



Time and Labor (OTL)

Review Timecard Approver
Subordinate Report

DODEA R12 Work Instructions



Document Control

Change Record

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

Reviewers

Date	Name	Position
15-Sep-2014	Bill Mohamed	Work Force Preparation, Lead

Distribution

Copy No.	Name	Location
1	DODEA_R12 Review Timecard Approver Subordinate Report	DEPS

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
Review Timecard Approver Subordinate Report.....	2

Business Process Description

The Timecard Approver Subordinate Report provides a list of all employees who have the OTL Supervisor Approver responsibility for an Agency. In addition, employees who are assigned to an Approver. If no subordinates exist, the report will return “No Subordinates” in the Employee Name column. This report is useful to identify employees who need re-assignment due to an Approver no longer in the approval role.

Major Features

The Timecard Approver Subordinate Report provides the following information:

Heading	Description
Report Date	Date the report is created in DAI.
Report Effective Date	The date the information is valid within the report.
Timecard Approver	Full name of the timecard approver for who is set up on the Assignment form as the Supervisor.
Approver Person Type	The Approvers person typed as listed in DAI.
Timecard Approver’s Organization	The Approver’s Organization name they belong to in DAI.
Employee Name	The Subordinate’s full name that has been assigned to the Approver (Supervisor).
Employee Organization	The Employee’s Organization name in DAI.
Emp Asn Status	The Employee’s Assignment status within DAI.

Trigger

The HR CSR responsibility has a need to identify employees who are associated to an approver within their Agency and to identify the employees/subordinates for whom they approve timecards. An Approver, who is out sick, on an extended period of leave, transferring jobs, or leaving the Agency may trigger this procedure.

Prerequisites

- Users and Supervisors must be loaded in DAI.
- Employees must be assigned to supervisors.

Responsibilities

- OTL CSR – DODEA

Menu Path

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

- Process and Reports → Submit Requests

Training Exercises:

- Create a Timecard Approver Subordinate report

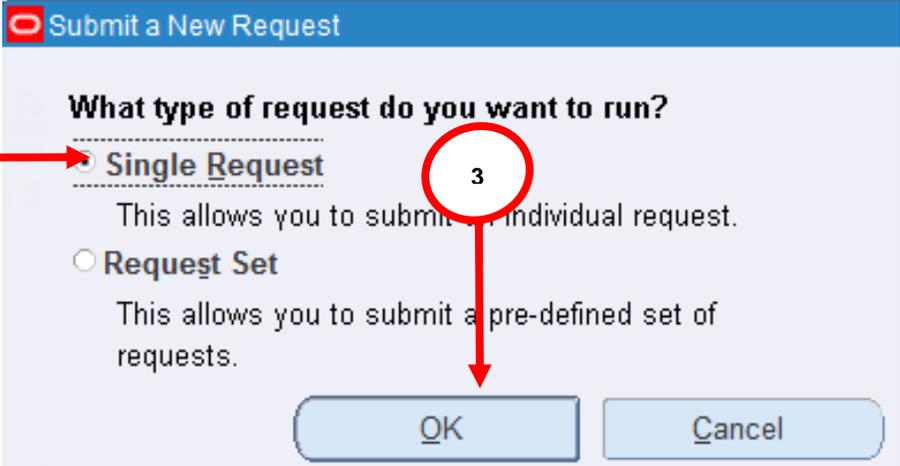
Review Timecard Approver Subordinate Report

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

The screenshot shows a software menu tree with the following structure:

- OTL CSR DoDEA (highlighted with a red box)
- Preferences
- Notifications Summary
- Process and Reports (highlighted with a red box)
 - Submit Requests (highlighted with a red box)
 - View Requests
- OTL Time Accounting
 - Mass Info. eXchange:MIX
 - Batch Element Entry
 - BEE Summary

Submit a New Request

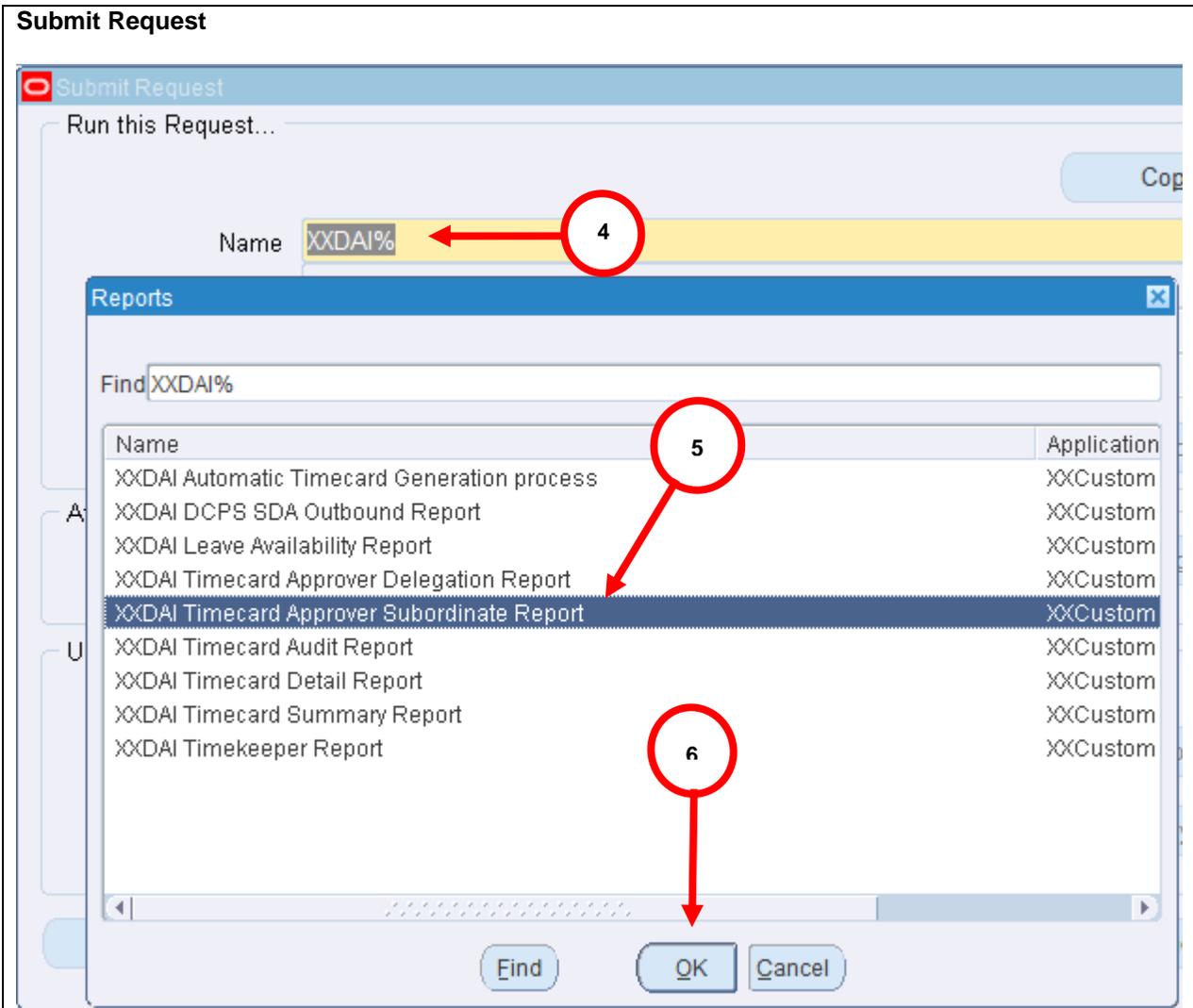


What type of request do you want to run?

Single Request
This allows you to submit an individual request.

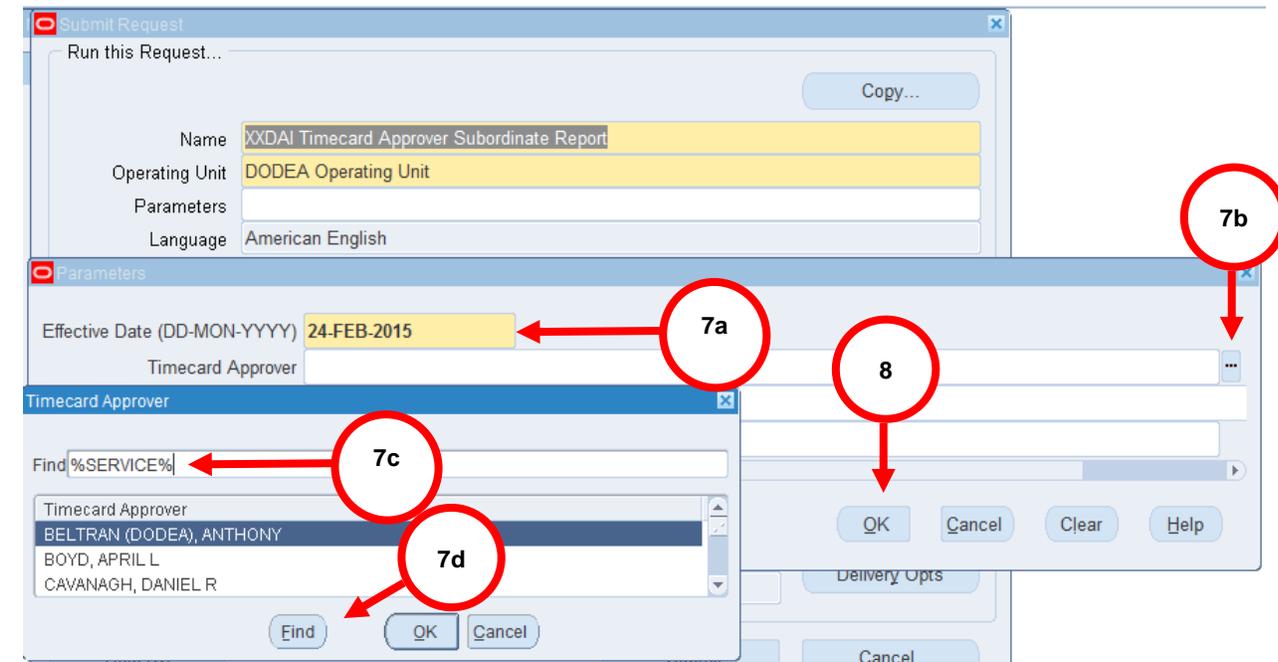
Request Set
This allows you to submit a pre-defined set of requests.

2.	Select the Single Request radio button.
3.	Click the OK button to confirm your choice and open the Submit Request form.



4.	Enter XXDAI% in the Name field and press the Tab key for a list of standard reports available to this responsibility.
5.	Select " XXDAI Timecard Approver Subordinate Report " from the report list.
6.	Click the OK button to open the Parameters form.

Submit Request – Parameters



- | | |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7. | <ul style="list-style-type: none"> a) Enter the Effective Date (DD-MON-YYYY) to see a list of Approvers and Subordinates as of a specific date. b) Select the LOV for the Timecard Approver field. c) Enter the Last Name or a partial value and the wildcard (%) for the Timecard Approver to be searched. d) Click the Find button. <p>Note: This report’s design phase has been completed. Additional options would be:</p> <ul style="list-style-type: none"> a) Timecard Approver Organization: If you would like to generate the report for a single organization within your Agency, enter the organization’s name or select an organization from the list of values in this field. Otherwise, leave it blank to run the report for all organizations. b) Employee Name: If you would like to run for one employee, or select an employee’s name from the list of values in this field. Otherwise, leave the field blank to run it for all employees. |
| 8. | <p>Click the OK button to complete the Parameters selection.</p> |

Submit Request

Run this Request...

Name: XXDAI Timecard Approver Subordinate Report

Operating Unit: DODEA Operating Unit

Parameters: 24-FEB-2015:SERVICE, BEN DODEA::

Language: American English

Language Settings... Debug Options

Copy...

At these Times...

Run the Job: As Soon as Possible

Schedule...

Upon Completion...

Save all Output Files Burst Output

Layout: []

Notify: []

Print to: noprint

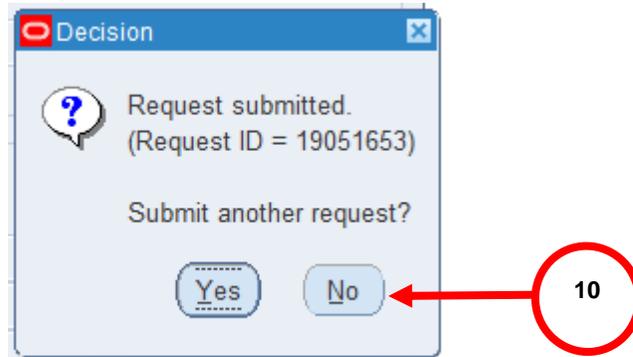
Options... Delivery Opts

Help (C) Submit Cancel

9

9. Click the **Submit** button to generate the report.

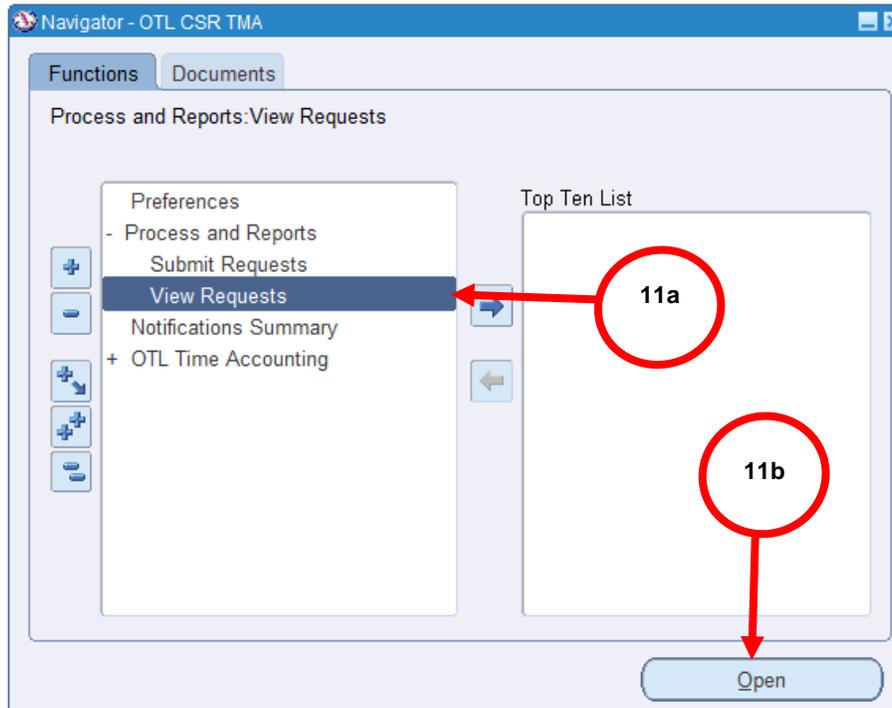
Decision



10.

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

View Requests



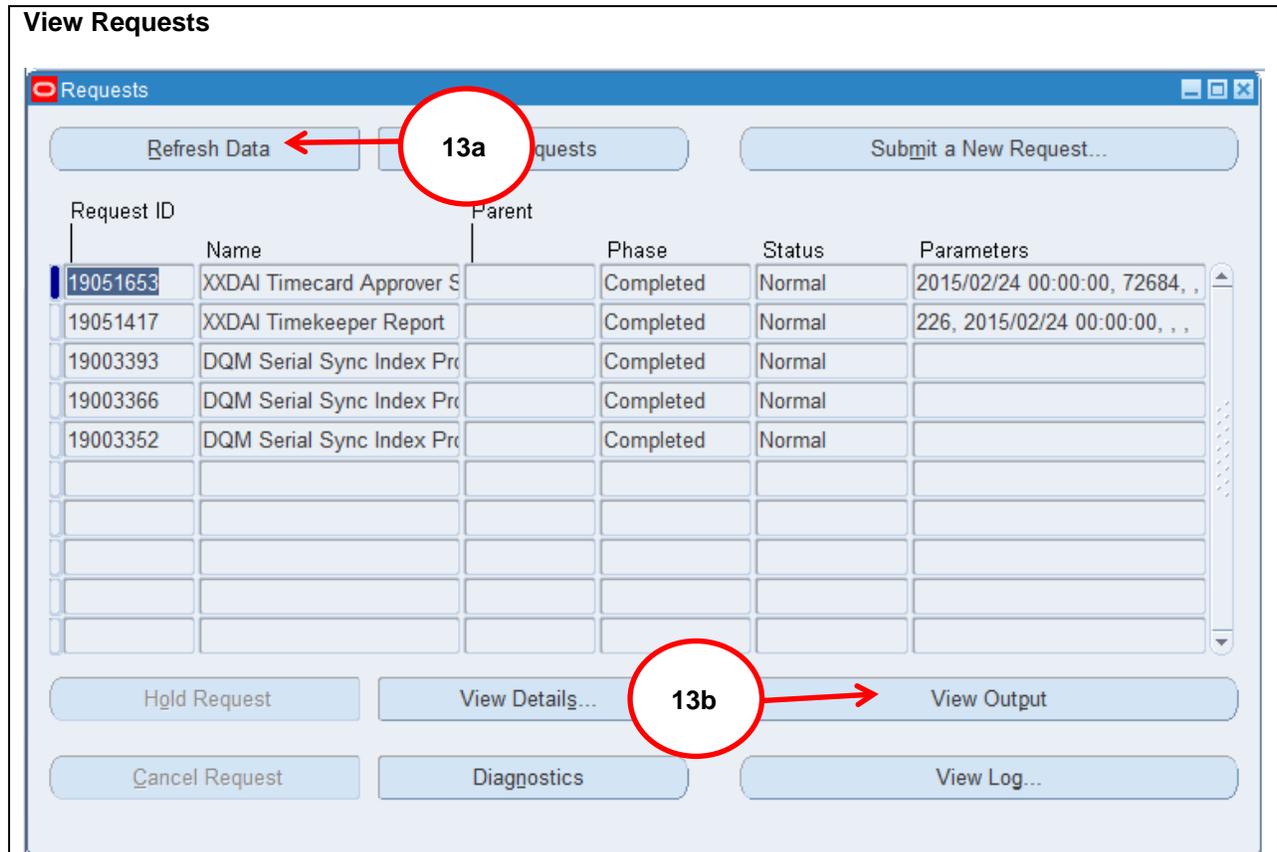
- | | |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11. | <p>a) Select the View Requests function.</p> <p>b) Click the Open button to open the Requests window.</p> <p>Note: Double-clicking the View Requests function will also open the Requests window.</p> |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Find Requests Form

The screenshot shows a web application window titled "Find Requests". It contains several radio buttons for filtering requests: "My Completed Requests", "My Requests In Progress", "All My Requests" (which is selected), and "Specific Requests". Under "Specific Requests", there are input fields for "Request ID", "Name", "Date Submitted", "Date Completed", "Status", "Phase", and "Requestor". Below these fields are a checkbox for "Include Request Set Stages in Query", an "Order By" dropdown menu set to "Request ID", and a "Select the Number of Days to View" field set to "7". At the bottom are three buttons: "Submit a New Request...", "Clear", and "Find". A red circle with the number "12" inside is positioned over the "Find" button, with a red arrow pointing down to it.

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

Note: The **Find Requests** form defaults to **All My Requests**.



13.

- a) Click the **Refresh Data** button if the report does not display as **Completed** in the **Phase** column and **Normal** in the **Status** column.
- b) Click the **View Output** button to view the **Timekeeper Report**. The **ID Request** number should match the number show on the **Decision** box in step 10.

Note: This process may require the **Refresh Data** button to be clicked multiple times. If the report does not display in a **Complete** and **Normal** status, please contact the **DAI Agency Help Desk** for assistance.

Timecard Approver Subordinate Report

Timecard Approver Subordinate Report REPORT DATE : 24-FEB-2015

Timecard Approver	Approver Person Type	Timecard Approvers Organization
SERVICE, BEN DODEA	Employee	DODEA TEST ORGANIZATION
SERVICE, BEN DODEA	Employee	DODEA TEST ORGANIZATION
SERVICE, BEN DODEA	Employee	DODEA TEST ORGANIZATION
SERVICE, BEN DODEA	Employee	DODEA TEST ORGANIZATION
SERVICE, BEN DODEA	Employee	DODEA TEST ORGANIZATION

EFFECTIVE DATE : 2015/02/24

Employee Name	Employee Organization	Emp Asn Status
HARDY, ROBBIN DODEA	DODEA TEST ORGANIZATION	A-Active
SERVICE, BETTY DODEA	DODEA TEST ORGANIZATION	A-Active
SERVICE, BOB DODEA	DODEA TEST ORGANIZATION	A-Active
SERVICE, BRAD DODEA	DODEA TEST ORGANIZATION	A-Active
SERVICE, BRENDA DODEA	DODEA TEST ORGANIZATION	A-Active

Note: This report is displayed in two sections. The report output displayed above provides rows of employees grouped by the Approvers on the left.

14.	Review the Timecard Approver Subordinate report. This report can be copied into Excel.
------------	-----------------------------------------------------------------------------------------------

14a	Approver Section	Displays the Approvers name, Person Type and the Organization the Approvers resides in.
14b	Employee Sections	Displays the Employee's name, Organization and Assignment status within DAI.

Result

Congratulations! You have successfully generated the Timecard Approver Subordinate Report.