Cayenta
Connect Time Manager
HCTC 2017

Connect
TIME MANAGER

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Introduction

Cayenta has made many updates to the Time Entry system which allows for an updated design as well as updates to the forms to allow for easy entry of data.

For example, Cayenta has updated the Timesheet Entry and Planned Leave Request Entry forms to be combined into one form. This new form layout allows for employees to easily toggle between their timesheets and their planned leave requests.

We have also combined the approval forms for timesheets and planned leave requests into one form to allow approvers to easily toggle between the 2 approvals.

This document is going to take you through the different forms of the Time Entry subsystem to discuss how to update these forms as well as changes that have been made to the forms and how they function.

Time Entry Setup

Pay Type Maintenance

Pay Type Maintenance, or Earning Code Maintenance in previous versions on Time Entry, allows you to create user-friendly pay types for your employees to use when entering their time in Time Entry.

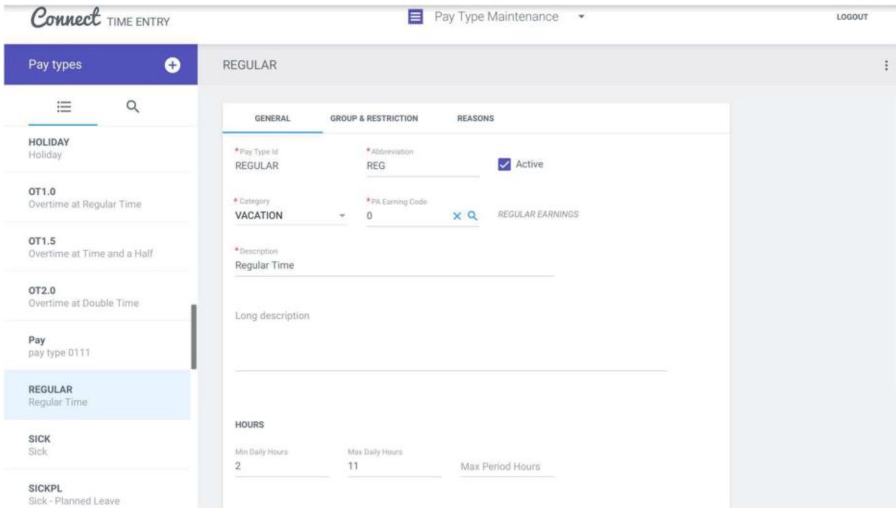

Figure 1 - Pay Type Maintenance displaying example of a Time Entry pay type.

Create a New Pay Type

In this exercise, we will review the steps in adding a new Pay Type.

- From the Connect Time Entry home page, in the *Settings* section, click Pay Type Maintenance.
- In the Pay Type list on the left, click the *Add* button.
- In the form that appears, there are 3 different pages – *General*, *Group & Restriction*, and *Reasons*.

General

Under the *General* page, enter the appropriate information into the following fields:

- **Pay Type Id -** Mandatory field, Unique (Lookup Pay Types). Alphanumeric code. This will be the ID for pay types that employees will see in Time Entry.
- **Abbreviation -** Mandatory field, Short Description of the Earning Code. Maximum length: 5 characters.
- **Category -** Drop-down menu. Has a separate maintenance form. Defines the type of Pay Codes. In order to use Planned Leave, the Category “LEAVE” needs to be selected. “NON-EARNING” does not carry forward to the Payroll Upload. Drop down list is not user definable.
- **PA Earning Code –** The numeric earning code that is setup in Payroll for the Pay Type being created in Time Entry should be entered in this field. For example, if Regular Time in Payroll = ‘0’, then ‘0’ should be entered in this field on the Regular pay type in Time Entry.
- **Description -** Mandatory field. Free form text. Maximum length: 40 characters. Description of the earning code.
- **Long Description –** Free form text. Description of the earning code.

- **Comments Required –** Check this box to make it mandatory for the employee to enter comments for certain earning codes when doing Time Entry.

Hours:

- **Min Daily Hours -** Determines the minimum number of hours that can be posted for this Earning Code for one employee for any specific day.
- **Max Daily Hours -** Determines the maximum number of hours that can be posted for this Earning Code for one employee for any specific day.
- **Maximum Period Hours -** Determines the maximum number of period hours that can be posted for this Earning Code for one employee for a specific period.
- **Maximum Event Hours -**
- **Maximum Schedule Period Hours -**

Display:

- **Sort Sequence –** This is a numeric field that is used to determine the sort of the earning codes in the Timesheet Entry or Planned Leave Request Entry Pay Type dropdowns.
- **Crew Card Column –** This is a numeric field that is used to determine the order in which the earning codes on the Crew Time Entry form display.

Group & Restriction

Under the *Group & Restriction* page, enter the appropriate information into the following fields:
Employee Groups Exclusivity:

- Add Group: In the dropdown menu that appears, add a group that has been entered into the system.

Restrictions:

- Check the appropriate boxes:
  - Comments required – Checking this box makes comments required for the pay type. This will force employees to enter comments on the entry when they are posting time against this pay type.
  - Employee entered - indicates if employees are allowed to enter leave (for themselves) with this Pay Type
  - Reason required – indicates if a reason code is required when entering Leave using this Pay Type.
  - Automatically approved – indicates the MLA entry should be automatically approved when entering Leave using this Pay Type
  - Attachment required – indicates if an attachment is required when entering Leave using this Pay Type.

Reasons

Under the Reasons page, click ‘Add’ and enter the appropriate information into the following fields:

- **Code – free form text**
- **Description – free form text**

- Click ‘Save’.

Deleting an Existing Pay Type

In this exercise, we will review the steps in deleting a Pay Type.

- From the Connect Time Entry home page, in the *Settings* section, click Pay Type Maintenance.
- In the Pay Type list on the left, click the name of an existing Pay Type that you wish to delete.
- In the form that appears, on the right-hand side of the page, click the *Vertical Ellipsis*.
- Click *Delete* to delete the Pay Type.

Shift Calendar Maintenance

The Shift Calendar Maintenance form defines the type of shift that users will see when they open their timesheet in Timesheet Entry.

The Shift Code Maintenance form also includes:

- Effective Start and End Dates for the shift.
- Days On/Off.
- Standard Earning Code and Hours for each individual day in the shift cycle.

The shift code is attached at the unit level but can also be overwritten at the employee level should there be an employee in the unit who follows a different shift cycle.

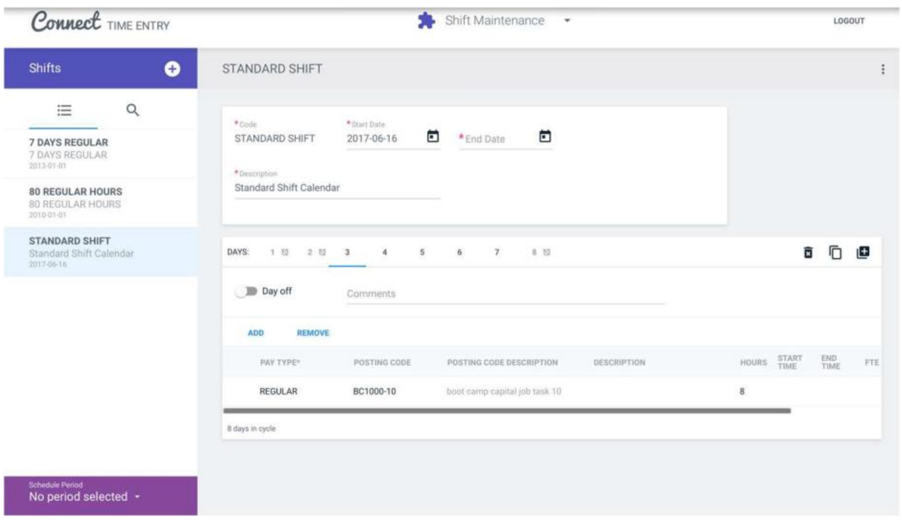

Figure 2 - Shift Calendar Maintenance displaying example of a Time Entry shift calendar.

Create a New Shift

In this exercise, we will review the steps in adding a new Shift and dates within the Shift.

- From the Connect Time Entry home page, in the *Settings* section, click Shift Maintenance.
- In the Shift list on the left, click the *Add* button.
- Enter the appropriate information into the following fields:
    - **Code -** Alphanumeric code value. This is the name of the Shift Calendar.
    - **Start Date -** Allows restriction so that earlier time cannot be entered (might be useful for restricting temporary employees to narrow range of dates).
    - **End Date -** Allows restriction so that later time cannot be entered. Useful if employee is no longer active while allowing record to stay on file so it can be reactivated (e.g. for seasonal employees).
    - **Description -** Free form text. Maximum length: 40 characters. Description of the shift calendar.
    - **Days –** Represents the amount of days that are currently in the shift calendar. The amount of days added here will determine how many days will default on the timesheet for the employee.

- **Day Off –** When this is switched 'On' on any given day listed in the shift, these days will be marked as non-working days on the employee's timesheet.
- **Comments –** Allows for a comment to be added for custom shifts.
- **Pay Type –** After selecting the 'Add' button on a working day, use the Pay Type lookup to search for a pay type that you want to enter on the shift. The pay types entered here will default onto the employee's timesheet. Note: pay types must be entered on all days in the shift. This allows for the possibility of defaulting different pay types onto a shift across different days, if necessary.
- **Posting Code –** Use the Posting Code lookup to search for a Distribution Code, Work Order, or Job Code to enter on the shift. The posting codes entered here will default onto the employee's timesheet. Note: posting codes must be entered on all days in the shift. This allows for the possibility of defaulting different posting codes onto a shift across different days, if necessary.
- **Posting Code Description –** This is a non-modifiable field that will automatically populate based on the Distribution Code, Work Order, or Job Code that is entered in the Posting Code field.
- **Hours –** Enter in hours for the pay types that you want to enter onto the shift. The hours entered in this field will default onto the employee's timesheet. This can cut down on the time that employee's need to spend entering time if their hours are already pre-populated for them. Note: hours must be entered on all days in the shift. This allows for the possibility of defaulting different hours onto a shift across different pay types, if necessary.
- **Start Time** – Start time of the shift. Allows the default time entries to be used to define a schedule for the day.
- **End Time** – End time of the shift**.** Allows the default time entries to be used to define a schedule for the day.
- **FTE – Categorized for FTE Calculation.** Absence Entry and other processes interpret the times an employee has worked or absent as an FTE representation.
- **Working –** Allow you to define working and non-working times of the day. This allows a full daily schedule to be defined that includes breaks.

- Click 'Save'.

Add a Row to an Existing Shift

- Under the *Add a New Shift* section, click 'Add'.
- Enter the appropriate information into the following fields (see descriptions in the section above for 'Create a New Shift'):
    - **Pay Type**
    - **Posting Code**
    - **Description**
    - **Hours**
    - **Start Time**
    - **End Time**
    - **FTE**
    - **Working**
- Add any additional comments in the Comments field.
- Click the *Copy* button to duplicate the day you added and add it to the day cycle.

- Click 'Save'.

Deleting a Shift

In this exercise, we will review the steps in deleting a Shift.

- From the Connect Time Entry home page, in the *Settings* section, click Shift Maintenance.
- In the Shift list on the left, click the name of an existing Shift that you wish to delete.
- In the form that appears, on the right-hand side of the page, click the *Vertical Ellipsis*.
- Click *Delete* to delete the Shift.

Calendar Maintenance

Calendar Maintenance, previously known as Holiday Maintenance, has been updated to allow the entry of holiday dates and regular non-working days into a calendar.

These calendars will still work in the same way they did previously where any earning codes, posting codes, or hours entered will be automatically added to the timesheet for employees using the calendar.

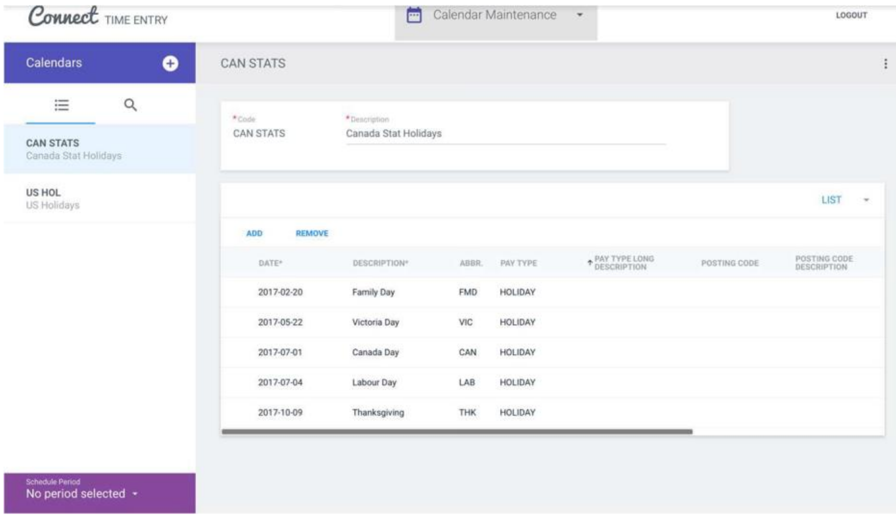

Figure 3 - Calendar Maintenance displaying example of a Time Entry calendar.

Create a New Calendar

In this exercise, we will review the steps in adding a new Calendar and dates within the Calendar.

- From the Connect Time Entry home page, in the *Settings* section, click Calendar Maintenance.
- In the Calendar list on the left, click the *Add* button.
- In the form that appears, in the Code field, enter a Calendar Code.
    - **Code –** Mandatory. This is the code name for the calendar.
    - **Description –** Mandatory. This is a description field for the calendar.
    - **Date –** Mandatory. Click in the date field and either select the calendar button to select a date from the calendar, or enter a date in the format YYYY-MM-DD. This is the date of the holiday or non-working day.
    - **Description –** Mandatory. This is the description of the Calendar date (Holiday, Pro D-Day, etc.).
    - **Abbr. –** Optional abbreviation for the holiday for calendar date.
    - **Pay Type -** Alphanumeric code; use lookup to select the earning code that should be entered onto the timesheet for the employee on the specified calendar date. The pay type entered here for the calendar date will be defaulted onto the employee's timesheet when this date comes up in the shift.
    - **Pay Type Description –** This is a non-modifiable field which will auto-populate based on the pay type that is chosen.

    - **Posting Code -** Optional. This becomes the default posting code on the time entry screen when this holiday overrides the standard shift definition.
    - **Posting Code Description –** This is a non-modifiable field which will auto-populate based on the posting code that is chosen.
    - **Hours –** Numeric value that will be entered onto the timesheet for this date. Typically, the hours entered here is the same as what is already defaulted onto the shift calendar.
    - **Start Time -** Optional. Memo field to record normal starting time.
    - **End Time -** Optional. Memo field to record normal ending time.
    - **Non Working -** By checking this checkbox, the employee will not be scheduled to work.
- Click 'Save'.

Add New Calendar Dates

In this exercise, we will review the steps in adding new Calendar dates to the saved Calendar.

- In the list of Calendars, click the name of the Calendar you saved.
- Under the Calendar Code, click 'Add'.
- Fill in the following fields (see descriptions in the section above for 'Create a New Calendar'):
    - **Date**
    - **Description**
    - **Abbr.**
    - **Pay Type**
    - **Posting Code**
    - **Hours**
    - **Start Time**
    - **End Time**
    - **Non Working**
- Click 'Save'.

Add Dates to an Existing Calendar

In this exercise, we will review the steps in adding dates within the Calendar.

- From the Connect Time Entry home page, in the *Settings* section, click Calendar Maintenance.
- In the Calendar list on the left, click the name of an existing Calendar.
- In the form that appears, in the Code field, enter a Calendar Code.
- In the Description field, enter a Calendar Description.
- Click 'Save'.

Deleting a Calendar

In this exercise, we will review the steps in deleting a Calendar.

- From the Connect Time Entry home page, in the *Settings* section, click Calendar Maintenance.
- In the Calendar list on the left, click the name of an existing Calendar that you wish to delete.

- In the form that appears, on the right-hand side of the page, click the *Vertical Ellipsis*.
- Click *Delete* to delete the Calendar.

Schedule Period Maintenance

A defined period of time used to control scheduling of Shifts and Calendars. For example, in the Schools industry a School Year would be represented as a Schedule Period.

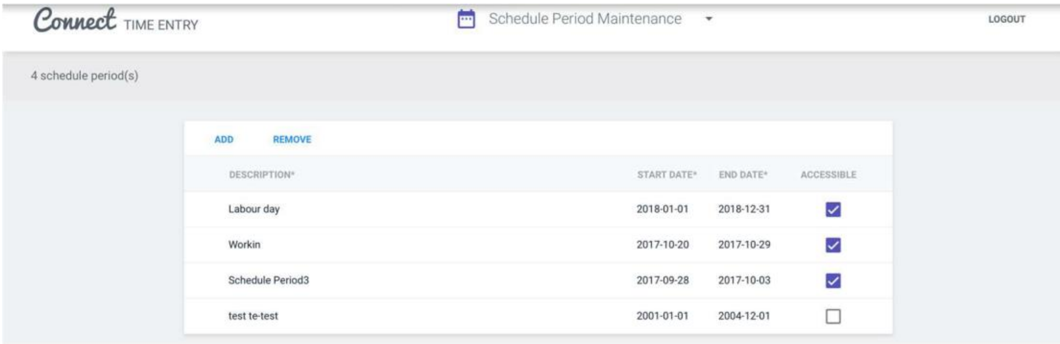

Figure 4 - Schedule Period Maintenance example.

Create a New Schedule Period

In this exercise, we will review the steps in adding a new Schedule Period.

- From the Connect Time Entry home page, in the *Settings* section, click Schedule Period Maintenance.
- In the Schedule Period list, click 'Add'.
- Enter the appropriate information into the following fields:
  - **Description -** Free form text. Maximum length: 250 characters.
  - **Start Date -** Allows restriction so that earlier time cannot be entered (might be useful for restricting temporary employees to narrow range of dates).
  - **End Date -** Allows restriction so that later time cannot be entered. Useful if employee is no longer active and allows record to stay on file so it can be reactivated (e.g. for seasonal employees).
  - **Accessible -** Check this box to allow the schedule to be accessed.
- Click 'Add'.

Removing a Schedule Period

In this exercise, we will review the steps in removing a Schedule Period.

- From the Connect Time Entry home page, in the *Settings* section, click Schedule Period Maintenance.
- In the Schedule Period list, click the name of an existing Schedule Period that you wish to delete.
- Click 'Remove' to delete the Calendar.

Unit Maintenance

The Unit Maintenance form defines the groupings in which employees can be placed within the Time Entry Module. Typically, we will group employee's together by like earning codes, shifts, holidays, and supervisors.

Other criteria to determine groupings is the definition of the approval patch or Multi Level Approval. This is often the same as the Departmental or Sub-Departmental structure.

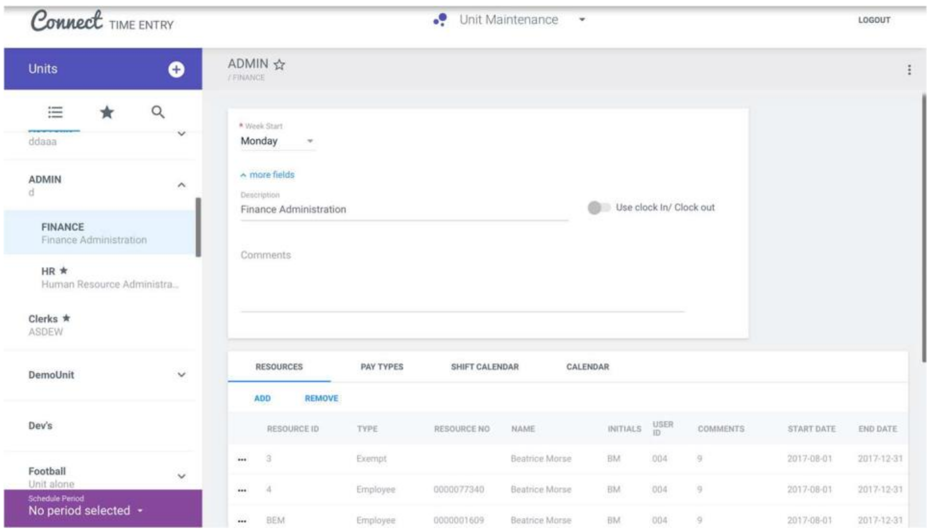

Figure 5 - Unit Maintenance displaying example of Time Entry Unit/Subunit.

Creating a New Unit

In this exercise, we will review the steps in adding a new Unit.

- From the Connect Time Entry home page, in the *Settings* section, click Unit Maintenance.
- In the Category list on the left, click the *Add* button.
- Enter the appropriate information into the following fields:
  - **Unit -** Highest level grouping mechanism. Expect that this will usually correspond to a Department.
  - **Subunit -** Expect that this will usually correspond to a Sub Department. There is not a hierarchical relationship between Unit and Sub Unit – e.g. Earning Codes defined at the Unit level do not automatically become available to the Sub Unit.
  - **Start Date -** This controls the employee's ability to enter time sheets for a date.
  - **End Date -** Controls the employee's ability to enter time sheets for a date; currently, end date is required to be set to 9999-12-31 or some other date that is far in the future unless it is predetermined that an employee will be leaving at a specific date.
  - **Comments -** Free form text. Maximum characters: 250.

More Fields:

  - **Description -** Free form text. Maximum length: 40 characters.
  - **Comments -** Free form text. Maximum length: 250 characters.
- Click 'Save'.

In the section below, there are 4 subpages: *Resources*, *Pay Types*, *Shift Calendar*, and *Calendar*.

Adding a Resource

This tab will show you the list of employees that are assigned to the Unit. If your Employee Maintenance setup is already complete, you can link the employees to their units here.

- In the *Resources* subpage, click 'Add' to bring up the Add Record page and enter the appropriate information. Please see Resource Maintenance for fields and descriptions in the next section below.

Adding a Pay Type

Pay Types in Time Entry are also known as Earning Codes. Enter any earning codes that the unit/sub unit is able to post time towards in Timesheet Entry. Codes that are setup here will be the only earning codes that employees will be able to access in Timesheet Entry or the Planned Leave Request screens.

Note: even though the LEAVE type codes are given to the unit/sub unit, they will only see these codes in the Planned Leave Request screen. They will not be able to use these codes through the Timesheet Entry screen. The only time they will be seen in the Timesheet Entry screen is when an approved planned leave request is populated.

- On the *Pay Types* subpage, click to bring up the Add Record page and enter the appropriate information. Please see Pay Type Maintenance in the first section for fields and descriptions.

Adding a Shift Calendar

This is where we will define what shift calendar the unit will follow. To assign a shift calendar, use the dropdown on the tab to select the appropriate shift cycle for the unit and save the screen.

- On the *Shift Calendar* subpage, click Shiftcode to bring up a list of Shiftcodes that have been entered into the system and select the appropriate one.

Adding a Calendar

This is where we will define what calendar the unit will follow. To assign a holiday calendar, use the dropdown on the tab to select the appropriate holiday calendar for the unit and save the screen.

- On the *Calendar* subpage, click Calendar to bring up a list of Calendars that have been entered into the system and select the appropriate one.
- Click 'Save'.

Deleting a Unit

In this exercise, we will review the steps in deleting a Unit.

- From the Connect Time Entry home page, in the *Settings* section, click Unit Maintenance.
- In the Category list on the left, click the name of an existing Unit that you wish to delete. In the form that appears, on the right-hand side of the page, click the *Vertical Ellipsi*s.
- Click *Delete* to delete the Unit.

Resource Maintenance

Time Entry uses its own employee identification codes to uniquely identify each employee in the Time Entry Subsystem. For each employee, the Unit/Sub Unit the employee belongs to is defined, along with the payroll employee number this record represents.

The Payroll Employee No is optional so that "employees" who do not get paid (co-op students, volunteers, etc.) but time still needs to be tracked, can enter their time through Timesheet Entry.

The shift and calendar codes can be overwritten at the employee level as well, if these codes differ from the unit that they belong.

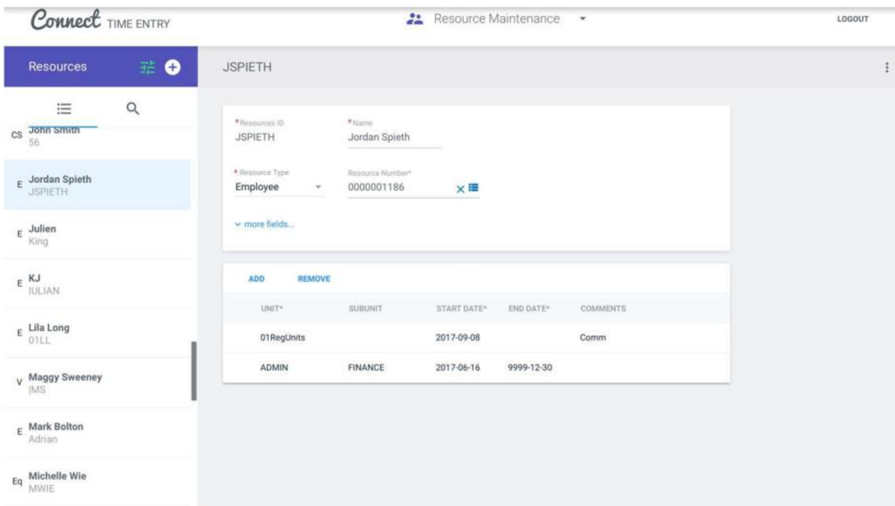

Figure 6 - Resource Maintenance displaying example of Time Entry resource.

Create a New Resource

In this exercise, we will review the steps in adding a new Resource and units within the resource.

- From the Connect Time Entry home page, in the *Settings* section, click Resource Maintenance.
- In the Resource list on the left, click the *Add* button.
- Enter the appropriate information into the following fields:
  - **Resource ID -** Alphanumeric employee identification. Some clients may choose to make this the same as the numeric PA employee number; some may choose to use employee short name or initials.
  - **Resource No -** The employee's payroll employee number; will be numeric and validated to the Cayenta Payroll subsystem, displayed using the formatting rules defined there. This can be a maximum of 10 digits in length.
  - **Name -** Employee name to be used on screens or reports in Time Entry system.
  - **Initial -** Free form text. Maximum length: 3 characters.
  - **User ID -** Login User ID associated with the employee (3-digit User ID from User Maintenance).
  - **Type** - Identifies if the employee is a real paid employee or is someone who needs to track time but is not in the payroll system. E.g. sometimes it is necessary to track hours

worked by a volunteer or someone working an unpaid student term such as a co-op student. Drop down list is not user definable.
    - **Start Date -** Controls the employee's ability to enter time sheets for a date.
    - **End Date -** Controls the employee's ability to enter time sheets for a date; currently, end date is required to be set to 9999-12-31 or some other date that is far in the future unless it is predetermined that an employee will be leaving at a specific date.
    - **Comments -** Free form text. Maximum length: 250 characters.
- Click 'Save'.

Add a Unit to Resource

- From the Add a New Resource page, click 'Add' to add a unit to an existing resource.
- Enter the appropriate information into the following fields:

Deleting a Resource

In this exercise, we will review the steps in deleting a Resource.

- From the Connect Time Entry home page, in the *Settings* section, click Resource Maintenance.
- In the Resource list on the left, click the name of an existing Resource that you wish to delete.
- In the form that appears, on the right-hand side of the page, click the *Vertical Ellipsis*.
- Click *Delete* to delete the Resource.

Timekeeper Maintenance

Timekeeper Maintenance allows you to determine the timekeeper access by User Id and Unit/Subunit. This allows us to restrict whose timesheets any given user is able to see through Timesheet Entry and Planned Leave Request entry.

User can have multiple timekeeper records should they have the ability to access timesheets across multiple units.

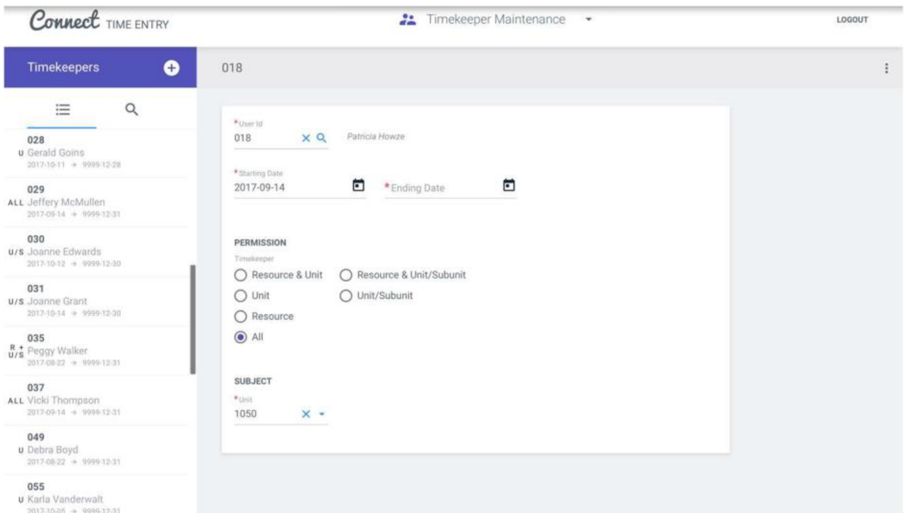

Figure 7 - Timekeeper Maintenance displaying example of Time Entry timekeeper.

Creating a New Timekeeper Record

In this exercise, we will review the steps in adding a new Timekeeper record.

- From the Connect Time Entry home page, in the *Settings* section, click Timekeeper Maintenance.
- In the Timekeeper list on the left, click the *Add* button.
- Enter the appropriate information into the following fields:
  - **User ID –** Login User ID associated with the employee (3-digit User ID from User Maintenance).
  - **Starting Date –** Start date of the record.
  - **Ending Date –** Start date of the record.
  - **Permission –** Check the appropriate timekeeper option for the employee.
    1. **Resource & Unit**
    2. **Resource & Unit/Subunit**
    3. **Unit**
    4. **Unit/Subunit**
    5. **Resource**
    6. **All**
- **Subject –** This section will open up to show required information based on the Permission selection.

Deleting a Timekeeper Record

In this exercise, we will review the steps in deleting a Timekeeper record.

- From the Connect Time Entry home page, in the *Settings* section, click Timekeeper Maintenance.
- In the Timekeeper list on the left, click the existing Timekeeper record that you wish to delete.
- In the form that appears, on the right-hand side of the page, click the *Vertical Ellipsis*.
- Click *Delete* to delete the Resource.

Time Entry Processing

Planned Leave Request Entry

Planned Leave gives employees the ability to submit or withdraw any types of leave requests they can take, electronically.

The types of earning codes that they can use to submit requests through the Planned Leave screens is determined on Unit or Resource Maintenance. Any code with a LEAVE Type, users will be able to enter time for through Planned Leave.

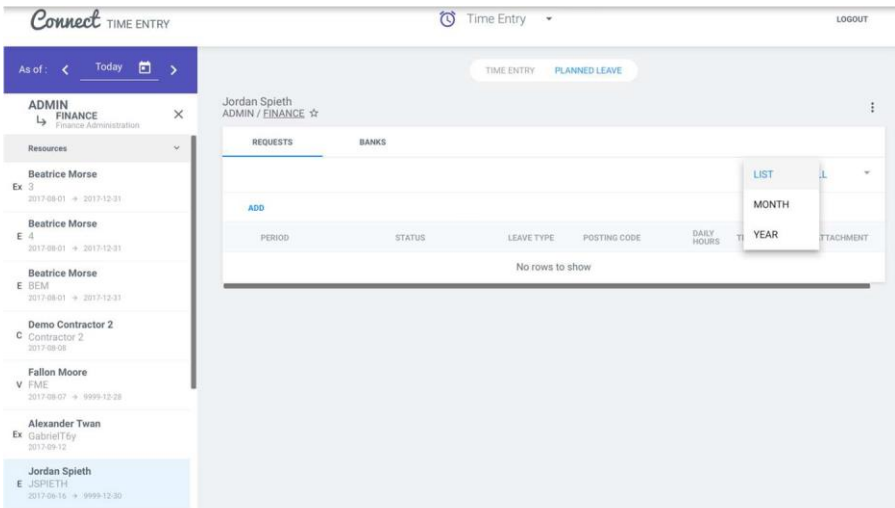

Figure 8 - Planned Leave Request Entry displaying entry form for an employee. Dropdown allows you to choose how to view requests.

To Submit a New Planned Leave Request

- From the Connect Time Entry home page, in the *Settings* section, click Time Entry.
    - The user's timekeeper access will determine what and who's timesheets they are able to see when they click into Time Entry.
- When an employee selects their timesheet, select the 'Planned Leave' heading.
- On the 'Requests' tab, click the 'Add' button and the request form opens.
- Enter any applicable information for the planned leave request and click 'Create' and the request is entered as a line item on the 'Requests' tab. Click 'Submit' to submit the request.

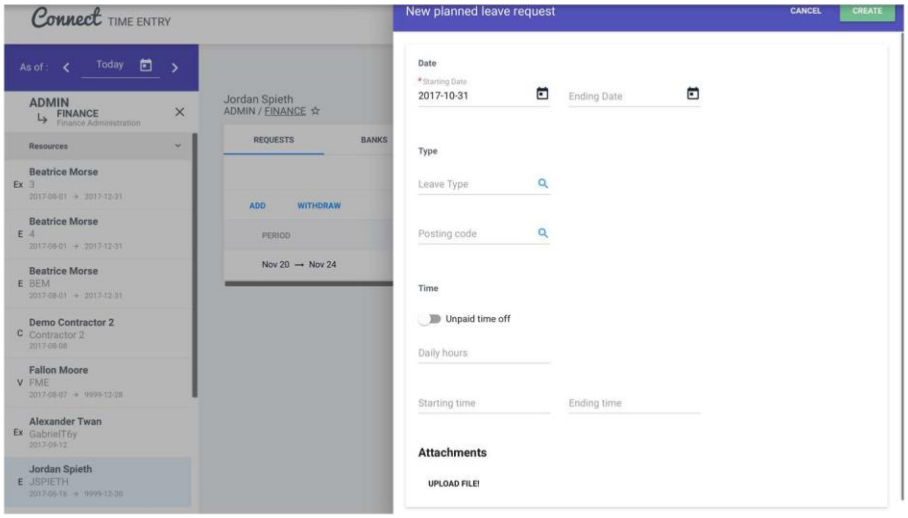

Figure 9 - Planned Leave Entry popup box which opens after employee select 'Add' on the Planned Leave Entry form.

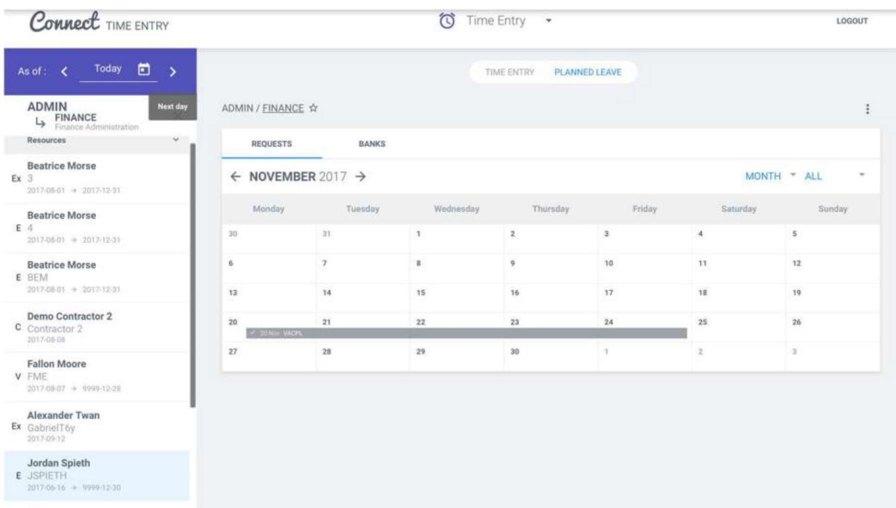

Figure 10 - Planned Leave Month view shows employee their planned leave requests in a calendar view. Employee can use arrows to move backwards and forwards across months.

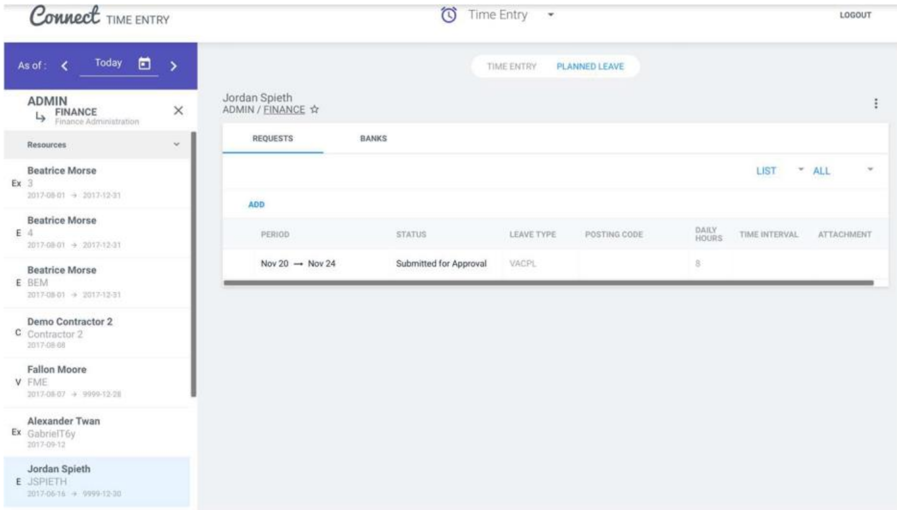

Figure 11 - Example of submitted planned leave request.

Withdrawing a Planned Leave Request

The withdraw feature through the planned leave request screen allows for employees to remove their planed leave request, should they end up not taking that time off.

- From the Connect Time Entry home page, in the *Settings* section, click Time Entry.
  - The user's timekeeper access will determine what and who's timesheets they are able to see when they click into Time Entry.
- When an employee selects their timesheet, select the 'Planned Leave' heading.
- Click the 'Withdraw' button and left column opens with checkboxes to select requests to be withdrawn.
- After determining which request to be withdrawn, click the checkmark and then 'Submit'.
- Withdraw request is submitted for approval.

Absence Management

What is an Absence? A timesheet entry where an employee record's a non-work-related pay type on a regularly scheduled workday. Absences may be paid or unpaid, depending on the reason for the absence. An absence follows the same approval rules as other time entries for the employee.

Shifts and Calendars - Overview

- Calendars will define Statutory Holidays and other non-working days for various employee groups.
  - These dates restrict employees assigned to the calendar from being able to log absences that fall on calendar dates.
- Shifts define the default working schedule for an employee.
  - Shifts can be custom or defined at a Location level.
- Statutory Holiday entries are observed across all schools/locations/departments in an organization.
- Shifts are defined within a fiscal year, rather than a calendar year.
- Individual employees may have separate shift schedules defined for a given school year.
- Location-based shifts and schedules will be available.

Absence Reasons - Overview

- Absence Reason Codes indicate the reason for the employee's absence.
  - Based on the reason chosen, the employee may be considered working or non-working.
- Absence Reason Codes may be limited to specific employee groups based on union/bargaining unit/local agreements.
- Absence Reason Codes support leave descriptions and data collection, to support union/bargaining unit/local requirements.
- Absence Reason Codes will also ensure specific employees' time bank(s) are deducted/awarded for the appropriate Earnings Code within the appropriate payroll.
  - Based on the Absence Reason selected for an absence, absent employees may be entitled to the absence with annual maximums (example: 24 hours of compassionate care leave per year).
  - Based on the Absence Reason, absent employees may be entitled to the absence with a maximum for each occurrence (example: 40hrs of bereavement leave for a personal loss).

Locations - Overview

- A list of available Locations (e.g. schools, buildings, departments, etc.) will be made available within Employee Assignment records in Cayenta.
  - A single location can be applied to an Employee Assignment.
- Location shift schedules can be applied to employees who work at a particular location to provide a foundation for their absence schedule and dispatched replacement schedule.
- Absence, planned leaves, and dispatched replacement records will be location specific.

- Reporting of absences / planned leaves by location will be available.

Positions & Assignments - Overview

- Employees are assigned a Position Code via their Assignment(s) in Cayenta.
- Both regular FT & PT employees will receive active Assignments and a regular Position code within each Assignment.
- Replacement employees will receive active Assignments and a replacement Position code within each assignment.
- A series of Replaceable Position Codes may be defined for a regular Position Code. This expresses that employees with this Position Code may replace employees with a replaceable Position Code.
- A Replacement Employee receives different pay rates based on the length of time they are replacing in a position.
- The system should provide the ability to indicate if a Position Code is a replacement position.

Leave Entry - Overview

- The system allows specific Leave Types/Absence Reasons to have their own custom Leave Forms where the text displayed can include collective bargaining agreement language for each unionized or non-unionized employee group.
- Custom Leave Forms can contain custom drop-down menu choices for recording data for each Leave Type/Absence Reason (Example: Relationship allows choices of Son, Daughter, Mother, Father, etc.)
- Submitted planned leaves will undergo the Leave Approval process, which will utilize Multi-Level Approval (MLA) functionality available in Cayenta to route employee leave requests to the appropriate supervisor or other individual(s).
- Employees submitting planned leave requests will receive email notification of approvals/denials.

Replacement Qualifications - Overview

- The system should provide the ability for a Cayenta HR user to record the qualifications in which a replacement employee should perform when replacing a regular employee for an absence.
- Replacement employees can also function as part-time regular employees, and therefore hold a regular position.
    - The dates and times in which they are scheduled to work their regular job are dates and times in which they cannot work as a replacement employee.
- Specific replacement employees can be requested to replace specific absent employees.
- Replacement employees will be provided the following info when scheduled to work a dispatch job:
    - Dispatch date(s)
    - Dispatch Start Time
    - Dispatch End Time
    - Break time(s)

- Location Name
- Position Description
- Absent Employee Name.

Replacement Book Off - Overview

- The system should provide the ability for a timekeeper or replacement employee to record future dates and times in which the replacement employee is unavailable for replacement work. These are referred to as Book-Off records.
  - Employees should be able to be log an unlimited number of Book-Off records.
  - Employees should not be able to be log Book-Off records for past dates.
  - Employees should not be able to Book-Off during time periods where the employee has Leave Requests or Replacement Entries.
  - Book-Off records do not require approval.
  - Employees may be able to withdraw Book-Off records.
  - Book-Off records will be used by the Dispatch Job Board (DJB) to determine availability of an employee for dispatch work.

Dispatch Integration - Overview

- Absent employees may require a replacement employee to work in their position during the duration of their absence.

- The Dispatch Board (DJB) is a browser-based job board system available in Connect Employees website to offer dispatch jobs to qualified / unqualified individuals.

  - Replacement employees will click Accept or Refuse for any dispatch job they are offered.

- SFE (SmartFind Express) is an automated dispatch system that Cayenta will interface with to provide employees the ability to log absences on a SFE website and have the accepted dispatch job offer data for replacement employees uploaded to Cayenta.

- Cayenta to SFE and SFE to Cayenta interfaces will be developed to support the exchange of data between the 2 systems.

- A replacement employee may be assigned a position/assignment as a substitute teacher, part-time teacher who acts as a substitute teacher, casual relief worker, or part-time support worker.

- The list of Preferred Replacement employees offered a dispatch job may or may not be at the requester’s discretion, and may be based on seniority rules.

- If no fully qualified replacement employees are available, then replacement employees that partially meet the requirements may be assigned.

- The purpose of the Dispatch Job Board is to:

- For absences requiring a replacement, fill dispatch jobs with a single replacement employee so that location/school or central staff are not required to fill them, thereby saving time.

Timesheet Entry

This is the form employees will go to submit their time.

Any defaults that are coming from the shift calendar or (holiday) calendar will populate on the timesheet for employees. These defaults allow for employees to quickly review and submit their timesheets.

Adding a New Row to the Timesheet

- From the Connect Time Entry home page, in the *Settings* section, click Time Entry.
    - The user's timekeeper access will determine what and who's timesheets they are able to see when they click into Time Entry.
- When an employee selects their timesheet, the 'Time Entry' heading will default.
- Click the 'Add' button to add a new row to the timesheet.
- Enter in appropriate information including Pay Type, Posting Code, and Hours.
- Click the checkmark to save the timesheet to be submitted at a later date or select the 'Submit' button to submit the timesheet.

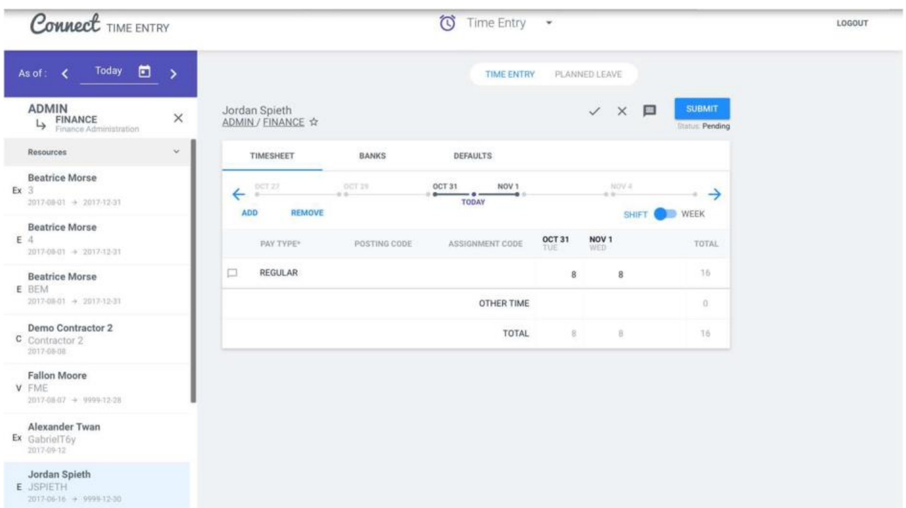

Figure 12 - Timesheet Entry form for an employee ready to be saved or submitted for approval.

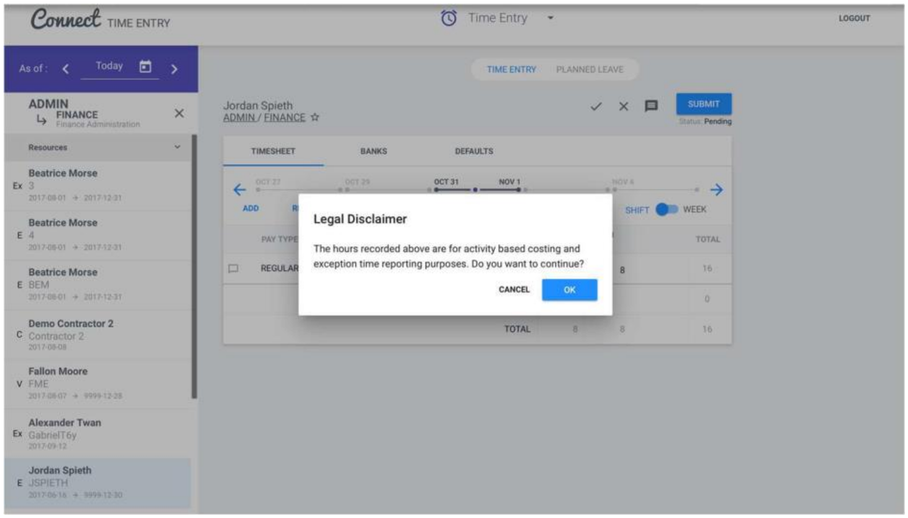

Figure 13 - Cayenta allows for a legal disclaimer which can be configured and employees must select 'OK' in order for the timesheet to be submitted for approval.

Removing a Row from the Timesheet

- From the Connect Time Entry home page, in the *Settings* section, click Time Entry.
    - The user’s timekeeper access will determine what and who’s timesheets they are able to see when they click into Time Entry.
- When an employee selects their timesheet, the ‘Time Entry’ heading will default.
- If the time has already been submitted, but not yet approved, click the “Unsubmit” button to un-submit the time.
- If the time is only in saved status, or once it has been reverted back to a saved status, click the “Remove Row” button to remove the row of entry from the timesheet.

Crew Time Entry

Crew Time Entry in Timesheet Entry for an entire crew, rather than just one individual and allows Cayenta Financials users to replace Crew Card Entry for Job Costing and EQ.

Time for all employees and equipment that was used by the crew for the day can be entered and submitted together. Once the time has been submitted, it then goes through the same MLA process as Timesheet Entry through the Timesheet Approval screen.

Entering Time for a Crew

- Using the Crew ID dropdown, select the crew you wish to enter time for.
  - Crew entry uses a daily shift, so the entry screen will automatically populate to show the current day.
  - When crew is retrieved, the columns on the bottom portion of the screen reflect to show the earning codes that are setup for the crew retrieved.

Figure 14 - Crew ID now displays as a dropdown to easily scroll through the list of crews.

- Use the lookup to pull in a Work Order or Job number to post the crews time to. Or use the 'Add Unallocated' button to enter time without entering a job number.
  - The 'Add Unallocated' option can be used in the event that a crew is called out due to an emergency and a job or work order is not currently created for that job.
  - Next business day, once the work order or job is created, the job can be added through Timesheet Entry.

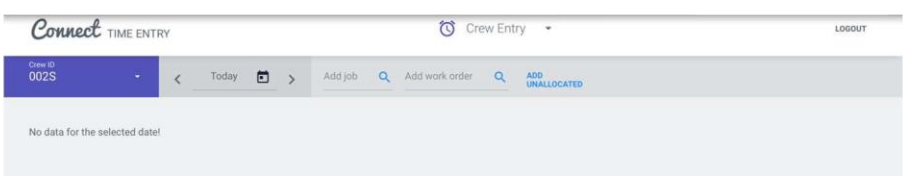

Figure 15 - Once Crew ID is selected, date, Job lookup, Work Order lookup, and 'Add Unallocated' button are available to be selected by the user entering time.

- Use the 'Fill All' option at the top of the column to fill in Assignment Code, Hours, or Comments for all resources on the crew.

- Once time has been entered, save and submit the time for the crew. Submitting the time sends it through to the Timesheet Approval screen for approval.

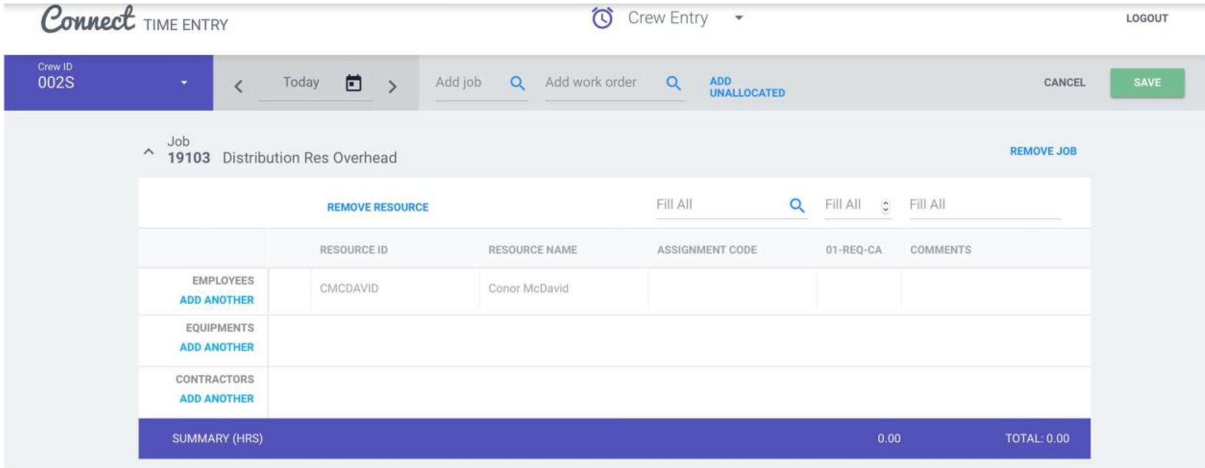

Figure 16 - Once Job, Work Order, or Unallocated option is chosen, form displays to allow user to add time and resources to the crew.

Time Entry Approval

Timesheet Approval

Once a unit has submitted time for the full shift (daily, weekly, etc.), the user that is set as the first approver will receive an email that the unit's time is ready for approval.

Approving/Rejecting Timesheets

- From the Connect Time Entry home page, in the *Settings* section, click Time Entry.
    - The user's timekeeper access will determine what and who's timesheets they are able to see when they click into Time Entry.
- When an approver selects a unit/subunit, the 'Time Entry' heading will default.
- Any timesheet currently pending approval will display in the form. The form will default to the current shift, though the approver can use the back and forward arrows to easily advance to past and future shifts to approve.
- Under the 'Decision' column, hover over the 'o' and a checkmark and X will show to allow the approver to either approve (checkmark) or reject (X) the timesheet.
    - 'Approve All' and 'Reject All' buttons are also available for the approver to quickly approve or reject multiple timesheets.
- Select 'Process' to process the approval.

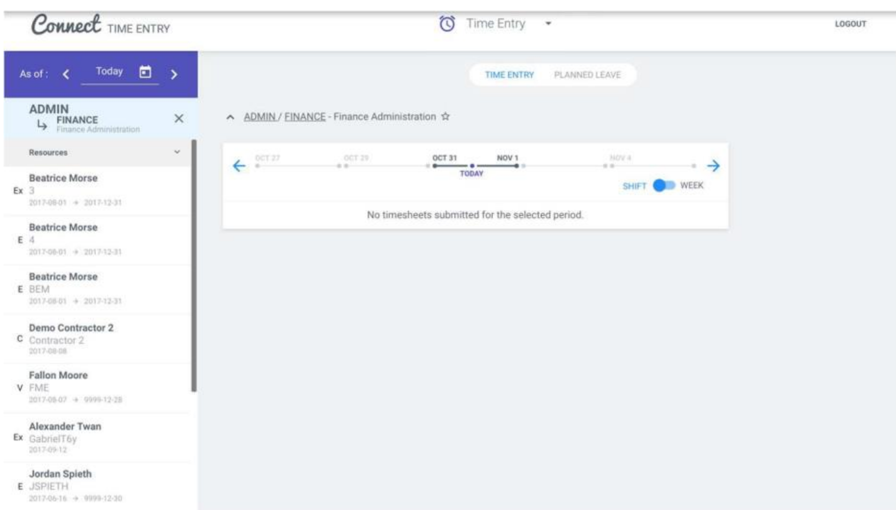

Figure 17 - Example of Timesheet Approval with no entries ready for approval for the current shift.

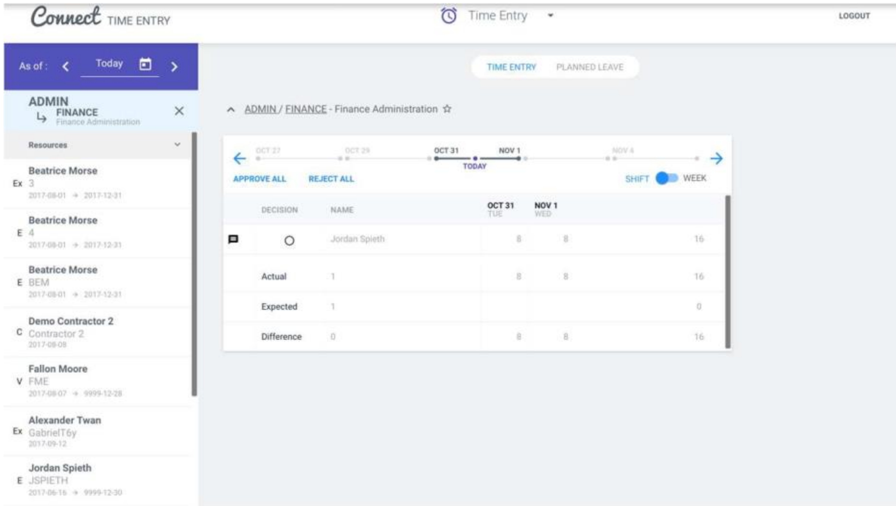

Figure 18 - Timesheet Approval form with records ready to be approved.

Planned Leave Approval

Once Planned Leave Requests have been submitted for approval, or submitted for withdraw, they will be seen by the approver through the Planned Leave Approval screen.

Timekeeper access and multi-level approval will be used to determine which units/subunits the user will be able to view the approval forms for.

Approving/Rejecting a Planned Leave Request

- From the Connect Time Entry home page, in the *Settings* section, click Time Entry.
    - The user's timekeeper access will determine what and who's timesheets they are able to see when they click into Time Entry.
- When an approver selects a unit/subunit, select the 'Planned Leave' heading.
- Any requests pending approval will show for the unit/subunit.
- Under the 'Decision' column, hover over the 'o' and a checkmark and X will show to allow the approver to either approve (checkmark) or reject (X) the planned leave request.
    - 'Approve All' and 'Reject All' buttons are also available for the approver to quickly approve or reject multiple requests.
- Select 'Process' to process the approval.

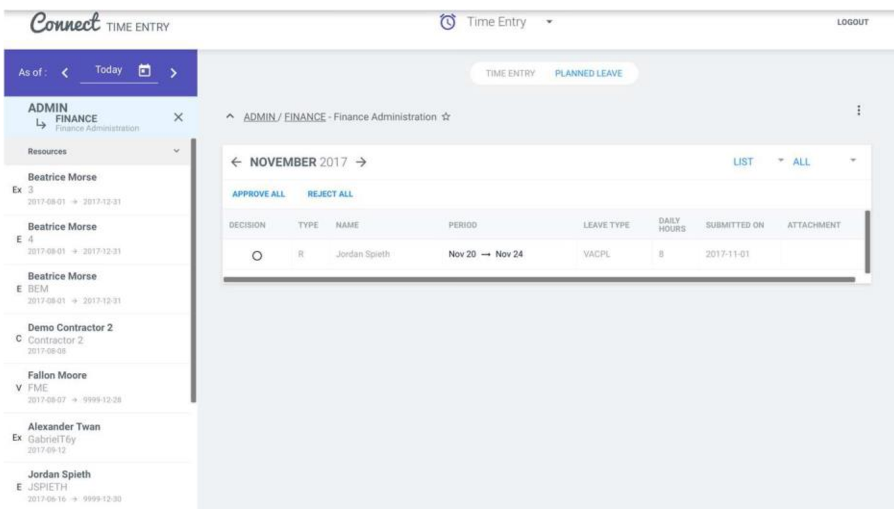

Figure 19 - Planned Leave Approval form ready to be approved.