



# **Time and Labor (OTL)**

Automatic Timecard Generation

DODEA R12 Work Instructions



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## Document Control

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### Change Record

Date	Author	Version	Change Reference
27-Sep-2014	Robin Hardy	1.0	R12 Upgrade

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### Reviewers

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

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### Distribution

Copy No.	Name	Location
1	DODEA_R12_WI_OTL Automate Timecard Generation	DAI DEPS
2		

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## Business Process Description

This Work Instruction provides guidance on how to auto-generate a “default” timecard. This custom process allows for exception-only timecard entry. If a timecard does not exist, the program will create a timecard based off of the Fixed Tour of Duty (TOD) record by entering the pay code and scheduled set hours or days/half days recorded for each day. And Non-fixed tours, code 3, 5, 7, D, E will default to Monday thru Friday a straight 8 hours a day or days/half days added to the timecard.

An already existing timecard in “Working” status will be updated by the Automatic Timecard Generation process to coincide with the TOD for each scheduled day of work.

A default Project and Task must be established in DAI for each employee, in order to auto-generate a timecard.

To produce a timecard, the following responsibilities must of have previously processed their part:

Responsibility	Action
<b>Cost Accounting</b>	A Default Project and Task must be entered for each employee.
<b>HR CSR</b>	A valid Tour of Duty with a: <ul style="list-style-type: none"> <li>• “Fixed” Alternate Work Schedule (AWS) code of 0,1, 2, 6, 8,</li> <li>• “Non-fixed” Alternate Work Schedule (AWS) code of 3, 5, 7, D, E.</li> </ul> The employee must have the following details as part of their employee record on the Assignments form within DAI. <ul style="list-style-type: none"> <li>• Organization</li> <li>• Job</li> <li>• Location</li> <li>• Assignments Status</li> <li>• People Group showing Graded or Ungraded indicator and Employee type code.</li> <li>• Payroll</li> <li>• Supervisor Name</li> </ul>

Refer to these Work Instructions to use with the above prerequisites:

Action	R12 Work Instruction Name
Add an Employee Default Project and Task	<i>Create Default Employee Project and Task</i>
Update an Employee record with personnel information listed above.	<i>HR CSR View Employee HR Record History</i>
Enter or update an Employee’s Tour of Duty (TOD)	<i>Modify a Tour of Duty (TOD)</i>



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**Business Process, continued**

The Automatic Timecard Generation program is run as a concurrent request. The program can be run for an Agency, Employee, Location, Organization or Timekeeper Group.

**Trigger**

Timecards need to be created or completed for the current pay period.

**Prerequisites**

- The employee is set up in DAI with a Person and Assignment record, including a supervisor.
- Tour of Duty work schedule is stored and linked to the person.
- A valid default Project and Task is set up in the Special Information Type (SIT) on the employee's record.
- The employee must have a "fixed TOD" (with an alternate work schedule of 0, 1, 2, 3, 6, or 8 on their Tour of Duty) or a "Non-fixed" TOD with an AWS of 3, 5, 7, D, E.
- The employee must have one valid default project and task combination.

**Responsibilities**

- OTL CSR – DODEA

**Menu Path**

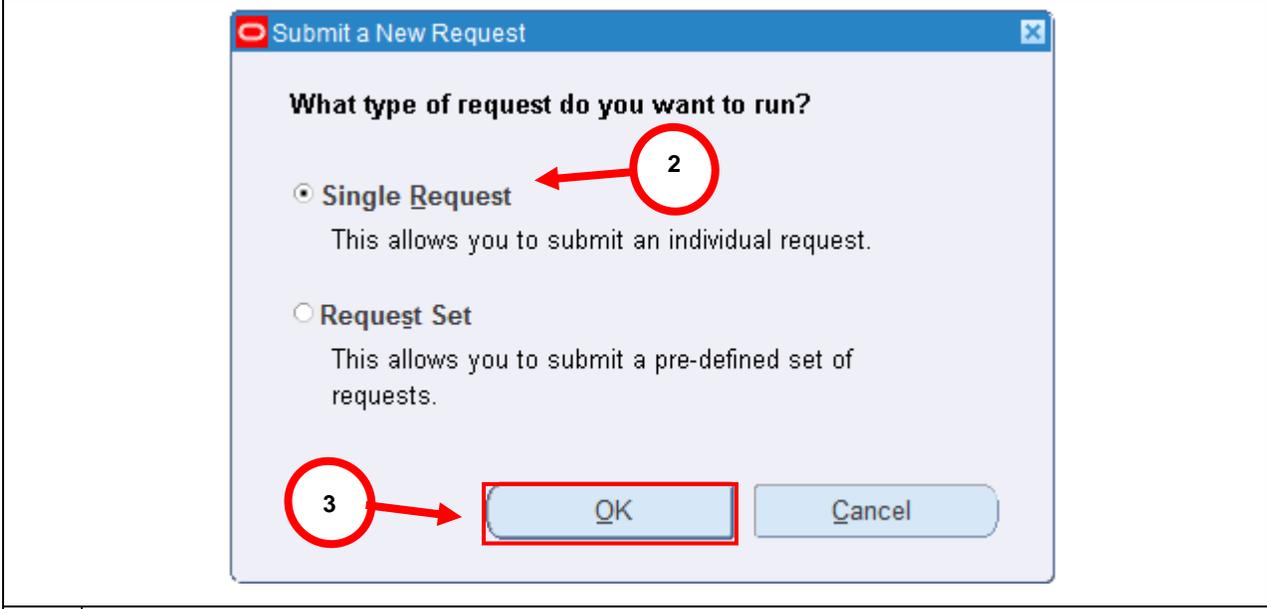
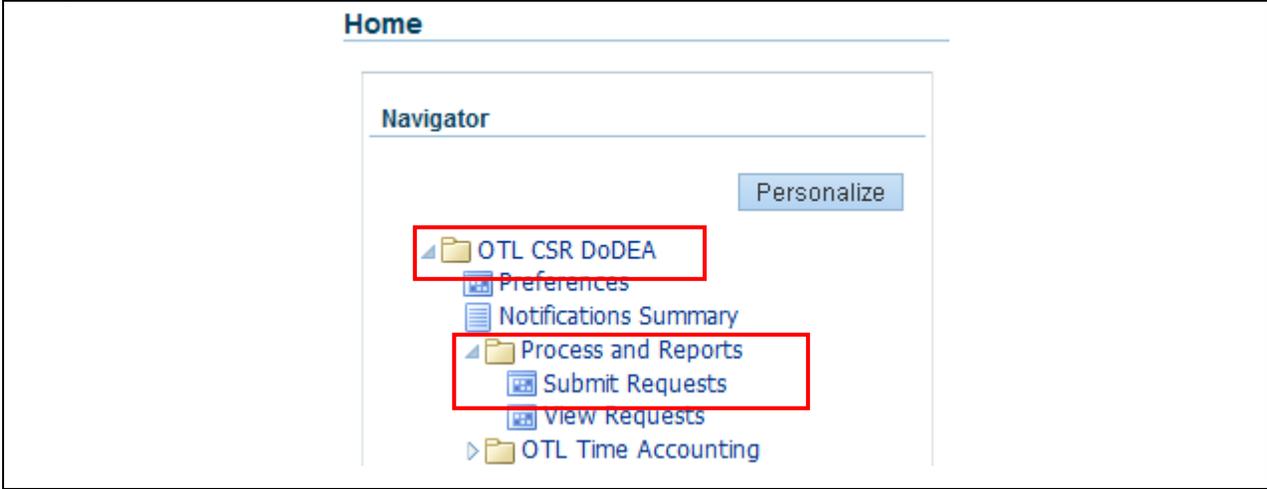
- OTL CSR – Processes and Reports → Submit Requests

**Training Exercises:**

- Run Automated Timecard Generation process to complete a timecard that is in a "Working" status but the employee cannot complete the timecard due to extenuating circumstances.

## Run Auto Timecard Generation

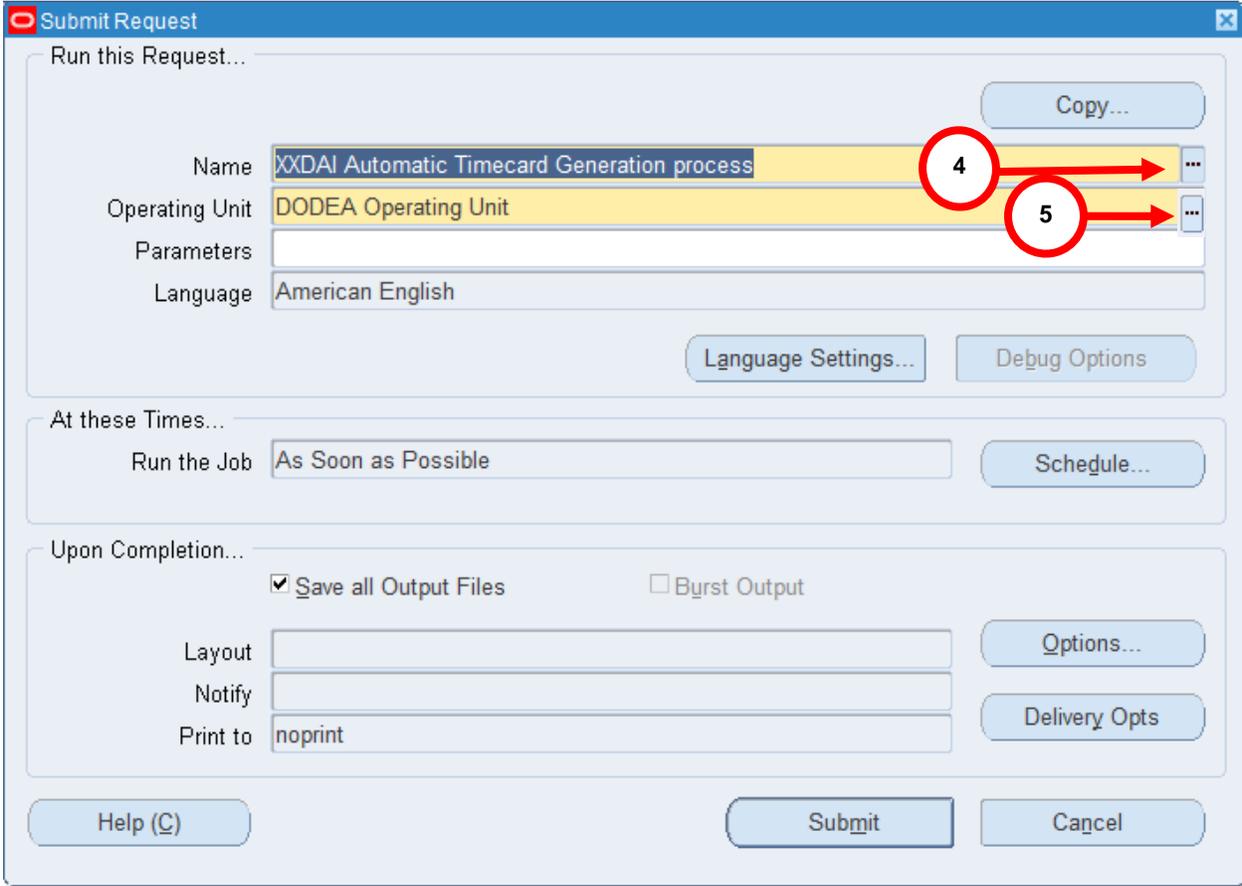
1. Start the task using the responsibility and menu path to open the worklist:
  - **Responsibility:** OTL CSR – DODEA
  - **Menu Path:** Process and Reports → Submit Requests



2. Select the **Single Request** radio button. **(Default)**

3. Click the **OK** button to open the **Submit Request** form.

### Submit Request



The screenshot shows a 'Submit Request' dialog box with the following fields and buttons:

- Run this Request...**
  - Name:  (Annotation 4 points to the list of values button on the right)
  - Operating Unit:  (Annotation 5 points to the list of values button on the right)
  - Parameters:
  - Language:
  - Buttons: Language Settings..., Debug Options
- At these Times...**
  - Run the Job:  (Schedule... button)
- Upon Completion...**
  - Save all Output Files  Burst Output
  - Layout:  (Options... button)
  - Notify:
  - Print to:  (Delivery Opts button)
- Buttons: Help (C), Submit, Cancel

4.	Click the Name field List of Values (LOV)  button for a list of reports available and select the "XXDAI Automatic Timecard Generation process." Press the <b>Tab</b> key.
5.	Click the (LOV) icon for the <b>Operating Unit</b> field. By default the correct Operating Unit will auto-complete.

**Submit Request – Parameters**

6. The **Parameters** window displays. Populate the parameters using the list of values in each row. **Parameters** in yellow are required.
- a. **Payroll Name:** Click the **LOV** to auto-populate the payroll for your Agency from the list of values.
  - b. **Period Start Date:** Defaults to the current payroll period. Select the payroll period by start date for the timecard(s) you wish to generate if different from the default.
    - Timecards may be automatically generated for the current payroll period, or a prior payroll period if the current run date is within the payroll period plus the cutoff date.
  - c. **Create Timecard For:** Select from the list of values. The below five parameters will enable / disable additional fields based on the value you enter in this field.

Timecard Options	Description
Agency	Entire Agency
Employee (most common)	Single Employee
Location	Entire Location
Organization	Entire Organization
Timekeeper Group	Entire Timekeeper Group

### Submit Request – Parameters

Parameters

Payroll Name DoDEA DDEDE Bi-Weekly Payroll

Period Start Date 22-FEB-2015

Create Timecard For EMPLOYEE Employee

Employee SERVICE, BEN DODEA

Organization

Location

Timekeeper Group

Timecard Status SAVE Working

OK Cancel Clear Help

7. a) Select the **Timecard Status**:
- Save** – This will save the timecards in a **Working** status without submitting. The employee or timekeeper will be able to view the timecard and make any changes (if necessary), then submit the timecard for approval.
- Submit** – This will save the timecards in **Submitted** status and automatically send a notification to the approver
- b) Click the **OK** button after all the **Parameter** values have been entered.

### Submit Request - Parameters

Run this Request... Copy...

Name	XXDAI Automatic Timecard Generation process
Operating Unit	DODEA Operating Unit
Parameters	DoDEA DDEDDE Bi-Weekly Payroll:22-FEB-2015:EMPLOYEE:SERVICE, BEN DODEA
Language	American English

Language Settings... Debug Options

At these Times...  
Run the Job: As Soon as Possible Schedule...

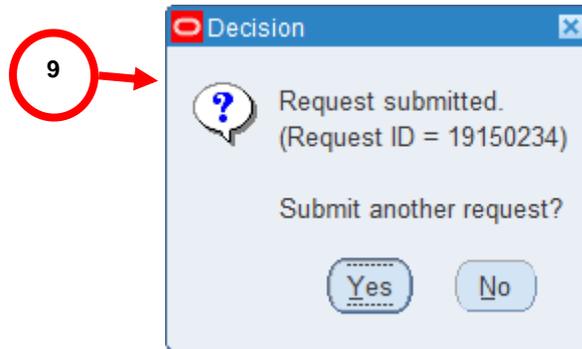
Upon Completion...  
 Save all Output Files  Burst Output

Layout:  Options...  
Notify:  Delivery Opts  
Print to: noprint

Help (C) Submit Cancel

**8.** Click the **Submit** button to run the process.

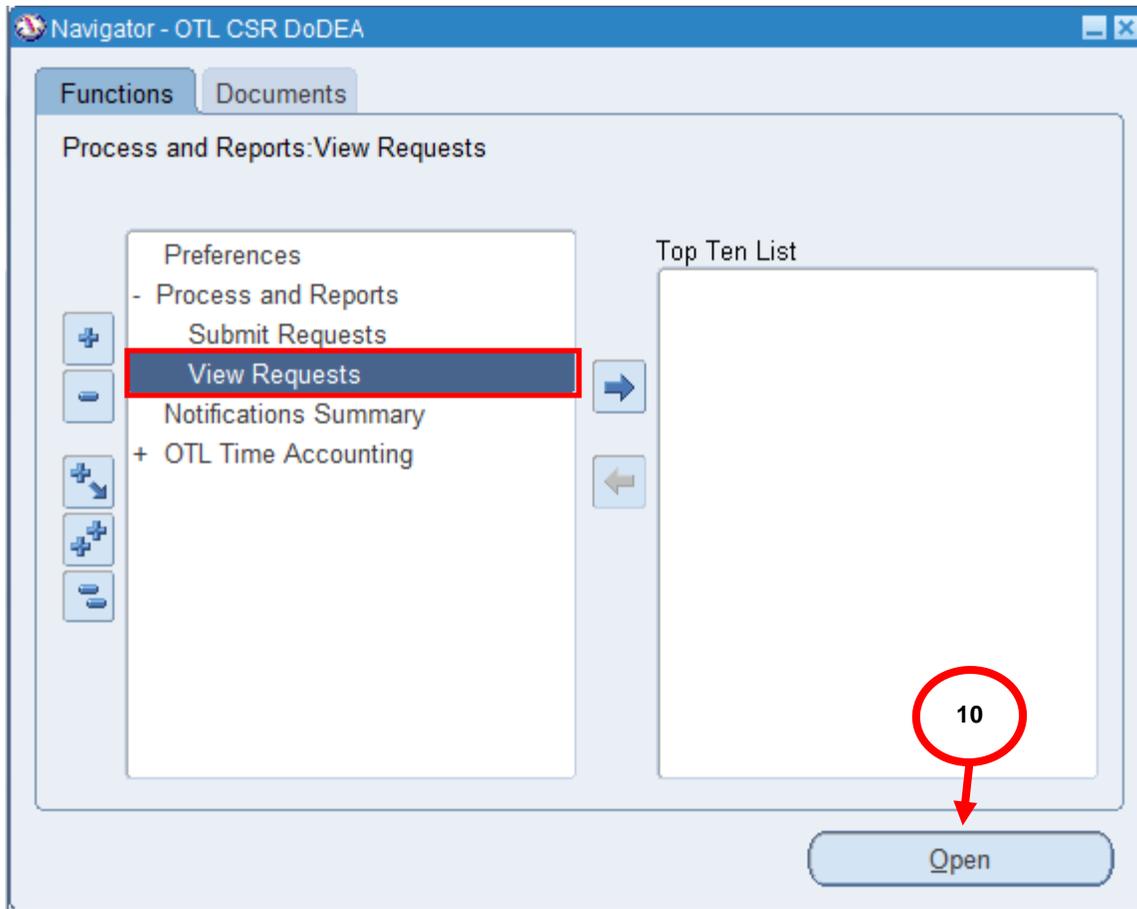
**Decision**



9.

**Decision** – If you would like to submit another request, click the  button. Otherwise, click the  button to submit the request.

### Process and Reports – View Requests



10. Select the **View Requests** option and click the **Open** button. Note: You can also double-click the **View Requests** option.

### Find Requests

Find Requests

My Completed Requests

My Requests In Progress

All My Requests

Specific Requests

Request ID

Name

Date Submitted

Date Completed

Status

Phase

Requestor

Include Request Set Stages in Query

Order By **Request ID**

Select the Number of Days to View:

Submit a New Request... Clear Find

11.

Click the **Find** button to display the **Requests** form.

**Requests – Request ID # - View Output**

The screenshot shows a web application window titled "Requests". At the top, there are three buttons: "Refresh Data", "Find Requests", and "Submit a New Request...". Below these is a table with the following columns: Request ID, Name, Parent, Phase, Status, and Parameters. The table contains several rows of request data. At the bottom of the window, there are six buttons: "Hold Request", "View Details...", "View Output", "Cancel Request", "Diagnostics", and "View Log...".

Request ID	Name	Parent	Phase	Status	Parameters
19150234	XXDAI Automatic Timecard		Completed	Normal	OTL CSR DoDEA, 4357, 286, .
19149287	XXDAI Timecard Summary		Completed	Normal	4357, 286, 2015/02/08 00:00:0
19148973	XXDAI Timecard Audit Rep		Completed	Normal	4357, 226, . . . , EMP
19112464	XXDAI Timecard Audit Rep		Completed	Normal	4357, 286, 2015/02/08 00:00:0
19112451	XXDAI Timecard Audit Rep		Completed	Normal	4357, 286, 2015/02/08 00:00:0
19112425	XXDAI Timecard Detail Rep		Completed	Normal	OTL CSR DoDEA, 56848, 435
19112381	XXDAI Timecard Audit Rep		Completed	Normal	4357, 226, 2015/02/08 00:00:0
19112375	XXDAI Timecard Detail Rep		Completed	Normal	OTL CSR DoDEA, 56848, 435
19112370	XXDAI Timecard Summary		Completed	Normal	4357, 226, 2015/02/08 00:00:0
19112297	DQM Serial Sync Index Pro		Completed	Normal	

- 12. Click the **Refresh Data** button until the **Phase** and **Status** fields change from **Pending** and **Normal** to **Completed** and **Normal**. The process has now completed successfully.
- 13. Click the **View Output** button to view the report. The report opens in a separate browser window.  
  
**Note:** After running the Automatic Timecard Generation process, your Timekeepers or Employees may log in to view/update the automatically generated timecards and submit for approval.

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### Automatic Timecard Generation Process Output File

Below is a sample of the output file for the Automatic Timecard Generation process displaying the notification that a timecard was created for the employee's name submitted.

PERIOD START DATE: 22-FEB-2015

\*\*\*\*\*  
Timecards created for the following employees  
\*\*\*\*\*

EMPLOYEE NAME	EMPLOYEE NUMBER (#)
SERVICE, BEN DODEA	59

\*\*\*\*\*  
Timecard Errors for the following employees  
\*\*\*\*\*

EMPLOYEE NAME (#)	(#)	ERROR MESSAGE
*** NO ERRORS ***		

<b>Result</b>
<b>Congratulations!</b> You have successfully run the Automatic Timecard Generation process for an individual employee.