Time and Attendance (OTL)

Create, Modify & Delete an Attachment in Self Service

DoDEA R12 Work Instructions
Document Control

Change Record

<table>
<thead>
<tr>
<th>Date</th>
<th>Author</th>
<th>Version</th>
<th>Change Reference</th>
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<tbody>
<tr>
<td>13-Aug-2014</td>
<td>Robin Hardy</td>
<td>1.0</td>
<td>R12 upgrade</td>
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Reviewers

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<tr>
<th>Date</th>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>14-Aug-2014</td>
<td>Mahesh Kosandal</td>
<td>Enterprise Solutions Team (OTL)</td>
</tr>
<tr>
<td>15-Aug-2014</td>
<td>Bill Mohamed</td>
<td>Workforce Preparation Team Lead</td>
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Distribution

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<td>DODEA_R12_WI_OTL_AMS_Create, Modify &amp; Delete an Attachment in Self Service</td>
<td>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.
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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 and Use Timecard Attachments – Employee Time User (OTL)

Defense Agencies Initiative

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
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.
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 **Return to Time Entry: SERVICE, BLAKE, DOD\_68** 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**

<table>
<thead>
<tr>
<th>If...</th>
<th>Then Proceed to Step...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering hours prior to the end of the pay period</td>
<td>Step 10a</td>
</tr>
<tr>
<td>All hours have been entered and the timecard is ready for attestation and submittal</td>
<td>Step 10b</td>
</tr>
</tbody>
</table>

a) Click the **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** 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

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

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.
Create and Use Timecard Attachments – Employee Time User (OTL)

Defense Agencies Initiative

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:** Modifications 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

Time Entry: SERVICE, BLAKE DODEA, 68

8. **Timecard Entry Decision**

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<tr>
<td>Entering hours prior to the end of the pay period</td>
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<tr>
<td>All hours have been entered and the timecard is ready for attestation and submittal</td>
<td>Step 8b</td>
</tr>
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a) Click the **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 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**.
Create and Use Timecard Attachments – Employee Time User (OTL)

Defense Agencies Initiative

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

2. Click the Update icon to open the timecard.

   ![Timecard Form]

2. Click the **Update** icon to open the timecard.
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.
8. Timecard Entry Decision

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a) Click the **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** 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.