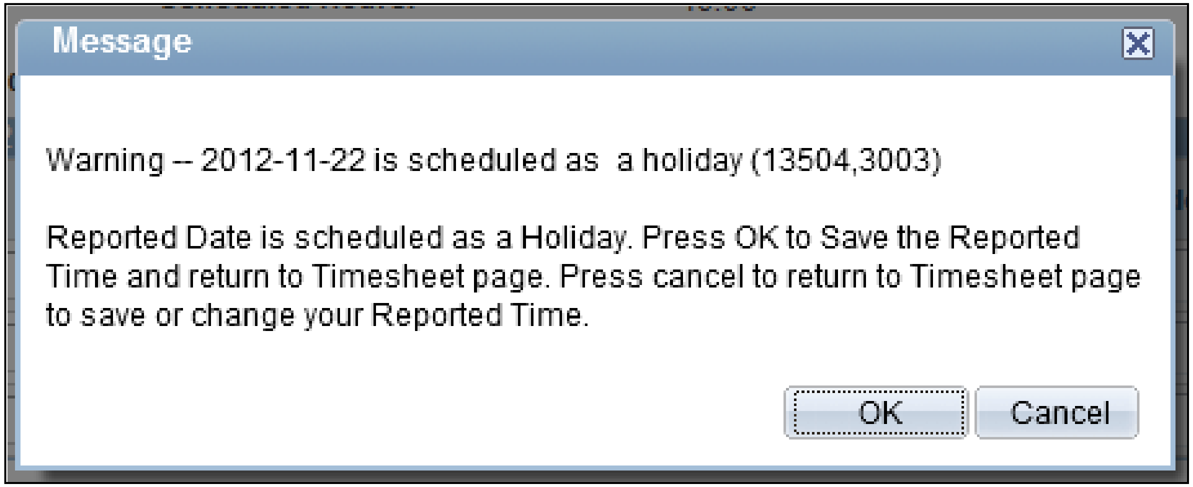
Entering Time Worked on a Holiday

When you report time for an employee on a holiday, Cardinal generates a warning message but does allow you to save the time.

When an employee works on a holiday and you need to record hours worked in addition to the holiday, you should enter the time on the holiday using either the OT1 or OS1 Time Reporting Code.

The holiday warning message displays when you either **Save** or **Submit** time.

In this case, click **OK** on the warning message and the time is recorded on the timesheet.



Using a Floating Holiday

Eligible employees who do not want to use the standard holiday and wish to utilize a floating holiday need to do the following on the standard holiday in Cardinal:

- 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 the **Ok** button to return to the **Timesheet** page.

The Time Reporting Code of **HFL** should be entered for the day you take the time for the floating holiday. After entering the **TRC**, click the **ChartFields** link and the charge distribution auto populates. Click the **Ok** button to return to the **Timesheet** page.

Note: Not every employee is permitted to take floating holidays. Confirm with the supervisor regarding eligibility.

Using a Floating Holiday (continued)

From Monday 11/12/2012 to Sunday 11/18/2012

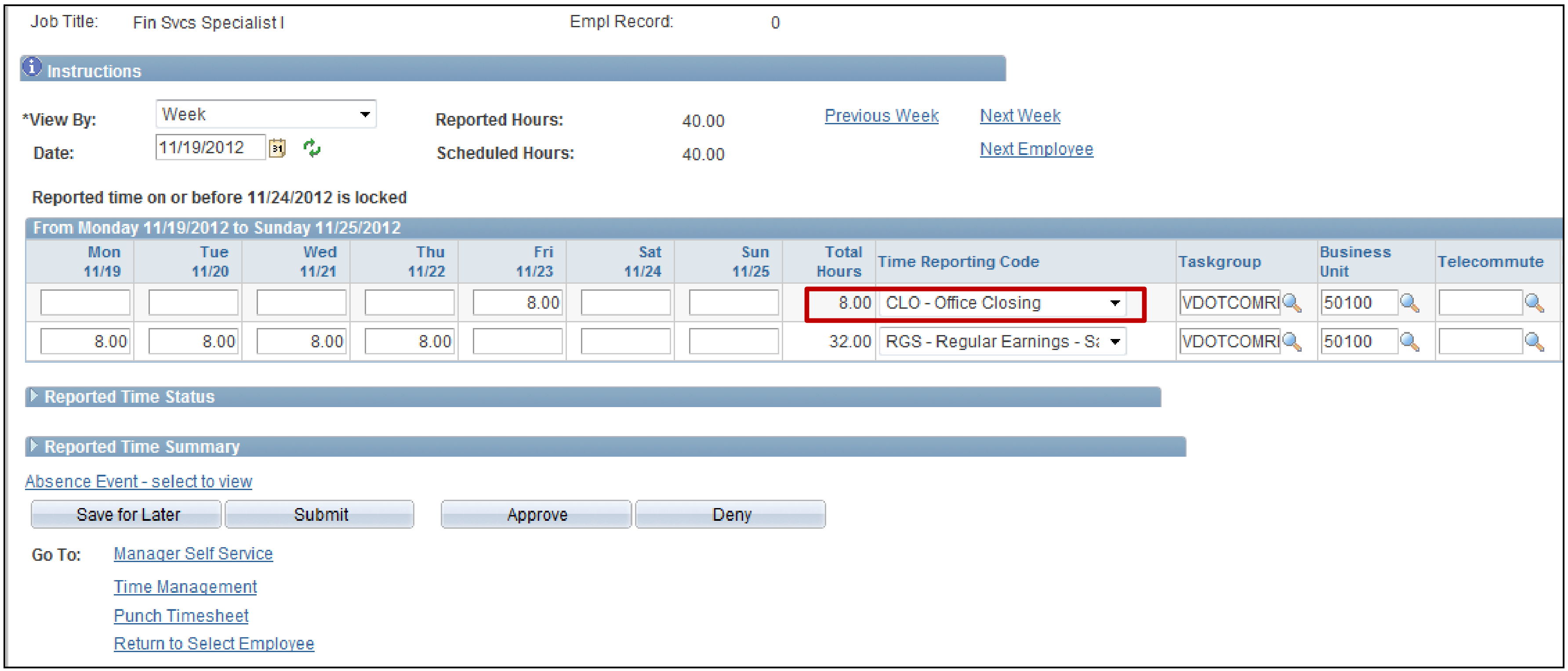
Mon 11/12	Tue 11/13	Wed 11/14	Thu 11/15	Fri 11/16	Sat 11/17	Sun 11/18	Total Hours	Time Reporting Code
8.00							8.00	NHO - No Holiday Pay
8.00	8.00	8.00	8.00	8.00			40.00	RGS - Regular Earnings - Sa

From Monday 11/12/2012 to Sunday 11/18/2012

Mon 11/12	Tue 11/13	Wed 11/14	Thu 11/15	Fri 11/16	Sat 11/17	Sun 11/18	Total Hours	Time Reporting Code
				8.00			8.00	HFL - Holiday - Floating
8.00	8.00	8.00	8.00				32.00	RGS - Regular Earnings - Sa

Office Closings

Office closings are entered in Time & Attendance using **CLO** for the **TRC**. Click the **ChartfFelds** link to auto populate the charge distribution. Then click the **Ok** button to return to the **Timesheet** page.



Lesson 2: Summary

In this lesson, you learned:

- Time & Attendance allows you to enter time and absence requests for other employees.
- You can record compensatory and overtime earned and taken on the timesheet.
- You can view a summary of an employee’s compensatory and/or overtime absence balances on the **Timesheet** page by expanding the **Leave and Compensatory Time Balances** section.
- Holidays are populated in Payable Time but are not visible on the timesheet.
- Scheduled holidays can be viewed on the Monthly Time Calendar page.

Lesson 3: Entering and Managing Absences

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

- Entering Absence Requests on the Timesheet
- Viewing Absence Balances
- Adjusting Absences

Entering Absence Requests on the Timesheet Page

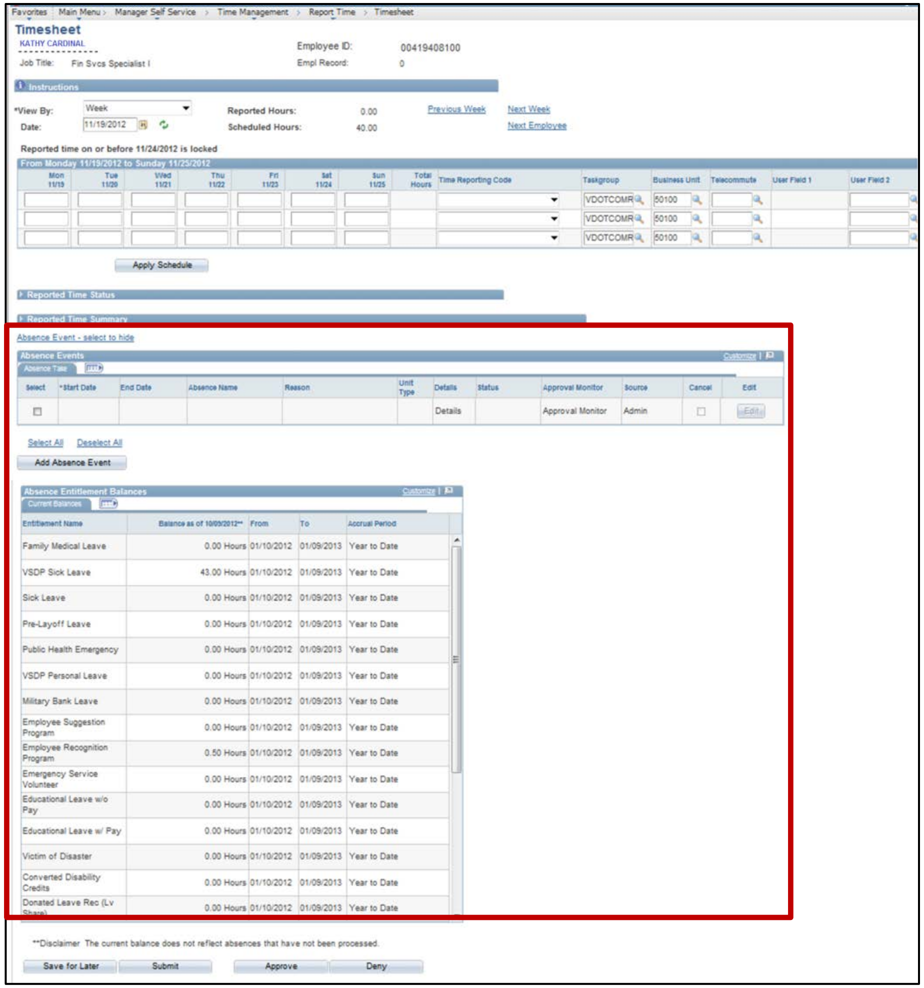
Timekeepers can enter absence requests on the **Timesheet** page.

You can navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Report Time > Timesheet

1. Enter the employee selection criteria
2. Click the **Get Employees** button
3. Click the employee name to open the employee's **Timesheet** page.

Once the employee's timesheet opens, click the **Absence Event – Select to View** link to open the **Absence Events** section of the **Timesheet** page.



Absence Event Section

Absence Event - select to hide

Absence Events Customize |

Absence Take

Select	*Start Date	End Date	Absence Name	Reason	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Edit
☐						Details		Approval Monitor	Admin	☐	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
Family Medical Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Sick Leave	43.00 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	0.00 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
Employee Suggestion Program	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Employee Recognition Program	0.50 Hours	01/10/2012	01/09/2013	Year to Date
Emergency Service Volunteer	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Educational Leave w/ Pay	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Victim of Disaster	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Converted Disability Credits	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Donated Leave Rec (Lv Share)	0.00 Hours	01/10/2012	01/09/2013	Year to Date

Adding an Absence Event

When you click the **Add Absence Event** button, a new row will appear. Enter your absence request on the new row by completing the required fields:

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

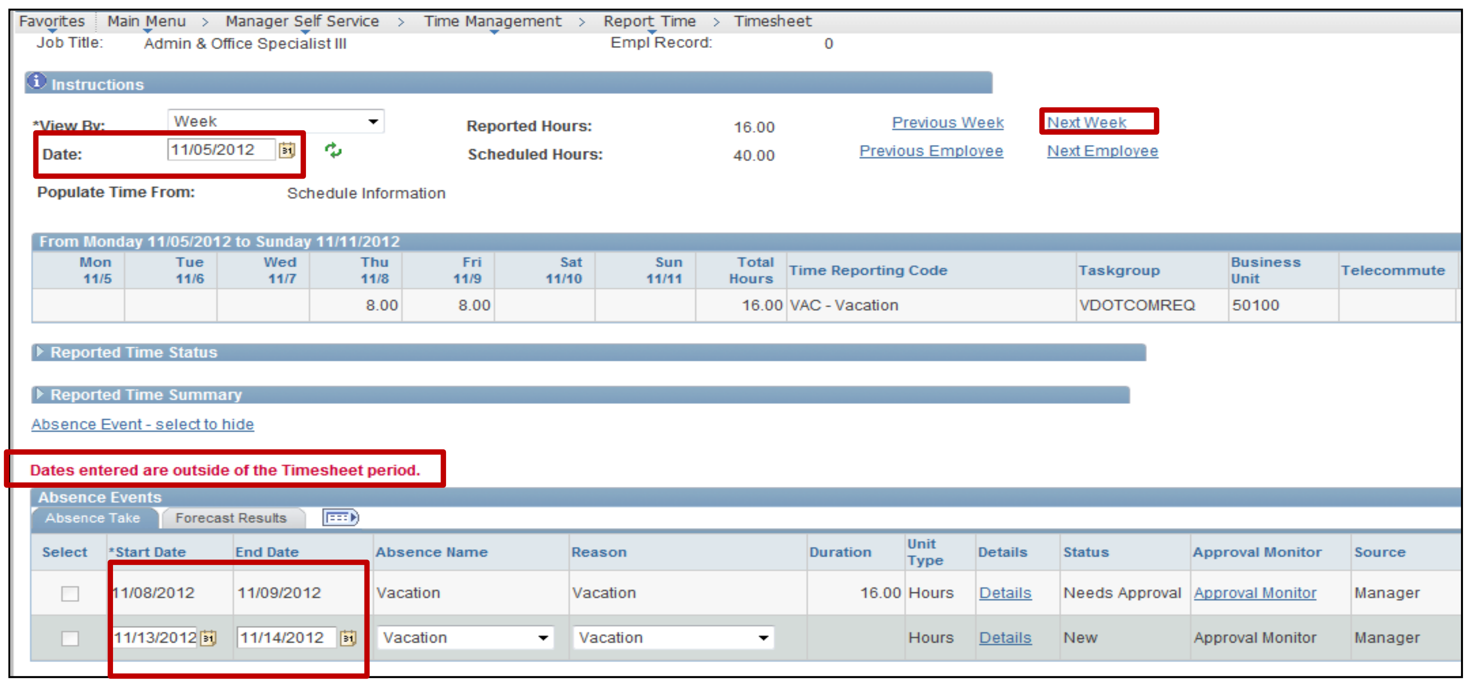
When an employee's absence crosses pay periods:

- Enter at least one absence request for each pay period. An absence request should not cross a pay period.
- Make sure that the begin date of each absence request falls within the timesheet week displayed on the timesheet that corresponds to the absence request dates.

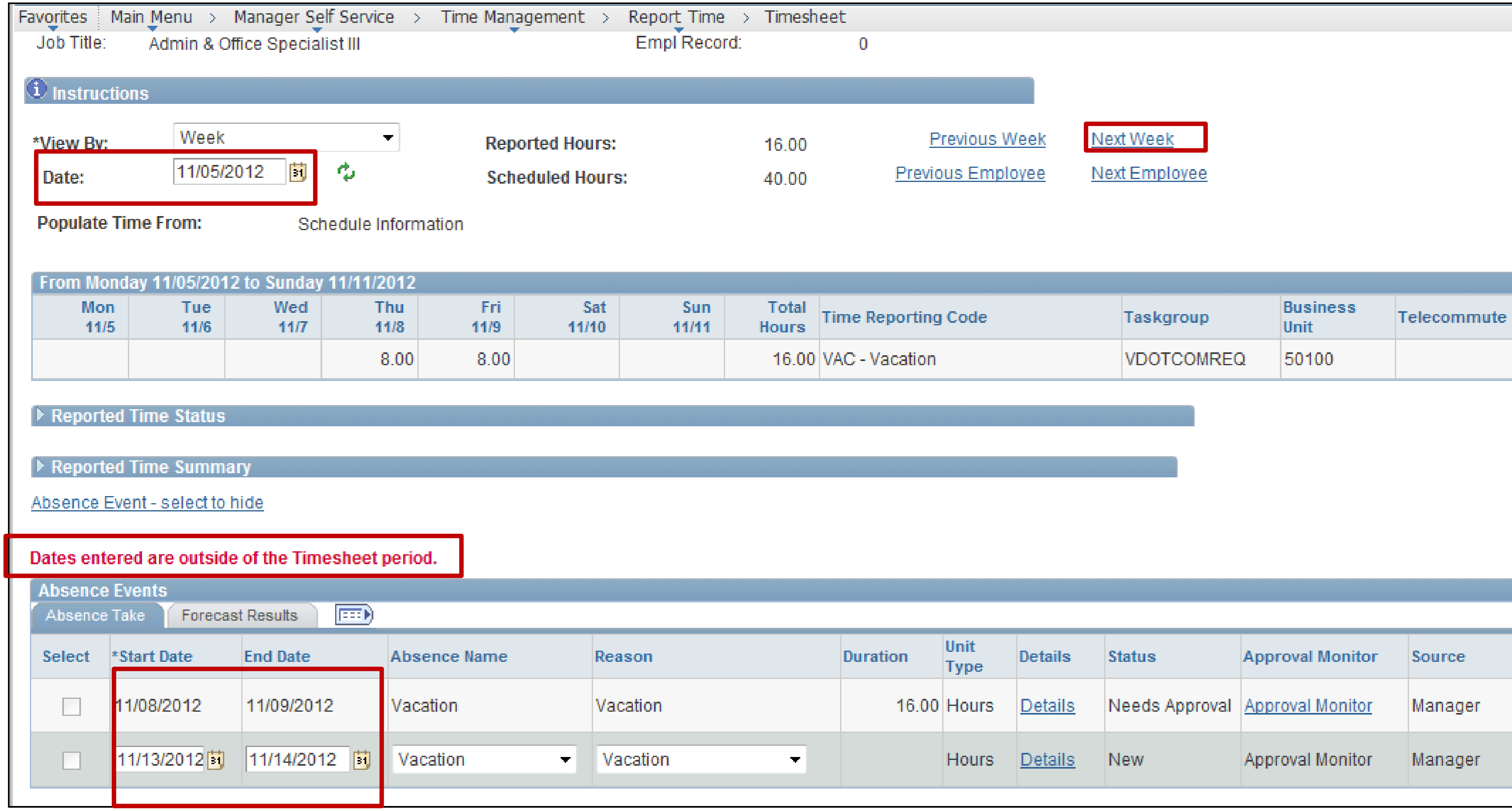
Adding an Absence Event (continued)

In the example below, you are entering vacation for an employee from 11/8-11/14. Because these dates cross pay periods, you must enter them as two requests.

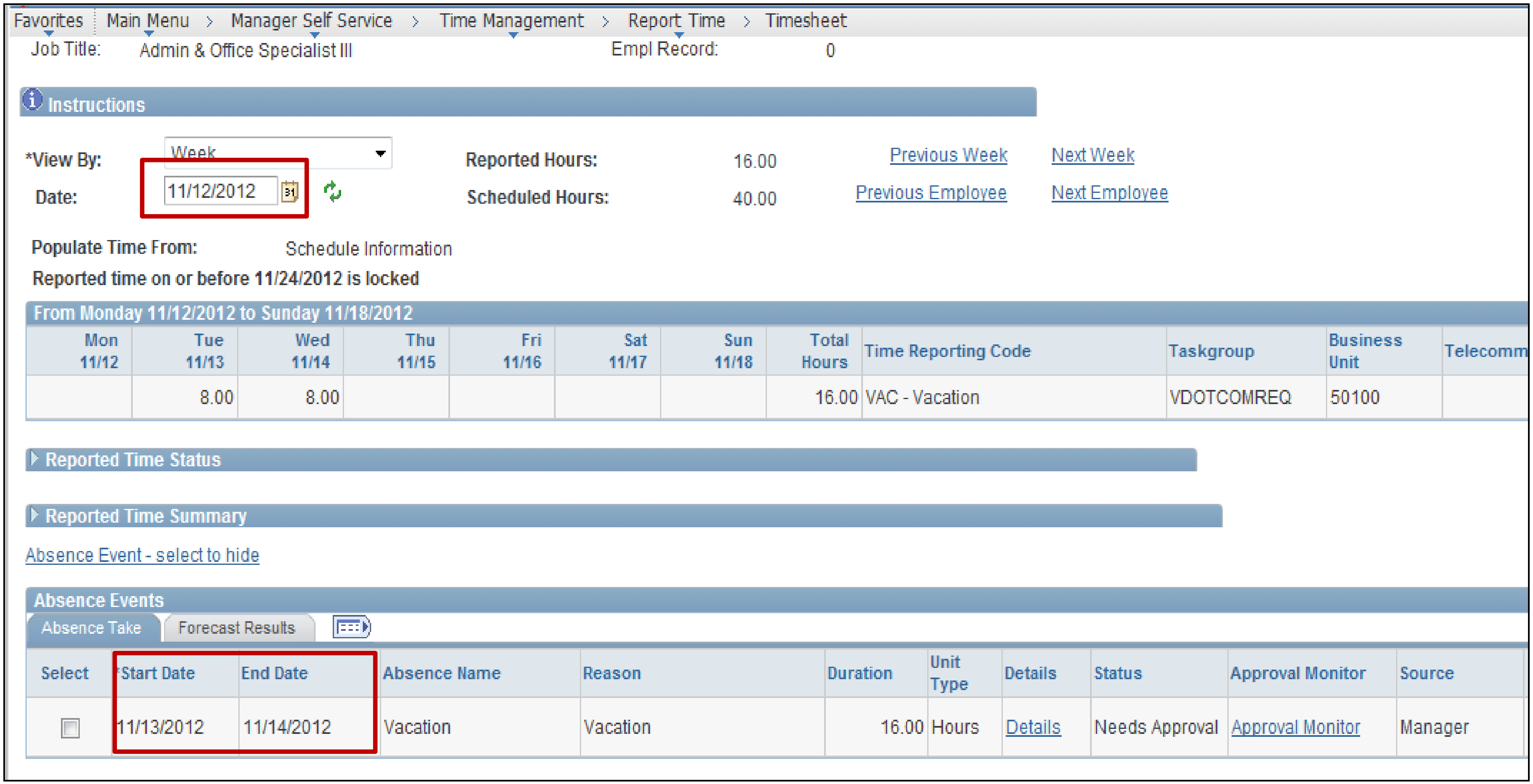
The **Date** field under the **View By** field in this screenshot is 5/2, so you are able to enter the first absence request for 11/8-11/9. However, when you enter an absence request for 11/13-11/14, Cardinal generates an error message because the absence request date falls outside of timesheet period currently displayed. In order to successfully enter and submit the request, you must go to the following week.



Adding an Absence Event (continued)



Adding an Absence Event (continued)



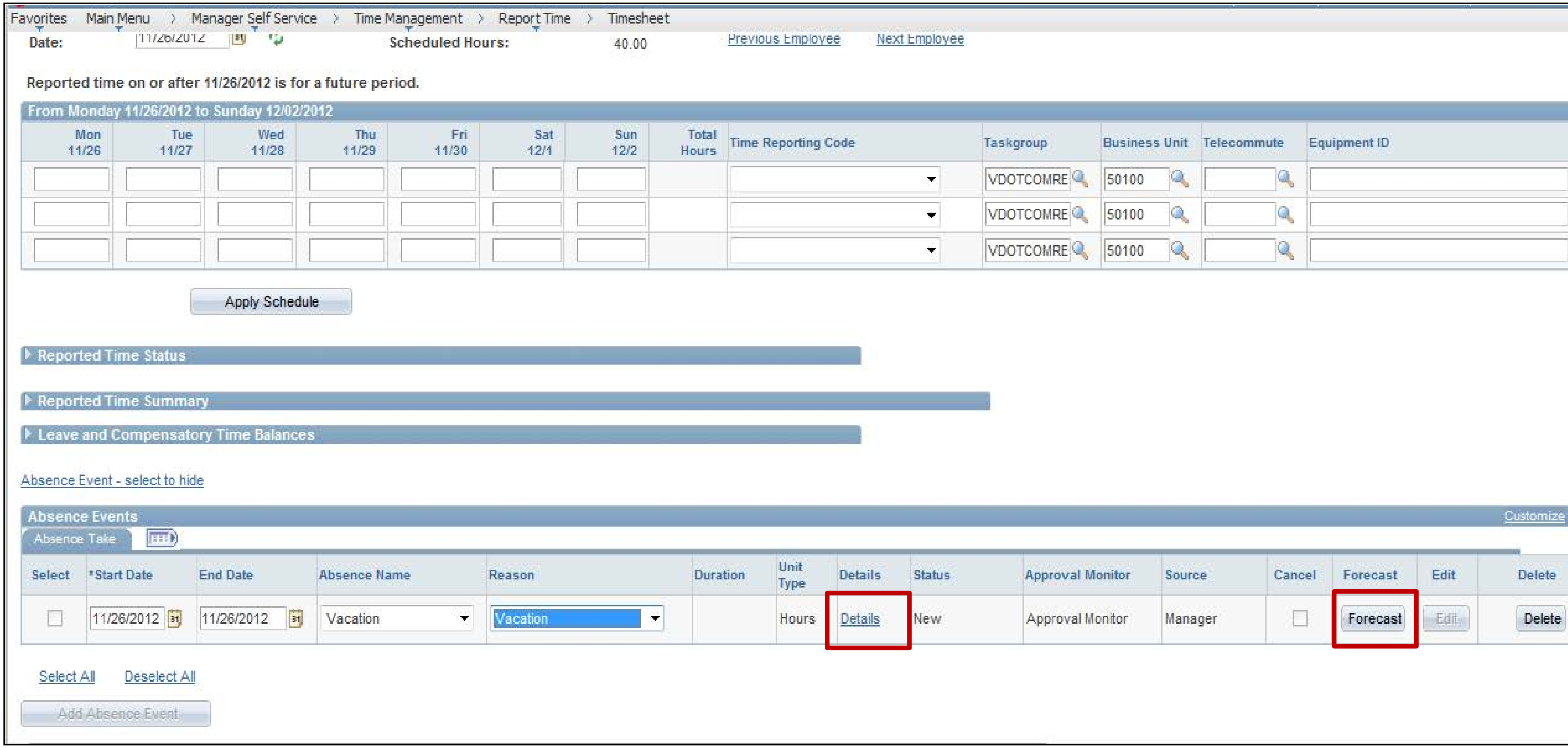
Absence Event Details and Forecasting

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

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

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

Absence Event Details and Forecasting (continued)



Absence Event Details Page

Favorites | Main Menu > Manager Self Service > Time Management > Report Time > Timesheet

Absence Event Details

Equip Srvc & Rep Mgr I

Enter Start Date, End Date, and Absence Name. Then complete the rest of the required fields before returning to the Timesheet page.

Absence Detail

*Start Date :	11/26/2012	View Monthly Calendar	
End Date :	11/26/2012		
Filter by Type :	All		
*Absence Name :	Vacation	Current Balance :	307.00 Hours**
*Reason :	Vacation		
Partial Days :	None		
Duration :	Hours		

Calculate End Date or Duration

Comments

Reporter Comments::

OK | Cancel

* Required Field

Partial Day Options

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

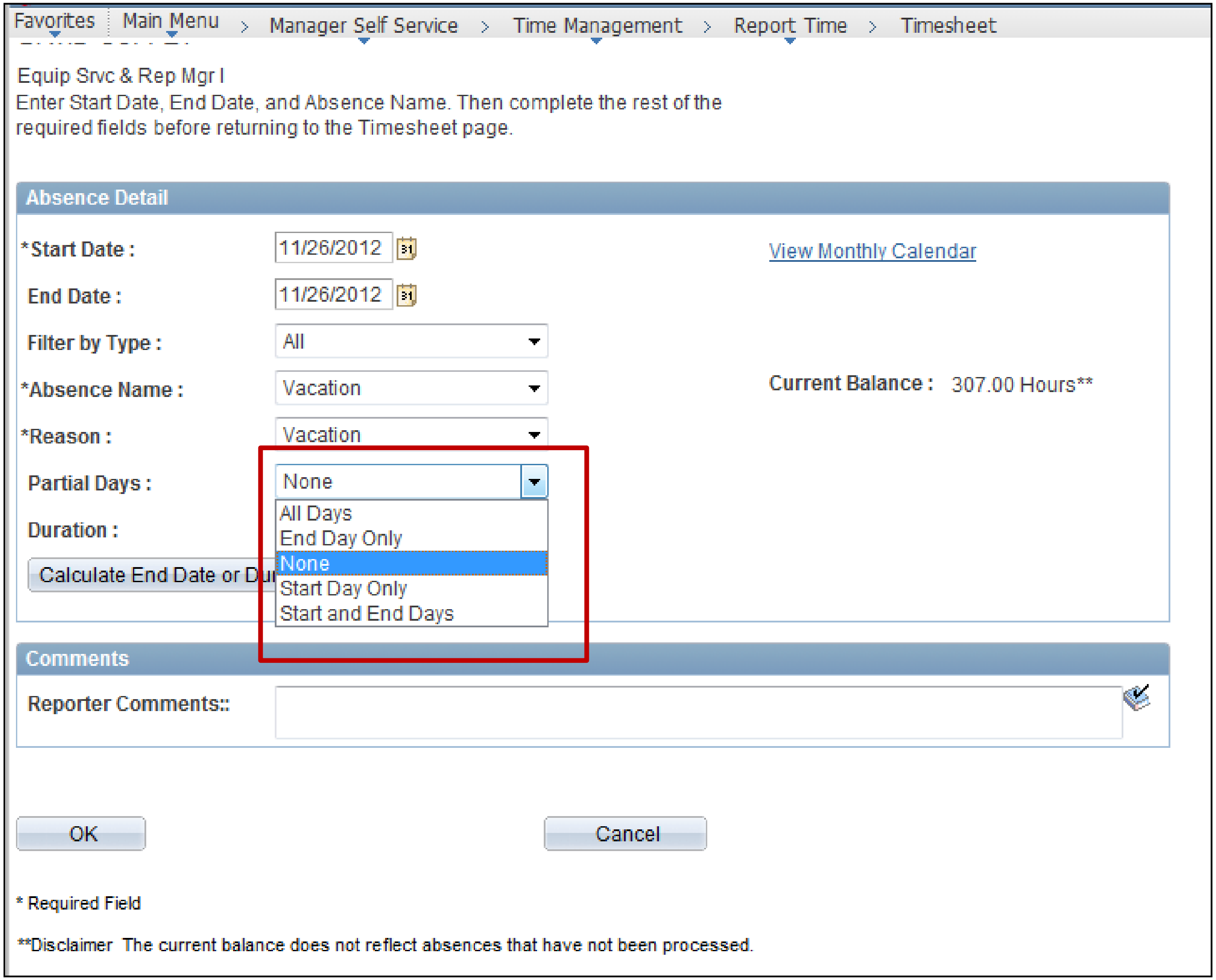
1. **All Days** – Use if the days entered will all be partial days. **This is the preferable option when there is only one day of leave and it is a partial day.**
2. **End Day Only** – Use when the end day only is a partial day.
3. **None** - This is the default field value. Do not adjust if none of 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 only are partial days

If your absence request does not fit any of these options, enter them as a separate request.

For example, you are taking three days off and the middle day only is a partial day. Enter this as two requests:

- Request 1: Day One (full day)
- Request 2: Days Two (partial day) and Three (full day) – Use **Start Day Only** option.

Partial Day Options (continued)



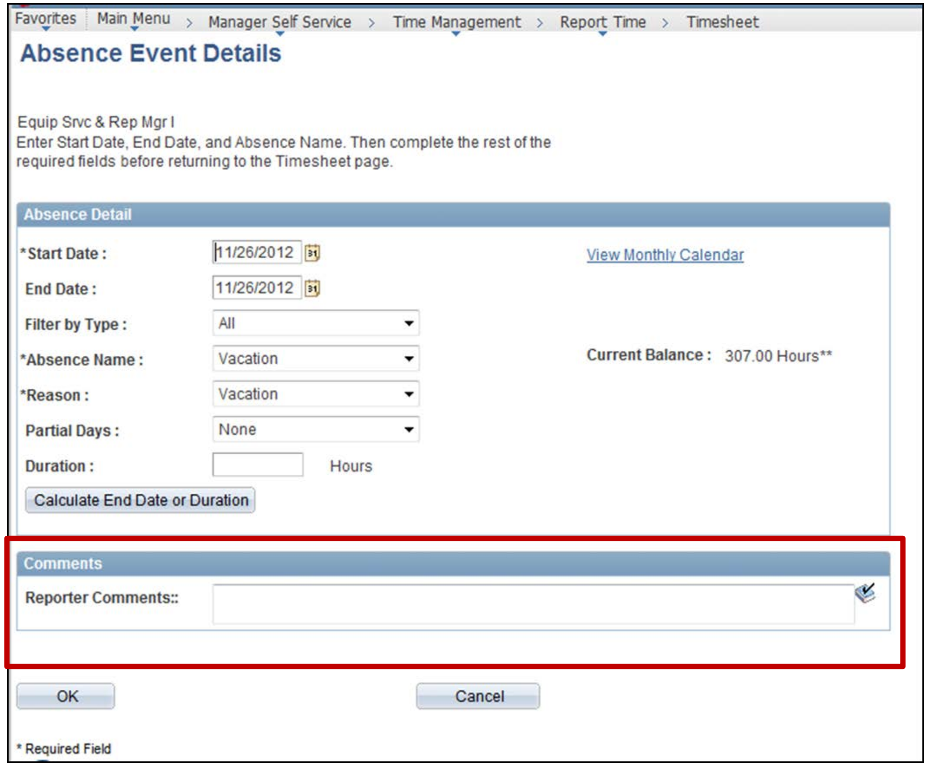
Reporter Comments

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 anyone. Do not enter anything that you would not want others to see.

Before clicking the **OK** button to return to the **Timesheet** page, click the **Calculate End Date or Duration** button in order for the appropriate fields to be updated. Usually, because End Date is entered with the absence event on the **Timesheet** page, the duration is calculated. This is confirmation of the total hours of the absence event.

Click the **OK** button to return to the **Timesheet** page.



Forecasting Absences

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:

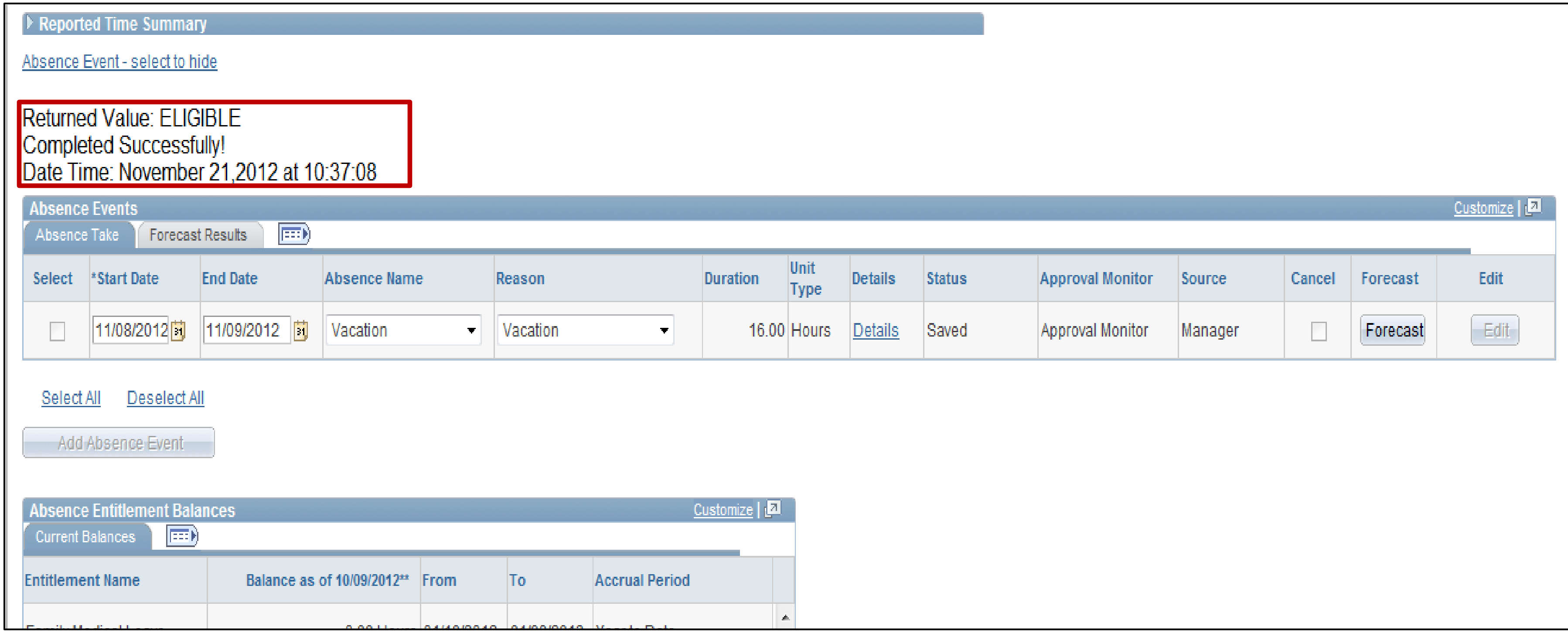
- All prior absence requests for that absence type, e.g., vacation, and anticipated entitlements
- Any scheduled increases in the employee accrual rate

If the absence type requires forecasting, the **Forecast** button will be 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 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



Future Absence Request

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 will see that you are now eligible for only 16 hours of leave.
- If you do update your absence request, 16 hours will be processed as personal leave and 16 hours will be processed as leave without pay.
- To avoid being on leave without pay, edit the request.

Verifying Eligibility

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.

Absence Events — Customize

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Forecast Value	Forecast DateTime	Forecast Details
☐	12/06/2012	12/07/2012	Volunteer Service Leave	School Assistance	ELIGIBLE	11/21/2012 11:21AM	Forecast Details

Select All Deselect All

Add Absence Event

Absence Events — Customize

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Forecast Value	Forecast DateTime	Forecast Details
☐	12/06/2012	12/07/2012	Volunteer Service Leave	School Assistance	INELIGIBLE	11/21/2012 11:23AM	Forecast Details

Select All Deselect All

Add Absence Event

Not Eligible for the Absence Requested

When you make an absence request and do not have sufficient entitlement balances, Cardinal generates an error message.

Absence Event - select to hide

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

Absence Events

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status
☐	11/26/2012	11/26/2012	Vacation	Vacation	8.00	Hours	Details	Needs Approval

Absence Request Approval

The supervisor may approve or deny an absence request.. Once a supervisor reviews and takes action regarding the 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 or denies the request, Cardinal allows you to edit the request. For example, if the employee had planned to use 4 hours of vacation, but used only 2, you would be able to edit the request and adjust the hours.

Submitting an Absence Request

Absences should be entered and submitted in advance whenever possible. Planned absences should be entered and submitted as soon as the need for the leave is known in order to obtain advance approval from the supervisor. Unplanned absences, such as sick leave, should be entered and submitted upon returning from the leave.

Absences should be submitted by clicking the **Submit** button at the bottom of the **Timesheet** page each time an absence event is entered or edited.

Submitting 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 have not been submitted on the timesheet.

Submitting a Saved Absence Request

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.

Other Absence Events

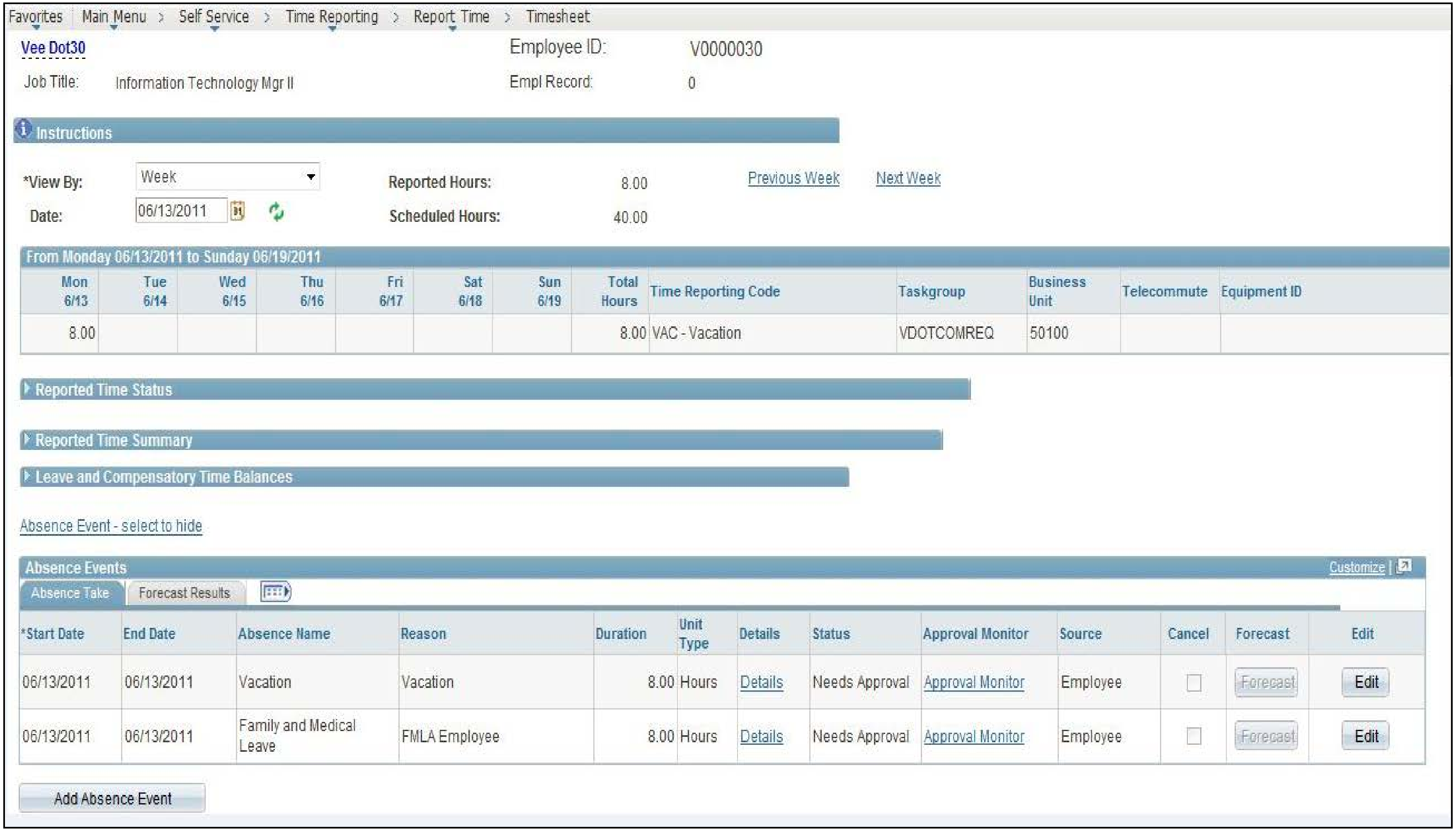
Select absence types must be assigned and/or entered by the Absence Management Administrator:

- **FMLA** (Family Medical Leave Act) – The Absence Management Administrator must enter a balance before it will be available on 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.

Intermittent FMLA entries, require two 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).

Other Absence Events (continued)



Viewing Absence Entitlement Balances

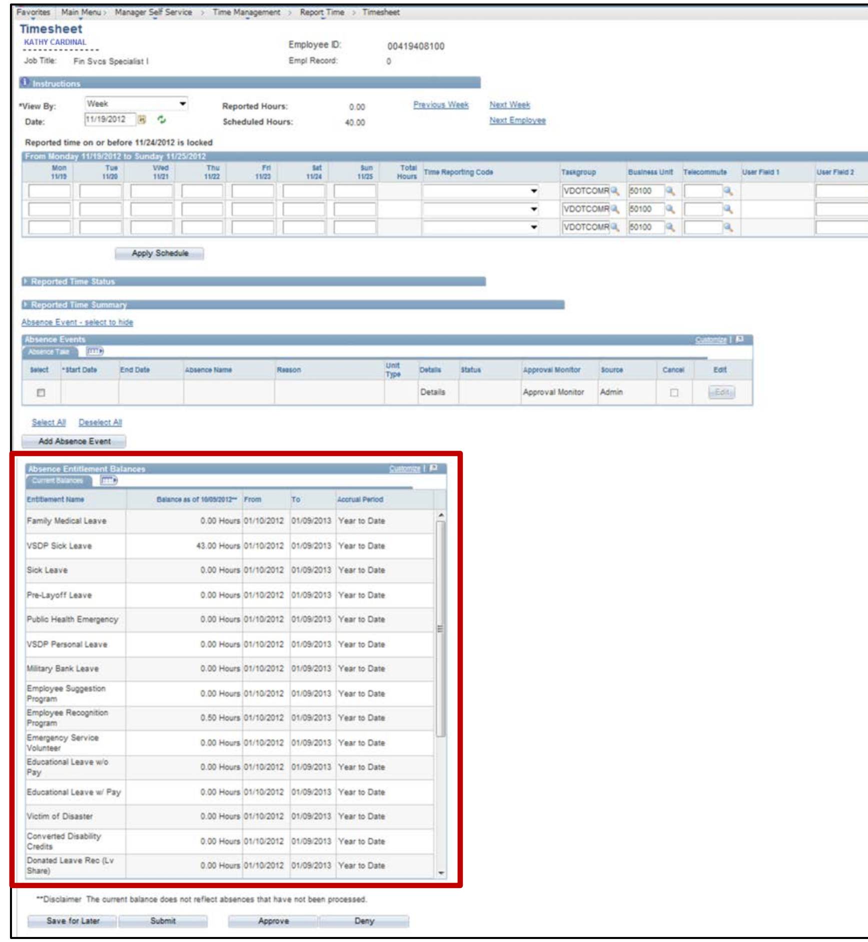
To view an employee's absence entitlement balances, click the **Absence Event – Select to View** link on the **Timesheet** page.

All absence balances are listed with the exception of compensatory time taken and overtime taken.

Use the scroll bar on the right to view additional absence type balances.

Absence Balances are not real time. The Balance section contains an "as of date". This date indicates the balances in this section are as of the specified date and does not take into account

- Absences in a "saved" or "needs approval" status
- Future absence requests



Absence Entitlement Balances (continued)

Absence Entitlement Balances | Customize |

Current Balances

Entitlement Name	Balance as of 10/09/2012**	From	To	Accrual Period
Family Medical Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Sick Leave	43.00 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	0.00 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
Employee Suggestion Program	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Employee Recognition Program	0.50 Hours	01/10/2012	01/09/2013	Year to Date
Emergency Service Volunteer	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Educational Leave w/o Pay	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Educational Leave w/ Pay	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Victim of Disaster	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Converted Disability Credits	0.00 Hours	01/10/2012	01/09/2013	Year to Date
Donated Leave Rec (Lv Share)	0.00 Hours	01/10/2012	01/09/2013	Year to Date

Balance Inquiry

As a Timekeeper, you can view the absence balances only up to the as of date. If an employee wants to find out what their absence balance will be at the current time or as of some future date, they will need to contact either their supervisor or an Absence Management Administrator to provide that information.

Lesson 3: Summary

In this lesson, you learned:

- How to enter absence requests for an individual employee on the **Timesheet** page.
- When the absence request is submitted, it automatically routes for approval and is posted to the employee's timesheet.
- Extended absence types, (e.g., FMLA, WCL, STD, LTD must be set up by an Absence Management Administrator.
- As a Timekeeper, you can view absence balances for the **as of** dates, not real time.

Lesson 4: Managing Exceptions

In the lesson you will learn about the following topic:

- Managing Exceptions

Managing Exceptions

All time entered is processed by Time Administration.

The Time Administration process checks submitted time against business rules and identifies exceptions. When submitted time is processed by Time Administration, the following may occur:

- 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.

Payable time is sent to the employee's supervisor for approval.

As a Timekeeper, you are responsible for reviewing payable time status the day after you submit employee's time.

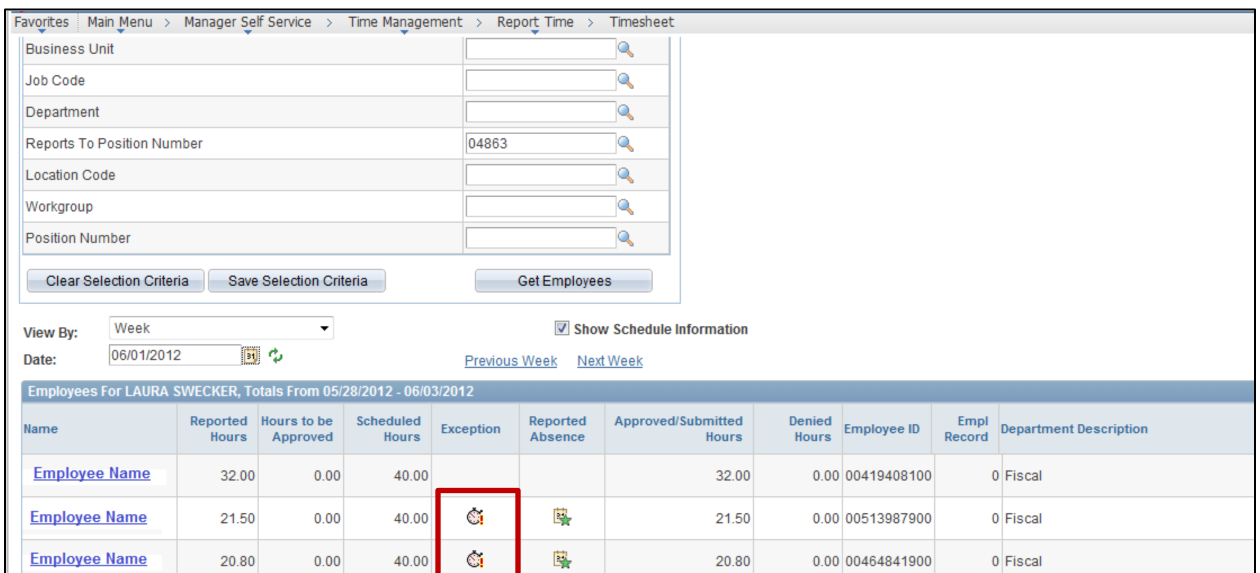
Identifying Employees with Exceptions

You can identify employees with exceptions on the **Timesheet Summary** page. Access this page using the following path:

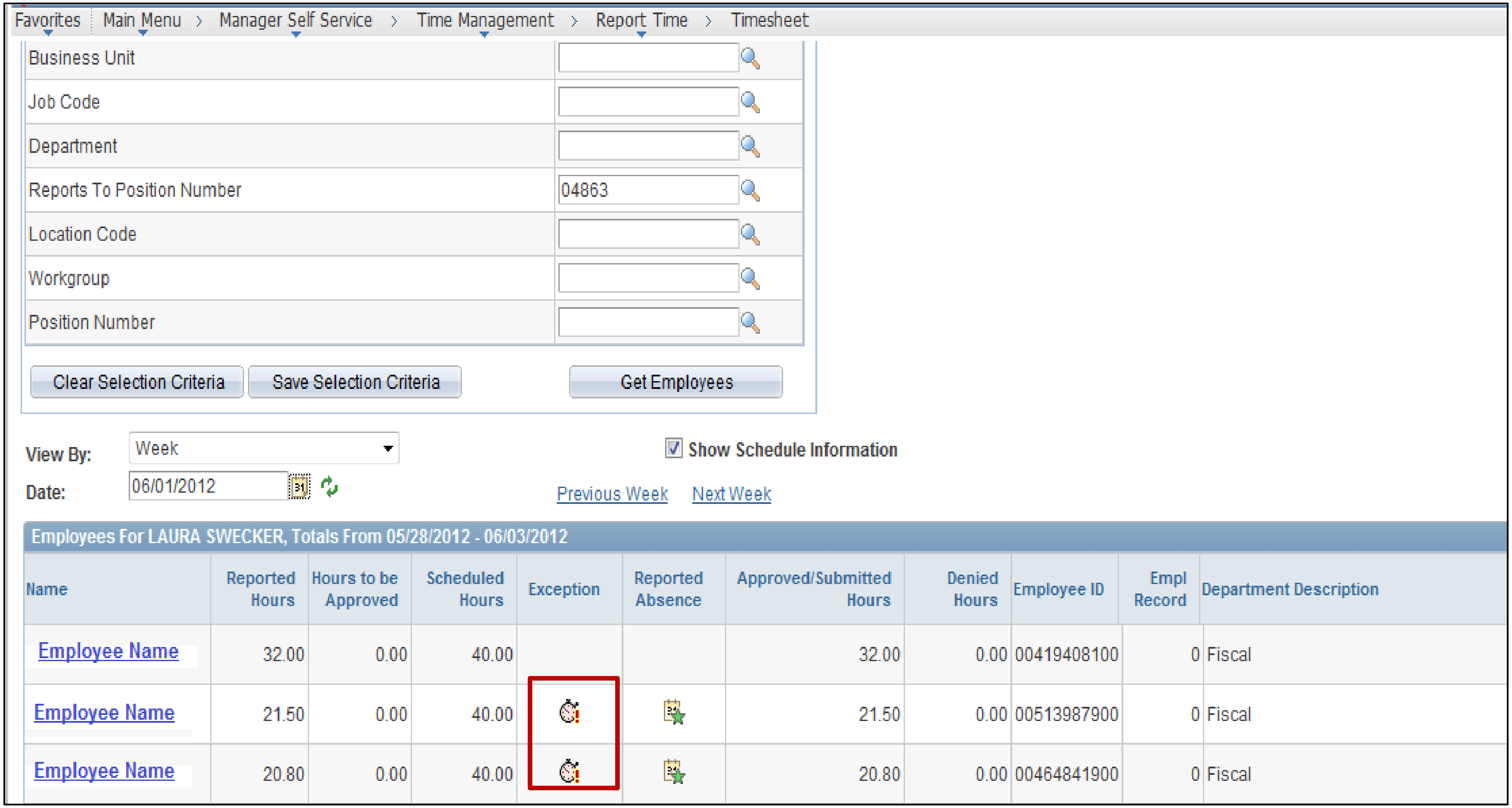
Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Timesheet

Enter the employee search criteria and click the **Get Employees** button.

The employees who match the criteria are displayed. Alarm clock icons flag any exceptions.



Managing Exceptions



Favorites | Main Menu > Manager Self Service > Time Management > Report Time > Timesheet

Business Unit	
Job Code	
Department	
Reports To Position Number	04863
Location Code	
Workgroup	
Position Number	

Clear Selection Criteria | Save Selection Criteria | Get Employees

View By: Week

Show Schedule Information

Date: 06/01/2012

Previous Week | Next Week

Employees For LAURA SWECKER, Totals From 05/28/2012 - 06/03/2012

Name	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Record	Department Description
Employee Name	32.00	0.00	40.00			32.00	0.00	00419408100	0	Fiscal
Employee Name	21.50	0.00	40.00			21.50	0.00	00513987900	0	Fiscal
Employee Name	20.80	0.00	40.00			20.80	0.00	00464841900	0	Fiscal

Viewing Exceptions

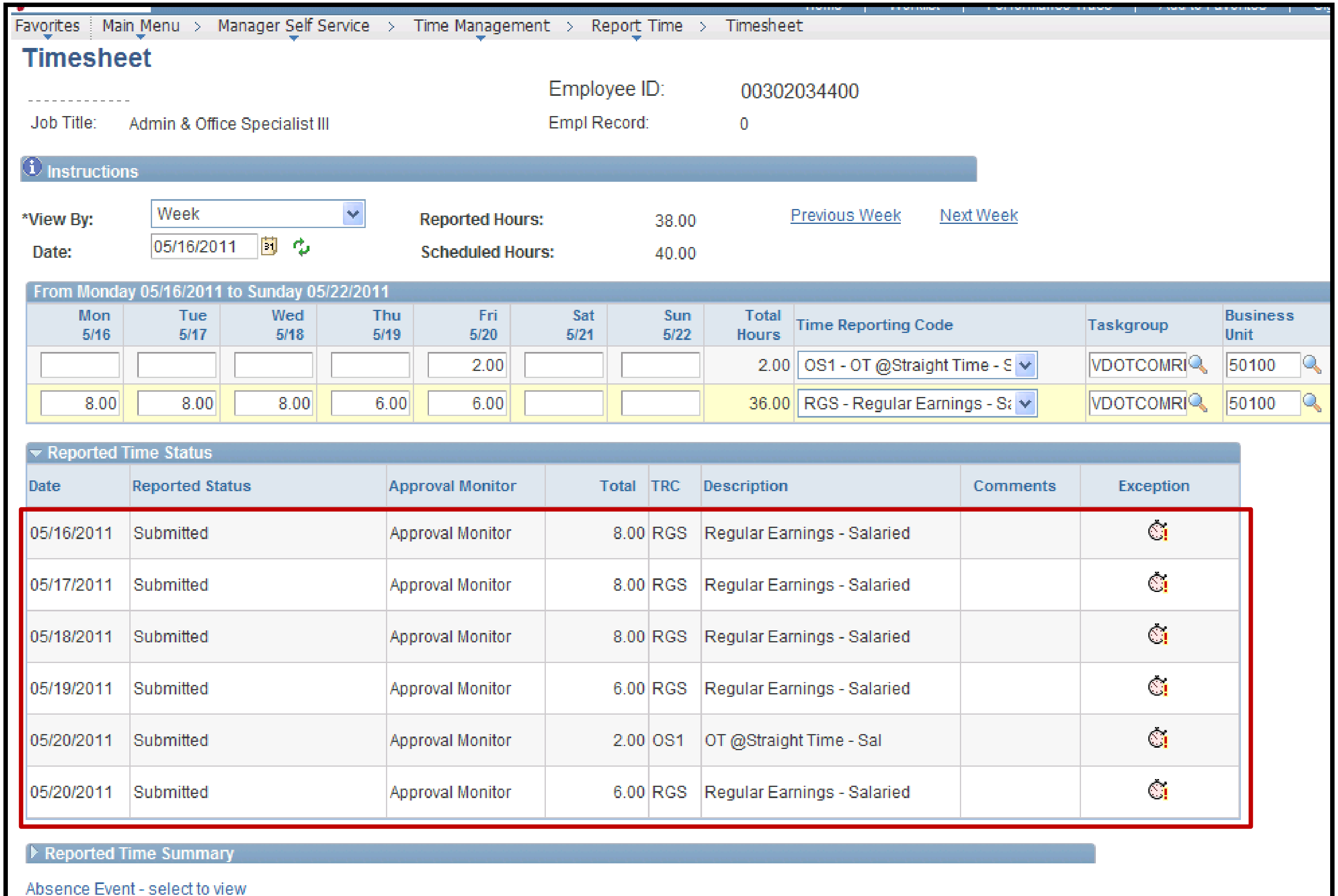
To view the exception details:

1. Select the employee who has an exception by clicking on the employee link.
2. Open the **Reported Time Status** section on the timesheet.
3. Click the alarm clock to open the **Exceptions** page.

The **Exceptions** page is a view only page that provides additional information about the exception(s), including the **Description**, **Date** and **Severity** level.

Click the **Details** tab to see more specific information about an exception.

Viewing Exceptions (continued)



Favorites | Main Menu > Manager Self Service > Time Management > Report Time > Timesheet

Timesheet

Employee ID: 00302034400

Job Title: Admin & Office Specialist III

Empl Record: 0

Instructions

*View By: Week

Date: 05/16/2011

Reported Hours: 38.00

Scheduled Hours: 40.00

Previous Week Next Week

From Monday 05/16/2011 to Sunday 05/22/2011

Mon 5/16	Tue 5/17	Wed 5/18	Thu 5/19	Fri 5/20	Sat 5/21	Sun 5/22	Total Hours	Time Reporting Code	Taskgroup	Business Unit
				2.00			2.00	OS1 - OT @Straight Time - S	VDOTCOMRI	50100
8.00	8.00	8.00	6.00	6.00			36.00	RGS - Regular Earnings - Sa	VDOTCOMRI	50100

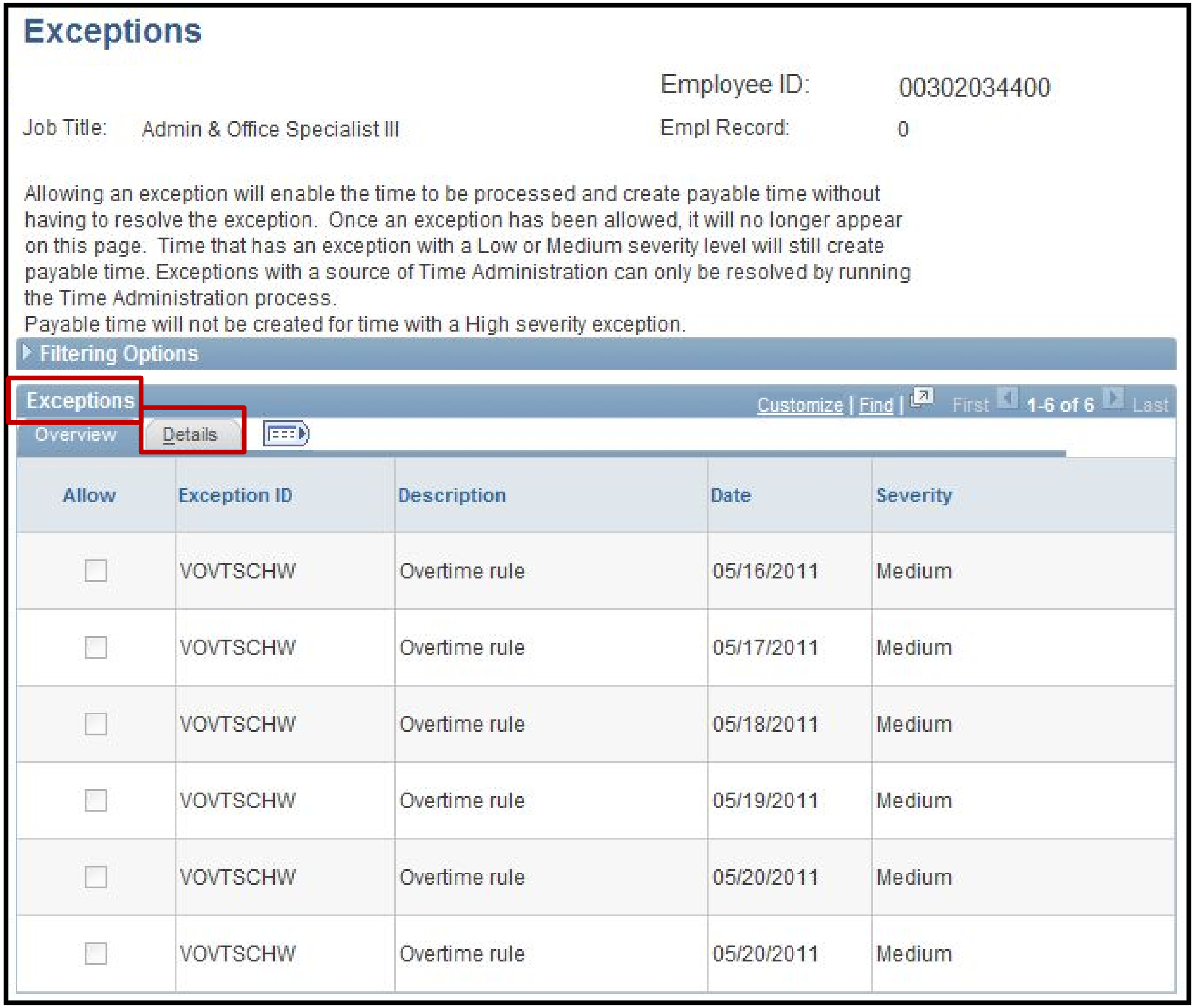
Reported Time Status

Date	Reported Status	Approval Monitor	Total	TRC	Description	Comments	Exception
05/16/2011	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried		
05/17/2011	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried		
05/18/2011	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried		
05/19/2011	Submitted	Approval Monitor	6.00	RGS	Regular Earnings - Salaried		
05/20/2011	Submitted	Approval Monitor	2.00	OS1	OT @Straight Time - Sal		
05/20/2011	Submitted	Approval Monitor	6.00	RGS	Regular Earnings - Salaried		

Reported Time Summary

Absence Event - select to view

Viewing Exceptions (continued)



Exceptions

Employee ID: 00302034400

Job Title: Admin & Office Specialist III

Empl Record: 0

Allowing an exception will enable the time to be processed and create payable time without having to resolve the exception. Once an exception has been allowed, it will no longer appear on this page. Time that has an exception with a Low or Medium severity level will still create payable time. Exceptions with a source of Time Administration can only be resolved by running the Time Administration process.
Payable time will not be created for time with a High severity exception.

Filtering Options

Exceptions — Customize | Find | First 1-6 of 6 Last

Overview | Details

Allow	Exception ID	Description	Date	Severity
☐	VOVTSCHW	Overtime rule	05/16/2011	Medium
☐	VOVTSCHW	Overtime rule	05/17/2011	Medium
☐	VOVTSCHW	Overtime rule	05/18/2011	Medium
☐	VOVTSCHW	Overtime rule	05/19/2011	Medium
☐	VOVTSCHW	Overtime rule	05/20/2011	Medium
☐	VOVTSCHW	Overtime rule	05/20/2011	Medium

Correcting Exceptions

You can review the details for an exception on the Details tab.

Refer to the **Time & Attendance Exceptions Job Aid** to find a comprehensive list of exceptions and the action that is required to fix them.

Exceptions

Employee ID: 00302034400

Job Title: Admin & Office Specialist III

Empl Record: 0

Allowing an exception will enable the time to be processed and create payable time without having to resolve the exception. Once an exception has been allowed, it will no longer appear on this page. Time that has an exception with a Low or Medium severity level will still create payable time. Exceptions with a source of Time Administration can only be resolved by running the Time Administration process.
Payable time will not be created for time with a High severity exception.

Filtering Options

Exceptions

Overview | Details

Allow	Exception ID	Description	Date	Source	Last Updated	Exception Data
☐	VOVTSCHW	Overtime rule	05/16/2011	Time Administration	06/30/2011 6:13:30PM	Employee has not fulfilled their scheduled hours.
☐	VOVTSCHW	Overtime rule	05/17/2011	Time Administration	06/30/2011 6:13:30PM	Employee has not fulfilled their scheduled hours.
☐	VOVTSCHW	Overtime rule	05/18/2011	Time Administration	06/30/2011 6:13:30PM	Employee has not fulfilled their scheduled hours.
☐	VOVTSCHW	Overtime rule	05/19/2011	Time Administration	06/30/2011 6:13:30PM	Employee has not fulfilled their scheduled hours.
☐	VOVTSCHW	Overtime rule	05/20/2011	Time Administration	06/30/2011 6:13:30PM	Employee has not fulfilled their scheduled hours.

Simulation: Managing Exceptions

You are now about to view a simulation on managing exceptions.

Lesson 4: Summary

In this lesson, you learned:

- Time must be submitted to be processed by Time Administration.
- Payable time will be sent to the employee’s supervisor for approval.
- Check the Reported Time Status the day after you submit time to check for exceptions.
- Exceptions are flagged with an alarm clock icon in the exceptions column on the **Timesheet Summary** page.
- When you correct an exception, resubmit the time to be reprocessed by Time Administration.

Lesson 5: Performing Timesheet Adjustments

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

- Performing Timesheet Adjustments

Adjusting the Timesheet

When you review an employee's timesheet, you may notice items that require adjustment. For example, you may need to:

- Correct TRC/hours based on an exception generated by rules in Time Administration
- Correct a TRC
- Update the number hours charged to a charge distribution
- Change a charge distribution
- Edit to 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 an administrator.

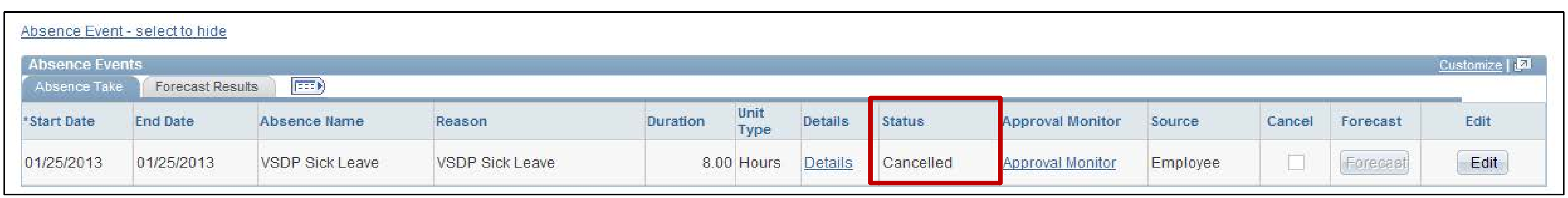
Canceling an Absence Request

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.



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 <u>immediately</u>.

Adjusting the Timesheet (continued)

To adjust the 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, then you will need to go back to the timesheet and adjust the original time entered for that day as the system will 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 absence request for Wednesday and submit, the 8 hours will reflect as vacation. Go to Wednesday on the timesheet and delete the 8 regular hours and then submit your time.

Adjusting the Timesheet (continued)

Please note that although you never enter negative hours on the **Timesheet** page in Cardinal (the system will not allow this), you may see negative hours on the **Payable Time Detail** page. As a reminder, the **Payable Time Detail** page is where you are able to view the **Approval Status** of payable time (hours entered in the timesheet grid).

When adjustments are made to the timesheet after it has been approved, Cardinal processes this change and it displays as a negative hours on the **Payable Time Detail** page even though negative hours were not entered. For example:

- An employee entered 8 hours of time for a particular charge distribution.
- The supervisor approves the time.
- The employee makes an adjustment to the charge distribution after the approval.
- Cardinal would generate a -8 entry on the **Payable Time Detail** page. This negative offset removes the 8 hours charged to the original ChartField distribution.

Simulation: Performing Time Entry Adjustments

You are now about to view a simulation on performing time entry adjustments on the individual employee's timesheet.

Lesson 6: Summary

In this lesson, you learned:

- To adjust the hours on an employee's timesheet, input the updated values (hours, TRC or charge distribution) and submit again.
- Planned absences that are not taken can be cancelled.
- Do not enter negative hours to back out time that has already been reported.
- After a correction is made and submitted again, Time Administration replaces the original time reported with the adjusted time and validates.
- Cardinal generates negative entries on the **Payable Time Detail** page when time adjustments occur after they were approved by the supervisor.

Lesson 6: Reports and Online Inquiries

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

- Reports
- Online Inquiries

Reports

Key Timekeeper reports include:

- Timesheet Report
- Timesheet Exception Report
- Employee Leave Detail Report
- Summary of Productive Hours Report/Query
- Hourly Employee Tracking Report
- Payable Status Report

These reports are available through the **TA Reports** page. You can navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > TA Reports

Timesheet Report

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

- A record of productive and non productive hours
- The status of productive and non productive time:
    - **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 distributions of timesheet entries by day.

Refer to the **Running the Timesheet Report Job Aid** for more information.

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 / payable time.

Every salaried employee in Cardinal will be assigned a weekly or bi-weekly schedule. All hourly employees have a schedule of 0 hours. For salaried employees, the report will show 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 will have the ability to track eligible overtime and confirm your timesheet is completed (submitted) which is required for the custom allocation process to perform correctly.

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 provides summary data by Leave Type, Year-to-date for the Employee.
- Section 2 of this SQR report provides “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 provides “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 Detail Report Job Aid** for more information.

Summary of Productive Hours Report

The purpose of the Summary of Productive Hours Report is to give managers a view of productive hours worked over a specific time period by organization and/or employee(s). This report will have the ability to report in two different views:

1. Organization Level with Employee Detail
2. Organization Level with summarized values

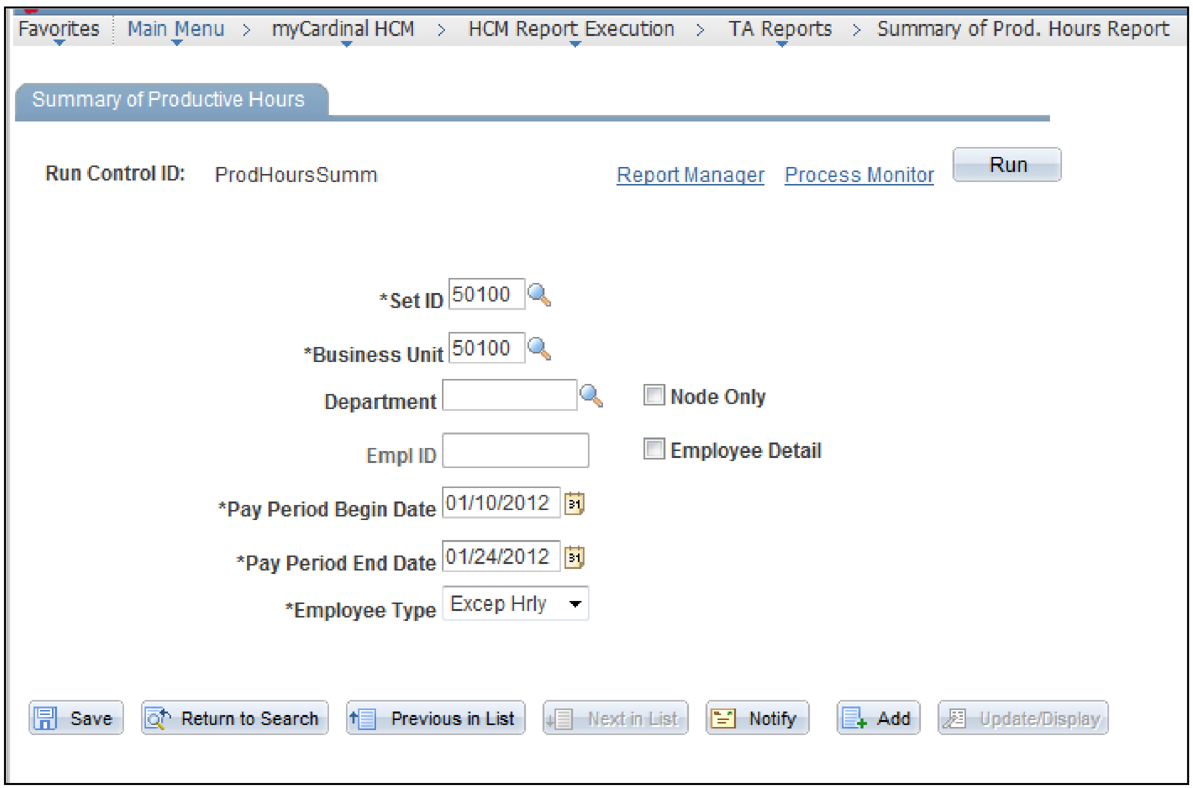
This report will report all TRCs without separating regular and overtime hours. Only Department ID's with employee directly related will be reported. The summarized values will be at the direct Department ID level (no roll up).

This report will give the flexibility to report by Salaried, Hourly/Emergency employee or both over any date range in which the user enters. So for managers of Salaried employees, the report could be chosen for productive hour information over a specific period(s) of 10th – 24th or 25th – 9th of each month. While a manager for Hourly employees could report on information for bi-weekly period end dates for productive hours. Finally, a manager could pull all the productive hour information that would cover a longer span such as a fiscal year spanning July 1st of one year to June 30th of the next.

Summary of Productive Hours Report (continued)

You can access the Summary of Productive Hours Report using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > myCardinal HCM > HCM Report Execution > TA Reports > Summary of Prod. Hours Report



Summary of Productive Hours Report (continued)

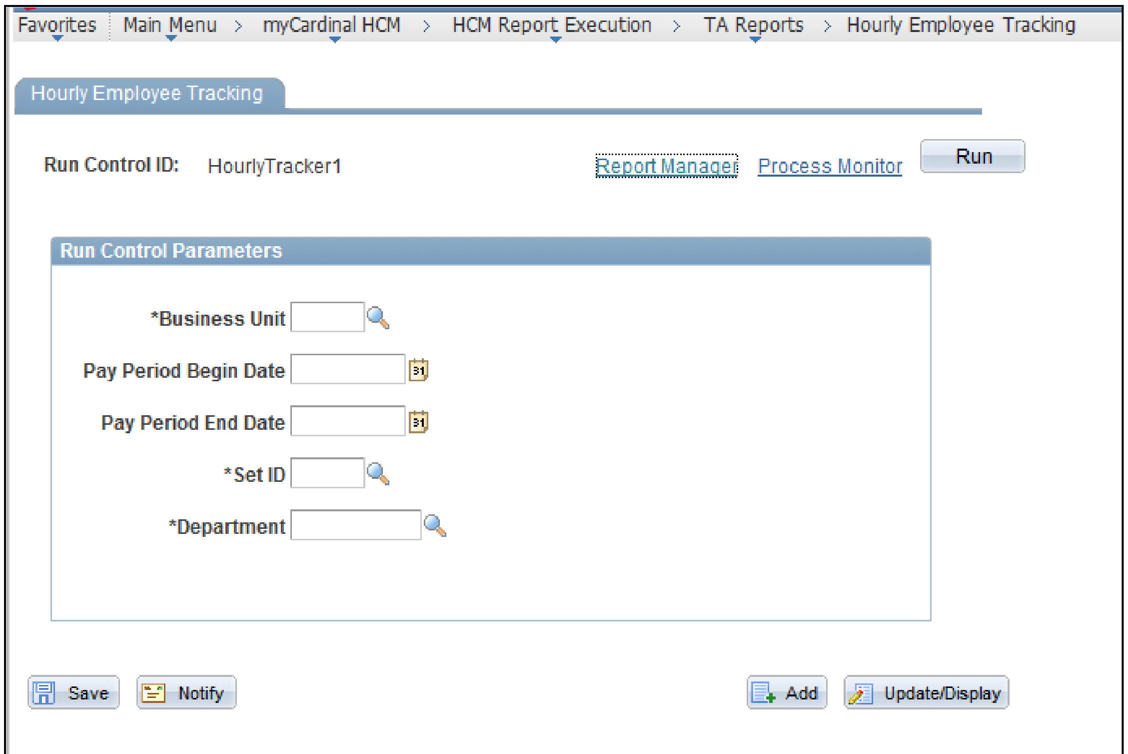
This is an example of the Summary of Productive Hours report.

Commonwealth of Virginia														
SUMMARY OF PRODUCTI	Run Date: 02/13/2012													
Report ID: RTA030	Run Time: 12:25 00													
Page No. 1	of	1												
Business Unit:	50100	VDOT Business Unit												
Setid:	50100	VDOT SetID												
Department:	10003	Administrative Services												
Node Only:	N													
Employee ID:														
Pay Period Begin Date:	1/10/2012													
Pay Period End Date:	1/24/2012													
Employee Type:	H													
Employee Detail:	N													
Org.	Name	ID	Role	Type	ERG	RGH	RGS	RLW	RSW	COE	COH	COP	EO1	EO2
10003 - Administrative Services					0	68	0	0	0	0	0	0	0	0

Hourly Employee Tracking Report

Tracks hourly employees who are approaching or exceeding their hours allowed for that contract period. You can access this report using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > myCardinal HCM > HCM Report Execution > TA Reports > Hourly Employee Tracking



Hourly Employee Tracking Report (continued)

This is an example of the Hourly Employee Tracking report.

Commonwealth of Virginia

HOURLY EMPLOYEE TRACKING

Report ID: RTA005

Run Date: 04/14/2011
Run Time: 08:40 00

Page No. 1 of 1

Business Unit:	50100	VDOT Business Unit
Pay Period Begin Date:	01/03/2011	
Pay Period End Date:	04/12/2011	
Setid: Xxxxx,xxxxx	50100	VDOT SetID
Departmen Xxxxx,xxxxx	10000	All Central Office Orgs

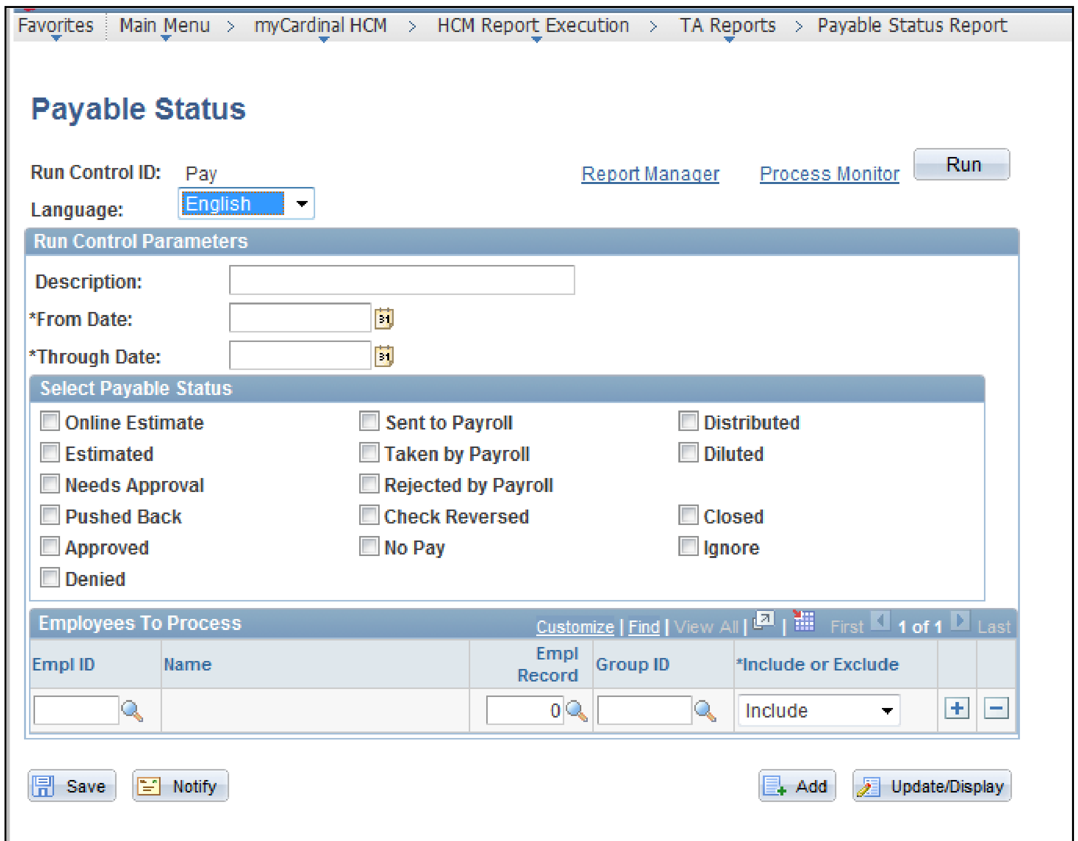
Emplid	Name	Position#	Location	Department	Contract Hours	Paid Hours	Remaining Hours	Contract Start Date	Contract End Date	Status A	B	C	D	E
333334	EMHrly,Popeye2	33333334	10	10015	250.00	0.00	250.00	01/11/2011	02/04/2011	N	N	Y	Y	N
11111118	John,Stephan	11111119	10	10025	100.00	0.00	100.00	01/03/2011	01/31/2012	N	N	N	N	N

STATUS LEGEND:
A: Employees within 80% of Contracted Hours
B: Employees within 14days of Contract End after Pay Period End Date
C: Employees whose Contract Expires within Pay Period End Date
D: Employees reported hours Exceed Contract Hours
E: Employees who have exceed Contract limits

Payable Status Report

The Payable Status report displays the status of payable time. Access this report using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > myCardinal HCM > HCM Report Execution > TA Reports > Payable Status Report



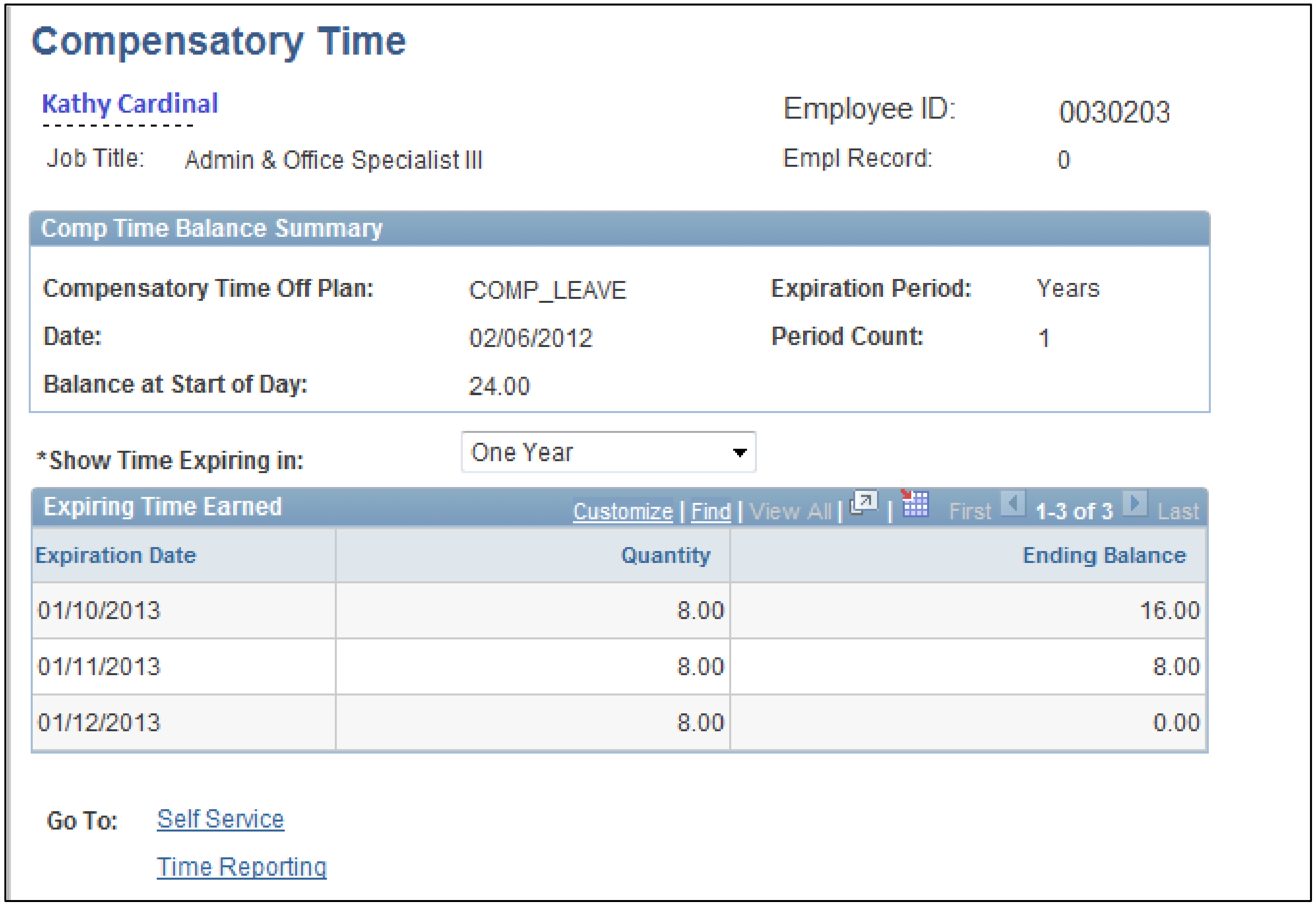
Online Inquiries

Timekeeper online inquiries available on the **Timesheet** page include:

- Compensatory Leave Detail
- Absence Entitlement Balances
- View Exceptions

Compensatory Leave Detail

Click the **Comp Time** link from the **Timesheet** page to view compensatory time details.



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

Absence Entitlement Balances

To access the absence balances from the **Timesheet** page, click the **Absence Event-select to view**, to be able to view the **Absence Entitlement Balances** section.

Absence Event - select to hide

Absence Events

Absence Take

Select	*Start Date	End Date	Absence Name	Reason	Unit Type	Details	Stat
☐						Details	

Select All Deselect All

Add Absence Event

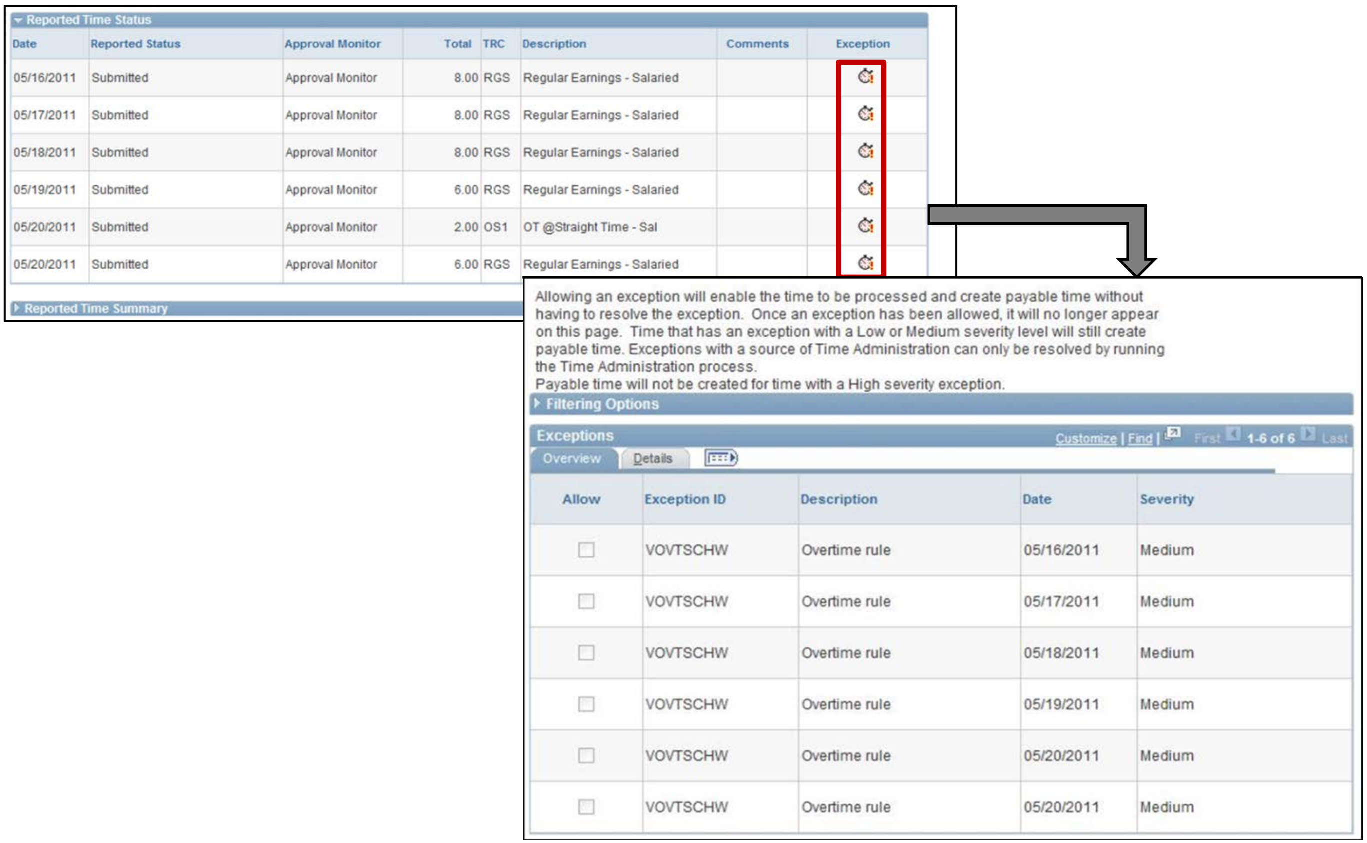
Absence Entitlement Balances Customize |

Current Balances

Entitlement Name	Balance as of 10/09/2012**	From	To	Accrual Period
Family Medical Leave	0.00 Hours	01/10/2012	01/09/2013	Year to Date
VSDP Sick Leave	43.00 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	0.00 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
Employee Suggestion Program	0.00 Hours	01/10/2012	01/09/2013	Year to Date

View Exceptions

To view exceptions from the **Timesheet** page, open the **Reported Time Status** section, click the image (alarm click), under the Exceptions column. This opens the **Exceptions** page to view the details about the exception(s).



Reported Time Status

Date	Reported Status	Approval Monitor	Total	TRC	Description	Comments	Exception
05/16/2011	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried		
05/17/2011	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried		
05/18/2011	Submitted	Approval Monitor	8.00	RGS	Regular Earnings - Salaried		
05/19/2011	Submitted	Approval Monitor	6.00	RGS	Regular Earnings - Salaried		
05/20/2011	Submitted	Approval Monitor	2.00	OS1	OT @Straight Time - Sal		
05/20/2011	Submitted	Approval Monitor	6.00	RGS	Regular Earnings - Salaried		

Reported Time Summary

Allowing an exception will enable the time to be processed and create payable time without having to resolve the exception. Once an exception has been allowed, it will no longer appear on this page. Time that has an exception with a Low or Medium severity level will still create payable time. Exceptions with a source of Time Administration can only be resolved by running the Time Administration process.
Payable time will not be created for time with a High severity exception.

Filtering Options

Exceptions — Customize | Find | First 1-6 of 6 Last

Overview | Details

Allow	Exception ID	Description	Date	Severity
	VOVTSCHW	Overtime rule	05/16/2011	Medium
	VOVTSCHW	Overtime rule	05/17/2011	Medium
	VOVTSCHW	Overtime rule	05/18/2011	Medium
	VOVTSCHW	Overtime rule	05/19/2011	Medium
	VOVTSCHW	Overtime rule	05/20/2011	Medium
	VOVTSCHW	Overtime rule	05/20/2011	Medium

Lesson 6: Summary

In this lesson, you learned how to:

- Access key reports and online inquiries

Lesson 7: Timekeeper Processing 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 Summary

In this course, you learned to:

- Understand key concepts related to Time & Attendance
- Enter time worked
- Enter absence requests
- Make timesheet adjustments
- Manage timesheet exceptions
- Access timesheet reports and online inquiries

Course Evaluation

Congratulations! You successfully completed the **TA364: Time & Attendance Timekeeper Processing** course. Please use the evaluation link to assess this course.

Appendix

- Key Terms

Key Terms - General

Manager Self Service: The entry and approval of time and absence requests on behalf of other employees.

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

Timesheet Page: The page in Cardinal where users:

- Enter and submit productive time and absence requests
- View compensatory and overtime balances
- View absence entitlement balances
- Forecast and submit absence requests

Time Reporter Group: The Time Reporter Group is one of the selection criteria on the **Timesheet Summary** page. There are three Task Reporter Groups for VDOT which are as follows:

- **VDOTALL** – All active VDOT employees
- **VDOTHRL** - All active VDOT hourly employees
- **VDOTSAL** - All active VDOT salaried employees

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

Key Terms – General (continued)

Workgroup: A group of Time Reporters who share the same time reporting requirements. The workgroup determines the Time Reporting Rules and Time Reporting Codes that apply to an employee. All Time Reporters must be associated with a valid workgroup. For VDOT, the Workgroups are as follows:

- **VDOTEMHRLY** - VDOT Emergency Hourly
- **VDOTEXCEPT** – 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
- **VDONNONEXM** – VDOT Salaried Non Exempt

Key Terms – Timesheet Entry

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

Compensatory Time: Identifies additional hours an employee works in a workweek, that can be taken as paid time off within 12 month's from the date it is worked.

ChartFields: Identify how time is charged.

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

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

Key Terms – Absence Management

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

Accrual Periods: The time periods by which employees earn absence entitlements, 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, e.g., Vacation, VSDP Sick, VSDP Personal.

Absence Event: The consecutive period of time an employee is absent for the same type of absence, e.g., Vacation, Civil Leave, Compensatory Time Taken, 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 Absence (absence type).

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

Key Terms – Timesheet Processing

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

Submitted Time: Time that has been submitted for processing by 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.

Time Reporting Rules: A set of defined business rules that Time Administration uses to validate reported time. For example, “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. When time is successfully processed, no exceptions or low/medium exceptions are reported. Payable time is sent to the employee’s supervisor for approval.

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.