Time and Labor (OTL)

Create and Use Timecard Attachments - Super and Limited Timekeepers

DODEA R12 Work Instructions
Document Control

Change Record

<table>
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<tr>
<th>Date</th>
<th>Author</th>
<th>Version</th>
<th>Change Reference</th>
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<tr>
<td>16-Oct-2014</td>
<td>Robin Hardy</td>
<td>1.0</td>
<td>R12 Upgrade</td>
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Reviewers

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<th>Date</th>
<th>Name</th>
<th>Position</th>
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<tr>
<td>20-Oct-2014</td>
<td>Bill Mohamed</td>
<td>Work Force Preparation, Lead</td>
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Distribution

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<td>DODEA_R12_WI_OTL_AMS_Create and Use Timecard Attachments_Timekeepers</td>
<td>DAI DEPS</td>
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Note to Holders:
If you receive an electronic copy of this document and print it out, please write your name on the equivalent of the cover page, for document control purposes.

If you receive a hard copy of this document, please write your name on the front cover, for document control purposes.
Table of Contents

DOCUMENT CONTROL ........................................................................................................ II
BUSINESS PROCESS DESCRIPTION .................................................................................. 1
Create Timecard Attachments ......................................................................................... 2
View and Modify Timecard Attachments ......................................................................... 14
Business Process Description

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

Trigger

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

Prerequisites

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

Responsibilities

- Super Timekeeper – DODEA
- Limited Timekeeper – DODEA

Menu Path

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

- Timekeeper Entry
Create and Use Timecard Attachments

Create Timecard Attachments

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

**Home**

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

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

The Timekeeper Entry form provides two different search options:

- Basic Find Criteria
- Advanced Search

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

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

2. **Group Name** - Select a Timekeeper Group name or use the default Timekeeper Group.

3. **Recurring Period** – The default value, “DAI Bi-Weekly – Starts Sunday” is standard for most agencies, indicating timecards are submitted every two weeks and each pay period starts on a Sunday.

4. **Period** – The default value is the current Payroll Period.

5. Click the **Find** button to populate the Timekeeper Entry form with employee timecards that match the selected criteria.
6. Click the **Attachments**... (Paperclip) icon to add an attachment to the selected timecard.

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

If the timecard was previously entered and in a status of **Approved, Error, Submitted or Working**, the **Attachments**... (Paperclip) icon will already be in an active status without saving or re-querying the **Timekeeper Entry** form.
7. Click on the **Category** List of Values (LOV) to auto-populate the **Categories** with the **Miscellaneous** selection (only one selection).
Create and Use Timecard Attachments - Timekeeper (OTL)

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Attachments

8. Enter a title and/or description in the Title and Description fields. (Optional)

9. Click the Data Type LOV and select the appropriate data type in the Datatype listing, then click the OK button.

- To add a File, proceed to step 10.
- To add Long Text, proceed to step 14. (>2000 characters)
- To add Short Text, proceed to step 14. (≤2000 characters)
- To add a Web Page, proceed to step 17.

Note: All Datatypes “File, Short Text, Long Text and URL’s” can be attached and then viewed in the approval notification window with each timecard. The May Be Changed checkbox defaults and may not be changed.
Attachments: File Upload

10. Click the button to select and attach a file from the desired location in the Upload File field.

11. Click the button to attach the selected document to the timecard.
Attachments: Confirmation

12. A confirmation page will be displayed, stating the file has been successfully uploaded.

13. As instructed by the **Confirmation** statement:

   a) "Please close the web browser": - Click the **Close Window** link or icon in the right corner of the **Confirmation** page.

   b) The **Attachment** form will be displayed. Click the **Yes** button on the **Decision** box to indicate the file upload is complete.
14. Click the **Data Type LOV** and select **Short Text** or **Long Text**, depending on the length of the text to be added.

| Short Text | Stores 2000 characters or less. |
| Long Text  | Stores more than 2000 characters. |

15. Type or paste text into the text area.

16. Click the icon at the top of the screen to save the entered **Short or Long Text**.
Create and Use Timecard Attachments - Timekeeper (OTL)

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

18. Enter a valid URL in the File or URL field.

19. Click the Save icon in the toolbar at the top of the screen.
20. Click the **New** icon on the top menu bar to add another row in the **Attachments** form. Return to step 7 in this section to add additional documents.
## Timecard Submission

<table>
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<tr>
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<th>Project</th>
<th>Task</th>
<th>Hours</th>
<th>Type</th>
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<tr>
<td>SERVICE, BRAD</td>
<td>DODEA_PAYROLL</td>
<td>HQ_PAYROLL - HK, RG - Regular Grades</td>
<td>8</td>
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</tbody>
</table>

### 21.

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

**b)** Click the **OK** button to confirm.
Create and Use Timecard Attachments - Timekeeper (OTL)

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Timecard Submission

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

Result

Congratulations! You have successfully created timecard attachments as a Timekeeper in DAI.
View and Modify Timecard Attachments

1. Start the task using the responsibility and menu path to open the **Timecard** form:
   - **Responsibility**: Limited Timekeeper – DODEA OR Limited Timekeeper – DODEA – Ungraded
     Super Timekeeper – DODEA OR Super Timekeeper – DODEA – Ungraded
   - **Menu Path**: Timekeeper Entry
The Timekeeper Entry form offers two different search options:

- Basic Find Criteria
- Advanced Search

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

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

2. **Group Name** - Select a Timekeeper Group name or use the default Timekeeper Group.

3. **Recurring Period** – The default value “DAI Bi-Weekly – Starts Sunday” is standard for most agencies, indicating timecards are submitted every two weeks and each payroll period starts on a Sunday.

4. **Period** – The default value is the current Payroll Period.

5. Click the Find button to populate the Timekeeper Entry form with employee timecards that match the selected criteria.
6. Click the Attachments... (Paperclip) icon to view attached documents for the selected timecard.
7. Select an item to view an attachment.
   
   - To view attachments with a data type of **Short Text** or **Long Text**, the text is displayed directly in the lower portion of the form.
   
   - To view attachments with a data type of **Web Page**, click the **Open Document** button. The web page box will be displayed.
   
   - To view attachments with a data type of **File**, click the **Open Document** button. The File Download dialog box will be displayed. Select **Open**.
Attachments: Modify a Text or Web Page URL Attachment

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

9. Select a data type of Short Text or Long Text and edit the text directly in the lower portion of the form.
10. Click the **Source** tab to modify attachments with a data type of **Web Page**. The **File or URL** column will be displayed; edit as necessary.
Attachments: Delete a File Attachment

11. For attachments with a data type of **File**, you must delete the attachment and attach a new file.

Click the **Delete** icon on the top menu bar to start the deletion process for the attachment.
Deletion Process - Caution

12. A Caution dialog box will be displayed, confirming that an item is about to be deleted. Select from the following choices:
   - Click the OK button to continue the deletion of the Attachment and Document process.
   - Click the Cancel button to opt out of the Caution dialog box and to retain the attachment.

Deletion Process - Forms

13. Click the Yes button to save the changes made to the Attachments form and to complete the deletion process of removing that data type from the Attachments form.

Note: If No is selected, the file will return to the Attachments form and will not have been deleted. Select the Cancel button to return to the previous screen.
Create and Use Timecard Attachments - Timekeeper (OTL)

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Deletion Process

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

Resubmit Timecard with an Attachment modification or deletion.

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

Resubmittal - Complete Comments

15. Enter comments in the Comment field describing the change made to the Attachments form.
Create and Use Timecard Attachments - Timekeeper (OTL)

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Resubmit Timecard – Submit Selected Lines

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

17. Click the OK button to confirm.

18. Re-query the timecard in the Timekeeper Entry form by pressing CTRL + F11. Confirm the status has changed to Submitted.

Result

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