ATTACHMENT 7.a

PeopleSoft Timecard System Documentation

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System Documentation
Time Entry System

July 2006
Paula Guthrie

Setup Tables

Activities Springfield PSTC - Activities Setup Editor	**Crews** Springfield PSTC - Crew Setup Editor	**Customer Groups** Springfield PSTC - Customer Group Editor
Customers Springfield PSTC - Customer Setup Editor	**Earning Codes (Payroll Setup)** Springfield PSTC - Earning Code Extensions setup for Payroll	**Earning Codes Mapping (TC Grp)** Springfield PSTC - Earnings Code Mapping Editor for TC Groups
Equipment Springfield PSTC - Equipment Editor	**Laborcodes** Springfield PSTC - Laborcode Setup	**Materials** Springfield PSTC - Materials Setup Editor
Profile Synch with JOB_DATA Springfield PSTC - Job-Profile synch run-control	**Profiles** Springfield PSTC - Timecard Profiles setup editor	**Project Types** Springfield PSTC - Project Types
Projects Springfield PSTC - Projects Setup Editor	**Rate Adjustment - By Jobcode** Springfield PSTC - Rate Adjustments by Jobcode	**Rate Adjustment Rules** Springfield PSTC - Rate Adjustment Rules Editor
Rate Adjustments - By Employee Springfield PSTC - Rate Adjustments by Employee	**Schedule Modelling** Springfield PSTC - Schedule Modelling	**Service Rates** Springfield PSTC - Service Rate Setup Edit
Shifts - By Union Springfield PSTC - Shift Setups by union	**Timecard Group Settings** Springfield PSTC - Timecard Group Settings	**TC Admin Filters** Springfield PSTC - Administer Timecards page Filter setup editor
TC Group Lookups Springfield PSTC - TC Group Lookups Editor	**Tasks** Springfield PSTC - Task Setup Editor	**Units of Measure** Springfield PSTC - Units of Measure setup editor

Standard Setup

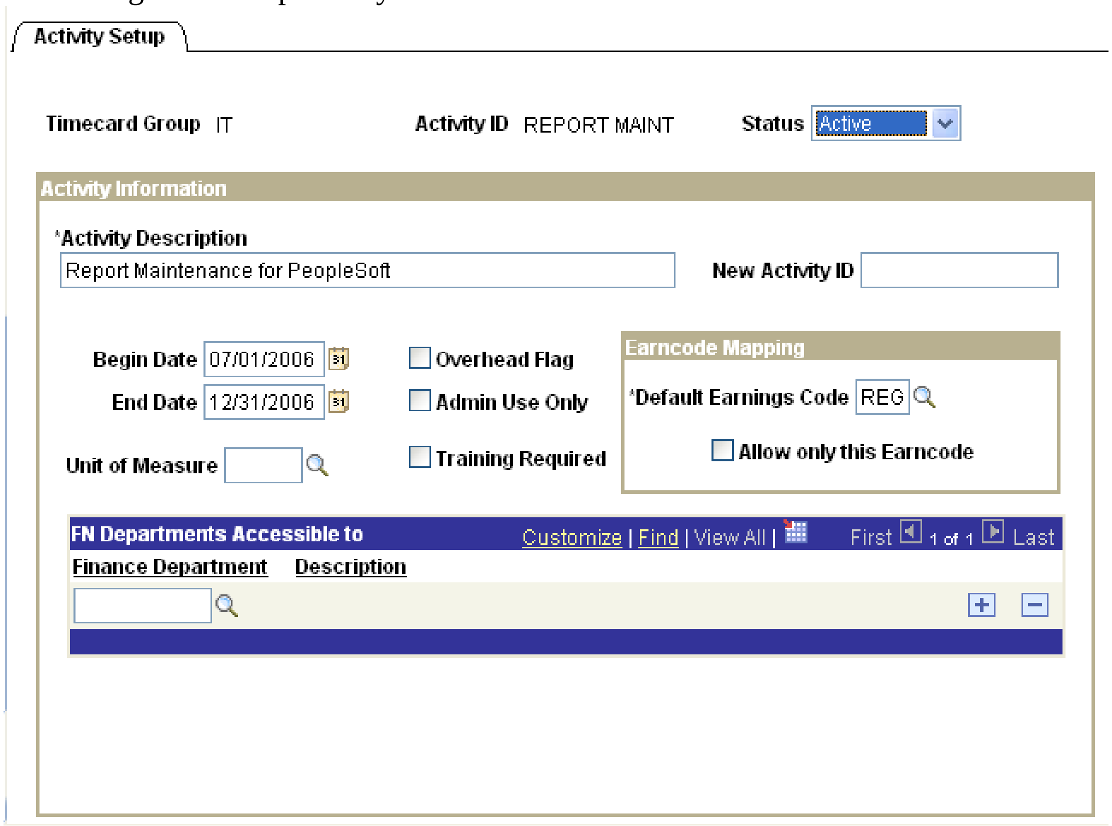
There is a set standard in which you need to enter in the information for setup. There are tables that depend on other tables so the setup needs to happen in a specific order. The order is

1. Create Timecard Group
2. Setup Crews
3. Setup Customers (default only if you are not using Project and Task)
4. Setup Tasks (default only if you are not using Project and Task)
5. Setup Project Types (only if we are going to use project types)
6. Setup Projects (different than our projects. Only used if we are going to use project types)
7. Setup Labor Codes
8. Create Profiles for employees
9. Map Earning Codes to employee Profiles

10. Time cards should be viewable and ready for entry

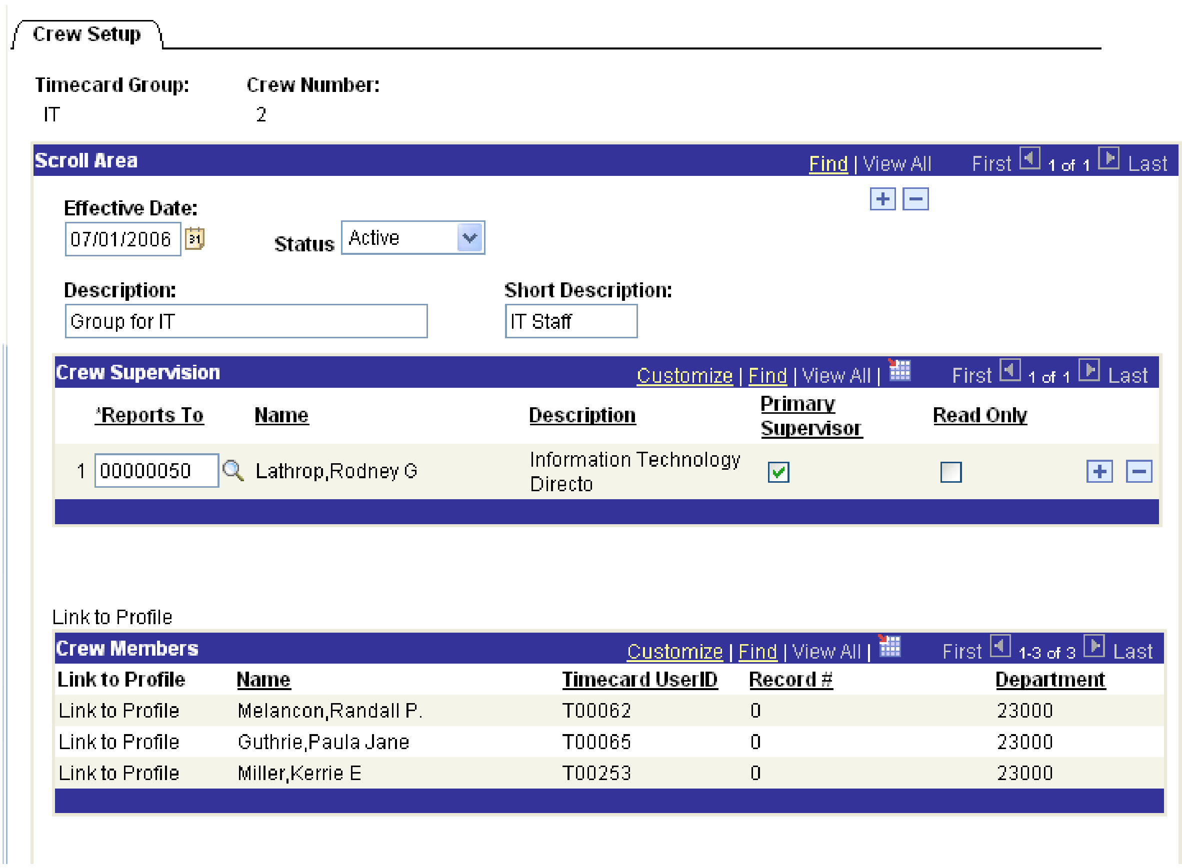
Activities

This is a description field that is automatically populated upon entering in the Labor Code, Project, Task, etc. This field is used at Lane County for public works activity codes for cost accounting. We will probably never use it.



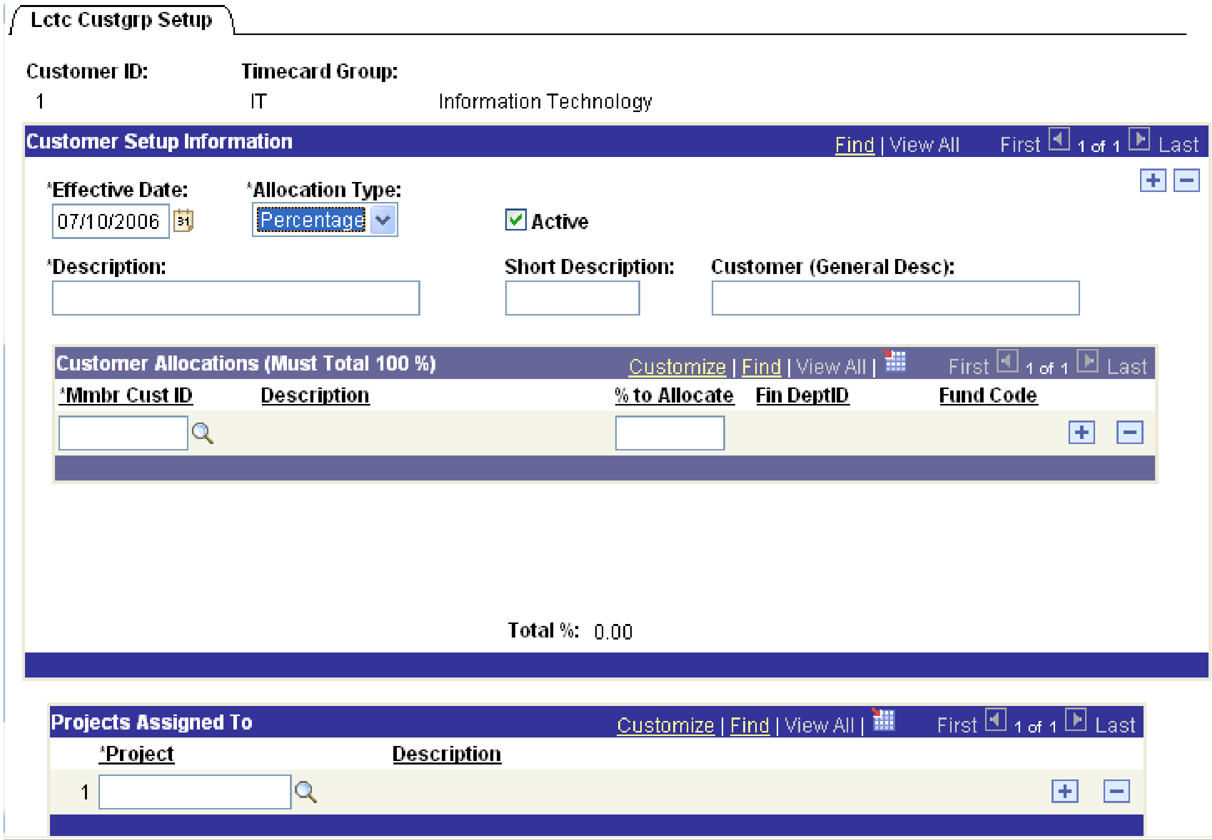
Crews

The crew setup is used to setup groups of employees and the person that supervises them for review of timecard and check off.



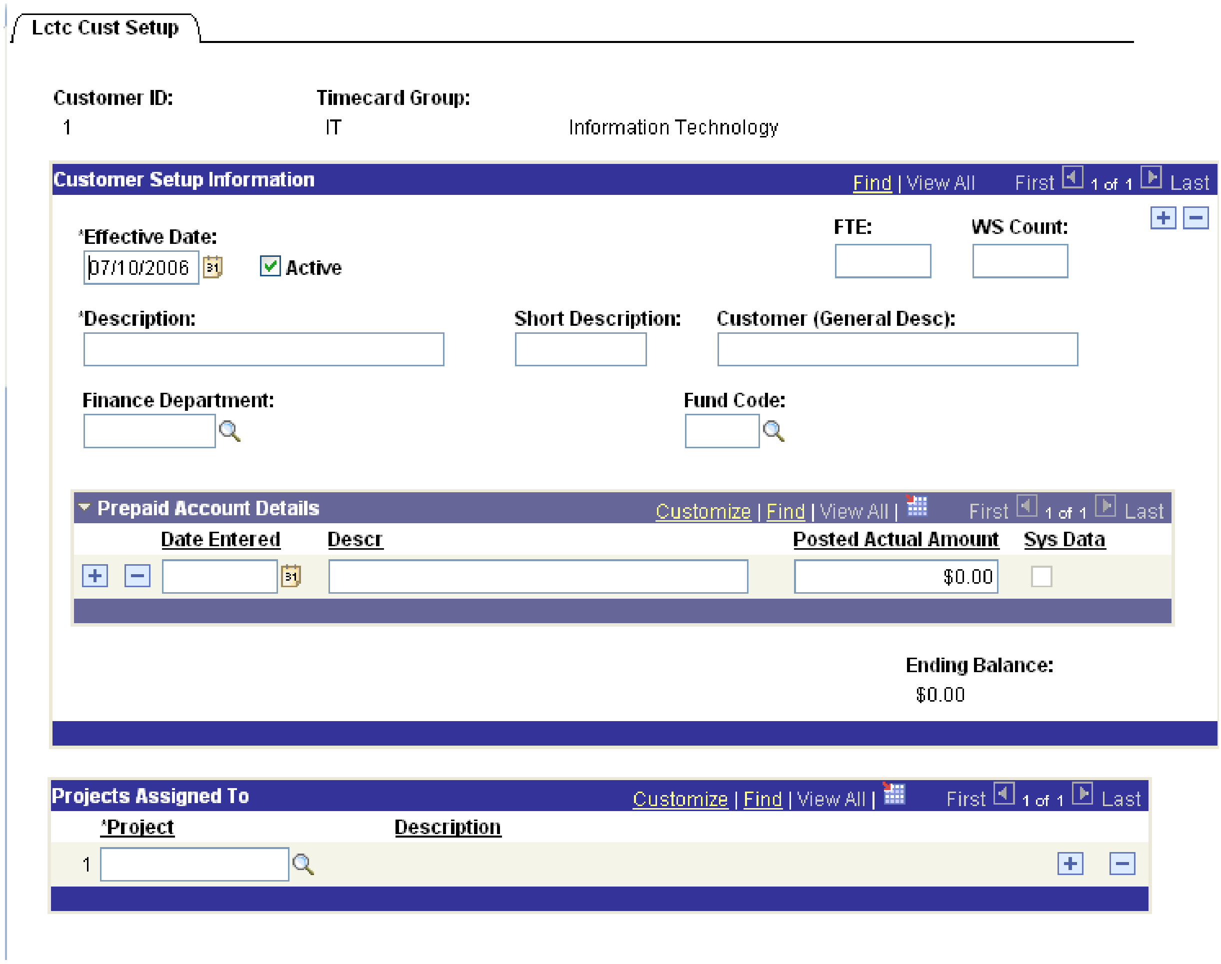
Customer Groups

This is for grouping of customers. Doubt we will use it as Lane County uses this as part of their billing module.



Customers

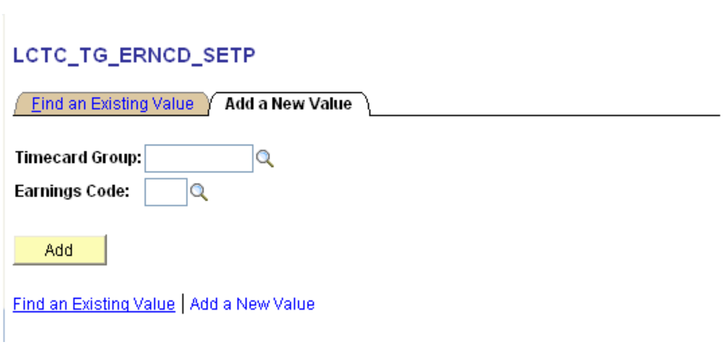
This is the setup editor to create customers. We probably won't be using this as we don't bill to customers at Springfield.



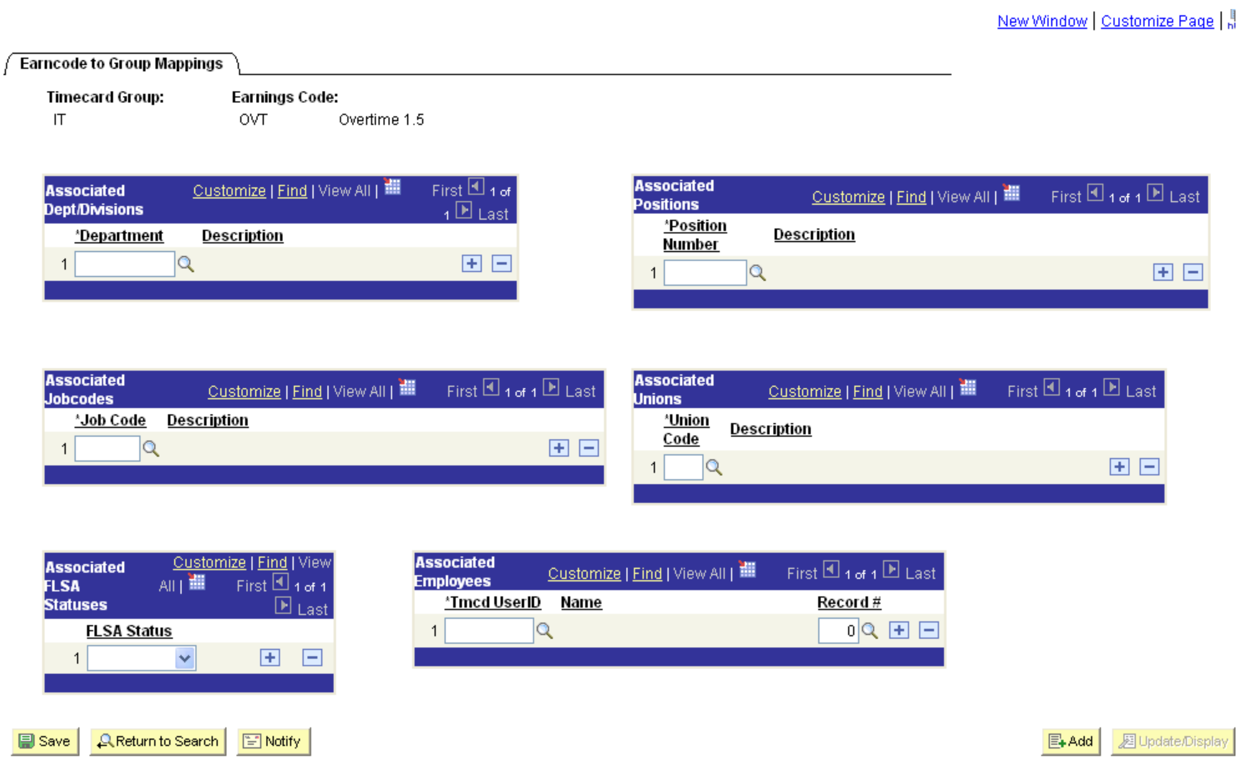
Earning Codes Mapping (TC Grp)

Page used by timecard groups to give TG specific settings and map earning codes to employees. This is more granular association.

1. Enter in Timecard Group and Earnings Code to map the earnings code to a more detailed group.

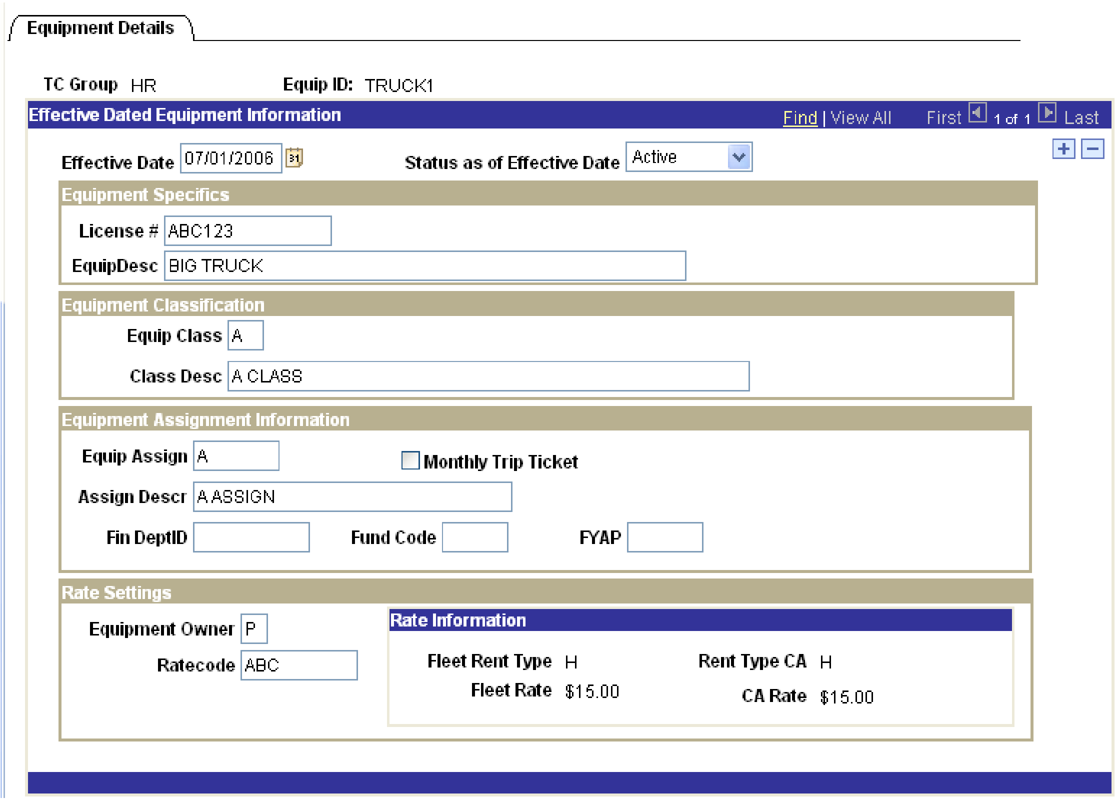


2. Associated Dept/Divisions – Enter in department or division that has access to this earnings code in this TC Group
3. Associated Positions – Enter in positions that have access to this earning code in this TC Group
4. Associated Jobcodes – Enter in jobcodes that have access to this earnings code in this TC Group
5. Associated Unions – Enter in union code that have access to this earnings code in this TC Group
6. Associated FLSA Statuses – Enter in FLSA status for use with earnings code in this TC Group
7. Associated Employees – Enter in employee ids to be used with this earning code in this TC Group (Can be used for injury leave or any special leave for an individual employee)



Equipment

At LC PW they have a fleet system that they use to import the data for this component.



Equipment Details

TC Group HR Equip ID: TRUCK1

Effective Dated Equipment Information — Find | View All — First 1 of 1 Last

Effective Date 07/01/2006 Status as of Effective Date Active

Equipment Specifics

License # ABC123

EquipDesc BIG TRUCK

Equipment Classification

Equip Class A

Class Desc A CLASS

Equipment Assignment Information

Equip Assign A Monthly Trip Ticket

Assign Descr A ASSIGN

Fin DeptID Fund Code FYAP

Rate Settings

Equipment Owner P

Ratecode ABC

Rate Information

Fleet Rent Type H Rent Type CA H

Fleet Rate $15.00 CA Rate $15.00

Laborcodes

Laborcodes is a shortcut name for the account code combination of fund, dept, account, and project. The laborcodes were setup by loading the information from PeopleSoft on what account code combinations that have been used in the last year.

1. The labor code is setup fund, dept, project id (if there is one). It does not include the account.
2. The account code piece is the whole account code combination that includes the account.
3. The description is the short description fund code, short description dept, and the whole project description if there is a project code.
4. The laborcode short description is only the short description of the dept.
5. Each labor code is assigned to a timecard group.

Find an Existing Value | Add a New Value

Search by: Timecard Group begins with

Search | Advanced Search

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All First 1-100 of 300 Last

Timecard Group	Labor Code	Account Code	Description	Short Description
CMO	100-01110	100-01110-510000	Gen Fd-CMO Admini	CMO Admini
CMO	100-01110-P60116	100-01110-510000-P60116	Gen Fd-CMO Admini-Budget Preparation	CMO Admini
CMO	100-01130	100-01130-510000	Gen Fd-Economic D	Economic D
CMO	208-01130	208-01130-510000	TRT Fund-Economic D	Economic D
COURT	100-04210	100-04210-510000	Gen Fd-Court	Court
COURT	236-04210	236-04210-510000	Pol Levy-Municipal	Municipal
DSD	100-63100	100-63100-510000	Gen Fd-DSD Admin	DSD Admin
DSD	100-63100-P60116	100-63100-510000-P60116	Gen Fd-DSD Admin-Budget Preparation	DSD Admin
DSD	100-63300	100-63300-510000	Gen Fd-Comm Serv	Comm Serv
DSD	100-63301	100-63301-510000	Gen Fd-Gen Prop M	Gen Prop M
DSD	100-63500	100-63500-510000	Gen Fd-Urban Plan	Urban Plan
DSD	100-63500-P20208	100-63500-510000-P20208	Gen Fd-Urban Plan-Pioneer Parkway Extension	Urban Plan
DSD	100-63600	100-63600-510000	Gen Fd-CommunPl	CommunPl
DSD	100-63600-G36044	100-63600-510000-G36044	Gen Fd-CommunPl-SHPO Sal/Ben match	CommunPl
DSD	201-63500	201-63500-510000	Street-Urban Plan	Urban Plan
DSD	201-63600	201-63600-510000	Street-CommunPl	CommunPl

To enter in a laborcode.

1. Verify that the laborcode is not setup in the system currently.
2. Click on Add to add a new laborcode

Laborcode Setup

Find an Existing Value | Add a New Value

Timecard Group:

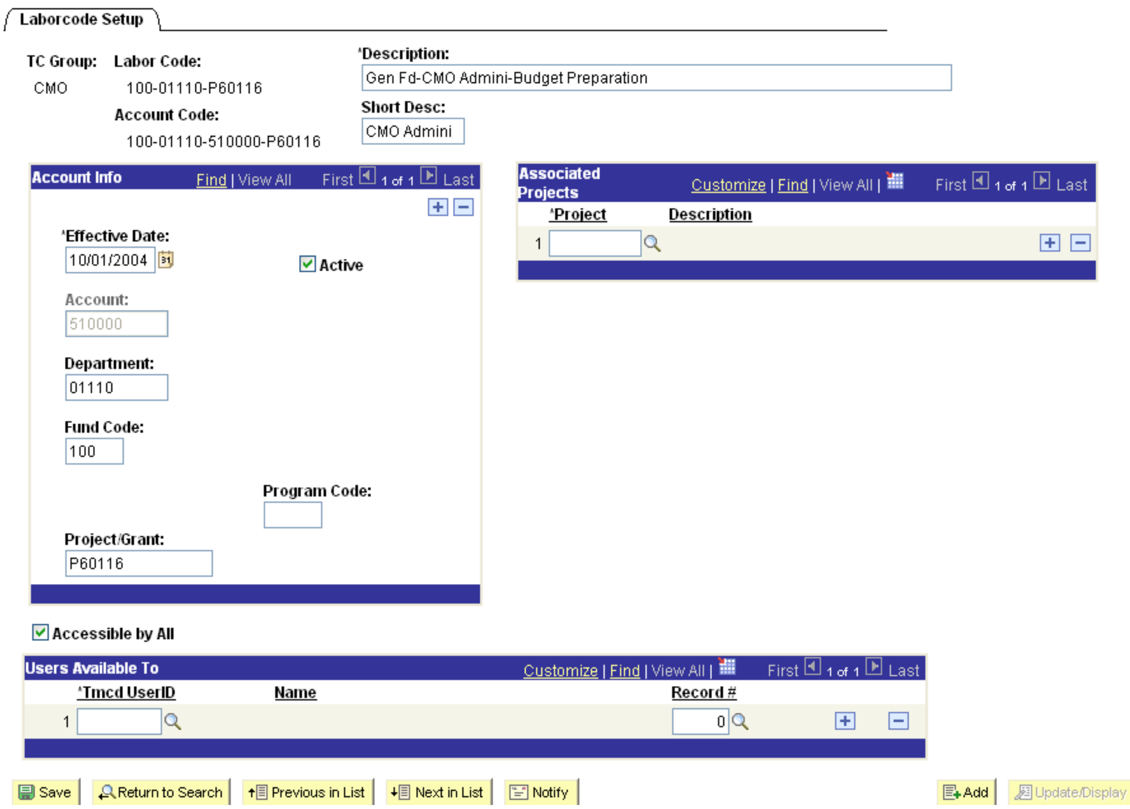
Labor Code:

Account Code:

Add

Find an Existing Value | Add a New Value

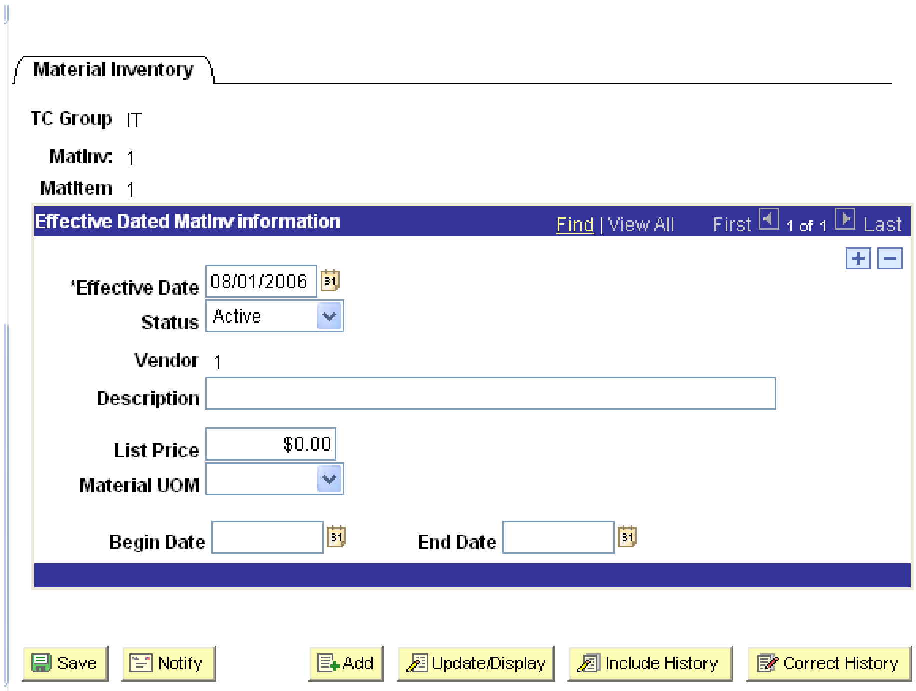
3. Enter in the timecard group on what department that this laborcode is associated with.
4. Enter in the labor code. Make sure and put in dashes between the chartfields. (ex: Fund 100, department 23410, and account 510000 would be laborcode of 100-23410. ex: Fund 612, department 62263, account 510000, and project P10455 would be laborcode of 612-62263-P10455.)
5. Enter in the account code. This includes all of the account code combination fields including account. So by using the above examples the account code would be (100-23410-510000 and 612-62263-510000-P10455)
6. Click on ADD



7. On the page, enter in the Description. You need to use the format that was approved. Fund code short description, dash, department short description, dash and project long description if there is a project.
8. On the page, enter in the Short Desc. You need to use the format that was approved, department short description.
9. Check on the Accessible by All to make this code accessible to everyone in that department.
10. If there is a smaller group of employees that will use this code, you can then specify the users available to: use this account code combination.
11. The associated projects has to do with the LC project definition not ours. We are not planning on using this right now.

Materials

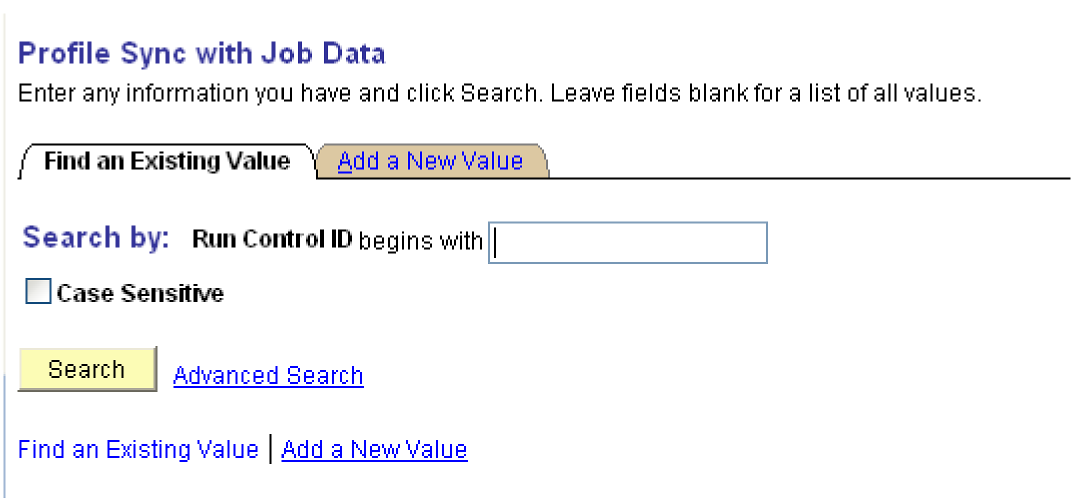
Material Inventory is used by LC to track what employee working on a project, uses what materials, for what time period, and using what equipment and what units of measure. We will not be using this.



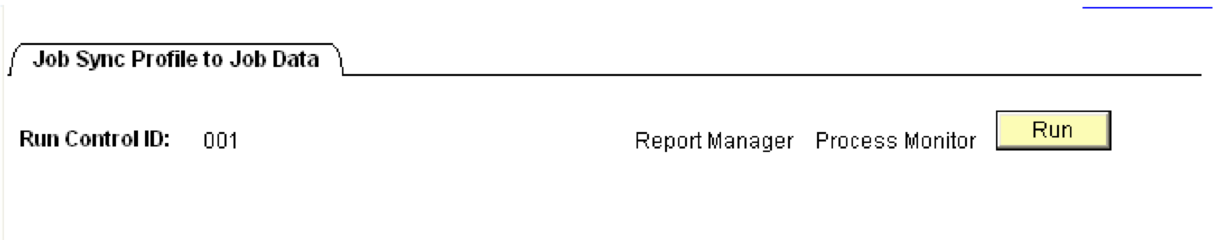
Profile Synch with JOB_DATA

Profile Synch is used to sync up the Profile data with Job Data. This is an app engine program. It should be ran every night or when a new employee is added in Profile or in Job Data. No updates are made to the Job Data record. It is only updating the profile records for Time Entry.

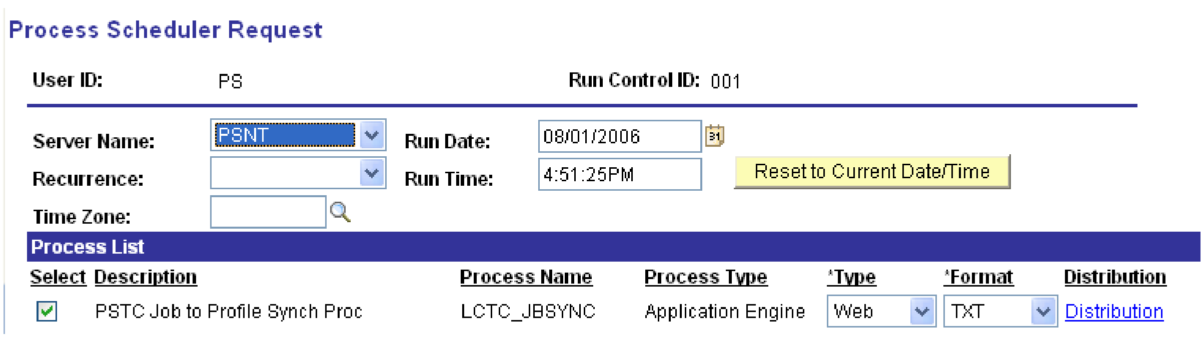
1. Navigate to Set Up HRMS > SPR Timecard Setups > Profile Synch with JOB_DATA
2. Enter in the run control



3. There are not any parameters that need to be entered for this program to run.



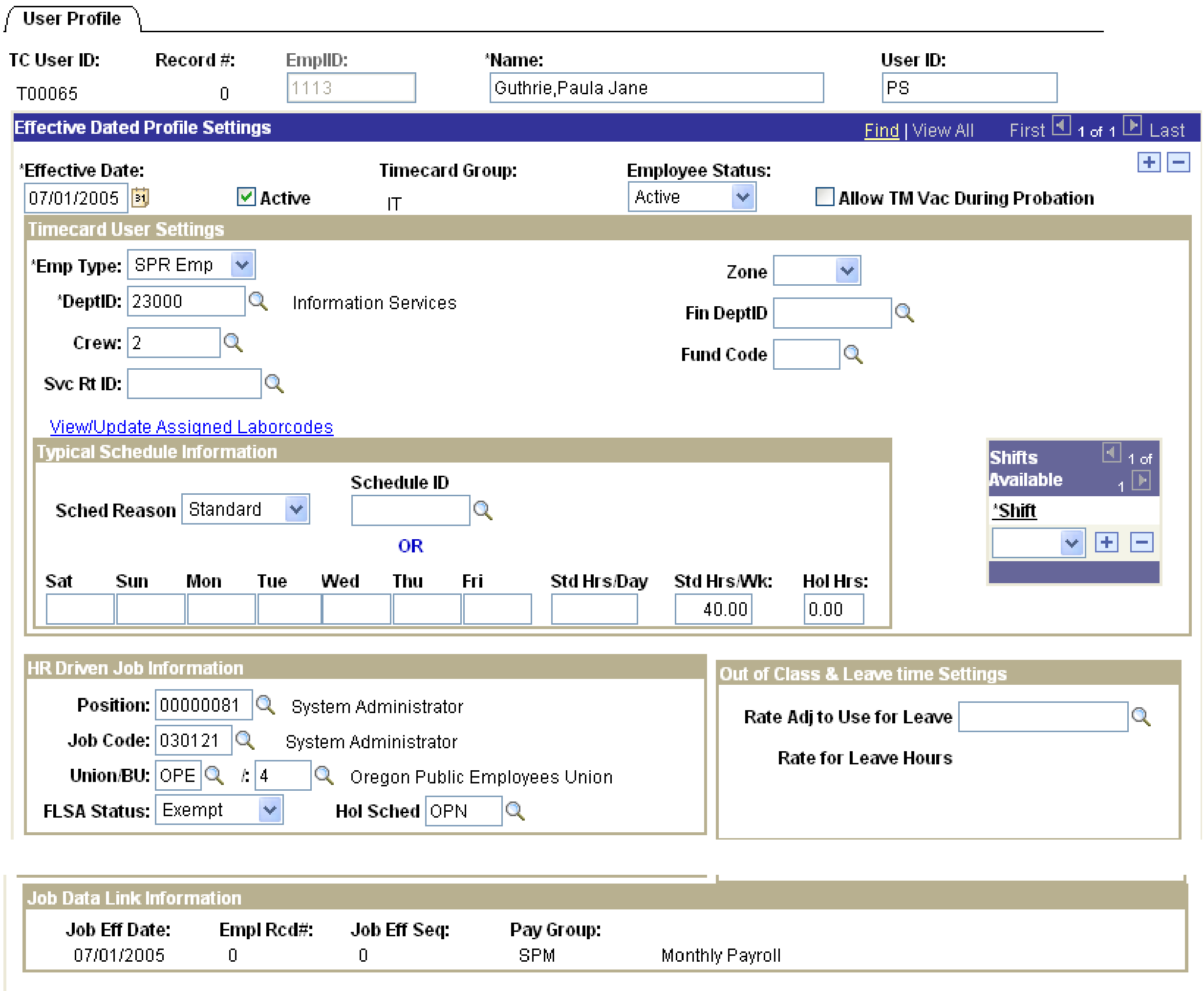
4. Run the process LCTC_JBSYNC app engine.
5. It will then sync up the Profile to match what is in Job Data page



Profiles

Profiles is the page that is used for every employee to track different information that is needed for timecards. It can also be used for contractors, volunteers, etc. Those records will not come over to paysheets but be held in timecards for tracking and reporting purposes.
The effective date is very sensitive for employees. If an employee is transferred to another department, it affects their timecard displays. Make sure and put in accurate effective dates if an employee is being transferred or is taking another job.
The profile sync job should be run every night to create or update the profile records. You can create a profile record if the employee record has not been created yet.
Once a profile is created, you will need to add the laborcodes, crew and holiday hours for that employee.

If a person cannot login, it is probably because their profile user id is not the correct user id. Go into their profile and make sure their userid is the first four characters of their last name and the last 4 digits of their social security number. If it isn't, change it, save the record and the employee should then be able to login.


User Profile

TC User ID: T00065 | Record #: 0 | EmplID: 1113 | *Name: Guthrie,Paula Jane | User ID: PS

Effective Dated Profile Settings Find | View All First 1 of 1 Last

*Effective Date: 07/01/2005 | Active | Timecard Group: IT | Employee Status: Active | Allow TM Vac During Probation

Timecard User Settings

*Emp Type: SPR Emp | Zone
*DeptID: 23000 Information Services | Fin DeptID
Crew: 2 | Fund Code
Svc Rt ID:

View/Update Assigned Laborcodes

Typical Schedule Information

Sched Reason: Standard | Schedule ID

OR

Sat	Sun	Mon	Tue	Wed	Thu	Fri	Std Hrs/Day	Std Hrs/Wk:	Hol Hrs:
								40.00	0.00

Shifts Available 1 of 1
*Shift

HR Driven Job Information

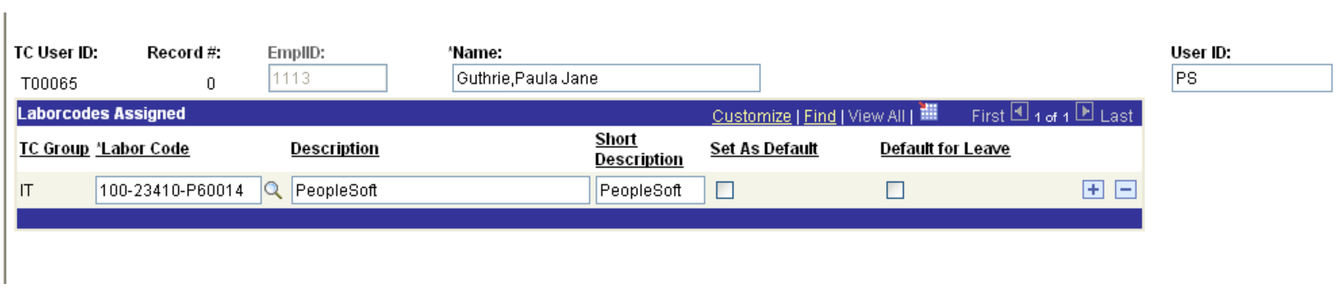
Position: 00000081 System Administrator
Job Code: 030121 System Administrator
Union/BU: OPE / 4 Oregon Public Employees Union
FLSA Status: Exempt | Hol Sched OPN

Out of Class & Leave time Settings

Rate Adj to Use for Leave
Rate for Leave Hours

Job Data Link Information

Job Eff Date:	Empl Rcd#:	Job Eff Seq:	Pay Group:	
07/01/2005	0	0	SPM	Monthly Payroll

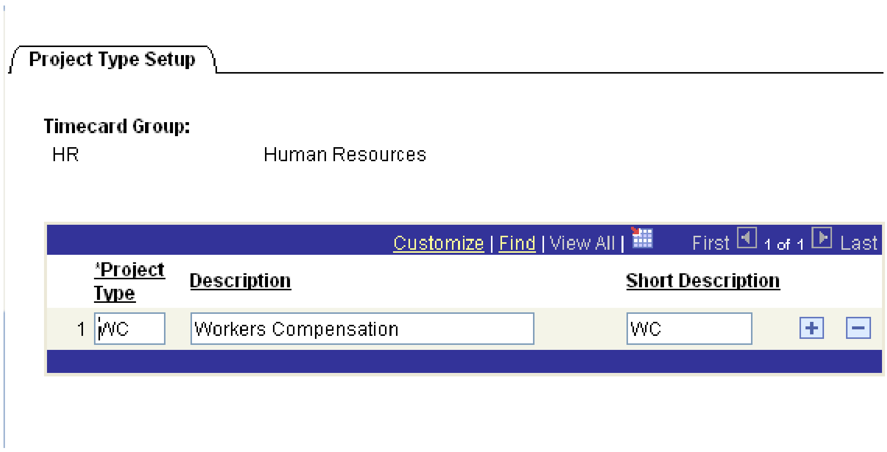

TC User ID: T00065 | Record #: 0 | EmplID: 1113 | *Name: Guthrie,Paula Jane | User ID: PS

Laborcodes Assigned Customize | Find | View All | First 1 of 1 Last

TC Group	*Labor Code	Description	Short Description	Set As Default	Default for Leave
IT	100-23410-P60014	PeopleSoft	PeopleSoft		

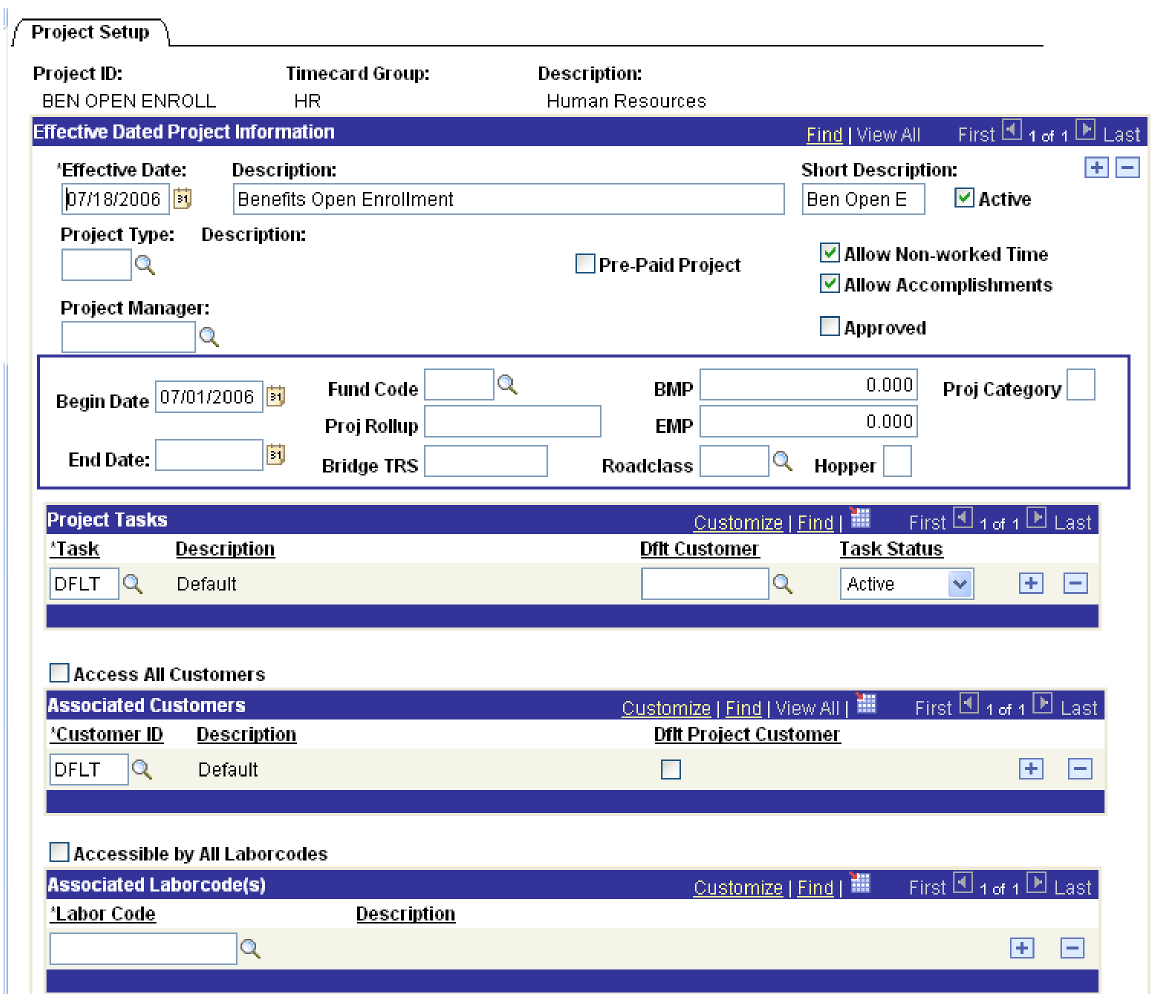
Project Types

Project Types



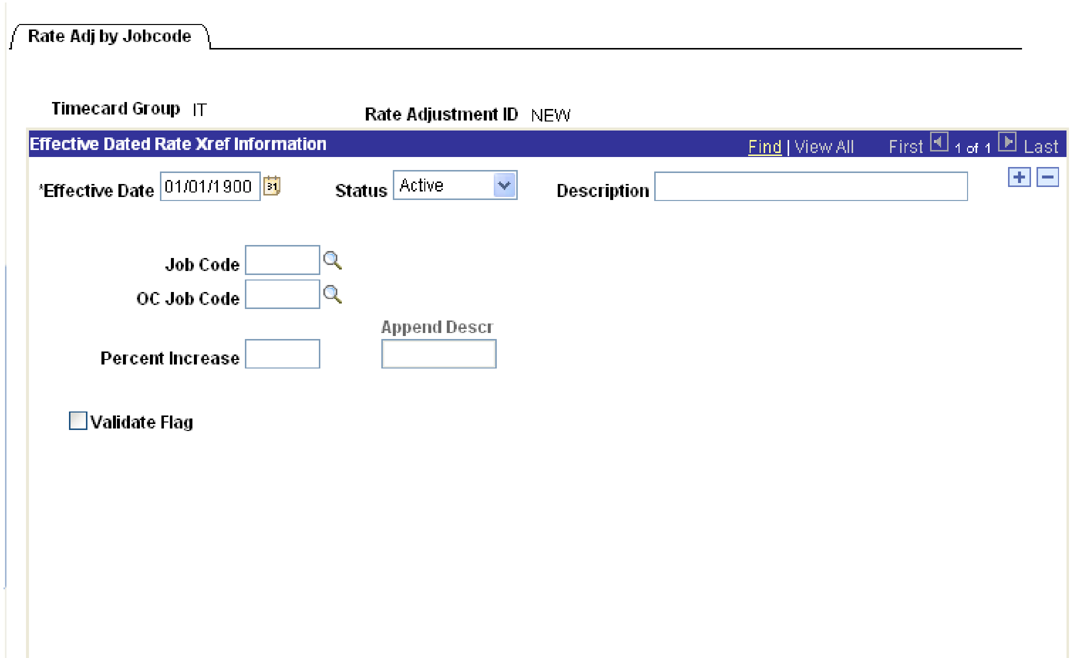
Projects

Projects



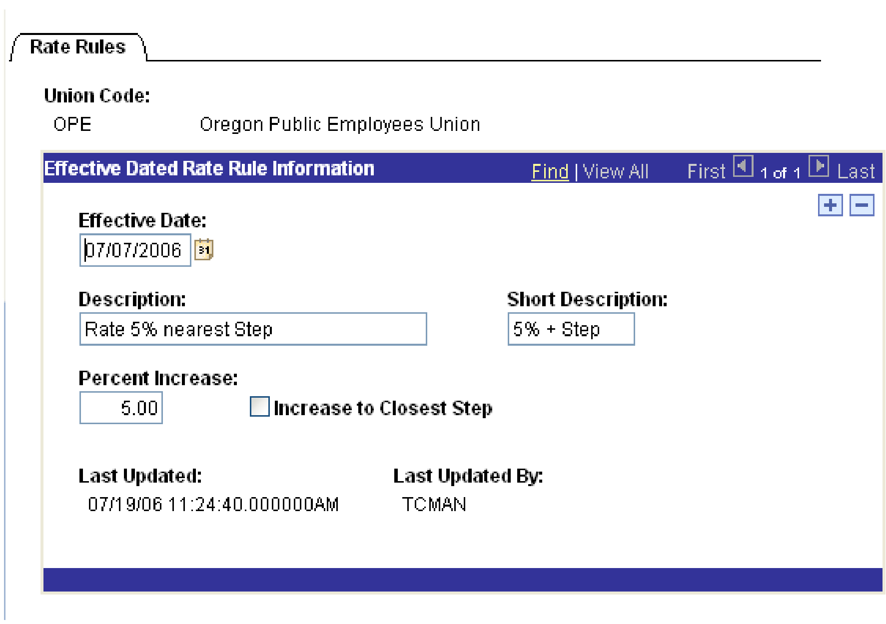
Rate Adjustment - by Jobcode

Rate jobcode



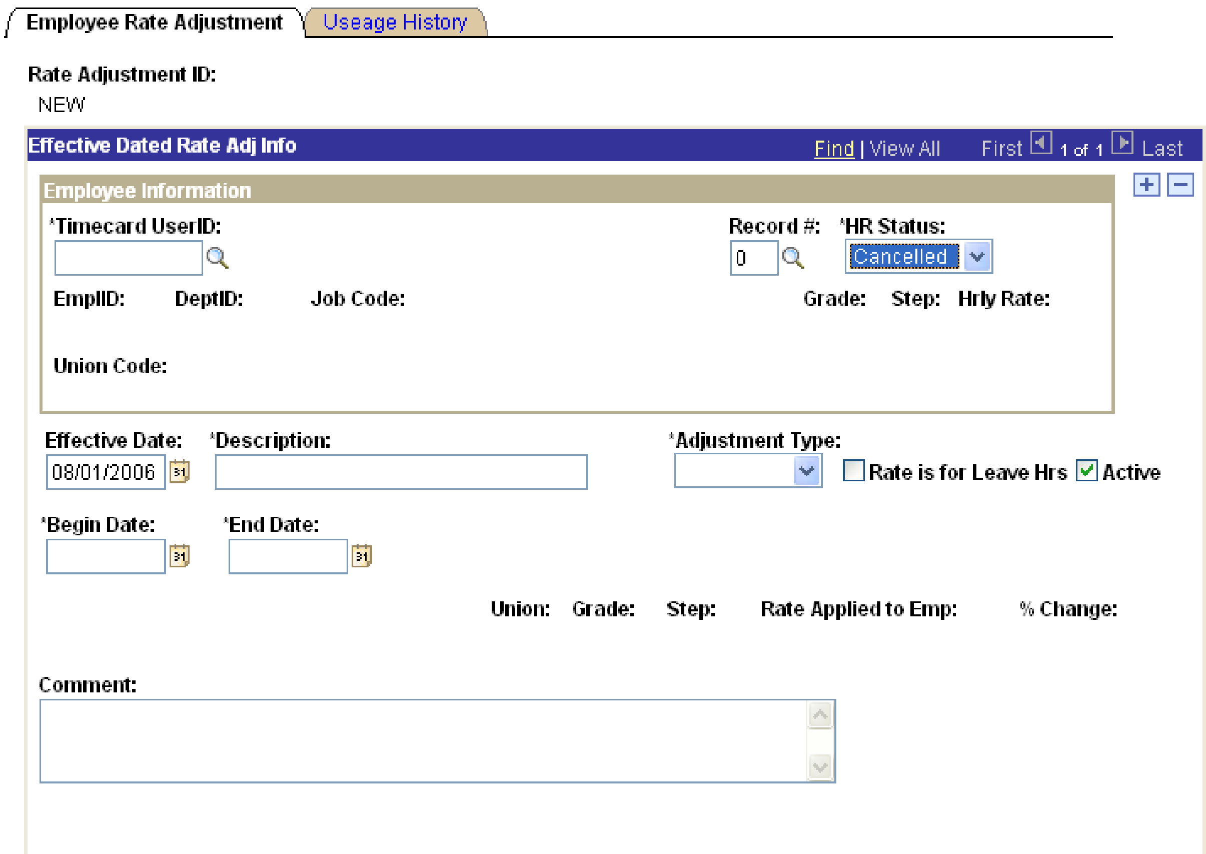
Rate Adjustment Rules

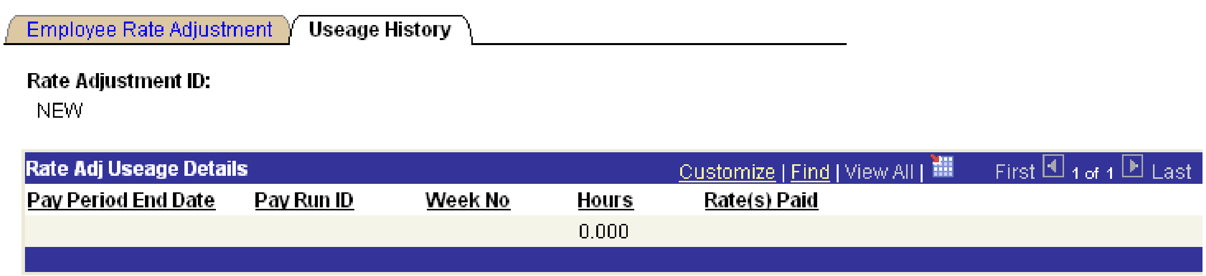
Rate rules



Rate Adjustments – by Employee

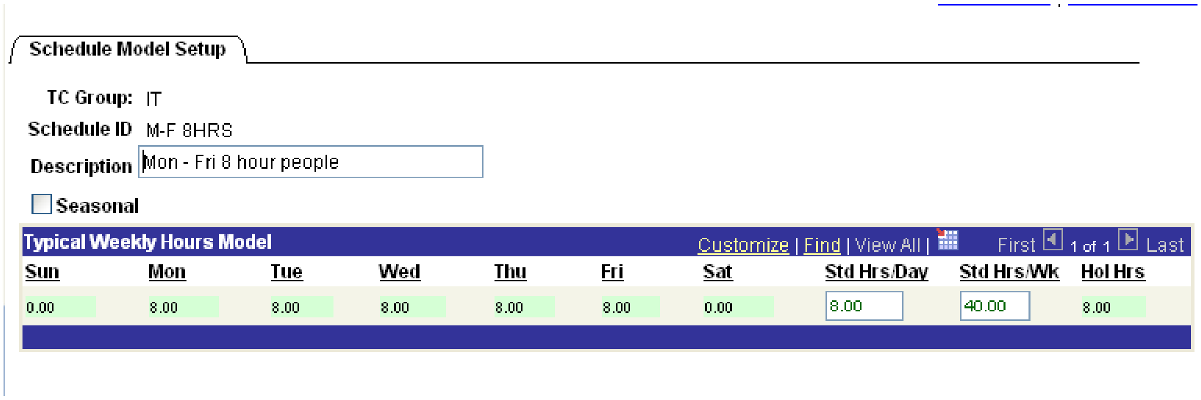
Rate employee





Schedule Modelling

Modeling



Schedule Model Setup

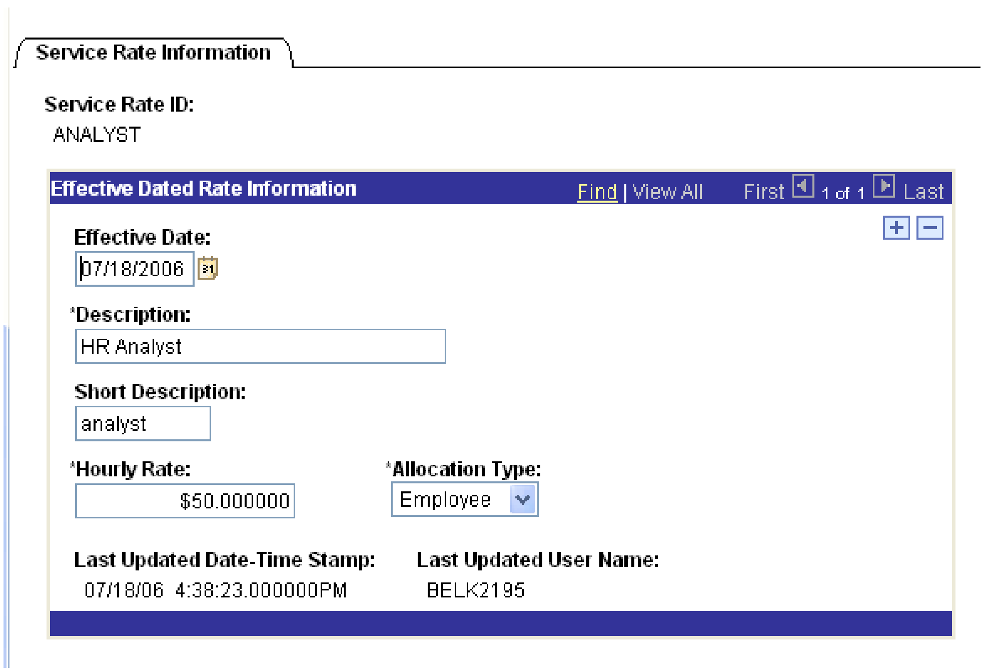
TC Group: IT
Schedule ID M-F 8HRS
Description Mon - Fri 8 hour people
Seasonal

Typical Weekly Hours Model — Customize | Find | View All | First 1 of 1 Last

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Std Hrs/Day	Std Hrs/Wk	Hol Hrs
0.00	8.00	8.00	8.00	8.00	8.00	0.00	8.00	40.00	8.00

Service Rates

Service rates – how much worth for billing purposes



Service Rate Information

Service Rate ID:
ANALYST

Effective Dated Rate Information — Find | View All First 1 of 1 Last

Effective Date:
07/18/2006

*Description:
HR Analyst

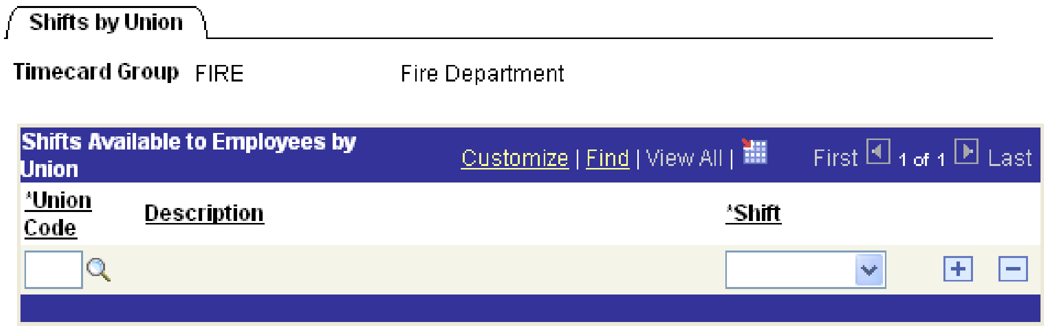
Short Description:
analyst

*Hourly Rate: $50.000000
*Allocation Type: Employee

Last Updated Date-Time Stamp: 07/18/06 4:38:23.000000PM
Last Updated User Name: BELK2195

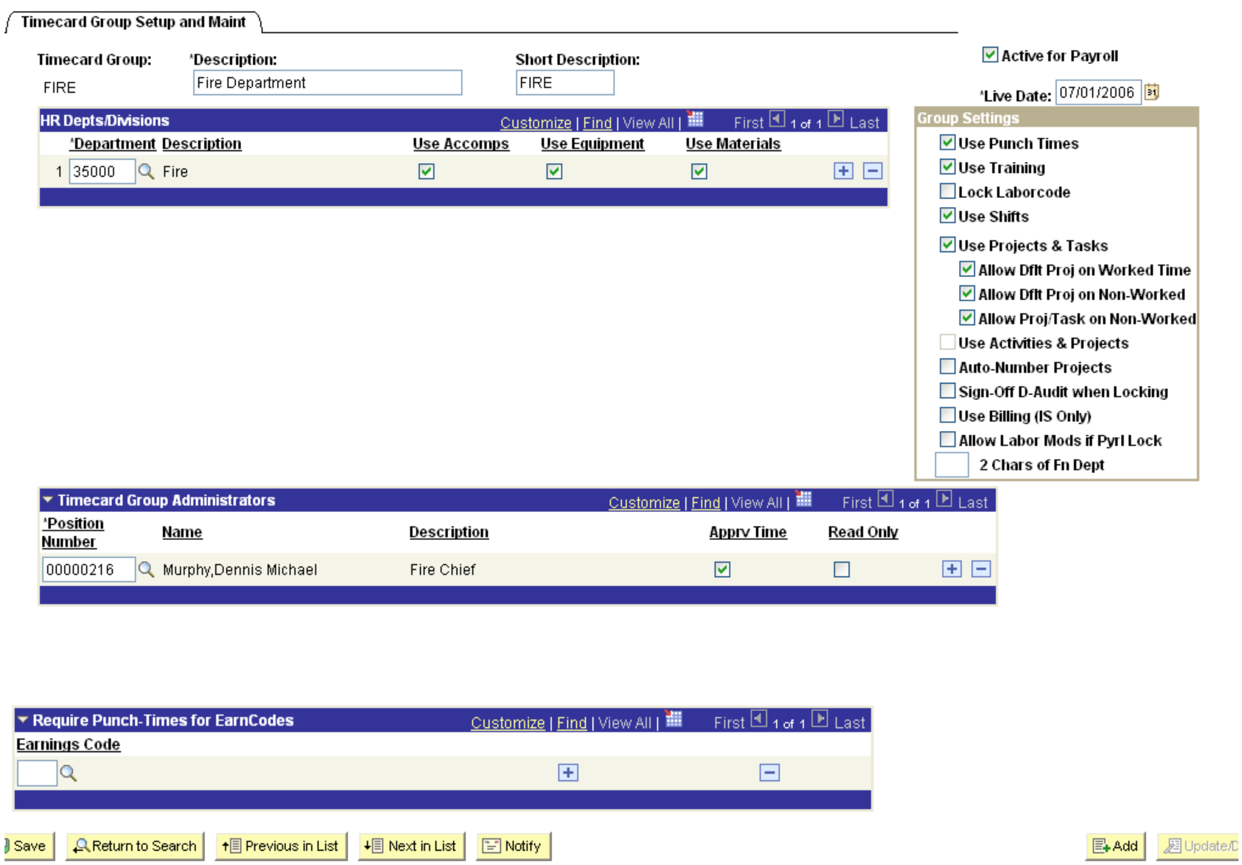
Shifts – By Union

shifts



Timecard Group Settings

Tc group settings



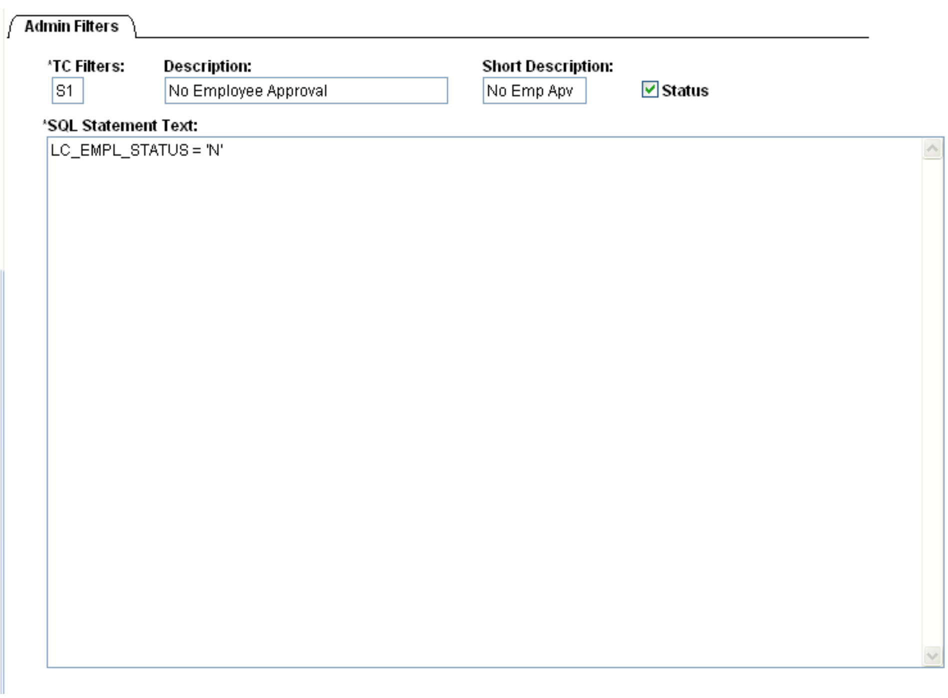
TC Admin Filters

There are several Timecard Admin Filters. These are used to select (filter) only specific records for a timecard group. The filters are used in the Administer Timecard page. Currently the filter that are there are:

TC Filters	Status	Description
PX	Active	Payroll Exception Filter
S1	Active	No Employee Approval
S2	Active	No Supervisor Approval
S3	Active	No Department Audit Approval
S4	Active	No Department Approval
S5	Active	No Payroll Approval
W1	Active	Week 1 Timecards
W2	Active	Week 2 Timecards

1. S1 – No Employee Approval – LC_EMPL_STATUS = ‘N’
2. S2 – No Supervisor Approval – LC_SUPV_STATUS = 'N'
3. S3 – No Department Audit Approval – LC_DAUD_STATUS = 'N'
4. S4 – No Department Approval – LC_DEPT_STATUS = 'N'
5. S5 – No Payroll Approval – LC_PYRL_STATUS = 'N'
6. W1 – Week One Timecards - LC_WEEKNO = '1'
7. W2 – Week Two Timecards - LC_WEEKNO = '2'
8. PX – Payroll Exception Filter – All Other Exceptions that need to be identified

The Admin Filters will be created by the IT Team. It is part of a sql statement that is used in peoplecode when selecting records in Administer Timecards.


Admin Filters

*TC Filters: S1

Description: No Employee Approval

Short Description: No Emp Apv

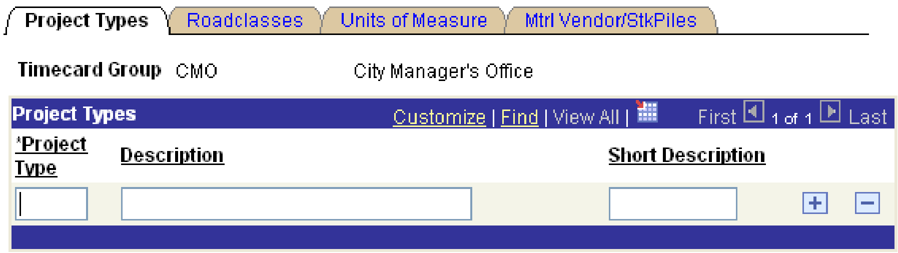
Status

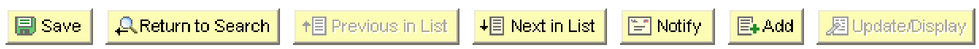
*SQL Statement Text:

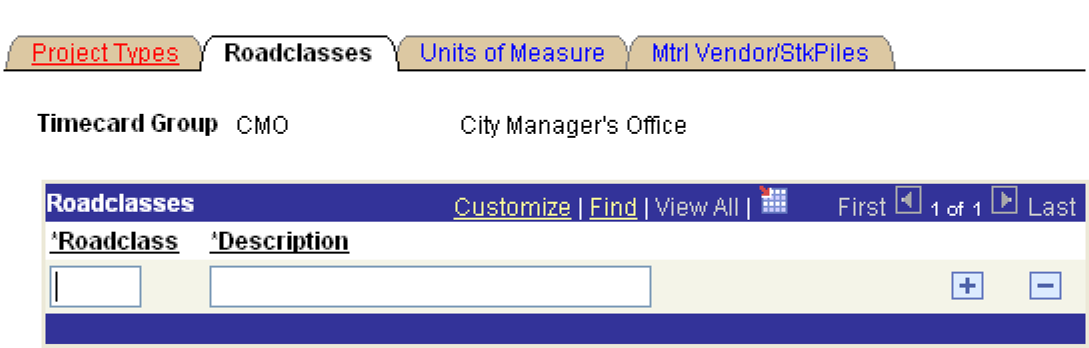
LC_EMPL_STATUS = 'N'

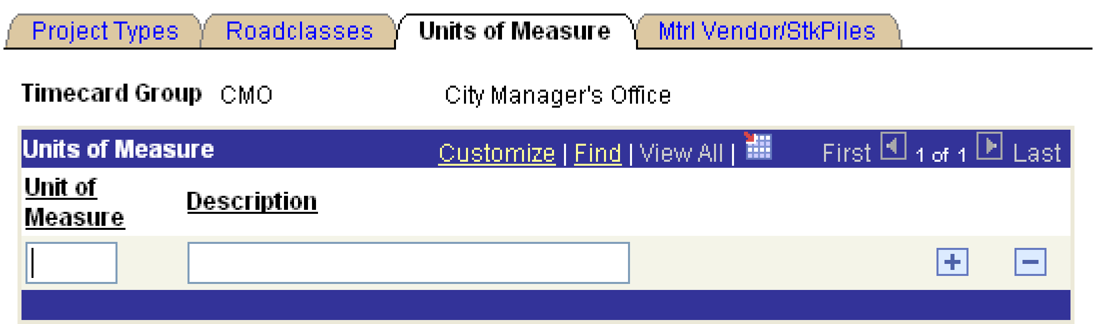
TC Group Lookups

Group lookup


Project Types
Roadclasses
Units of Measure
Mtrl Vendor/StkPiles
Timecard Group CMO City Manager's Office
Project Types
Customize | Find | View All |
First 1 of 1 Last
*Project Type
Description
Short Description

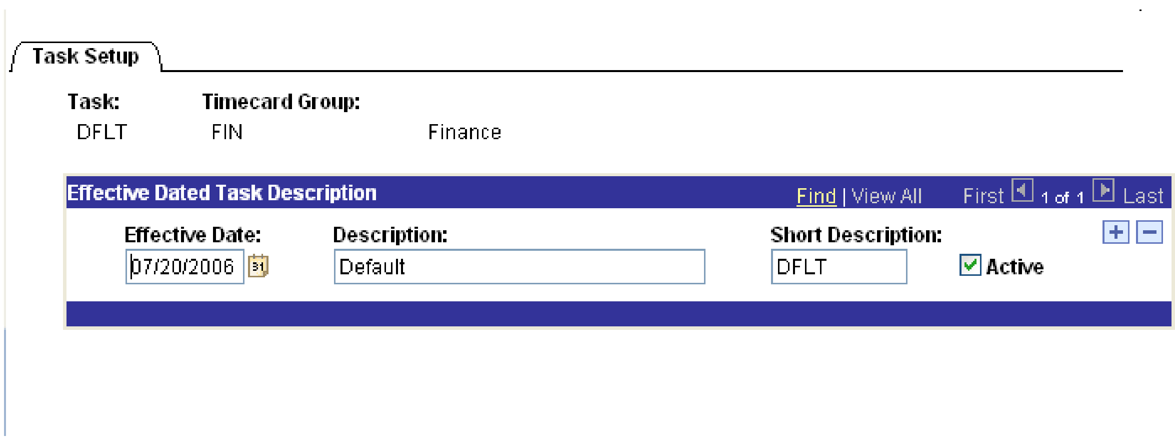

Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display


Project Types
Roadclasses
Units of Measure
Mtrl Vendor/StkPiles
Timecard Group CMO City Manager's Office
Roadclasses
Customize | Find | View All |
First 1 of 1 Last
*Roadclass
*Description


Project Types
Roadclasses
Units of Measure
Mtrl Vendor/StkPiles
Timecard Group CMO City Manager's Office
Units of Measure
Customize | Find | View All |
First 1 of 1 Last
Unit of Measure
Description

Tasks

tasks



Unit of Measure

Unit of measure

Dynamic Reporting

HTML Report Definitions

This is a description field that is automatically populated upon entering in the Labor Code, Project, Task, etc. This field is used at Lane County for public works activity codes for cost accounting. We will probably never use it.

TC Dynamic Reporting

This is a description field that is automatically populated upon entering in the Labor Code, Project, Task, etc. This field is used at Lane County for public works activity codes for cost accounting. We will probably never use it.

Time Entry

User Procedures

Employee

- Access timecard information using the browser, Springboard or PeopleSoft HR.
- Enter and maintain timecard information regularly to department requirements.
- Electronically sign off on timecard weekly for submission to Supervisor.

Supervisor

- Performs all duties as an employee AND the following responsibilities.
- Accesses timecard information for subordinates and verifies time.
- Electronically signs off on timecards for crew and submits to Dept Audit person

Department Audit

- Performs all duties as an employee AND the following responsibilities.
- Accesses timecard information for department inside PeopleSoft HR and reviews all time.
- Makes any adjustments and changes necessary.
- Electronically signs off on timecard information for the department-audit and submits to department head.

Department Head

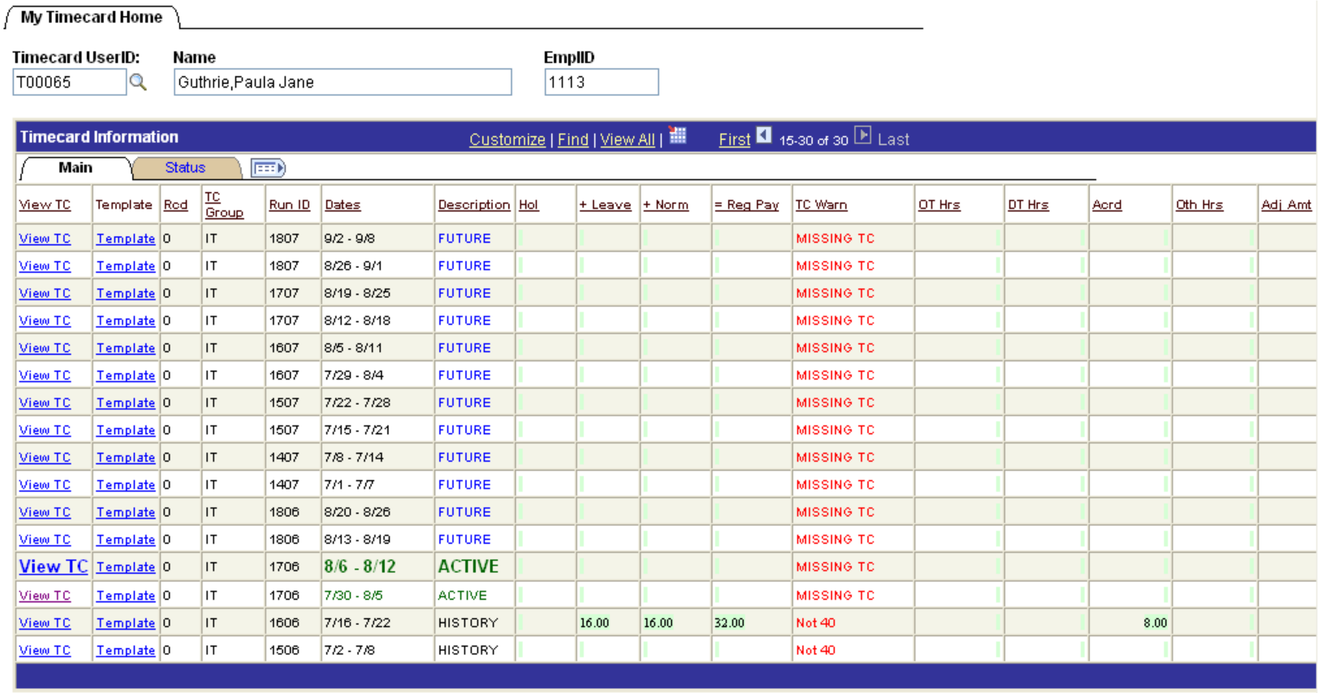
- Performs all duties as an employee AND the following responsibilities.
- Accesses timecard information for department inside PeopleSoft HR and reviews all time.
- Electronically submits Department Head Approval

Payroll

- Accesses Springfield timecard information using PeopleSoft HR
- Audits, adjusts and processes time for the city.
- Electronically completes all high level Timecard adjustments for the pay period and transfers information to PeopleSoft Payroll for final processing.

My Timecard Home

My timecard home



My Timecard Home

Timecard UserID: T00065 | Name: Guthrie,Paula Jane | EmplID: 1113

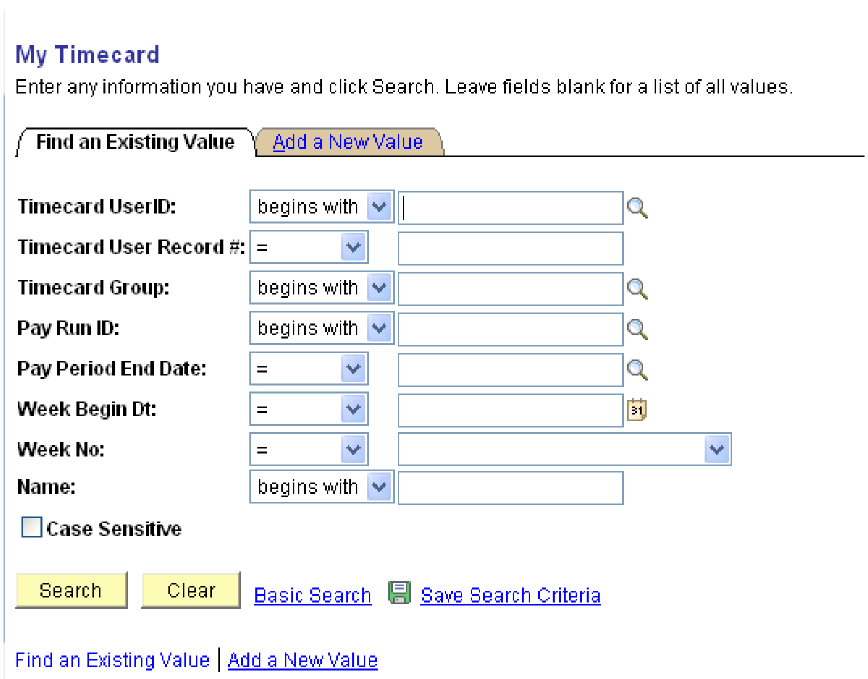
Timecard Information Customize | Find | View All | First 15-30 of 30 Last

Main | Status

View TC	Template	Rcd	TC Group	Run ID	Dates	Description	Hol	+ Leave	+ Norm	= Reg Pay	TC Warn	OT Hrs	DT Hrs	Acrd	Oth Hrs	Adj Amt
View TC	Template	0	IT	1807	9/2 - 9/8	FUTURE					MISSING TC					
View TC	Template	0	IT	1807	8/26 - 9/1	FUTURE					MISSING TC					
View TC	Template	0	IT	1707	8/19 - 8/25	FUTURE					MISSING TC					
View TC	Template	0	IT	1707	8/12 - 8/18	FUTURE					MISSING TC					
View TC	Template	0	IT	1607	8/5 - 8/11	FUTURE					MISSING TC					
View TC	Template	0	IT	1607	7/29 - 8/4	FUTURE					MISSING TC					
View TC	Template	0	IT	1507	7/22 - 7/28	FUTURE					MISSING TC					
View TC	Template	0	IT	1507	7/15 - 7/21	FUTURE					MISSING TC					
View TC	Template	0	IT	1407	7/8 - 7/14	FUTURE					MISSING TC					
View TC	Template	0	IT	1407	7/1 - 7/7	FUTURE					MISSING TC					
View TC	Template	0	IT	1806	8/20 - 8/26	FUTURE					MISSING TC					
View TC	Template	0	IT	1806	8/13 - 8/19	FUTURE					MISSING TC					
View TC	Template	0	IT	1706	8/6 - 8/12	ACTIVE					MISSING TC					
View TC	Template	0	IT	1706	7/30 - 8/5	ACTIVE					MISSING TC					
View TC	Template	0	IT	1606	7/16 - 7/22	HISTORY		16.00	16.00	32.00	Not 40			8.00		
View TC	Template	0	IT	1506	7/2 - 7/8	HISTORY					Not 40					

My Timecard

My timecard.



My Timecard

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Timecard UserID: begins with

Timecard User Record #: =

Timecard Group: begins with

Pay Run ID: begins with

Pay Period End Date: =

Week Begin Dt: =

Week No: =

Name: begins with

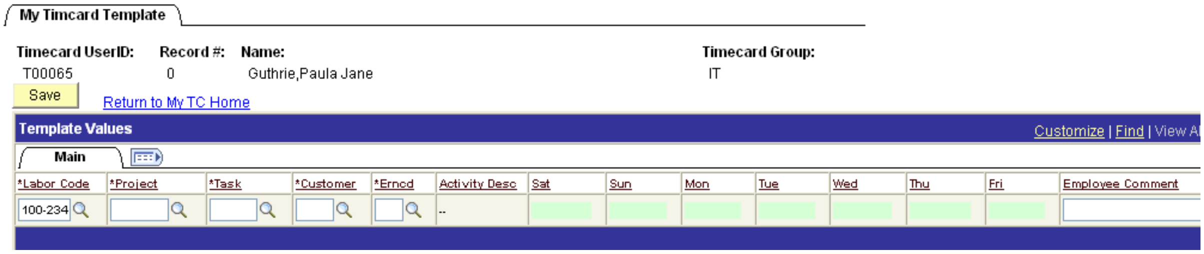
Case Sensitive

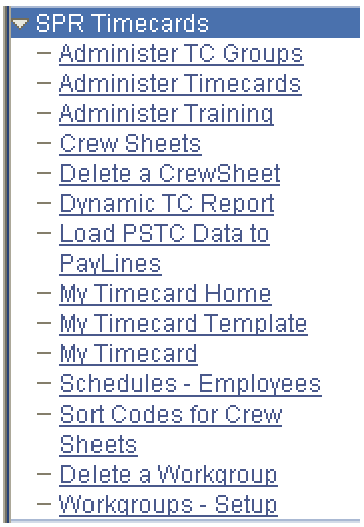
Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

My Timecard Template

My timecard template

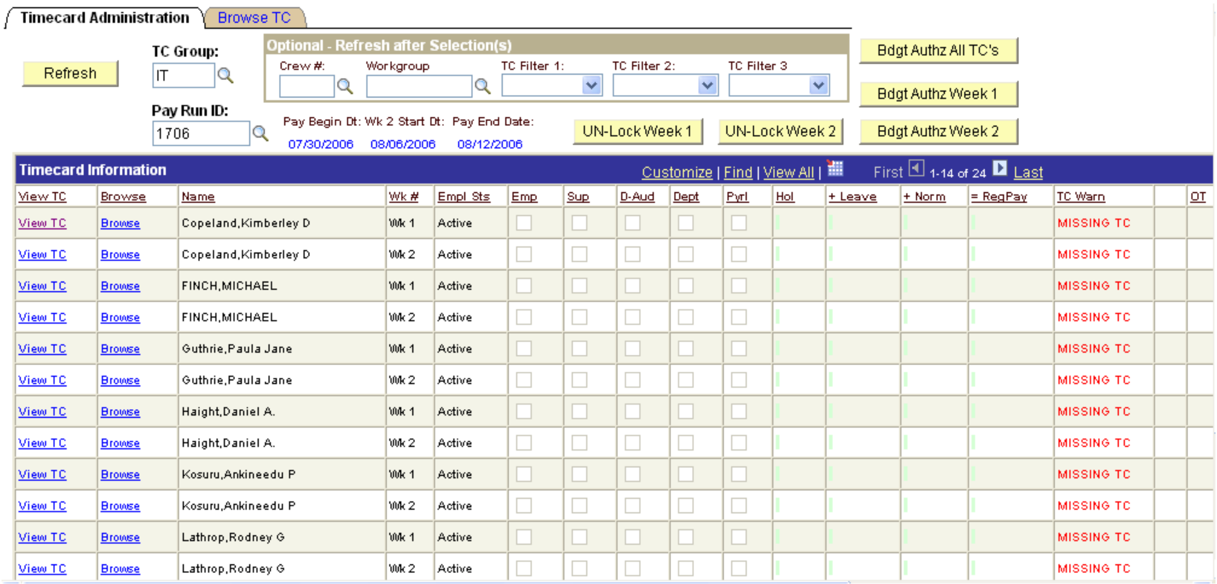

My Timcard Template
Timecard UserID:
Record #:
Name:
Timecard Group:
T00065
0
Guthrie,Paula Jane
IT
Save
Return to My TC Home
Template Values
Customize | Find | View A
Main
*Labor Code
*Project
*Task
*Customer
*Erncd
Activity Desc
Sat
Sun
Mon
Tue
Wed
Thu
Fri
Employee Comment
100-234


SPR Timecards
Administer TC Groups
Administer Timecards
Administer Training
Crew Sheets
Delete a CrewSheet
Dynamic TC Report
Load PSTC Data to PayLines
My Timecard Home
My Timecard Template
My Timecard
Schedules - Employees
Sort Codes for Crew Sheets
Delete a Workgroup
Workgroups - Setup

Timecard Administration

Administer Timecards

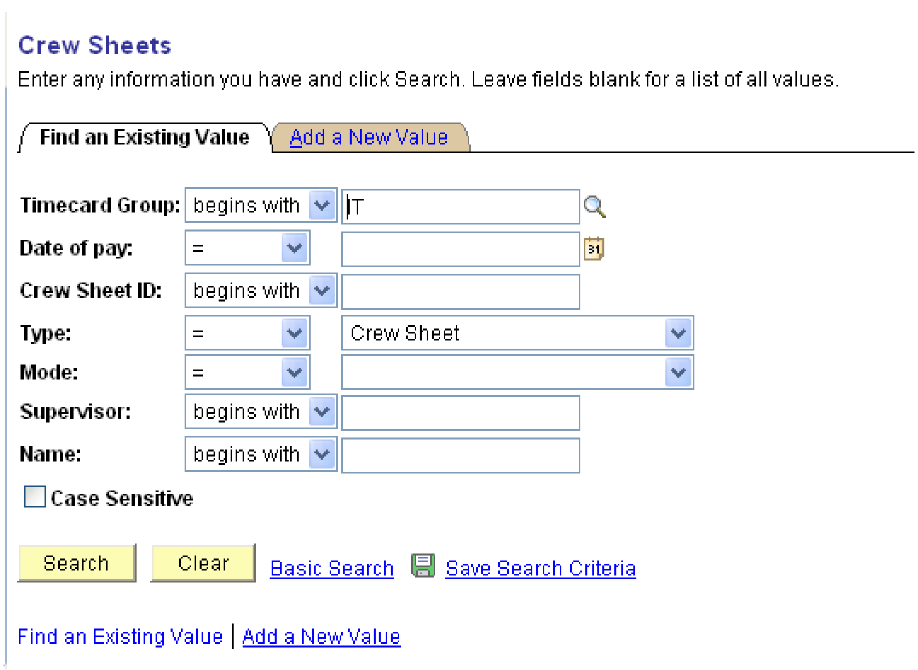
Administer timecards



View TC	Browse	Name	Wk #	Empl Sts	Emp	Sup	D-Aud	Dept	Pyrl	Hol	+ Leave	+ Norm	= RegPay	TC Warn		OT
View TC	Browse	Copeland,Kimberley D	Wk 1	Active										MISSING TC		
View TC	Browse	Copeland,Kimberley D	Wk 2	Active										MISSING TC		
View TC	Browse	FINCH,MICHAEL	Wk 1	Active										MISSING TC		
View TC	Browse	FINCH,MICHAEL	Wk 2	Active										MISSING TC		
View TC	Browse	Guthrie,Paula Jane	Wk 1	Active										MISSING TC		
View TC	Browse	Guthrie,Paula Jane	Wk 2	Active										MISSING TC		
View TC	Browse	Haight,Daniel A.	Wk 1	Active										MISSING TC		
View TC	Browse	Haight,Daniel A.	Wk 2	Active										MISSING TC		
View TC	Browse	Kosuru,Ankineedu P	Wk 1	Active										MISSING TC		
View TC	Browse	Kosuru,Ankineedu P	Wk 2	Active										MISSING TC		
View TC	Browse	Lathrop,Rodney G	Wk 1	Active										MISSING TC		
View TC	Browse	Lathrop,Rodney G	Wk 2	Active										MISSING TC		

Crew Sheets

Crew sheets



Crew-Sheet | Punches / OT | Training | Emp Hour Check

TC Group: IT   CS ID 160610720N002
Supv Oprid TCMAN   Type Crew Sheet
Pay Dt 07/20/2006 Thursday
Weather
Comments

Mode: Draft / Synch

Save

Append Options: Copy Sel | Delete Sel | Dup Eqp | Dup Labor | Dup Name | Template | Workgroup | Crew | Use Sched | Append | Undo Append

Append Values: LbrCode | Erncd | Project | Hours

Sort Cd   Show Act/Proj   Save as Template

Crew Sheet Entries   Customize | Find | View All | First 1-9 of 9 Last

Main | Accomps | Comments | Error Info

		Name	Rec	Labor Code	Project	Task	Cust	Hrs	Rt Adj	Erncd	>>
	E	FINCH,MICHAEL	0	NEW CD	DFLT	DFLT	DFLT	2.00		REG	>>
	E	FINCH,MICHAEL	0	IT	HELP ME	DFLT	DFLT	2.00		REG	>>
		FINCH,MICHAEL	0	IT	DFLT	DFLT	DFLT	4.00		REG	>>
	E	Guthrie,Paula Jane	0	PSOFT	HELP ME	DFLT	DFLT	2.00		REG	>>
		Guthrie,Paula Jane	0	PSOFT	DFLT	DFLT	DFLT	4.00		REG	>>
	E	Guthrie,Paula Jane	0	NEW CD	DFLT	DFLT	DFLT	2.00		REG	>>
	E	Miller,Kerrie E	0	NEW CD	DFLT	DFLT	DFLT	2.00		REG	>>
		Miller,Kerrie E	0	IT	DFLT	DFLT	DFLT	4.00		REG	>>
	E	Miller,Kerrie E	0	IT	HELP ME	DFLT	DFLT	2.00		REG	>>

Save | Return to Search | Notify   Add | Update/Display

Crew-Sheet | Punches / OT | Training | Emp Hour Check

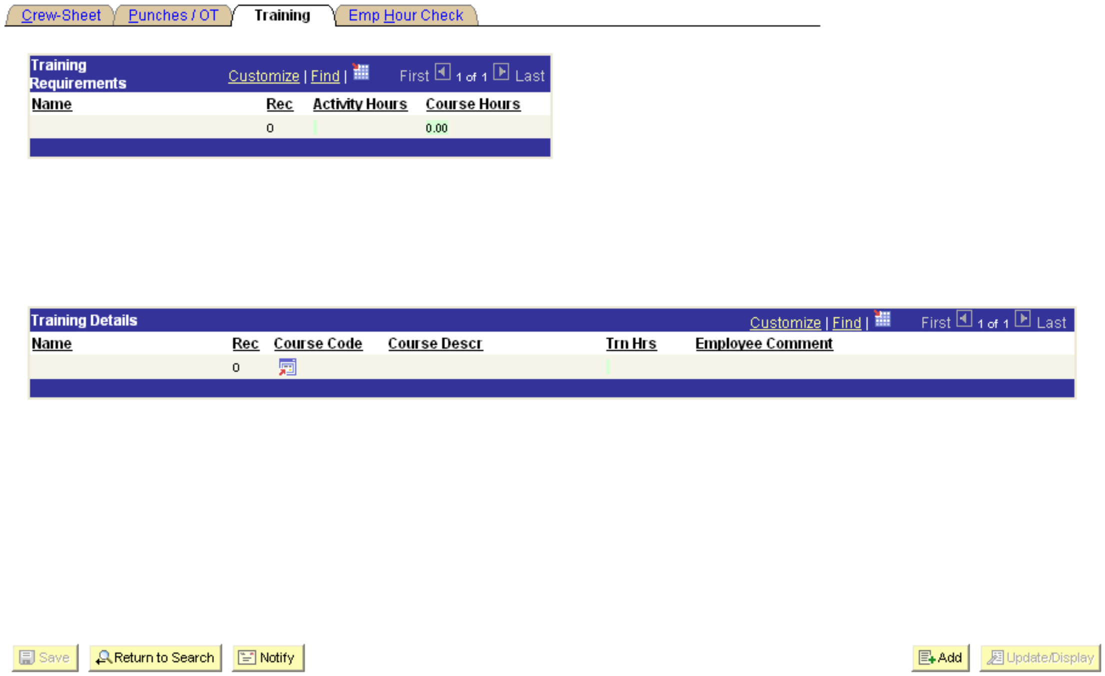
Punches Required For   Customize | Find | First 1-3 of 3 Last

Name	Rec	Erncd	TC Hrs	Punch/OT Hrs
Guthrie,Paula Jane	0	REG	8.00	8.00
Miller,Kerrie E	0	REG	8.00	8.00
FINCH,MICHAEL	0	REG	8.00	8.00

Punch Time Information   Customize | Find | First 1-3 of 3 Last

Name	Rec	Erncd	Start Time	Period End Time	Unpaid (Break) hrs	Extra / Pd Lunch Hrs	Ttl Hrs	Comment
FINCH,MICHAEL	0	REG	9:00AM	5:00PM			8.00	worked hard
Guthrie,Paula Jane	0	REG	9:00AM	5:00PM			8.00	worked hard
Miller,Kerrie E	0	REG	9:00AM	5:00PM			8.00	worked hard

Save | Return to Search | Notify   Add | Update/Display


Crew-Sheet | Punches / OT | Training | Emp Hour Check

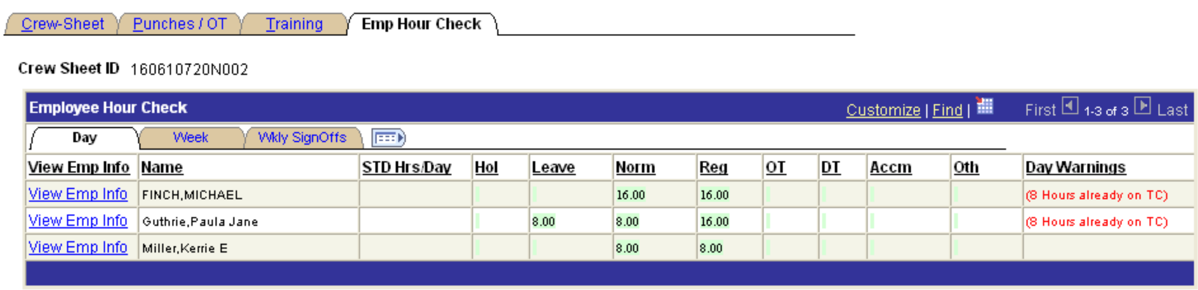
Training Requirements — Customize | Find | First 1 of 1 Last

Name	Rec	Activity Hours	Course Hours
	0		0.00

Training Details — Customize | Find | First 1 of 1 Last

Name	Rec	Course Code	Course Descr	Trn Hrs	Employee Comment
	0				

Save | Return to Search | Notify | Add | Update/Display


Crew-Sheet | Punches / OT | Training | Emp Hour Check

Crew Sheet ID 160610720N002

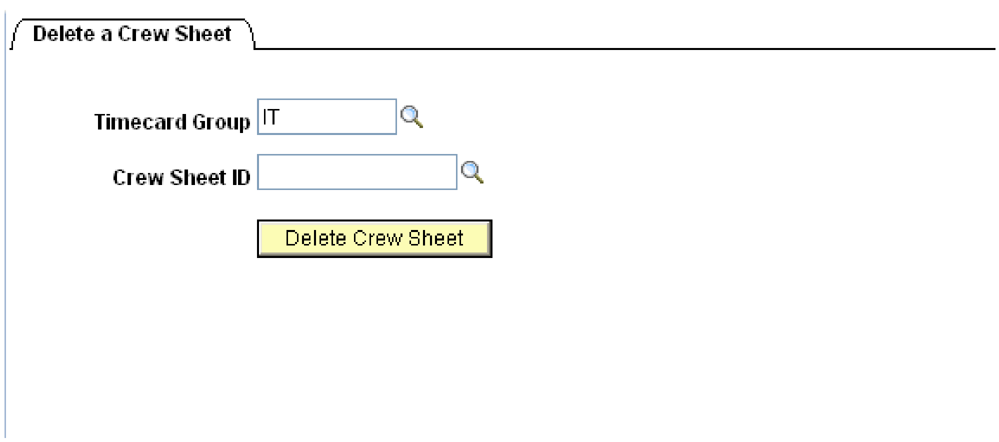
Employee Hour Check — Customize | Find | First 1-3 of 3 Last

Day | Week | Wkly SignOffs

View Emp Info	Name	STD Hrs/Day	Hol	Leave	Norm	Reg	OT	DT	Accm	Oth	Day Warnings
View Emp Info	FINCH,MICHAEL				16.00	16.00					(8 Hours already on TC)
View Emp Info	Guthrie,Paula Jane			8.00	8.00	16.00					(8 Hours already on TC)
View Emp Info	Miller,Kerrie E				8.00	8.00					

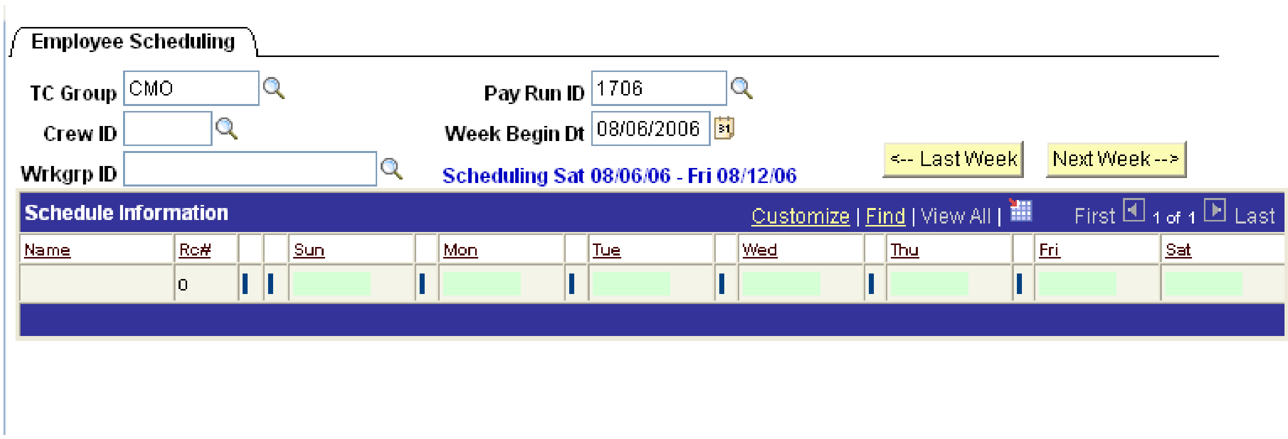
Delete a Crew Sheet

Delete crew sheet



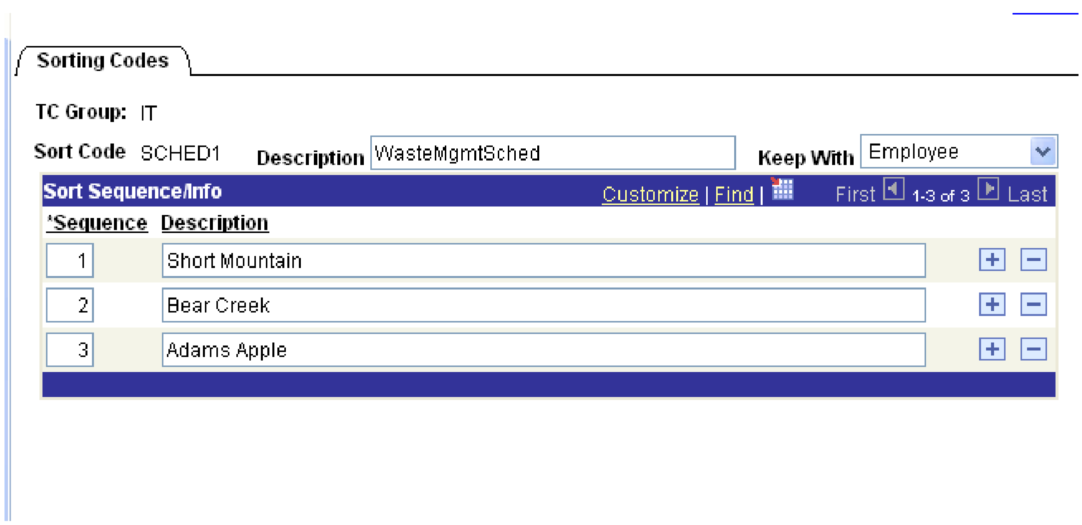
Schedules - Employees

Schedules



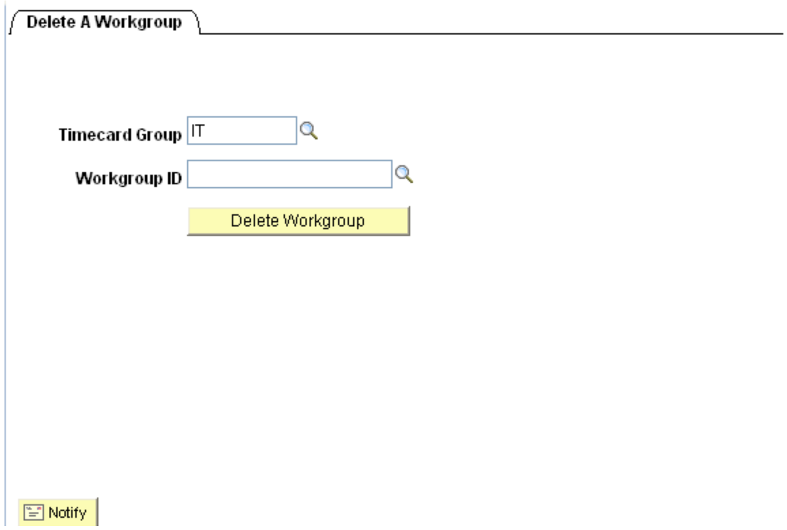
Sort Codes for Crew Sheets

Sort codes



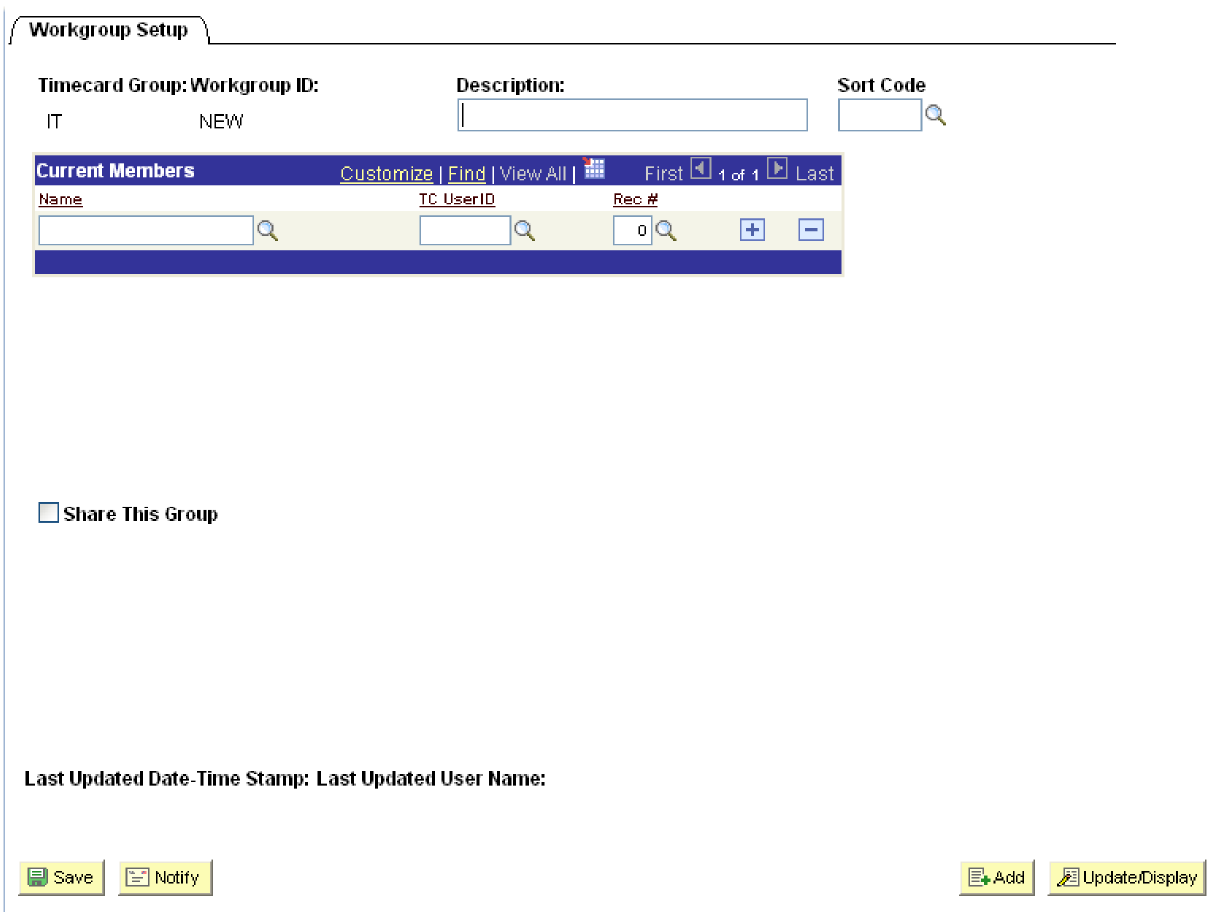
Delete a Workgroup

Delete workgroup



Workgroups - Setup

Setup workgroup

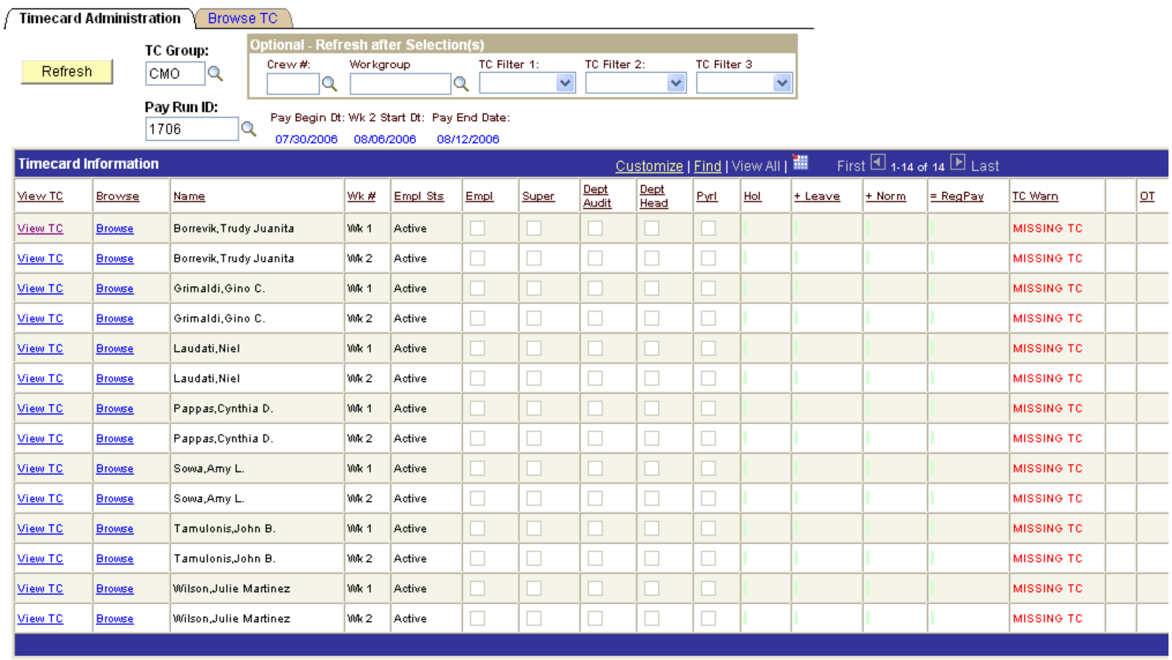


Timecard Approval

Administer Timecards

The Administer Timecards page is used by Supervisors, Department Auditors and Department Heads to approve the group of employee timecards that they are assigned to.

Using the left-hand navigation, access the "Administer Timecards" link.



View TC	Browse	Name	Wk #	Empl Sts	Empl	Super	Dept Audit	Dept Head	Pyrl	Hol	+ Leave	+ Norm	= RegPay	TC Warn		OT
View TC	Browse	Borrevik,Trudy Juanita	Wk 1	Active										MISSING TC		
View TC	Browse	Borrevik,Trudy Juanita	Wk 2	Active										MISSING TC		
View TC	Browse	Grimaldi,Gino C.	Wk 1	Active										MISSING TC		
View TC	Browse	Grimaldi,Gino C.	Wk 2	Active										MISSING TC		
View TC	Browse	Laudati,Niel	Wk 1	Active										MISSING TC		
View TC	Browse	Laudati,Niel	Wk 2	Active										MISSING TC		
View TC	Browse	Pappas,Cynthia D.	Wk 1	Active										MISSING TC		
View TC	Browse	Pappas,Cynthia D.	Wk 2	Active										MISSING TC		
View TC	Browse	Sowa,Amy L.	Wk 1	Active										MISSING TC		
View TC	Browse	Sowa,Amy L.	Wk 2	Active										MISSING TC		
View TC	Browse	Tamulonis,John B.	Wk 1	Active										MISSING TC		
View TC	Browse	Tamulonis,John B.	Wk 2	Active										MISSING TC		
View TC	Browse	Wilson,Julie Martinez	Wk 1	Active										MISSING TC		
View TC	Browse	Wilson,Julie Martinez	Wk 2	Active										MISSING TC		

Screen Control

Timecard Group

Enter the Timecard Group you wish to view timecards for (This defaults to your home group, and most people will only have access to one group).

Crew Number

Press the prompt button to select the crew you wish to administer. As a supervisor, you will only have access to your primary crew, or crews you have been selected as back-up for. This defaults to blank.

Pay Run ID

Use the prompt to select the pay-run you wish to administer. This defaults to the Active period. The only time you would select a Run-Id other than the active is in the brief window where the previous run is Still Processing and the new Run-Id has started.

Lock Week1/2 Buttons

These buttons will only be available for Department administrators, and are used to prevent new timecard creation and timecard updates for each week if desired by the department.

Timecard Information Columns

View TC

You can access any of crew’s timecards by selecting the “View TC” link next to the person/week you wish to see.

Browse

This activates the “Browse TC” Tab and brings up the employee you select from the list. The “Browse TC” page is discussed later in this document.

Name
Employee Name

Wk #
Timecards are completed on a weekly basis. Run-ID's are a 2-week period. Week # indicates which week (1 or 2) the given timecard is for in the given Run-ID.

Empl Sts
The Employee Status column displays the status the HR has entered for the employee. Typically, this should be "Active". However, if an employee is on leave, recently terminated or other, this status may reflect those situations.

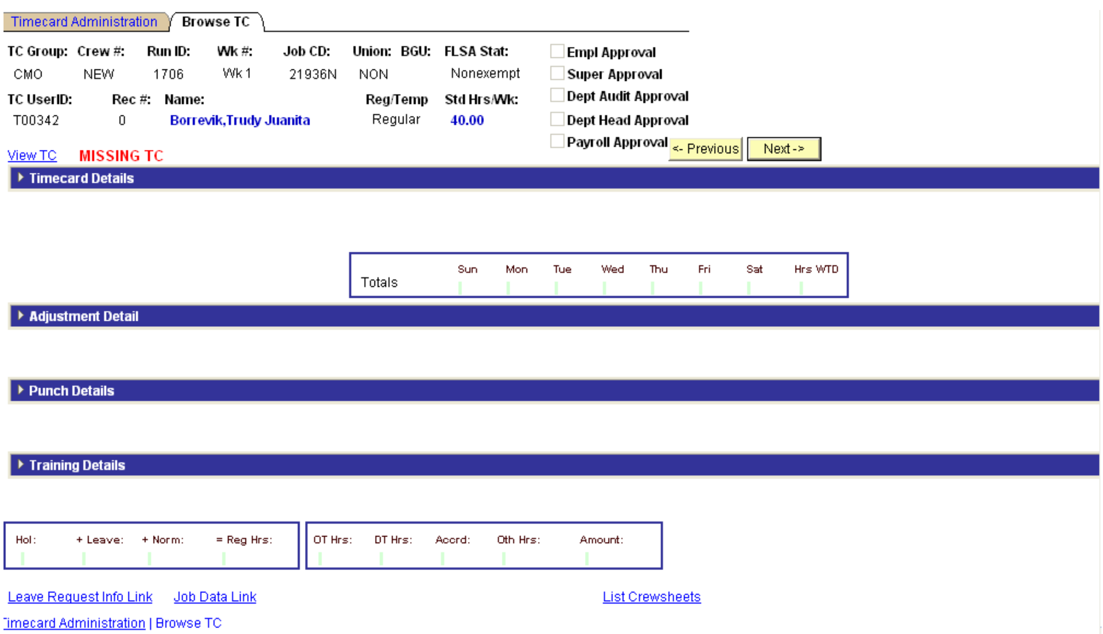
Empl-Pyrl Checkboxes
These checkboxes indicate who in the process has signed off on the timecards.

Hours Columns.
The Timecard Home page will display hours in each of the categories seen. (Holiday, Leave, Regular, Overtime, Double-time, Accumulated Hours (Comp Time), Other Hours, and finally Adjustment amounts).

TC Warn
This red indicator will alert you if the employee is Missing a timecard, or has entered regular hours <> 40. The "Not 40" warning can be ignored if they do not typically work 40 hours, or if that week they truly had an exception.

Other Info
This column may have warnings if the employee's current profile is out of synch with HR Data, or they are a contractor and not being paid through Payroll, or other important information about the employee.

Browse TC



General Information
You can use the "Browse TC" page in the Timecard Administration area to review and approve your Employee's time. This feature allows quick access to view the timecards, however you cannot modify any employee time here. If you need to perform an operation on an employee's timecard other than approving it, you must use the "View TC"

link to activate the employee's timecard. From there, you can make any changes that may be necessary before approving the employee's time.

Approval Checkboxes
If you are a supervisor, check the "Super Approval" for the employee timecard if you approve the time as entered. If you are the Department Audit, check the "Dept Audit Approval."

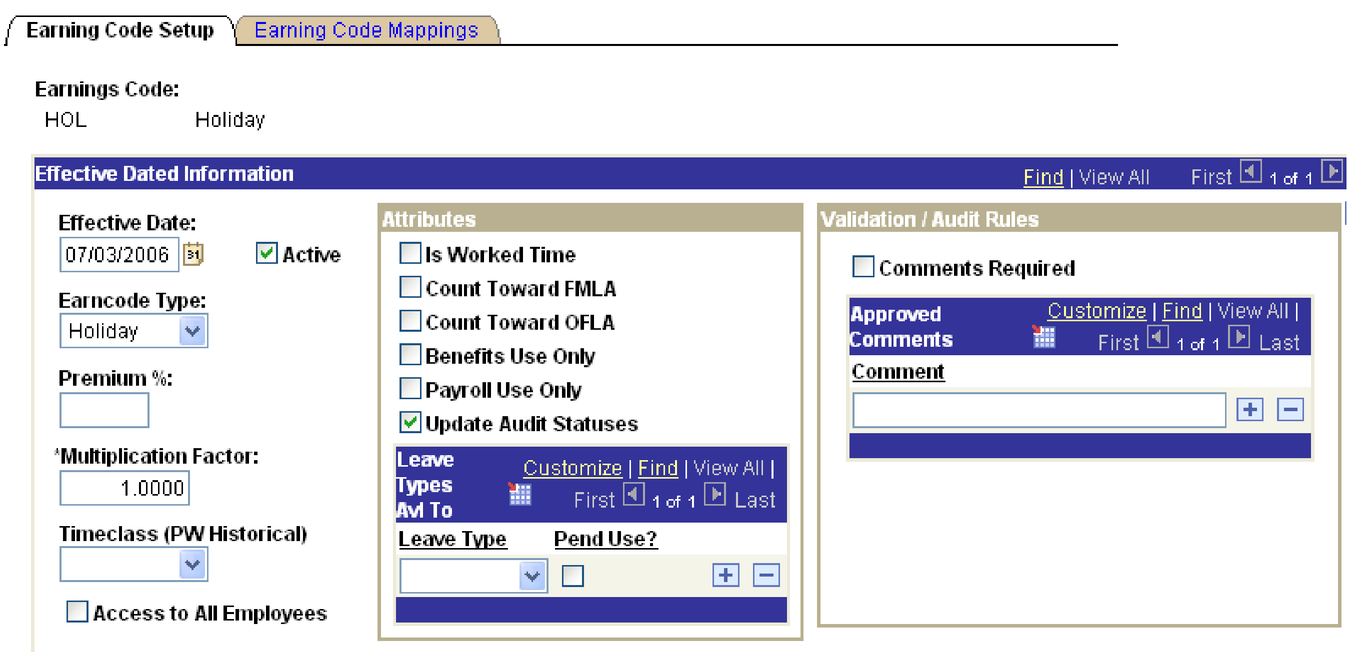
Navigation Buttons
Use the "Previous" and "Next" buttons to scroll through the timecards you have actively showing on the "Timecard Administration" page.

Timecard – Payroll

Earning Codes (Payroll Setup)

The "Earnings Codes Extensions" component performs 3 major functions. Through the "Earning Code Setup" page, it allows payroll to assign attributes to Earning Codes that provide for some validation during use by employees or report and lookup filtering and it allows Earning Codes to be assigned to different leave types. The "Earning Code Mappings" page serves as a mechanism to give or deny access to Earning Codes to the Timecard Groups or unions.

<u>Earning Code Setup</u>



1. **Earncode Type:** This drop-down allows you to setup an Earning Code as "Holiday", "Regular", "Leave", "Holiday", "Overtime", "Double-time", "Accrue" or "Other".
   - *Holiday* – Places hours earned into the "Hol" bucket on the admin screen and is added to Leave and Reg. to count towards the weekly 40 for warn-checking. ALSO, this selection requires

timecard user to enter Holiday Date information for each day hours are applied to an earn-code with this type.

- *Leave* – Places hours earned in the "Leave" bucket on the admin screen and is added with Reg. hours counting towards the weekly 40 for warn-checking.
- *Regular* – Places hours earned into the "Regular" bucket on the admin screen and is added with Leave and Holiday to count towards the weekly 40 for warn-checking.
- *Overtime* – Places hours earned into the "OT" bucket on the admin screen.
- *Double-time* – Places hours earned into the "DT" bucket on the admin screen.
- *Accrue* – Used for comp-time types. Places hours earned into the "Accrd" bucket on the admin screen.
- *Other* – Used for on-call or other misc. hour types not fitting another bucket.

2. **Premium %:** This field is required for "Premium Pay" type earning codes. No-where else in the system is the percent-over-base rate captured, so to pay a person correctly, this field needs to be entered for premium-pays such as L10, etc.
3. **Accessible by All (Checkbox) –** This will grant immediate access to the given earn-code to all employee timecards.

4. **Attributes Checkboxes**
   - **Is Worked Time –** Check this box for earning-codes that are "Worked" hours.
   - **Count toward FMLA –** Check if the earn-code counts toward FMLA.
   - **Count toward OFLA –** Check if the earn-code counts toward OFLA.
   - **Benefits Use Only –** Check if only benefits should be using it (78, etc).
   - **Payroll Use Only –** Allows payroll person to enter the earn-code on the timecard, but no-one else. (Use in conjunction with the "Accessible by All" checkbox.

5. **Leave Types Avl To** - Add entries here for each "Leave Type" that should have access to a given earn-code. This is used as a lookup by the LC Leave and soon-to-come Leave Request functionality to limit which earn-codes can be used in a given editor.

6. **Validation / Audit Rules Checkboxes**
   - **Comments Required –** Check this box to require the user to select from the list of comments. (You must supply a list of approved comments when checking this!)

7. **Approved Comments** - Add entries here to provide the Timecard User with options for comments. For "Comment Required" type earn-codes, you MUST specify valid comments as the Timecard User will be limited to only entering the approved comments you enter here.

<u>Earning Code Mappings</u>

1. **Give Earncode to employees Having**- Add entries for each Union, FLSA Status and/or Jobcode. Union is a required field but FLSA Status and Jobcode are optional.

2. **Associated TC Groups** - Add entries for each Timecard Group that should have access to the given Earning Code. From this point, the associated Timecard Group will have to assign the Earning Code out to employees for anyone to have access to use it.

Administer TC Groups

This page is used by Payroll to monitor the status of each active Timecard Group and prepare them for payroll processing. It can be given to the department auditor in read only to see what percentage has been entered and approved.

Payroll Administration

Pay Run ID: 1706

Pay Period End Date: 08/12/2006

Timecard Administration Link

Un-Confirm

Load Payroll Link

Timecard Group Status — Customize | Find | View 7 | First 1-10 of 10 Last

TC Group	Description	% Entered W1	% Sup W1	Dep % W1	% Entered W2	% Sup W2	Dep % W2	Payroll Status	Audited ?
CMO	City Manager's Office	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
COURT	Court	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
DSD	Development Services Dept.	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
FIN	Finance	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
FIRE	Fire Department	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
HR	Human Resources	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
IT	Information Technology	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
LIB	Library	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
POL	Police	0.00	0.00	0.00	0.00	0.00	0.00	In Process	
PW	Public Works Department	0.00	0.00	0.00	0.00	0.00	0.00	In Process	

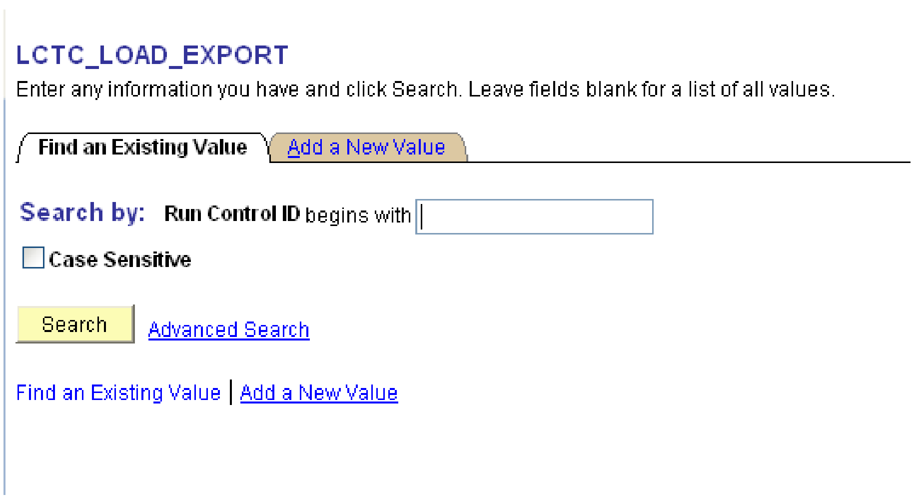
1. **TC Group** field is a list of the Departments and descriptions that were setup for timecards.
2. **% Entered W1** – This is the percent that has been entered for that department for week 1
3. **% Sup W1** – This is the percent that the supervisor has approved in week 1.
4. **Dep % W1** – This is the percent that the Department Head has approved in week 1.
5. **% Entered W2** – This is the percent that has been entered for that department for week 2
6. **% Sup W2** – This is the percent that the supervisor has approved in week 2.
7. **Dep % W2** – This is the percent that the Department Head has approved in week 2.
8. **Payroll Status** – The idea is that come Monday afternoon or Tuesday morning of the "Processing" week, payroll will come in and see the department 100% signed off for both weeks. They can then press the "Lock Payroll" button to lock the group down from further entry (on the dept's part anyway). They will then use the "Administer Timecards" page in payroll to audit each group. Once they are done auditing, they can optionally use the "Audited" checkbox to mark the group as audited. Then they continue down the list. When they are completed done auditing and are ready to load pay-lines, then press the "Confirm all Timecards" button to fully lock down timecards, even from payroll. Then they load payroll. (They CAN "Un-Confirm" with that button, as the label will change to "Un-confirm all timecards" when they press it.)
9. **Lock Group** - Used the "Lock Group" button to lock each group individually for payroll processing. When a TC Group is locked, Payroll can access and update timecard records, but no-one else can modify any records. When you click the button (it is expecting the pay-run to be in "Processing" period to work properly) it will change from "Lock Group" to "Un-Lock Group". The group can be unlocked it if hasn't bee processed yet.
10. **Audited?** – If there is another group that checks to make sure that the timecards are all correct, they can go in here and check the audited box to show that they have audited that department. Could be used for the department admin person.

11. **Confirm All Timecards Button –** Use the “Confirm All Timecards” button to lock all timecards for import into payroll. This will make all timecards view-only to everyone. Once you have confirmed the timecards, you can Unconfirm All Timecards if you need to make changes. This button is available when the pay period is in processing mode. When it is still in active or future mode then the button will be grayed out.
12. **Timecard Administration Link –** Use the “Timecard Administration Link” to bring up the Administer Timecards page in a separate window. This will allow Payroll the ability to reach individual timecards in an orderly fashion. When it is still in active or future mode then the link will not be available. It is only when it is in processing mode that the link is available.
13. **Load Payroll Link -** Use the “Load Payroll Link” to access the application engine process that loads payroll from the timecard data. When it is still in active or future mode then the link will not be available. It is only when it is in processing mode that the link is available.

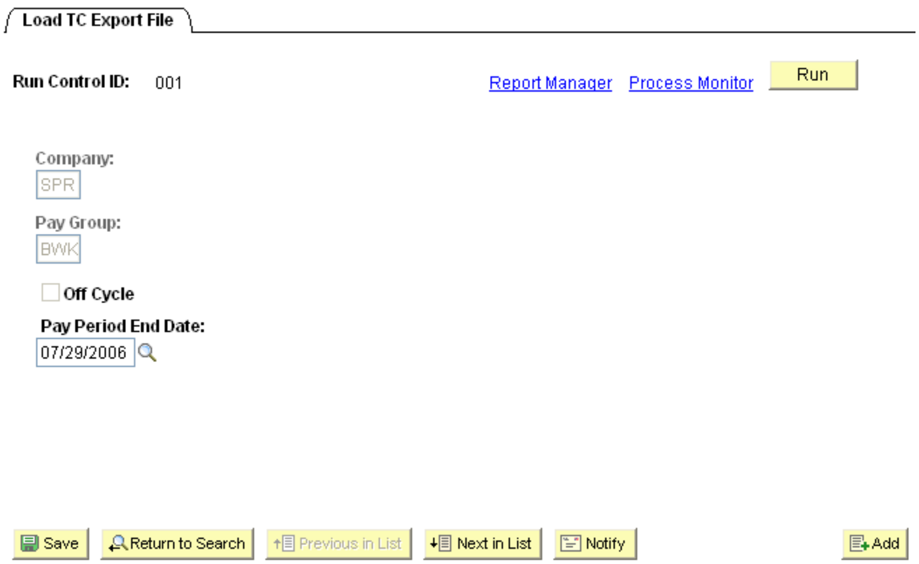
Load PSTC Data to Paysheets

This is the process that takes the approved and audited timecards from the TC system to paysheets. It is an application engine program. It loads into PAY_PAGE, PAY_LINES, PAY_EARNINGS, and PAY_OTH_EARNS tables.

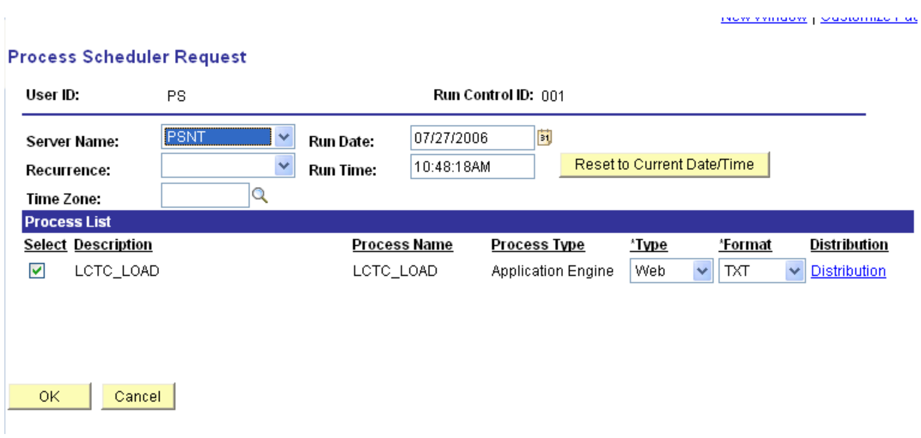
6. Navigate to SPR Timecards > Load PSTC Data to Paysheets
7. Enter in the run control



8. It will automatically fill in the company of SPR and the pay group of BWK.
9. Enter in the Pay Period End Date for the timecards that you are loading to paysheets.



10. Run the process LCTC_LOAD app engine.
11. It will then load the paysheets for every employee with a timecard.



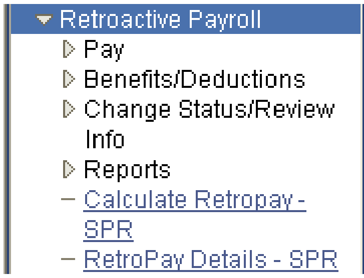
What does the load do?

1. It mines PSOPRDEFN and JOB_DATA for new users to create.
2. It creates a new PS_LCTC_PRFL record for the new users found
3. It creates PS_LCTC_PRFL_DATA (child) records for the new PS_LCTC_PRFL records created.
4. For all existing users, it updates their associated LC_TMCD_GROUP setting effective-dated.
5. It clears PS_LCTC_PRFL_DATA records for any corresponding PS_JOB records that may have been deleted or corrected (rare).
6. It now goes through existing users and check for any new PS_JOB records that may have been added an synchs/adds them to PS_LCTC_PRFL_DATA. (The only exception is if they re-activate a termed employee, it will wait 20 days or so to re-term them if they never show up as active in PS_JOB. Our departments reactivate employees before HR here...) It also goes through here and links andy PS_LCTC_PRFL_DATA records added from the Dept side with PS_JOB (Updates the LC_JOB_EFFDT and LC_JOB_EMPL_RCD and LC_JOB_EFFSEQ fields)

7. Updates PS_LCTC_PRFL record to set OPRID to blank where there are duplicate OPRIDS (rare).
8. Updates PS_LCTC_PRFL to have OPRID set in PSOPRDEFN table if employee link is setup.
9. Updates PSOPRDEFN to have EMPLID if not already setup. (We here at LC setup PSoft accounts BEFORE they are employees, so this program uses a component interface to go back an update it after. You probably don't have this problem at Spfld)
10. Cleans Timecard Template of records that no longer correspond to valid Laborcodes, project, etc.
11. Deletes future timecards for employees that may have entered them "expecting" to stay employed, but them leave for some reason...
12. Refreshes scheduling tables.
13. Refreshes PS_LCTC_PAY_DATES tables.
14. Refreshes PS_LCTC_PERIOD_STS table.

RetroPay

Retro Pay

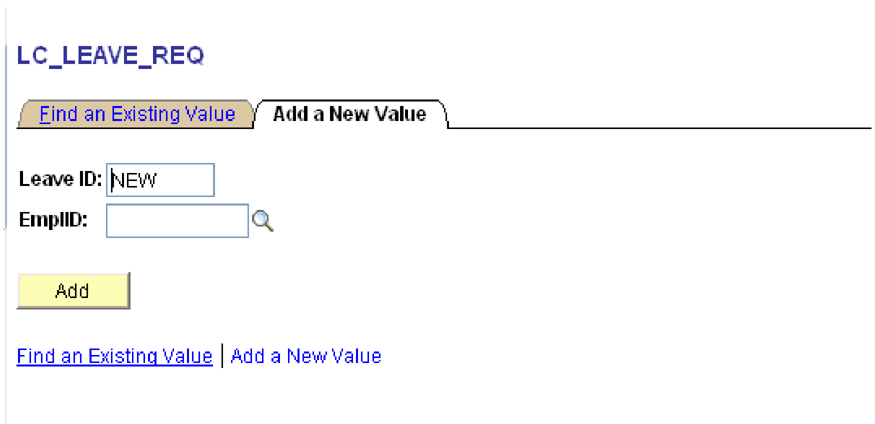


Leave Benefits Request

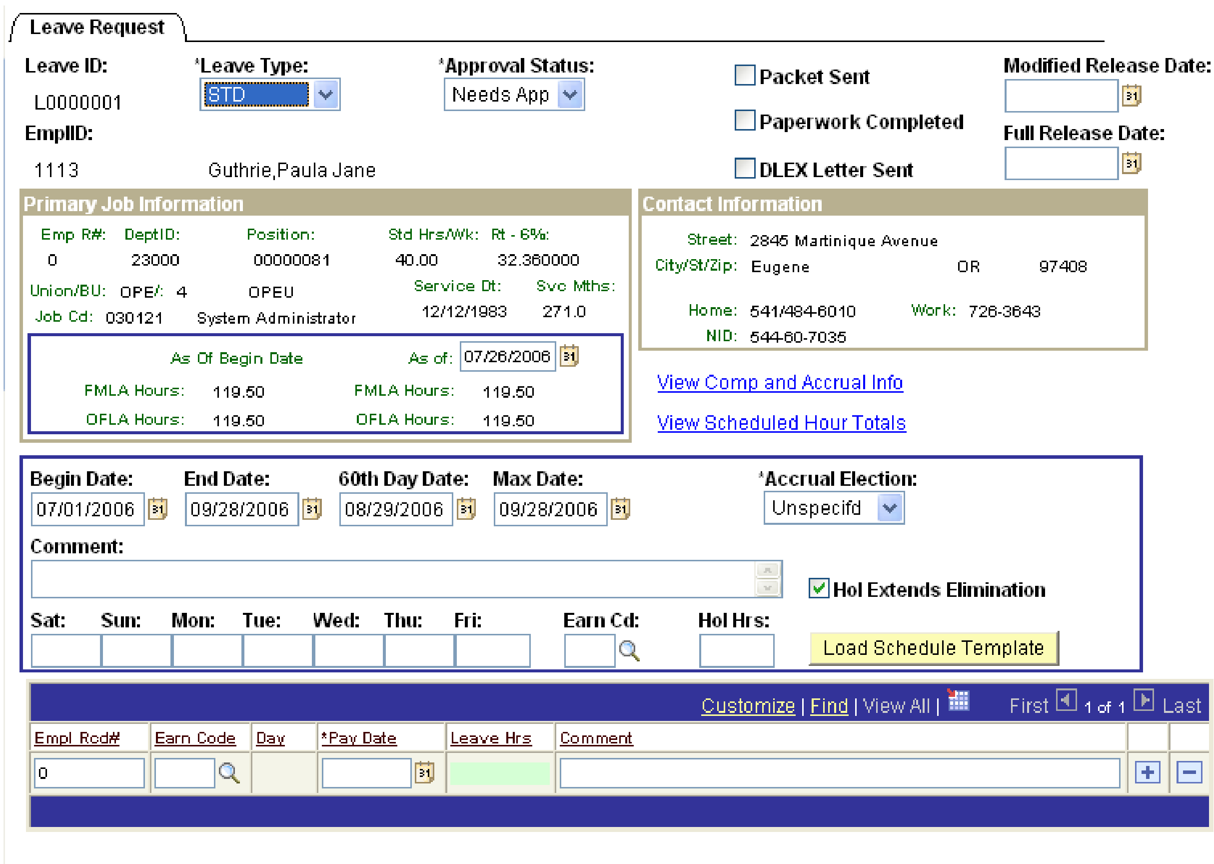
Leave Requests - Benefits

The leave request page is used by the employee to apply for a specific leave request (injury, workers comp, fmla, ofla, etc). They fill out the leave request and let HR know that they have applied for it. Should benefit staff fill out the form or should the employee?? Once the request is entered it needs to go through an approval process.

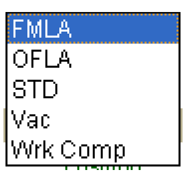
1. Navigate to SPR Custom > Leave Requests – Benefits
2. Click on the Add a New Value



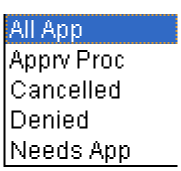
3. Keep the NEW in the Leave ID number and it will assign next number available
4. Enter in the EMPLID of the employee that you are adding the leave request for.
5. Click on Add.
6. The leave request page will appear.



7. Leave type



8. Approval status



9. Packet Sent
10. Paperwork Completed
11. DLEX Letter Sent
12. Modified Release Date
13. Full Release Date
14. As of Date
15. FMLA and OFLA hours available
16. View Comp and Accrual Info link

Accrual Balance Information

Comp Time Information	
Description:	**Balance:**
Comp Time	0.000000

Accrual Balances Customize | Find | View All | First 1-3 of 4 Last

Plan Type	Balance
Sick	0.000000
Vacation	0.000000
Compensatory Time	0.000000

Return

17. View Scheduled Hours Total link

Scheduled Leave Hour Totals Customize | Find | View All | First 1 of 1 Last

Earnings Code	Descr	Leave Hours
		4.00

Return

18. Begin Date
19. End Date
20. 60^{th} Day Date
21. Max Date
22. Accrual Election
23. Comments
24. Schedule??
25. Employee Earn Code
26. Pay Date
27. Leave Hours
28. Comments

Training - Administration

Training is a separate section in the TC system. It allows you to track trainings that the City employees have taken. It can be implemented by departments or Citywide. There are 3 steps that have to happen to track the training.

1. Identify Courses
    a. New courses need to be setup in PS
    b. Course custom field department???
2. Allow training for the Department
3. Each employee will enter in the course in TC system under the My Training tab
    a. This training tab needs to be made available to the employee
    b. Employee can view all the training course they have taken at any time
4. Administer training
    a. Finalize in TC system will dump into training in PS

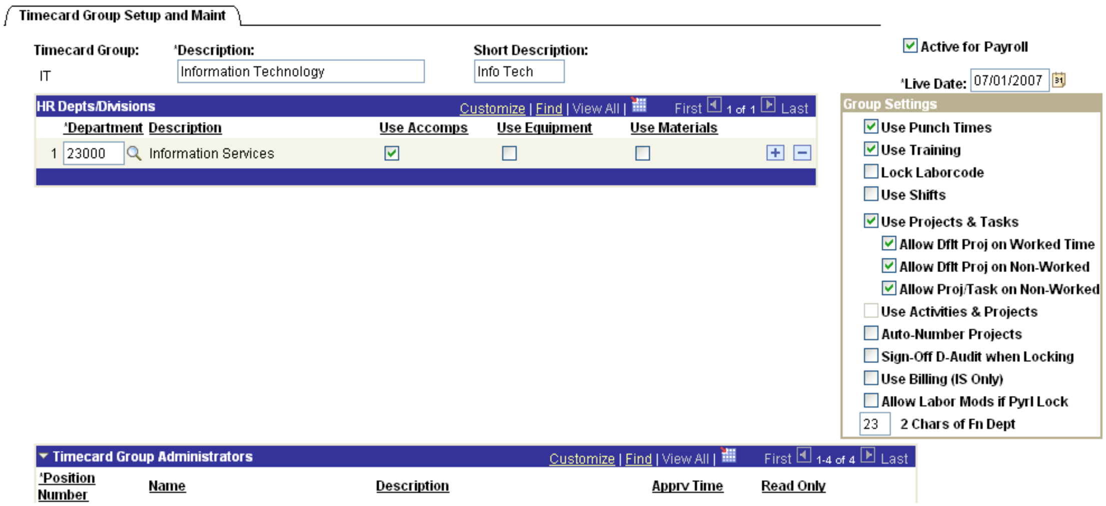
We will be looking at implementing the training portion after we have been live for a while. It will not be introduced when employees go live on the system July 2007. License and certification classes and information will not be entered in the time entry system as there is another place in PS for that.

Identify Courses

1. This menu option is not currently available to production. It needs to be turned on and made available.
2. It is through the Enterprise Learning module.

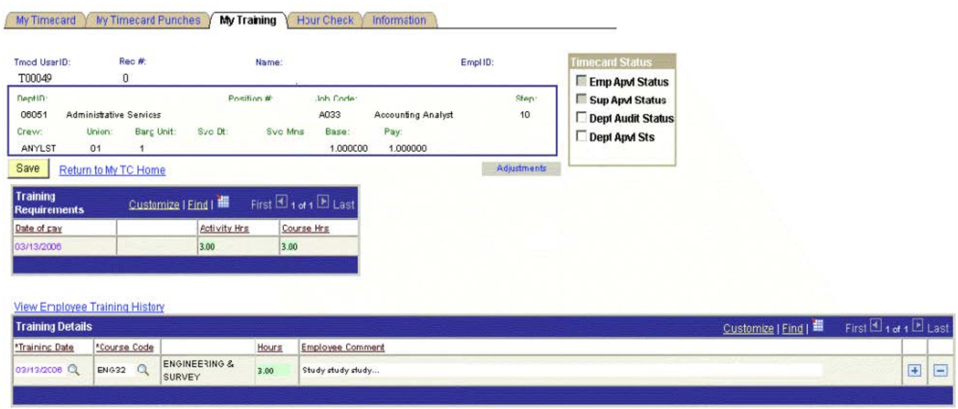
Allow Training for the Department

1. Navigate to Set Up HRMS > SPR Timecard Settings > Timecard Group Settings
2. Call up the department timecard group
3. In the Group Settings Area on the right, check the Use Training box.
4. This will allow the department employees to have the My Trainings tab available to them.



Employee Training Entry

My Training tab (If Available)



General Information
The "My Training" tab allows you to View and Track training that you have taken. In some cases, training entries will be prompted by activities and hours you have specified on the timecard, but you can enter trainings that do not correspond to timecard entries as well.

Training Requirements
This grid-box displays any days / activities that you have specified on the timecard that request training information be entered. Days are color-coded to make it easier to find entries in the Training Details grid below.

Training Details
This grid is used by the user to enter information about courses taken.

Training Date - Specify the Date(s) the training occurred.
Course Code - Specify the course code that you took from the list.
Hours – Specify the hours of training you received. (This field is optional).
Employee Comment – An optional comment about the entry.

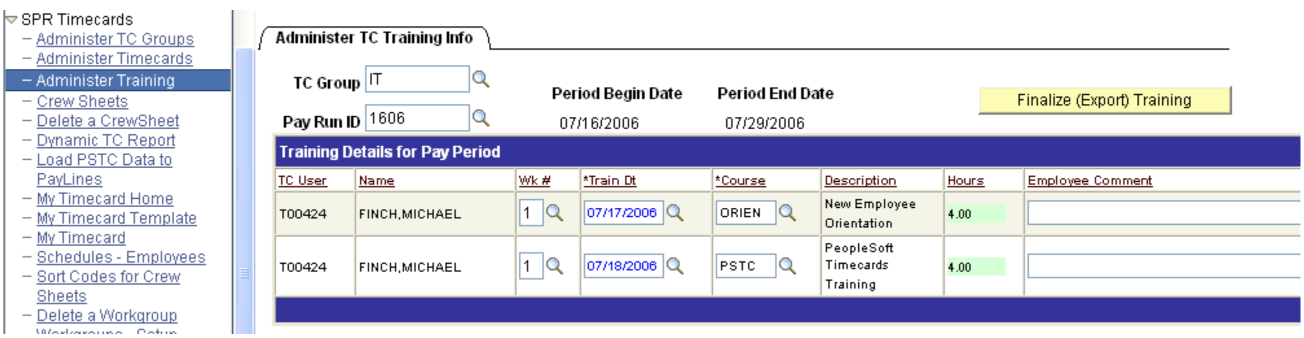
View Employee Training History

Use this link to view all of your training tracked in PeopleSoft. It will NOT include entries on timecards that have not been processed yet.

Administer Training

Once the timecards have been entered and approved, the department can export the training records from timecards to PS.

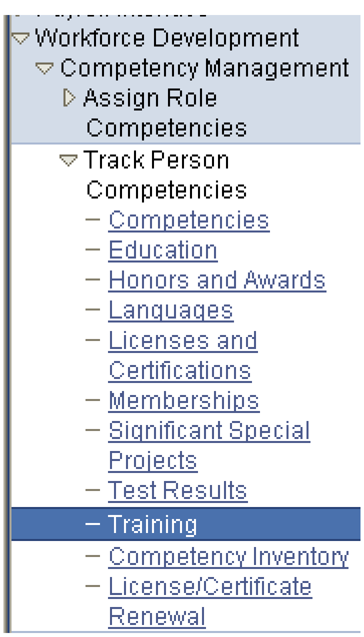
1. Navigate to SPR Timecards > Administer Training
2. Enter in the TC Group
3. Check all of the training records that were entered to make sure they are okay
4. Click on the Finalize (Export) Training button and it will upload the training records into the employee training in PS.



Review Training Records

To review the training records of all employees.

1. Navigate to Workforce Development > Career Planning > Review Career Summaries > Training ?? or Workforce Development > Competency Management > Track Person Competencies > Training ??


Workforce Development
Competency Management
Assign Role Competencies
Track Person Competencies
Competencies
Education
Honors and Awards
Languages
Licenses and Certifications
Memberships
Significant Special Projects
Test Results
Training
Competency Inventory
License/Certificate Renewal

IT Stuff

Create New User for TC Entry

This is a description field that is automatically populated upon entering in the Labor Code, Project, Task, etc. This field is used at Lane County for public works activity codes for cost accounting. We will probably never use it.

Overview of system

- 99 tables
- 125 views
- LCTC is prefix
- LC is also used as prefix
- Started July 2004
- Built strongly on the user side
- There is some hardcoding on the system but mainly table driven

Projects where TC resides

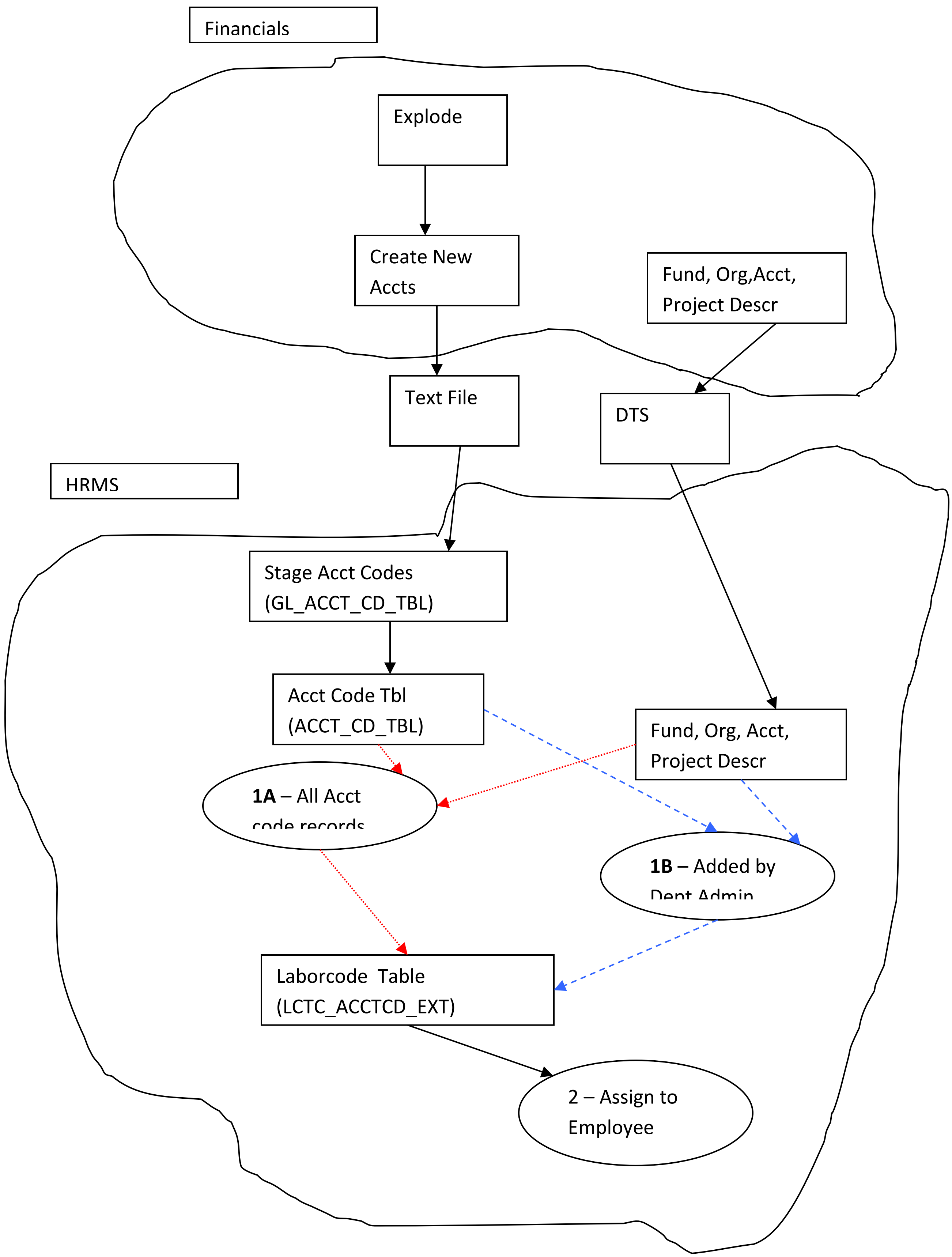
- SPR_XFER_BENLV - benefit leave
- SPR_XFER_HTML_SETUP – dynamic reporting
- SPR_XFER_PSTC – time entry main objects
- SPR_XFER_PSTC_X1 – additional objects that are needed
- SPR_XREF_RETROPAY – retro pay
- SPR_XREF_W4_CUSTOM – customized W4 component for ePay using Oregon also

App Engine

- LCTC_JBSYNC – job profile sync
- LCTC_LOAD – load paysheets

Records

- core tables
- 3 tables for getting payroll done
    - LCTC_TMCD – header record
    - LCTC_TMCD_DATA – enter in TC information
    - LCTC_TMCD_ADJMT – adjustments for time entry



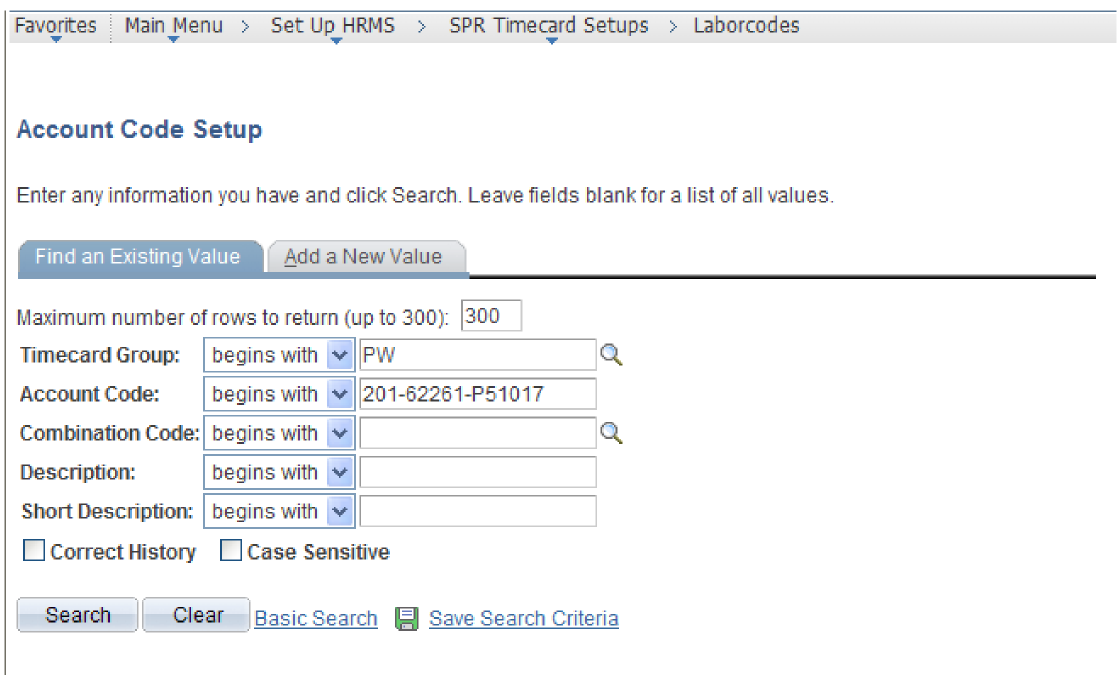
Financials
Explode
Create New Accts
Fund, Org,Acct, Project Descr
Text File
DTS
HRMS
Stage Acct Codes (GL_ACCT_CD_TBL)
Acct Code Tbl (ACCT_CD_TBL)
Fund, Org, Acct, Project Descr
1A – All Acct code records
1B – Added by Dept Admin
Laborcode Table (LCTC_ACCTCD_EXT)
2 – Assign to Employee

How to create new Laborcodes

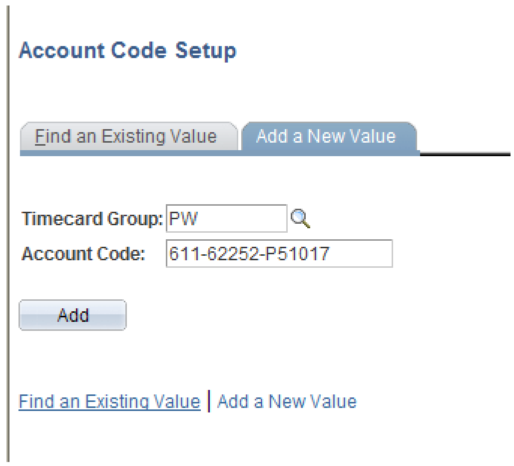
Tables

PS_LCTC_ACCTCD_EXT
PS_VALID_COMBO_TBL
PS_LCTC_ACCT_TCID
PS_LCTC_PROJ_ACCT
PS_LCTC_PROJECT
PS_ACCT_CD_TBL
PS_ACCT_CD_TBL_GL

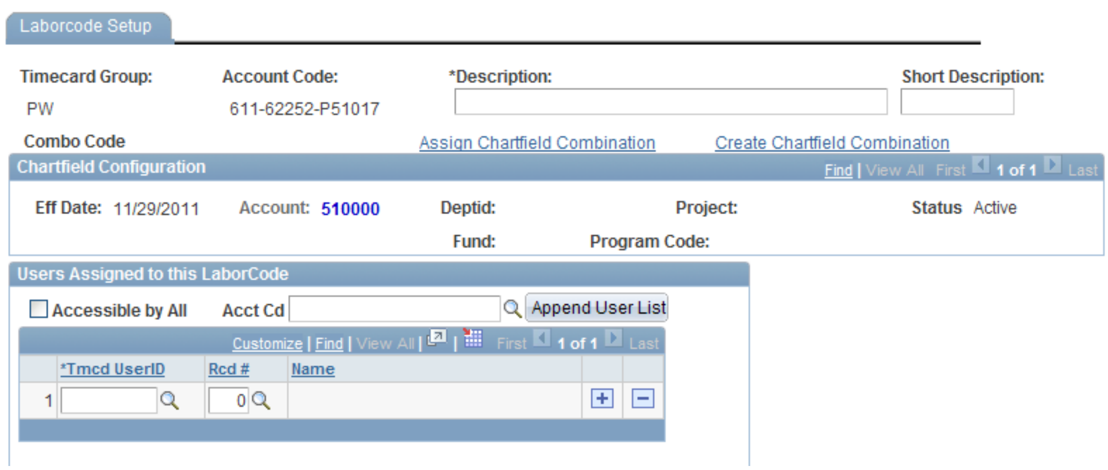
1. Navigate to MM > Setup HRMS > SPR Timecard Setup> Laborcodes
2. Enter in the Timecard Group (department)
3. Enter in the Account Code to see if it exists. When you enter in the combination code, you need to enter in the dashes between each account code chartfield. The combination code is FFF-DDDDD-PPPPPP. FFF = fund code 3 digits, DDDDD = department code 5 digits, and PPPPPP = project or grant code 6 digits.



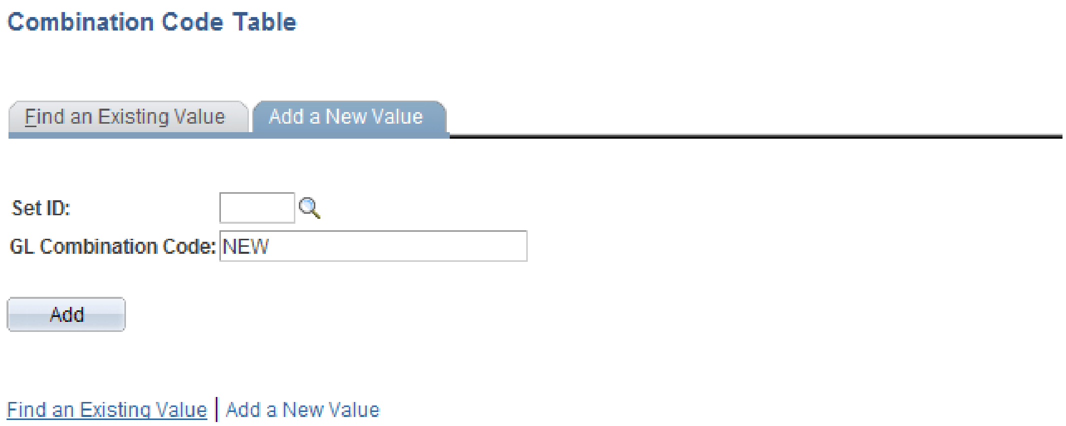
4. If it exists, then it can be setup to be used by an employee in their timecards. If it is not setup , continue to the next steps.
5. Click on Add a New Value in Laborcode page. The Timecard group that will be using the new combo string and the Account Code will stay populated. The account code string DOES NOT include the actual account code.



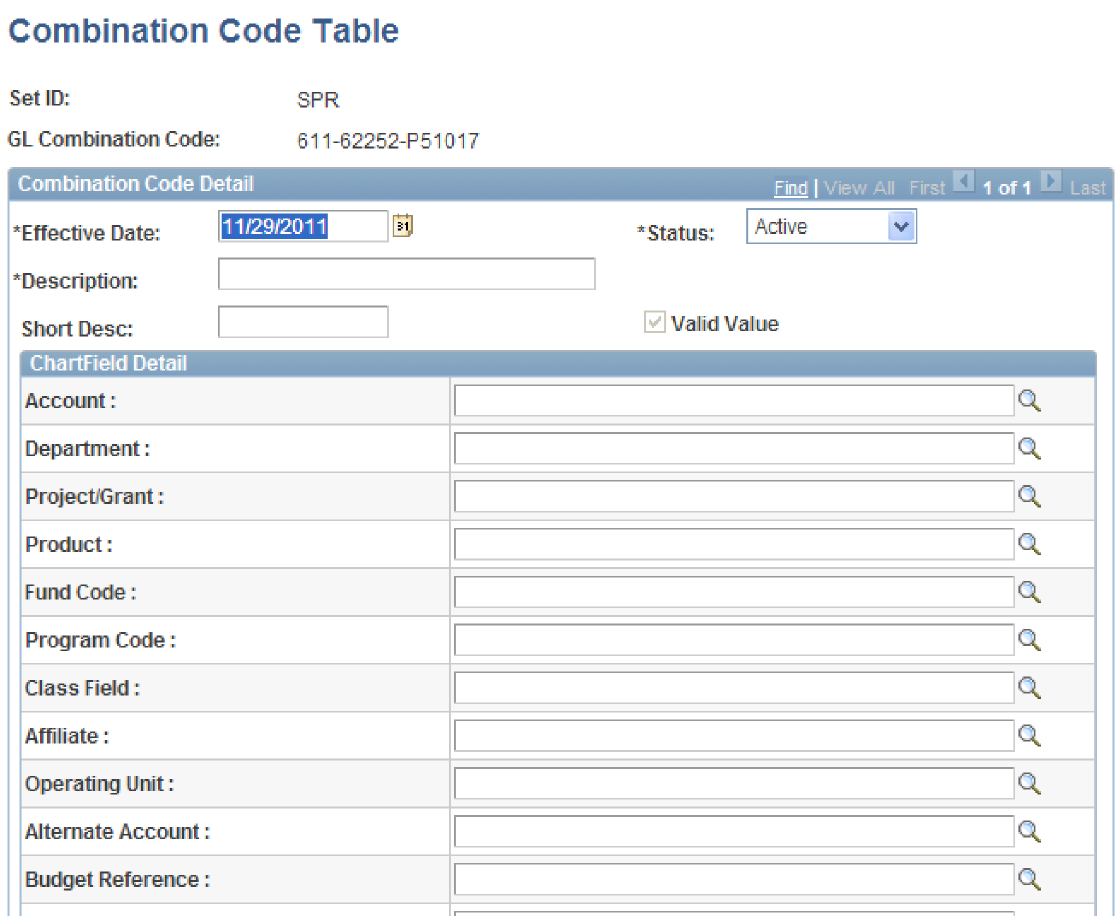
6. Click on Add button and it will take you to the Laborcode Setup page.



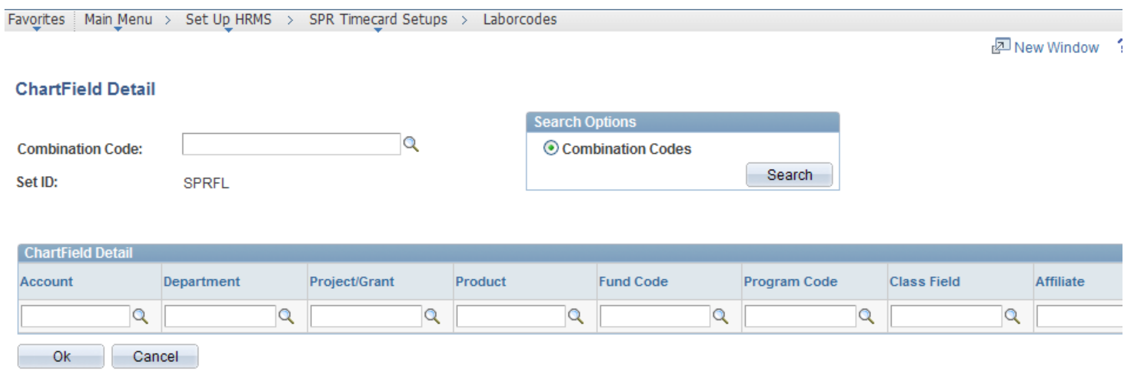
7. There are 2 hyperlinks on this page. One is to assign the chartfield combination if it exists and the other is to create the chartfield combination. If you think the chartfield exists, then skip to step 9. If the chartfield combo doesn't exist, you will need to create it in the next steps.
8. Click on the Create Chartfield Combination hyperlink and it will take you to this page.



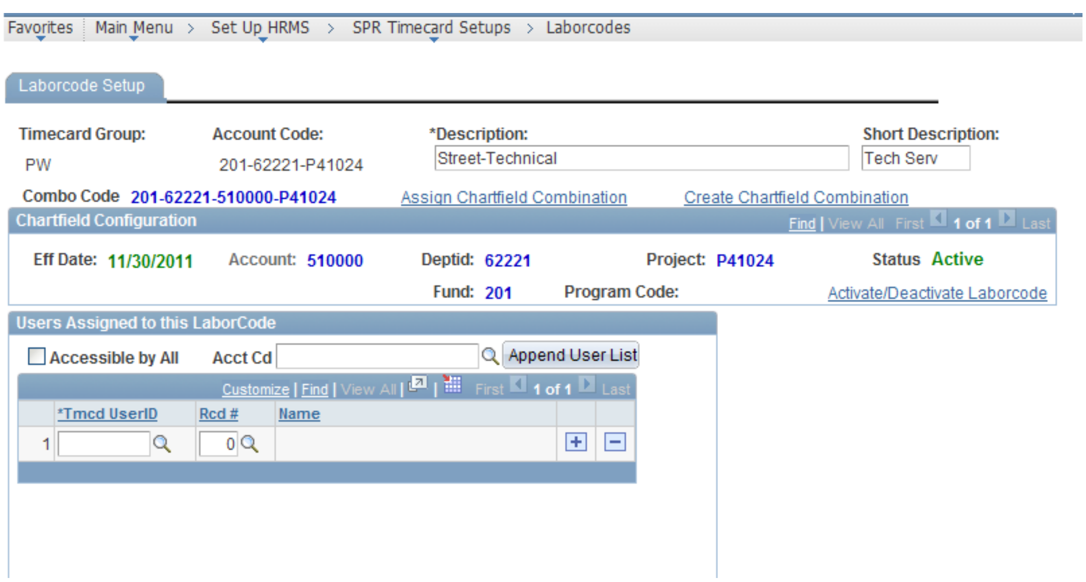
9. Enter in the Set ID as **<u>SPR.</u>** Enter in the GL Combination Code as FFF-DDDDD-AAAAAA-PPPPPP. FFF = fund code 3 digits, DDDDD = department code 5 digits, AAAAAA = account code 6 digits, and PPPPPP = project or grant code 6 digits. Click on the ADD button and it will go to a new page.



10. Change the effective date to the creation of the project or grant date or leave it as today's date. The description and short description should be Salaries. Enter in the Account, Department, Project/Grant, and Fund Code. Enter in the Class field if there is an activity code assigned to it.
11. Click on Save. Close out of this page by using the red X at the top right to return to the previous page.
12. Once the combination code has been setup (or if you are just assigning and already have an existing laborcode), press the Assign Chartfield Combination hyperlink.
13. Enter in either the individual Chartfield Detail. The Chartfield detail would be Account, Department, Project/Grant, and Fund.



14. Click on Save
15. It will then take you back to the main laborcode page. Save record.



16. Once you have linked the laborcode with the combo code, you can move on to assigning the code to a user.

Creating Laborcodes in Time Entry

O:\Time Entry\laborcodes.xls

Insert into PS_LCTC_ACCTCD_EXT

LC_TMCD_GROUP – based on first 2 char of dept field (48 = LIB, 36 = POL)

LC_LABORCODE – fund, dept, and project

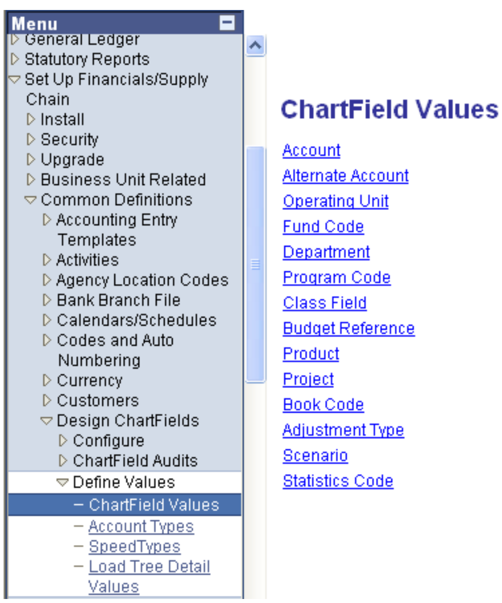
ACCT_CD – fund, dept, account and project

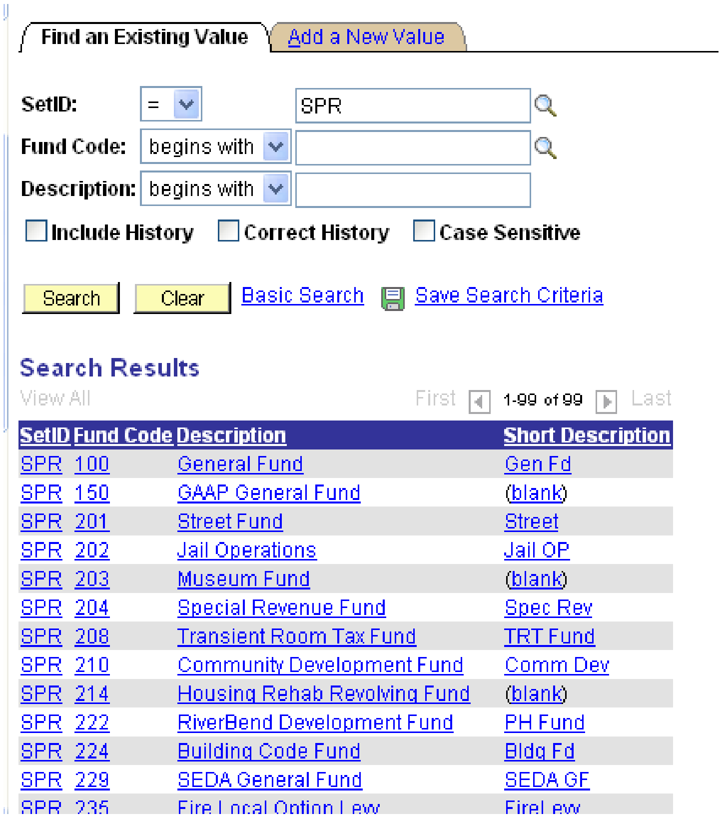
DESCR – blank

DESCR50– see below

LC_GRP_ACCESS_FLAG - Y

DESCRSHORT – 10 character department description





Find an Existing Value | Add a New Value

SetID: = SPR

Fund Code: begins with

Description: begins with

Include History Correct History Case Sensitive

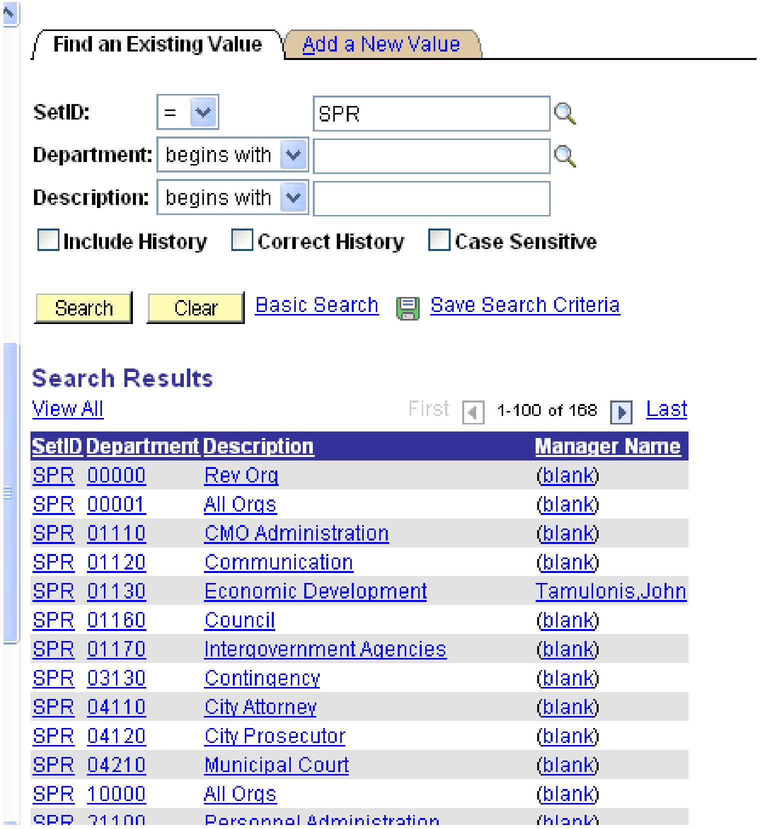
Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-99 of 99 Last

SetID	Fund Code	Description	Short Description
SPR	100	General Fund	Gen Fd
SPR	150	GAAP General Fund	(blank)
SPR	201	Street Fund	Street
SPR	202	Jail Operations	Jail OP
SPR	203	Museum Fund	(blank)
SPR	204	Special Revenue Fund	Spec Rev
SPR	208	Transient Room Tax Fund	TRT Fund
SPR	210	Community Development Fund	Comm Dev
SPR	214	Housing Rehab Revolving Fund	(blank)
SPR	222	RiverBend Development Fund	PH Fund
SPR	224	Building Code Fund	Bldg Fd
SPR	229	SEDA General Fund	SEDA GF
SPR	235	Fire Local Option Levy	FireLevy

Using FUND_TBL.DESCRSHORT (8 character field)


Find an Existing Value | Add a New Value

SetID: = SPR

Department: begins with

Description: begins with

Include History Correct History Case Sensitive

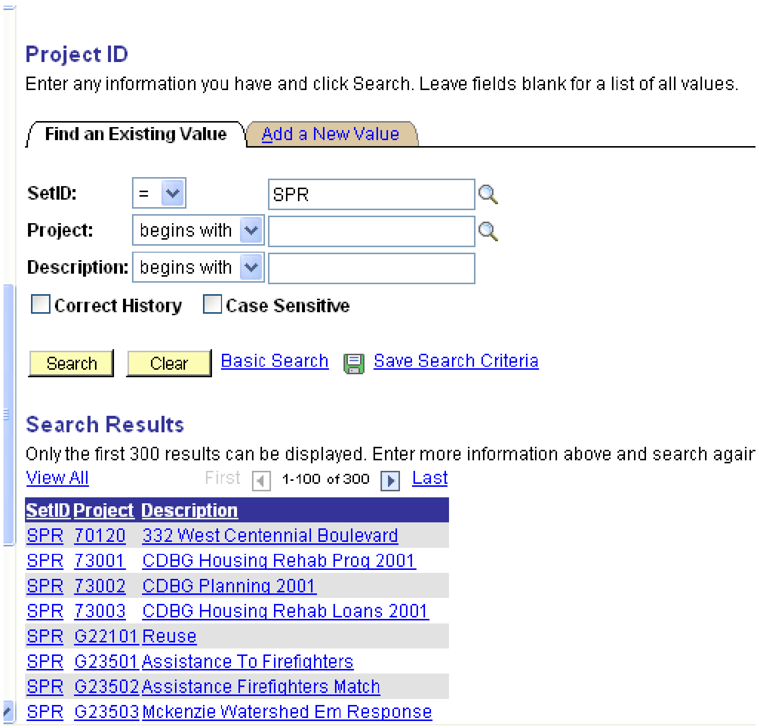
Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-100 of 168 Last

SetID	Department	Description	Manager Name
SPR	00000	Rev Org	(blank)
SPR	00001	All Orgs	(blank)
SPR	01110	CMO Administration	(blank)
SPR	01120	Communication	(blank)
SPR	01130	Economic Development	Tamulonis,John
SPR	01160	Council	(blank)
SPR	01170	Intergovernment Agencies	(blank)
SPR	03130	Contingency	(blank)
SPR	04110	City Attorney	(blank)
SPR	04120	City Prosecutor	(blank)
SPR	04210	Municipal Court	(blank)
SPR	10000	All Orgs	(blank)
SPR	21100	Personnel Administration	(blank)

Uses DEPT_TBL.DESCR (10 character trimmed field)



SetID	Project	Description
SPR	70120	332 West Centennial Boulevard
SPR	73001	CDBG Housing Rehab Prog 2001
SPR	73002	CDBG Planning 2001
SPR	73003	CDBG Housing Rehab Loans 2001
SPR	G22101	Reuse
SPR	G23501	Assistance To Firefighters
SPR	G23502	Assistance Firefighters Match
SPR	G23503	Mckenzie Watershed Em Response

Uses PROJECT_FS.DESCR (30 characters)

LCTC_LOAD Functionality

This document steps through how LCTC_LOAD works in loading timecards to paysheets in PeopleSoft. The load process is an app engine program. Here are the steps that it goes through to load the paysheets.

Steps in LCTC_LOAD app engine program

1. Main – Load Timecard Export Table
    a. Get run control data runcntl PS_RC_PAYINIT
    b. Delete Pay Tables – **DelPyrl** section reset1
    c. Delete Export Entry reset2 PS_LCTC_EXPORT
    d. Delete Export Temp Table reset3 PS_LCTC_EXPORT_TMP
    e. Load Additional Pay Entries – **LdAddlPy** section addlpay1
    f. Load Basic Timecard Info step01 PS_LCTC_EXPORT_TMP
    g. Compensate for Rounding – **CompRnd** section step01A
    h. Move Temp info to Export step01B PS_LCTC_EXPORT
    i. Update PAY_LINE key fields step01C PS_LCTC_EXPORT
    j. Update Premium Percentage step02 PS_LCTC_EXPORT
    k. Apply Hour Multiplier step02B PS_LCTC_EXPORT
    l. Update Rate Adjustment Rate for J Types step03 PS_LCTC_EXPORT
    m. Update Rate Adjustment Rate for O Types step03A PS_LCTC_EXPORT
    n. Update Rate Adjustment Rate for X Types step03B PS_LCTC_EXPORT
    o. Update Rate Adjustment Rate for X Types no JC step03C PS_LCTC_EXPORT
    p. Update Comprate step04 PS_LCTC_EXPORT
    q. Update Account Code step05 PS_LCTC_EXPORT
    r. Setup Page, Line, and Addl Number step06 PS_INSTALLATION
    s. Prepare Export Data Pages – **PrepPyrl** section step07
    t. Insert Pay Table Data – **InsPyrl** section step08
    u. Mark Standard PED Timecard paid step09 PS_LCTC_TMCD_DATA
    v. Mark Alternate PED Timecard paid step10 PS_LCTC_TMCD_DATA
    w. Update Line Number step10A PS_LCTC_TMCD_DATA
    x. Mark TMCD Paid step11 PS_LCTC_TMCD

2. **DelPyrl** section – Delete Payroll Entries
    a. Clear Other Earnings step01 PS_PAY_OTH_EARNS
    b. Clear Pay Earnings step02 PS_PAY_EARNINGS
    c. Clear Pay Line step03 PS_PAY_LINE
    d. Clear Pay Page step04 PS_PAY_PAGE

3. **LdAddlPy** section – Load Additional Pay to Adjustments

a. Insert LCTC_TIMCD_ADJMT records step01 PS_LCTC_TMCD_ADJMT

4. **CompRnd** section – Compensate for Rounding
    a. Get rounding discrepencies step01
    b. Apply rounding corrections
    c. Update total hours and amounts step02 PS_LCTC_EXPORT_TMP

5. **PrepPyrl** section – Add Pages, Lines and Additional Numbers
    a. Select from LCTC_EXPORT step01 PS_LCTC_EXPORT
    b. Manage Pay, Lines and Additional Numbers
    c. Update LCTC_EXPORT records

6. **InsPyrl** section – Insert to PeopleSoft Payroll
    a. Check for 300+ lines check01
    b. Insert Pages step01 PS_PAY_PAGE
    c. Insert Lines step02 PS_PAY_LINE
    d. Insert Earns step03 PS_PAY_EARNINGS
    e. Insert Other Earns step04 PS_PAY_OTH_EARNS
    f. Insert Addl Pay based on earnings step04B PS_PAY_OTH_EARNS
    g. Insert Addl Pay based on accumulation step04BC PS_PAY_OTH_EARNS
    h. Update Other Earning Stats step05 PS_PAY_OTH_EARNS
    i. Update Earning Stats step06 PS_PAY_EARNINGS

Notes:

I have modified the LCTC_LOAD application engine (TC to Payroll export) to load these calculated additional pay types in the following manner:

SP2/5 or other Special Accumulator based additional earning codes will load on the first line only in other earns for a given earnings record on a date. Thus, if an employee has page 3600, Line 2, Addl 1 and 2, and both are for 12/24/07, then it will only load SP5 for example on 3600, 2, 1 and not on 3600,2,2.

Earncode based additional pays (567 for example) will now only load into other-earnings if there is hours for the earncode it calculates on (OVT in this case). So if a given pay-earnings record does not have OVT earnings, then 567 will not load onto it.

These changes have been applied directly to Production, and do not exist in any other database. All changes I have made are located in project SPR_MBF1_17_08 if you wish to move them to PAY or somewhere to test them first (ya, right..). Obviously I have not been able to test these other than to run the SQL statements separately against last period to see what it would have looked like. It appeared to be correct, for example emplid 1627, the new statements would not have loaded the SP2 and SP5 records onto Addl-nbr 11.

Added an error-check in LCTC_LOAD app engine (PSTC Payroll export) that will generate a “No Success” if it attempts to create 300 or more lines in Pay-lines for a single employee. The error will list the employee(s) and the number of lines.

Paula, it looks great, you did it exactly right. It looks like you are inserting the FLSA into PAY_EARNINGS. Assuming that is so, then this should be great. If FLSA is going to end up in any record "above" PAY_EARNINGS (such as PAY_LINE or PAY_PAGE) and there is the possibility that the value might change mid-period, then you have to do it differently. But since it is going into PAY_EARNINGS, and because those rows are by day, then that isn't a concern and you did it perfectly.

To correct the problem where additional pay splits are only loading the first line and not all lines (Example TC User T00001), Paula, you need to do this:

1: Go into App-designer and bring up the LCTC_LOAD application engine.

2: Go into the LdAddlPy section.

3: Go into the PeopleCode step (Create Adjustment Records PeopleCode).

Find the following statement:

```
SQLExec("Select count(*) from PS_LCTC_TMCD_ADJMT where LC_TMCD_USERID = :1 and LC_TMCD_USER_RCD = :2 and LC_TMCD_GROUP = :3 and RUN_ID = :4 and PAY_END_DT = :5 and WEEK_BEGIN_DT = :6 and LC_WEEKNO = :7 and ADJ_DT between :8 and :9 and ERNCD = :10", LCTC_LOADD3_AET.LC_TMCD_USERID, LCTC_LOADD3_AET.LC_TMCD_USER_RCD, LCTC_LOADD3_AET.LC_TMCD_GROUP, LCTC_LOADD3_AET.RUN_ID, LCTC_LOADD3_AET.PAY_END_DT, &WkBegDt, &WkNo, AddToDate(LCTC_LOADD3_AET.PAY_END_DT, 0, 0, - 13), LCTC_LOADD3_AET.PAY_END_DT, LCTC_LOADD3_AET.ERNCD, &StsChk);
```

Change it to be: (Difference is highlighted in blue)

```
SQLExec("Select count(*) from PS_LCTC_TMCD_ADJMT where LC_TMCD_USERID = :1 and LC_TMCD_USER_RCD = :2 and LC_TMCD_GROUP = :3 and RUN_ID = :4 and PAY_END_DT = :5 and WEEK_BEGIN_DT = :6 and LC_WEEKNO = :7 and ADJ_DT between :8 and :9 and ERNCD = :10 and LC_LABORCODE = :11", LCTC_LOADD3_AET.LC_TMCD_USERID, LCTC_LOADD3_AET.LC_TMCD_USER_RCD, LCTC_LOADD3_AET.LC_TMCD_GROUP, LCTC_LOADD3_AET.RUN_ID, LCTC_LOADD3_AET.PAY_END_DT, &WkBegDt, &WkNo, AddToDate(LCTC_LOADD3_AET.PAY_END_DT, 0, 0, - 13), LCTC_LOADD3_AET.PAY_END_DT, LCTC_LOADD3_AET.ERNCD, &LaborCd, &StsChk);
```

The protection I added to prevent the processor from double-loading adjustments in the event that the load process had to be run more than once was not sensitive enough to check the laborcode, so it was only loading 1 entry and skipping any additional ones for the same person.

I have already made this change in HRT, but not sure if that is up to date and I can't reach your production environment from here. So I recommend applying this code directly to production rather than copying the app-engine over from HRT.

Hi Paula. I am pretty certain that UNION_CD is being sent to PAY_EARNINGS, and is part of the LCTC_LOAD/LCTC_EXPORT process/Table. I also think that FLSA_STATUS is there too, but not as certain as UNION_CD. Anyway, absolutely they can be added if they are not there for some reason..

Allocate and PW Allocate

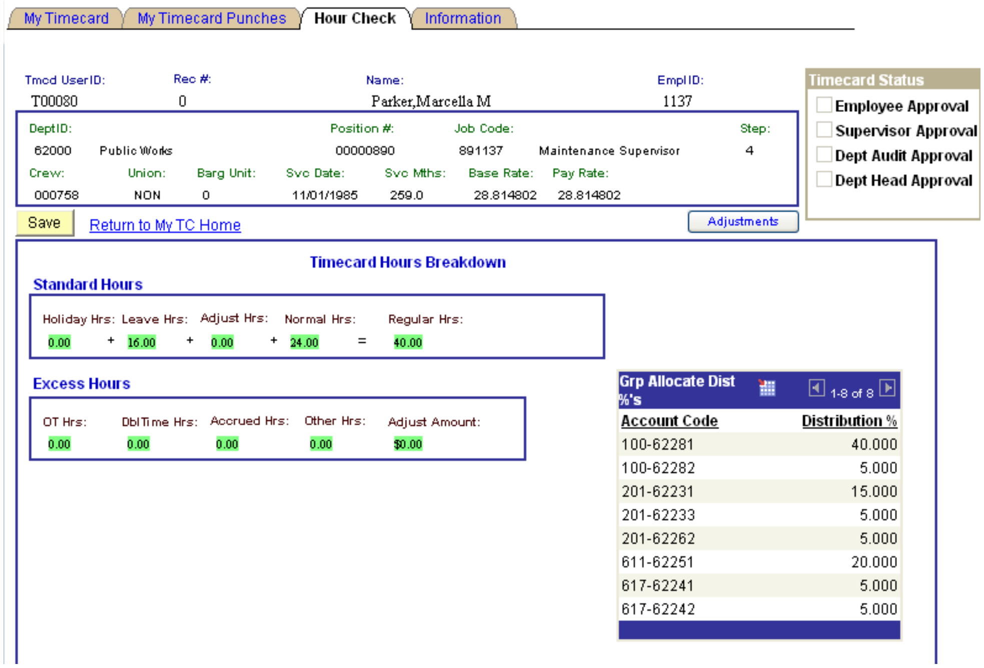
You may have two special account code options, Allocate or PW Allocate. These are used to split out your time to several different accounts.
The Allocate code is based on your budgeted time allocation that is in payroll, not everyone has this allocation.
The other is a department specific allocation that is used in Public Works. This is based on your last 4 weeks of time and selects the top 3 accounts that you have charged to. This is used mainly for vacation and sick allocation. If you are a new employee, you should not use this option for the first 4 weeks of employment.
If you are using Allocate, you should not be using PW Allocate. If you use PW Allocate, you should not be using Allocate.

PW Allocate

The other way that an employee can allocate their time is through the department/group allocation. Each department can use the department allocation but we only have PW setup and that department will probably be the only one that will use the Group Allocation. The way that this allocation works is identify employees that should have their entered work-hours allocated for use with leave time. Each employee in a timecard group are identified as eligible for the allocation setup and usage. An automated process will automatically determine the allocations from the prior 4 weeks of confirmed payroll.

The processor selects every employee that is actively setup for Group-allocation. Each employee is then processed one-by-one to see how many worked-hours they had in the last 2 pay-periods. If their worked hours are greater than or equal to 20, their allocations are calculated. If an employee does not qualify as having at least 20 worked hours, their records are skipped, and the department can enter/maintain their allocations manually. The “Group Allocate” labor-code selection will only be used on non-worked time.

"PW-Allocate" is setup by entering a distribution on the Timecard-profile page AND/OR by using the application engine to look at historical employee time to make an allocation. The reason the PW-allocation setup is on the Profile page is because in the case of a new-hire, they need to give them a starting allocation since the program won't have any hours with which to base an allocation on. They may also want to manually manipulate it.



My Timecard | My Timecard Punches | Hour Check | Information

Tmcd UserID: T00080
Rec #: 0
Name: Parker,Marcella M
EmplID: 1137

DeptID: 62000 Public Works
Position #: 00000890
Job Code: 891137 Maintenance Supervisor
Step: 4
Crew: 000758
Union: NON
Barg Unit: 0
Svc Date: 11/01/1985
Svc Mths: 259.0
Base Rate: 28.814802
Pay Rate: 28.814802

Timecard Status
- Employee Approval
- Supervisor Approval
- Dept Audit Approval
- Dept Head Approval

Save | Return to My TC Home | Adjustments

Timecard Hours Breakdown

Standard Hours

Holiday Hrs: 0.00 + Leave Hrs: 16.00 + Adjust Hrs: 0.00 + Normal Hrs: 24.00 = Regular Hrs: 40.00

Excess Hours

OT Hrs: 0.00
DblTime Hrs: 0.00
Accrued Hrs: 0.00
Other Hrs: 0.00
Adjust Amount: $0.00

Grp Allocate Dist %'s — 1-8 of 8

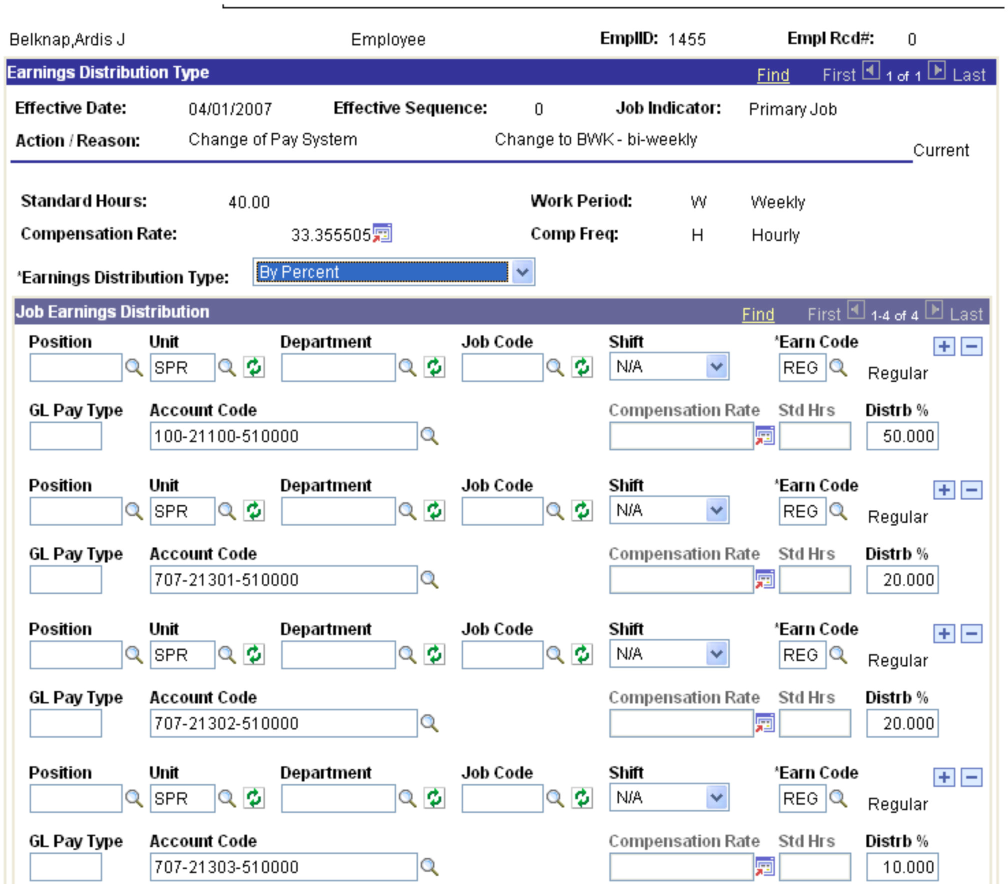
Account Code	Distribution %
100-62281	40.000
100-62282	5.000
201-62231	15.000
201-62233	5.000
201-62262	5.000
611-62251	20.000
617-62241	5.000
617-62242	5.000

Allocate Discussion

There are two ways in which employees can allocate their time. One is through budget allocate and the other is through previous 4 week work allocation. Following is a description of both.

Allocate – through the budget

When a position is budgeted in different accounts and different funds, the employee may be required to charge their time to those funds. The allocation is by a percentage in each of the accounts. Below is an example of an employee and their allocation. The allocation is setup in the Job record for the employee under Earning Distribution. All employees have an earnings distribution type of NONE or BY PERCENT. If an employee has an earnings distribution type of none, then they don't have the allocate option on the timecards. Sometimes there may be a budget allocation but the department chooses not to allocate through earning allocation. Their time is then manually entered into account code strings which may include projects.



Belknap,Ardis J Employee EmplID: 1455 Empl Rcd#: 0

Earnings Distribution Type Find First 1 of 1 Last

Effective Date: 04/01/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Change of Pay System Change to BWK - bi-weekly Current

Standard Hours: 40.00 Work Period: W Weekly

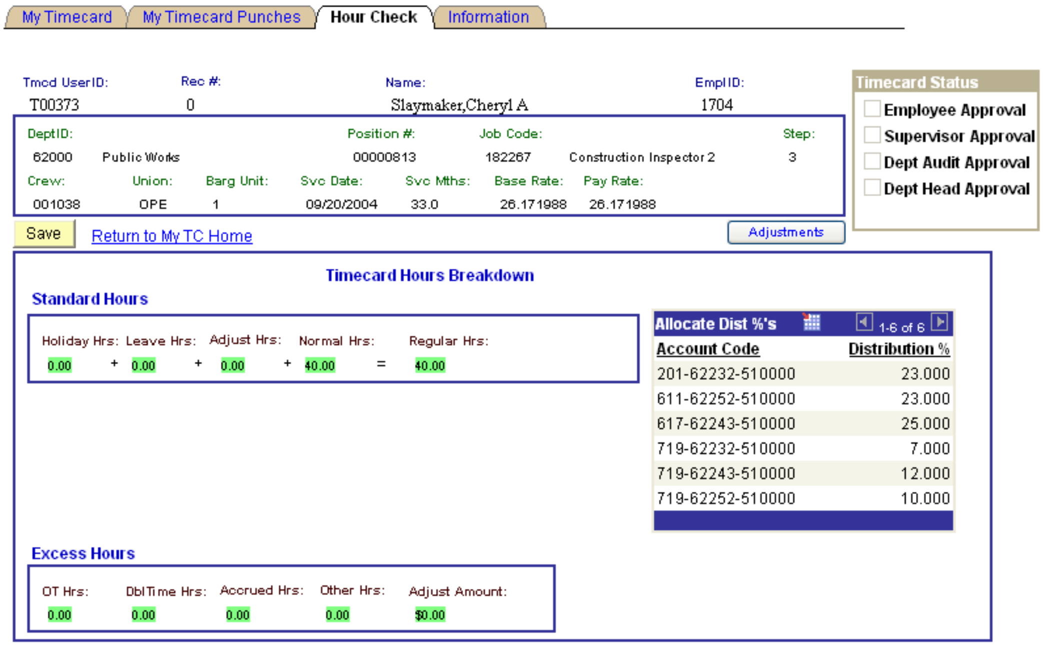
Compensation Rate: 33.355505 Comp Freq: H Hourly

*Earnings Distribution Type: By Percent

Job Earnings Distribution Find First 1-4 of 4 Last

Position	Unit	Department	Job Code	Shift	*Earn Code		GL Pay Type	Account Code	Compensation Rate	Std Hrs	Distrb %
	SPR			N/A	REG	Regular		100-21100-510000			50.000
	SPR			N/A	REG	Regular		707-21301-510000			20.000
	SPR			N/A	REG	Regular		707-21302-510000			20.000
	SPR			N/A	REG	Regular		707-21303-510000			10.000

For the employee, on their timecards, on the Hour Check page, it displays if they have an Allocation by percentage in the Job record. So when they are entering their hours and they are using Allocate, they can see from this page, what their actual allocation will be.



PW Allocate

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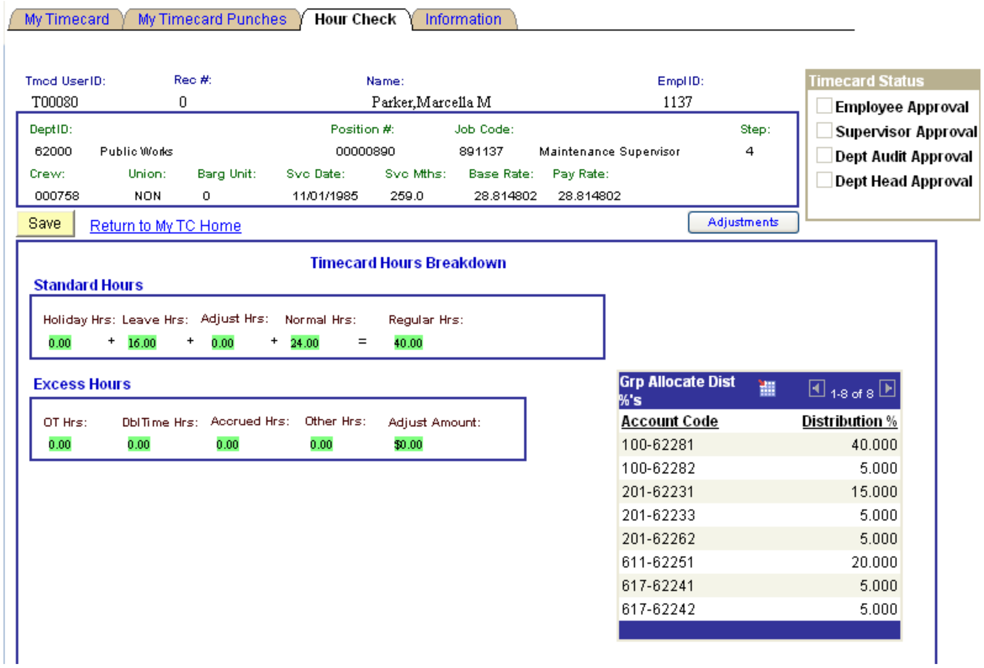

My Timecard | My Timecard Punches | Hour Check | Information

Tmcd UserID:	Rec #:	Name:	EmplID:
T00080	0	Parker,Marcella M	1137

DeptID:		Position #:	Job Code:		Step:
62000	Public Works	00000890	891137	Maintenance Supervisor	4

Crew:	Union:	Barg Unit:	Svc Date:	Svc Mths:	Base Rate:	Pay Rate:
000758	NON	0	11/01/1985	259.0	28.814802	28.814802

Timecard Status

- Employee Approval
- Supervisor Approval
- Dept Audit Approval
- Dept Head Approval

Save

Return to My TC Home

Adjustments

Timecard Hours Breakdown

Standard Hours

Holiday Hrs:		Leave Hrs:		Adjust Hrs:		Normal Hrs:		Regular Hrs:
0.00	+	16.00	+	0.00	+	24.00	=	40.00

Excess Hours

OT Hrs:	DblTime Hrs:	Accrued Hrs:	Other Hrs:	Adjust Amount:
0.00	0.00	0.00	0.00	$0.00

Grp Allocate Dist %'s 1-8 of 8

Account Code	Distribution %
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100-62282	5.000
201-62231	15.000
201-62233	5.000
201-62262	5.000
611-62251	20.000
617-62241	5.000
617-62242	5.000

PW Allocation Specifications for changes to the TC system

Allocation has been implemented in the system with regards to the earnings distribution page. If an employee does not have distribution, then there is no allocation option on the drop down for entering in their time. If they do use the allocate option, it splits all the time allocated to the percentage that is stated on the earnings distribution page.

There is another scenario that we need to add, PW Allocation. It is different than the allocation customization stated above. We have met with the people in Public Works to talk about how they allocate and if there was other options in trying to record the information on their timecard. Hopefully we came up with an option that will be easy to implement and maintain.

a. Employee works on several projects during the week and they enter in their time for each of the projects
b. Employee enters in their other total reg, sick, vacation, comp hours, etc
c. It allocates the total reg, sick, vacation, and comp hours based on the top 3 projects they worked on ~~that week~~during a rolling 4 week period immediately preceding the time card week. This would be entered as PW allocate. (Question for Mike: What about if this week is the second week of the two week cycle and should we be looking at the previous week that had not been approved or paid yet? Or should we look at the rolling 4 week period that had been paid?)

Specifications:

Earnings Distribution for PW Allocate

~~There would be a separate program that would run once a week that would populate a~~ new earnings distribution table for PW Allocate (like PS_JOB_EARNS_DIST). It would create the top 3 projects and their percentages for the previous 4 weeks that had been ~~paid for with all~~ worked on by each PW employee~~s~~. This table would then be used as the PW Allocate table to calculate the earnings distribution for sick, vacation, and other leaves when the employee enters in PW Allocation into the laborcode field.

Timecard Allocation

The code would be PW Allocate for those employees in PW. It would be an additional option to the drop down box that currently has the allocate option.

Allocation Based on the top 3 Projects Entered (Ongoing Projects Option)

Timecard Entered

Laborcode		Monday	Tuesday	Wednesday	Thursday	Friday	Calc Allocation
Project 1 laborcode	REG	8		7			none
Project 2 laborcode	REG				1		none

Project 3 laborcode	REG		4		1		none
Project 4 laborcode	REG			1	1		none
Project 5 laborcode	REG				1		none
PW Allocate	VAC		4				
PW Allocate	FHOL				4		
PW Allocate	SIC					8	

Project 1 – would have the actual labor code entered with the 15 hours
Project 2 – would have the actual labor code entered with the 1 hours
Project 3 – would have the actual labor code entered with the 5 hours
Project 4 – would have the actual labor code entered with the 2 hours
Project 5 – would have the actual labor code entered with the 1 hours
Sick – would have the laborcode of PW Allocate, earning code = SIC, and hours entered into dates
Vacation – would have the laborcode of PW Allocate, earning code = VAC, and hours entered into dates
Floating Holiday – would have the laborcode of PW Allocate, earning code = FHOL, and hours entered into dates

PW Allocate Table – top 3 projects

Emplid	Project Code	Total Hours for 4 weeks	Percentage
1234	100-62333-P12345	100	65%
1234	100-64511-P33333	44	29%
1234	100-65888-P23456	10	6%
		154 - total	100% total

Sick Allocation

Laborcode column	Earning code column	Friday Hours column
PW Allocate (Highest)	Sick	5.2 hours
PW Allocate (Second)	Sick	2.32 hours
PW Allocate (Third)	Sick	.48 hours
		8 hours total (may need to round three above to = total)

Vacation Allocation

Laborcode column	Earning code column	Tuesday Hours column
PW Allocate (Highest)	Vacation	2.6 hours
PW Allocate (Second)	Vacation	1.16 hours
PW Allocate (Third)	Vacation	.24 hours
		4 hours total (may need to round three above to = total)

Floating Holiday Allocation

Laborcode column	Earning code column	Thursday Hours column
PW Allocate (Highest)	Floating Holiday	2.6 hours
PW Allocate (Second)	Floating Holiday	1.16 hours
PW Allocate (Third)	Floating Holiday	.24 hours
		4 hours total (may need to round three above to = total)

Group-Allocation

Summary:

This document describes the new Timecard Group level functionality. This functionality allows a Timecard Group (PW in this case) to identify employees that should have their directly charged work-hours allocated for use with leave time. Timecard Groups have the ability to specify employees that are eligible for the allocation setup and usage. An automated process will automatically determine the allocations from the prior 4 weeks of confirmed payroll. This functionality was created by specific request for Public Works, but it is available for any Timecard Group that wishes to use it in the future.

Technical Specifications:

Records:

- LCTC_PRFL_DIST – New record added to maintain the user's accounts and dist-percentage (Kind of like the JOB_EARNS_DIST table).
- LCTC_TG_DEPTID – Modified record to have field LC_USE_ALLC_FLAG (Y/N values).
- LCTC_PRFL_DATA – Modified record to have field LC_USE_ALLC_FLAG (Y/N values)
- LCTC_ACCTC_SRCH – Modified record (view) to display new Grp-Allocate labor-codes for employees that have distributions setup. The labor-code id is a concatenation of LC_TMCD_GROUP and the word "ALLOCATE". Thus, PW employees will see "PW-ALLOCATE" as their selection. If other groups wish to participate in usage of this functionality, such as IT, then IT employees would see "IT-ALLOCATE".

Pages:

- LCTC_PRFL_SETUP – Modified page to have new LC_USE_ALL_FLAG control and added Level 2 grid (LCTC_PRFL_DIST) for manual user specification of allocations (for new emps, etc).
- LCTC_TMCD_GROUP – Added new LC_USE_ALLC_FLAG control to page on Level 1 – LCTC_TG_DEPTID grid.

Components:

- LCTC_ALLC_UD – New component serving as run-control for running the LCTC_ALLC_UD application engine process.

Application Engine:

- LCTC_ALLC_UD – New Application Engine that is used to automatically update/insert LCTC_PRFL_DIST records. These records are derived from the last 2 confirmed payrolls data.

Application Engine Specific Logic:

The processor selects every employee that is actively setup for Group-allocation. Each employee is then processed one-by-one to see how many worked-hours they had in the last 2 pay-periods. If their worked hours are greater than or equal to 20, their allocations are calculated.

Their new allocation-distributions are recorded in the LCTC_PRFL_DIST table with a new effective-date of the day after the pay-end-date of the last payroll run processed (i.e. the PAY_END_DT was 1/31/07, the new EFFDT would be 2/1/07). If any entries in LCTC_PRFL_DIST are found with effective-dates later than this date, then they are updated to be the same as the new distribution amounts. A new effective dated entry is also written into LCTC_PRFL_DATA, as LCTC_PRFL_DIST is a child record of this table.

If an employee does not qualify as having at least 20 worked hours, their records are skipped, and the department can enter/maintain their allocations manually.

Assumptions:

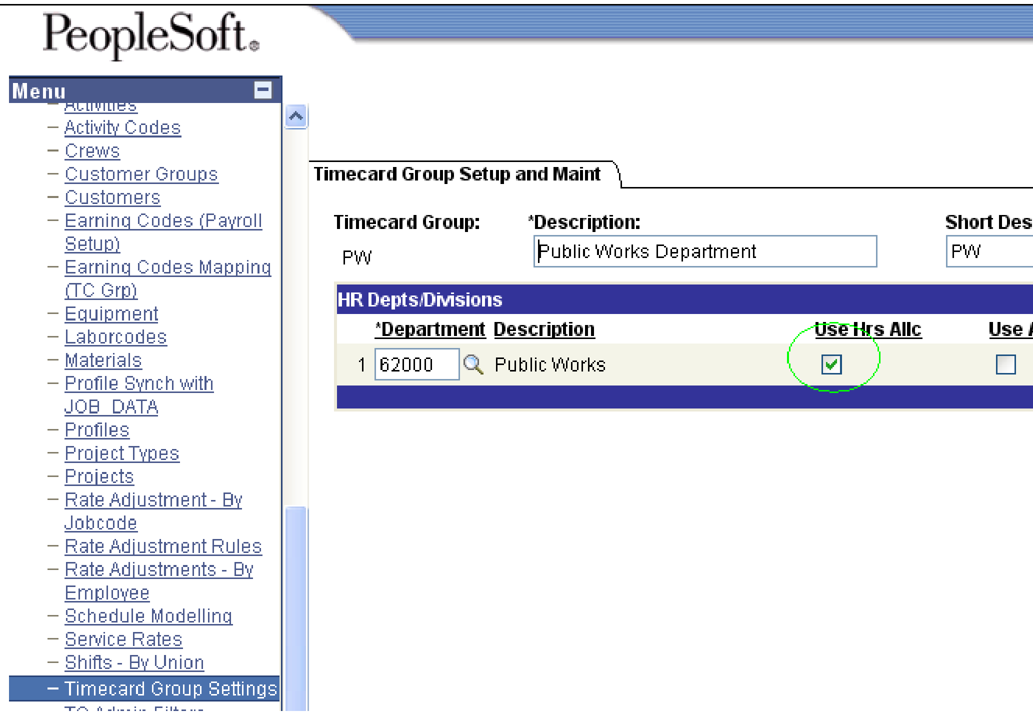
- The “Group Allocate” labor-code selection will only be used on non-worked time.

Usage Instructions:

Identifying employees that are participating in Group-allocation can be accomplished in 2 different ways:

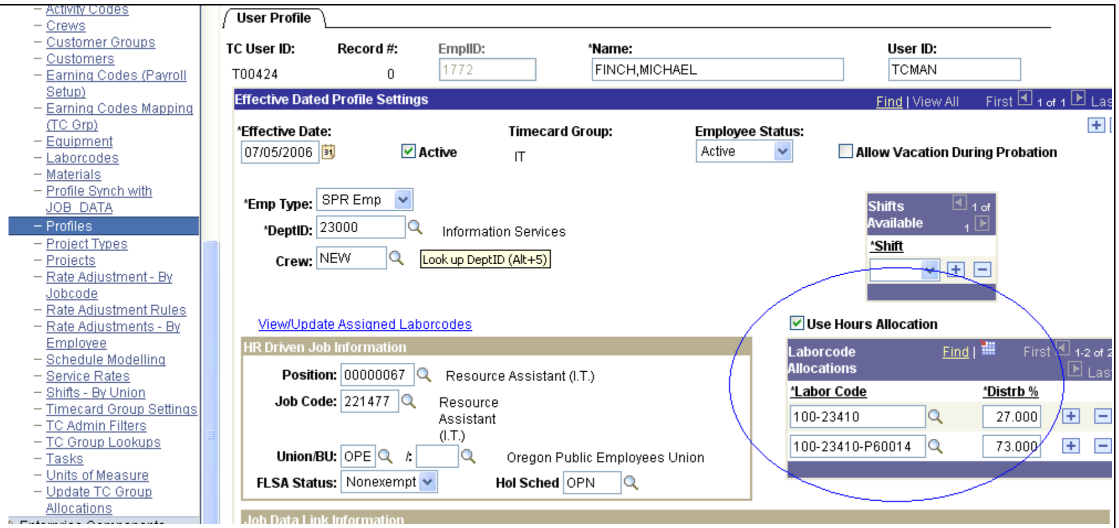
Batch identification -

1. Navigate to SetupHRMS -> SPR Timecard Setups -> Timecard Group Settings
2. Select the "Use Hrs Allc" checkbox in the division settings area to identify an entire division that will use the allocations.



Individual identification – (The allocation area is still updated even if division(batch) setting is used)

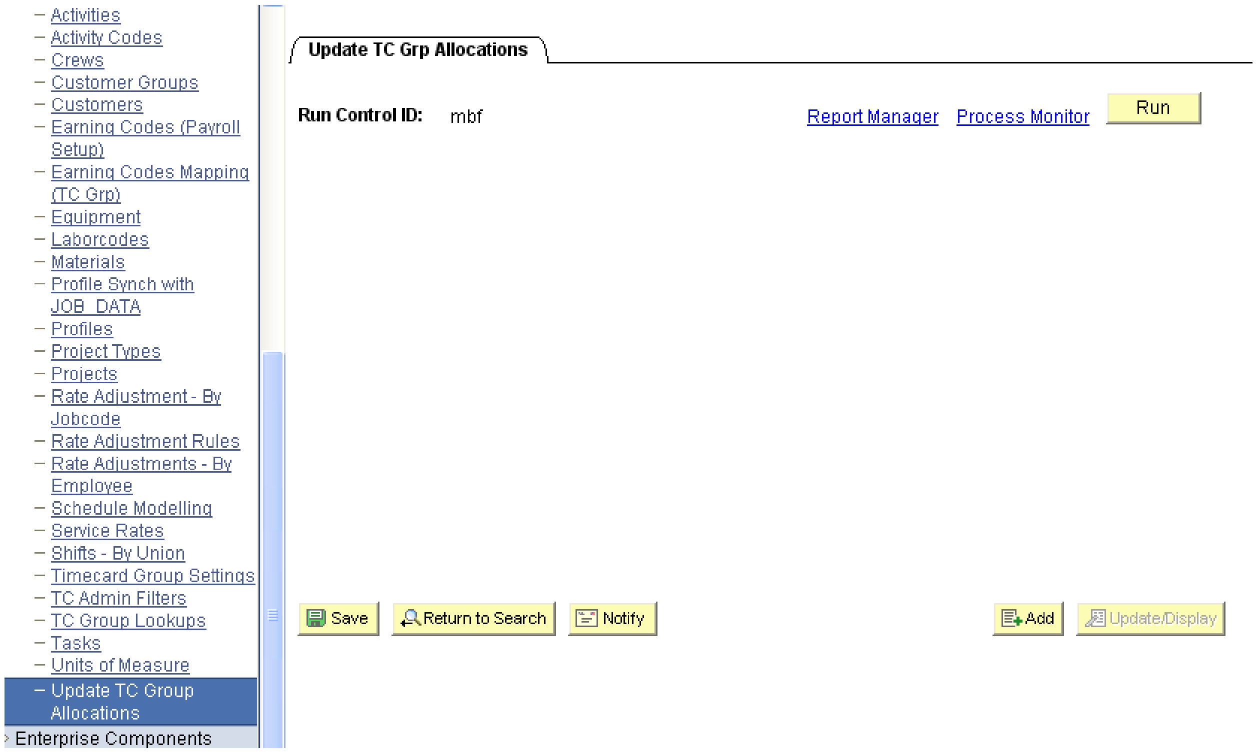
1. Navigate to SetupHRMS -> SPR Timecard Setups -> Timecard Group Settings
2. Select the “Use Hours Allocation” checkbox in the division settings area to identify an entire division that will use the allocations.
3. If the employee is selected for allocation use using the division (batch method) above, you still use the allocation grid to distribute hours manually.



Running the allocation-update processor

Navigate to Setup HRMS -> SPR Timecard Setup -> Update TC Group Allocations

Run the process (There are no run-control settings)


Activities
Activity Codes
Crews
Customer Groups
Customers
Earning Codes (Payroll Setup)
Earning Codes Mapping (TC Grp)
Equipment
Laborcodes
Materials
Profile Synch with JOB_DATA
Profiles
Project Types
Projects
Rate Adjustment - By Jobcode
Rate Adjustment Rules
Rate Adjustments - By Employee
Schedule Modelling
Service Rates
Shifts - By Union
Timecard Group Settings
TC Admin Filters
TC Group Lookups
Tasks
Units of Measure
Update TC Group Allocations
Enterprise Components
Update TC Grp Allocations
Run Control ID:
mbf
Report Manager
Process Monitor
Run
Save
Return to Search
Notify
Add
Update/Display