Time and Attendance (OTL)

Create, Modify & Delete an Attachment in Self Service

DoDEA R12 Work Instructions

Document Control

Change Record

The copy Date	Author	Version	Change Reference
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Reviewers

Date	Name	Position
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Distribution

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1	DODEA_R12_WI_OTL_AMS_Create, Modify & Delete an Attachment in Self Service	DEPS

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Business Process Description

This process is used by the employee to attach documentation to their 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 needs to attach time-related documentation 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 timecard has been created and is in "Working", "Submitted", "Approved", "Rejected", or "Error" status.

Responsibilities

- Employee Time User – DODEA

Menu Path

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

- Time → Create Timecard

Training Exercises:

- Attach a Document as an Employee

Create a Timecard Attachment

1.	Start the task using the responsibility and menu path to open the **Timecard** form:
	Responsibility: Employee Time User – DODEA
	Menu Path: Time → Create Timecard

Create Timecard

| 2. | Click the **Template** drop down arrow and select under **My Templates – Reg. Hours Template**. |
| | **Note**: The timecard defaults to the current **Payroll Period** use the **Period** drop down to change the **Payroll Period** for the timecard. |

3.	Click the **Apply Template** button to auto-populate the time card information and hours.
4.	Click the **Show Timecard Attachments** link to display the **Timecard Attachments** option.

5.	Click the **More…** link to display the **Attachments** form.

6.	Click the **Add Attachments** button to display the **Add Attachments** form.

Add Attachment	
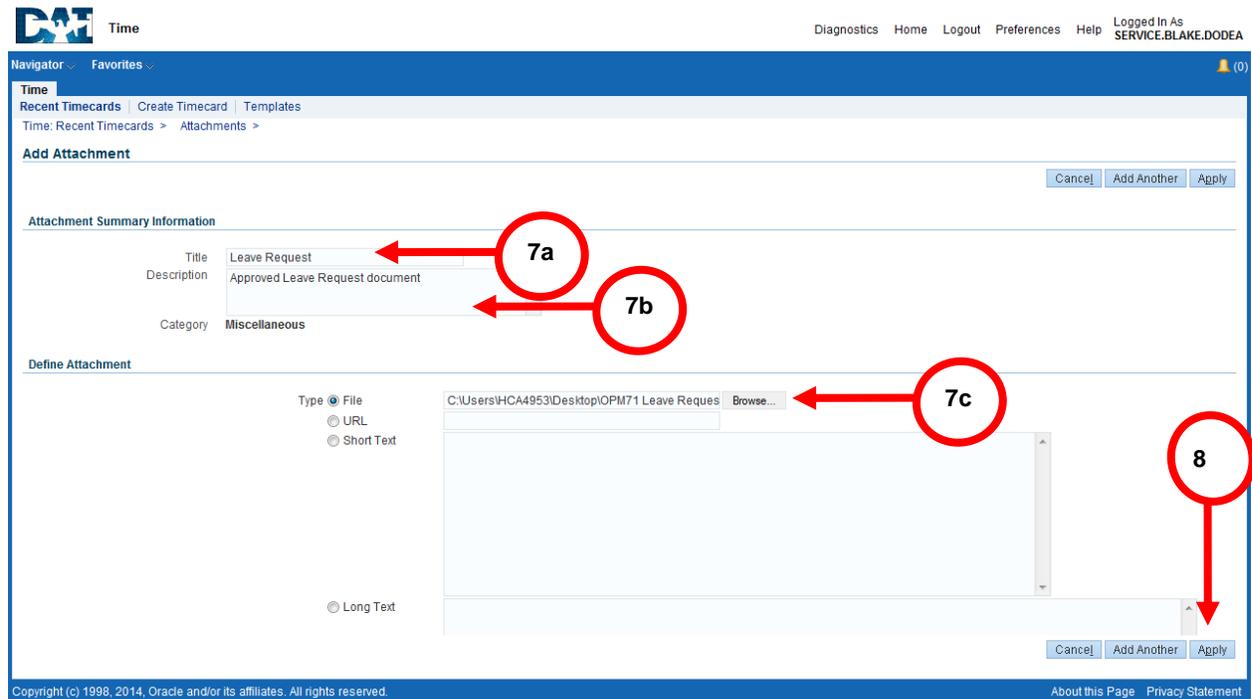
7.	**a**. Enter the attachment file name in the **Title** field. **b**. Enter a **Description** of the document being attached, if necessary. **c**. Click the **Browse** button to locate and select the file attachment from your computer or network drives. **Note**: There are additional options other than attaching a file to the timecard. These options are: • **URL –** Select the **URL** radio button and enter in a valid URL referencing a document. • **Short or Long Text –** Select the **Short** or **Long Text** radio button and enter in the free flow text in the field to be attached to the timecard.
8.	Click the **Apply** button to receive the confirmation notice.

Add Attachment

9.	Click the <u>**Return to Time Entry: SERVICE, BLAKE, DODEA, 68**</u> link to return to the timecard. Continue the submittal process of the timecard.

Note: You **MUST** click the **Return to Time Entry** link in order to return to the timecard and complete the attachment process. |

10.	**Timecard Entry Decision**

If…	**Then Proceed to Step…**
Entering hours prior to the end of the pay period	Step 10a
All hours have been entered and the timecard is ready for attestation and submittal	Step 10b

a) Click the **Save** `Save` button to save the timecard and return to it at a later date.

- A **Confirmation** message appears indicating the timecard has been saved successfully.

Note: **Time Entry Rules** and **Tour of Duty** validations are processed during this step. If the validation fails, an error message will appear indicating which day(s) and hours require correction(s).

b) Click the **Continue** `Continue` button to validate the timecard before submitting for attestation and approval.

Note: **Time Entry Rules** and **Tour of Duty** validations are processed during this step. If the validation fails, an error message will appear indicating which day(s) and hours require correction(s).

Note: The attached document is a link on the timecard and can be viewed by clicking once on the file name.

Submit Timecard

Time
Recent Timecards	Create Timecard	Templates

Review: SERVICE, BLAKE DODEA, 68

Cancel   Back   Submit

* ☐ I affirm the Time and Attendance data to be true, correct and accurate   **11**

Week Starting   **Sunday, March 08 2015**
Timecard Period (days)   **14**
Comments

Project	Task	Type	EHO Code	ND Hours Ind	Sun, Mar 08	Mon, Mar 09	Tue, Mar 10	Wed, Mar 11	Thu, Mar 12	Fri, Mar 13	Sat, Mar 14	Sun, Mar 15	Mon, Mar 16	Tue, Mar 17	Wed, Mar 18	Thu, Mar 19	Fri, Mar 20	Sat, Mar 21	Total
DODEA_PAYROLL_FY15	HQ PAYROLL	RG - Regular Graded and Military				8	8	8	8	8			8	8	8	8	8		80
					0	8	8	8	8	8	0	0	8	8	8	8	8	0	80

▷Show Timecard Attachments

Cancel   Back   Submit

11.	Click the check box next to the **Attestation** statement to validate the timecard and to enable the **Submit** button.

Time
Recent Timecards	Create Timecard	Templates

Review: SERVICE, BLAKE DODEA, 68

12   Cancel   Back   Submit

* ☑ I affirm the Time and Attendance data to be true, correct and accurate

Week Starting   **Sunday, March 08 2015**
Timecard Period (days)   **14**
Comments

Project	Task	Type	EHO Code	ND Hours Ind	Sun, Mar 08	Mon, Mar 09	Tue, Mar 10	Wed, Mar 11	Thu, Mar 12	Fri, Mar 13	Sat, Mar 14	Sun, Mar 15	Mon, Mar 16	Tue, Mar 17	Wed, Mar 18	Thu, Mar 19	Fri, Mar 20	Sat, Mar 21	Total
DODEA_PAYROLL_FY15	HQ PAYROLL	RG - Regular Graded and Military				8	8	8	8	8			8	8	8	8	8		80
					0	8	8	8	8	8	0	0	8	8	8	8	8	0	80

▷Show Timecard Attachments

Cancel   Back   Submit

12.	Click the **Submit** button to send the timecard to the **Approver**. The timecard moves from **Working** status to a status of **Submitted** with an attachment that can be opened and reviewed by the timecard **Approver**.

| View Attachment to Timcard |
|---|
| |
| **13.** Click the **Recent Timecards** tab to view the submitted timecard showing the attachment icon. |
| |
| **14.** Place the cursor over the attachment icon in the **Attachments** column to view the attachments window displaying the name of the file attached to the timecard. |
| **Result** |
| **Congratulations!** You have successfully created a timecard with an attached file within DAI. This attachment will be visible to the Approver when approving the timecard. |

View or Modify a Timecard Attachment

1. Start the task using the responsibility and menu path to open the **Timecard** form:
 	
    Responsibility: Employee Time User – DODEA
 	
    Menu Path: Time → Time Entry
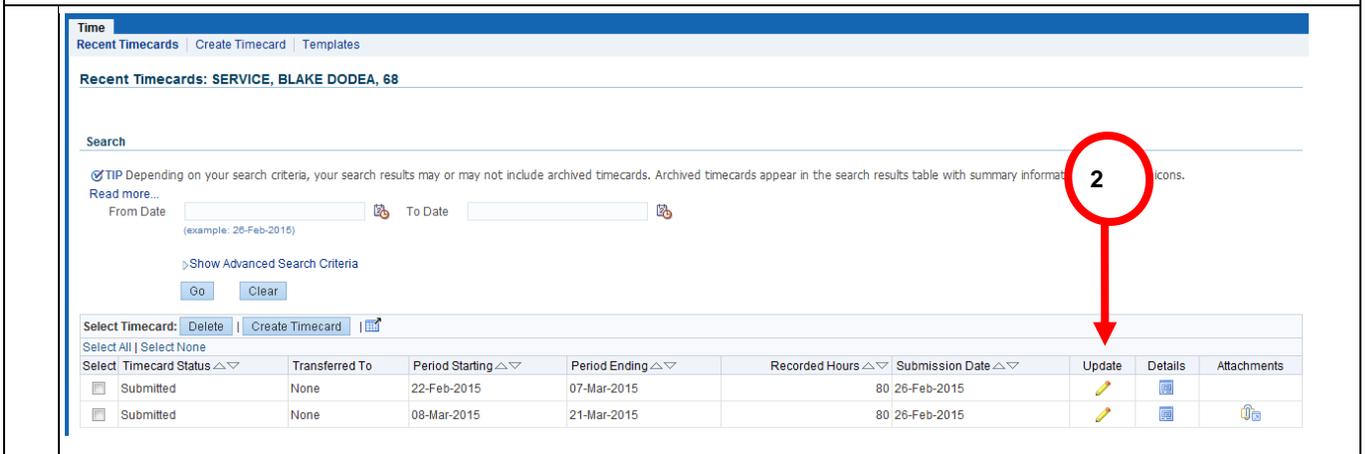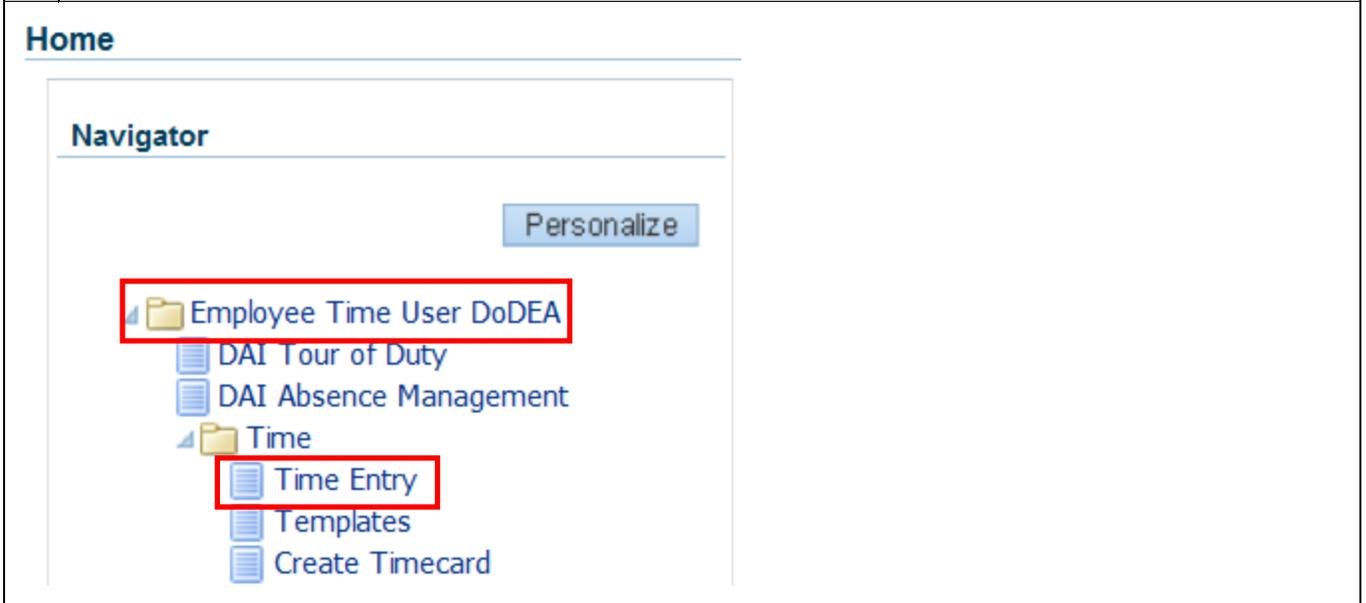
2.	Click the **Update** 🖊 icon to display the timecard. **Note**: Modifcations should be made within the file **PRIOR** to reattaching the file back to the timecard. The updated file will need to be reattached to the timecard and cannot be edited while attached to the timecard.

3.	Click the **Show Timecard Attachments** link to display the **Timecard Attachments** option.

Display Attachment

4.	Click the **More…** link to open the **Add Attachment** form. **Note**: Click the file name link to display the file. In this view edits to the file are **NOT** allowed.

5.	Click the **Update** ✎ icon to display the **Update Attachments** form

Re-attach a Modified File

6.	a.	Edit the title of the file **Leave Request** by adding the verbiage **Revised.**
	b.	Click in the **Description** box and add the verbiage **Attaching the revised Leave Request**.
	c.	Click the **Browse** button to search of the file to be attached to the timecard.
	d.	Click the **Apply** button to attach the file to the timecard.

| 7. | Click the **Return to Time Entry: SERVICE, BLAKE, DODEA, 68** link to return to the timecard and continue the submittal process of the timecard. |
| | **Note**: You **MUST** click the **Return to Time Entry** link in order to return to the timecard and complete the attachment process. |

Submit Timecard With Attachment

8.	**Timecard Entry Decision**

If…	Then Proceed to Step…
Entering hours prior to the end of the pay period	Step 8a
All hours have been entered and the timecard is ready for attestation and submittal	Step 8b

a) Click the **Save** [Save] button to save the timecard and return to it at a later date.

- A **Confirmation** message appears indicating the timecard has been saved successfully.

Note: **Time Entry Rules** and **Tour of Duty** validations are processed during this step. If the validation fails, an error message will appear indicating which day(s) and hours require correction(s).

b) Click the **Continue** Continue button to validate the timecard before submitting for attestation and approval.

> **Note**: **Time Entry Rules** and **Tour of Duty** validations are processed during this step. If the validation fails, an error message will appear indicating which day(s) and hours require correction(s).

Note: In order to complete the attachment process on the timecard, click either the **Save** or **Continue** button.

Submit the Timecard with the Modified Attachment

9.	Click the **Attestation** check box to validate the timecard and to enable the **Submit** button.

10.	Click the **Submit** button to send the timecard to the **Approver**. The timecard moves from a **Working** status to a **Submitted** status with an attachment that can be opened and reviewed by the timecard **Approver**.

View Timecard with Attachment

11.	Click the **Return to Recent Timecards** link to confirm the attachment of the file on the timecard.

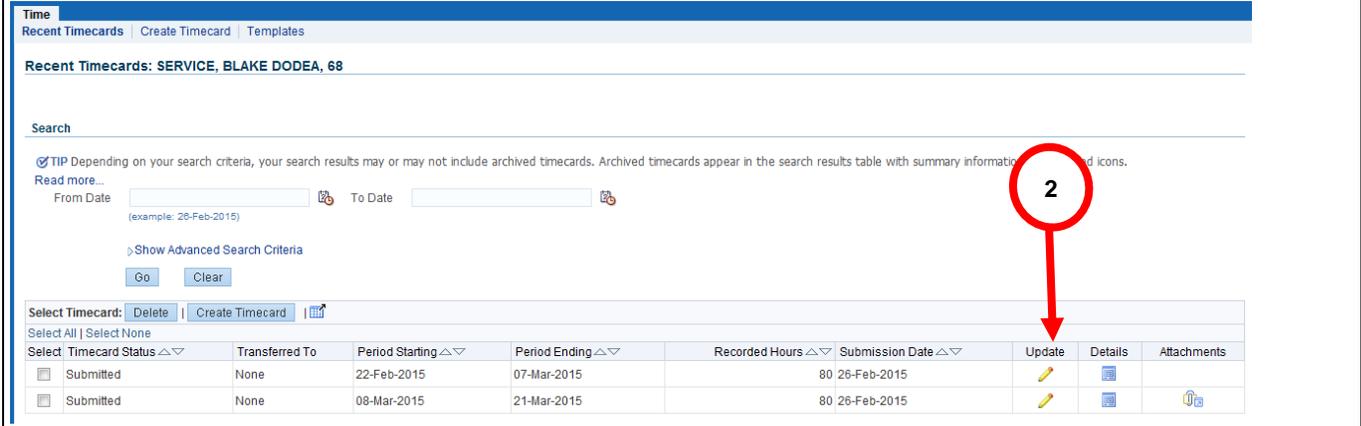| 12.	Place the cursor over the attachment icon in the **Attachments** column to view the **Attachments** window displaying the file name link.

Result
Congratulations! You have successfully attached a modified file to a timecard in DAI.

Delete a Timecard Attachment

1.	Start the task using the responsibility and menu path to open the **Timecard** form:
	Responsibility: Employee Time User – DODEA
	Menu Path: Time Entry

View Attachment

2.	Click the **Update** ✏ icon to open the timecard.

View Attachment

3.	Click the **Show Timecard Attachments** link to display the **Timecard Attachments** option.

View Attachment

| 4. | Click the **More…** link to open the **Attachments** form. |

Delete an Attachment

5.	Click the **Delete** 🗑 icon to start the removal process of the file.

6.	Click the **Yes** button to delete the attachment. **Note**: Click the **No** button to cancel out of the screen and return to the **Attachments** form.

7.	Click the **Return to Time Entry: SERVICE, BLAKE, DODEA, 68** link to continue the deletion process.

Save Timecard

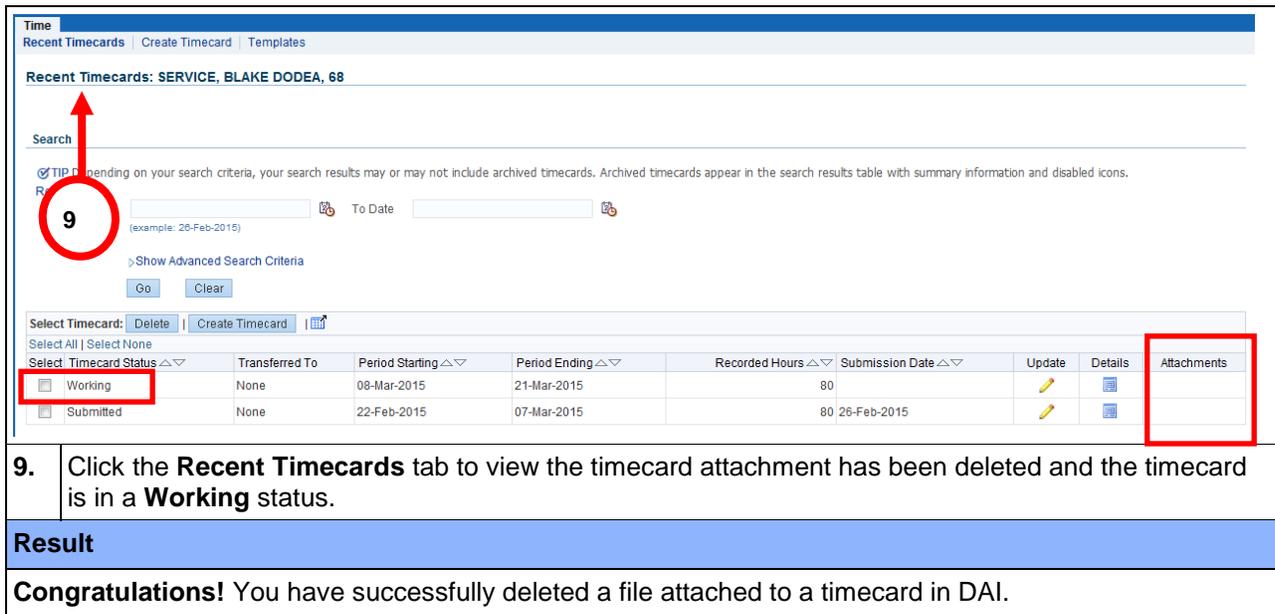| 8.	**Timecard Entry Decision**

If…	Then Proceed to Step…
Entering hours prior to the end of the pay period	Step 8a
All hours have been entered and the timecard is ready for attestation and submittal	Step 8b

a) Click the **Save** [Save] button to save the timecard and return to it at a later date.

• A **Confirmation** message appears indicating the timecard has been saved successfully.

Note: **Time Entry Rules** and **Tour of Duty** validations are processed during this step. If the validation fails, an error message will appear indicating which day(s) and hours require correction(s).

b) Click the **Continue** [Continue] button to validate the timecard before submitting for attestation and approval.

Note: **Time Entry Rules** and **Tour of Duty** validations are processed during this step. If the validation fails, an error message will appear indicating which day(s) and hours require correction(s).

Note: In order to complete the delete attachment process on the timecard, the **Save** or **Continue** buttons on the timecard must be used to complete the process.

9.	Click the **Recent Timecards** tab to view the timecard attachment has been deleted and the timecard is in a **Working** status.
Result	
Congratulations! You have successfully deleted a file attached to a timecard in DAI.	