Quick User Guide

Sky Compass Employee Portal

This guide is meant to support you in using Sky Compass for your time and expense entries. While not all questions may be answered with this, we hope it helps as you become familiar with the system. Should you have additional questions, please contact one of the following:

1. Drew Smith – dsmith@thecouncil.org
2. Leslie Stusiak-Drew – lstusiak@thecouncil.org
3. Marie Hale – mhale@thecouncil.org

General information:

Logging on:

To access Sky Compass, visit: www.c-q-l.org/admin

Use your CQL email address (example@thecouncil.org) as your User Name and the password you selected to log in. If you need your password reset, please contact Drew.

The site is also set up for mobile use should that be more convenient. Please see mobile set-up guidance sent out by Seth Petre on 9/21/2016 for step by step instructions.

As the top of the page, you will see a spot for: message, notifications and tasks. Please keep an eye on these, as it is a convenient way to see when time is approved or for a manager to send you a message in the system.

At the top you will also see you name. Clicking on your name will allow you to view your profile. In your profile, you will see your current contact information on file as well as your basic payroll information.

Getting Around:

Once in Sky Compass, you will see that the main page has options for inputting time and expenses. You can also access these pages on the left hand side. Once time and expenses are entered, you can view your entries under the Time/Expense tab on the left.

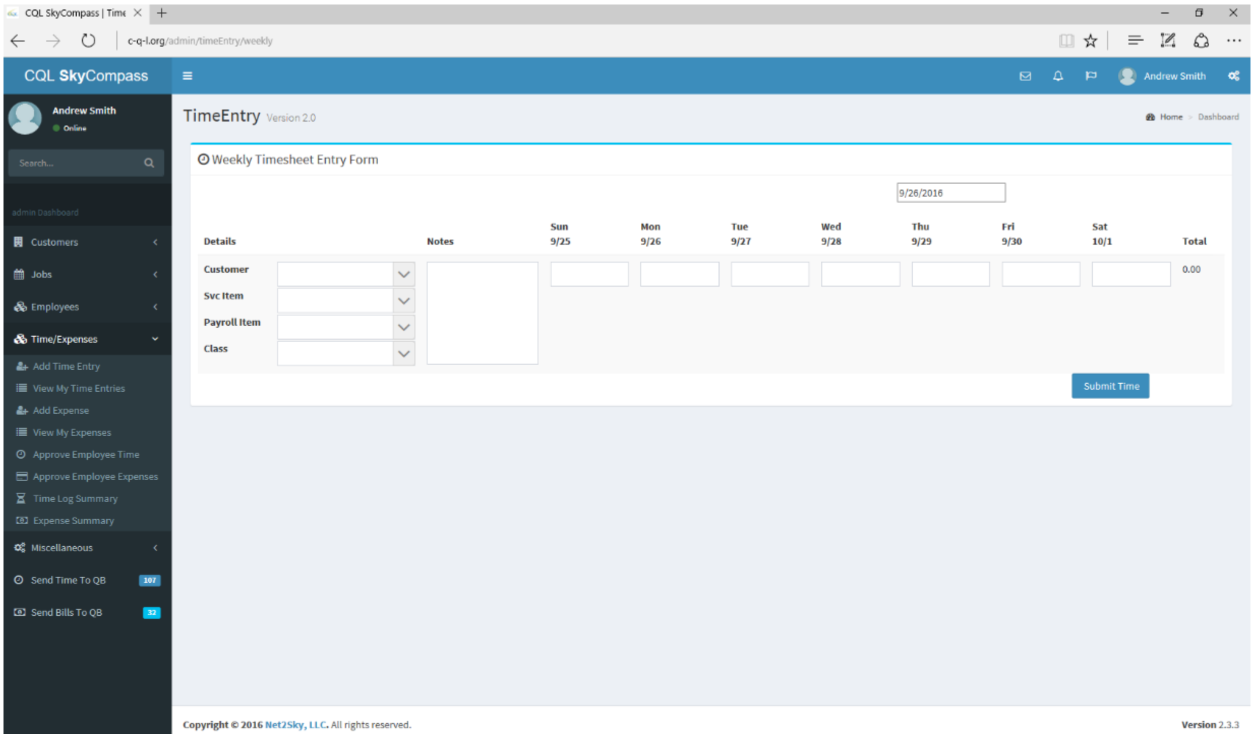
Time Entry

To input time, use the left navigation bar a select “Add Time Entry” (or add time entry from the main landing page).

When you select to add time, you are given two options:

a. Single Entry – this is best used for single day or time limited entries
b. Weekly Timesheet – best used for the majority of time, when activities span multiple days or you are inputting time for multiple customers within a one-week period.

Once you select to input time, you will see the following:



Some guidance:

1. Please make sure you select the right **date** range. The system defaults to the current date. For weekly timesheets, be sure to pick the week in which you are logging time, otherwise, the timesheet may be sent back during review.
2. The **customer** is the agency in which you are working. At times, this may be hard to discern, especially for work still being conducted under BIP grants, so if you have questions about the correct customer, please contact Leslie and/or Cate and they can assist.
3. **Service items** can be tricky. The list of service items includes anything and everything we as an organization do for a customer (currently, this list includes travel expense billing items, but that will be fixed soon). We have tried to group items into buckets (i.e. Accreditation, BIP, Training, Certification, Special Projects). When selecting the service item, we are picking the type of work being conducted. For accreditation, PCE Lrg SV1 = PCE Accreditation for a Large Agency, and it was the first site visit. While we do our best at informing you of the item prior to going on site, at times you may have questions. Please reach out to any of us should you need any additional guidance or something doesn't appear to be listed.

4. **Payroll Items** is how time gets classified in our payroll system. So, for all field work conducted, if you are currently working as a per diem staff, please select Daily Rate.
5. **Class** is the bucket in which the work you are conducting falls. For example, for my PCE Lrg SV1 (above) the class would be accreditation.
6. **Notes** are always welcome, especially as the system continues to be developed. Please feel free to input notes which helps in the timesheet review process.
7. Time should be entered in hours. For example, in my PCE Lrg SV1, if I was onsite for 5 days, under the current per diem payment model, I would input 8hrs on Monday, Tuesday, Wednesday, Thursday and Friday (5 days or 40 hours)
8. In the weekly timesheet view, you can add multiple customers. As soon you enter an amount of time for the first customer, a new line will appear and allow you to enter time for a second customer. Please remember, each customer for the week can be one line…If you worked for that customer on Monday and Wednesday, enter the time on the same line but on the two different days.
9. Once you submit your time, it goes to a manager for review and approval before being sent to the payroll system. **PLEASE BE SURE TO KEEP PAYROLL AND PAY PERIOD END DATES IN MIND, AS MISSING THE DATES MAY MEAN YOU DO NOT GET PAID IN THE RIGHT PAYROLL PERIOD.** Payroll dates are shown on the landing page when you first log in. If your manager has questions about your time that cannot be fixed by them, you will receive an email asking you to resubmit your time with a correction.
10. Currently, there is not a save and continue feature in the weekly timesheet function, however, that is being worked on.

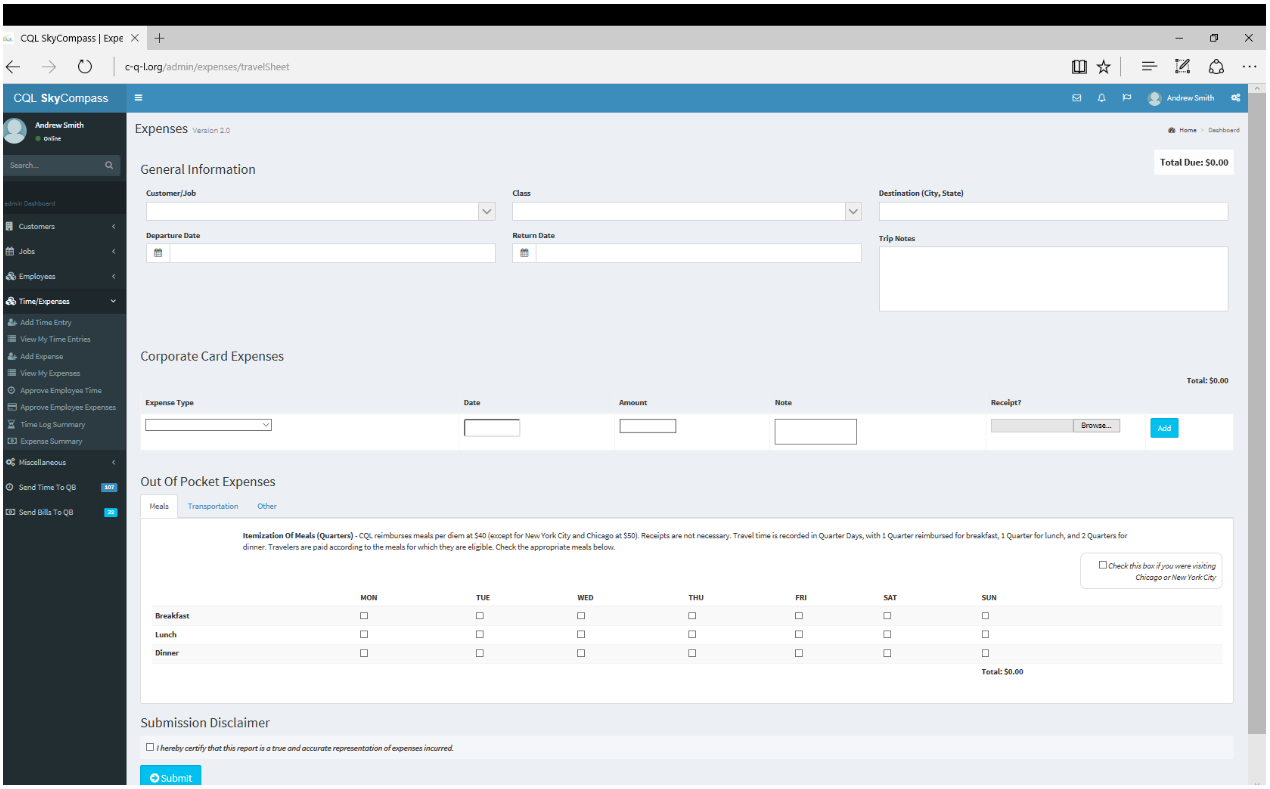
Expense Entry

Inputting expenses is very similar to inputting time. To input expenses, use the left navigation bar a select "Add Expense" (or add time entry from the main landing page).

When you select to add time, you are given two options:

c. Single Entry – this is best used for single expenses like supplies or shipping
d. Travel Sheet – best used for the majority of expenses, and set up to mimic or previous expense sheets for travel.

Once you select to input expenses, you will see the following:



Some guidance:

1. Please make sure you select the right **date** range.
2. Please be sure to input the location you traveled to.
3. The **customer** is the agency in which you are working. At times, this may be hard to discern, especially for work still being conducted under BIP grants, so if you have questions about the correct customer, please contact Leslie and/or Cate and they can assist.
    a. IF YOU ARE WORKING WITH MULTIPLE CUSTOMERS DURING THE SAME WEEK, PLEASE SELECT THE FIRST OR PRIMARY CUSTOMER FOR YOUR FORM. IN THE NOTES SECTION, PLEASE LIST THE OTHER CUSTOMERS YOU WERE WORKING WITH AND THE DAYS YOU WERE AT THIS LOCATION. WE WILL RE-CODE THIS ON THE BACKEND FOR COSTS WE PASS TO THE CLIENT. We are working on a more permanent solution to multiple custoemrs that should be very user friendly, but please use this solution in the short-term.
4. **Class** is the bucket in which the work you are conducting falls. For example, for my PCE Lrg SV1 (above) the class would be accreditation.
5. **Notes** are always welcome, especially as the system continues to be developed. Please feel free to input notes which helps in the expense review process.
6. Corporate Card Expenses are shown first; this includes all expenses put on the CQL credit card for a trip. Please note, if you are entering a “Single Entry” expense form, you will have to click in the top right if it is an expense put on the corporate card.
    a. **Expense Type** can be tricky; it is like service item in timesheets. However, please scroll to the bottom and you will see a category called Staff Items. This list would be inclusive of all corporate card expenses, broken into the following categories: Accreditation, Core

Services (Training/Certification), BIP and Administrative. So, for example, if you were uploading your expense for Air for an accreditation review, the expense type would be Air – ACCRED. We have included an "Other (note req)" category for ancillary items like tolls. Please include a note about the expense if you select other.

   b. Once you select the Expense type, please input the **date** the expense was charged, the **amount** of the expense line item (should match receipt) and any **notes** to provide clarification.
   c. Finally, please upload a copy of your receipt. The system is set up to take almost any file type, including PDF of image files. You will need to have the image on your desktop on in a folder on your computer, and when you click browse, you can locate the file to upload. If you are using the mobile app, you can search your pictures and upload right from your phone.
   d. Once you add the expense, you cannot edit it. It must be deleted a re-entered.

7. **Out of Pocket Expenses** follow corporate card expenses. These include things like per diem meal reimbursement, mileage to and from the airport and other ancillary out of pocket expenses that may have been paid by you instead of put on the company card.
   a. **Meals** – this is where you select your per diem quarters. The boxes you select are set up to identify breakfast as 1 quarter, lunch as 1 quarter and dinner as 2 quarters. All you need to do is click the right boxes for when you were onsite. Please note, if you were traveling in Chicago, the five NY boroughs or Atlanta, you need to click the box in the upper right which will change the quarterly amount from $40 to $50.
   b. **Transportation** – this is where you log your request for mileage to and from the airport, or if you used your personal car for a site visit. In the column "Car/Taxi" you will see the system defaults to "car". This allows you to input the miles each way and the system will calculate the reimbursement based on our rate. If you took a cab or Uber but paid using your own card or account, select "taxi" here, input the amount you paid and upload the receipt.
   c. **Other** – please use this for other out of pocket expenses that doesn't fit into meals or transportation. This may include things like Tolls that were paid out of pocket. A receipt is required.
8. When you are done filling out your expense form, click the box at the bottom that says "I hereby certify that this report is a true and accurate representation of expenses occurred" and then hit "submit". Completing these steps will begin the review process.