PeopleSoft Training Activity Sheet

Time & Labor Refresher Session

For use in training. Last updated December 2, 2015.

Introduction

The purpose of the Time & Labor Refresher Session is to practice entering time using the HCM Sandbox (SDHX) Database. The HCM Sandbox contains your district's information/data converted by the MITI Team for testing purposes only. The HCM Sandbox is a play environment for you to practice entering time for your district's employees. The time you enter in the HCM Sandbox for the Activities below will **NOT** get processed, in other words nothing will happen to this time; for example no paychecks will be produced for any employee. **The Refresher Session is NOT to be used for validating your district's information/data from the conversion.**

Activity 1 – Enter Time: Positive Time Employees

Directions: The employee(s) for this activity will be Hourly and/or Daily (e.g. Substitute Teacher). Use the **Timesheet** screen (Navigation: *Main Menu > Manager Self Service > Time Management > Report Time > Timesheet*) to search for and select a Positive Time employee (Employee ID) then enter time for the week(s) or calendar period of your choosing. The time will be approved in a later Activity.

Hourly Employees

1. Enter hourly time (HRLY) for several days.
2. Add a new row on the **Timesheet** screen and enter time for a Time Reporting Code (TRC) other than HRLY.
3. Repeat steps #1 and #2 for as many hourly employees as desired.

Hint: *If you are entering time by week you can click the Next Week link or Previous Week link on the* ***Timesheet*** *screen to navigate between weeks. For all of the above time entries select an appropriate Combination Code. There can only be 1 TRC code or 1 Combination Code per row on the Timesheet screen. You will need to add a row by clicking the plus sign (+) when you use a different TRC code or Combination Code.*

Daily Employees (Substitute Teachers)

1. Enter daily units worked (DAILY) for several days. Select a Combination Code reflecting where the substitute teacher worked.
2. Add a new row on the **Timesheet** screen and enter daily units worked at a different location, selecting a Combination Code to reflect that location.
3. Repeat steps #1 and #2 for as many daily employees (substitute teachers) as desired.

Hint: *If you are entering time by week you can click the Next Week link or Previous Week link on the* ***Timesheet*** *screen to navigate between weeks. For all of the above time entries select an appropriate Combination Code. There can only be 1 TRC code or 1 Combination Code per row on the Timesheet screen. You will need to add a row by clicking the plus sign (+) when you use a different TRC code or Combination Code.*

Activity 2 – Enter and Approve Time: Salary Employees

Directions: Use the **Timesheet** screen (Navigation: *Main Menu* > *Manager Self Service* > *Time Management* > *Report Time* > *Timesheet*) to search for and select a Salary employee (Employee ID) then enter and approve exception time for the week(s) or calendar period of your choosing.

1. Enter exception time, such as overtime, for one or more days.
2. Add a new row on the **Timesheet** screen and enter exception time for a Time Reporting Code (TRC) other than overtime.
3. Approve the Reported Time on the **Timesheet** screen. Make sure you click the **Reported Time Status** tab then under the *Approval* section click **Select All** followed by **Approve**.
4. Enter an absence, such as sick leave or vacation, for one or more full/partial days. Click the **Absence** tab on the **Timesheet** screen to enter absence events.
5. Approve the Absence on the **Timesheet** screen. Make sure you click the **Absence** tab then under the *Approval* section click **Select All** followed by **Approve**.
6. Repeat steps #1 through #5 for as many salary employees as desired.

Hint: *For Salary employees you only have to enter exception time, such as overtime, sick leave, vacation, etc., on the Timesheet screen, not their normal hours worked. There can only be 1 TRC code or 1 Combination Code per row on the Timesheet screen. You will need to add a row by clicking the plus sign (+) when you use a different TRC code or Combination Code. Remember you must click Forecast after entering an absence then click Submit to submit it. Do not enter exception time and an absence event then click Submit once, you must enter the exception time and click Submit then enter the absence and click Forecast followed by Submit.*

Activity 3 – Enter Time: Exception Hourly Employees

Directions: Use the **Timesheet** screen (Navigation: *Main Menu* > *Manager Self Service* > *Time Management* > *Report Time* > *Timesheet*) to search for and select an Exception Hourly employee (Employee ID) then enter and approve exception time for the week(s) or calendar period of your choosing.

Important: The Exception Hourly employee's fixed schedule normally gets invoked or loaded automatically onto the **Timesheet** screen after the last Off-Cycle run. No time has been loaded in the *Sandbox* for Exception Hourly employees. This means you will have to manually load the employee's fixed schedule using the *Apply Schedule* button. It also means the system will ***NOT*** automatically blank out the regular hours on the **Timesheet** screen when you add an absence event for a day that has regular hours. You must manually adjust the regular hours to reflect the actual hours worked and the absence hours.

1. Enter exception time, such as overtime, for one or more days.
2. Add a new row on the **Timesheet** screen and enter exception time for a Time Reporting Code (TRC) other than overtime.
3. Enter an absence, such as sick leave or vacation, for one or more full/partial days. Click the **Absence** tab on the **Timesheet** screen to enter absence events. Remember to adjust the regular hours to reflect the absence hours, if necessary.
4. Repeat steps #1 through #3 for as many exception hourly employees as desired.

Hint: *There can only be 1 TRC code or 1 Combination Code per row on the Timesheet screen. You will need to add a row by clicking the plus sign (+) when you use a different TRC code or Combination Code. Remember you must click Forecast after entering an absence then click Submit to submit it. Do not enter exception time and an absence event then click Submit once, you must enter the exception time and click Submit then enter the absence and click Forecast followed by Submit.*

All time and absence entries for Exception Hourly employees are automatically approved when entered.

Activity 4 – Update / Adjust Time All Employees

Directions: The purpose of this activity is to update or adjust time entries you made previously for Positive Time, Salary and Exception Hourly employees. Use the **Timesheet** screen (Navigation: *Main Menu > Manager Self Service > Time Management > Report Time > Timesheet*) to make these changes.

Positive Time Hourly Employees

Use hourly employees from Activity #1 for this activity.

1. Change the number of hours worked (HRLY) on one or more days. For example, if the employee worked 2.5 hours one day change it to 3.5 hours.
2. Pick one day with hourly time (HRLY) and give the employee an override rate for that day's hours only, not for any other day on the **Timesheet** screen row.
3. Repeat steps #1 and #2 for as many hourly employees as desired.

Hint: *When you enter an override rate on the Timesheet screen it will get applied to ALL time entries on the row. In order to apply an override rate to only 1 day in a row containing multiple time entries you must first enter zeros for that day on the original row, then add a new row, re-enter the hours, select a Time Reporting Code, enter the Override Rate and select a Combination Code.*

Positive Time Daily Employees (Substitute Teachers)

Use daily employees from Activity #1 for this activity.

1. Change the number of daily units worked (DAILY) on one or more days. For example, if the employee worked 1 unit change it to 0.5 units (half-day).
2. Pick one day with daily (DAILY) units worked and give the employee an override rate for that day's units only, not for any other day on the **Timesheet** screen row.
3. Pick one day with daily (DAILY) and change the location where the substitute teacher worked for that day only, not for any other day on the **Timesheet** screen row.
4. Repeat steps #1 through #3 for as many daily employees as desired.

Hint: *When you enter an override rate on the Timesheet screen it will get applied to ALL time entries on the row. In order to apply an override rate to only 1 day in a row containing multiple time entries you must first enter zeros for that day on the original row, then add a new row, re-enter the hours, select a Time Reporting Code, enter the Override Rate and select a Combination Code.*

When you change a combination code on the Timesheet screen it will get applied to ALL time entries on the row. In order to change a Combination Code to reflect a new work location for only 1 day in a row containing multiple daily entries you must first enter zeros for that day on the original row, then add a new row, re-enter the hours, select a Time Reporting Code and select a Combination Code.

Salary Employees

Use salary employees from Activity #2 for this activity.

1. Change the number of exception time hours worked on one or more days. For example, if the employee worked 1 hour of overtime one day change it to 1.5 hours.
2. Add a new row on the **Timesheet** screen and enter exception time for a Time Reporting Code (TRC) that is not currently used.
3. Approve the Reported Time on the **Timesheet** screen. Make sure you click the **Reported Time Status** tab then under the *Approval* section click **Select All** followed by **Approve**.
4. If you entered a partial day absence, change the number of hours. For example, if the employee had a partial sick day absence of 2 hours change the number of hours to 2.5. Click the **Absence** tab on the **Timesheet** screen to enter absence events.
5. Enter a new absence for one or more full/partial days. Click the **Absence** tab on the **Timesheet** screen to enter absence events.
6. Cancel one of the absence events you originally entered in Activity #2. Click the **Absence** tab on the **Timesheet** screen to cancel absence events.
7. Repeat steps #1 through #6 for as many salary employees as desired.

Hint: *For Salary employees you only have to enter exception time, such as overtime, sick leave, vacation, etc., on the Timesheet screen, not their normal hours worked. There can only be 1 TRC code or 1 Combination Code per row on the Timesheet screen. You will need to add a row by clicking the plus sign (+) when you use a different TRC code or Combination Code. Remember you must click Forecast after entering an absence then click Submit to submit it. Do not enter exception time and an absence event then click Submit once, you must enter the exception time and click Submit then enter the absence and click Forecast followed by Submit.*

To cancel an absence event click Edit button on the right-hand side of the row containing the absence then click the box under Cancel (this will put a checkmark inside the box) and click the Submit button (you do not have to click Forecast when cancelling an absence event).

Exception Hourly Employees

Use exception hourly employees from Activity #3 for this activity

1. Change the number of exception time hours worked on one or more days. For example, if the employee worked 1 hour of overtime one day change it to 1.5 hours.
2. Add a new row on the **Timesheet** screen and enter exception time for a Time Reporting Code (TRC) that is not currently used.
3. Change the number of regular hours worked (HRLE) on one or more days for an exception hourly employee.
4. If you entered a partial day absence, change the number of hours. For example, if the employee had a partial sick day absence of 2 hours change the number of hours to 2.5. Click the **Absence** tab on the **Timesheet** screen to enter absence events. Remember to adjust the regular hours to reflect the updated absence hours, if necessary.
5. Enter a new absence for one or more full/partial days. Click the **Absence** tab on the **Timesheet** screen to enter absence events. Remember to adjust the regular hours to reflect the updated absence hours, if necessary.
6. Cancel one of the absence events you originally entered in Activity #3. Click the **Absence** tab on the **Timesheet** screen to cancel absence events. Remember to adjust the regular hours to reflect the updated absence hours, if necessary.
7. Repeat steps #1 through #6 for as many exception hourly employees as desired.

Hint: *There can only be 1 TRC code or 1 Combination Code per row on the Timesheet screen. You will need to add a row by clicking the plus sign (+) when you use a different TRC code or Combination Code. Remember you must click Forecast after entering an absence then click Submit to submit it. Do not enter exception time and an absence event then click Submit once, you must enter the exception time and click Submit then enter the absence and click Forecast followed by Submit.*

To cancel an absence event click Edit button on the right-hand side of the row containing the absence then click the box under Cancel (this will put a checkmark inside the box) and click the Submit button (you do not have to click Forecast when cancelling an absence event).

All time and absence entries for Exception Hourly employees are automatically approved when entered.

Activity 5 – Reported Time Needing Approval

Directions: The purpose of this activity is to review queries listing time entries entered on the **Timesheet** screen that need to be approved.

1. Navigate to the **Query Viewer** screen (*Main Menu > Reporting Tools > Query > Query Viewer*).
2. Search for *M_TL* to get a list of all Time & Labor queries.
3. Run the queries listed below by clicking one of the options: *HTML*, *Excel* or *XML* (the *Excel* option will export the report to an MS Excel spreadsheet), which will open the query in a new, separate browser tab.
4. You can review the results online or download them by clicking one of the **Download results in** links.
5. Close the browser tab when finished viewing the query results.

Reported Time Needs Approval query (*M_TL_NEEDS_APPROVAL*).

Reported Time Audit query (*M_TL_REPORTED_TIME_AUDIT*). Select a **From Date** and **To Date** covering the dates used in the activities above then click **View Results**. The query may take several seconds to finish.

Activity 6 – Mass Approval of Reported Time

Directions: The purpose of this activity is to do a mass approval of time previously entered on the **Timesheet** screen for **Positive Time** employees.

1. Navigate to the **Approve Reported Time** screen (*Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Reported Time*).
2. In the *Change View* section change the **View By** option to *All Time Before* and the **Date** to first day of the next month after the dates used in the activities above. For example, if you entered time for December 2015 then set the **Date** to 1/1/2016. Click **Get Employees**.
3. You should now see a list of time entries for all Positive Time employees entered by the entire class. Please do **NOT** approve any time at this point. Each person in the class will approve the time for their own Positive Time employee in the steps below.
4. Refresh the **Approve Reported Time** screen by clicking *Reported Time* in the navigation breadcrumbs located at the top of the screen.
5. Search for one of the Positive Time employees (Employee ID) from Activity #1, then in the *Change View* section change the **View By** option to *All Time Before* and the **Date** to first day of the next month after the dates used in the activities above. For example, if you entered time for December 2015 then set the **Date** to 1/1/2016. Click **Get Employees**.
6. Under the *Approval* section click **Select All** followed by **Approve**.
7. Repeat steps #5 and #6 for as many positive time employees as desired.
8. Navigate to the **Timesheet** screen (Navigation: *Main Menu > Manager Self Service > Time Management > Report Time > Timesheet*) and search for and select a Positive Time employee (Employee ID) from Activity #1. Review the time entries for the dates used in the activities above, they should now have a **Reported Time Status** of *Approved*.

Hint: *The time for salary employees was approved after it was entered in the activities above. All time and absence entries for exception hourly employees are automatically approved when entered.*

Activity 7 – Additional Queries and Reports

Directions: When the report or query requires an employee id you can use any one of the **Positive Time**, **Salary**, or **Exception Hourly** employees from the activities above.

1. Navigate to the **Query Viewer** screen (*Main Menu > Reporting Tools > Query > Query Viewer*).
2. Search for *M_TL* to get a list of all Time & Labor queries.
3. **Payable Time Audit Query**, used to create an audit list of all Payable Time entries within a specified date range.
    a. Run the Payable Time Audit query (*M_TL_PAYABLE_TIME_AUDIT*) by clicking one of the options: *HTML*, *Excel* or *XML* (the *Excel* option will export the report to an MS Excel spreadsheet), which will open the query in a new, separate browser tab.
    b. Select a **From Date** and **To Date** covering the dates used in the activities above then click **View Results**. The query may take several seconds to finish. You can review the results online or download them by clicking one of the **Download results in** links.
    c. Close the browser tab when finished viewing the query results.
4. **Exceptions Report**, used to list any Payable Time entries having errors as detected by the Time Administration process.
    a. **Navigation:** Main Menu > Time and Labor > View Time > Exceptions
    b. In the **Time Reporter Group** field select **007ALL.**
    c. *Low* or *Medium* severity Exceptions do not block the creation of Payable Time or prevent the employee from getting paid. *High* severity Exceptions block the creation of Payable Time on that date until the Exception is resolved.
5. **Payable Time Summary Report**, used to list a summary of Payable Time information within a specified date range.
    a. **Navigation:** Main Menu > Manager Self Service > Time Management > View Time > Payable Time Summary
    b. Select one of the **Positive Time**, **Salary**, or **Exception Hourly** employees from the activities above and type it into the **Employee ID** box.
    c. Change the **Start Date** to a date used in the activities above then click **Get Employees**. The **End Date** defaults to 7 days after the **Start Date**.
    d. Click the employee's last name link to view the Payable Time Summary Report.
6. **Payable Time Detail Report**, used to list detailed Payable Time information within a specified date range.
    a. **Navigation:** Main Menu > Manager Self Service > Time Management > View Time > Payable Time Detail
    b. Select one of the **Positive Time**, **Salary**, or **Exception Hourly** employees from the activities above and type it into the **Employee ID** box**.**
    c. Click the employee's last name link to view the Payable Time Detail Report.
    d. Select a **Start Date** and **From Date** covering the dates used in the activities above then click the **Refresh** button.
7. **Payable Status Report**, used to provide a snapshot of all Payable Time entries (processed and unprocessed) within a specified date range.
    a. **Navigation:** Main Menu > Time and Labor > Reports > Payable Status

b. Add a new *TL_PAYABLE_STATUS_RPT* **Run Control ID**, then select the desired **Parameter** values and click **Run**. For example, select a **From Date** and **Through Date** covering the dates used in the activities above. Click the box beside *Estimated*, *Needs Approval*, *Approved*, *Sent to Payroll*, *Taken by Payroll*, and *Distributed* **Payable Status** options.

c. Click the **Process Monitor** link to view the report's progress. When the **Run Status** is equal to *Success* and the **Distribution Status** is equal to *Posted*, click the **Go back to Payable Status** link.

d. Click the **Report Manager** link then the **Administration** tab. Click the **Payable Status Report** link to view the report.

e. When finished, click the **Go back to Payable Status** link.

8. **Reported Time Audit**, used to provide an audit trail for all adds, updates and deletes to the employee's Reported Time (Timesheet screen entries) within a specified date range.

   a. **Navigation:** Main Menu > Time and Labor > Reports > Reported Time Audit

   b. Add a new *TL_REPORTED_TIME_AUDIT_RPT* **Run Control ID**, then select the desired **Parameter** values and click **Run**. For example, select a **From Date** and **To Date** covering the dates used in the activities above. Select one of the **Positive Time**, **Salary**, or **Exception Hourly** employees from the activities above and type it into the **Empl ID** box, then select an **Empl Record** using the lookup tool. Select the *Include* option for **Include or Exclude**. Click **Run** to run the report.

   c. Click the **Process Monitor** link to view the report's progress. When the **Run Status** is equal to *Success* and the **Distribution Status** is equal to *Posted*, click the **Go back to Time Audit Report** link.

   d. Click the **Report Manager** link then the **Administration** tab. Click the **TL_AUDIT_RPT** link to view the report.

   e. When finished, click the **Go back to Time Audit Report** link.

9. **Combination Code Account List Query**, used to get a list of your district's Combination Codes or *chartstrings*/account numbers.

   a. **Navigation:** Main Menu > Reporting Tools > Query > Query Viewer

   b. Search for the **Combination Code Account List** query (*M_KK_COMBO_ACCTS_LIST*), or search for *M_KK*.

   c. Run the query by clicking one of the options: *HTML*, *Excel* or *XML* (the *Excel* option will export the report to an MS Excel spreadsheet), which will open the query in a new, separate browser tab.

   d. Click the lookup tool beside **Set ID** and select *00700 Cardiff* then click **View Results**. The query may take several seconds to finish. You can review the results online or download them by clicking one of the **Download results in** links.

   e. Close the browser tab when finished viewing the query results.