Time and Labor (OTL)

Create and Use Timecard Attachments - Super and Limited Timekeepers

DODEA R12 Work Instructions

Document Control

Change Record

Date	Author	Version	Change Reference
16-Oct-2014	Robin Hardy	1.0	R12 Upgrade

Reviewers

Date	Name	Position
20-Oct-2014	Bill Mohamed	Work Force Preparation, Lead

Distribution

Copy No.	Name	Location
1	DODEA_R12_WI_OTL_AMS_Create and Use Timecard Attachments_Timekeepers	DAI DEPS

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Business Process Description

This process is used by the Timekeeper to attach documentation to an employee's timecard such as leave request, premium pay request, a paper timesheet, or any other document that requires supervisor review.

Trigger

A user has created a timecard and the timekeeper needs to attach time-related documentation so that the supervisor may review for approval.

Prerequisites

- The employee's HR record exists in DAI and is linked to the employee's user account.
- The employee must have an "Active" assignment record.
- The employee's status must be Full-Time, Part-Time or Intermittent.
- The employee must have a valid Tour of Duty for the current period.
- The Supervisor's HR record is set up in DAI, and is linked to the Supervisor's user account.
- The Supervisor's name is populated in the Supervisor field on the employee's record.
- The Timekeeper is set up in DAI.
- The timecard has been created and is in "Working", "Submitted", "Approved", "Rejected", or "Error" status.

Responsibilities

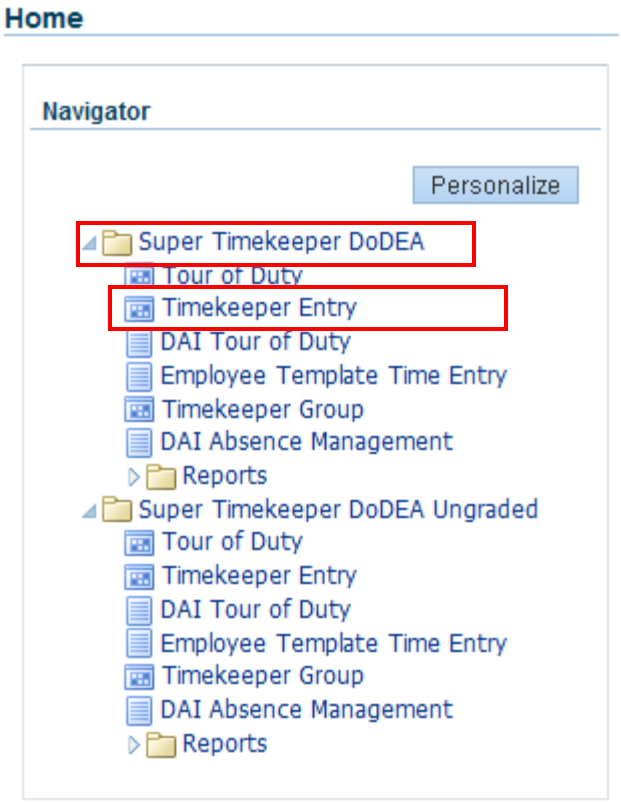
- Super Timekeeper – DODEA
- Limited Timekeeper – DODEA

Menu Path

Use the following menu path(s) to begin this task.

- Timekeeper Entry

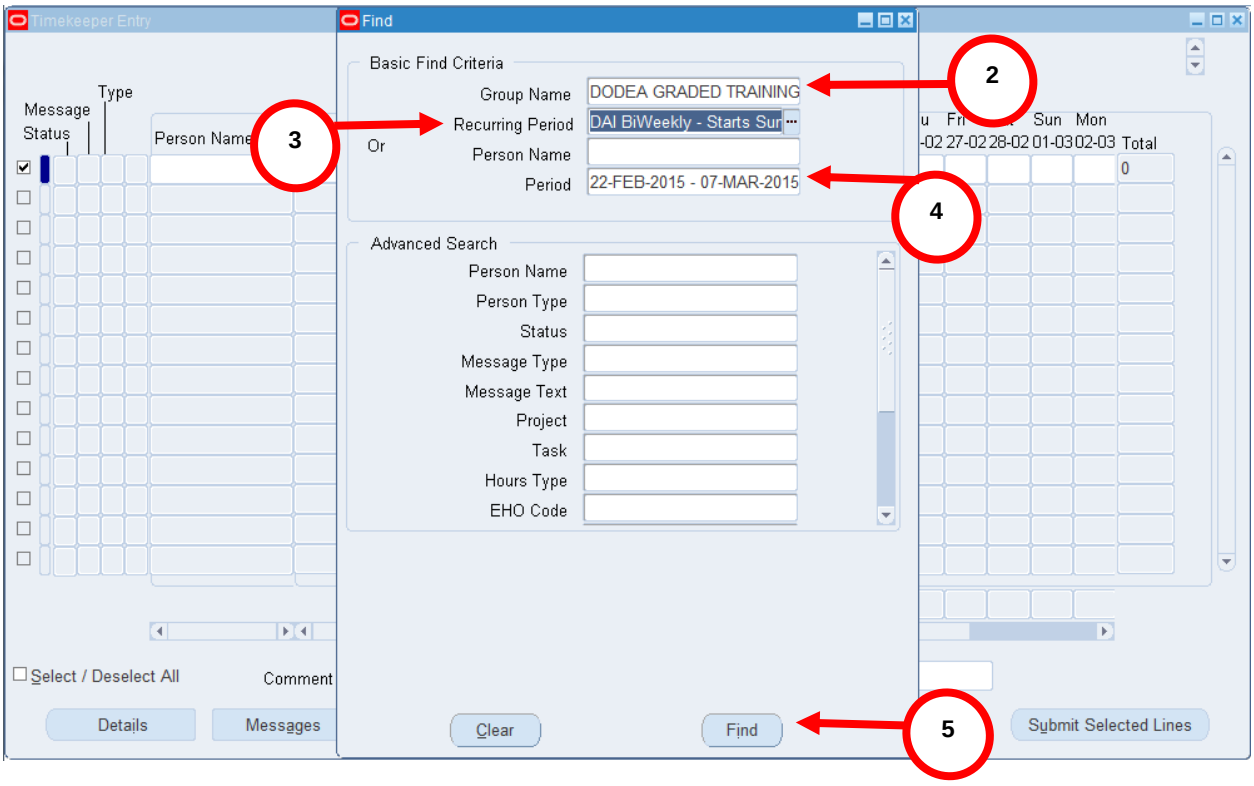
Create Timecard Attachments	
1.	Start the task using the responsibility and menu path to open the **Timecard** form: **Responsibility:** Limited Timekeeper – DODEA OR Limited Timekeeper – DODEA – Ungraded Super Timekeeper – DODEA OR Super Timekeeper – DODEA – Ungraded **Menu Path:** Timekeeper Entry



Note: The Timekeeper responsibilities are separated by Graded (blank after DODEA) or Ungraded as shown.

The Timekeeper Groups must be separated by Employee Active Status of Graded or Ungraded, as the time entry layouts will default to only one format. Graded Group layouts will display specific codes only applicable to Graded employees. Ungraded Groups layouts will only display the specific codes applicable to Ungraded employees.

Timekeeper Entry – Find form



The **Timekeeper Entry** form provides two different search options:

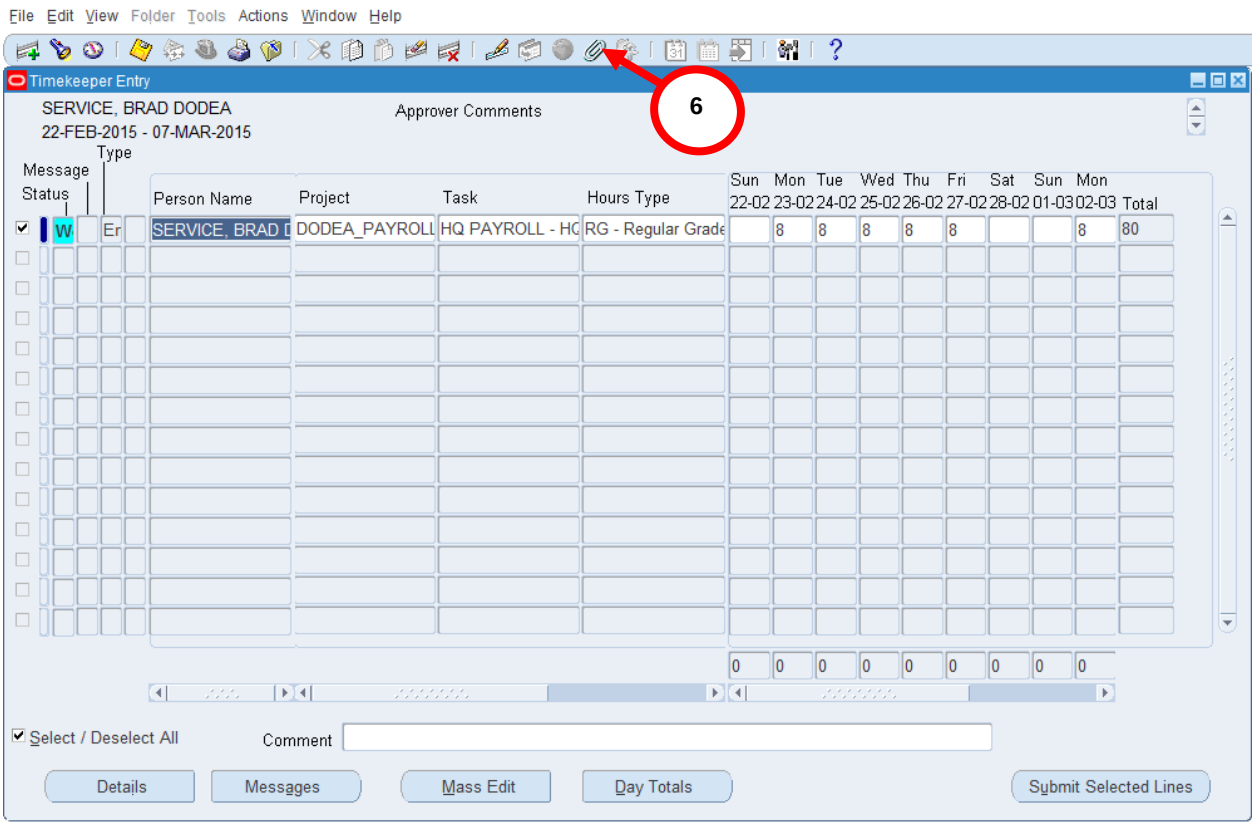
- **Basic Find Criteria**
- **Advanced Search**

To demonstrate attachments, we will use the default **Graded Group** displayed in the **Basic Find Criteria**.

Refer to the ***Enter Time as Timekeeper*** Work Instruction for more information regarding how to search for specific timecards.

2.	**Group Name** - Select a Timekeeper Group name or use the default Timekeeper Group.
3.	**Recurring Period –** The default value, "**DAI Bi-Weekly – Starts Sunday**" is standard for most agencies, indicating timecards are submitted every two weeks and each pay period starts on a Sunday.
4.	**Period –** The default value is the current **Payroll Period.**
5.	Click the **Find** button to populate the **Timekeeper Entry** form with employee timecards that match the selected criteria.

Timekeeper Entry: Attachment

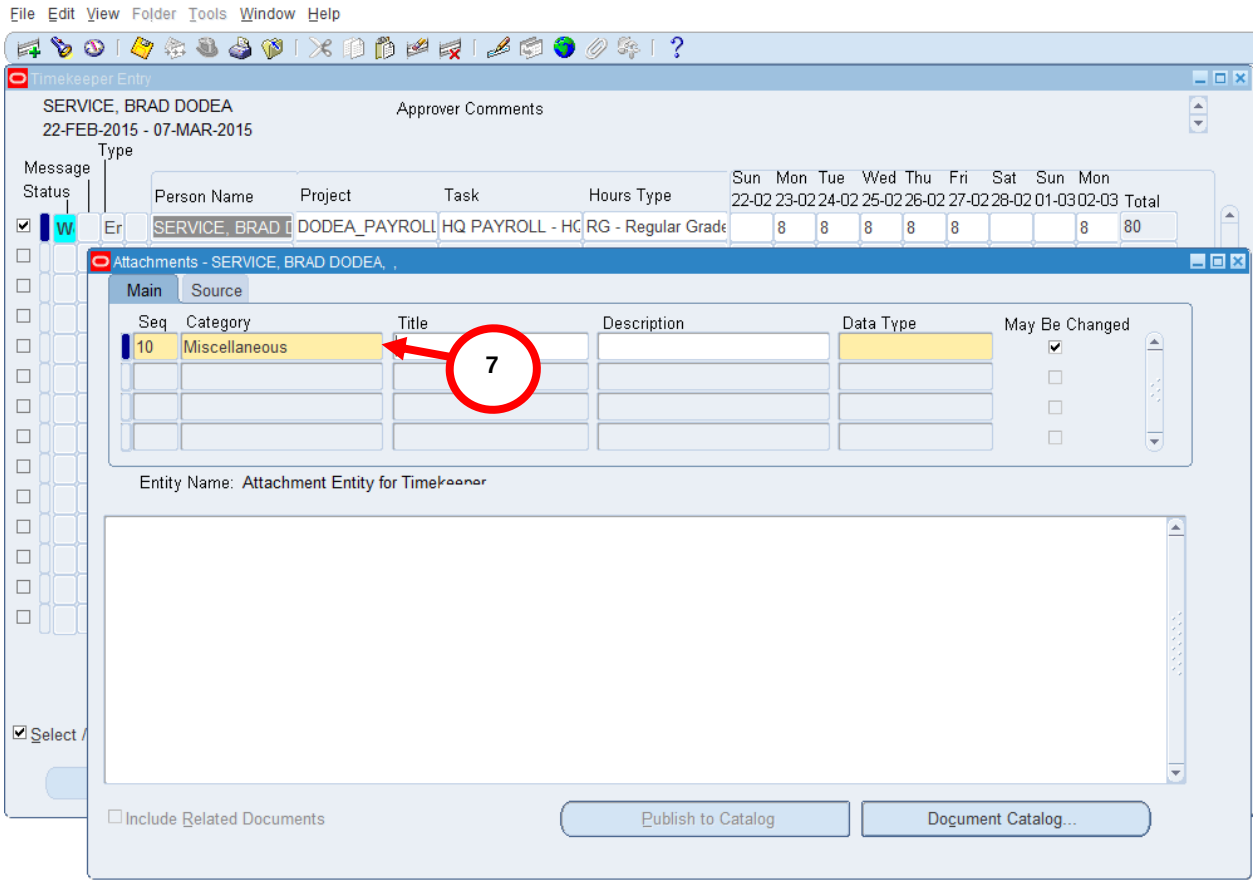


6. Click the **Attachments…** (Paperclip) icon to add an attachment to the selected timecard.

Note: Initial entry of the timecard will require the **Timekeeper** to **Save** and re-query (using the **Flashlight** icon or keyboard shortcut **CTRL + F11**) the timecard on the **Timekeeper Entry** form in order to activate the **Attachment…** (Paperclip) icon.

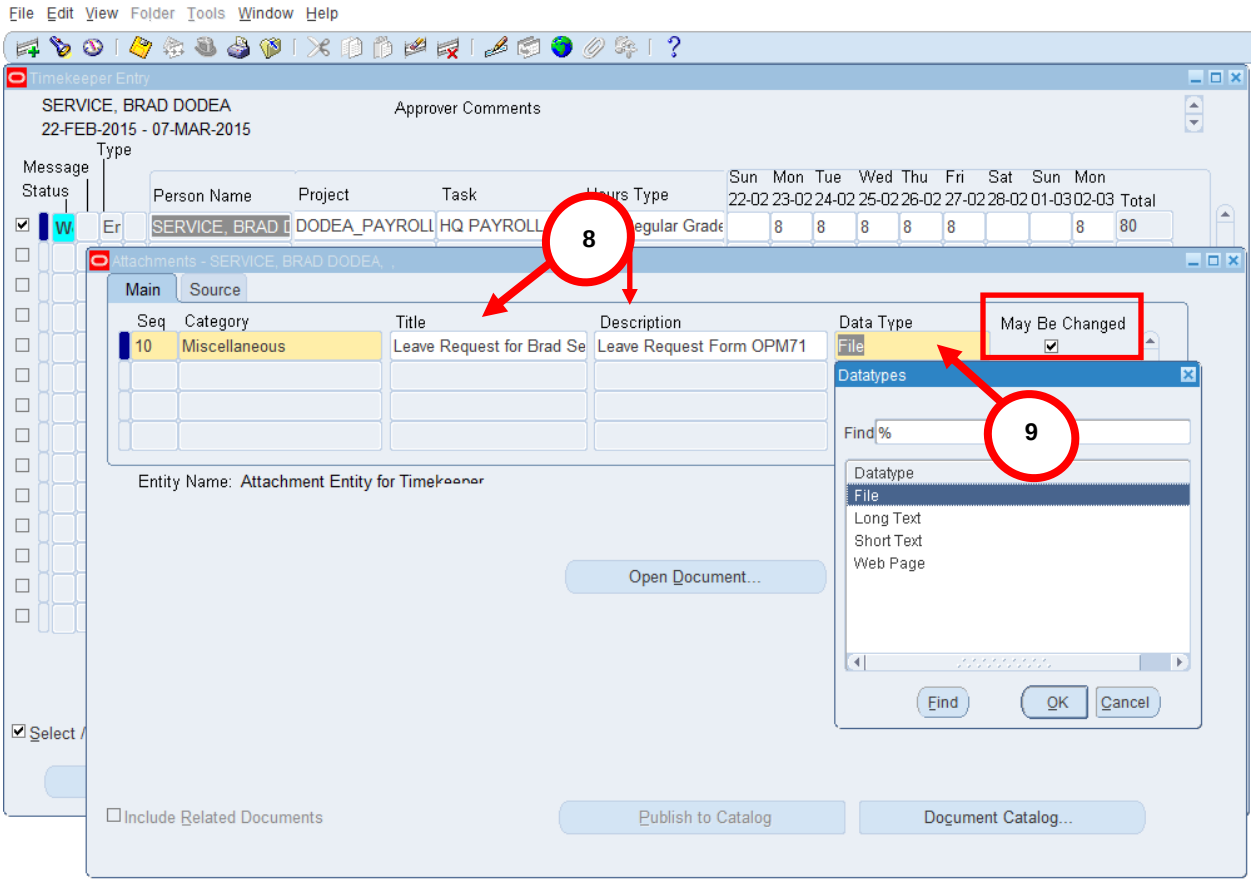
If the timecard was previously entered and in a status of **Approved, Error, Submitted or Working**, the **Attachments…** (Paperclip) icon will already be in an active status without saving or re-querying the **Timekeeper Entry** form.

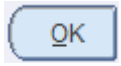
Attachments



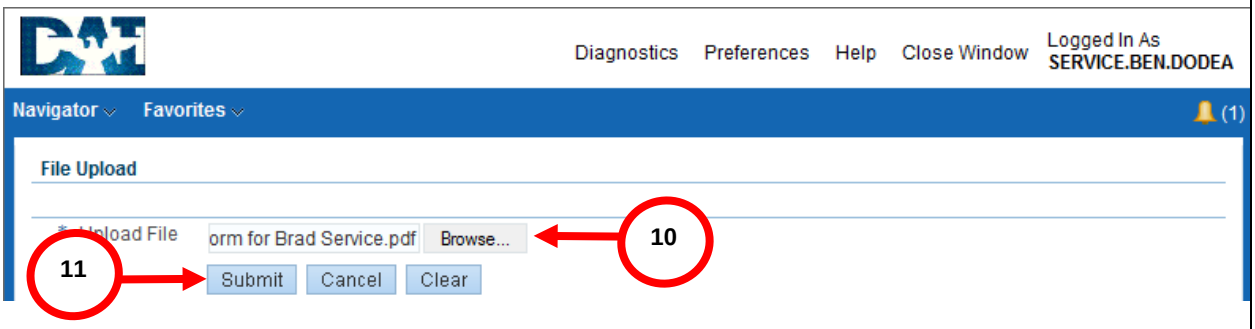
7.	Click on the **Category** List of Values (**LOV)** to auto-populate the **Categories** with the **Miscellaneous** selection (only one selection).

Attachments



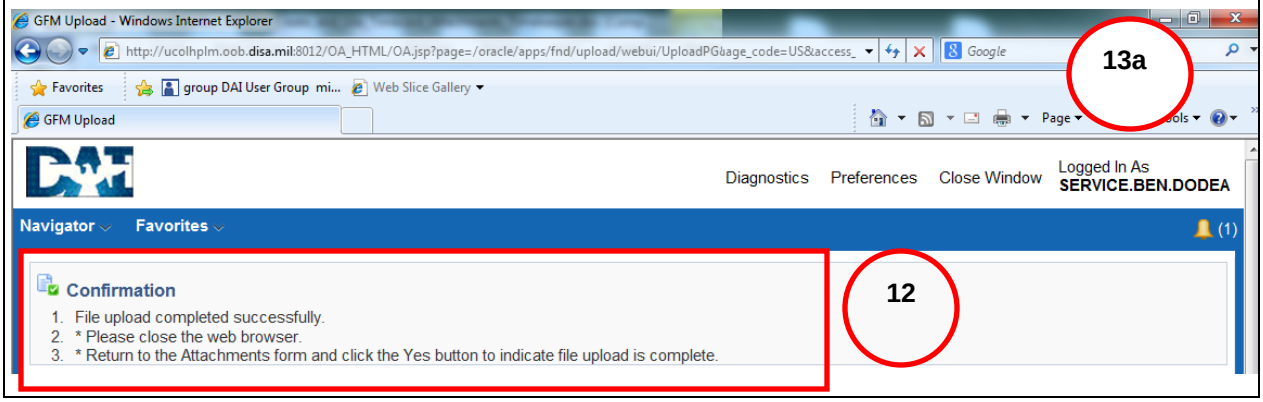
8.	Enter a title and/or description in the **Title** and **Description** fields. **(Optional)**
9.	Click the **Data Type LOV** and select the appropriate data type in the **Datatype** listing, then click the **OK**  button. ➢ To add a **File**, proceed to step 10. ➢ To add **Long Text**, proceed to step 14.(>2000 characters) ➢ To add **Short Text**, proceed to step 14.(≤2000 characters) ➢ To add a **Web Page**, proceed to step 17. **Note*:*** All **Datatypes** “**File, Short Text, Long Text and URL’s”** can be attached and then viewed in the approval notification window with each timecard. The **May Be Changed** checkbox defaults and may not be changed.

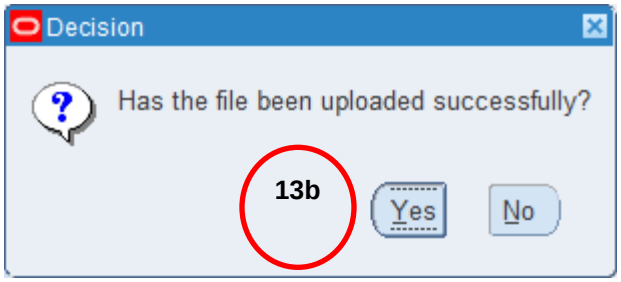
Attachments: File Upload



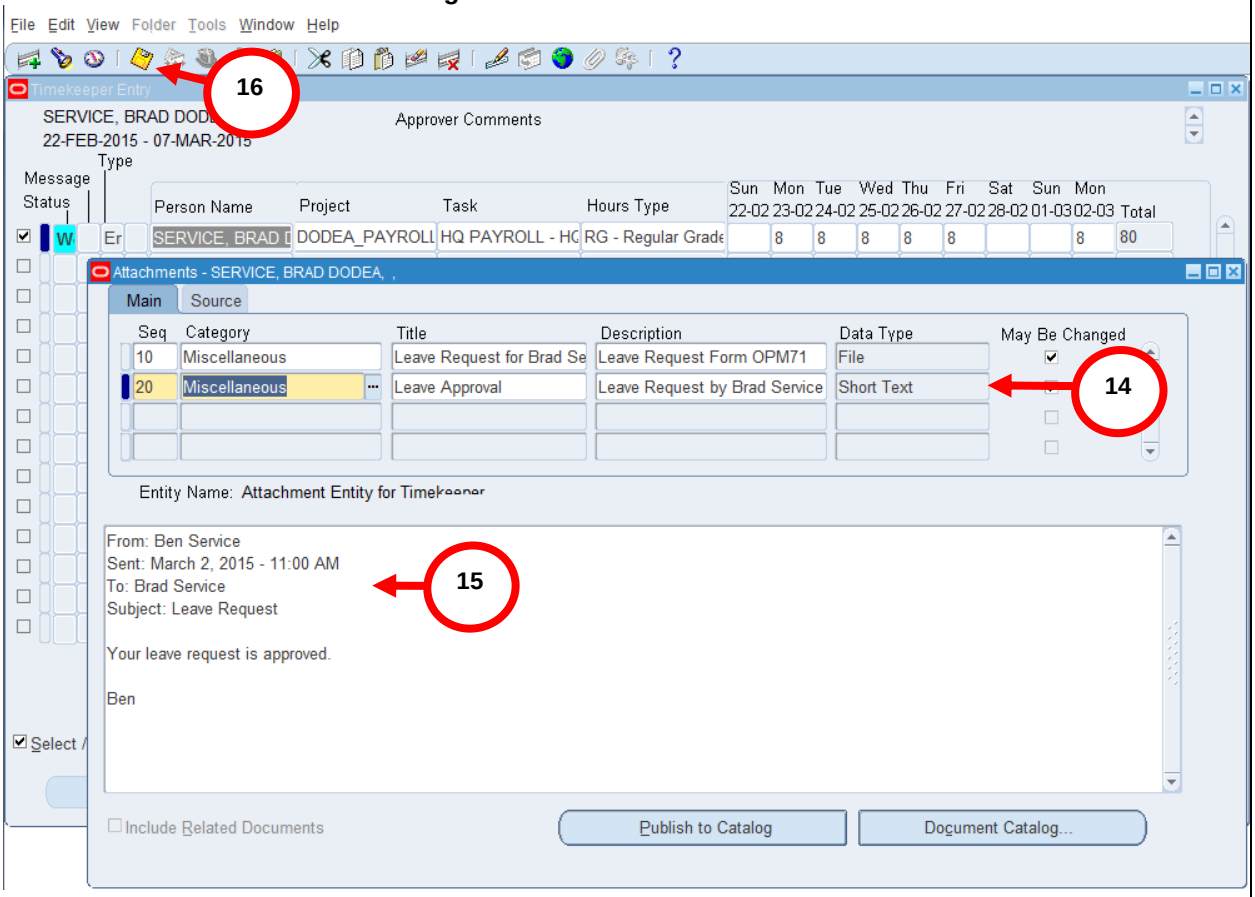
10.	Click the Browse... button to select and attach a file from the desired location in the **Upload File** field.
11.	Click the Submit button to attach the selected document to the timecard.

Attachments: Confirmation



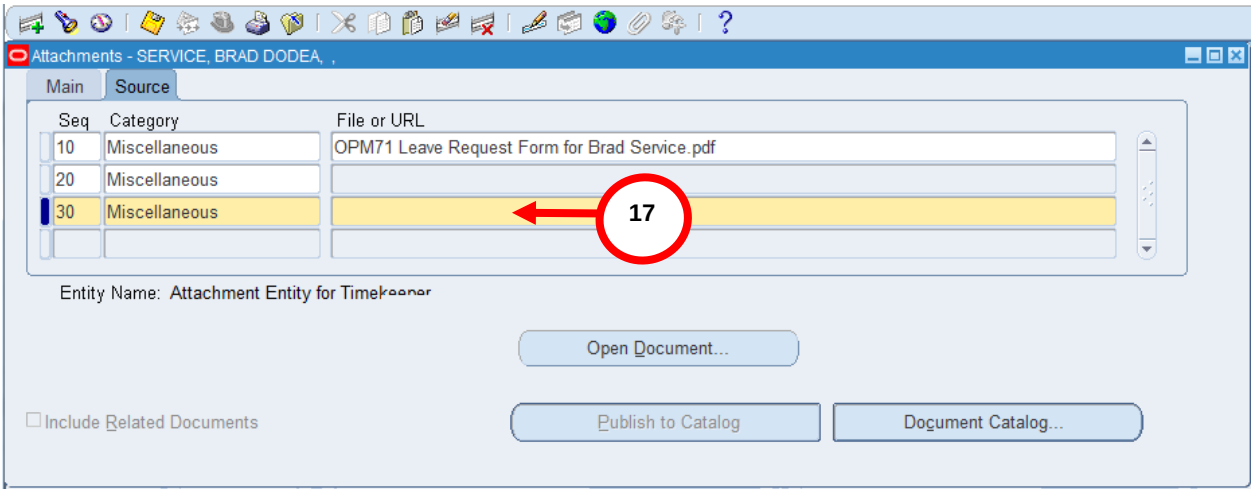
12.	A confirmation page will be displayed, stating the file has been successfully uploaded.
13.	As instructed by the **Confirmation** statement: a) "Please close the web browser": - Click the **Close Window** link or icon in the right corner of the **Confirmation** page. b) The **Attachment** form will be displayed. Click the **Yes** button on the **Decision** box to indicate the file upload is complete. 

Attachments: Add Short Text / Long Text



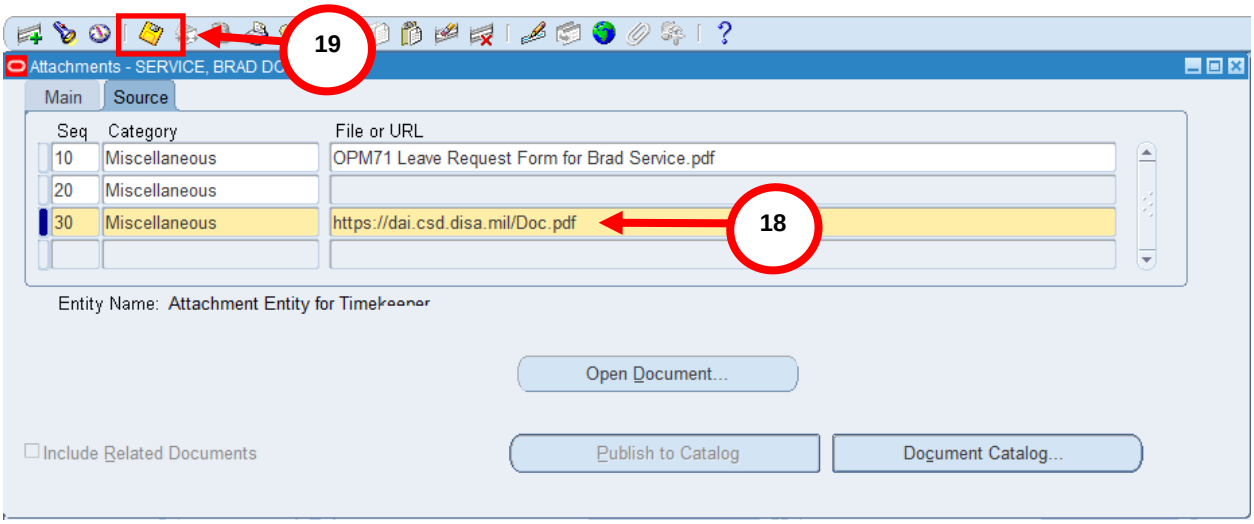
14.	Click the **Data Type LOV** and select **Short Text** or **Long Text**, depending on the length of the text to be added. **Short Text** – Stores 2000 characters or less. **Long Text** – Stores more than 2000 characters.
15.	Type or paste text into the text area.
16.	Click the icon at the top of the screen to save the entered **Short or Long Text**. .

Attachments: Add Web Page



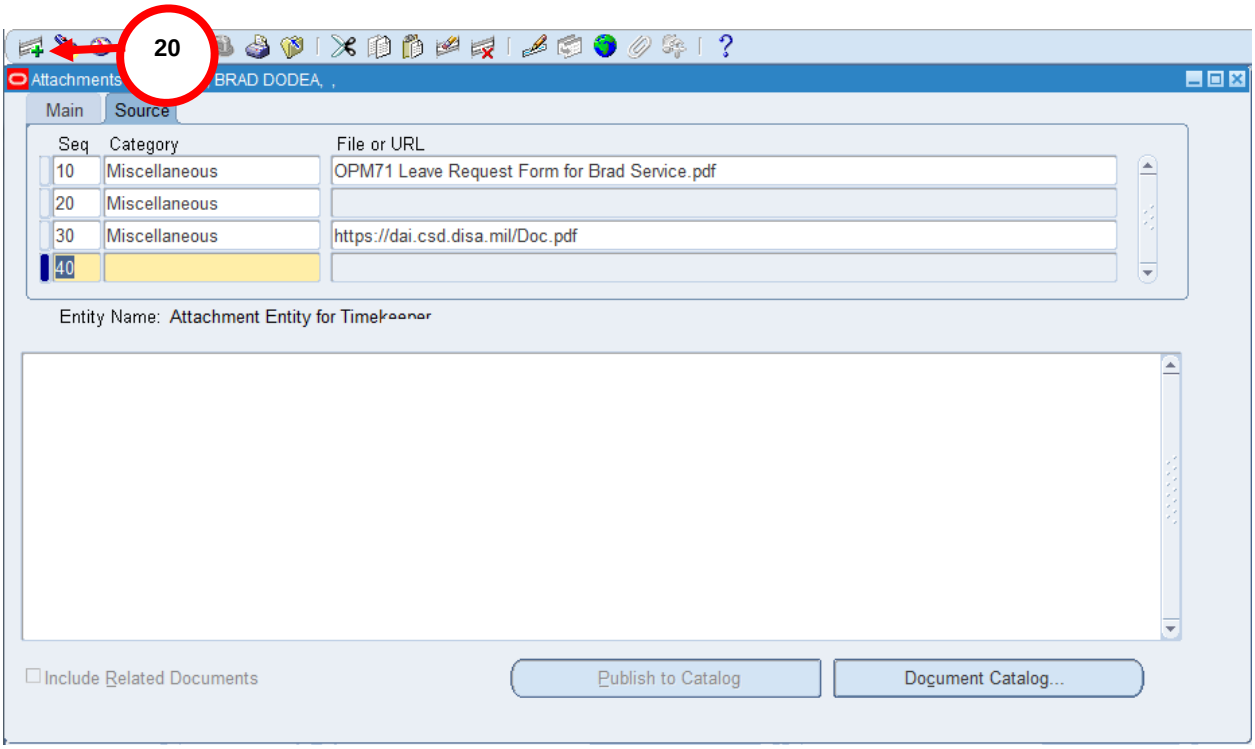
17.	Click the **Data Type LOV** and select **Web Page** to add a web page **Uniform Resource Locator (URL)** link to the timecard.

Attachments: Add Web Page



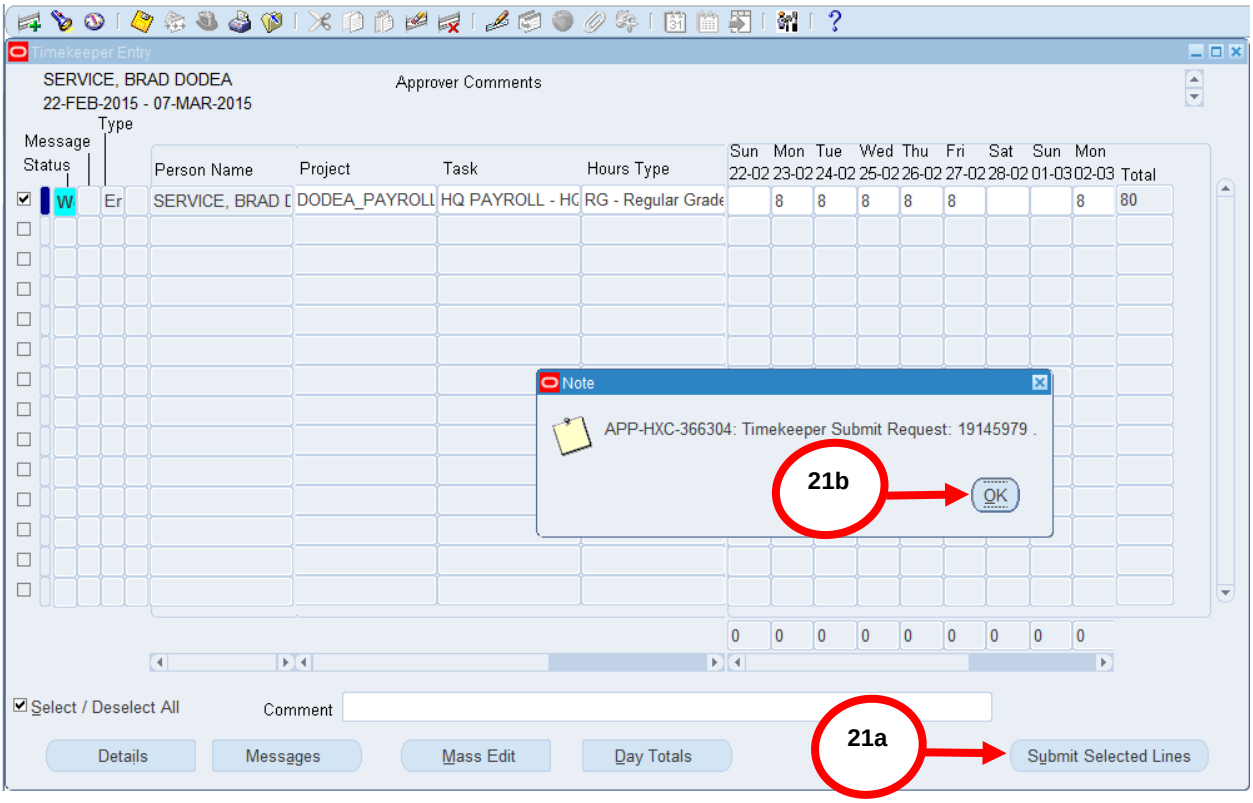
18.	Enter a valid **URL** in the **File or URL** field.
19.	Click the **Save** icon in the toolbar at the top of the screen.

Attachments: Add Additional Attachments



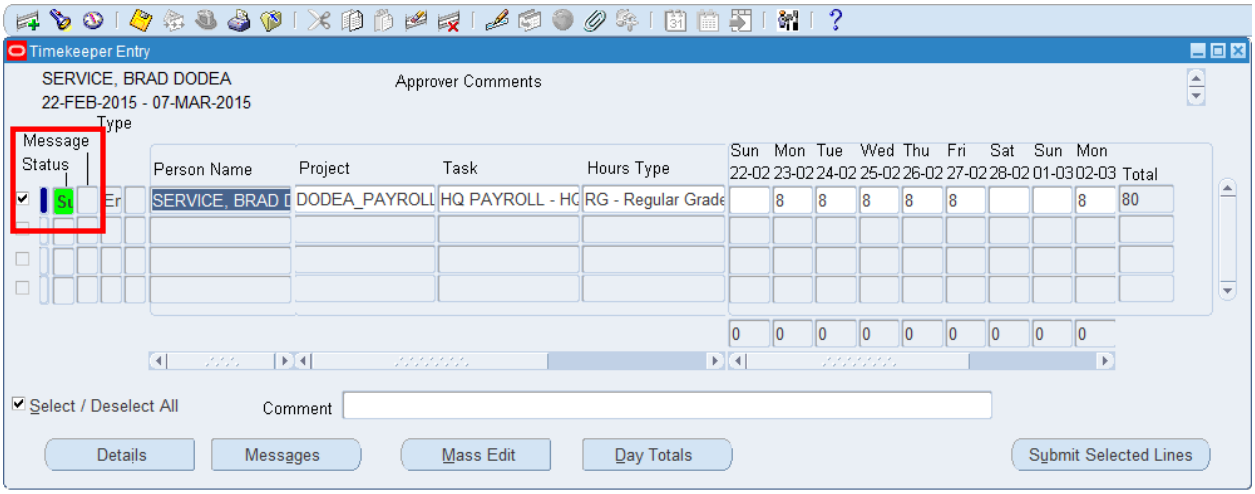
20.	Click the **New** icon on the top menu bar to add another row in the **Attachments** form. Return to step 7 in this section to add additional documents.

Timecard Submission



21.	**a)**	Click the **Submit Selected Lines** button to submit the timecard. A **Note** dialog box will be displayed, indicating the timecard has been submitted.
	b)	Click the **OK** button to confirm.

Timecard Submission

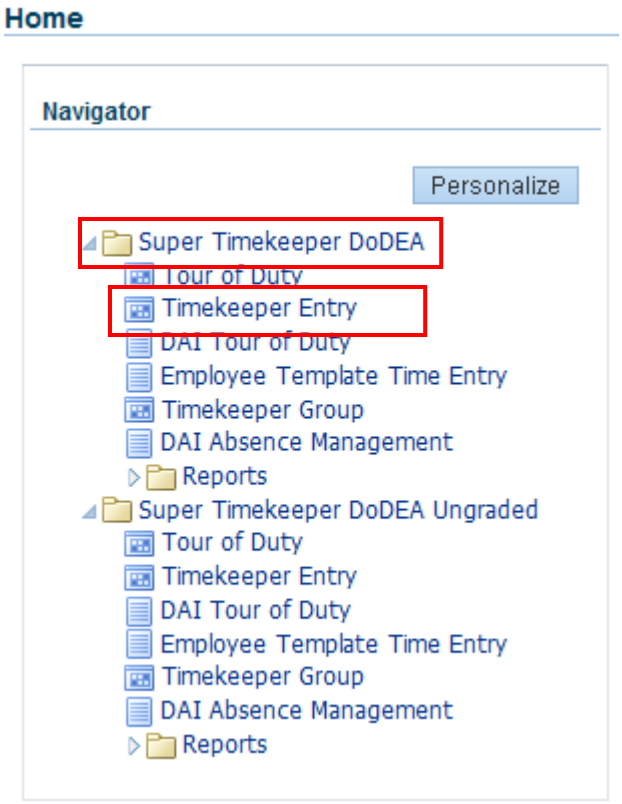


22.	Re-query the timecard in the **Timekeeper Entry** form by pressing **CTRL + F11**. Confirm the status has changed to **Submitted**. (Green)

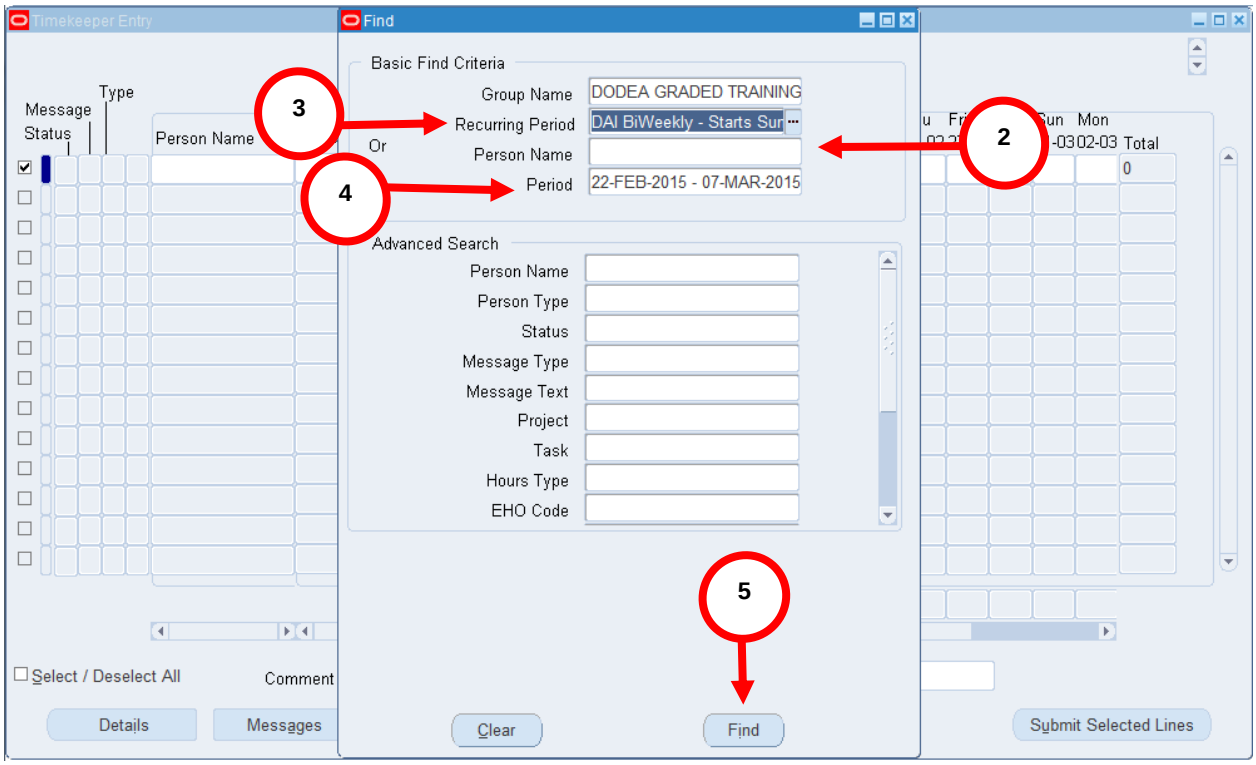
Result

Congratulations! You have successfully created timecard attachments as a Timekeeper in DAI.

View and Modify Timecard Attachments	
1.	Start the task using the responsibility and menu path to open the **Timecard** form: **Responsibility:** Limited Timekeeper – DODEA OR Limited Timekeeper – DODEA – Ungraded Super Timekeeper – DODEA OR Super Timekeeper – DODEA – Ungraded **Menu Path:** Timekeeper Entry



Timekeeper Entry – Find form



The **Timekeeper Entry** form offers two different search options:

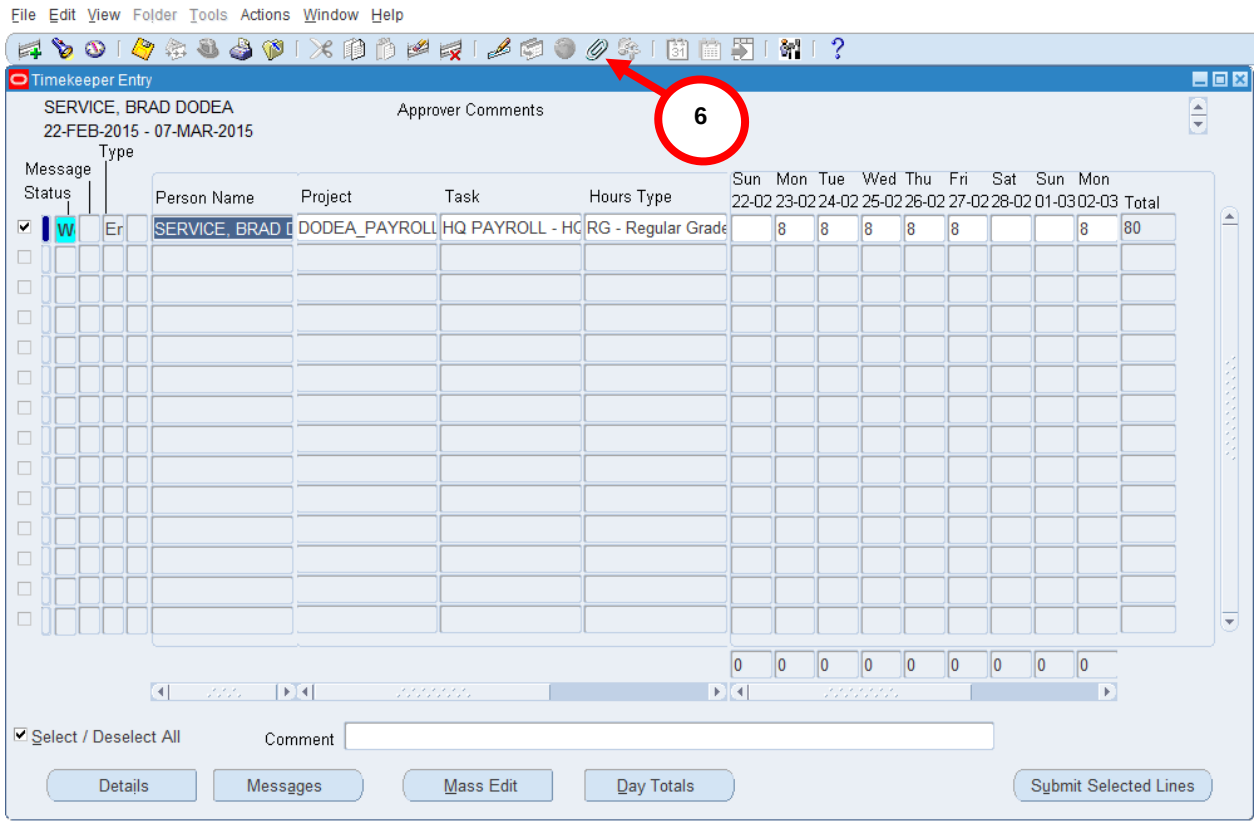
- **Basic Find Criteria**
- **Advanced Search**

To demonstrate attachments, we will use the default **Graded Group** displayed in the **Basic Find Criteria**.

Refer to the ***Enter Time as Timekeeper*** Work Instruction for more information on how to search for specific timecards.

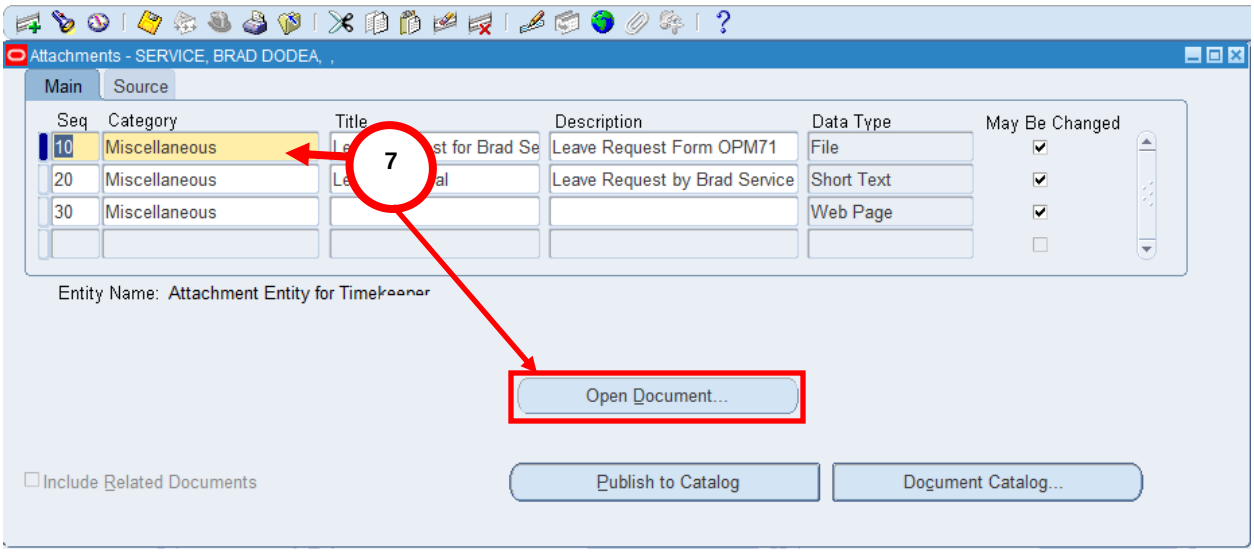
2.	**Group Name** - Select a Timekeeper Group name or use the default Timekeeper Group.
3.	**Recurring Period –** The default value "**DAI Bi-Weekly – Starts Sunday**" is standard for most agencies, indicating timecards are submitted every two weeks and each payroll period starts on a Sunday.
4.	**Period –** The default value is the current **Payroll Period.**
5.	Click the **Find** button to populate the **Timekeeper Entry** form with employee timecards that match the selected criteria.

Timekeeper Entry: Attachment

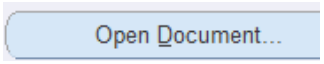


6.	Click the **Attachments…** (Paperclip) icon to view attached documents for the selected timecard.

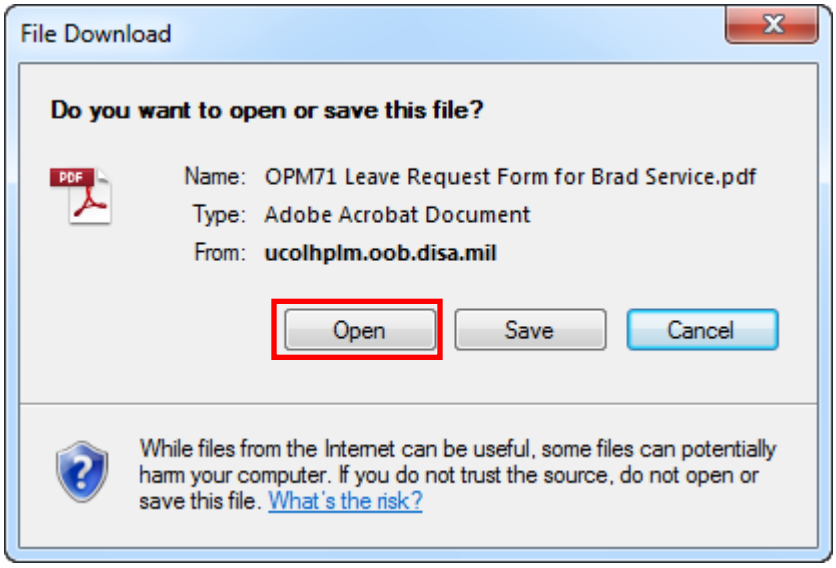
Attachments: View an Attachment



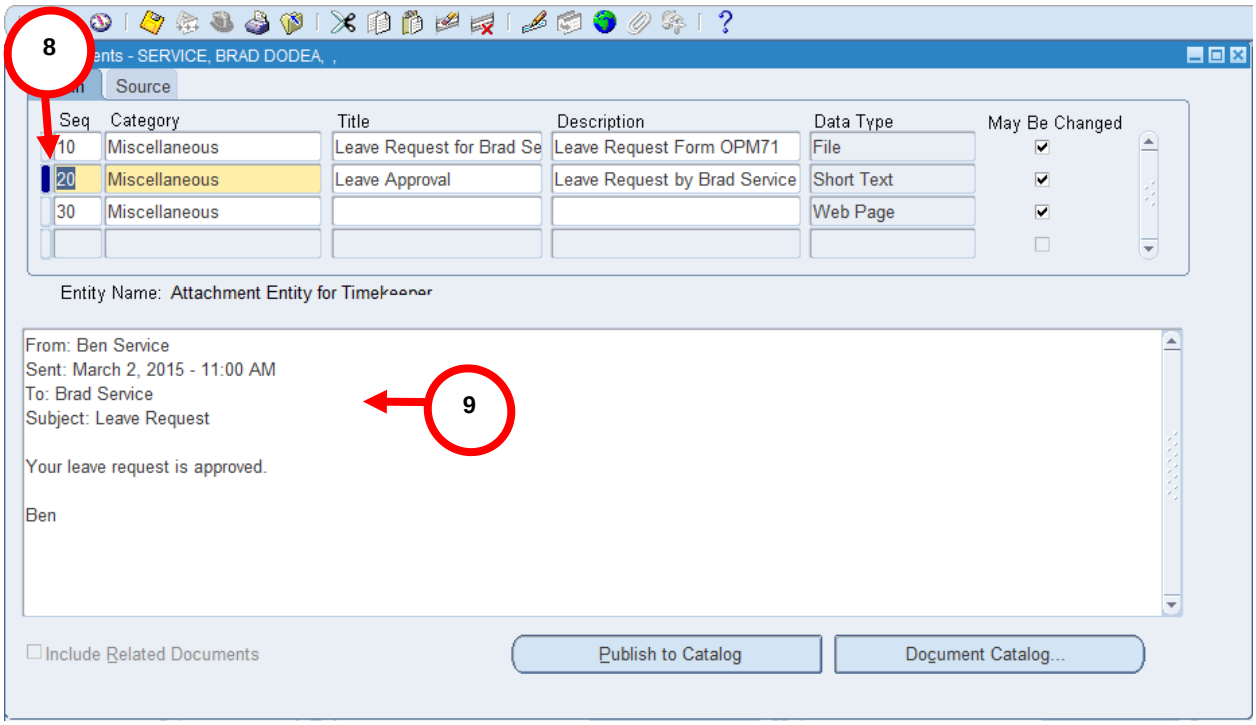
7. Select an item to view an attachment.

- To view attachments with a data type of **Short Text** or **Long Text**, the text is displayed directly in the lower portion of the form.
- To view attachments with a data type of **Web Page**, click the **Open Document** 

button. The web page box will be displayed.
- To view attachments with a data type of **File**, click the **Open Document** button. The File Download dialog box will be displayed. Select **Open**.

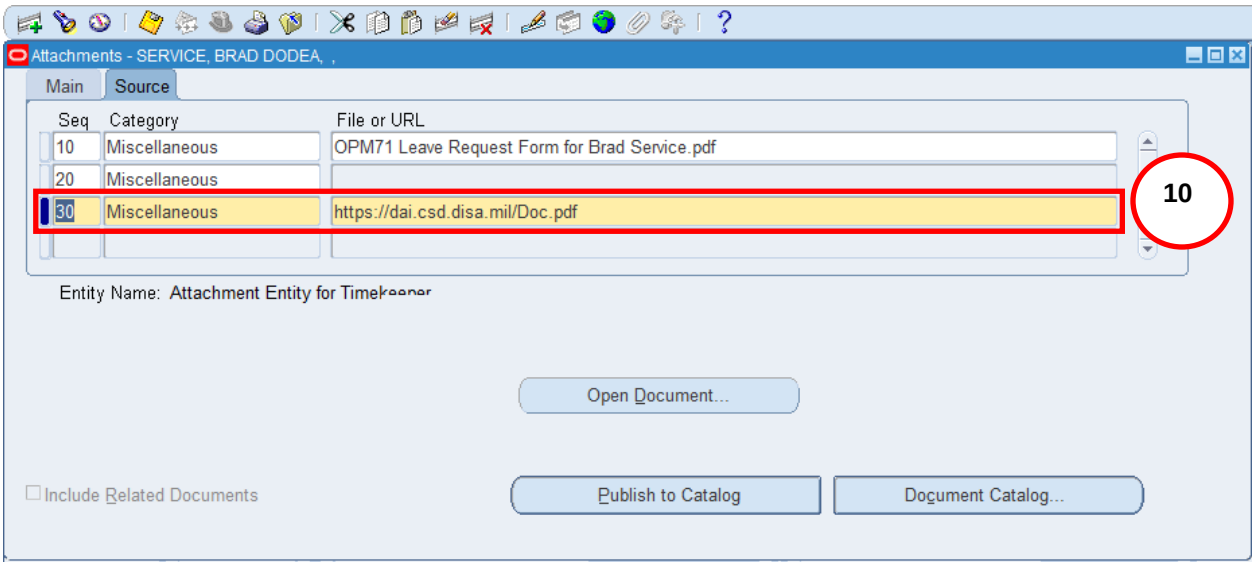


Attachments: Modify a Text or Web Page URL Attachment



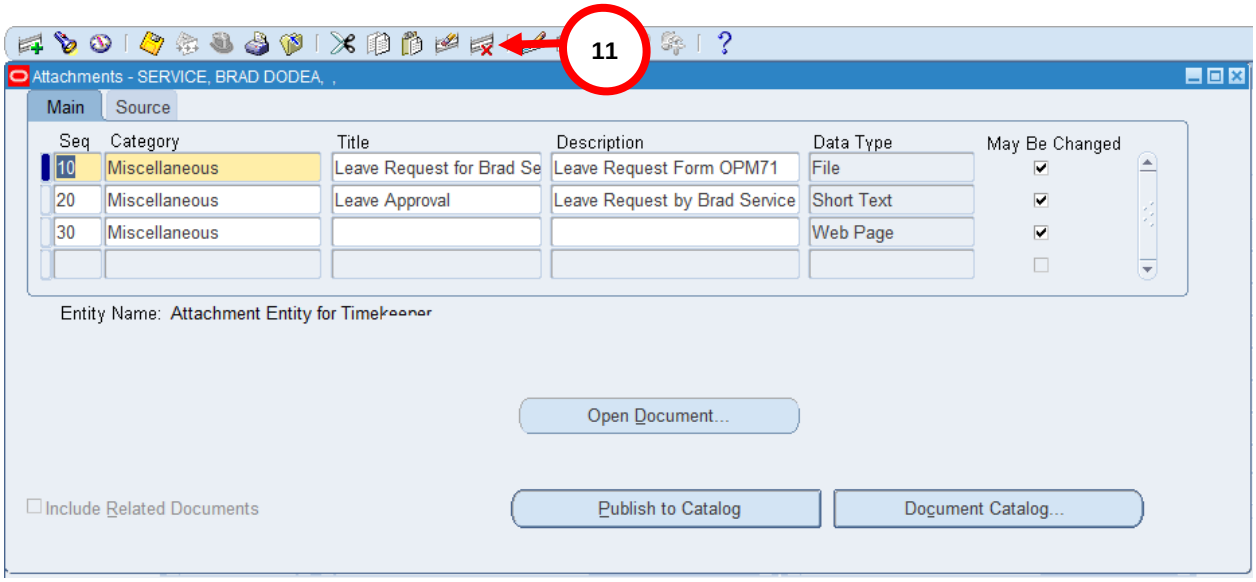
8.	Select a line item to modify a **Text or Web Page** attachment. **NOTE: Short Text**, **Long Text**, and **Web Page** attachments may be modified within the form; however, **Attachments** with a data type of **File** cannot be modified within the DAI Attachments form. In order to change a **File** data type, the file must be deleted and re-attached once modified.
9.	Select a data type of **Short Text** or **Long Text** and edit the text directly in the lower portion of the form.

Source Tab

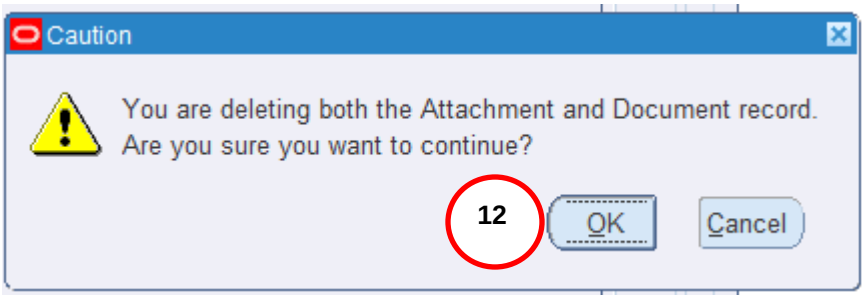
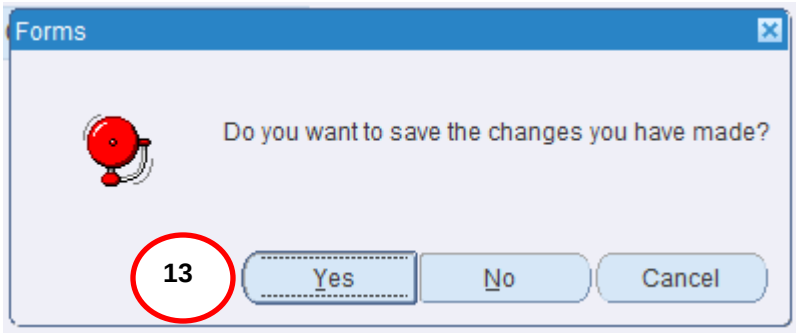


10.	Click the **Source** tab to modify attachments with a data type of **Web Page.** The **File or URL** column will be displayed; edit as necessary.

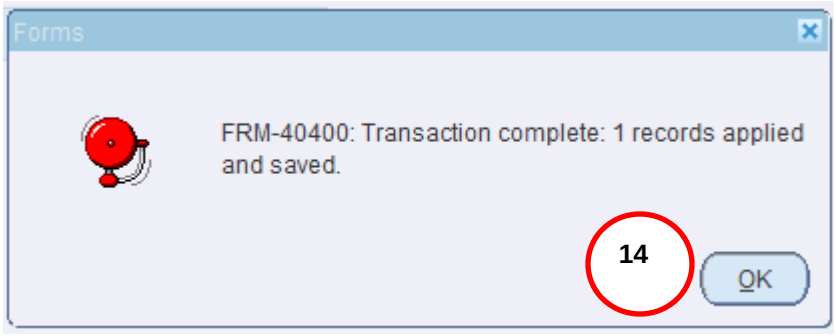
Attachments: Delete a File Attachment



11.	For attachments with a data type of **File**, you must delete the attachment and attach a new file. Click the **Delete** icon on the top menu bar to start the deletion process for the attachment.

Deletion Process - Caution 	
12.	A **Caution** dialog box will be displayed, confirming that an item is about to be deleted. Select from the following choices: • Click the **OK** button to continue the deletion of the **Attachment and Document** process. **Note**: The deletion of the attachment is not completed until the file is saved. • Click the **Cancel** button to opt out of the **Caution** dialog box and to retain the attachment.
Deletion Process - Forms 	
13.	Click the **Yes** button to save the changes made to the **Attachments** form and to complete the deletion process of removing that data type from the **Attachments** form. **Note:** If **No** is selected, the file will return to the **Attachments** form and will not have been deleted. Select the **Cancel** button to return to the previous screen.

Deletion Process

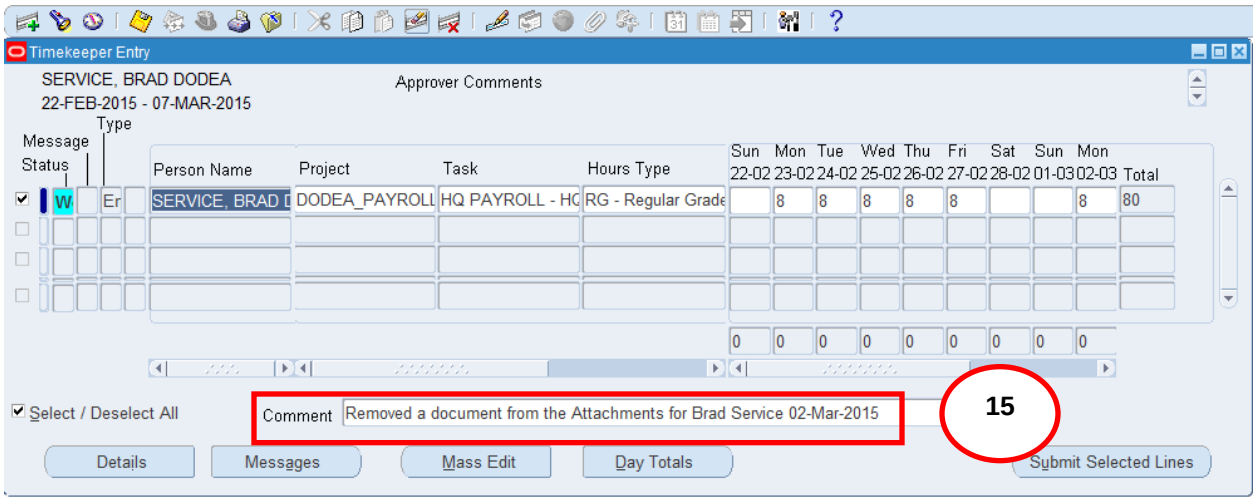


14.	Click the **OK** button on the **Forms** confirmation and return to the timecard for resubmittal.

Resubmit Timecard with an Attachment modification or deletion.

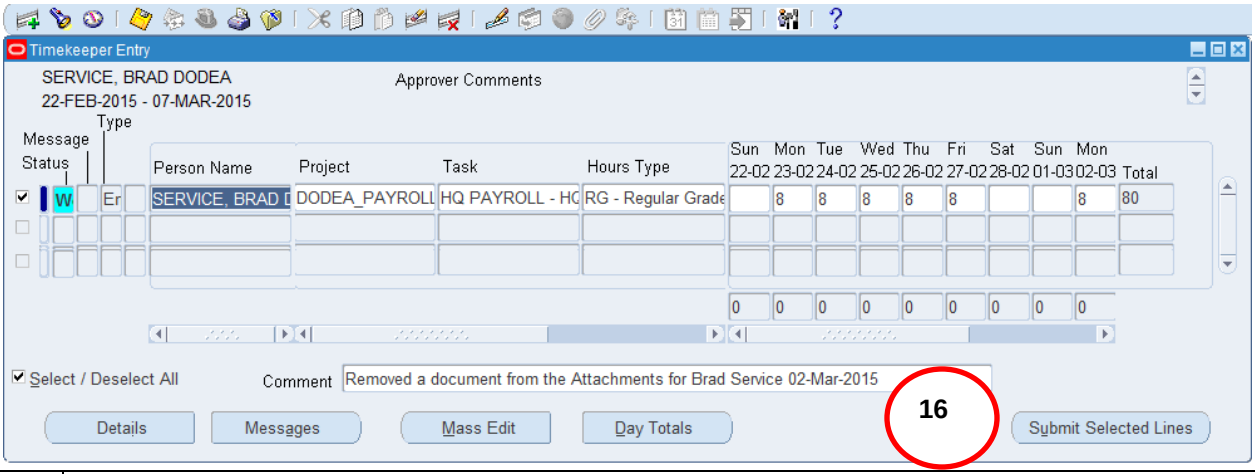
NOTE: In order to resubmit the timecard, enter text into the **Comments** section describing what has changed on the **Attachments** form, in order for the supervisor to receive an updated notification about the changes to the attachment(s). The timecard **must be** processed with a change on the timecard itself in order to activate the resubmittal process.

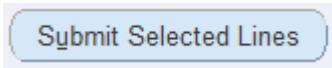
Resubmittal - Complete Comments

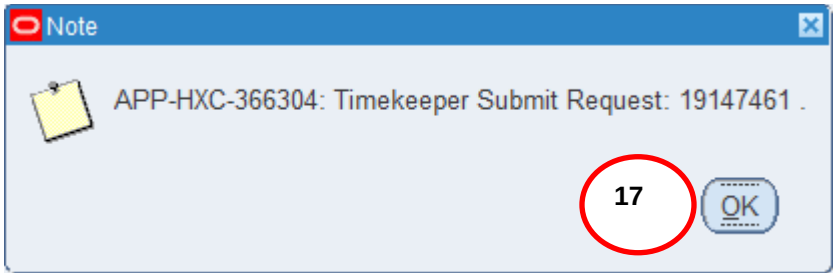


15.	Enter comments in the **Comment** field describing the change made to the **Attachments** form.

Resubmit Timecard – Submit Selected Lines



16.	Click the **Submit Selected Lines**  button to submit the timecard. A **Note** dialog box will be displayed, indicating the timecard has been submitted.



17	Click the **OK** button to confirm.
18.	Re-query the timecard in the Timekeeper Entry form by pressing **CTRL + F11**. Confirm the status has changed to Submitted.

Result

Congratulations! You have successfully viewed and modified timecard attachments as a Timekeeper in DAI.