TA365: Time & Attendance Approvals

Web Based Training

Rev 11/14/2013

Welcome

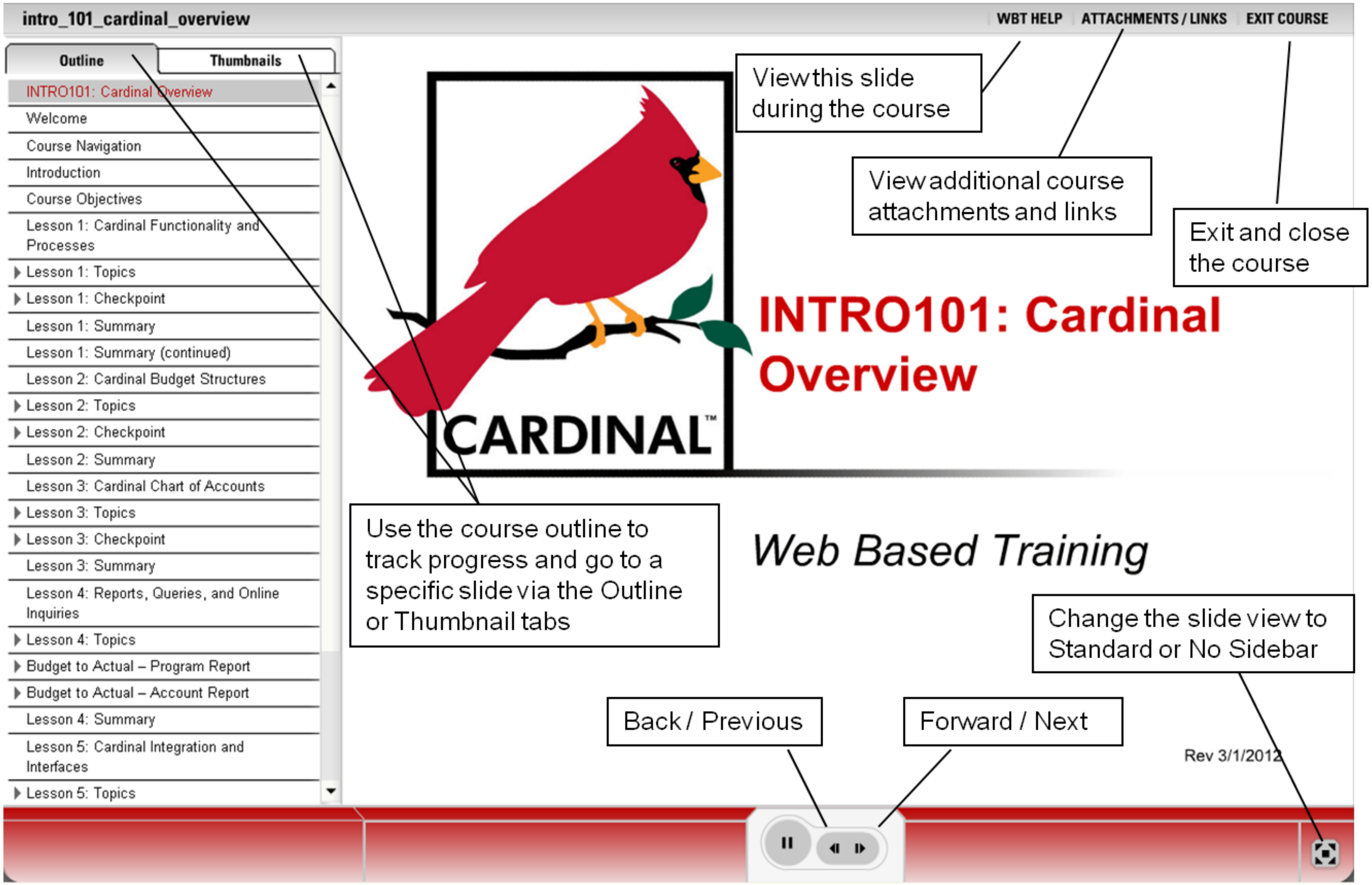
Welcome to Cardinal Training!

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 Time & Attendance approvals.

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.

Course Navigation



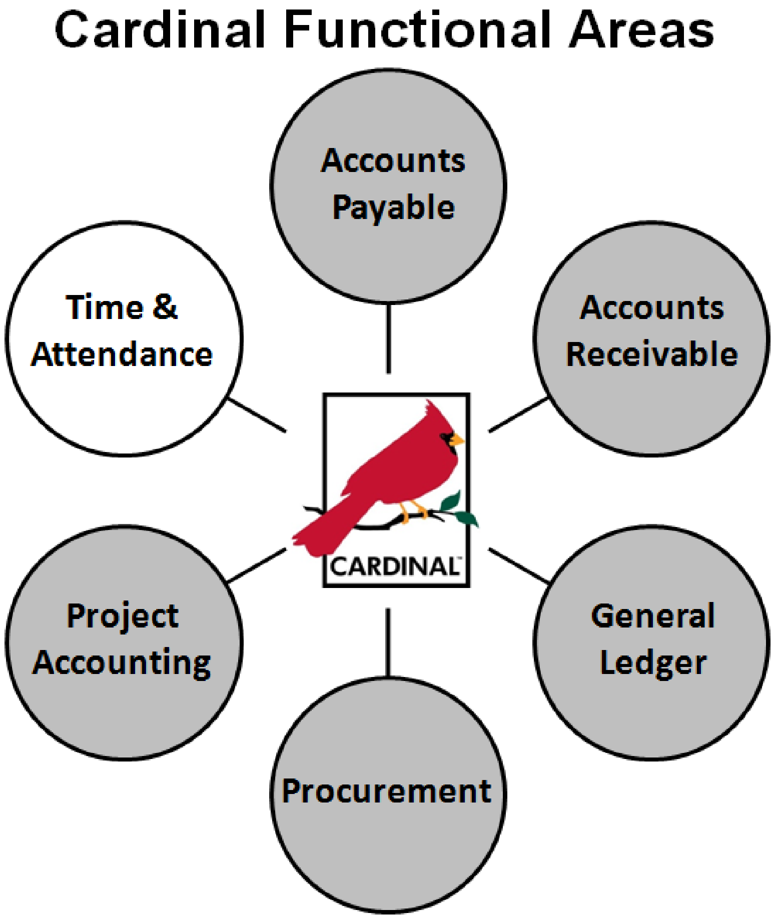
Introduction

Cardinal contains six functional areas which are housed in two distinct Cardinal applications:

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

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

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



Course Objectives

After completing this course, you will be able to:

- Describe Time & Attendance concepts and approval overview
- Explain the difference between payable time and reported time
- Manage timesheet exceptions
- Approve or deny payable time and reported time via the worklist or direct navigation
- Explain who enters and approves extended leave
- Delegate approval items on your worklist

Course Topics

In this course, we will cover the following:

- Lesson 1: Understanding Time & Attendance Approvals
- Lesson 2: Managing Exceptions
- Lesson 3: Approving & Denying Payable and Reported Time
- Lesson 4: Delegating Time & Attendance items

Assessment questions will check for your understanding.

Lesson 1: Understanding Time & Attendance Approvals

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

- Key Concepts
- Approval Overview

Key Concepts

Some key concepts in approving Time & Attendance include:

- Time entered in the timesheet grid of the Timesheet page is not available for approval until it has been processed by Time Administration.
- System rules create exceptions (warnings or errors) for employee's entered and submitted time that does not meet predefined business rules.
- There are three types of exceptions; high, medium or low.
- Only high exceptions prevent time from becoming payable time.
- Supervisors should review and address all exceptions.
- When an employee makes an adjustment to payable time after it has been approved, the hours display as negative time on the approval page.
- Supervisors must approve negative hours to avoid errors when the allocation process is run at the end of each pay period.
- Absences entered in the Absence section of the Timesheet page are available for approval immediately upon submission.

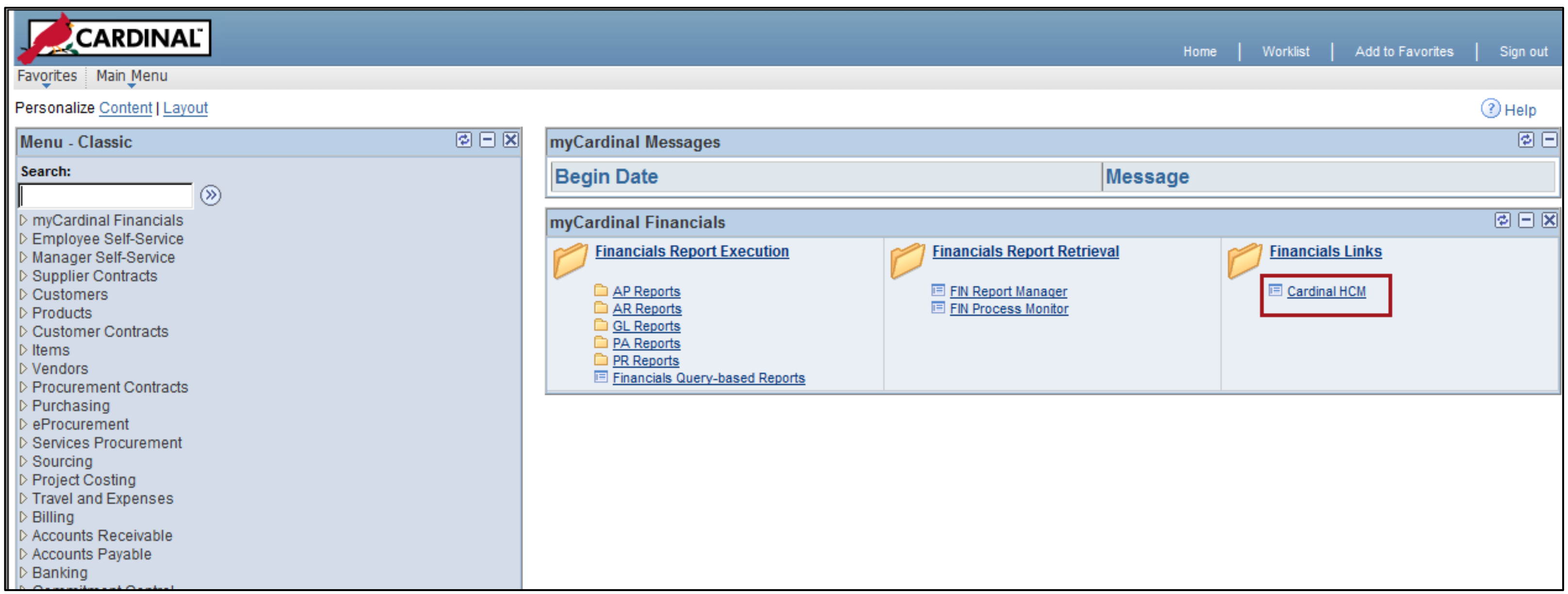
Approval Overview

Time & Attendance Approvers approve time and absences for employee users (Time Reporters).

All Time & Attendance approvals are completed in the **Cardinal HCM** (Human Capital Management) site.

To access the **Cardinal HCM**:

1. Log Into Cardinal
2. From the main page (**myCardinal Financials**), click the **Cardinal HCM** link.



Approval Overview (continued)

There are two types of time that managers approve in Cardinal:

1. **Payable Time**
2. **Reported Time**

Payable Time is reported hours worked and non-productive TRCs entered in the timesheet grid, located at the top of the Timesheet page, that has been successfully processed by Time Administration.

Reported Time (absences) is time entered in the absence event grid section of the **Timesheet** page.

Note: Extended leave is entered and approved by the Absence Management Administrator.

Payable Time Approval List

Payable time includes:

- Office Closing
- Called Out Exempt
- Actual Hours Called Out
- Compensatory Leave Earned or Taken
- Emergency Comp Earn
- Emergency OT @ Time ½ - Salary or Hourly
- Emergency OT Leave
- Emergency Regular – Hourly
- Emergency Straight Time OT – Salary
- Holiday – Floating
- No Holiday Pay
- Pre-Approved On-Call Hours
- OT @ Straight Time – Salary
- OT @ Time ½ - Salary or Hourly
- Overtime Leaved Earned or Taken
- Regular Earnings – Hourly or Salary
- Regular Time LTD Working or STD Working
- Uncompensated Overtime

Reported Time (Absences) Approval List

Reported Time (absences) includes:

- Family Medical Leave
- Leave Without Pay
- Military Bank Leave, Leave, Physical, or Leave Disaster
- VSDP Personal Leave
- Public Health Emergency
- Pre-Layoff Leave
- Sick Leave
- VSDP Sick Leave
- Vacation
- Worker's Compensation (Day of Injury)
- Civil Leave
- Annual Leave Incentive
- Volunteer Service Leave
- Donated Leave
- Victim of Disaster
- Education Leave w/Pay or w/o Pay
- Emergency Service Volunteer
- Emergency Preparation Time
- Employee Recognition Program
- Employee Suggestion Program

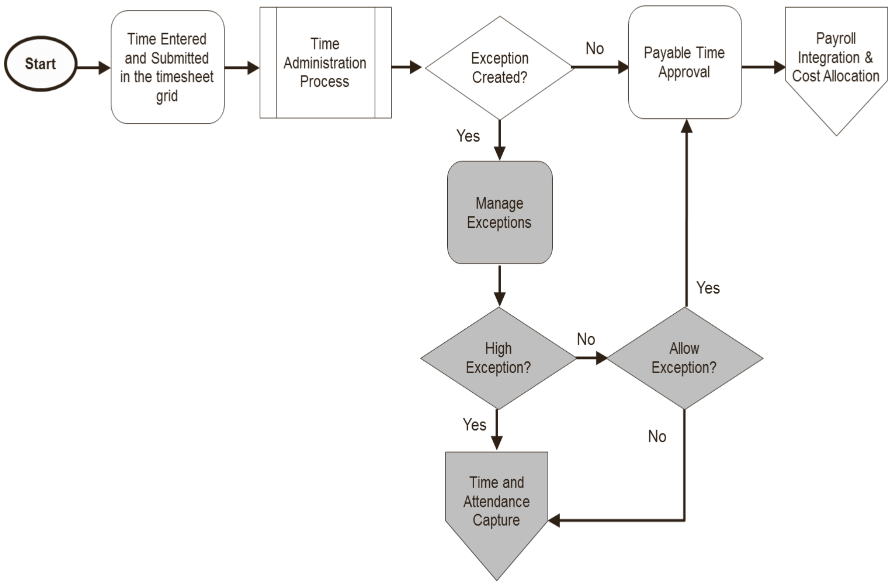
Submitted Time Approval Routing

Once time or absences are submitted on the **Timesheet** page, they must be approved by the manager.

Time entered and submitted in the timesheet grid go through the Time Administration batch process. This process uses various time reporting rules to validate time entered in the timesheet grid to determine if the time can be made payable. This includes:

- Hours worked
- Compensatory time earned/taken
- Overtime leave earned/taken

Payable Time then routes to the employee's Supervisor for approval.



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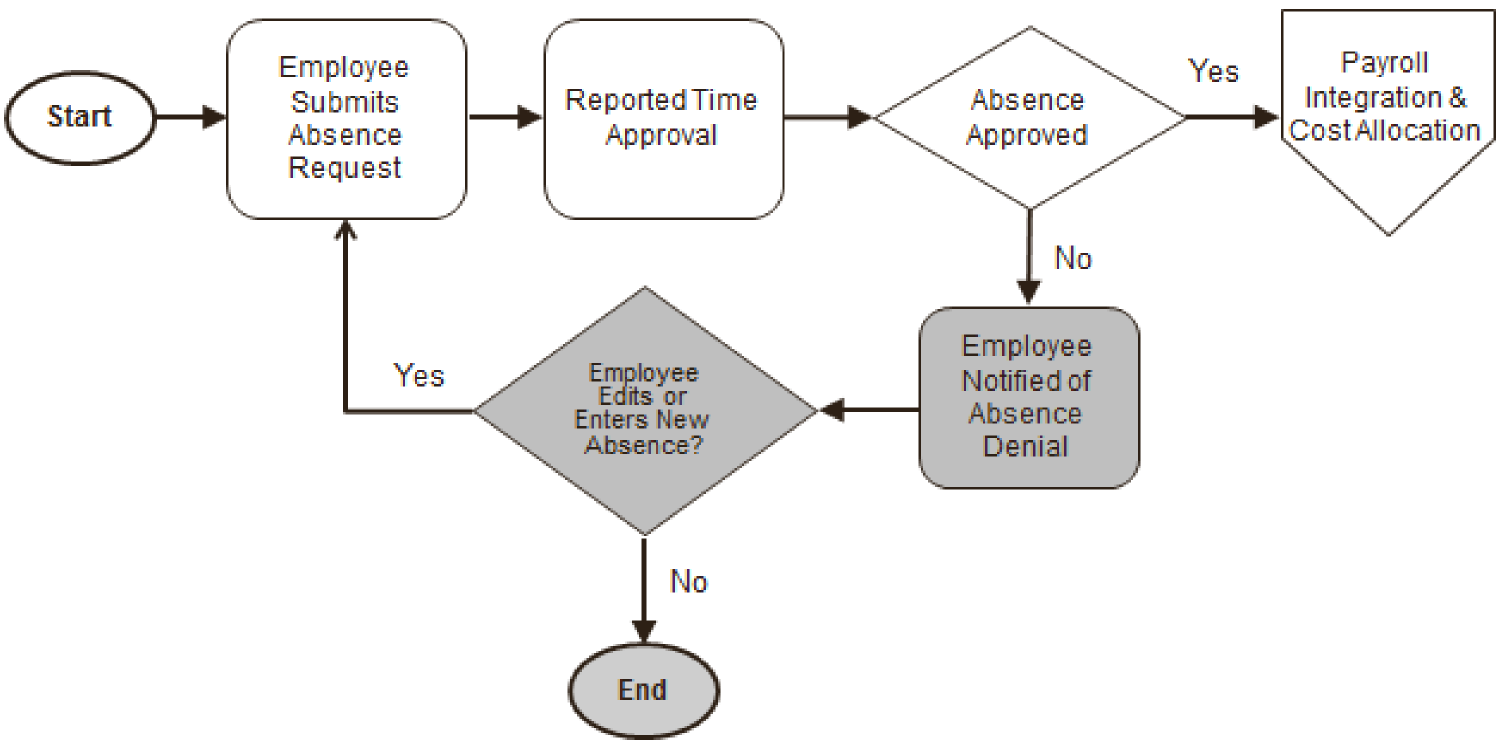
Submitted Time Approval Routing (continued)

Absences are entered in the absence grid on the **Timesheet** page. Once the Time Reporter clicks the **Submit** button, they route for approval immediately as reported time.

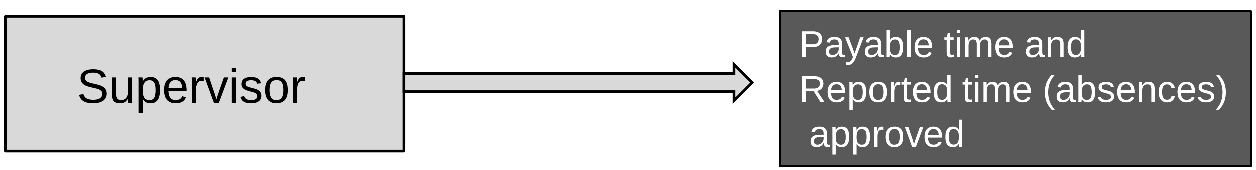
Approvers are notified of reported time (absences) and payable time (productive time and comp and overtime leave) that needs approval through the worklist.



Time Approval Levels

Payable time and reported time (absences) require one level of approval:

- **Supervisor**: The user's Supervisor can approve or deny payable time and reported time.
  - Cardinal does not send an email to the person that entered the request when payable time and reported time are approved.
  - If denied, Cardinal sends a notification email to the person who entered the request.



Lesson 1: Checkpoint

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

Payable time is entered in the Timesheet grid located at the top of the Timesheet page.

- True
- False

Select the answer from the list that completes the blanks for the questions below.

Reported time (absences) are entered in the ________ section of the **Timesheet** page.	-- Select --
Payable time is a result of time entered in the timesheet grid and processed by ________.	-- Select --
Reported time (absences) are routed ______ for approval after they have been submitted.	-- Select --

Lesson 1: Summary

In this lesson you learned:

- Key concepts related to Time & Attendance approvals
- The difference between reported and payable time
- How payable and reported time route for approval

Lesson 2: Managing Exceptions

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

- Managing Exceptions

Exceptions Overview

Once time entered in the timesheet grid is submitted, Time Administration checks it against business rules.

The Time Administration process may identify:

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

While High severity exceptions require correction in order for payable time to be generated, payable time is still generated when an exception is either low or medium.

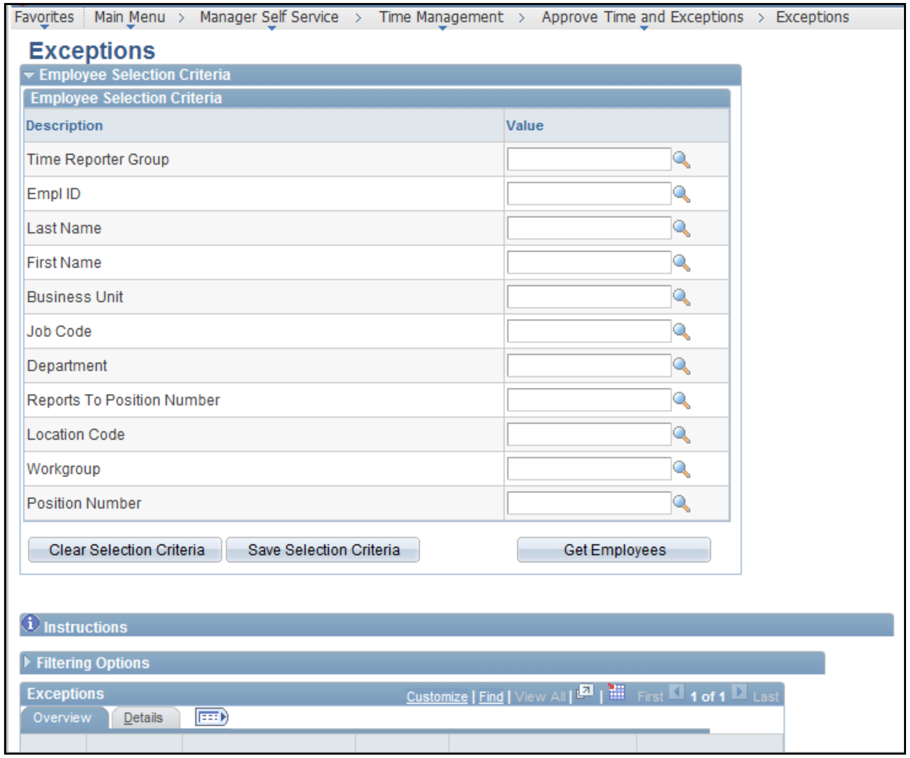
Low and Medium exceptions need to be addressed as well to clear them out of Cardinal. If they are not addressed and corrected, they will remain as exceptions.

Accessing the Exceptions Page

To view exceptions for your direct reports, navigate using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Exceptions

This opens the **Exceptions Selection Criteria** page.



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Viewing Exceptions

To view exceptions:

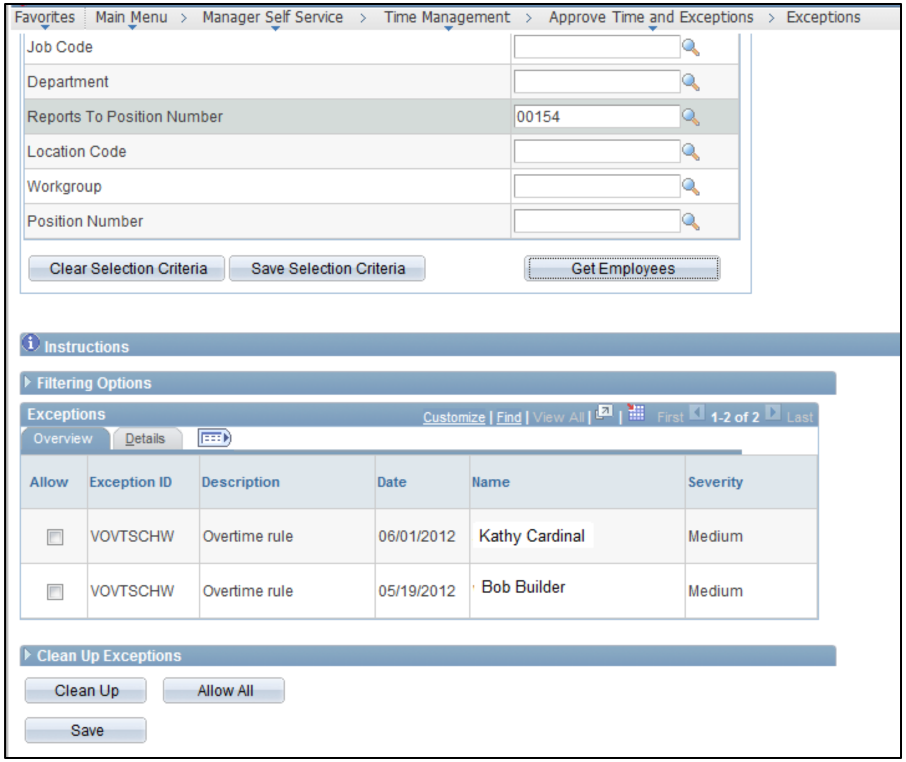
- Enter your position number in the **Reports To Position Number** field.

- Click the **Get Employees** button.

If you have employees with Exceptions (Low, Medium or High), they display under the **Exceptions** section on the bottom of the page on the **Overview** tab.

To view the details about any exceptions that display, click the **Details** tab.

Note: Exceptions are also displayed on the Timesheet Report.



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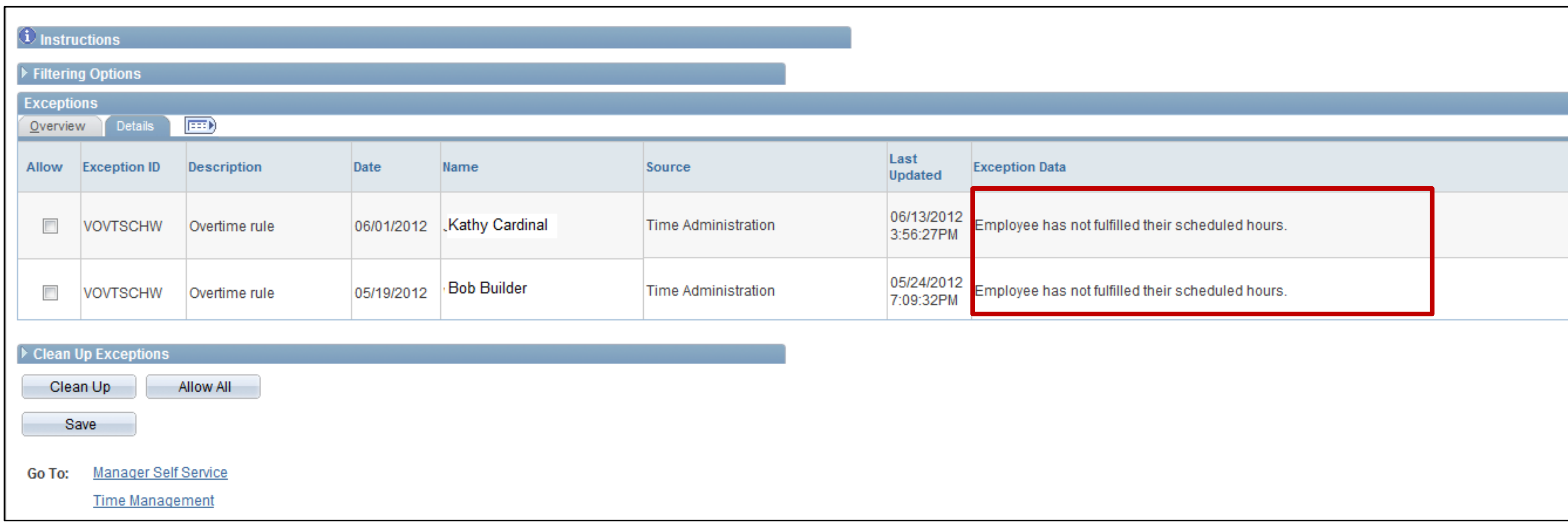
Identifying and Correcting Exceptions

The details page provides more information under the **Exception Data** column.

Use the job aid entitled **Exceptions** to determine the appropriate action to take for an exception. This job aid provides the **Exception ID**, Message, Severity, if it is allowable by an Approver, why it is generated, who can correct it and how to correct it.



Managing Exceptions

Once you take corrective action to address an exception and the Time Administration process runs, it will be cleared from the Exceptions list.

As a Supervisor, it is recommended that you check for Exceptions weekly and take the appropriate actions to address it. It is your responsibility to ensure all exceptions have been addressed for your direct reports.

Lesson 2: Summary

In this lesson you learned how to:

- Access, view and correct exceptions

Lesson 3: Approving and Denying Payable and Reported Time

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

- Approving and Denying Payable Time via the Worklist and direct navigation
- Approving and Denying Reported Time via the Worklist and direct navigation

Options for Approving Time

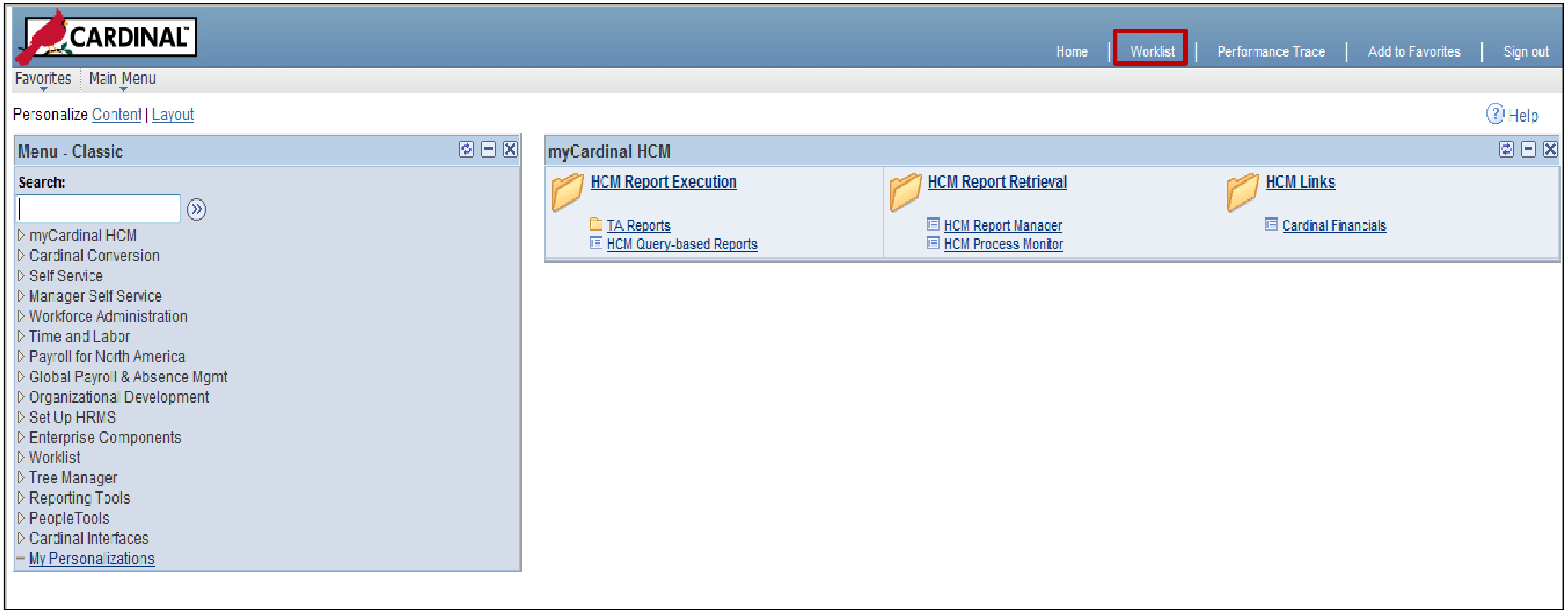
There are two options to approve payable and reported time:

- **Worklist** link – found at the top of the main **Cardinal HCM Home** page or,
- Direct navigation to either the **Approve Payable Time** or Approve Reported Time pages

This lesson will show you the process for using both methods.

Approving Payable Time - Worklist

To approve payable time using the worklist, click the **Worklist** link located at the top of the **Cardinal HCM Home** page.



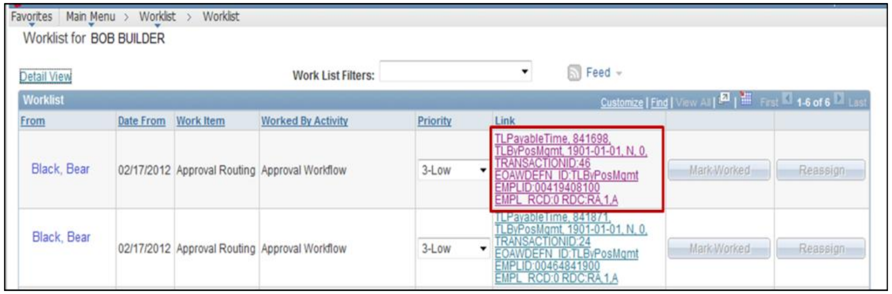
Approving Payable Time – Worklist (continued)

The **Worklist** page appears and displays any of your direct reports that have payable time or reported time (absences) that require approval.

There are five columns on this page:

- **From** – lists employees name
- **Date From** – date the time was submitted
- **Work Item** – default is Approval Routing
- **Worked By Activity** – default is Approval Workflow
- **Priority** – currently defaults to **3 - Low**
- **Link** – path to access the specific approval required
- **Payable Time** – starts with **TL_Payable Time**
- **Reported Time** – starts with **TL_Reported Time**

Click the link that starts with **TL_Payable Time**.



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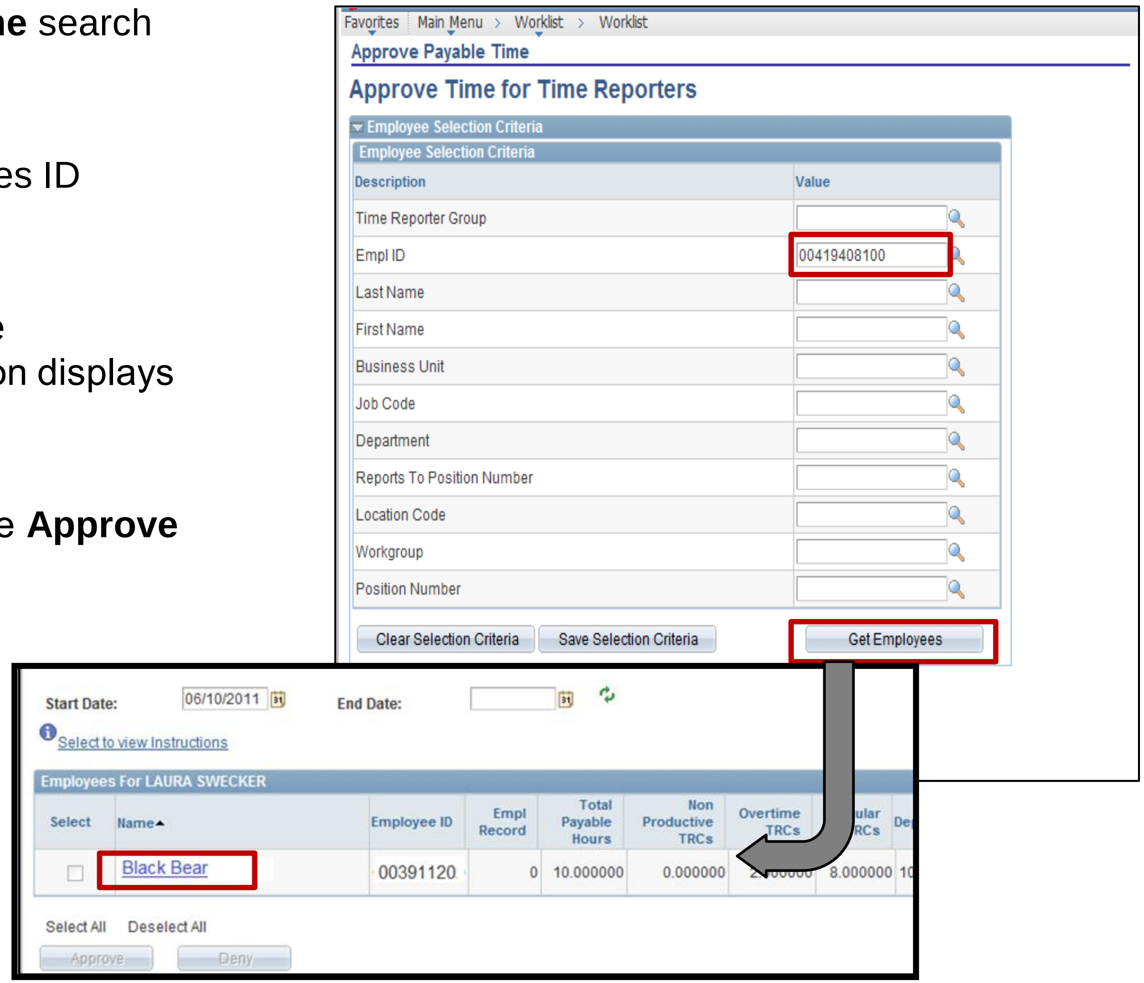
Approving Payable Time – Worklist (continued)

This opens the **Approve Payable Time** search page.

Cardinal prefills the selected employees ID number in the **Empl ID** field.

Click the **Get Employees** button. The employee's name and other information displays at the bottom of the page.

Click the employee's name to open the **Approve Payable Time Page**.

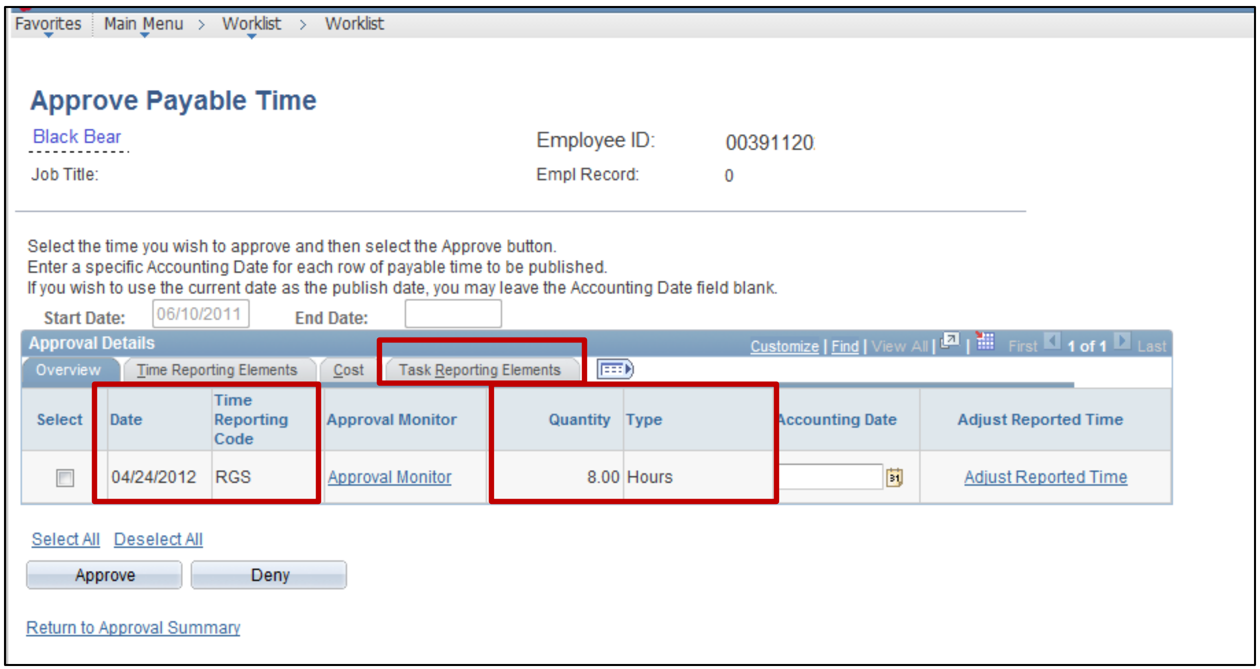


Approving Payable Time – Worklist (continued)

The **Approve Payable Time** page allows you to view details related to the employee 's time. You should review the information to ensure accuracy (i.e.: hours, TRC, charge distribution, etc.).

When you initially access this page, you are able to view the **Date**, **Time Reporting Code** and **Hours**.

To view the charge distribution, click the **Task Reporting Elements** tab.

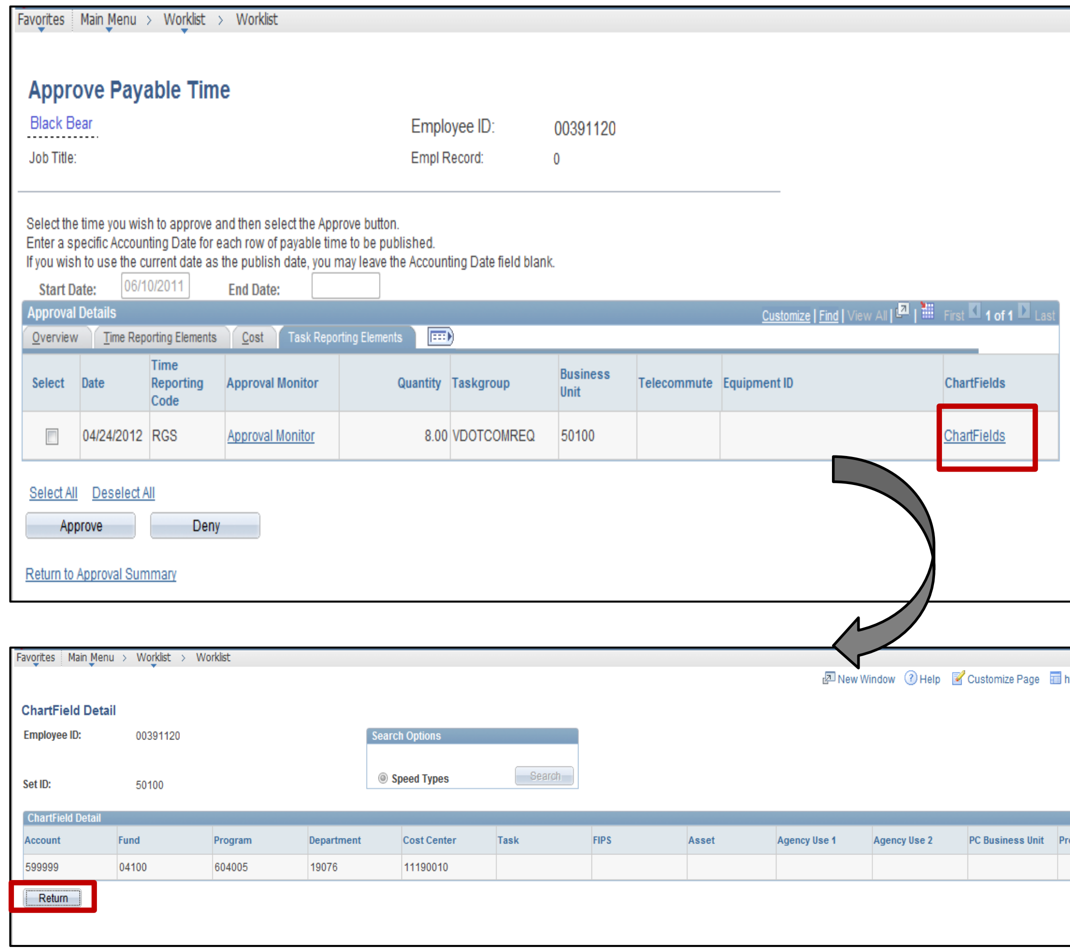


Approving Payable Time – Worklist (continued)

Click the **ChartFields** link to view the charge distribution for the hours entered for the selected row of time. You can review the **ChartFields** from this page.

Note: The Timesheet Report can also be used as a tool to review your direct reports hours, TRCs and charge distribution codes. Use the Job Aid entitled Running the Timesheet Report – Self Service for instructions for running this report. This Job Aid can be accessed on the Cardinal website, under the Time & Attendance section.

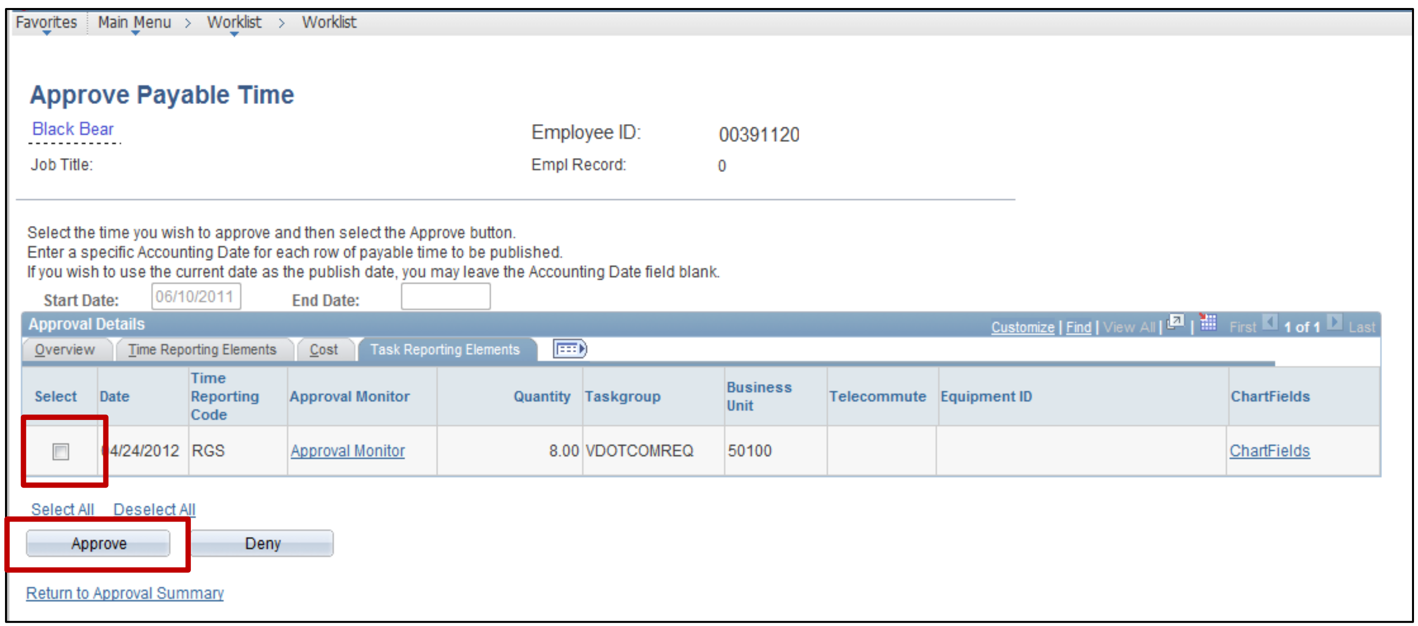
Once you review the information, click the **Return** button to go back to the **Approve Payable Time** page.



Approving Payable Time – Worklist (continued)

After reviewing and verifying all the hours, **TRC**s and charge distribution information, you are ready to approve the time:

- Click the select indicator for the row you want to approve or click the **Select All** link at the bottom of the page.
- Click the **Approve** button.
- A confirmation displays asking if you are sure you want to approve the time selected. Click **Yes**.
- A message displays confirming the time has been approved. Click **OK**.



Denying Payable Time - Worklist

To deny the employee's payable time, click the **Deny** button. The employee's timesheet will need to be modified as applicable and resubmitted, and the approver will need to approve the updated time in order to ensure the employee is paid appropriately.

Note: The employee receives a Cardinal e-mail notification when you **Deny** payable time. Once corrections are made, the timesheet must be reprocessed through the Time Administration process to verify that it has no high exceptions. It then becomes payable time and routes to the Supervisor again for approval.

Approving Negative Hours

Although an employee never enters negative hours on the **Timesheet** page in Cardinal (the system will not allow this), you may see negative hours on the **Approve Payable Time** page.

When adjustments are made to the timesheet after it has been approved, Cardinal processes this change by creating a negative offset to reverse out the original approved entry. This displays as negative hours on the **Approve Payable Time** page (even though negative hours were not entered).

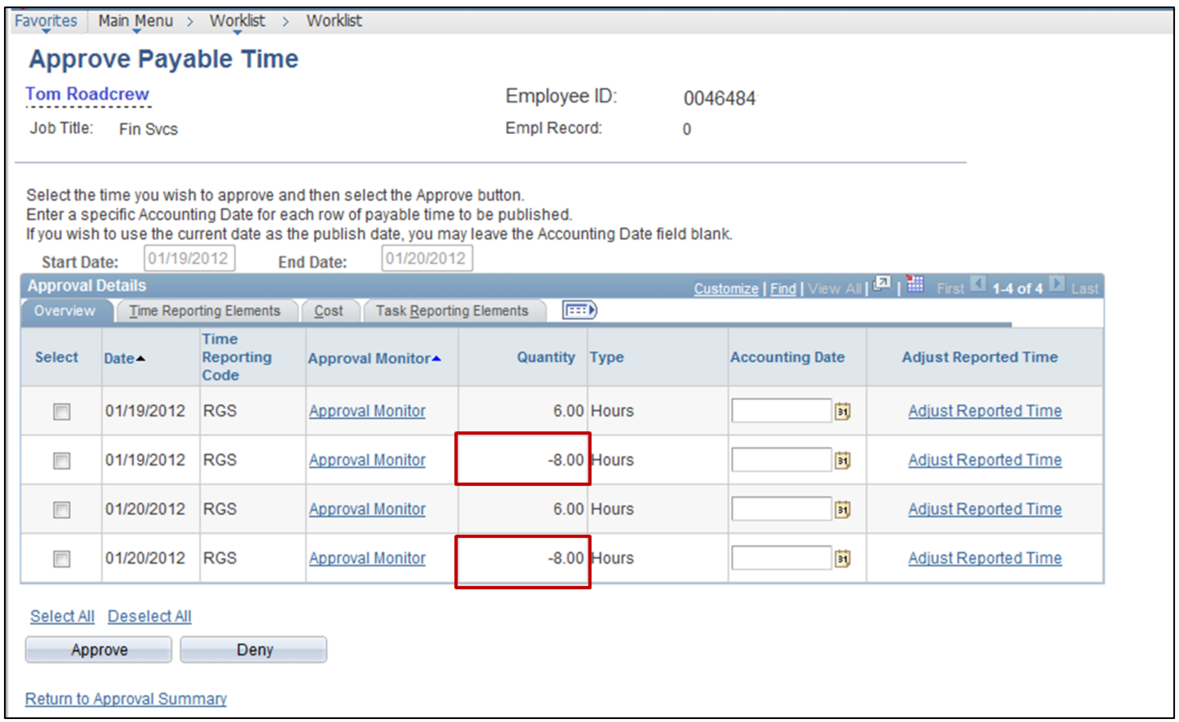
For example:

- An employee entered 8 hours of time for a particular charge distribution.
- You approve the time.
- The employee makes an adjustment to the charge distribution after the approval.
- Cardinal generates a -8 entry which displays on the **Approve Payable Time** page.

Approving Negative Hours (continued)

When you see negative hours on the **Approve Payable Time** page it is very important that you **approve them**. This allows Cardinal to reconcile the hours appropriately when the allocation process is run. Failure to approve the hours causes problems and errors with allocation.

Always approve negative hours included on the **Approve Payable Time** page.



Favorites | Main Menu > Worklist > Worklist

Approve Payable Time

Tom Roadcrew

Employee ID: 0046484

Job Title: Fin Svcs

Empl Record: 0

Select the time you wish to approve and then select the Approve button.
Enter a specific Accounting Date for each row of payable time to be published.
If you wish to use the current date as the publish date, you may leave the Accounting Date field blank.

Start Date: 01/19/2012 End Date: 01/20/2012

Approval Details — Customize | Find | View All | First 1-4 of 4 Last

Overview | Time Reporting Elements | Cost | Task Reporting Elements

Select	Date	Time Reporting Code	Approval Monitor	Quantity	Type	Accounting Date	Adjust Reported Time
	01/19/2012	RGS	Approval Monitor	6.00	Hours		Adjust Reported Time
	01/19/2012	RGS	Approval Monitor	-8.00	Hours		Adjust Reported Time
	01/20/2012	RGS	Approval Monitor	6.00	Hours		Adjust Reported Time
	01/20/2012	RGS	Approval Monitor	-8.00	Hours		Adjust Reported Time

Select All Deselect All

Approve Deny

Return to Approval Summary

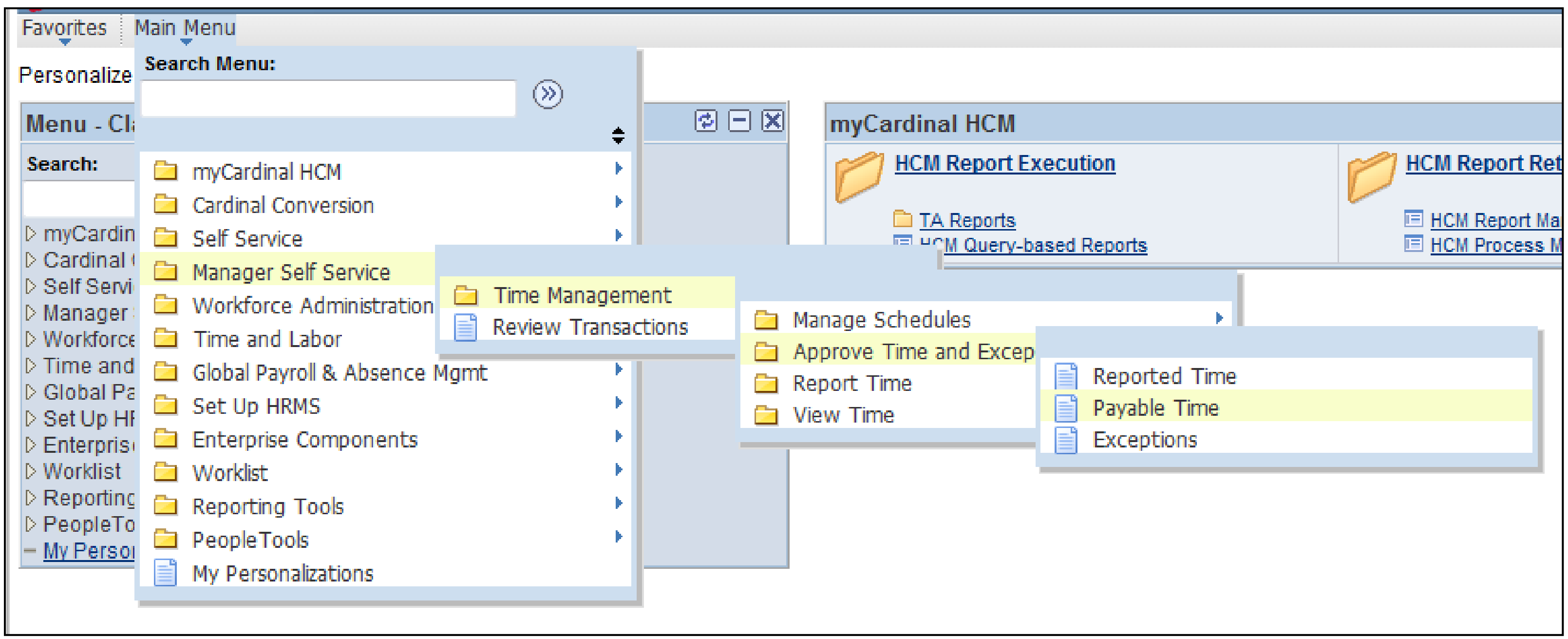
Click on image to enlarge

Approving Payable Time - Direct Navigation

You can also approve time by directly navigating to the **Approve Payable Time** page.

You can navigate to this page using the following path:

Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Payable Time

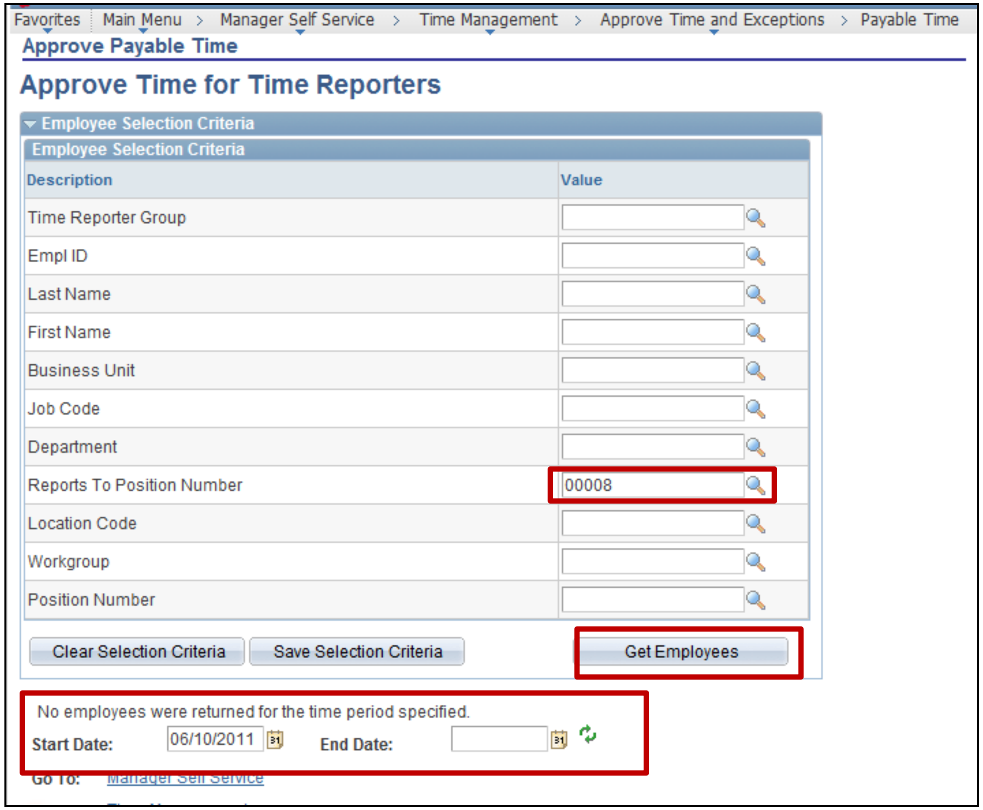


Approving Payable Time - Direct Navigation (continued)

The **Approve Payable Time Search** page displays. This is the same search page that opens when you click the worklist item.

To approve payable time, enter your search criteria:

- Enter **Employee ID** to search for one Time Reporter, or
- Enter your position number in **Reports to Position Number** field to select all Time Reporters who report to your Position number that have payable time that requires approval. **Note:** This is the preferred method when using direct navigation.
- Click the **Get Employees** button. If no employees are returned, a message displays indicating that no employees met the search criteria, this means that you do not currently have any employees that have payable time that requires approval.



Approving Payable Time - Direct Navigation (continued)

To approve Payable Time, repeat the steps you used to approve from the worklist:

- Select the employee you want to approve payable time for by clicking on the name.

- Review the information that was processed from the Time Reporter’s timesheet in all tabs, including the **Time Reporting Code**, hours, etc. for the period. To view the charge distributions, click on the **Task Reporting Elements** tab, then click on the **ChartFields** link for each line.

- You can approve or deny time:
  - To approve the employee’s payable time, click the **Select** checkbox for each relevant line or click the **Select All** link and then click the **Approve** button.

  - To approve the employee’s payable time at the summary level, click the **Return to Approval Summary** link. Select the checkbox for the employee you want to approve payable time for and click the **Approve** button.

Denying Payable Time

To deny the employee's payable time, click the **Deny** button. The employee's timesheet will need to be modified as applicable and resubmitted, and the approver will need to approve the updated time in order to ensure the employee is paid appropriately.

Note: The employee receives a Cardinal e-mail notification when you **Deny** payable time. Once corrections are made, the timesheet must be reprocessed through the Time Administration process to verify that it has no high exceptions. It then becomes payable time and routes to the Supervisor again for approval.

Simulation: Approving Payable Time

You are now about to view a simulation on how to approve payable time. Click the Cardinal logo to launch the simulation.

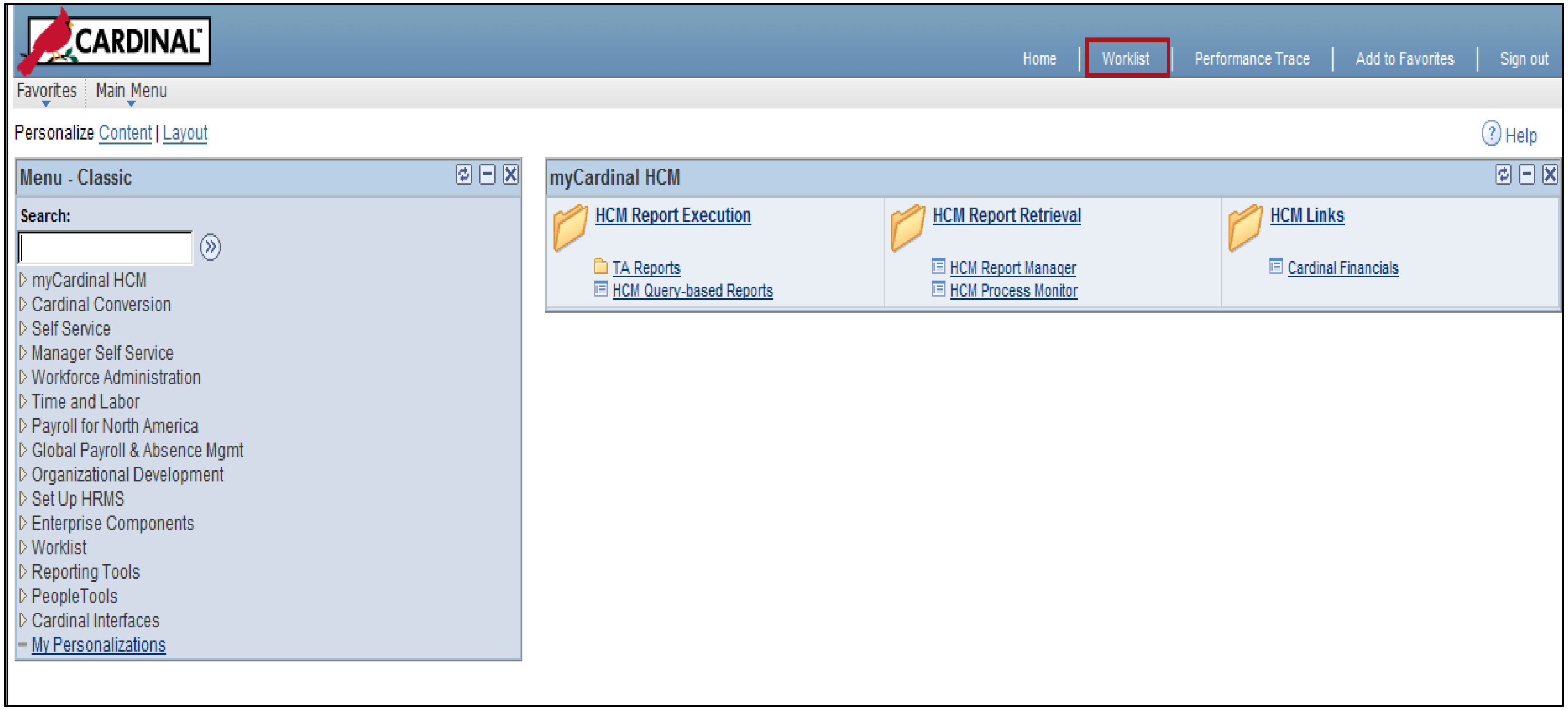
Reported Time (Absences) Approval Options

You have the two options for approving reported time (absences):

- **Worklist** link
- Direct navigation to the **Approve Reported Time** page

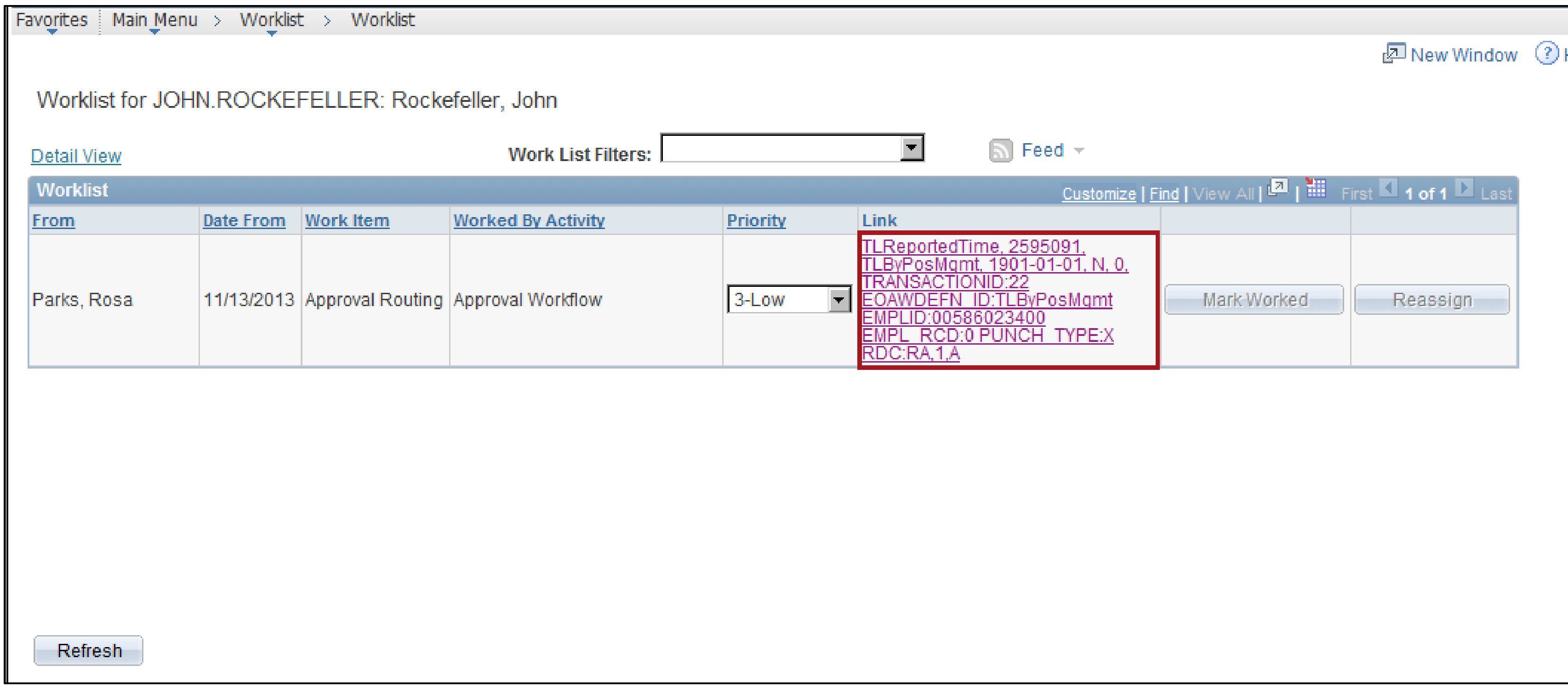
Approving Reported Time - Worklist

To approve reported time (absences) using the worklist, click the **Worklist** link located at the top of the **Cardinal HCM Home** page.



Approving Reported Time - Worklist (continued)

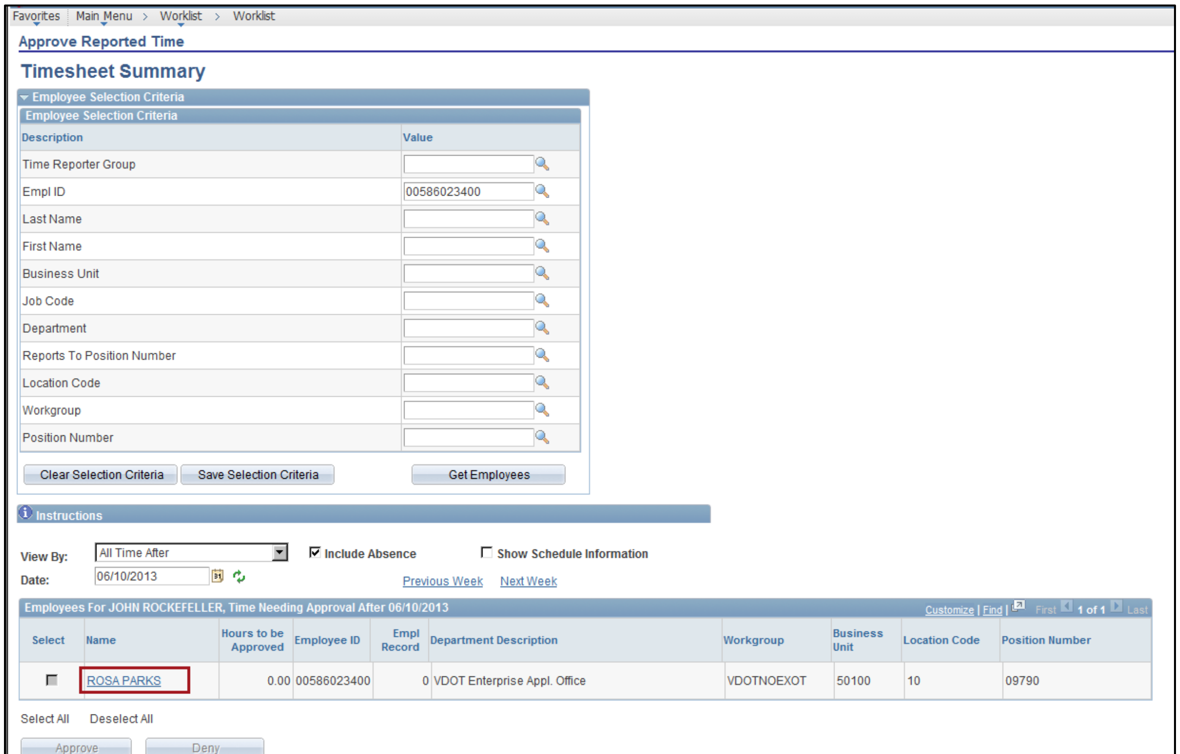
The **Worklist** page displays and shows all items that require your approval. To access reported time (absences) that require approval, use the **Links** column to identify any items that start with **TL_Reported Time**. Click the link.



Approving Reported Time - Worklist (continued)

The **Approve Reported Time** search page displays. The **Empl ID** field automatically prefills the ID of the employee selected.

Click on the employee's name when it displays at the bottom of the page.



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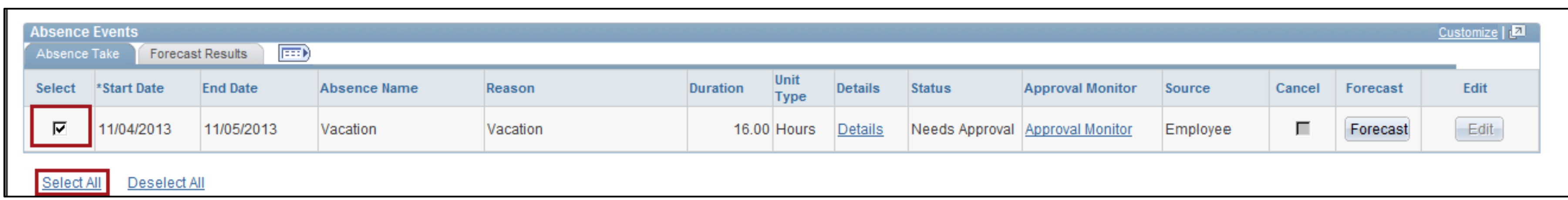
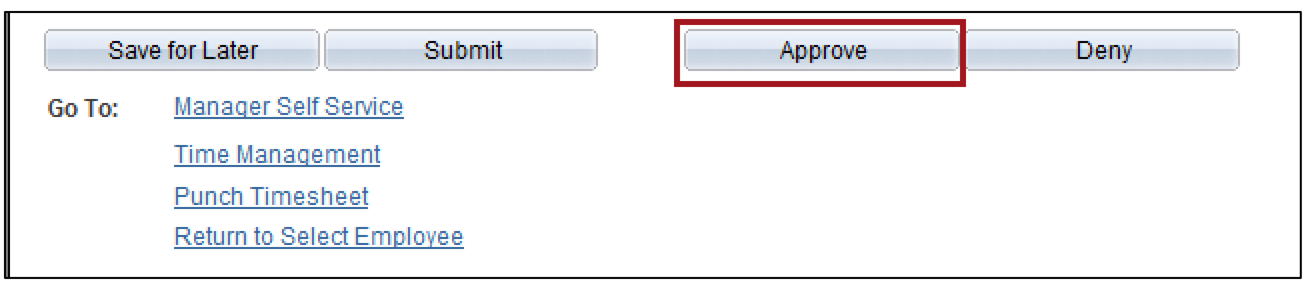
Approving Reported Time - Worklist (continued)

The Timesheet page opens for the selected employee. Click the **Absence Event – Select to view** link to view absence requests that require approval. Absences that require approval display a **Status** of **Needs Approval**.

To approve the absence request(s), click the **Select** checkbox in front of the absence you want to approve. To approve multiple absences on the same timesheet, click the **Select All** link.

Scroll down to the bottom of the page and click the **Approve** button. A confirmation page displays asking you to confirm you want to approve. Click **Yes** to confirm the approval.





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Approving Reported Time - Worklist (continued)

Once the absence(s) are approved, the **Status** changes from **Needs Approval** to **Approved**.

At this point you can click the **Worklist** link at the top of the page and repeat this process for other reported time (absence) requests that require approval.

Absence Event - select to hide

Absence Events — Customize

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
☐	11/04/2013	11/05/2013	Vacation	Vacation	16.00	Hours	Details	Approved	Approval Monitor	Employee	☐	Forecast	Edit

Denying Reported Time

If you wish to deny the absence request(s), select the absence(s) you want to deny. Click the **Deny** button and a confirmation page displays asking you to confirm you want to deny the request. Click **Yes** to confirm the denial.

Time that has been denied is still visible on the timesheet and the Status field indicates **Denied**. Absences that have been denied do not impact the leave balances.

When a request is denied, the person who entered the request receives an e-mail notification with information regarding the action that was taken by the approver. A denied absence request can still be edited and resubmitted.

Click the **Worklist** link at the top of the page and repeat this process for any other absence requests that require approval.

Absence Event - select to hide

Absence Events | Customize

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
	11/12/2013	11/12/2013	Vacation	Vacation	8.00	Hours	Details	Denied	Approval Monitor	Manager		Forecast	Edit

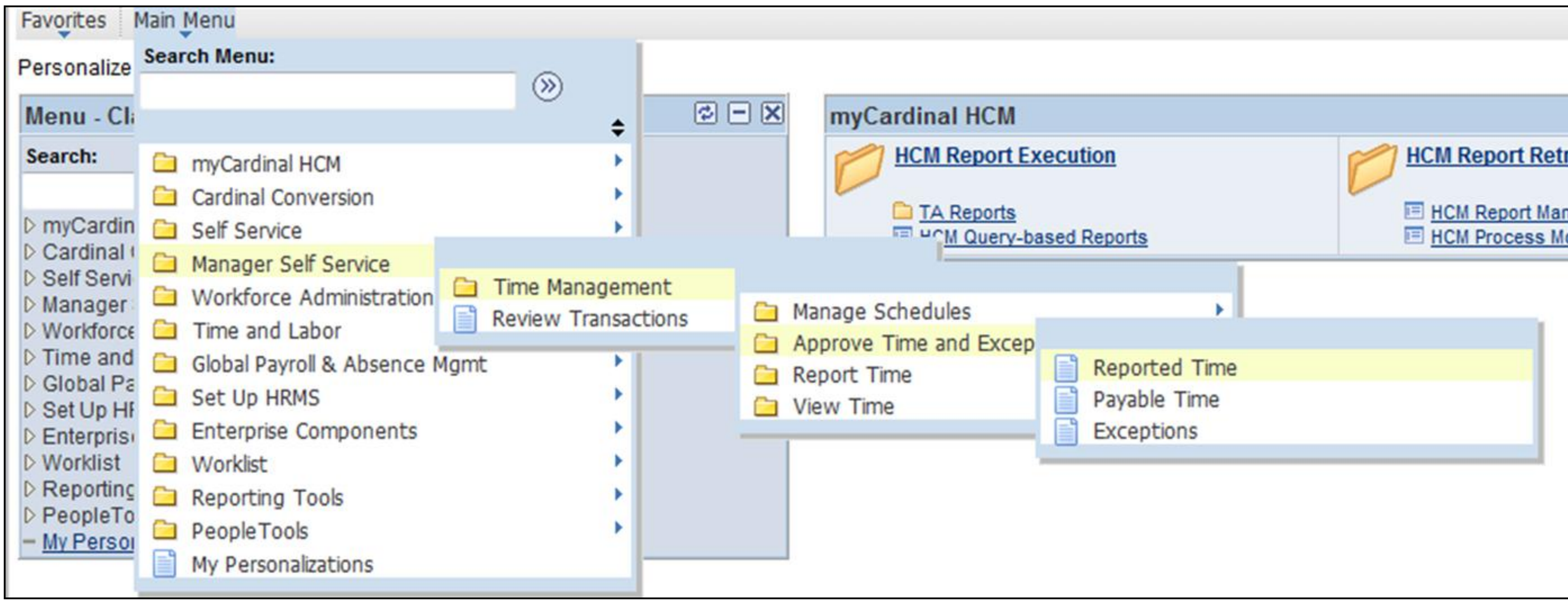
Select All Deselect All

Click on image to enlarge

Approving Reported Time - Direct Navigation

To approve reported time (absences) via direct navigation, access the **Approve Reported Time** search page using the following path:

Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time

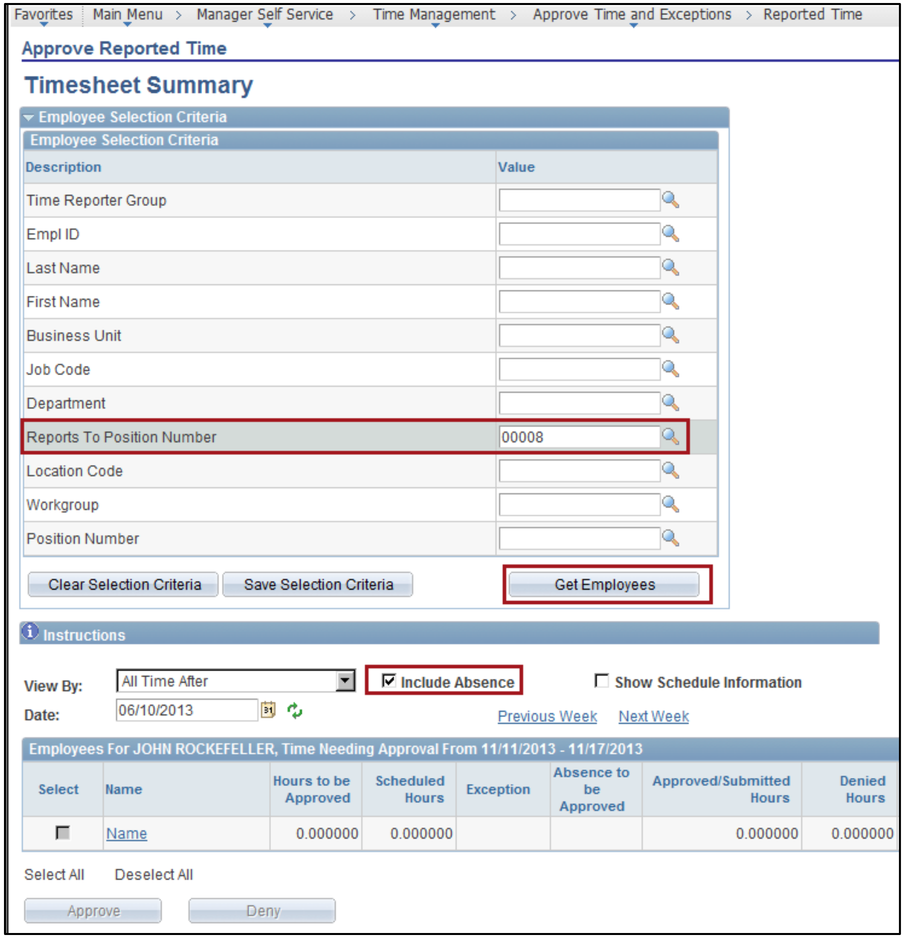


Approving Reported Time - Direct Navigation (continued)

The **Approve Reported Time** search criteria page displays. This is the same page you access the worklist link.

To approve reported time (absences):

- Enter your search criteria. You may:
    - Enter **Employee ID** to search for one Time Reporter, or
    - Enter your position number in **Reports to Position Number** field to select all Time Reporters who report to your Position number that have absences that require approval. **Note:** This is the preferred method when using direct navigation.
- The **Include Absences** checkbox defaults selected. Do not change it.
- Click the **Get Employees** button. If no employees are returned, a message displays indicating that no employees met the search criteria, this means that you do not currently have any employees that have payable time that requires approval.



Approving Reported Time via Direct Navigation (continued)

To approve Reported Time, repeat the steps you used to approve from the worklist:

- Select the employee you want to approve reported time for by clicking on the name.
- Click the name of the employee you wish to access for approval. The **Timeshee**t page displays for the selected employee.
- Click the **Absence Event – select to view link.**
- Review the request(s). Click the checkbox under the **Select** column or use the **Select All** indicator for multiple requests that require approval.
- Scroll the to bottom of the page.
- Click the **Approve** button.
- Click the **Yes** button when the confirmation message displays.
- Confirm the Status updates to **Approved**.

If you have additional employees that require approval, click the **Return to Select Employees** link at the bottom of the Timesheet page and select the next employee's name from the bottom of the page.

Extended Leave Approvals

Extended leave absences, including Family and Medical Leave (FMLA), Short Term Disability (STD), Long Term Disability (LTD), and Worker's Compensation, typically require entry and additional approvals by an Absence Management Administrator (i.e., Human Resources approval). Prior to the approval of an FMLA absence request, entitlement balances must be created for the employee using FMLA.

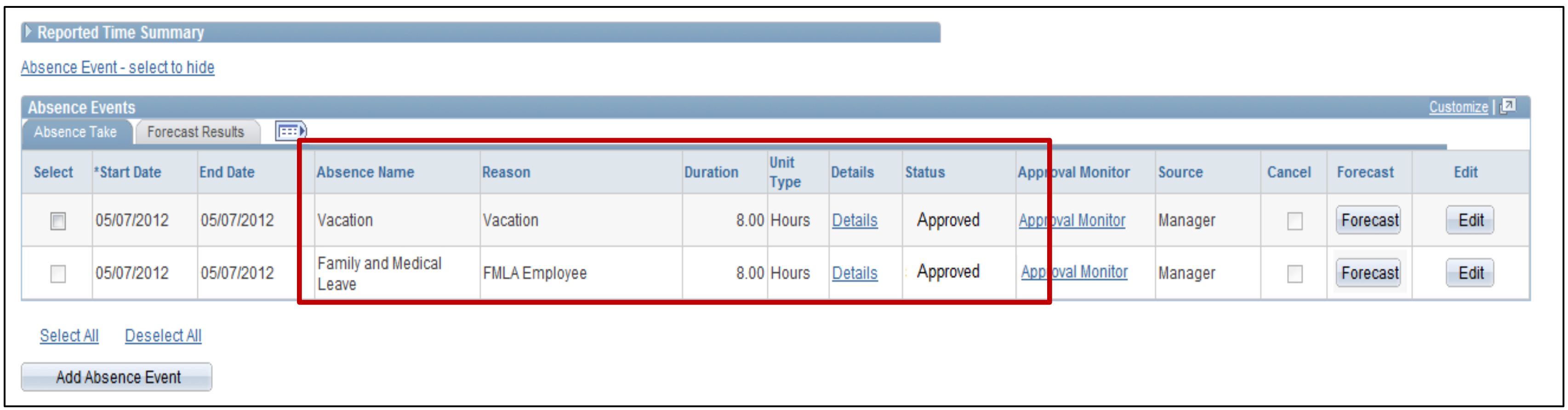
The other extended leave absence types, STD, LTD and Worker's Compensation, are entered into Cardinal by the Absence Management Administrator, not the employee or supervisor.

The Absence Management Administration course provides details on creating, entering, approving and managing these absences.

Approving FMLA

Some FMLA absences may be entered by the employee (employees must coordinate with Human Resources, who will enable those users to select FMLA as an absence type). FMLA absences entered by the employee will be sent to the Supervisor for approval.

<u>The FMLA hours must be entered in conjunction with another absence type</u>. If the FMLA time is 8 hours, then the other absence type must be entered for 8 hours. This means there are two lines that require approval. Be sure to confirm the employee is using another leave type along with FMLA and approve both.



Reported Time Summary

Absence Event - select to hide

Absence Events — Customize | Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Reason	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
☐	05/07/2012	05/07/2012	Vacation	Vacation	8.00	Hours	Details	Approved	Approval Monitor	Manager	☐	Forecast	Edit
☐	05/07/2012	05/07/2012	Family and Medical Leave	FMLA Employee	8.00	Hours	Details	Approved	Approval Monitor	Manager	☐	Forecast	Edit

Select All Deselect All

Add Absence Event

Simulation: Approving Reported Time

You are now about to view a simulation on how to approve reported time (absences). Click the Cardinal logo to launch the simulation.

Lesson 2: Checkpoint

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

There are two options you can choose from to approve payable and reported time, they are worklist link and direct navigation.

- ○ True
- ○ False

Before approving payable time, you should verify which of the following:

- Charge distribution
- Time Reporting Code (TRC)
- Hours entered
- All of the above

In cases where an employee reports FMLA on the timesheet, he/she must have another leave type for the same day and hours used in conjunction with it.

- True
- False

Lesson 3: Summary

In this lesson you learned how to:

- Approved reported time and payable time using the Worklist link and direct navigation
- Approve negative hours on the payable time page
- Approve FMLA as reported time

Lesson 4: Delegating Time & Attendance Items

In this lesson you will learn about the following topic:

- Managing Worklist Delegation

Delegation Overview

Earlier in the course it was noted that there is no escalation process for approvals. This means that if time is not approved by you as the supervisor it will not roll up to someone else.

The delegation process allows you to move your worklist when you have planned time away from work and ensures your direct reports time is approved in your absence. Time that is not approved by the end of the pay period creates challenges and issues with Payroll's ability to run the allocation process.

If you are out and your time is not delegated to someone else for approval, it creates additional work for Payroll and others. It is important and necessary to delegate your worklist when you plan to be out.

Managing Delegation

You can delegate Time & Attendance approvals to another approver for a defined period of time in Cardinal.

You can choose to delegate all of your approvals, or just particular types of approvals (payable time or reported time) to a proxy. When you delegate Approval authority to a proxy, this person can act on your behalf to approve pending transactions. The proxy is notified of pending transactions and can execute the approval.

Existing pending items on the delegator's worklist move to the proxy's worklist. If the delegation is revoked, pending items move back from the proxy's worklist to the delegator's worklist.

You cannot delegate the same transaction to more than one proxy for the same delegation period.

Use the **Manage Delegation** page to delegate approvals.

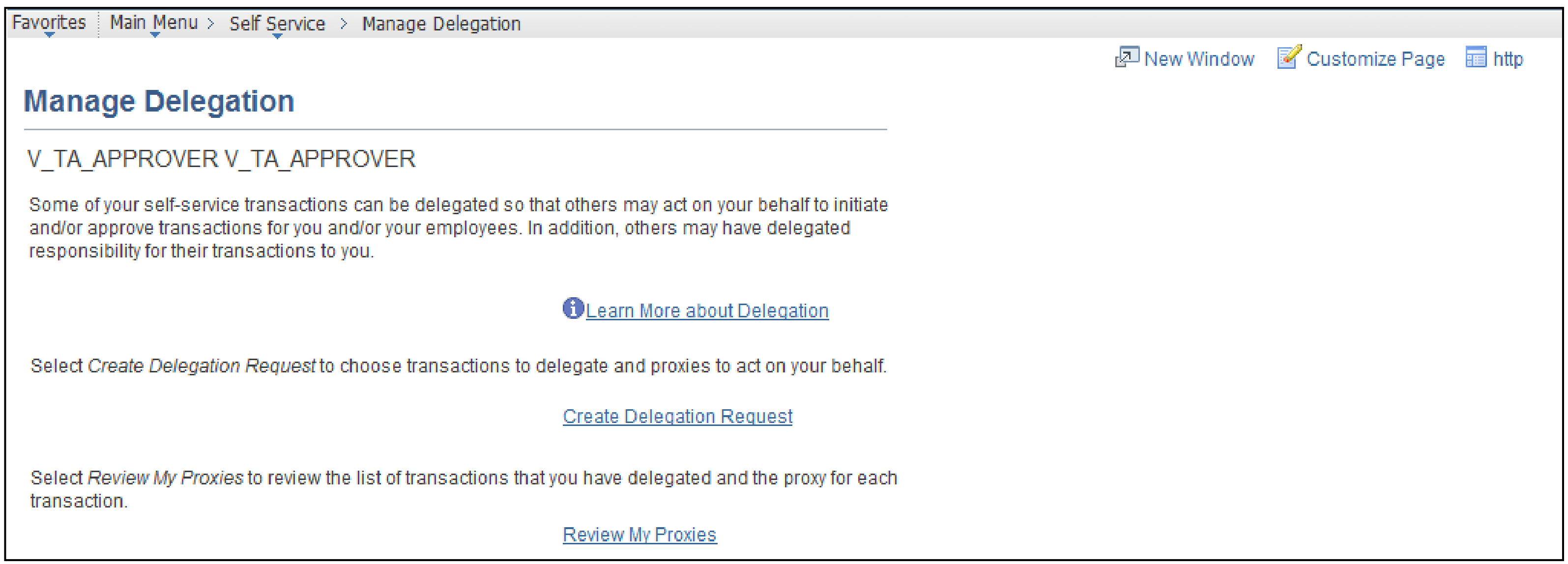
Please note that the proxy must accept the delegation before it is effective.

Managing Delegation Steps

To delegate one or several Time & Attendance items, go to the **Manage Delegation** page. You can navigate to this page in the **Cardinal Time & Attendance (HCM)** site using the following path:

Home Page > Self Service > Manage Delegation

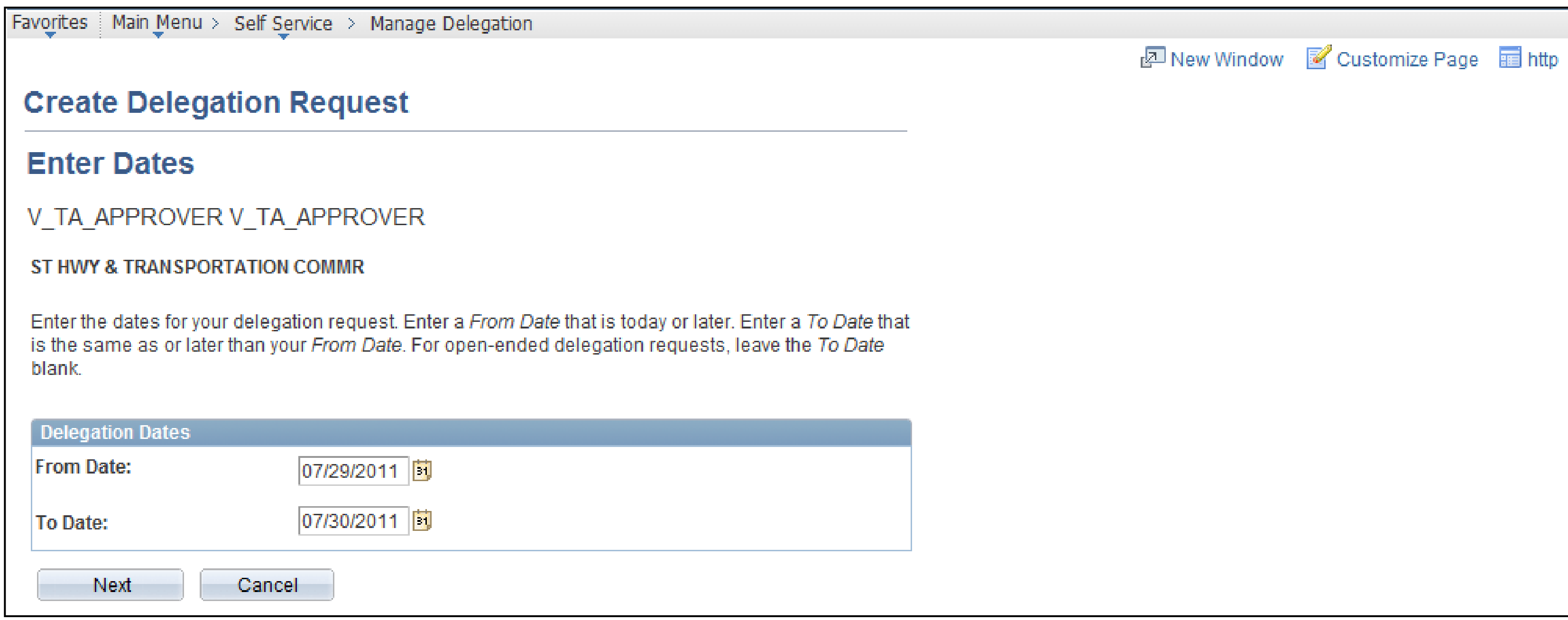
To delegate Time & Attendance items, click the **Create Delegation Request** link.



Managing Delegation Steps (continued)

When you create a delegation request, you will need to specify a **From Date** and **To Date**. A populated **From Date** indicates that the delegation is effective from that date until the **To Date**.

Enter the time period that your approvals should be sent to the other approver in the **From Date** and **To Date** fields, then click **Next.**



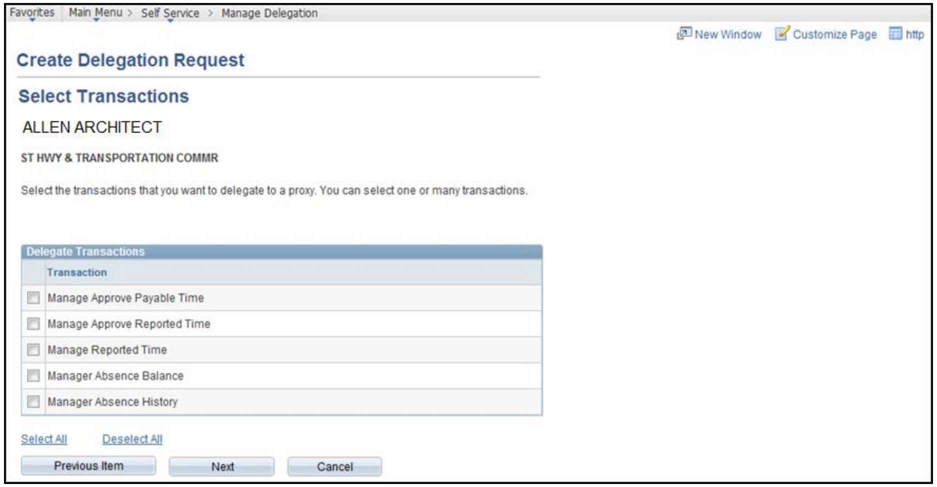
Managing Delegation Steps (continued)

Click the checkbox for each type of approval you wish to reassign. There are five options to select from:

- **Manage Approve Payable Time** – delegates payable time approvals
- **Manage Approve Reported Time** – delegates reported time (absence) approvals
- **Manage Reported Time** – delegates initiation/entry of reported time (absences)
- **Manage Absence Balance** – delegates the viewing of absence balances
- **Manage Absence History** – delegates the viewing of absence history

Selecting the checkbox for **Manage Approve Reported Time** will delegate absence approvals.

Click the **Next** button.

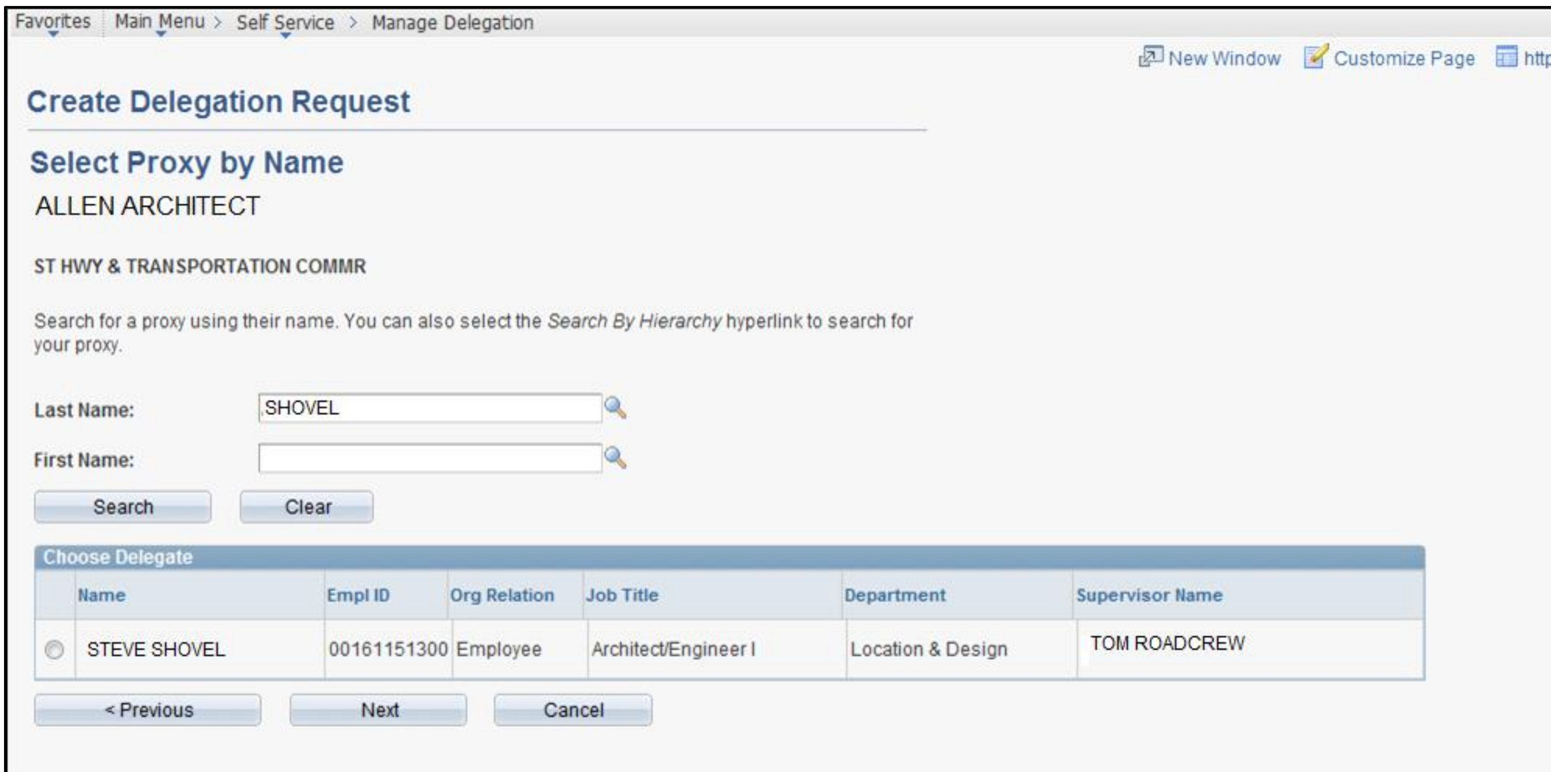


Click on image to enlarge

Managing Delegation Steps (continued)

Enter information about the approver you are delegating your work to in the **Last Name** and/or **First Name** fields, then click **Search**.

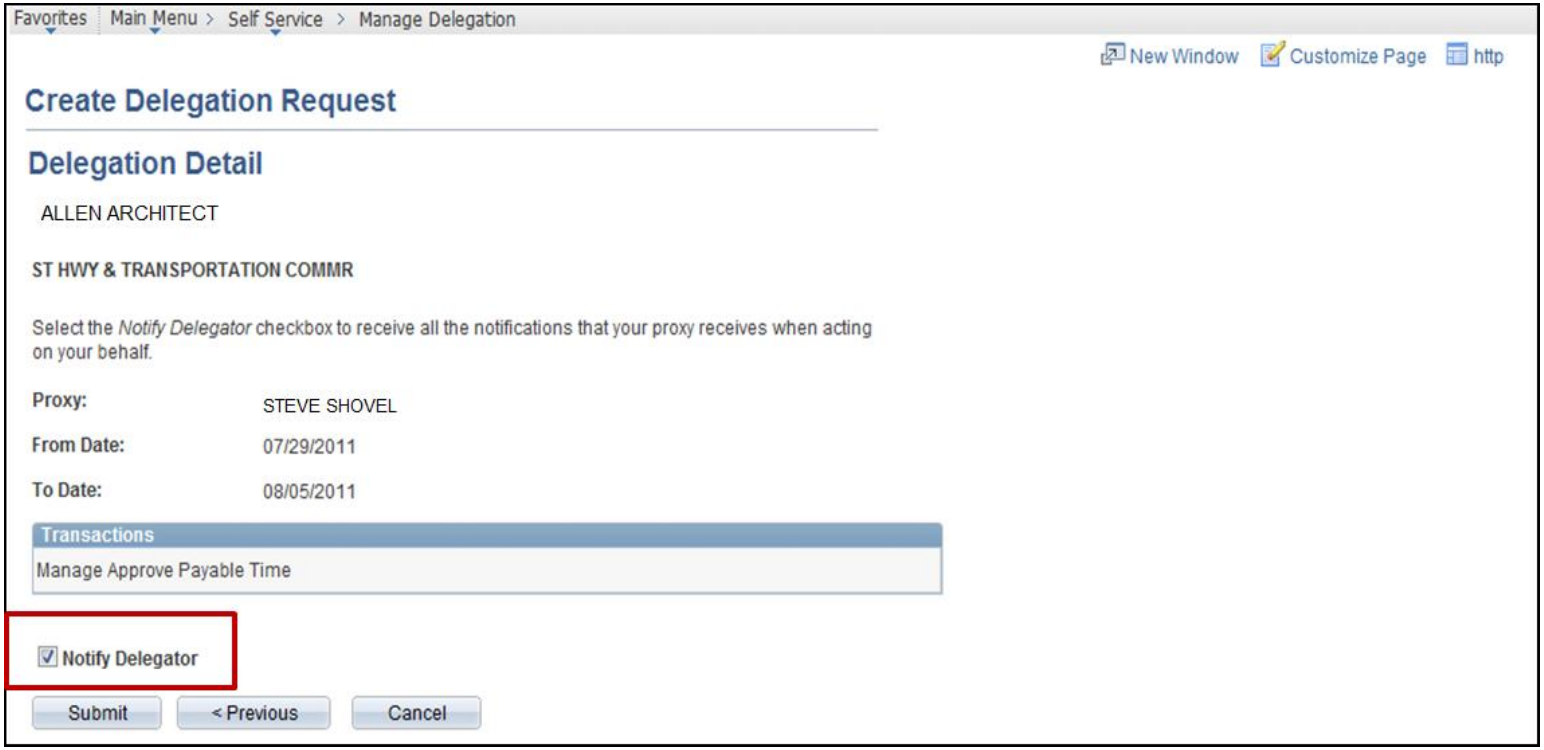
In the results, click the button next to the approver you wish to delegate to, then click **Next**.



Managing Delegation Steps (continued)

Click the **Notify Delegator** checkbox to notify the delegator, then click **Submit**.

The proxy (person you are delegating items to) will receive an e-mail notification and worklist item that you have delegated items to them.



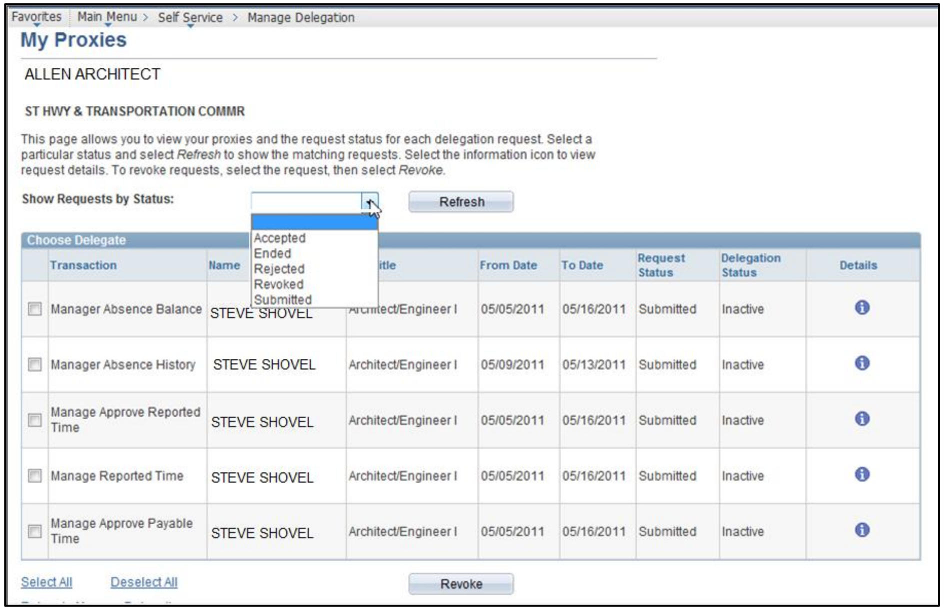
Reviewing Proxies

To view a list of transaction types that you have delegated to proxies or to revoke the delegated authority of proxies, go to the **Manage Delegation** page and click the **Review My Proxies** link.

You can use different views and filter existing proxies by their status, using the **Show Requests by Status** dropdown menu.

Click the information icon to view the details of the delegation. This takes you to the **Delegation Request Details** page. Return to the **Review MY Proxies** page by clicking the **Return to My Proxies** link.

To revoke a proxy, select the relevant proxy checkbox and click the ***Revoke*** button.

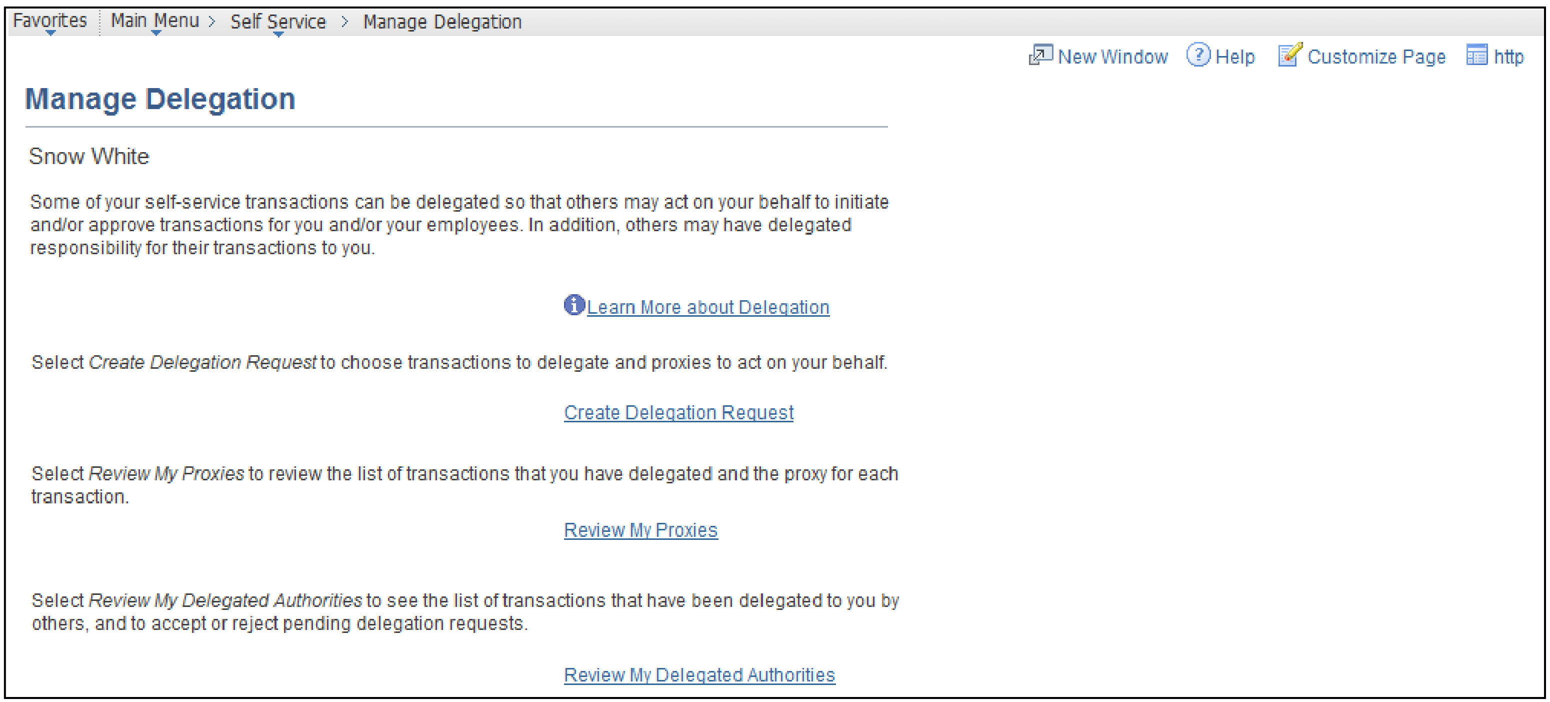


Click on image to enlarge

My Delegated Authorities

Remember, proxies must accept a delegation request before it is effective.

This is done on the **My Delegated Authorities** page, accessed from the **Manage Delegation** page. Note that you will only be able to see the **My Delegated Authorities** link if you have received a delegation request. Click the **Review My Delegated Authorities** link to accept or reject a delegation.



My Delegated Authorities (continued)

To accept or reject the delegation:

- Select the checkbox on the delegation request line.
- Click the **Accept** or **Reject** button as relevant.

Favorites | Main Menu > Self Service > Manage Delegation

New Window | Customize Page | http

My Delegated Authorities

Snow White

Fin Svcs Specialist I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted | Refresh

Choose Delegate

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐	Manage Approve Payable Time	V_TA_APPROVER V_TA_APPROVER	ST HWY & TRANSPORTATION COMMR	07/29/2011	07/30/2011	Submitted	Inactive	

Select All | Deselect All | Accept | Reject

Return to Manage Delegation

Lesson 4: Checkpoint

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

The proxy is notified of items delegated to them through an email notification generated by Cardinal.

- ○ True
- ○ False

You can delegate different types of approval items to another approver.

- True
- False

Lesson 4: Summary

In this lesson you learned how to:

- Delegate your worklist

Course Summary

In this course, you learned how to:

- Describe Time & Attendance concepts and approval overview
- Explain the difference between payable time and reported time
- Approve or deny payable time and reported time via the worklist or direct navigation
- Approve extended leave
- Manage timesheet exceptions
- Delegate approval items on your worklist

Course Evaluation

Congratulations! You have completed the **TA365: Time & Attendance Approvals** course. Please use the evaluation link to assess this course.

Click here to access the survey

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

Appendix

- Key Terms
- Time & Attendance Process Flows
- Flow Chart Key
- Screenshots and Diagrams

Key Terms

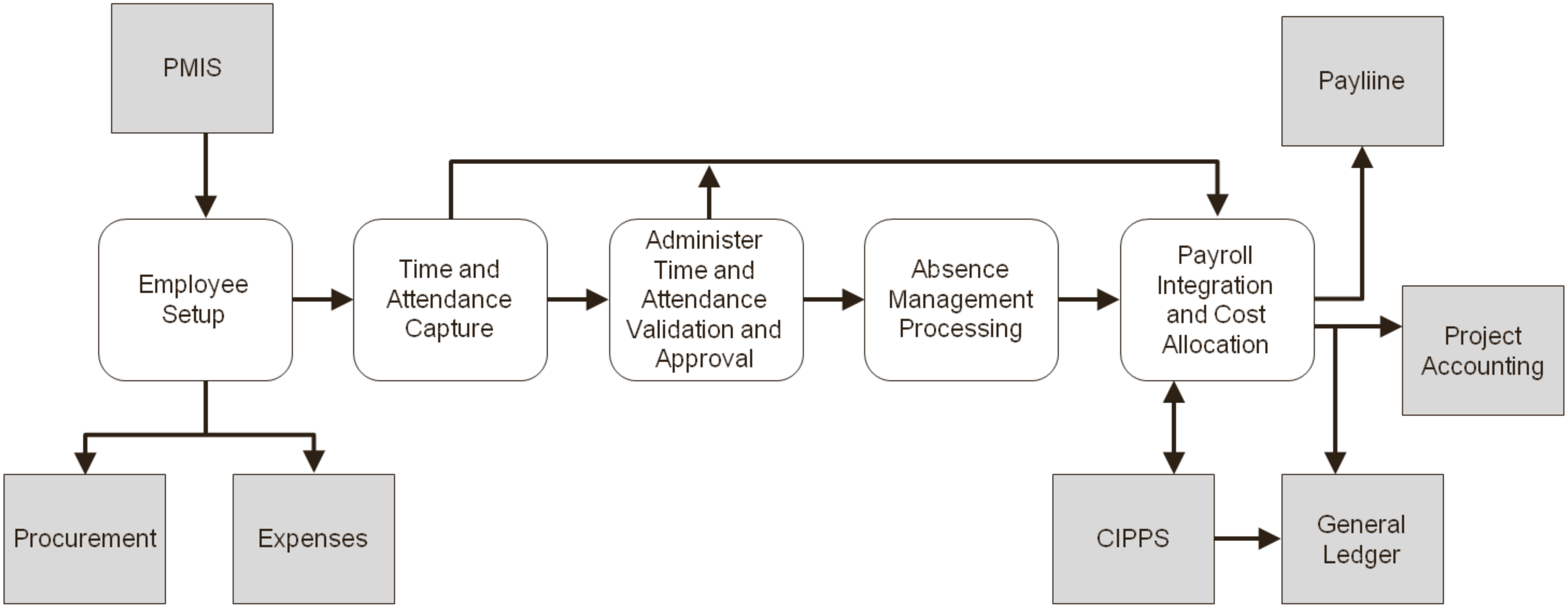
Payable Time: Reported hours worked and non-productive TRCs entered in the timesheet grid, located at the top of the **Timesheet** page, that has been successfully processed by Time Administration.

Reported Time (Absences): Time entered in the absence event grid section of the **Timesheet** page.

Time Administration: A batch process that validates submitted time, time entered in the timesheet grid on the Timesheet page, against time reporting rules and generates payable time. The process also generates exceptions.

Time & Attendance Process

The diagram provides an overview of Time & Attendance process.



Time & Attendance Process (continued)

Employee Setup

Employees are setup in Cardinal and this process includes:

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

Time & Attendance Capture

Time will be captured by employees after being setup as time reporters which includes:

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

Time & Attendance Process (continued)

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

Time validation is done through the Time Administration process. It also:

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

Time approval is completed by supervisors who can:

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

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

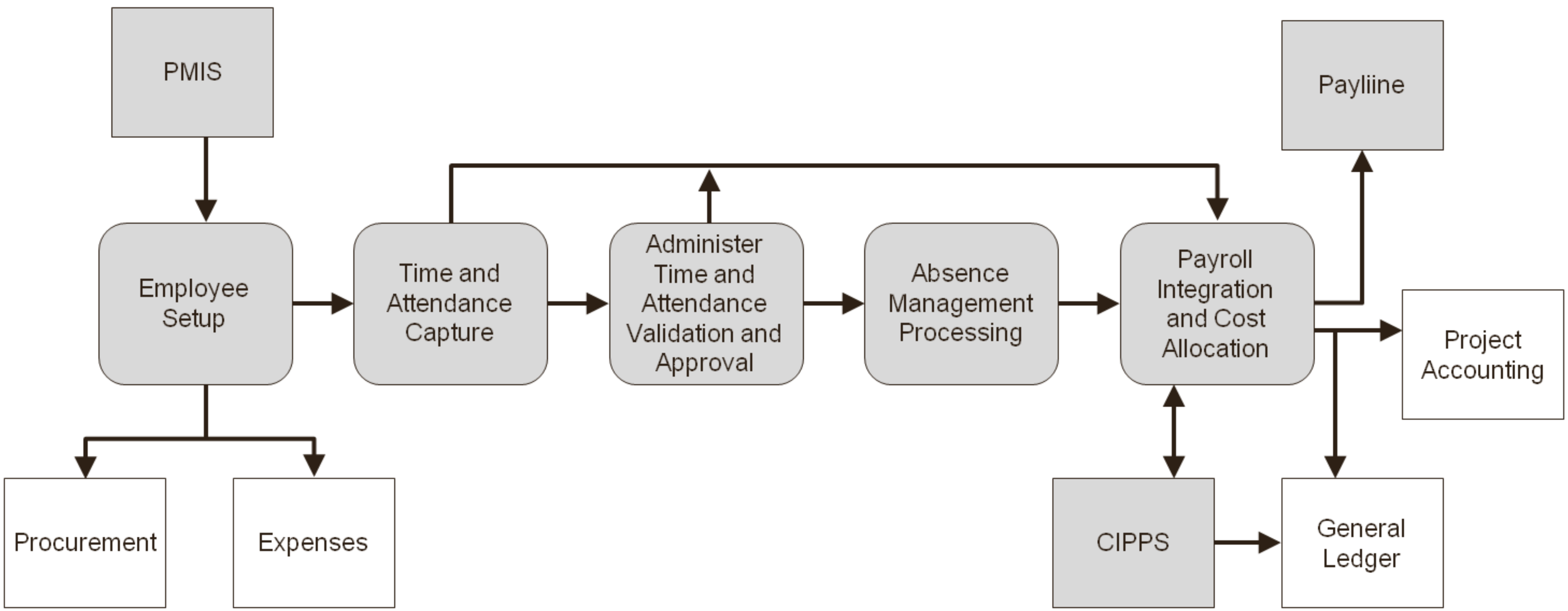
Approved payable time is sent to Payroll to:

- Generate pay

Time & Attendance Process Integration

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

- Procurement
- Expenses
- Project Accounting
- General Ledger



Time & Attendance Process Integration (continued)

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

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

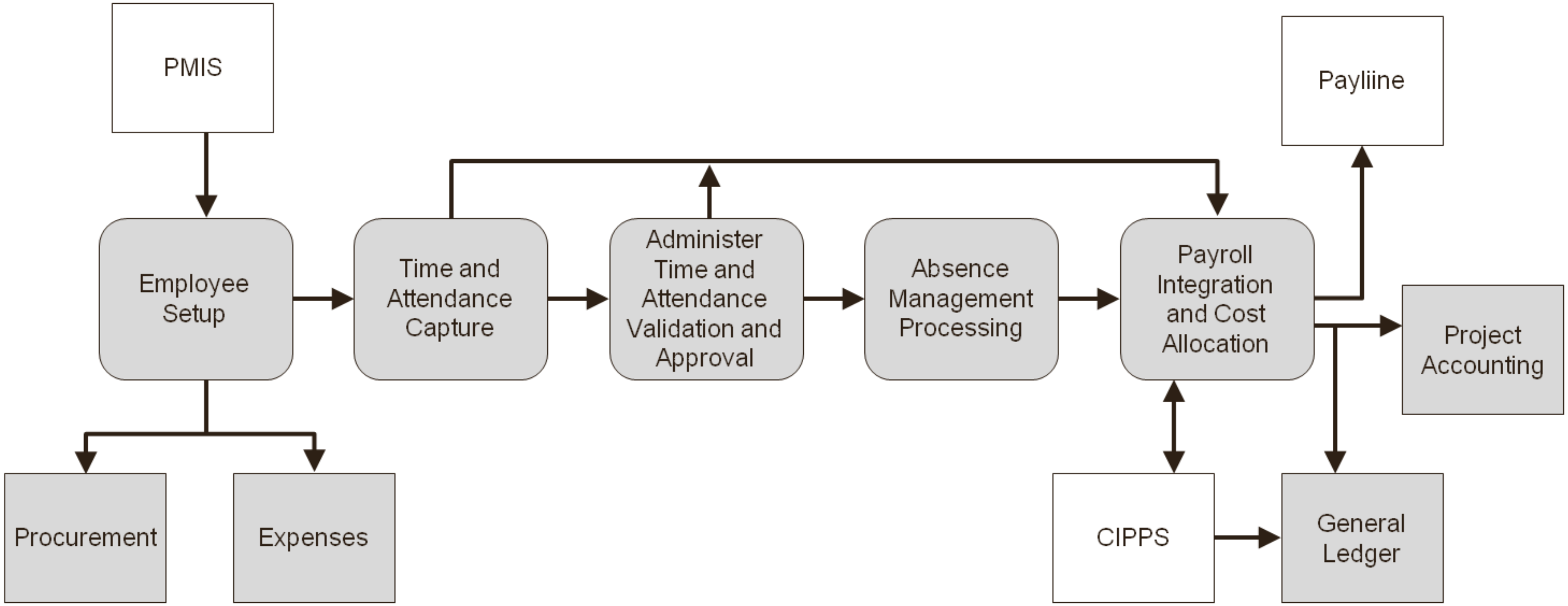
Project Accounting - Employee labor costs that are charged to projects are sent to Project Accounting when employee pay is distributed according to the charge distribution entered on employee timesheets.

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

Time & Attendance Process Interfaces

Time & Attendance also interfaces daily with several external systems:

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



Time & Attendance Process Interfaces (continued)

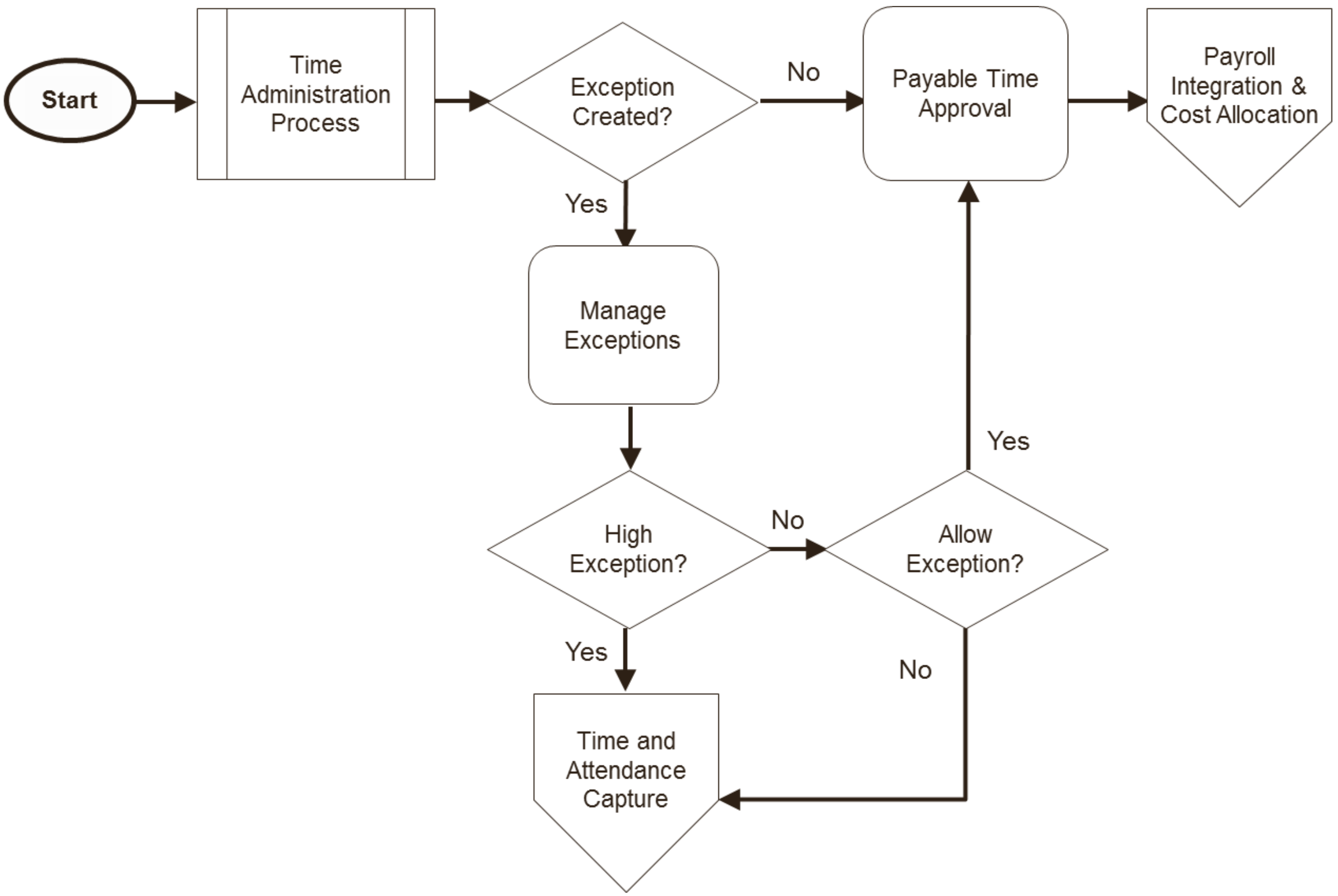
Personnel Management Information System (PMIS) – New and updated employee and position information is first entered into PMIS. PMIS then sends the information to Cardinal.

Commonwealth Integrated Payroll & Personnel System (CIPPS) - Timesheet entries for hourly employees and overtime entries for both hourly and salaried employees are sent to CIPPS to create employee pay. Timesheet entries also identify how employee regular and overtime pay is charged.

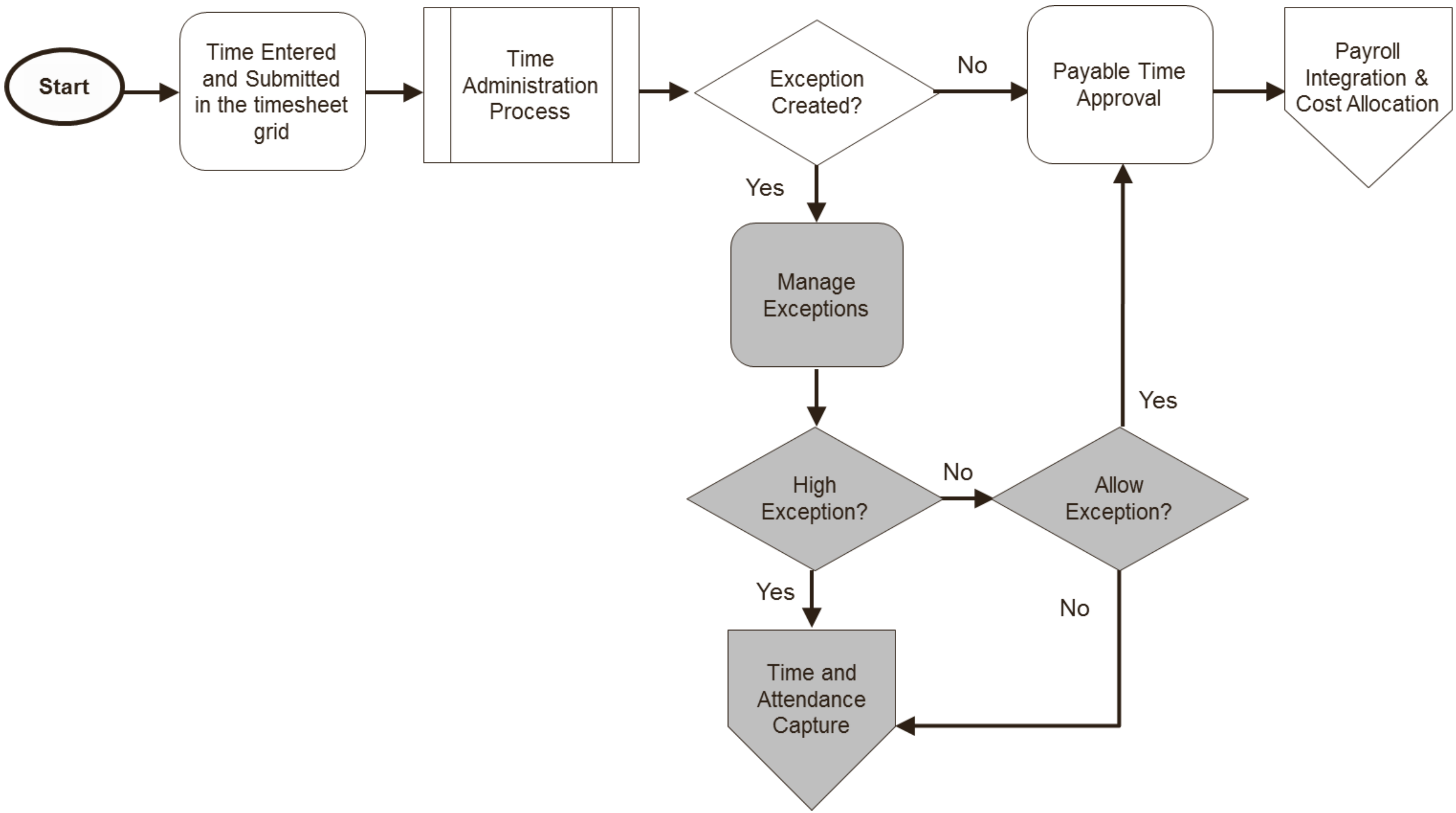
Payline – Absence information is sent periodically to the Department of Accounts to allow employees to view their absence balances via Payline.

Payable Time Approval Process Flow

The diagram on this page shows the Time & Attendance approval process for Payable Time.



Time Approval Process



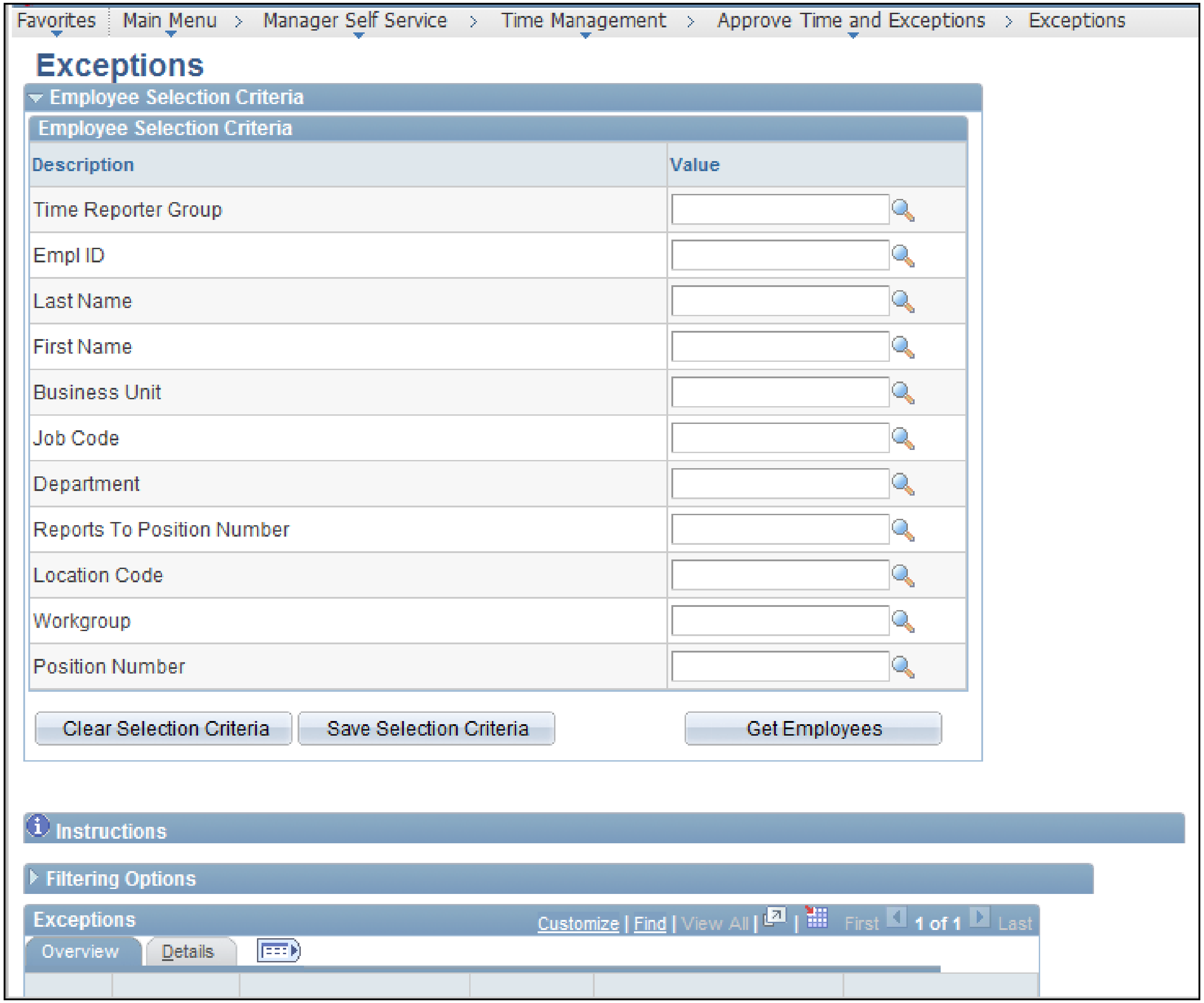
Click on image to return

Flow Chart Key

FLOW CHART KEY

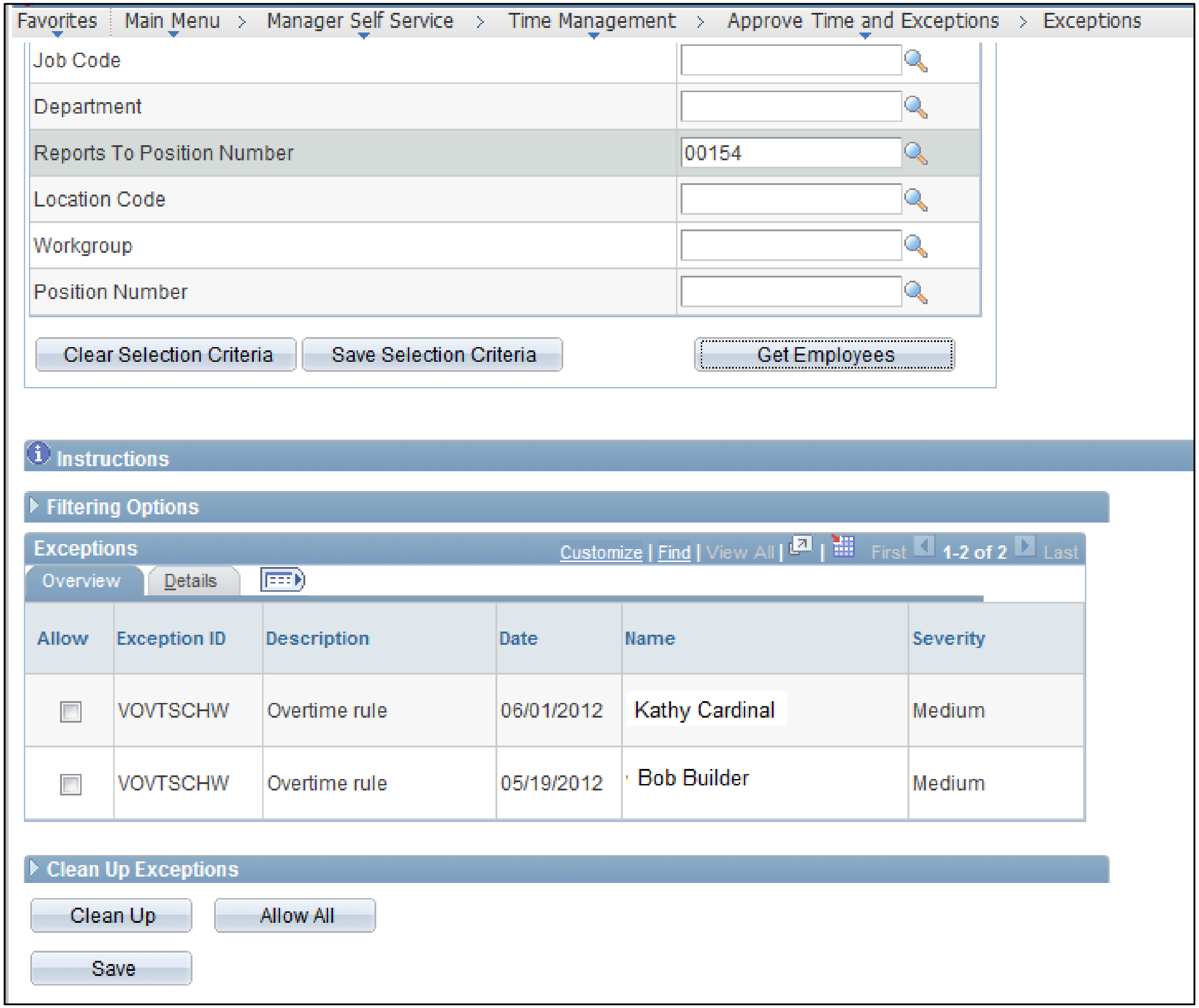
Symbol	Description
Step Description	Depicts a process step or interface.
Batch Process	Specifies a batch process.
Manual Operation	Depicts a process or step that is performed manually.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.
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.

Exceptions Search Page



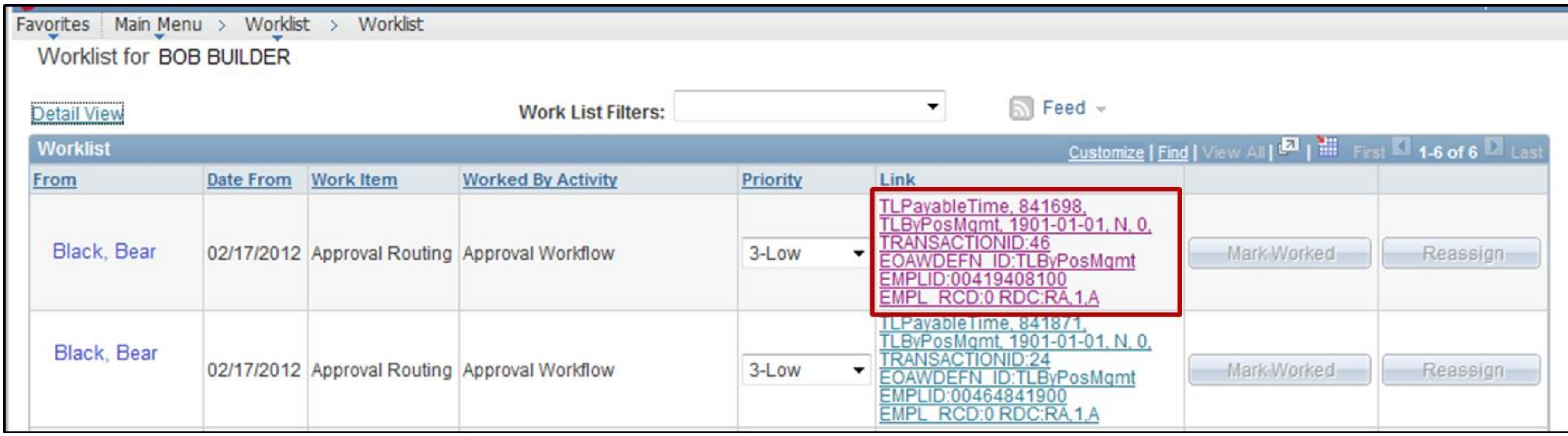
Click on image to return

Viewing Exceptions



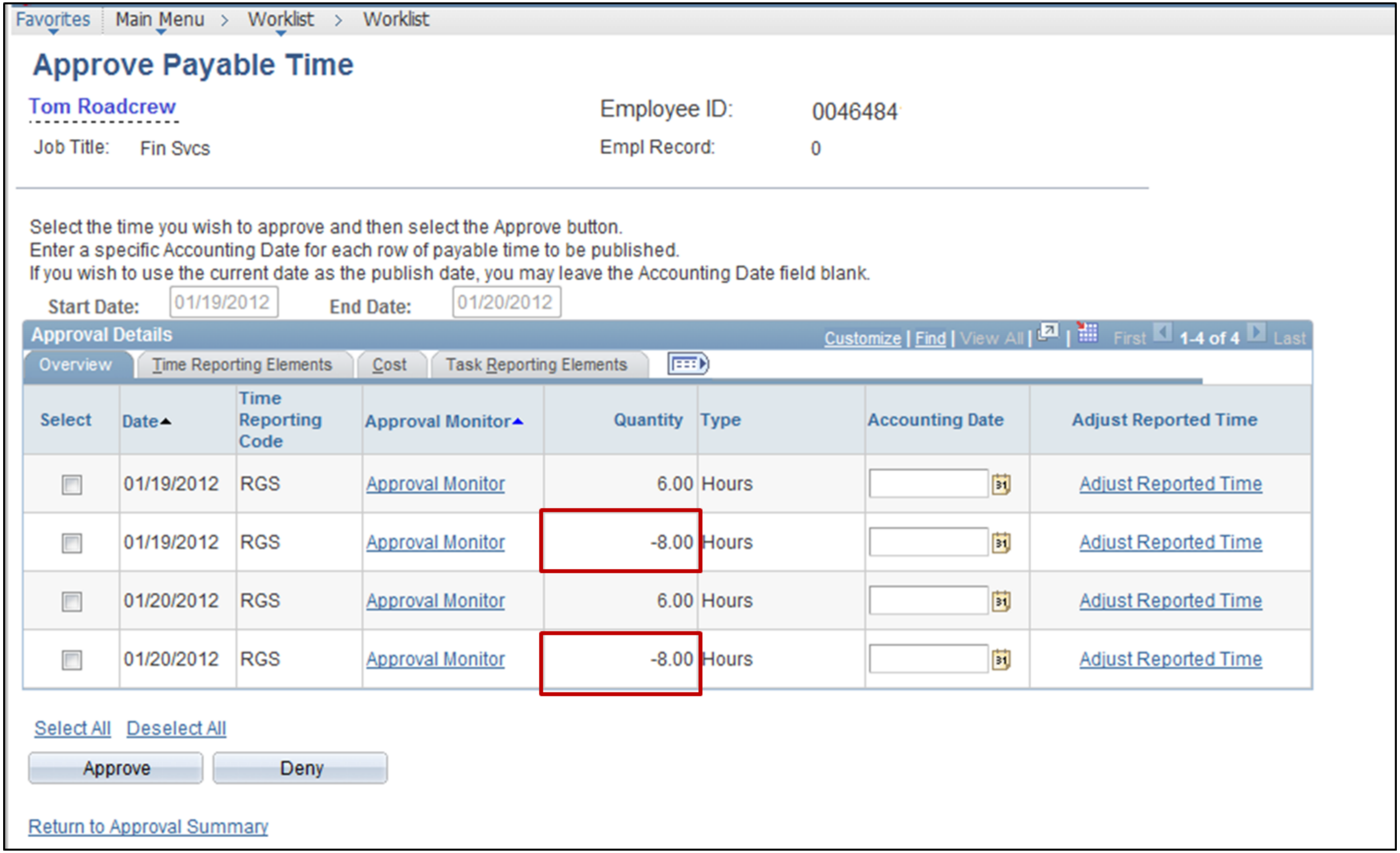
Click on image to return

Approving Payable Time – Worklist (continued)



Click on image to return

Approving Negative Hours (continued)



Favorites | Main Menu > Worklist > Worklist

Approve Payable Time

Tom Roadcrew

Employee ID: 0046484

Job Title: Fin Svcs

Empl Record: 0

Select the time you wish to approve and then select the Approve button.
Enter a specific Accounting Date for each row of payable time to be published.
If you wish to use the current date as the publish date, you may leave the Accounting Date field blank.

Start Date: 01/19/2012 End Date: 01/20/2012

Approval Details — Customize | Find | View All | First 1-4 of 4 Last

Overview | Time Reporting Elements | Cost | Task Reporting Elements

Select	Date	Time Reporting Code	Approval Monitor	Quantity	Type	Accounting Date	Adjust Reported Time
	01/19/2012	RGS	Approval Monitor	6.00	Hours		Adjust Reported Time
	01/19/2012	RGS	Approval Monitor	-8.00	Hours		Adjust Reported Time
	01/20/2012	RGS	Approval Monitor	6.00	Hours		Adjust Reported Time
	01/20/2012	RGS	Approval Monitor	-8.00	Hours		Adjust Reported Time

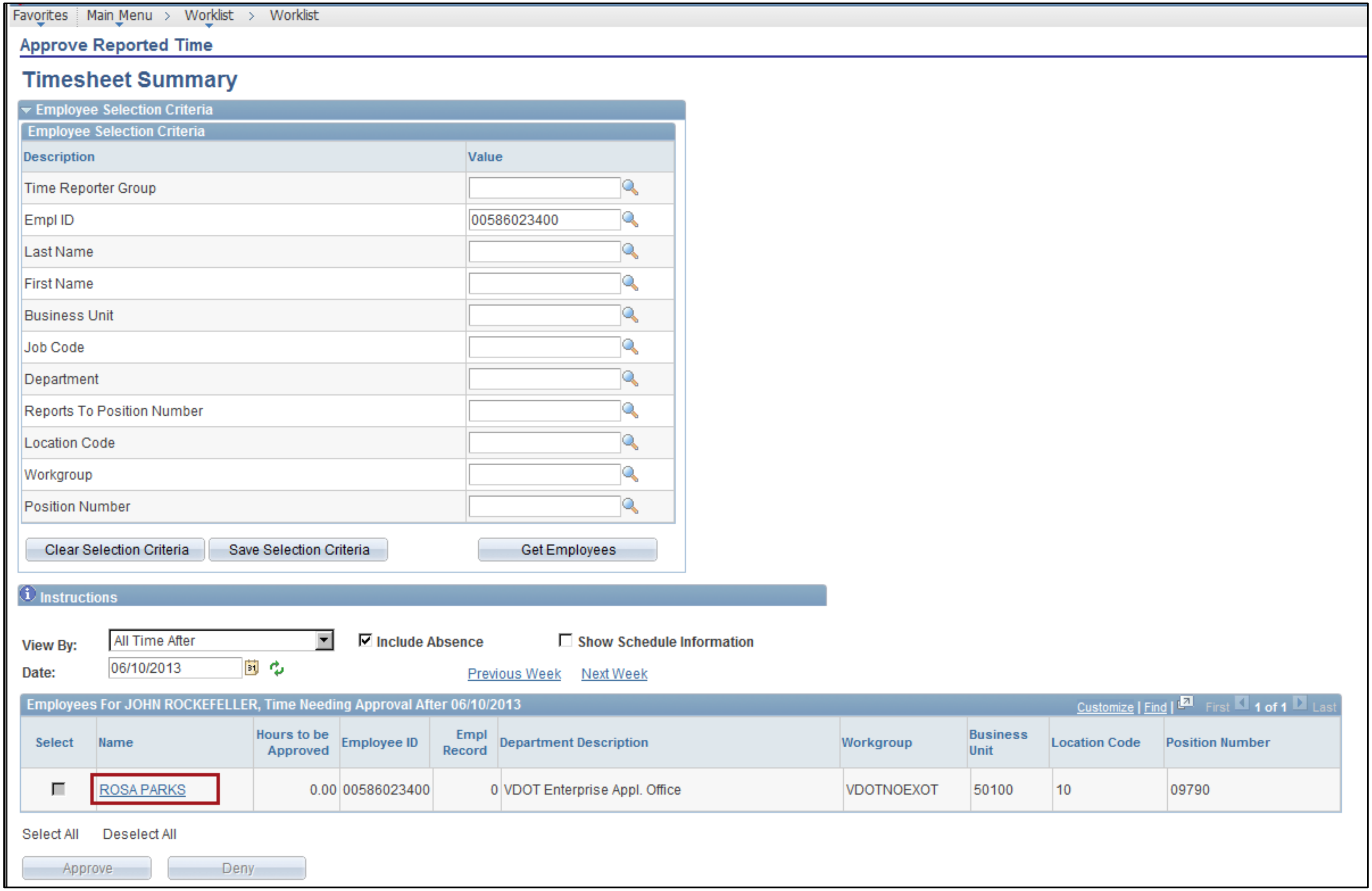
Select All Deselect All

Approve Deny

Return to Approval Summary

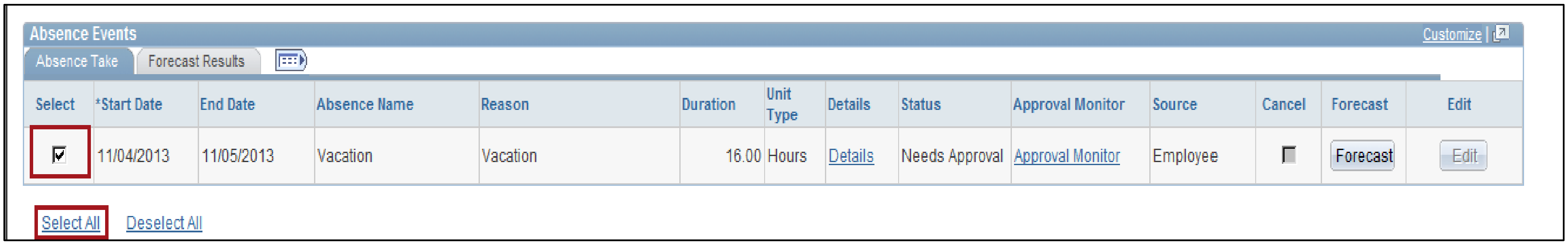
Click on image to return

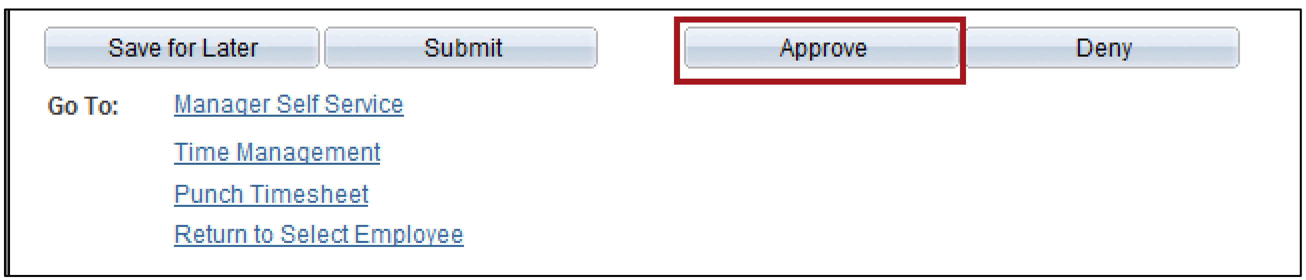
Select Name for Reported Time Approval



Click on image to return

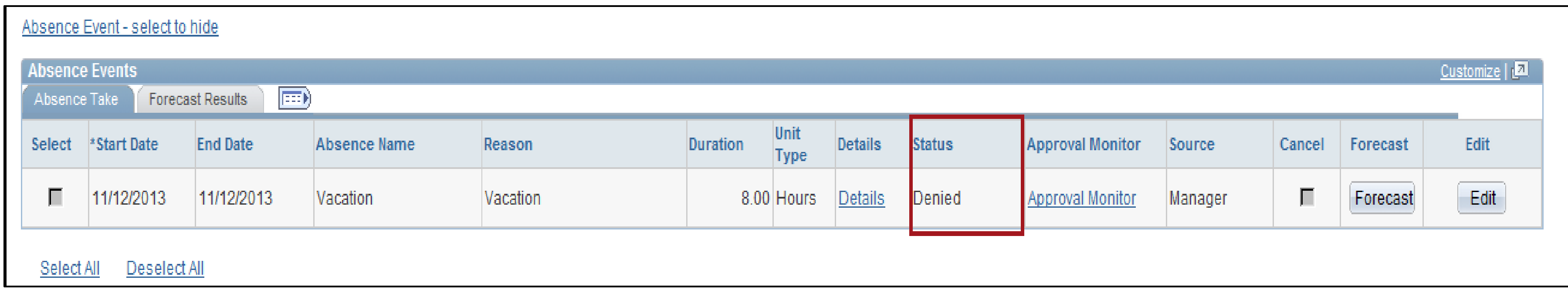
Approve Absence Request





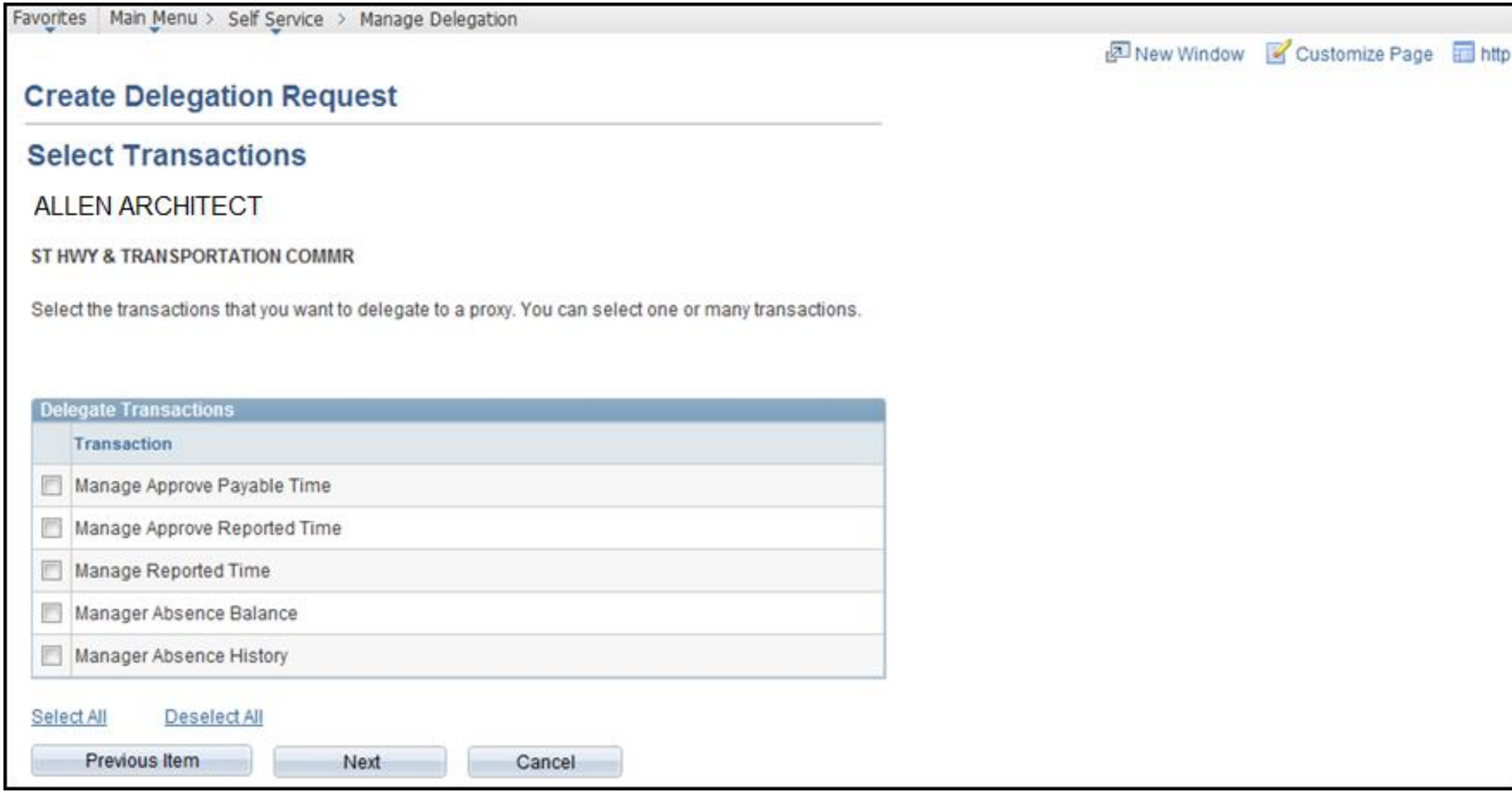
Click on image to return

Denied Absence



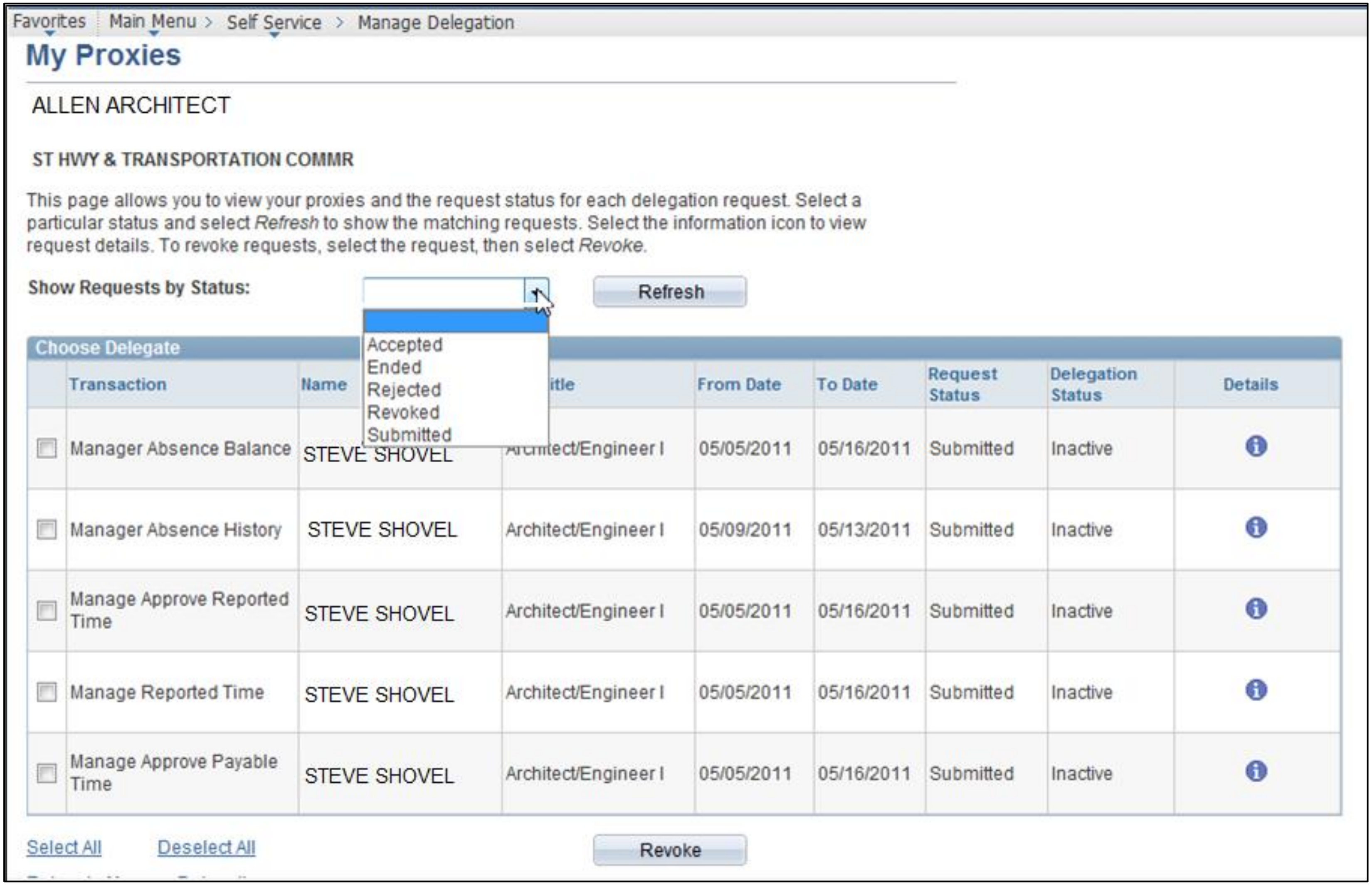
Click on image to return

Create Delegation Page



Click on image to return

My Proxies Page


Favorites | Main Menu > Self Service > Manage Delegation

My Proxies

ALLEN ARCHITECT

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This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select *Refresh* to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select *Revoke*.

Show Requests by Status: [ ] Refresh

- Accepted
- Ended
- Rejected
- Revoked
- Submitted

Choose Delegate

	Transaction	Name	Title	From Date	To Date	Request Status	Delegation Status	Details
☐	Manager Absence Balance	STEVE SHOVEL	Architect/Engineer I	05/05/2011	05/16/2011	Submitted	Inactive	ⓘ
☐	Manager Absence History	STEVE SHOVEL	Architect/Engineer I	05/09/2011	05/13/2011	Submitted	Inactive	ⓘ
☐	Manage Approve Reported Time	STEVE SHOVEL	Architect/Engineer I	05/05/2011	05/16/2011	Submitted	Inactive	ⓘ
☐	Manage Reported Time	STEVE SHOVEL	Architect/Engineer I	05/05/2011	05/16/2011	Submitted	Inactive	ⓘ
☐	Manage Approve Payable Time	STEVE SHOVEL	Architect/Engineer I	05/05/2011	05/16/2011	Submitted	Inactive	ⓘ

Select All   Deselect All   Revoke

Click on image to return