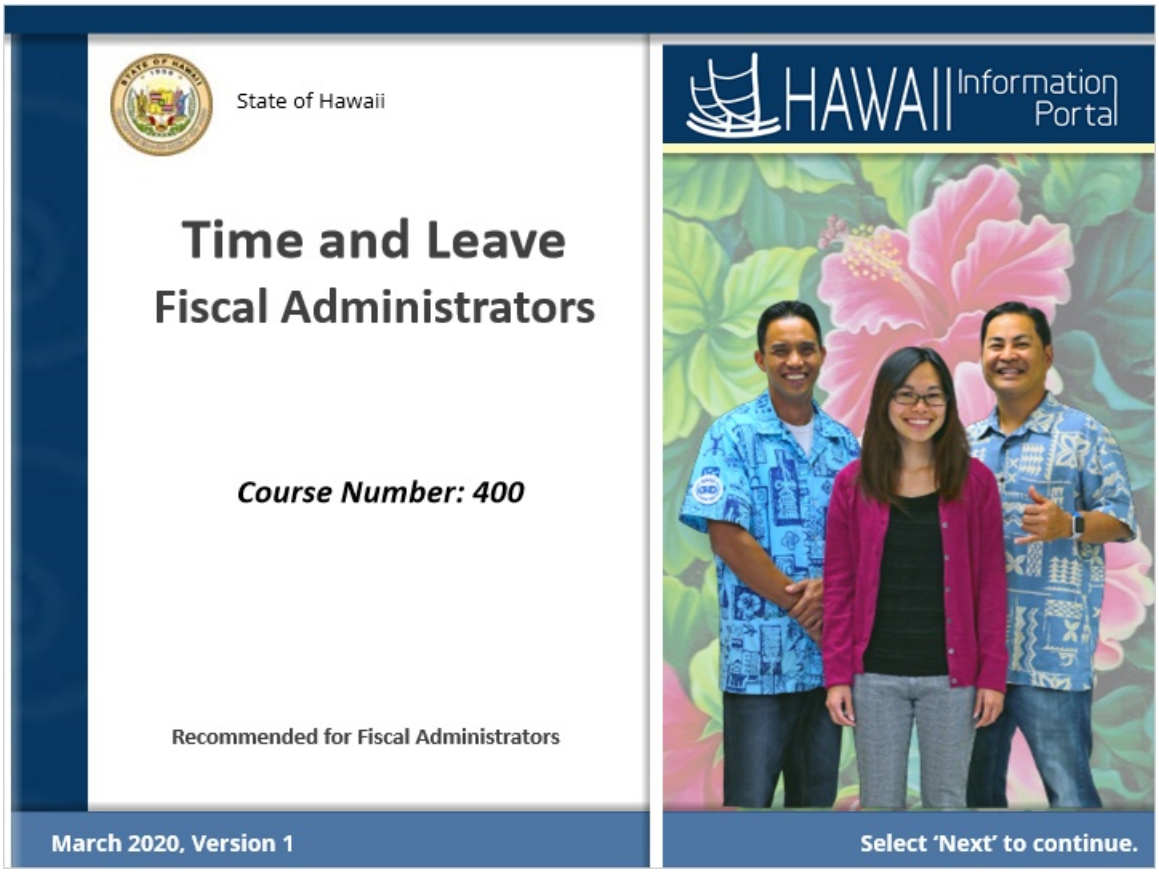
400 - Fiscal Administrator



Duration

This course will take approximately one hour.

You can complete it all today or by sections.

It's really up to you.

You can take the training how it best fits in your schedule.

Avoid Distraction

It is recommended that you avoid distractions during your training session. You should close all other applications including your email while taking the course and silence your cell phone.

Table of Contents

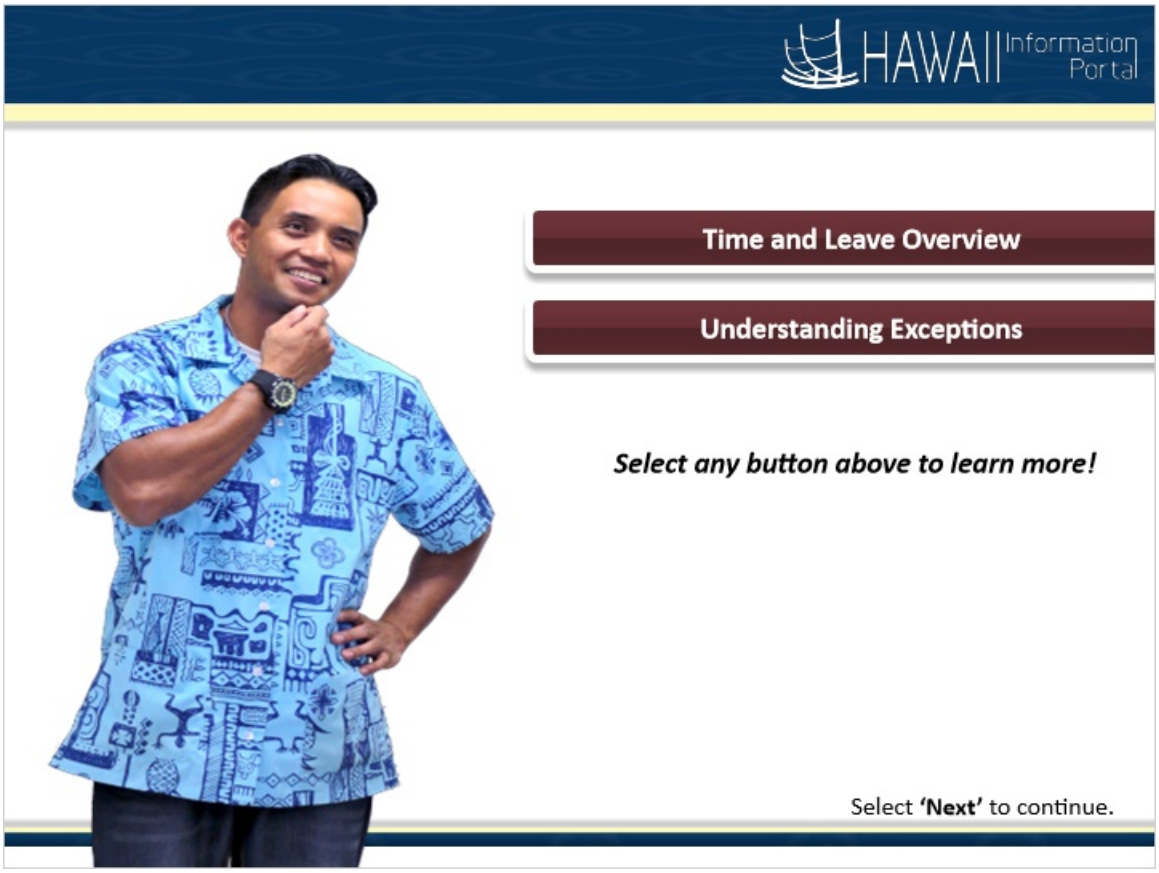
- Course Objective
- Time and Leave Overview
- Time and Labor Work Center
- Monthly Calendar
- Reports

Objectives

After completing this course you will understand how to:

- Time and Leave Overview
- Navigate through the Work Center
    - View Overtime Request
    - View Payable Time
- View the Monthly Calendar
- Run Queries

Time and Leave Overview



Time and Leave Overview

Understanding Exceptions

Select any button above to learn more!

Time and Leave Approval Overview

Lesson Scenario

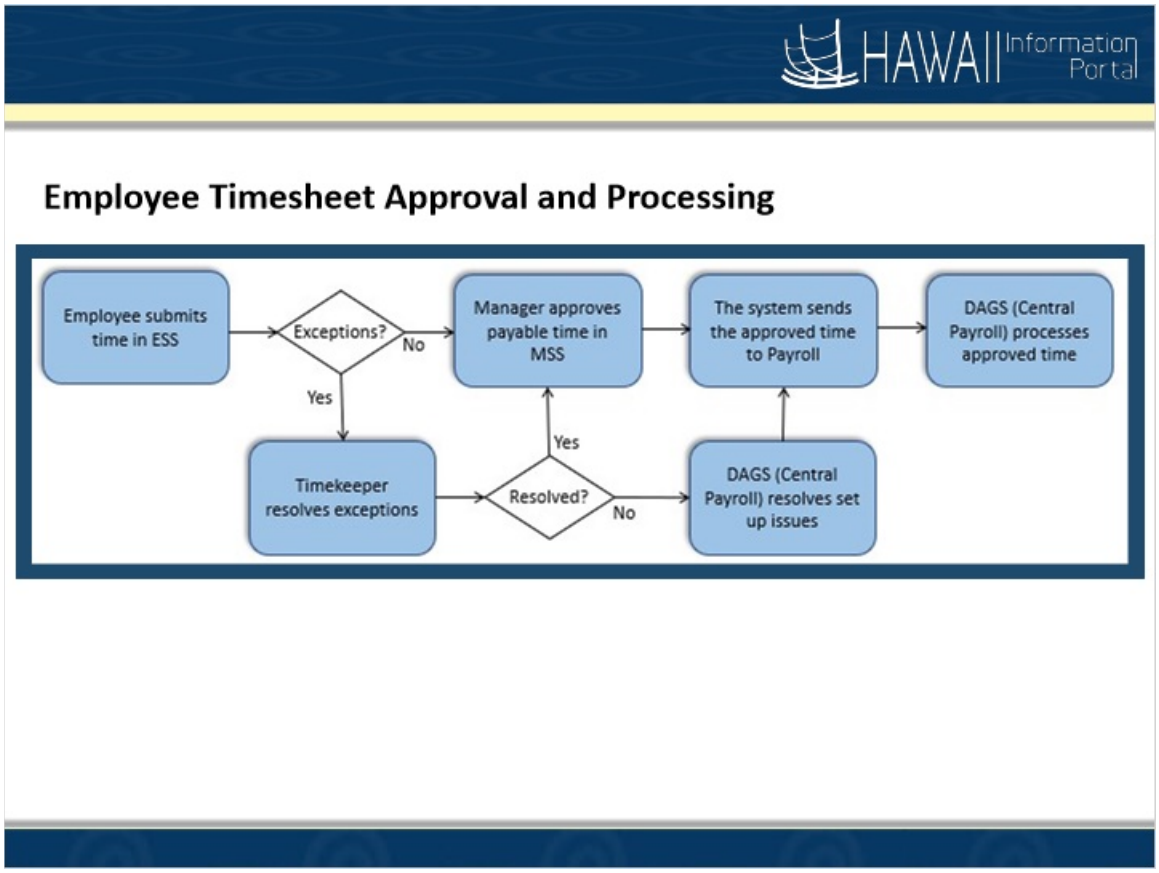
In this lesson, you will learn about the approval process in HIP.

The Approval Process in HIP

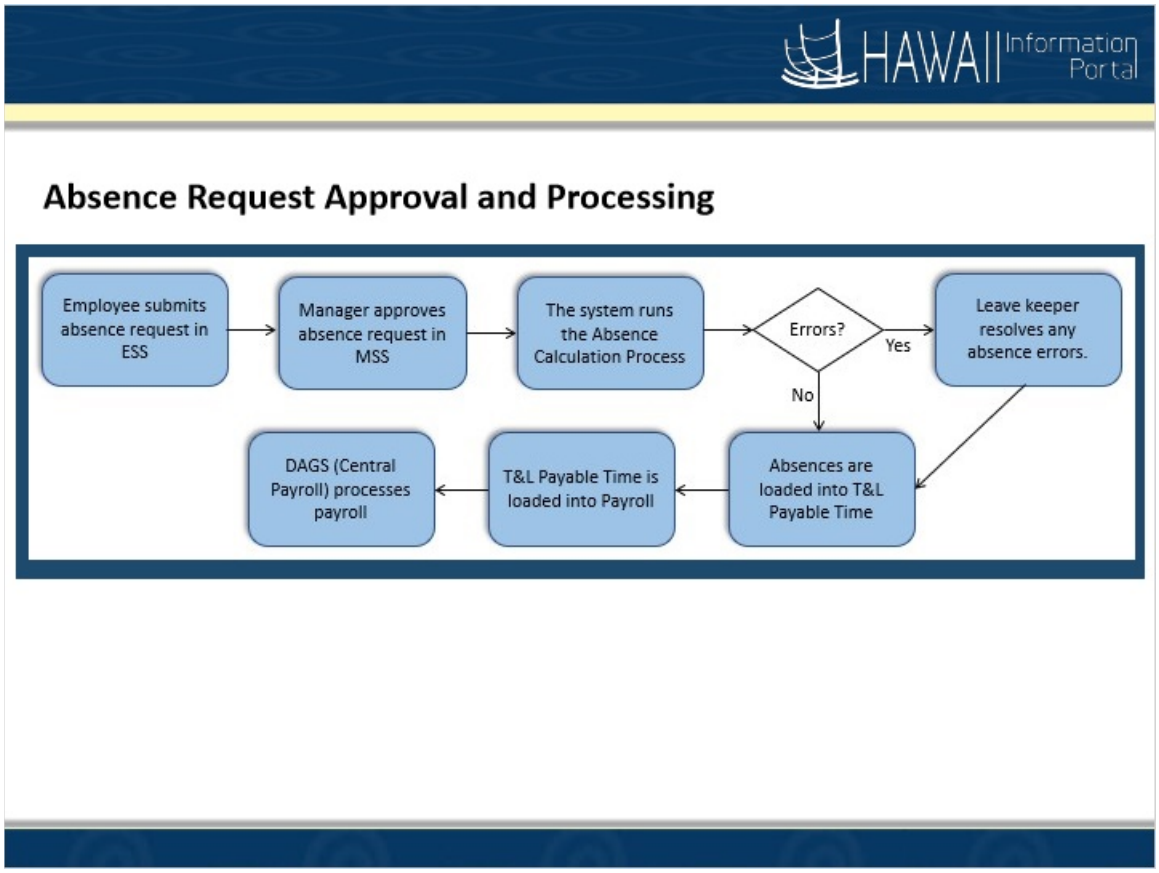
Certain transactions in HIP are required to be approved. For example,

- An employee's timesheet must be approved in order for the employee to be paid.
- An approval is required when an employee submits a request to work overtime.
- Leave requests must also be approved.

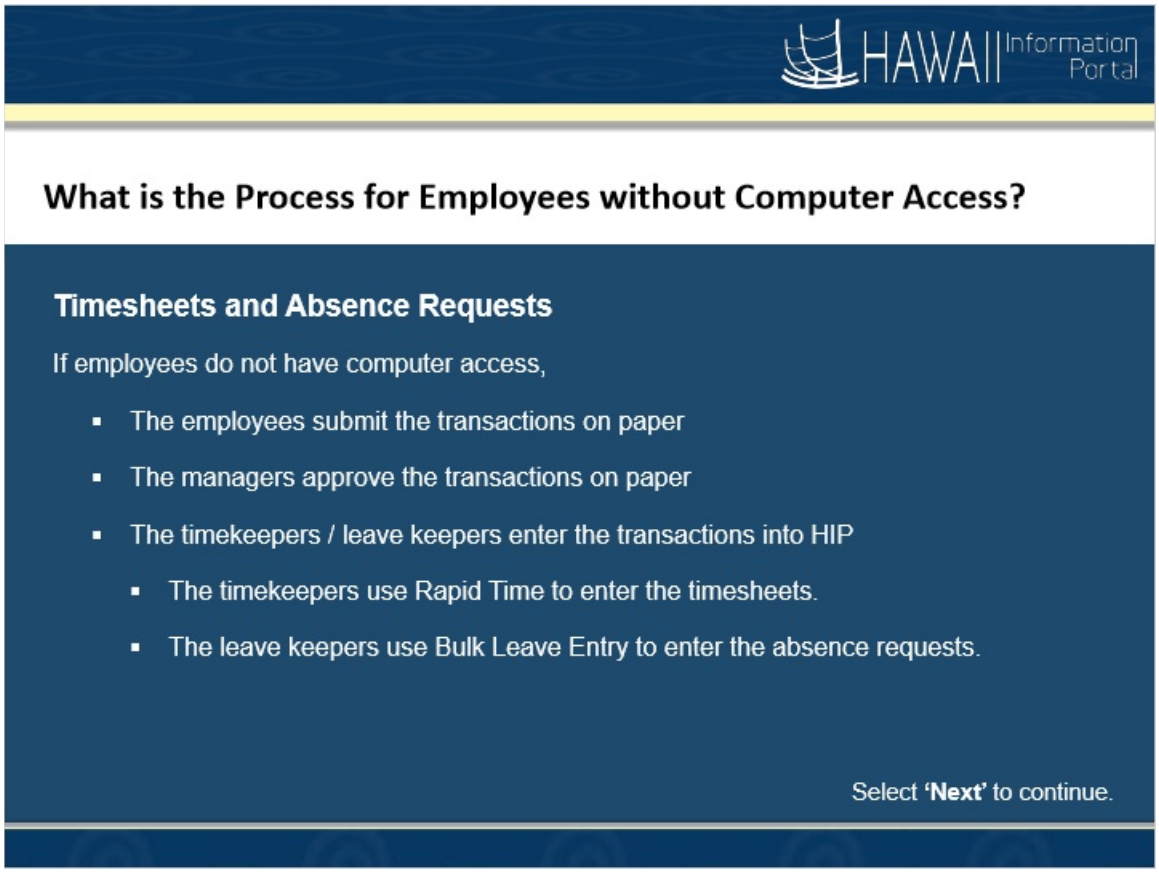
All approvals can be managed in the Manager Self Service (MSS) page.



Employee Timesheet Approval and Processing



Absence Request Approval and Processing



What is the Process for Employees without Computer Access?

Timesheets and Absence Requests

If employees do not have computer access,

- The employees submit the transactions on paper
- The managers approve the transactions on paper
- The timekeepers / leave keepers enter the transactions into HIP
    - The timekeepers use Rapid Time to enter the timesheets.
    - The leave keepers use Bulk Leave Entry to enter the absence requests.

Who Approves the Time and Leave Transactions?

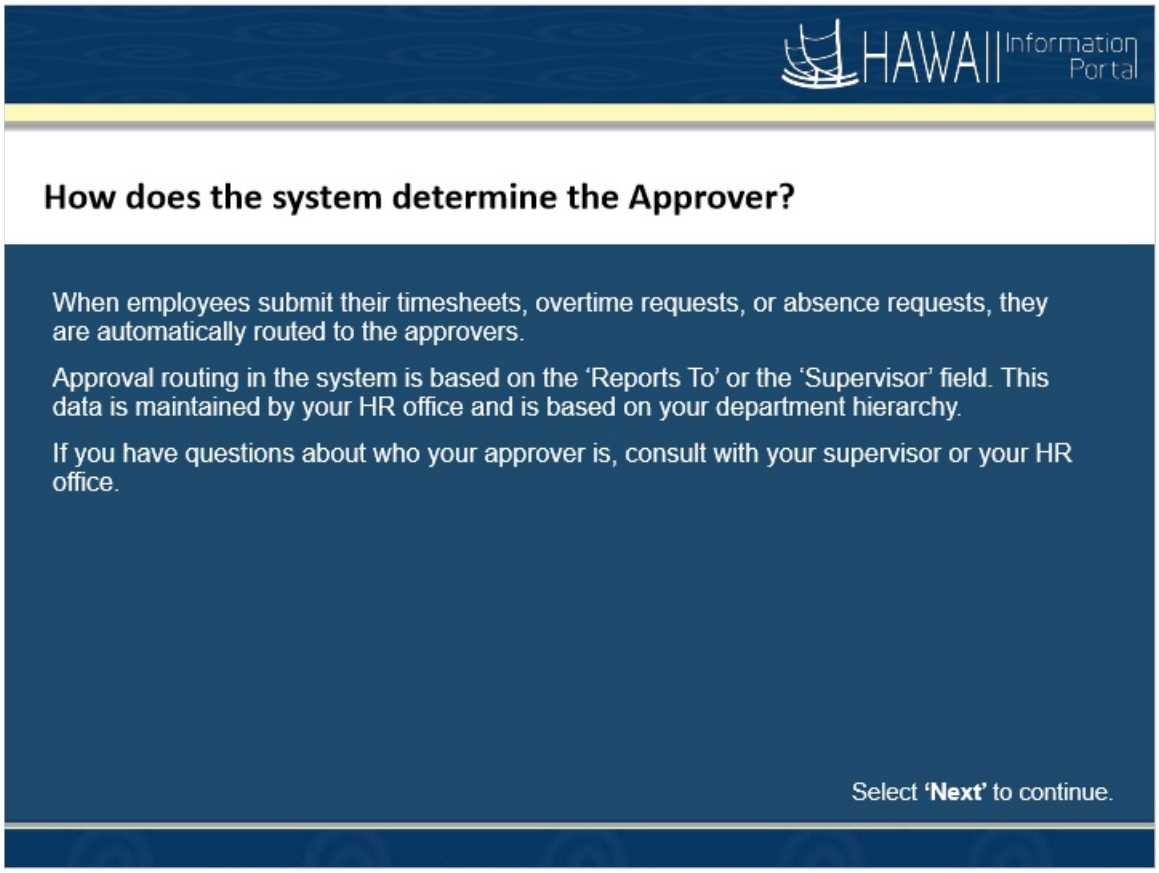
Time Approvals:

Approvals are required for payable time and for requests to work overtime.

These transactions are routed to employee's supervisor/time manager. This data is stored in the Reports To/Supervisor field in HIP. Your HR office maintains this data.

Leave Approvals:

Absence approvals are routed either to the employee's Reports To/Supervisor or to the HR Admin based on the type of absence. Examples of absences approved by the HR Admin: military leave, workers compensation, and leave donations.



How does the system determine the Approver?

When employees submit their timesheets, overtime requests, or absence requests, they are automatically routed to the approvers.

Approval routing in the system is based on the 'Reports To' or the 'Supervisor' field. This data is maintained by your HR office and is based on your department hierarchy.

If you have questions about who your approver is, consult with your supervisor or your HR office.

Congratulations!

You've successfully completed this lesson.

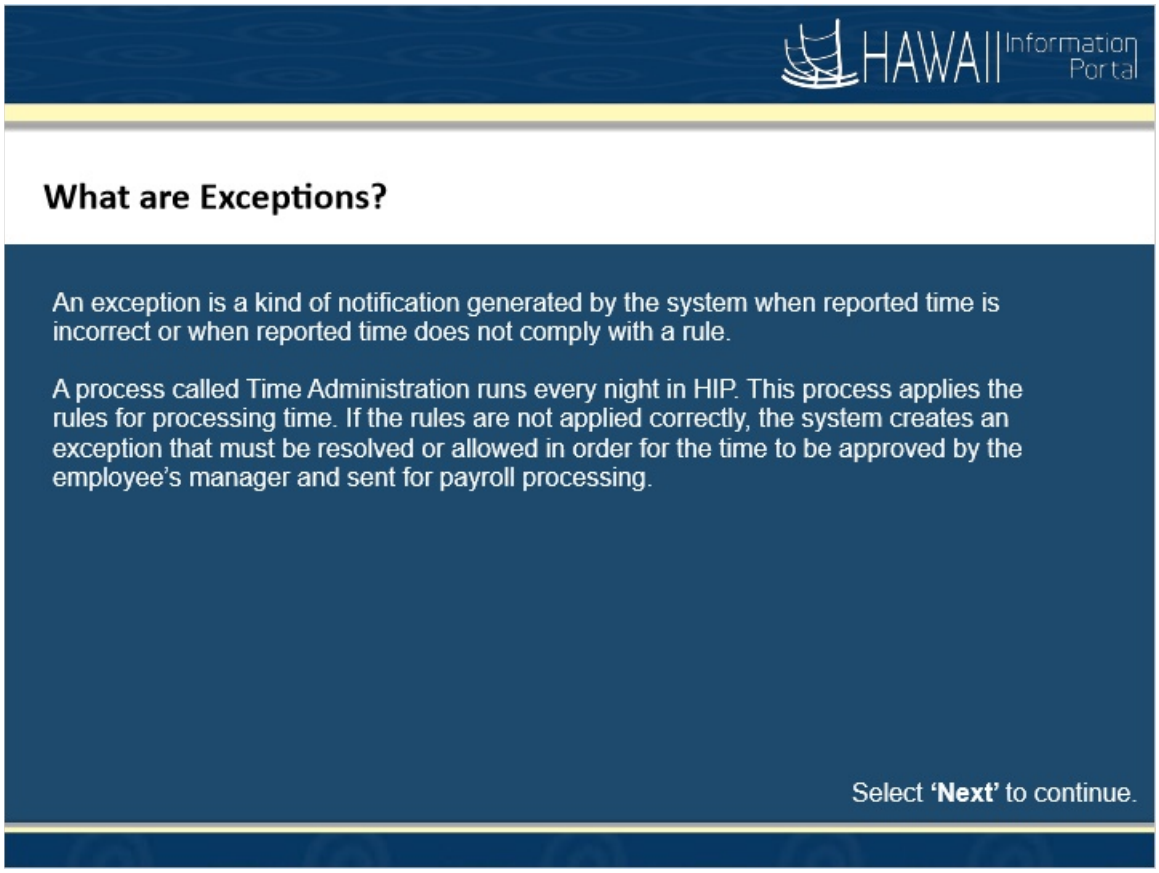
Understand Exceptions

Understand Exceptions

Lesson Scenario

In this lesson, you will learn to understand exceptions.

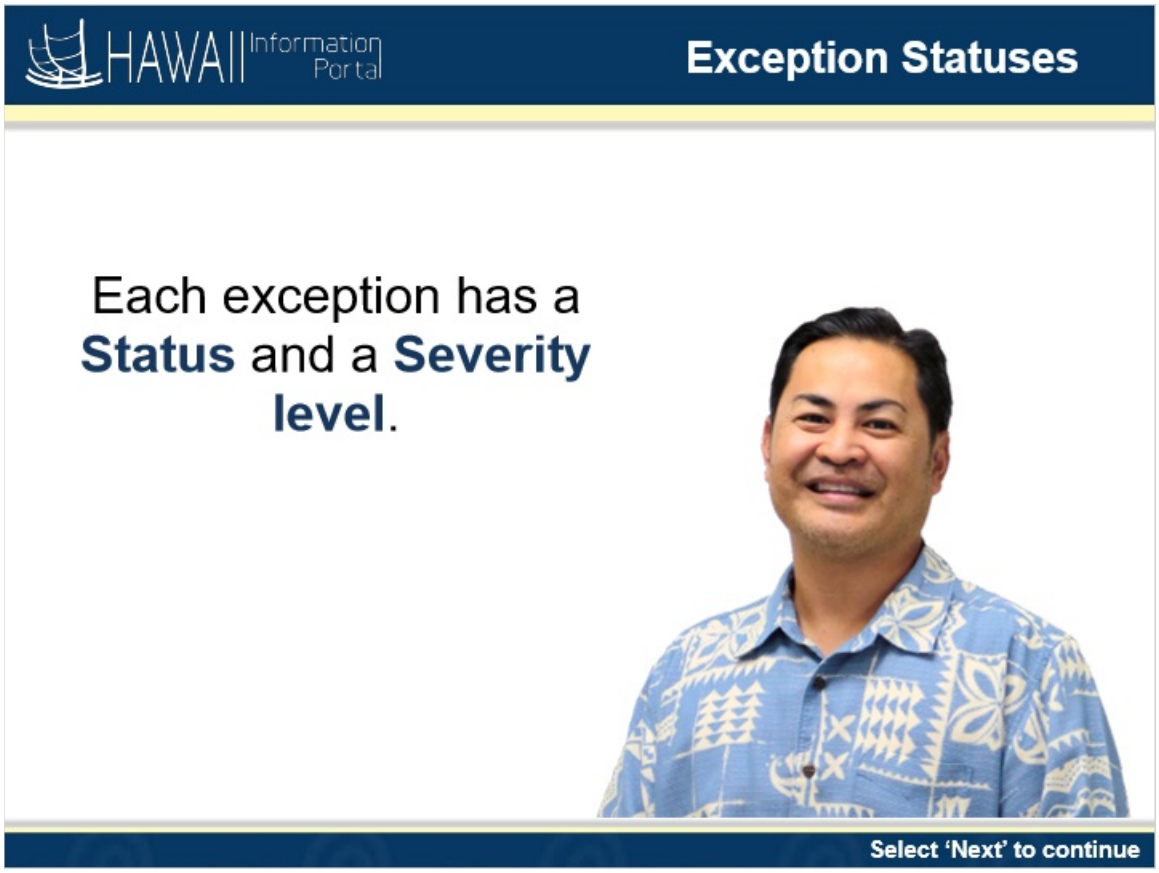
Managers will be able to view exceptions for their direct reports; however, Timekeepers will resolve all exceptions.



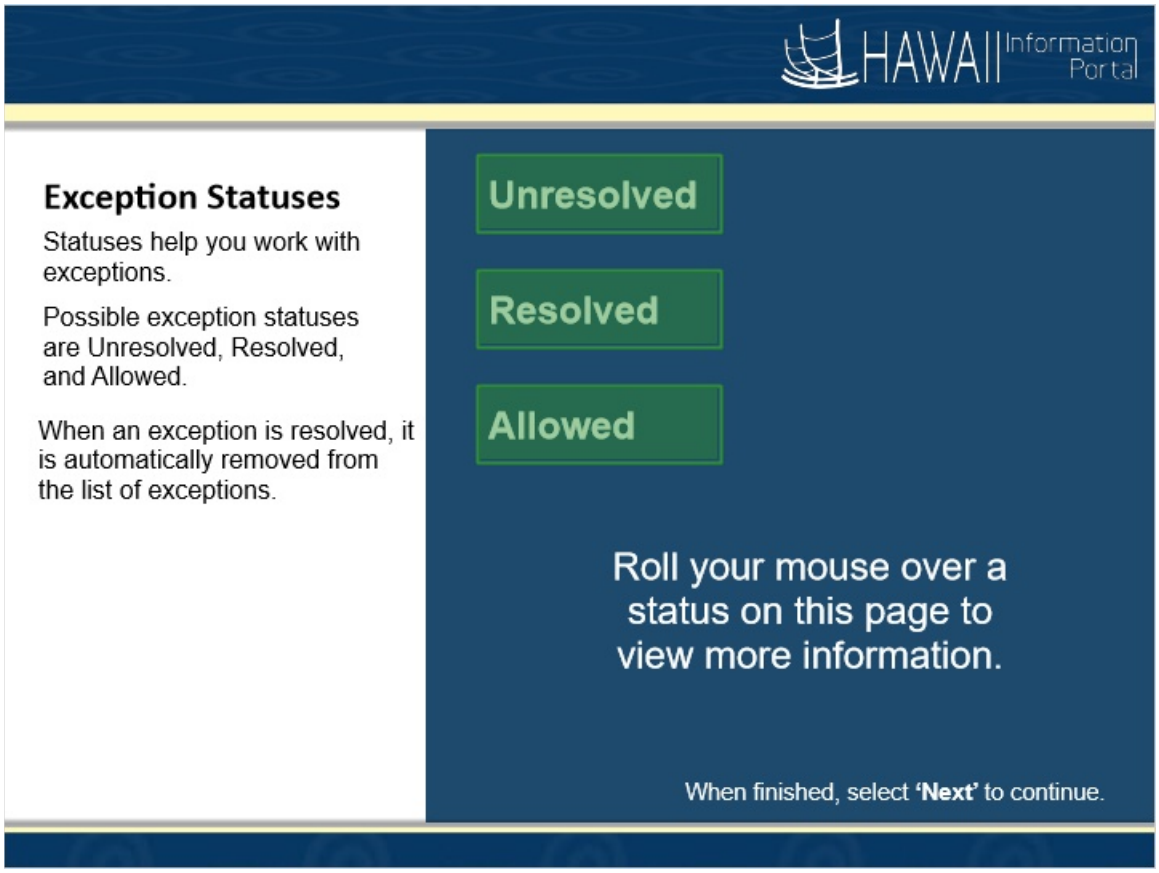
What are Exceptions?

An exception is a kind of notification generated by the system when reported time is incorrect or when reported time does not comply with a rule.

A process called Time Administration runs every night in HIP. This process applies the rules for processing time. If the rules are not applied correctly, the system creates an exception that must be resolved or allowed in order for the time to be approved by the employee's manager and sent for payroll processing.



Each exception has a **Status** and a **Severity level**.



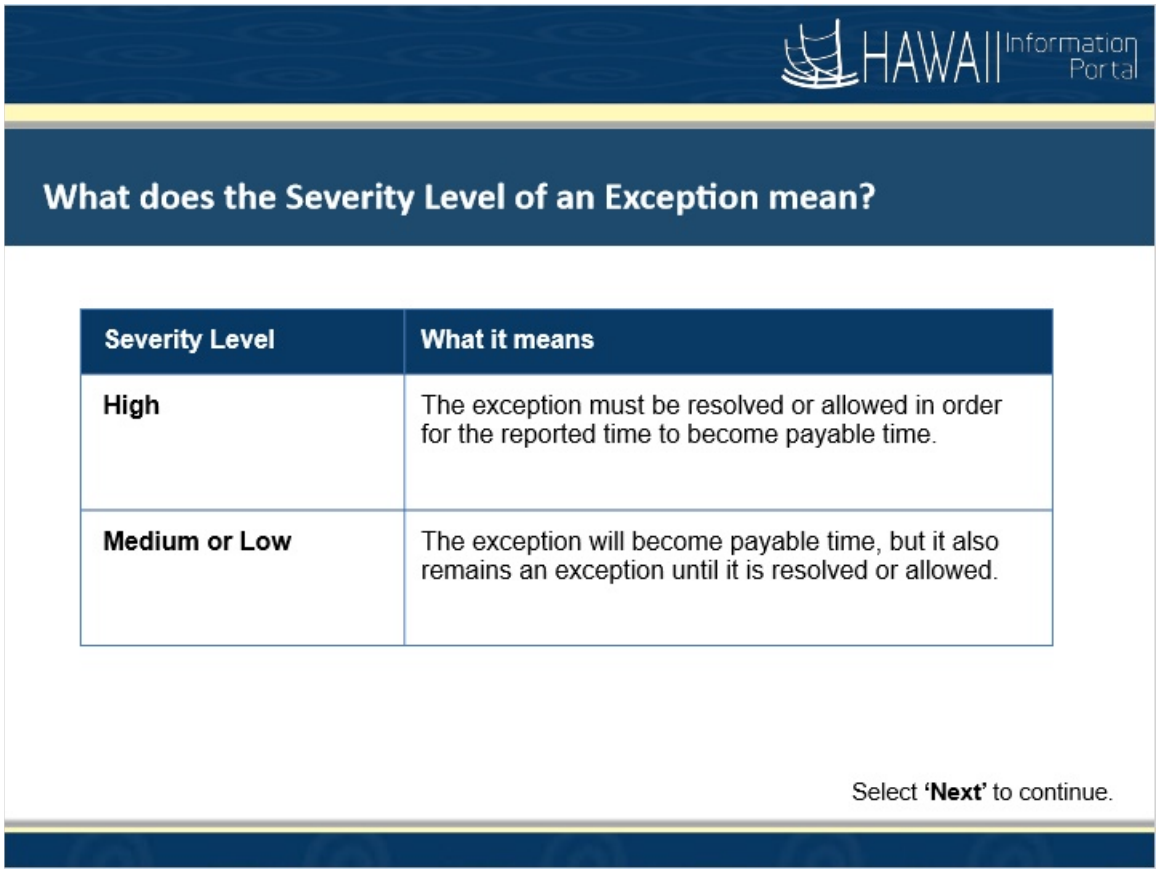
Exception Statuses

Statuses help you work with exceptions.

Possible exemption statuses are Unresolved, Resolved, and Allowed.

When an exception is resolved, it is automatically removed from the list of exceptions.

- Unresolved- When an exemption is created, the status of the exemption is Unresolved.
- Resolved- When the exception condition no longer exists, the status of the exemption changes to Resolved.
- Allowed- Indicates the timekeeper allowed the exception, which generates payable time without resolving the exception.

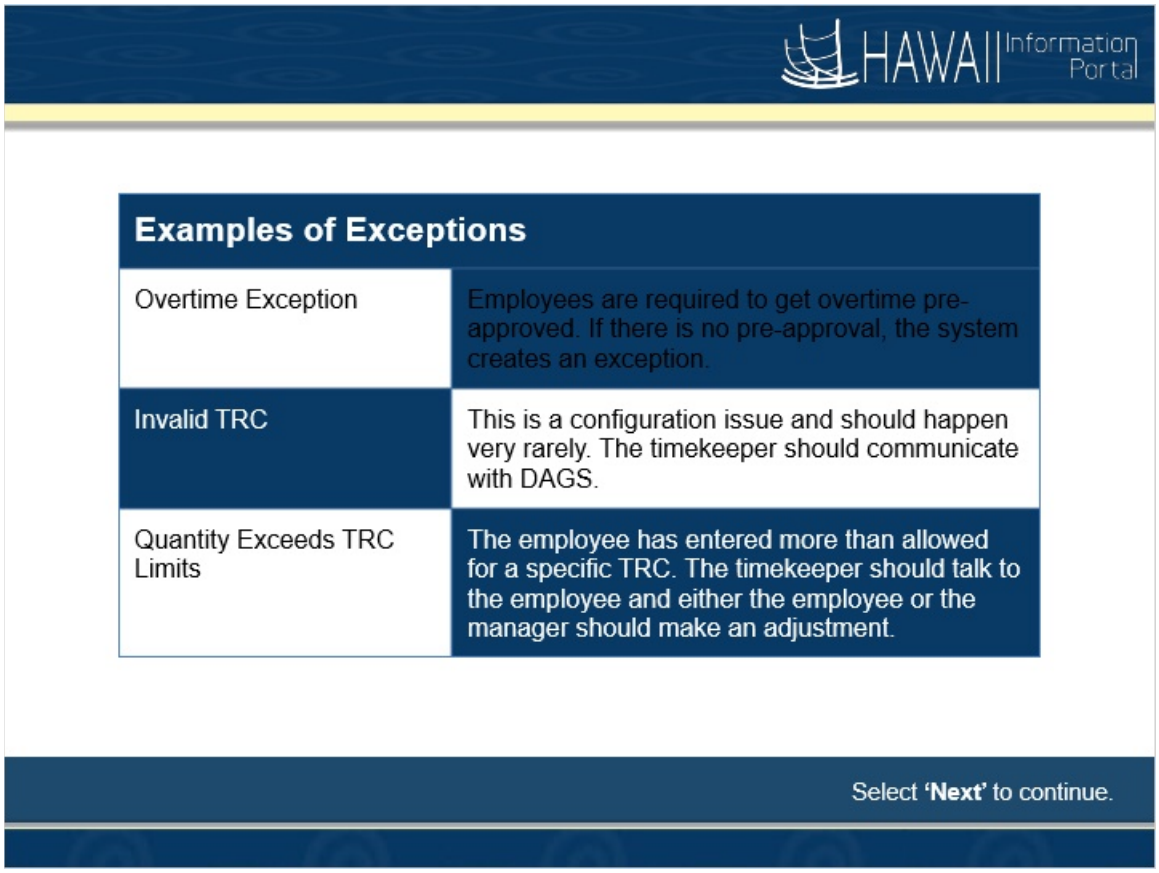


What does the Severity Level of an Exception mean?

High - The exception must be resolved or allowed in order for the reported time to become payable time.

Medium or Low - The exception will become payable time, but it also remains an exception until it is resolved or allowed.

What are some examples of exceptions?

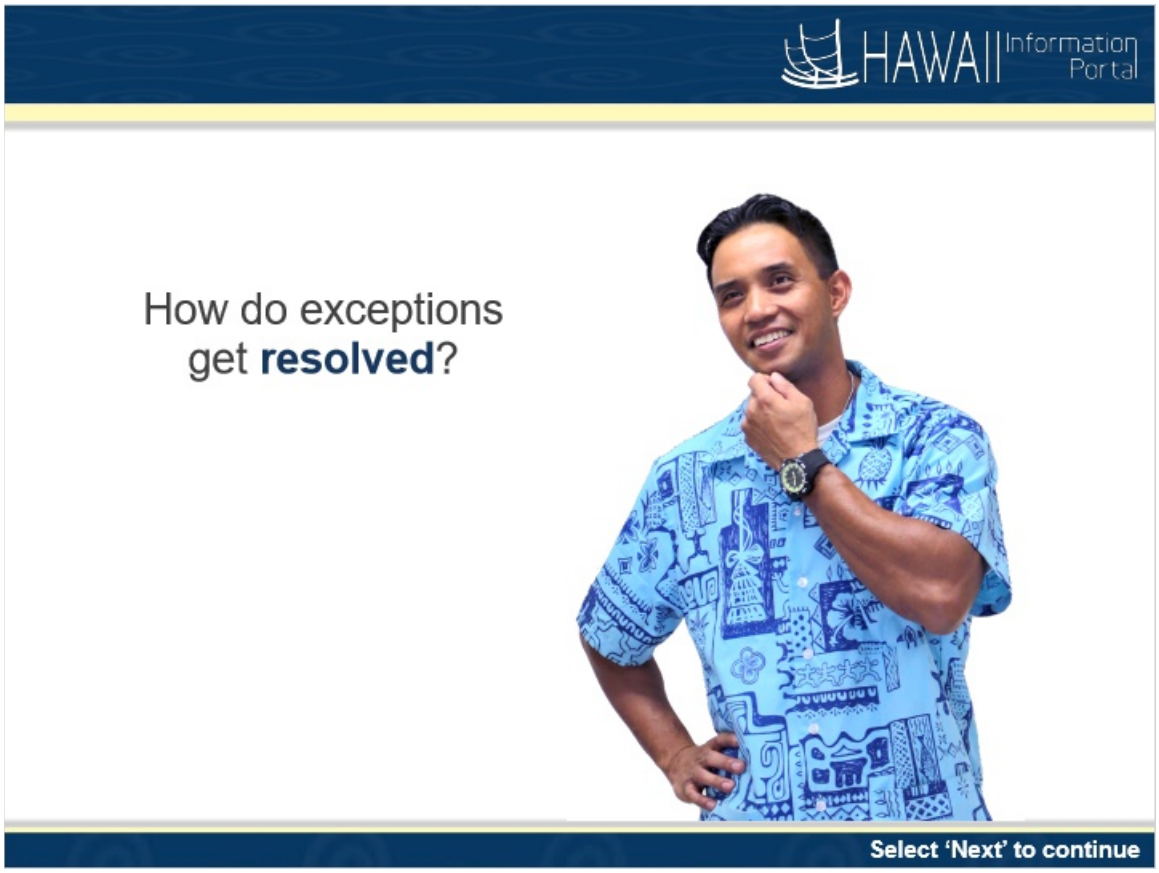


Examples of Exceptions

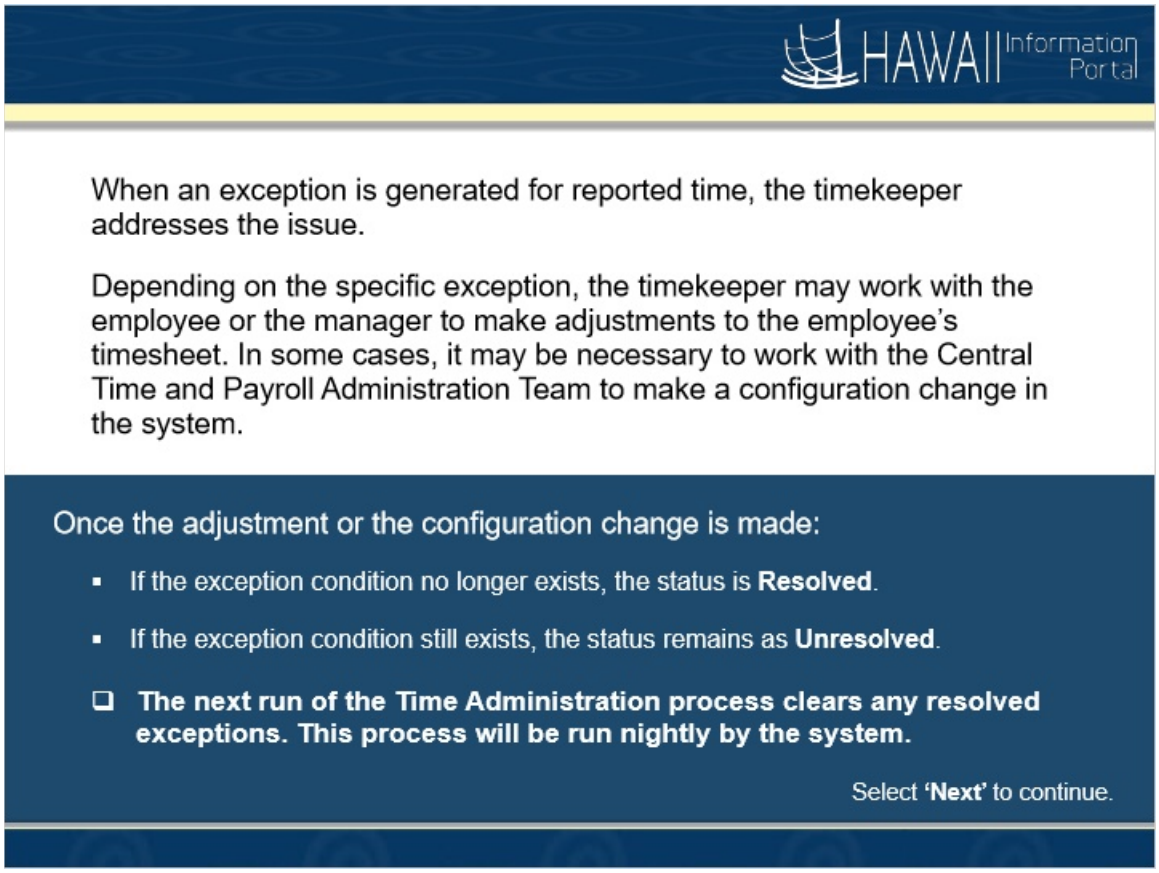
Overtime Exception: Employees are required to get overtime pre-approved. If there is no pre-approval, the system creates an exception.

Invalid TRC: This is a configuration issue and should happen very rarely. The timekeeper should communicate with DAGS.

Quantity Exceeds TRC Limits: The employee has entered more than allowed for a specific TRC. The timekeeper should talk to the employee and either the employee or the manager should make an adjustment.



How do exceptions get resolved?



When an exception is generated for reported time, the timekeeper addresses the issue.

Depending on the specific exception, the timekeeper may work with the employee or the manager to make adjustments to the employee's timesheet. In some cases, it may be necessary to work with the Central Time and Payroll Administration Team to make a configuration change in the system.

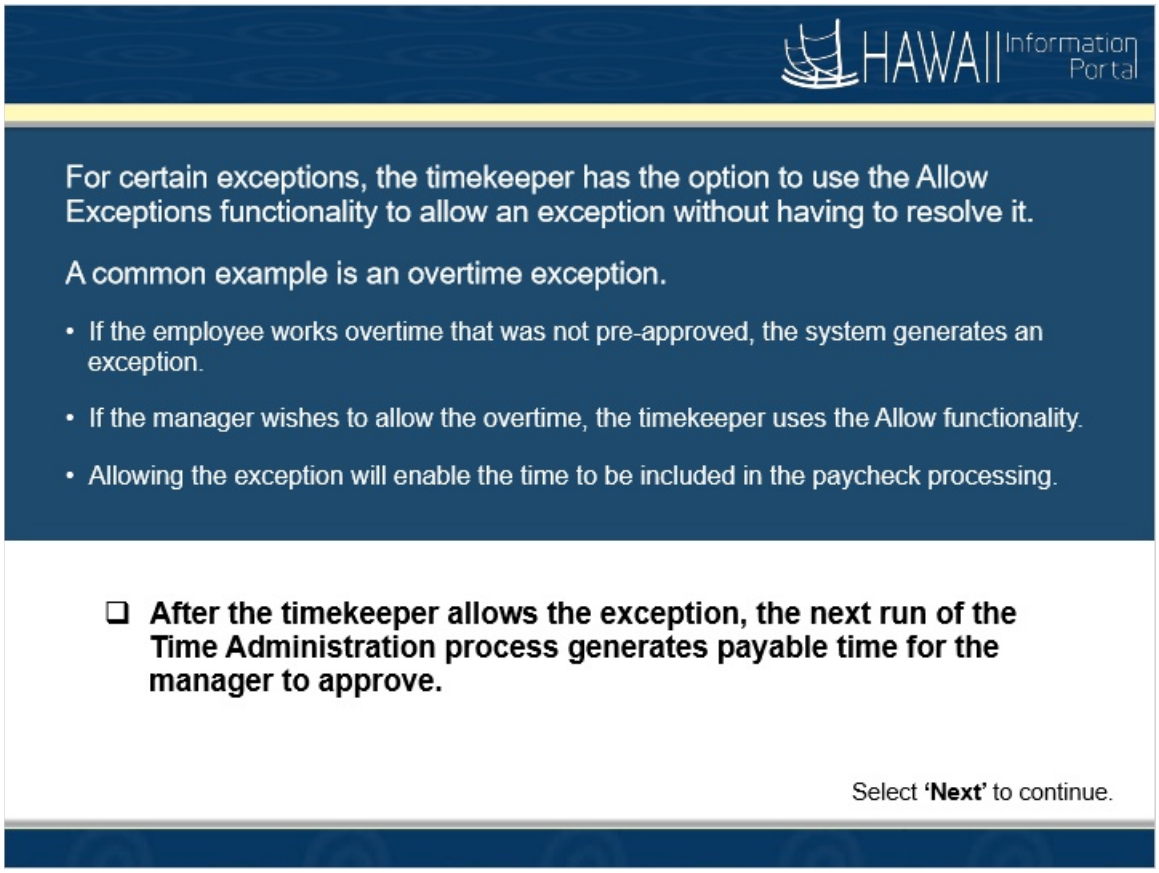
Once the adjustment or the configuration change is made:

If the exception condition no longer exists, the status is **Resolved**.

If the exception condition still exists, the status remains as **Unresolved**.

The next run of the Time Administration process clears any resolved exceptions. This process will be run nightly by the system.

What does it mean to **allow** an exception?



For certain exceptions, the timekeeper has the option to use the Allow Exceptions functionality to allow an exception without having to resolve it.

A common example is an overtime exception.

If the employee works overtime that was not pre-approved, the system generates an exception.

If the manager wishes to allow the overtime, the timekeeper uses the Allow functionality.

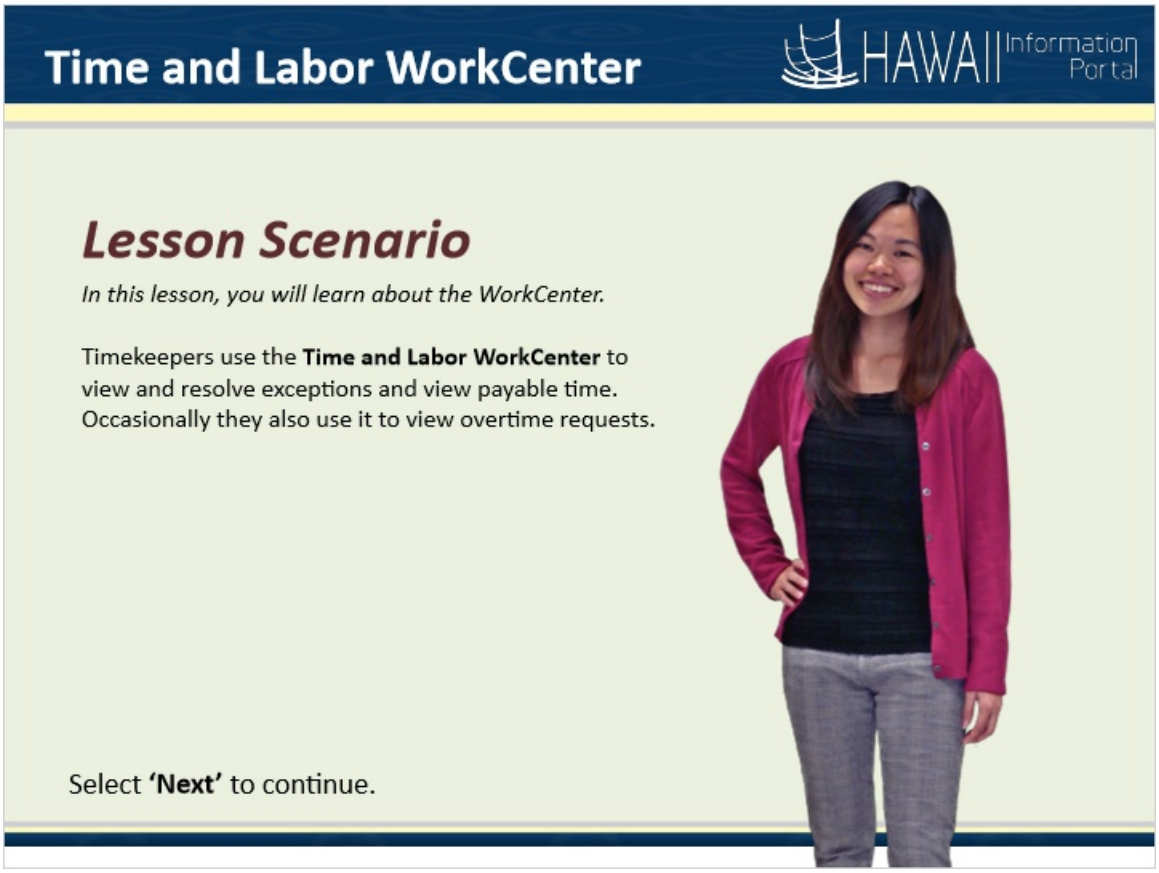
Allowing the exception will enable the time to be included in the paycheck processing.

After the timekeeper allows the exception, the next run of the Time Administration process generates payable time for the manager to approve.

Congratulations!

You've successfully completed this lesson.

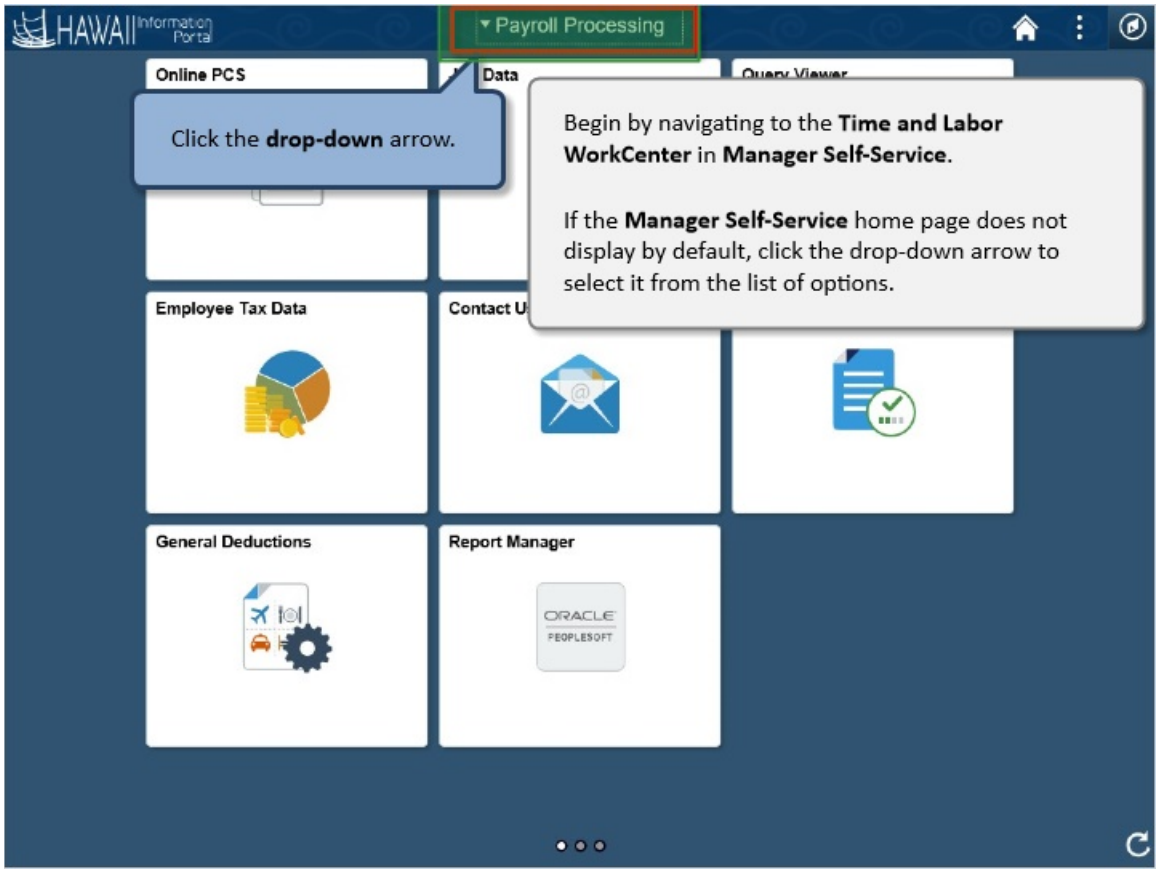
Time and Labor WorkCenter



Lesson Scenario

In this lesson, you will learn about the WorkCenter.

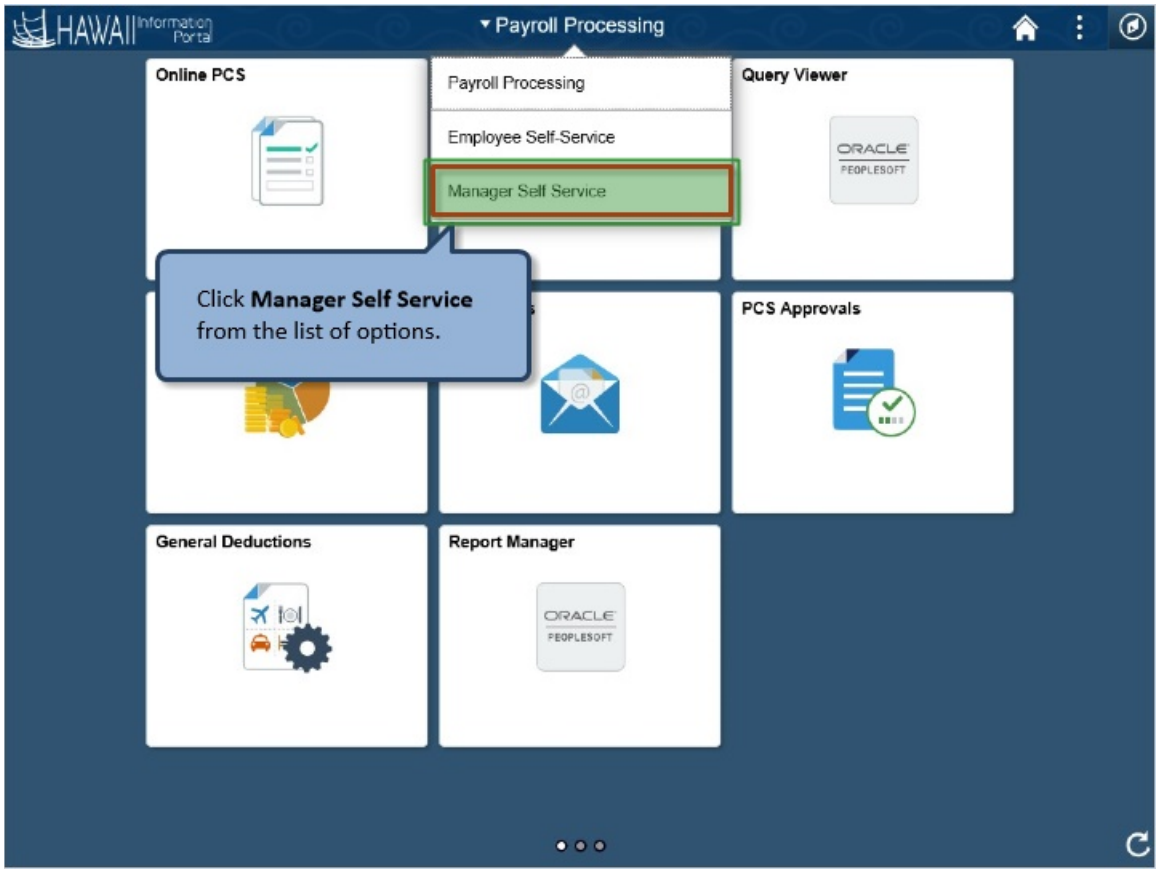
Timekeepers use the Time and Labor WorkCenter to view and resolve exceptions and view payable time. Occasionally they also use it to view overtime requests.



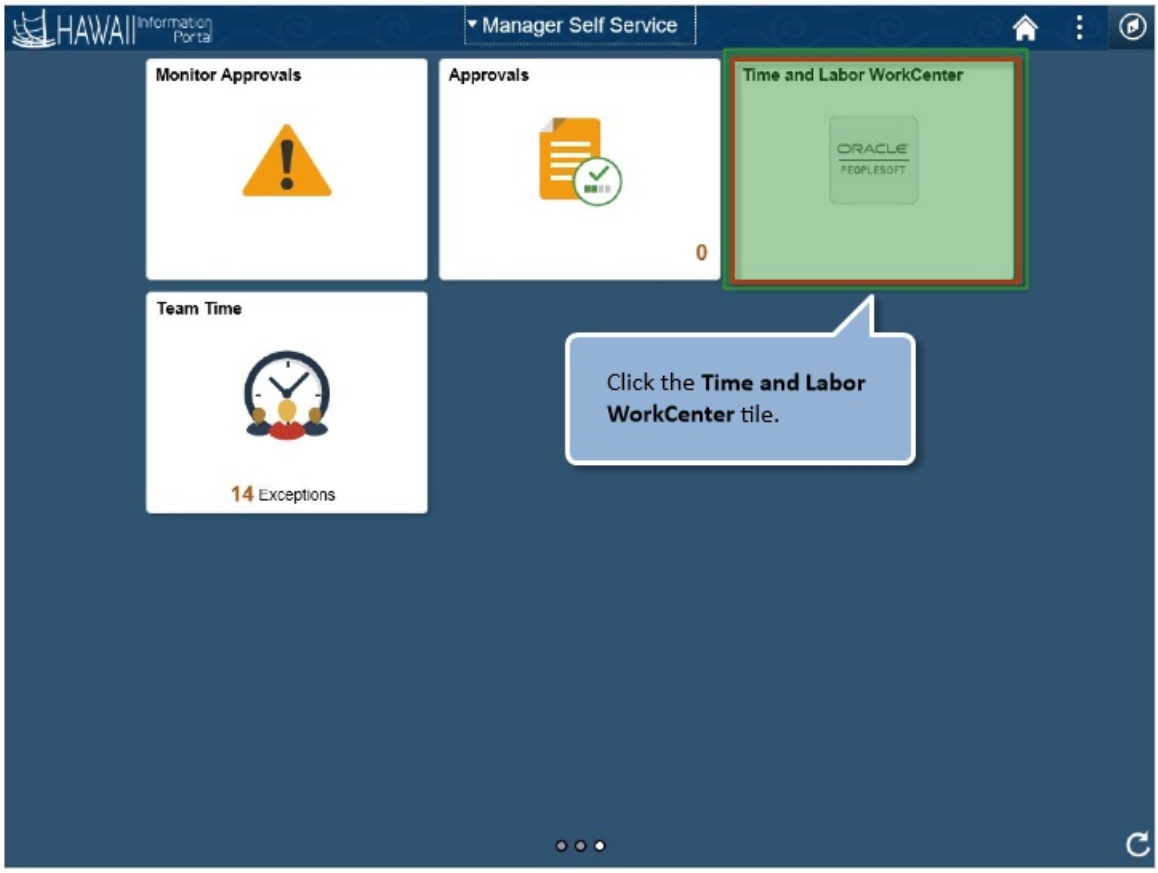
Begin by navigating to the Time and Labor WorkCenter in Manager Self Service.

If the Manager Self Service home page does not display by default, click the drop-down arrow to select it from the list of options.

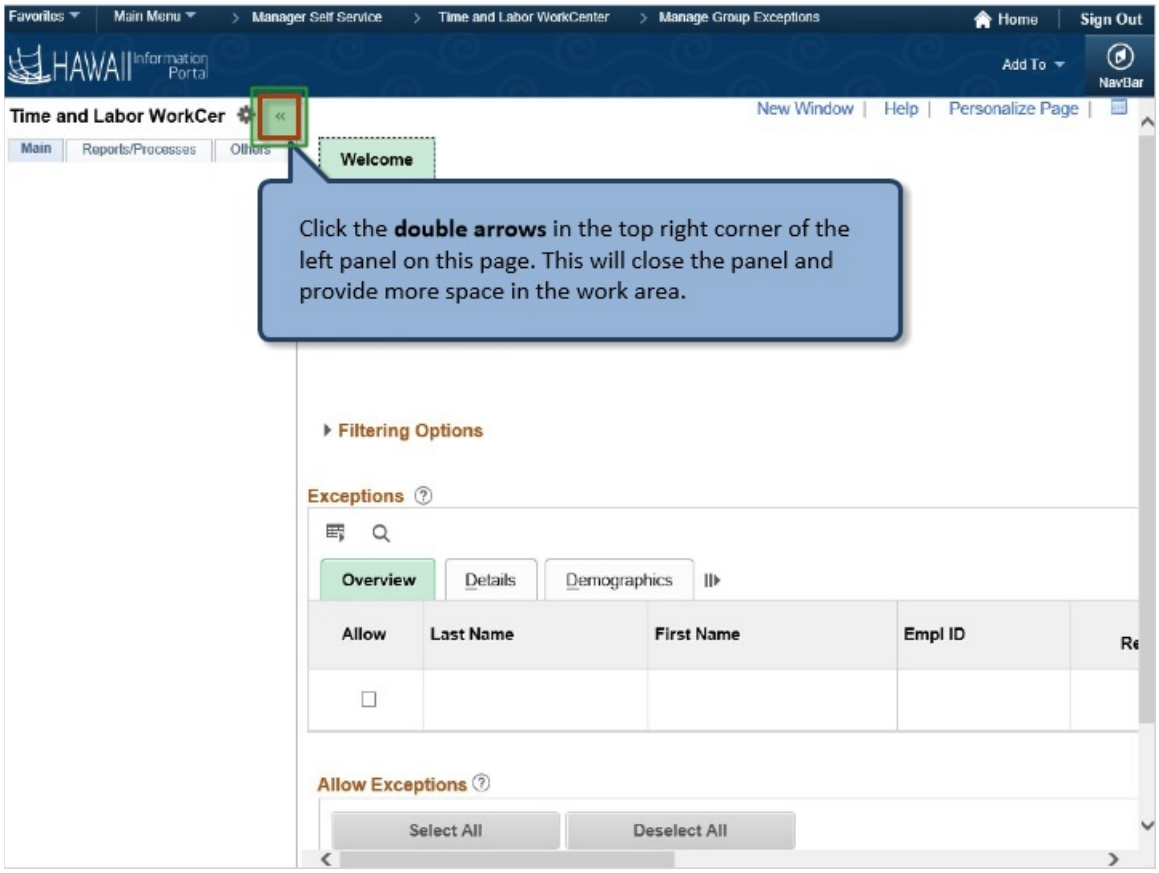
Click the drop-down arrow.



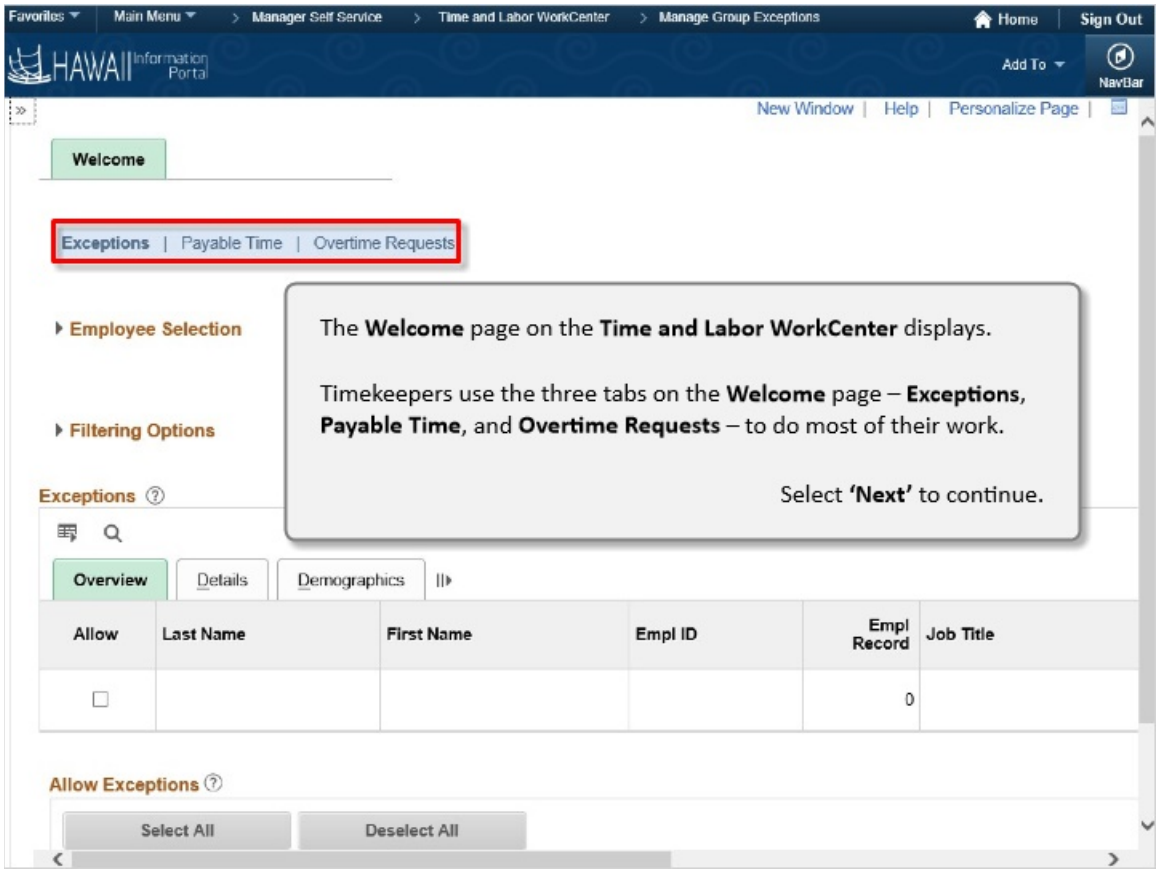
Click Manager Self Service from the list of options.



Click the Time and Labor WorkCenter tile.

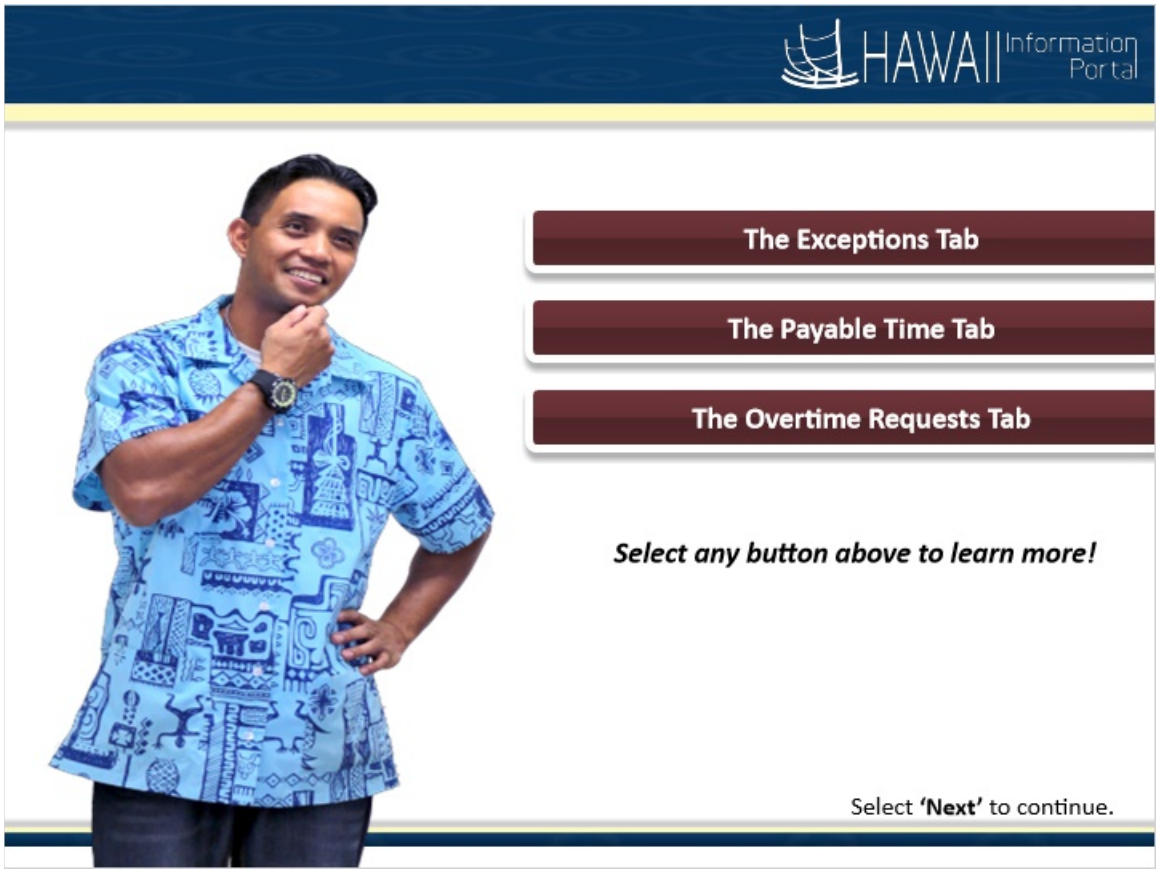


Click the double arrows in the top right corner of the left panel on this page. This will close the panel and provide more space in the work area.



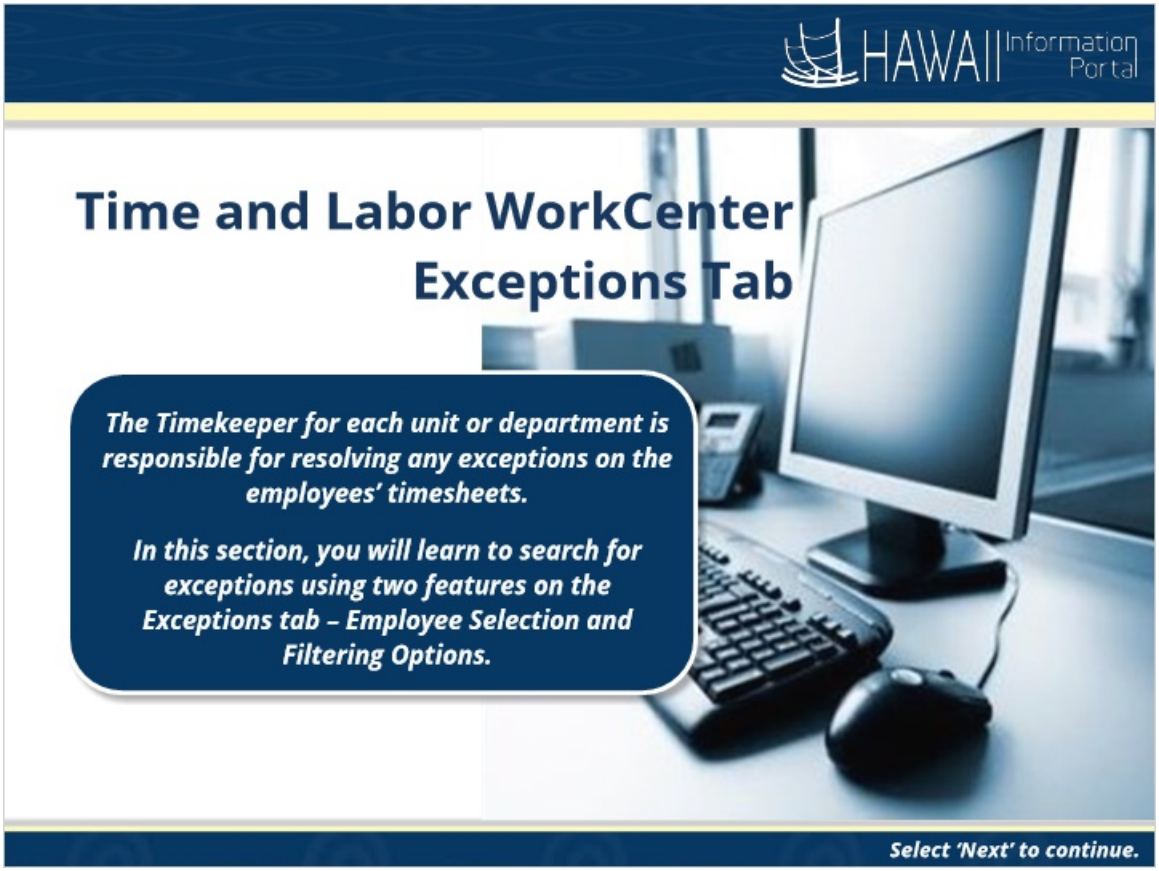
The Welcome page on the Time and Labor WorkCenter displays.

Timekeepers use the three tabs on the Welcome page - Exceptions, Payable Time, and Overtime Requests - to do most of their work.



- The Exceptions Tab
- The Payable Time Tab
- The Overtime Requests Tab

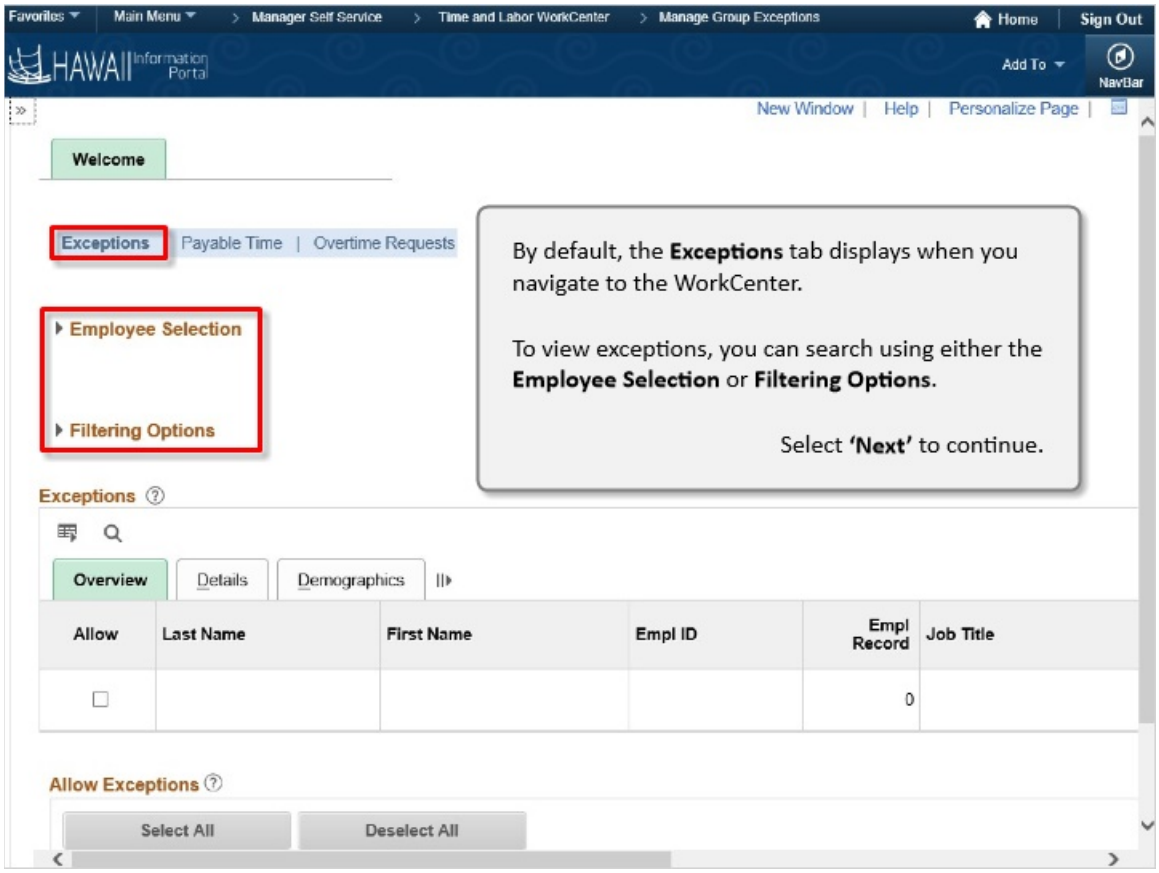
Select any button above to learn more!



The Exceptions Tab

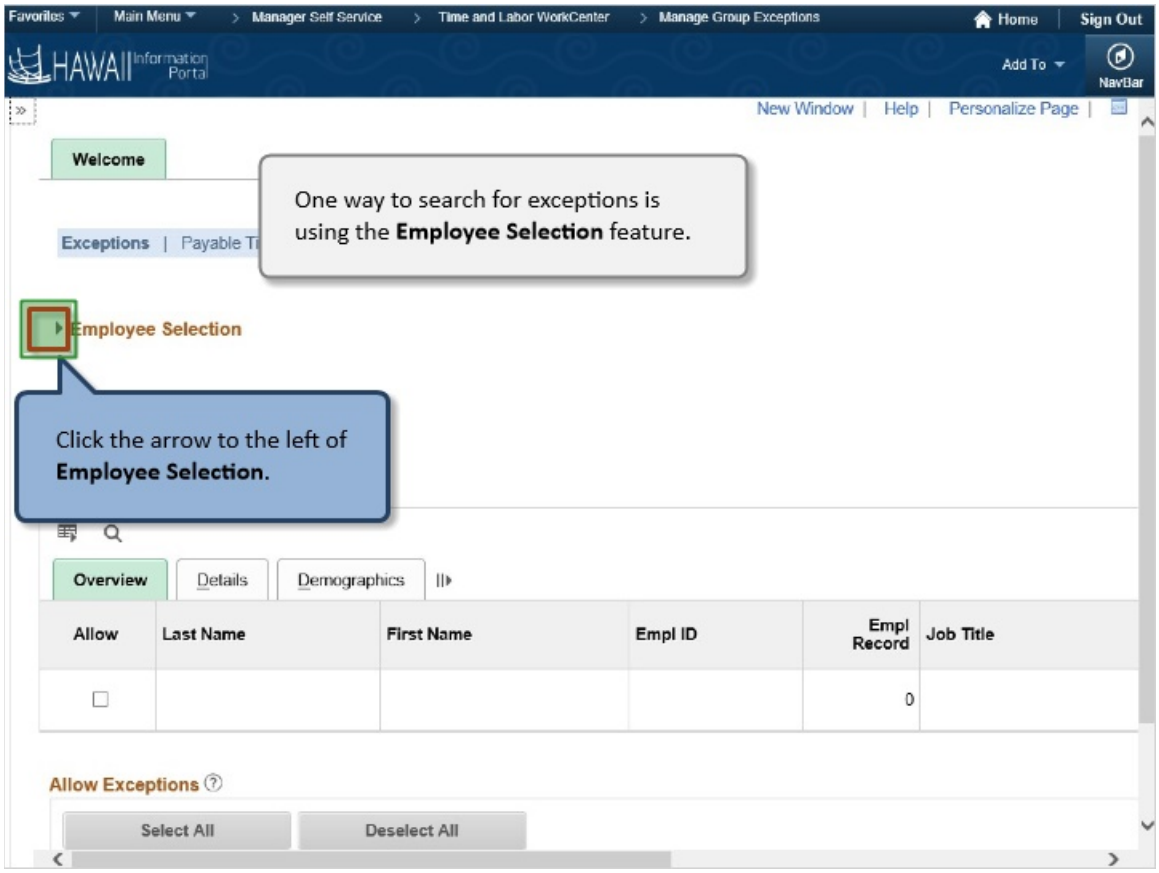
The Timekeeper for each unit or department is responsible for resolving any exceptions on the employees' timesheets.

In this section, you will learn to search for exceptions using two features on the Exceptions tab - Employee Selection and Filtering Options



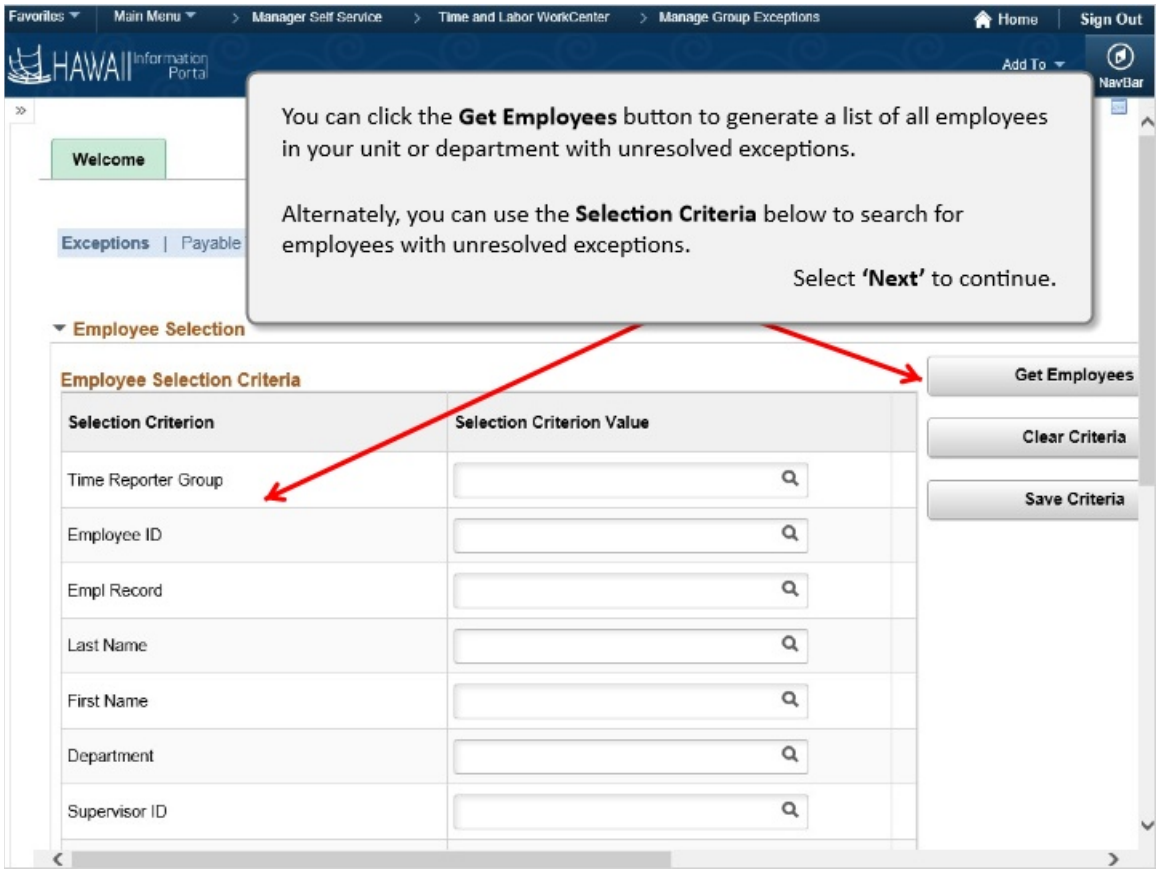
By default, the Exceptions tab displays when you navigate to the WorkCenter.

To view exceptions, you can search using either the Employee Selection or Filtering Options.



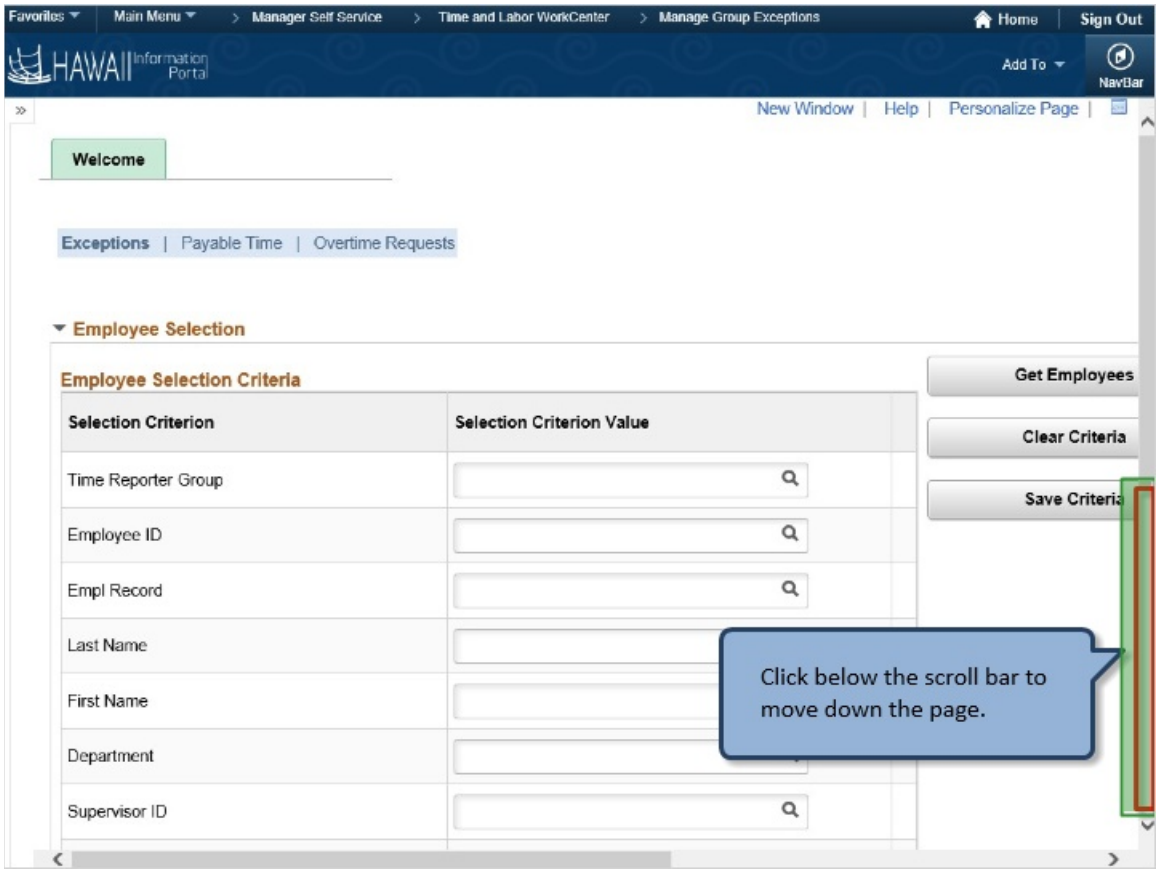
One way to search for exceptions is using the Employee Selection feature.

Click the arrow to the left of Employee Selection.

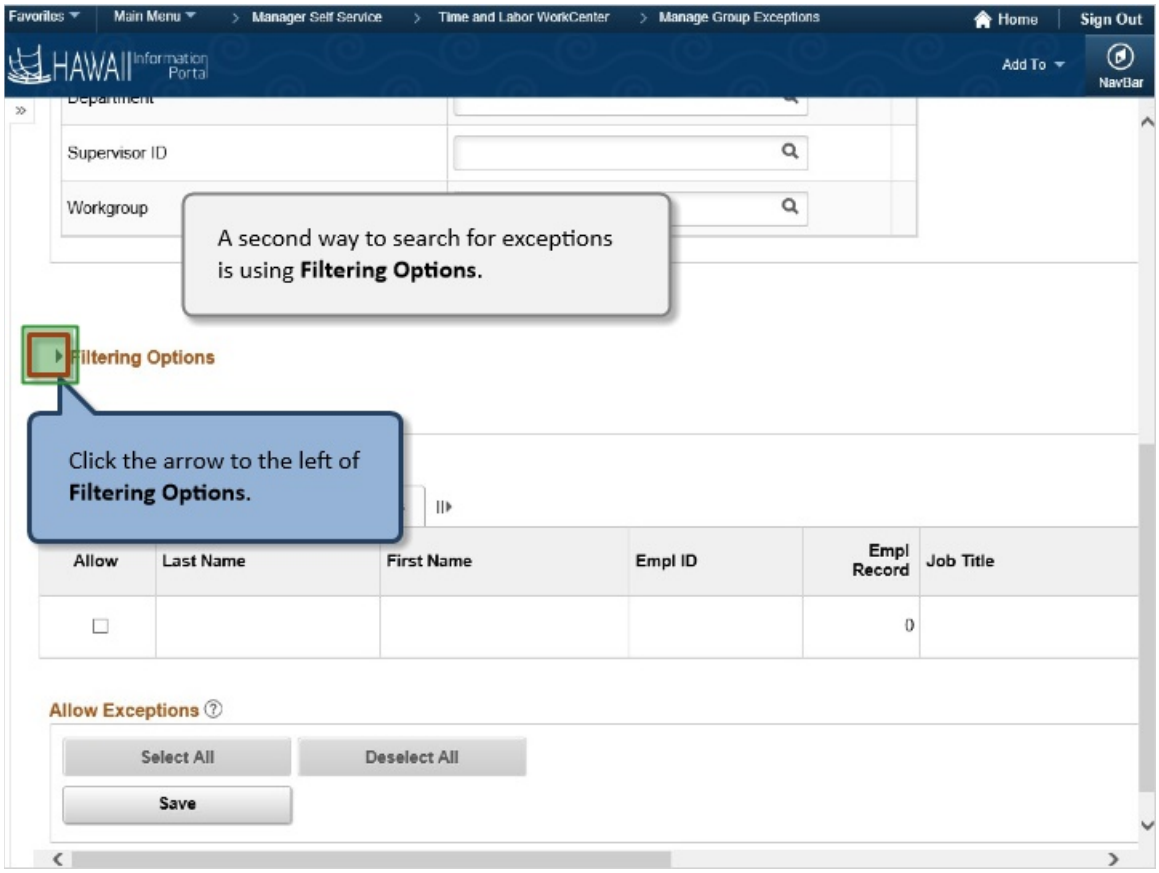


You can click the Get Employees button to generate a list of all employees in your unit or department with unresolved exceptions.

Alternately, you can use the Selection Criteria below to search for employees with unresolved exceptions.

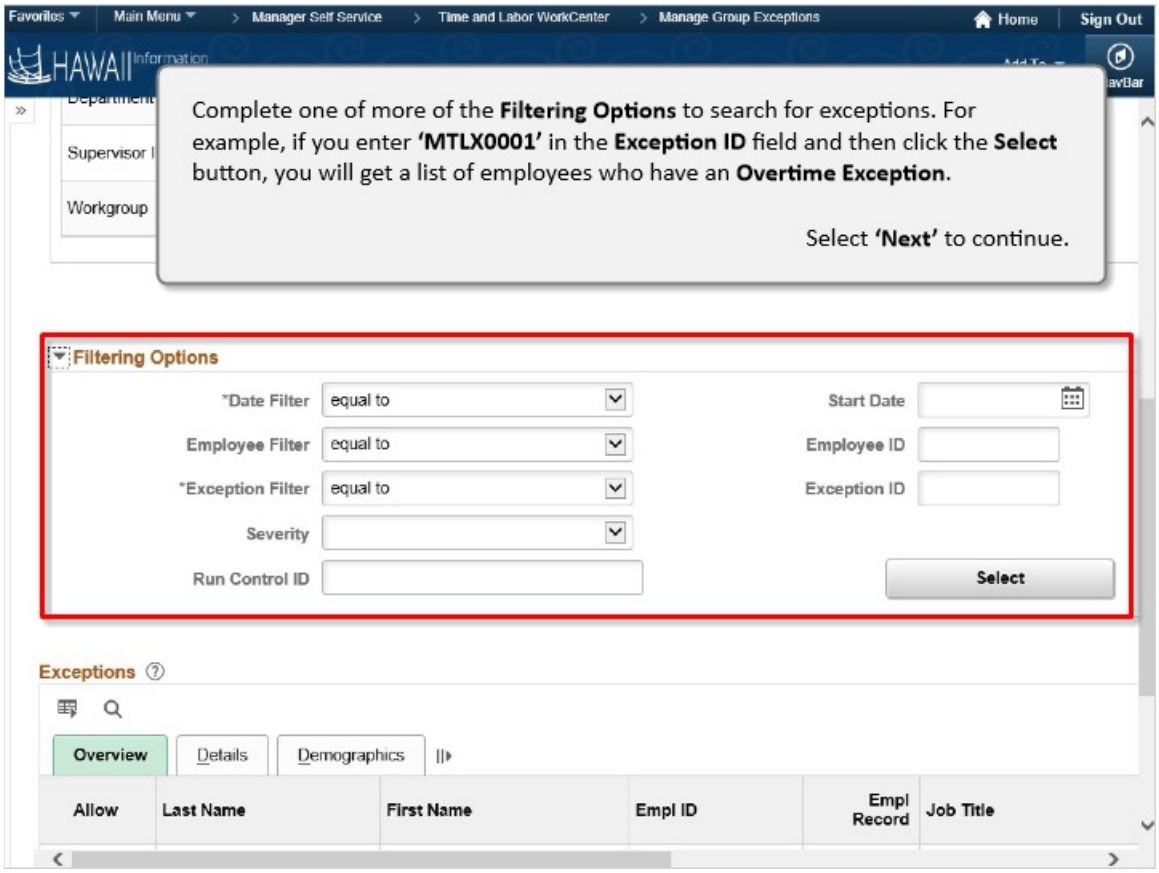


Click below the scroll bar to move down the page.

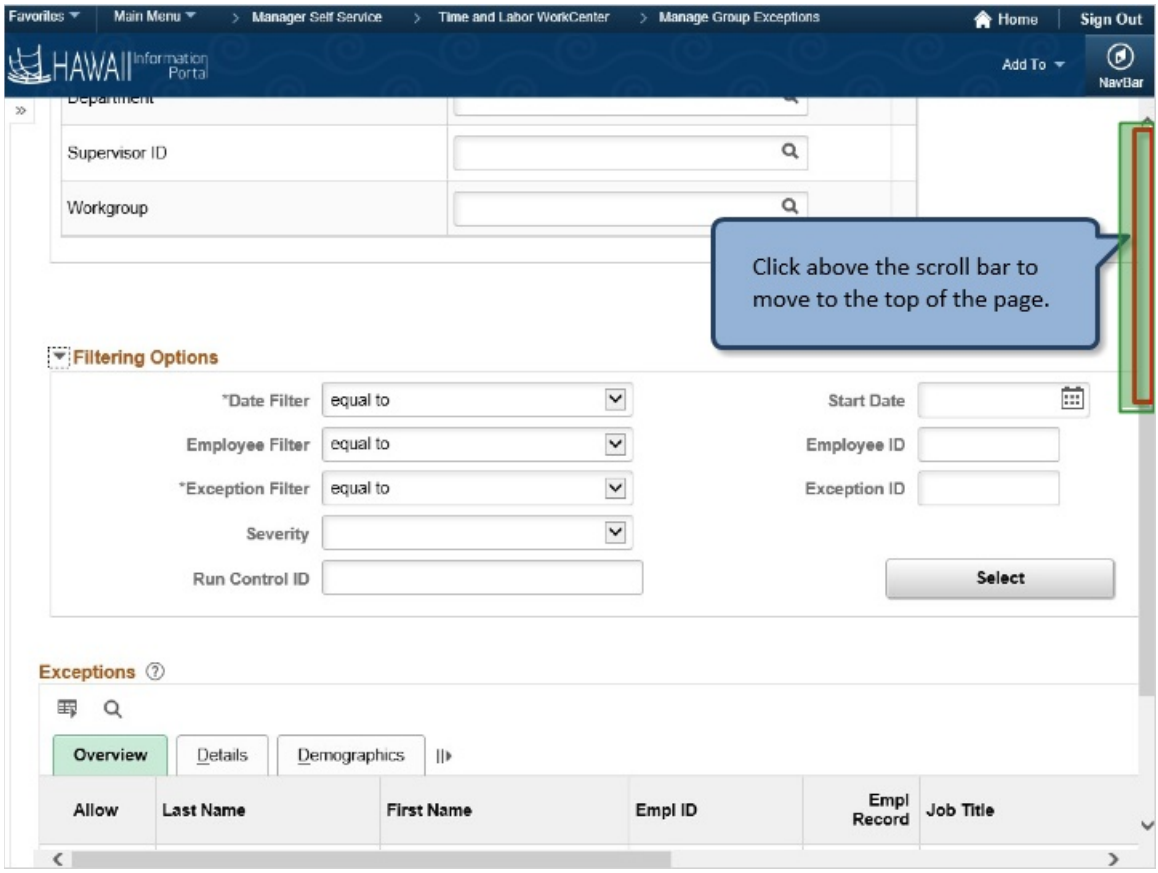


A second way to search for exceptions is using Filtering Options.

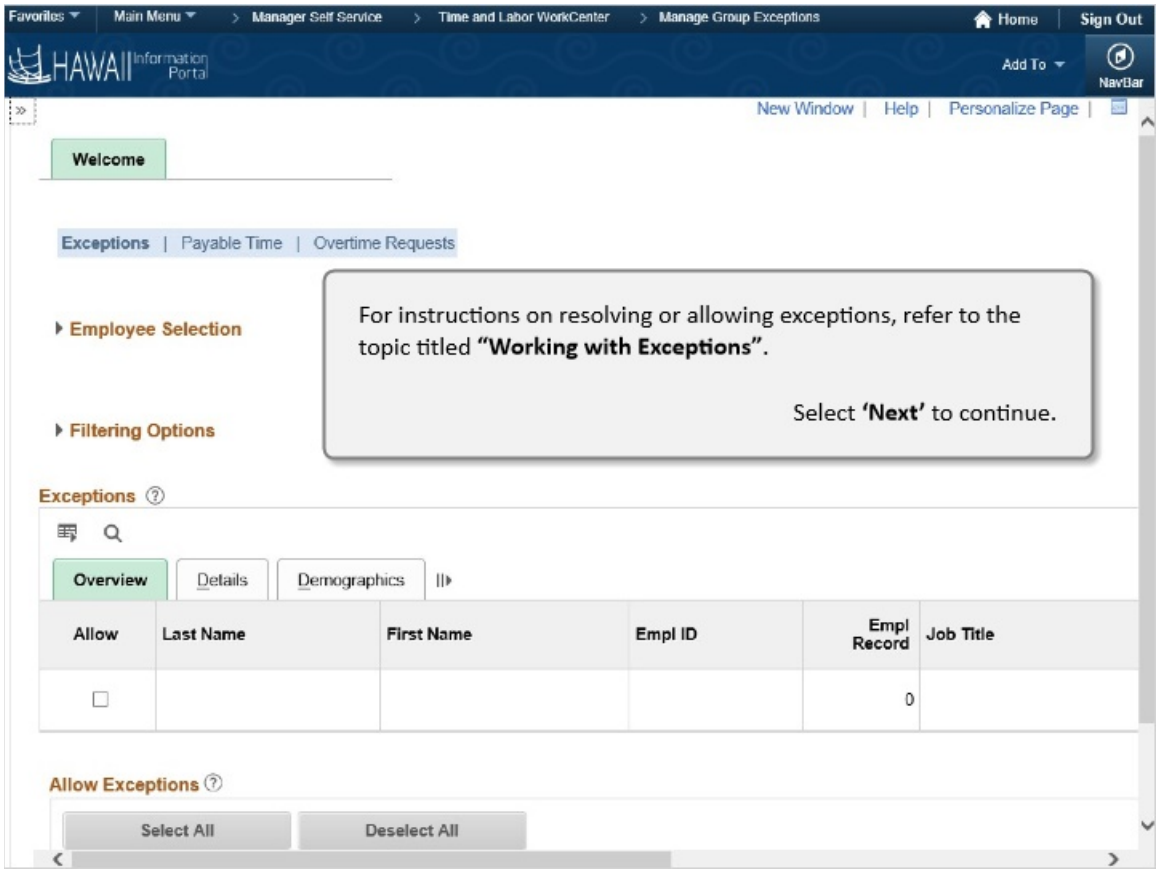
Click the arrow to the left of **Filtering Options**.



Complete one of more of the Filtering Options to search for exceptions. For example, if you enter 'MTLX0001' in the Exception ID field and then click the Select button, you will get a list of employees who have an Overtime Exception.



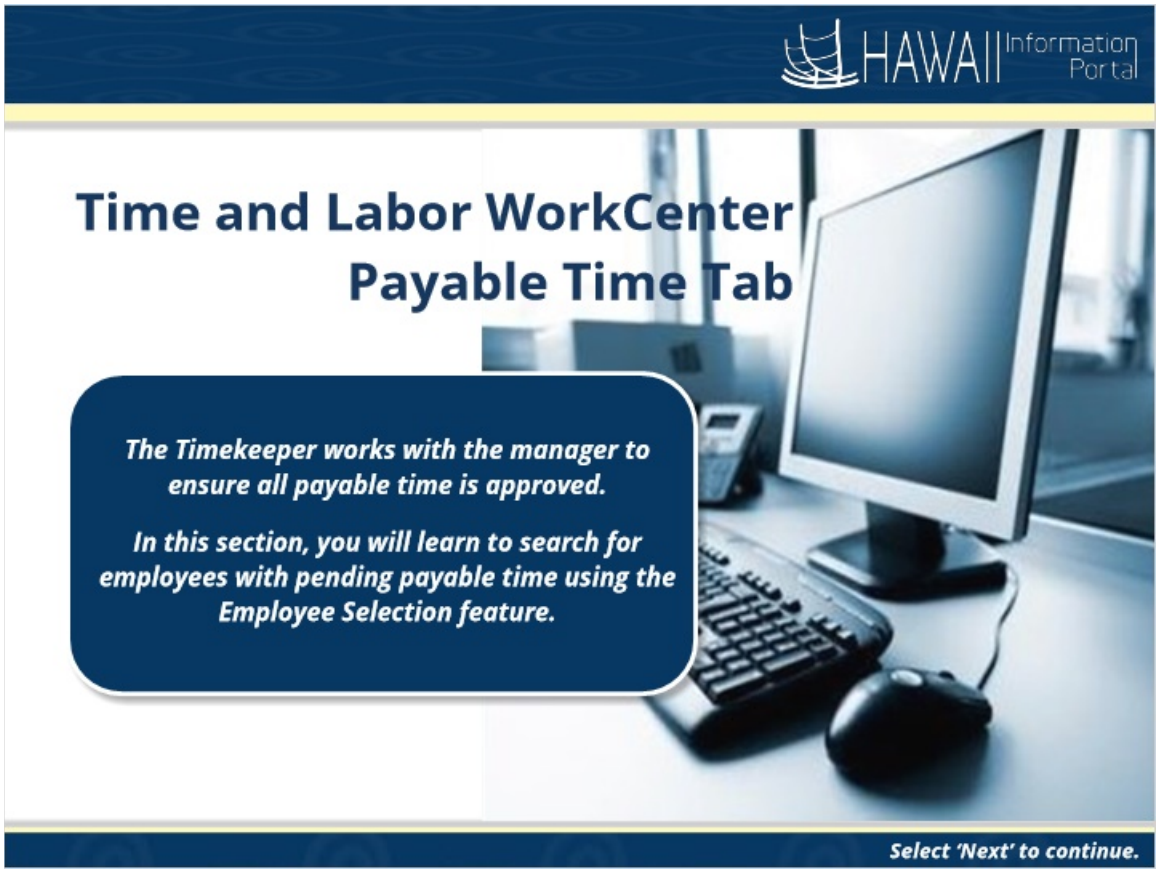
Click above the scroll bar to move to the top of the page.



For instructions on resolving or allowing exceptions, refer to the topic titled "Working with Exceptions".

Congratulations!

You've successfully completed this lesson.

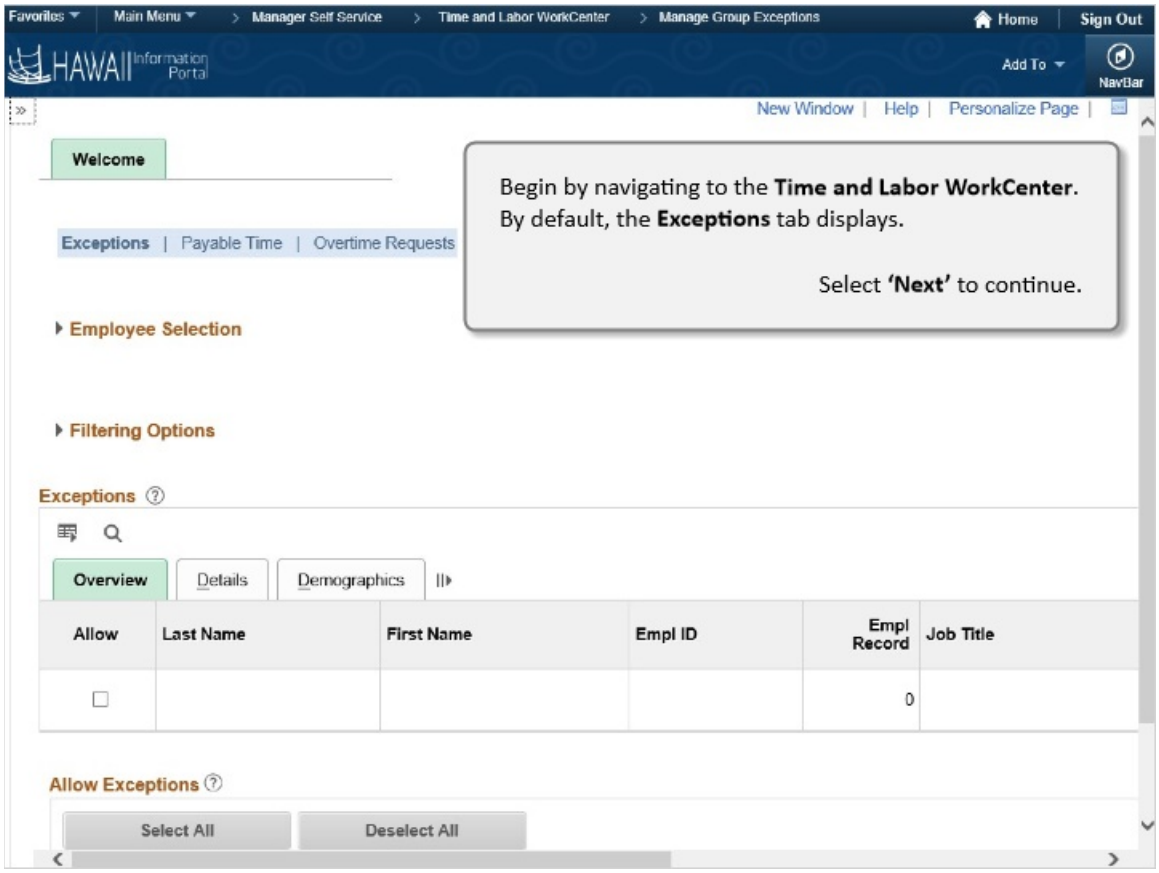


The Payable Time Tab

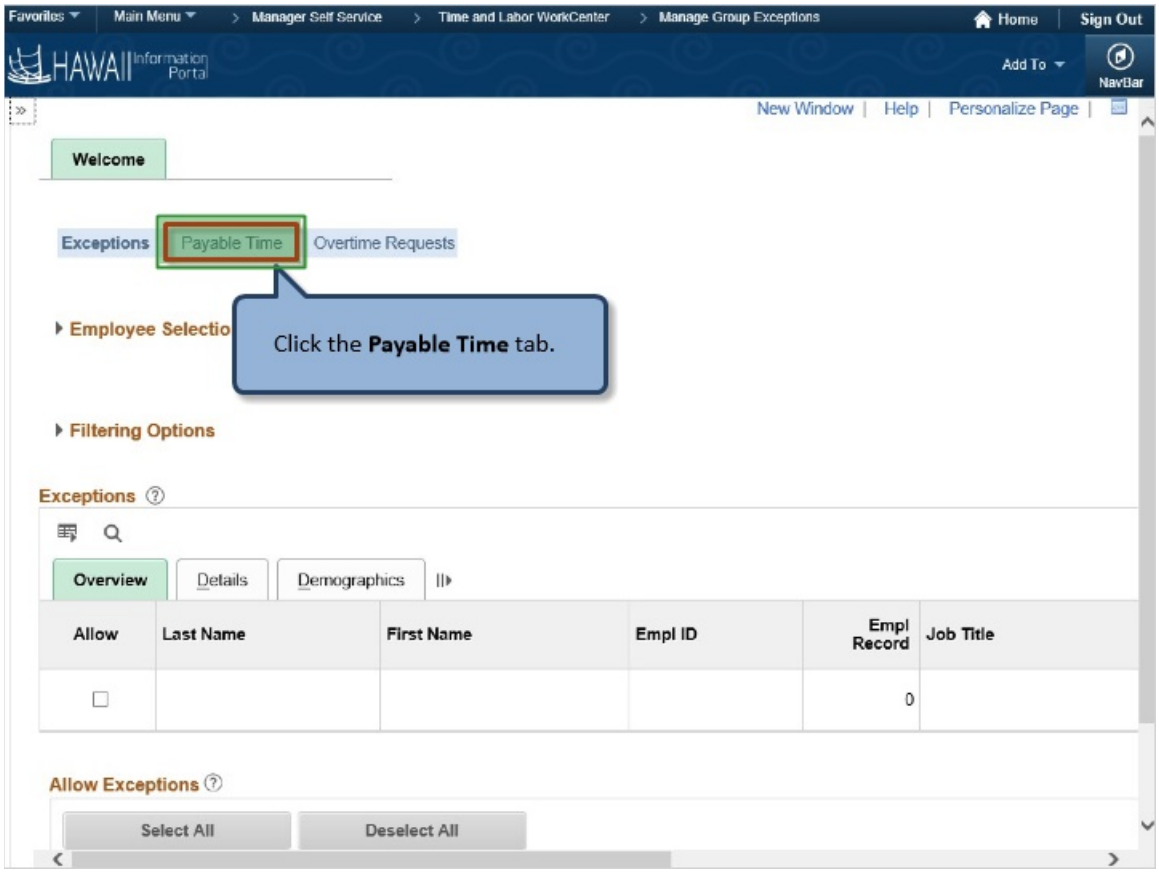
Time and Labor WorkCenter Payable Time Tab

The Timekeeper works with the manager to ensure all payable time is approved.

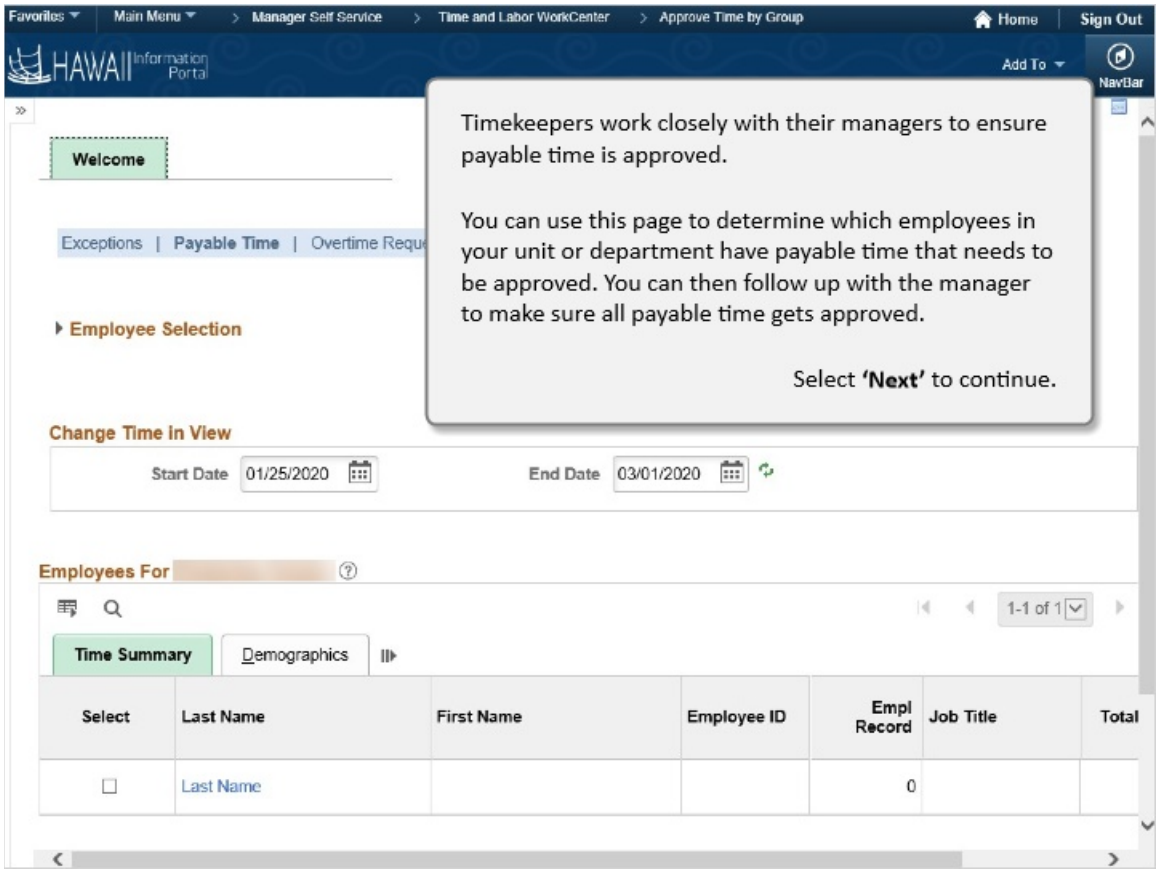
In this section, you will learn to search for employees with pending payable time using the Employee Selection feature.



Begin by navigating to the Time and Labor WorkCenter. By default, the Exceptions tab displays.

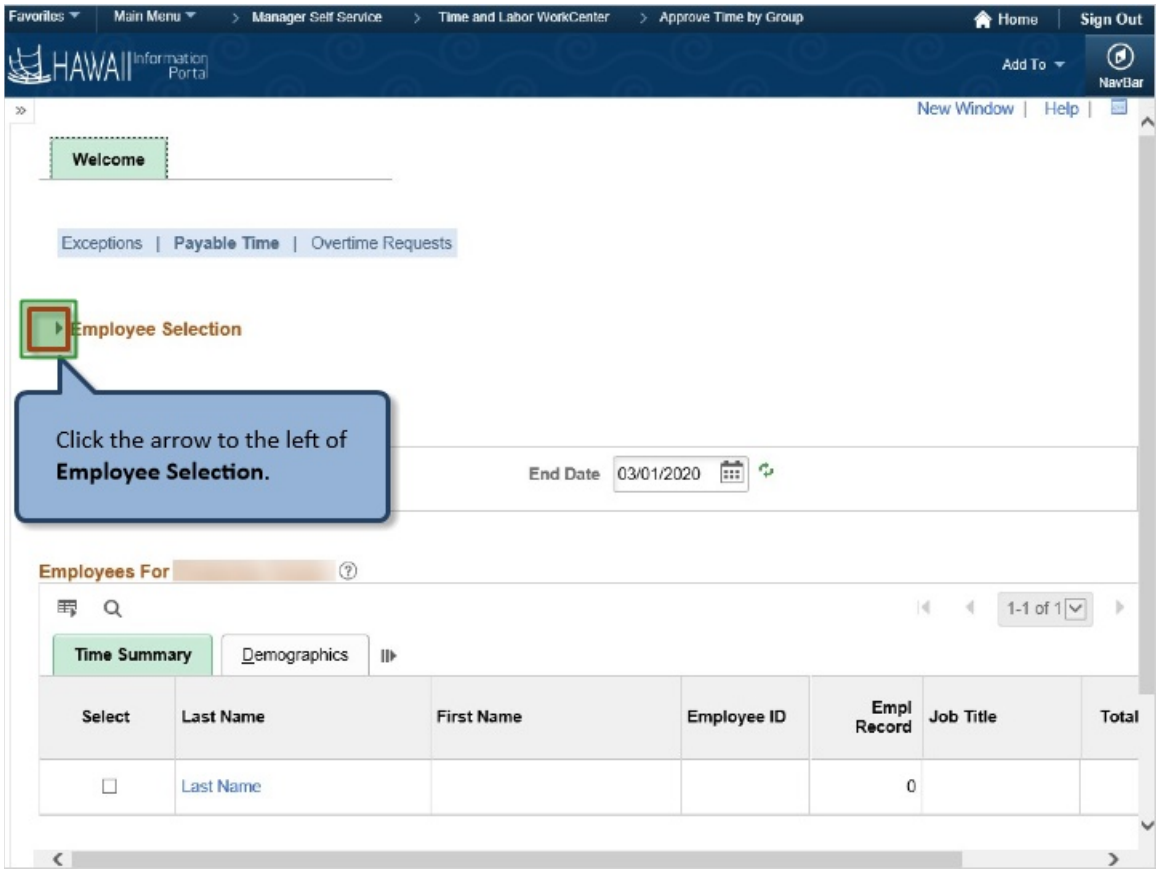


Click the Payable Time tab.

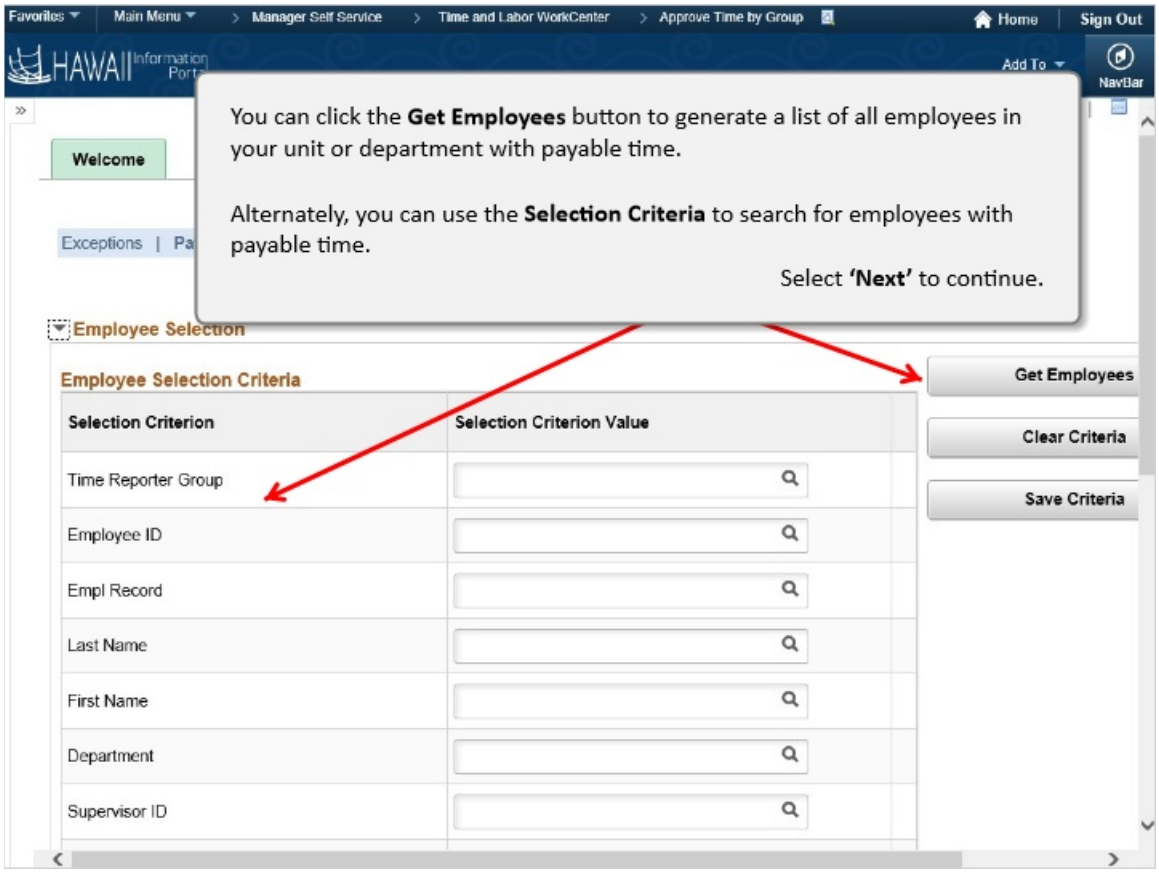


Timekeepers work closely with their managers to ensure payable time is approved.

You can use this page to determine which employees in your unit or department have payable time that needs to be approved. You can then follow up with the manager to make sure all payable time gets approved.

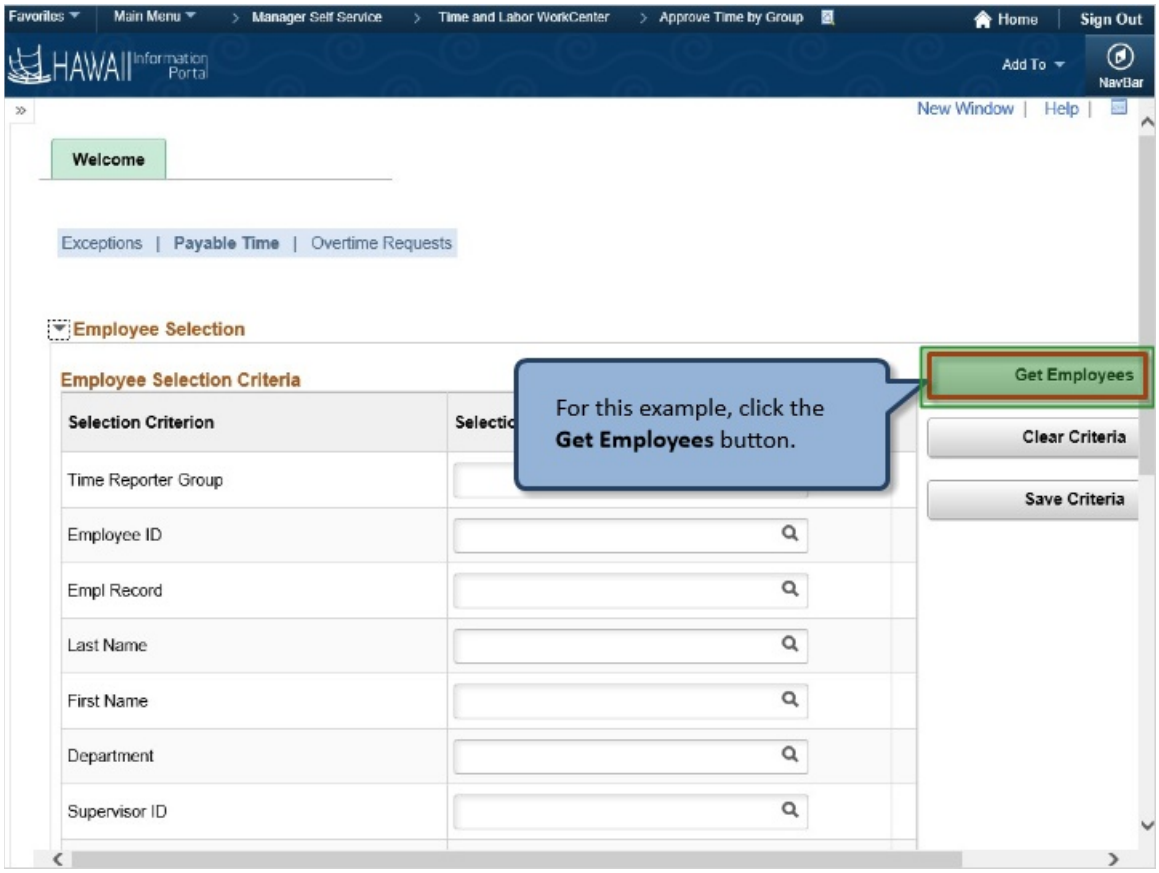


Click the arrow to the left of **Employee Selection**.

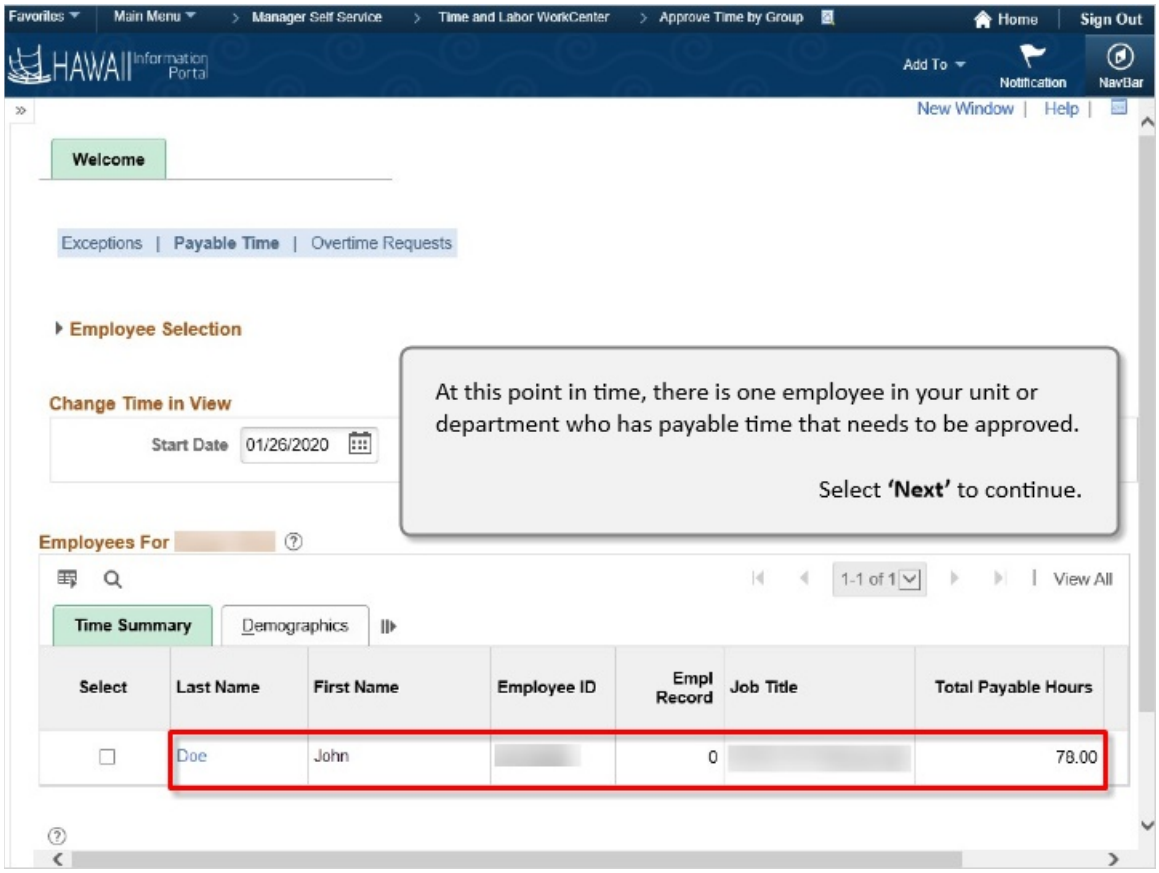


You can click the **Get Employees** button to generate a list of all employees in your unit or department with payable time.

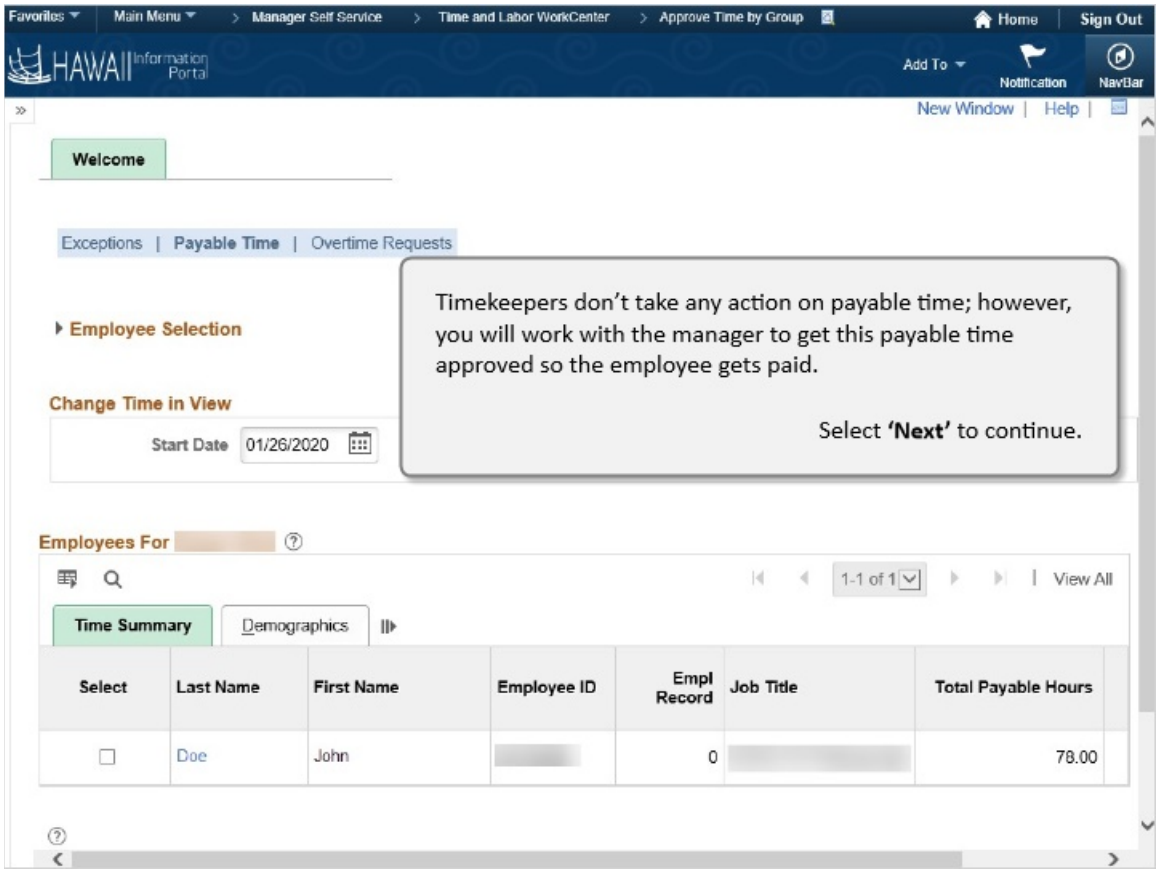
Alternately, you can use the **Selection Criteria** to search for employees with payable time.



For this example, click the **Get Employees** button.



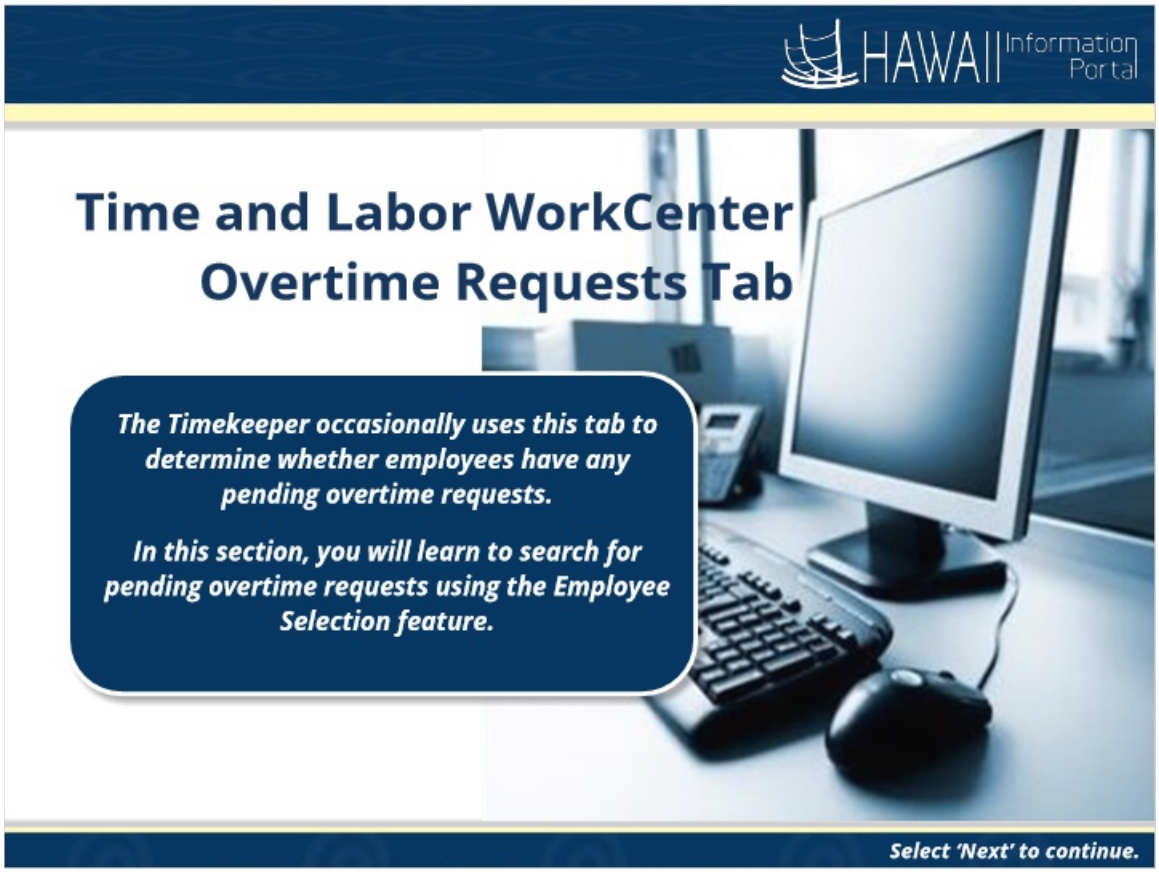
At this point in time, there is one employee in your unit or department who has payable time that needs to be approved.



Timekeepers don't take any action on payable time; however, you will work with the manager to get this payable time approved so the employee gets paid.

Congratulations!

You've successfully completed this lesson.

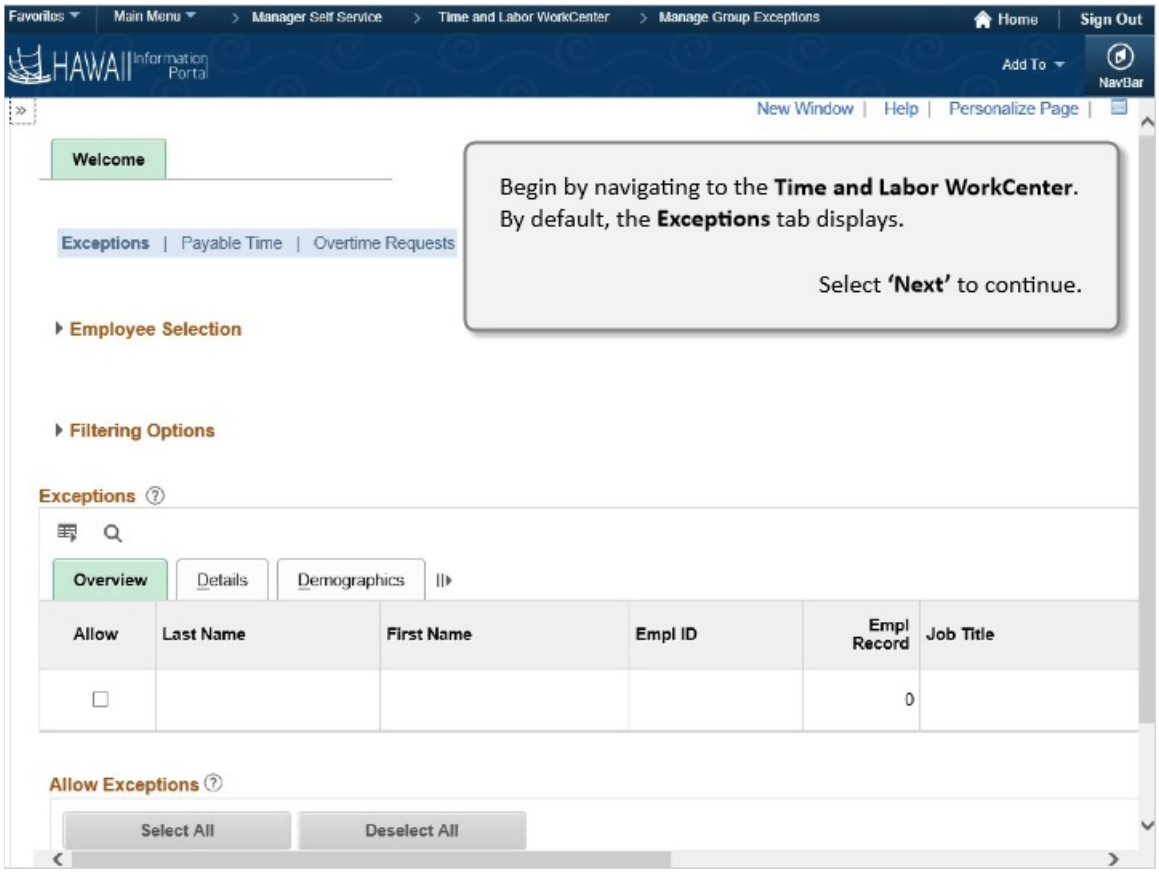


The Overtime Requests Tab

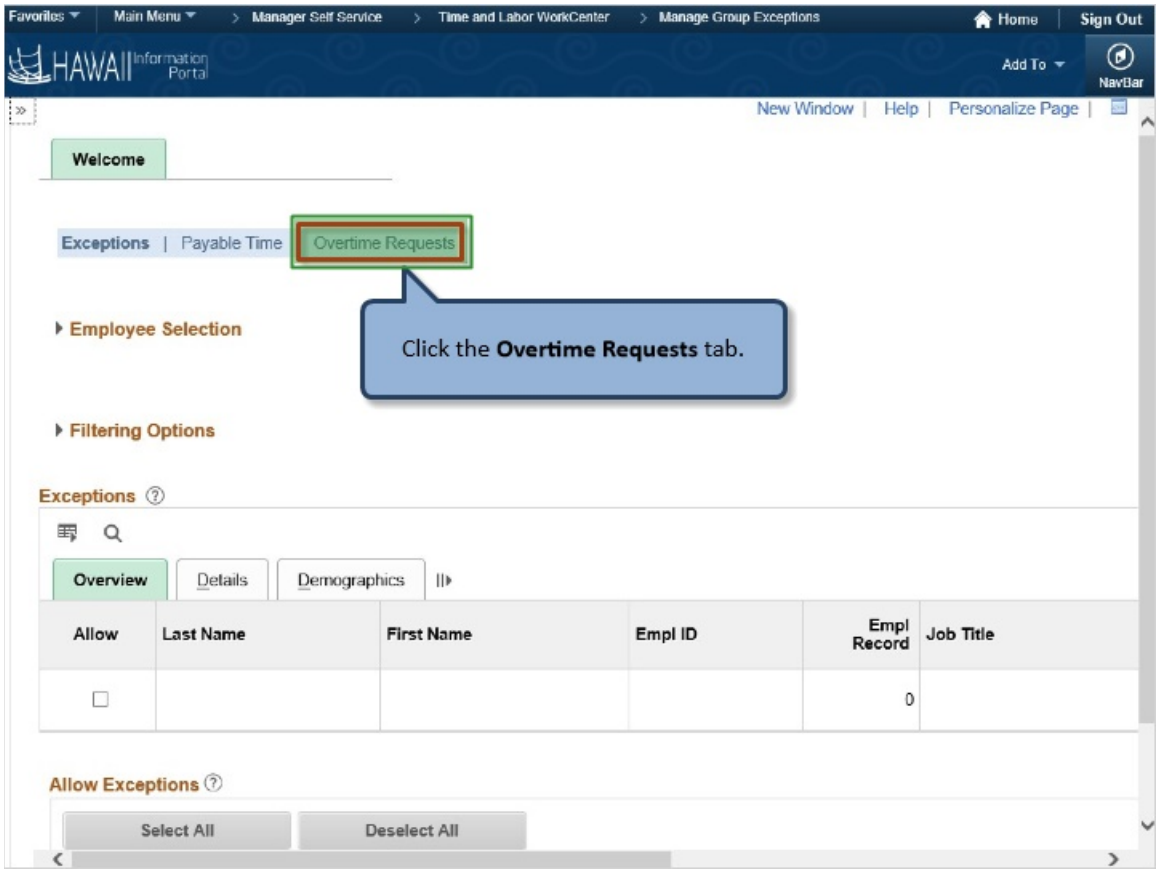
Time and Labor WorkCenter Overtime Requests Tab

The Timekeeper occasionally uses this tab to determine whether employees have any pending overtime requests.

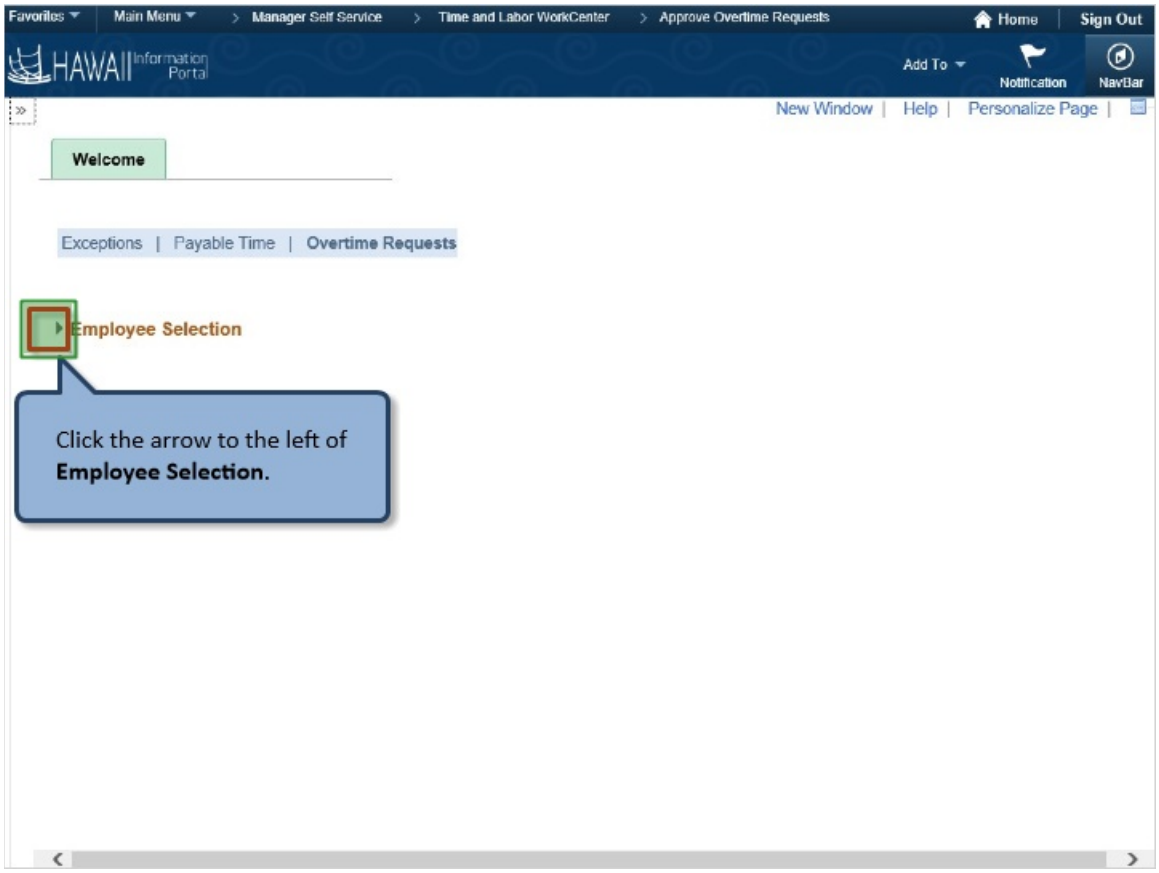
In this section, you will learn to search for pending overtime requests using the Employee Selection feature.



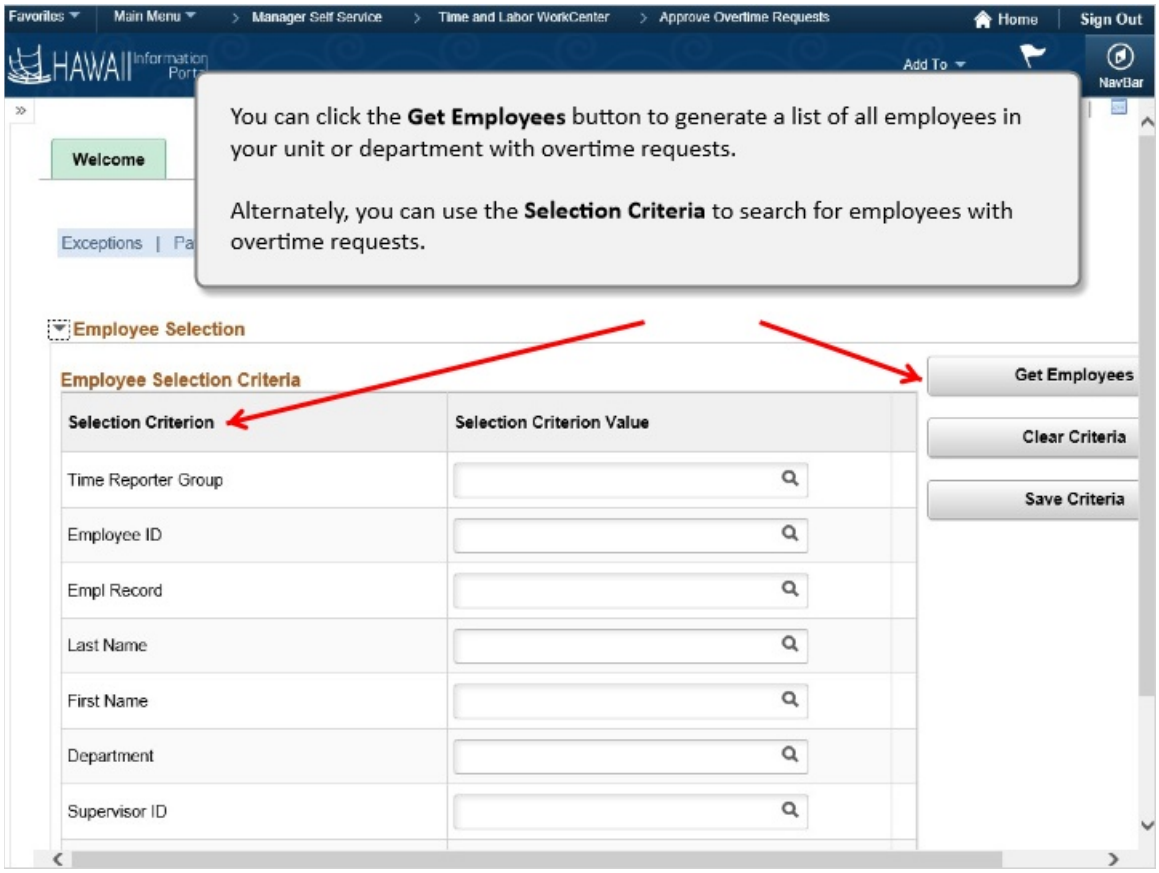
Begin by navigating to the **Time and Labor WorkCenter**. By default, the **Exceptions** tab displays.



Click the **Overtime Requests** tab.

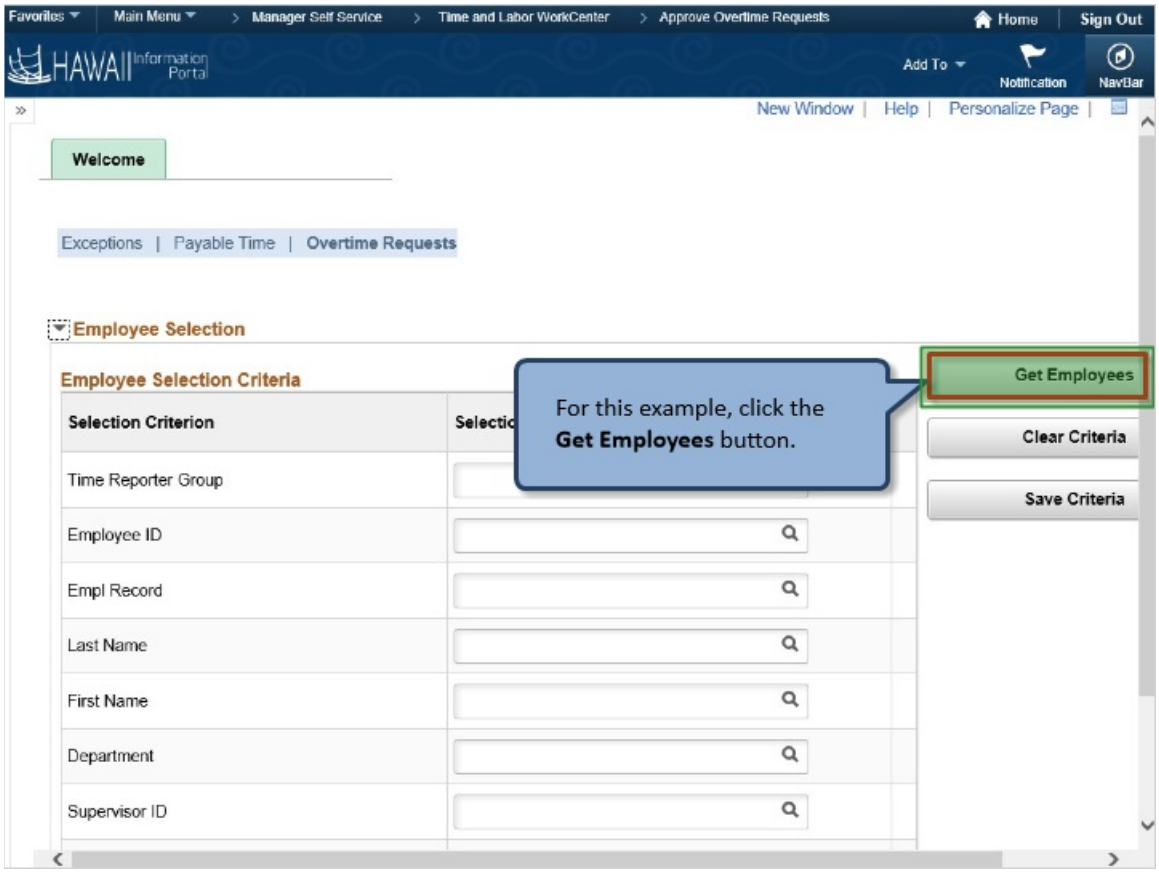


Click the arrow to the left of **Employee Selection**.

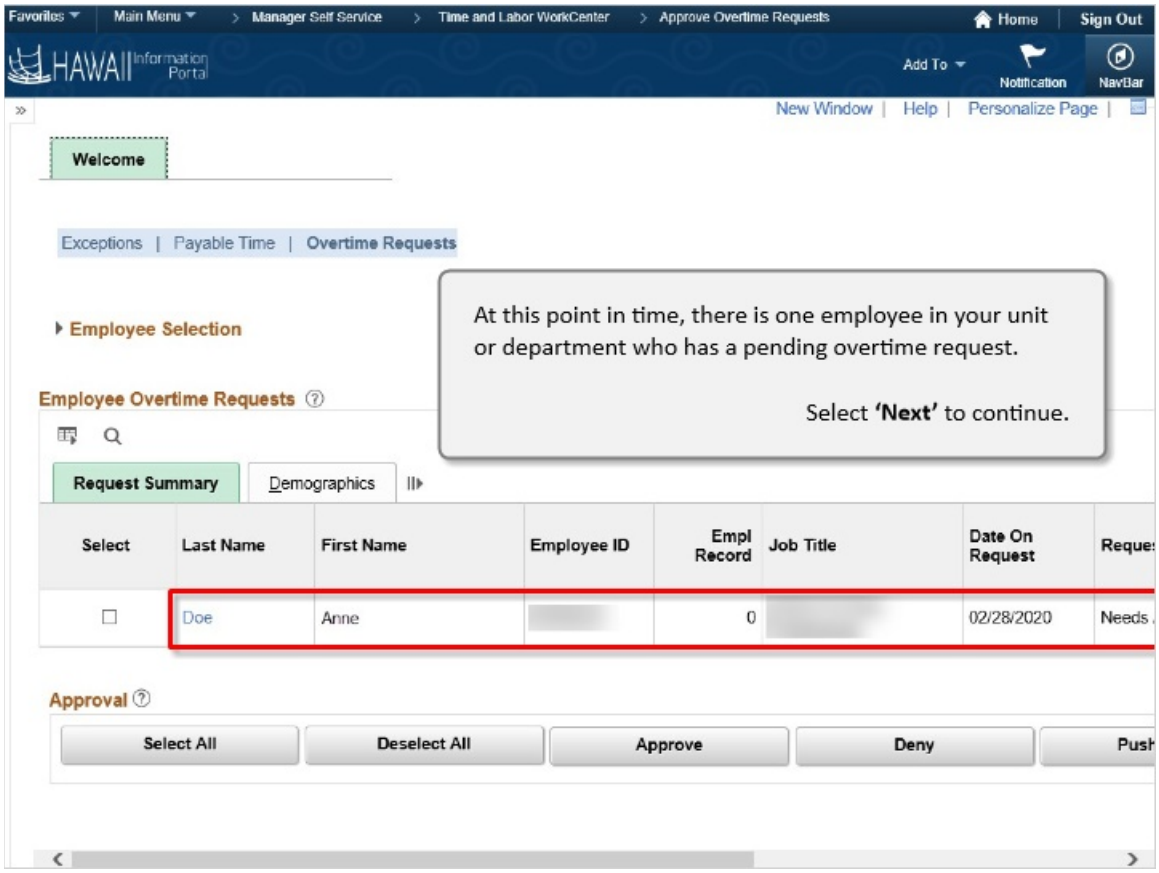


You can click the **Get Employees** button to generate a list of all employees in your unit or department with overtime requests.

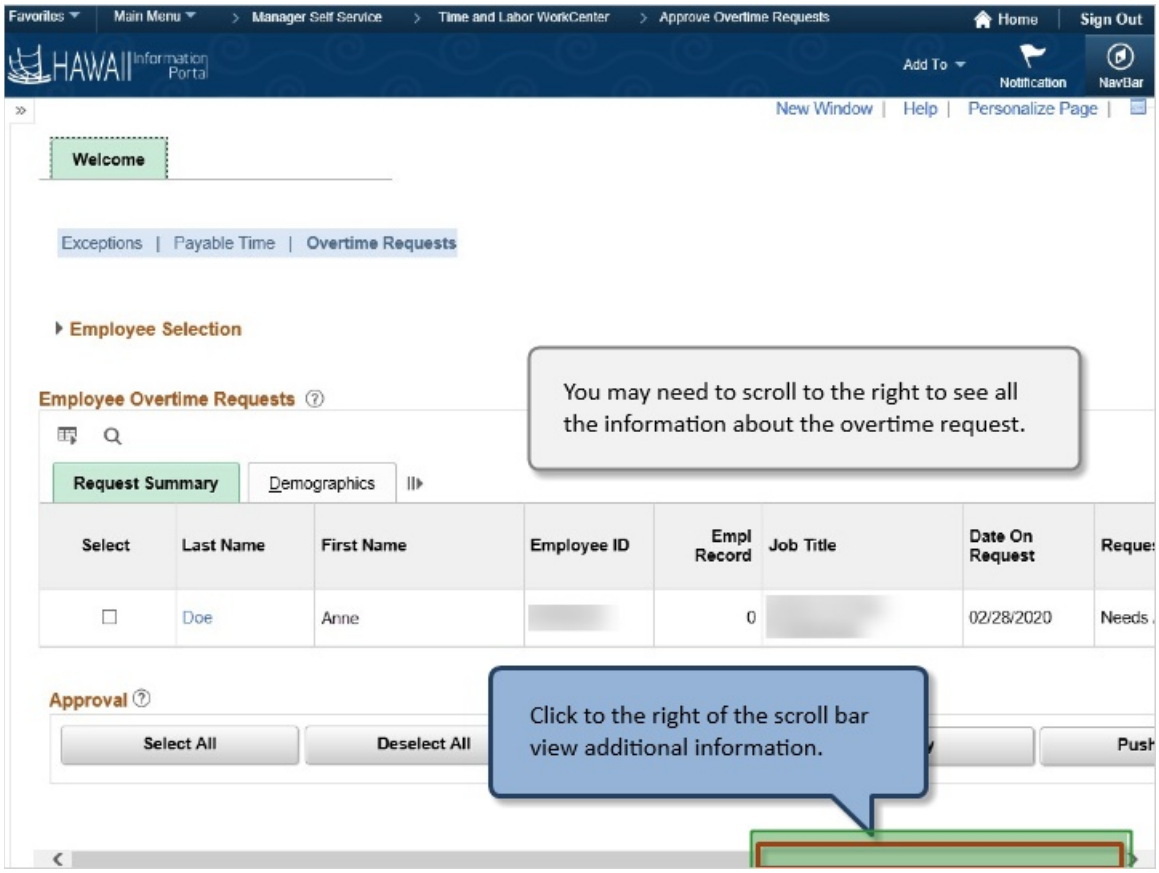
Alternately, you can use the **Selection Criteria** to search for employees with overtime requests.



For this example, click the **Get Employees** button.

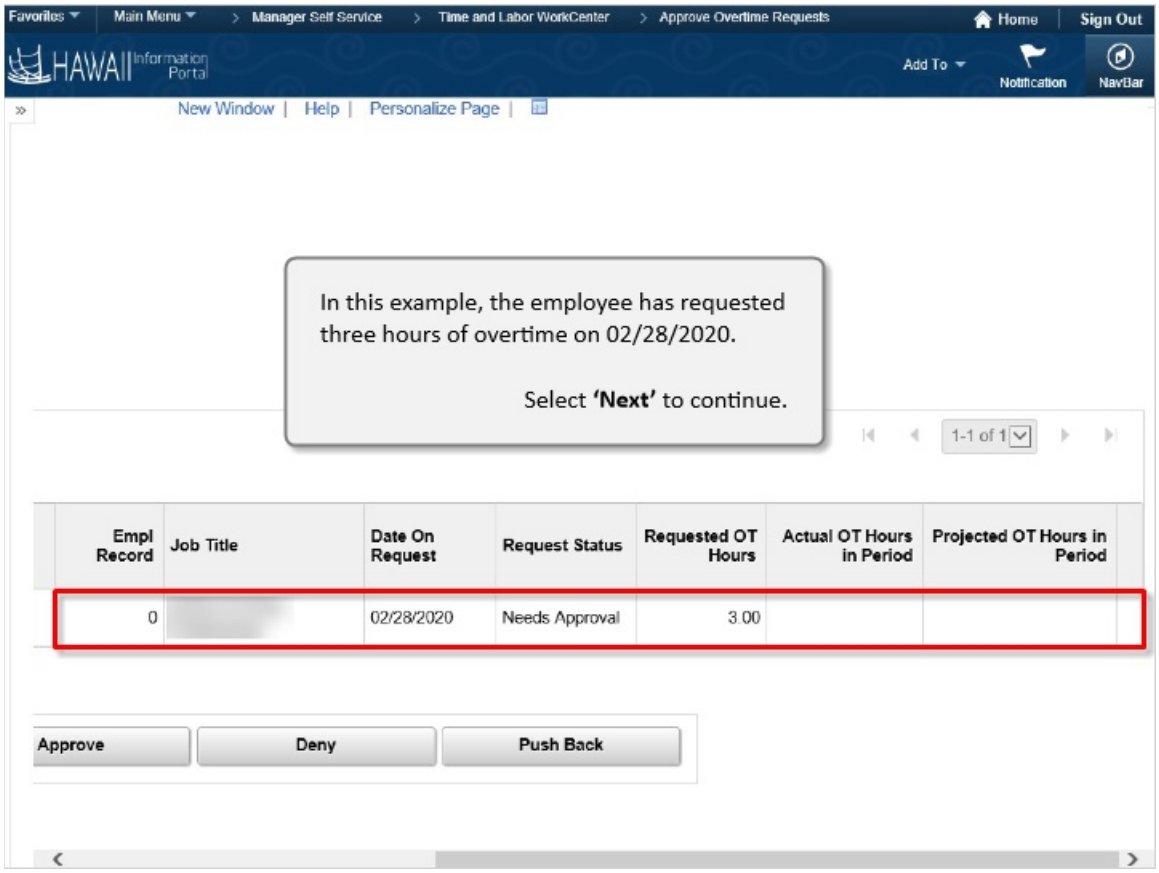


At this point in time, there is one employee in your unit or department who has a pending overtime request.

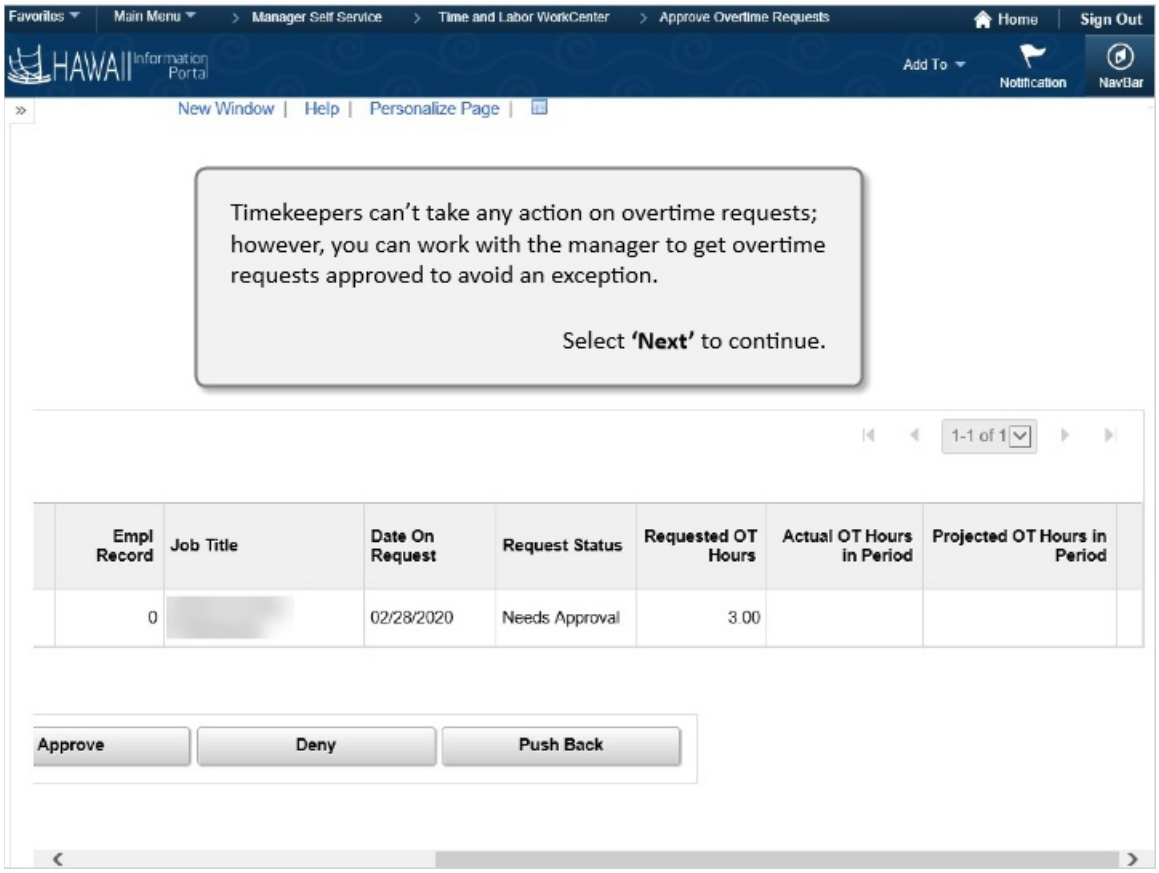


You may need to scroll to the right to see all the information about the overtime request.

Click to the right of the scroll bar view additional information.



In this example, the employee has requested three hours of overtime on 02/28/2020.



Timekeepers can't take any action on overtime requests; however, you can work with the manager to get overtime requests approved to avoid an exception.

Congratulations!

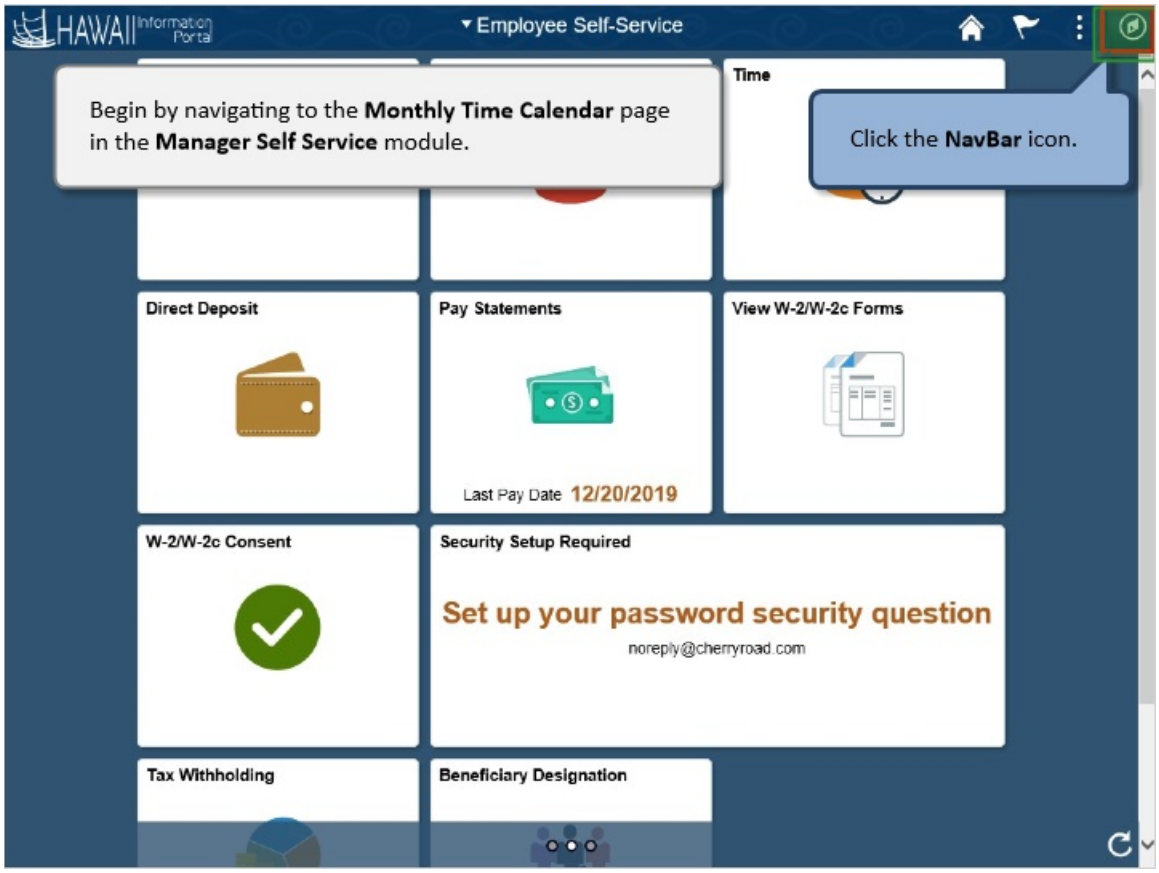
You've successfully completed this lesson.

Monthly Calendar

Lesson Scenario

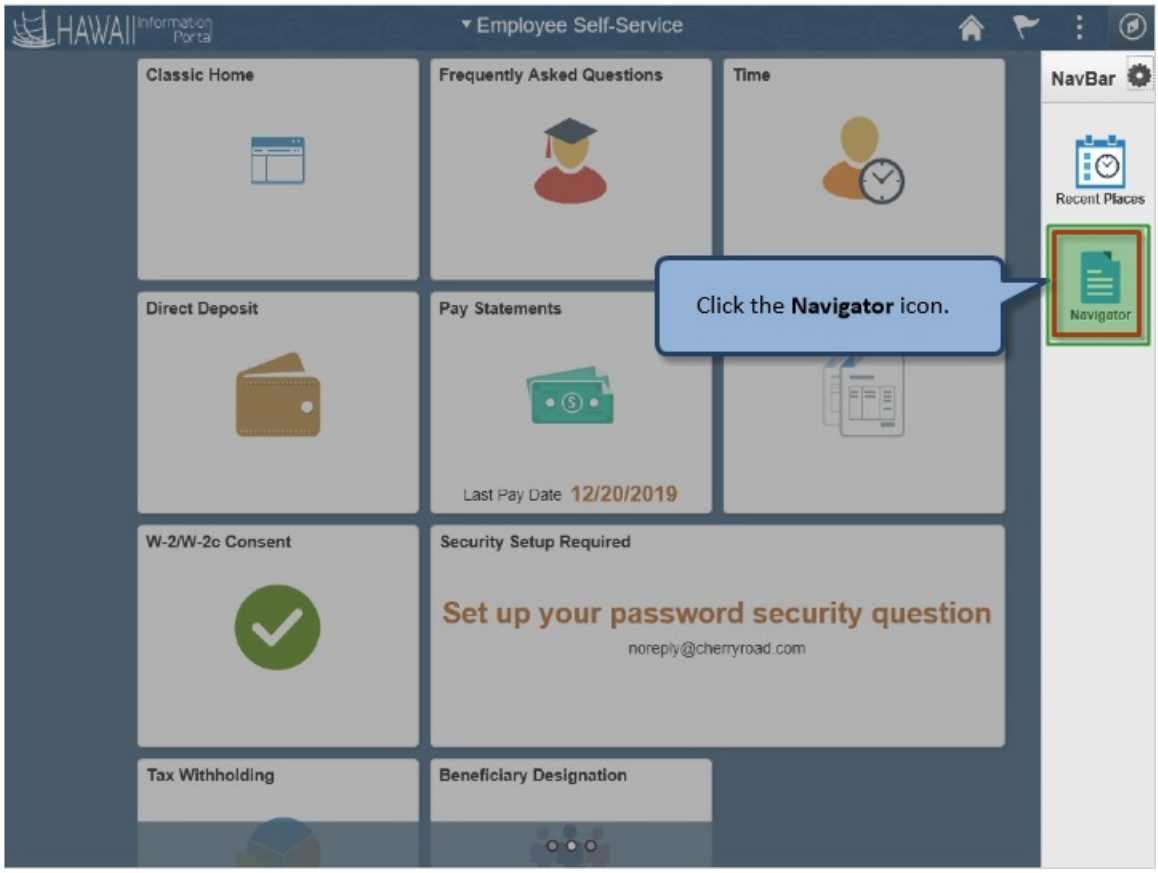
In this lesson, you will learn to use the Monthly Time Calendar.

You are a manager with two direct reports. You want to view their payable time for the current month (February 2020) and you also want to see if either of them has any leave or overtime planned for the first week of March 2020.

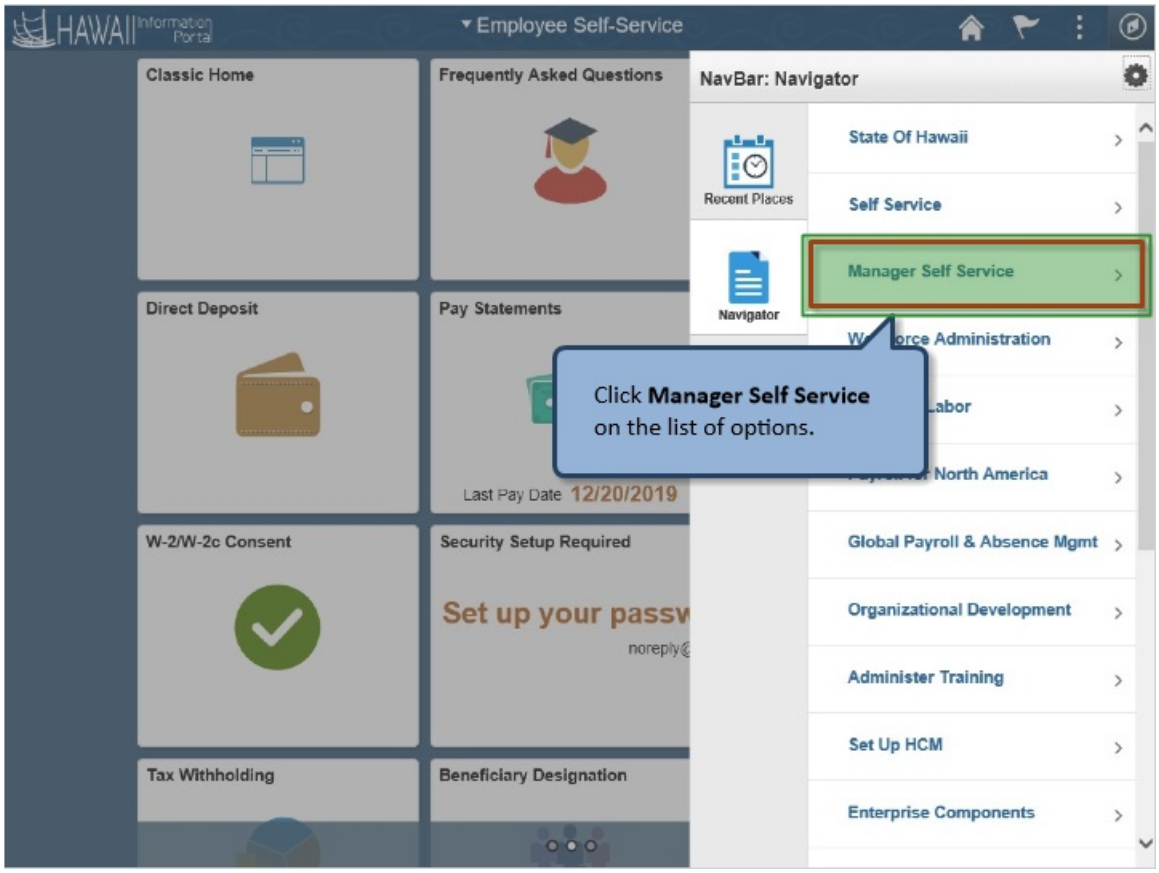


Begin by navigating to the **Monthly Time Calendar** page in the **Manager Self Service** module.

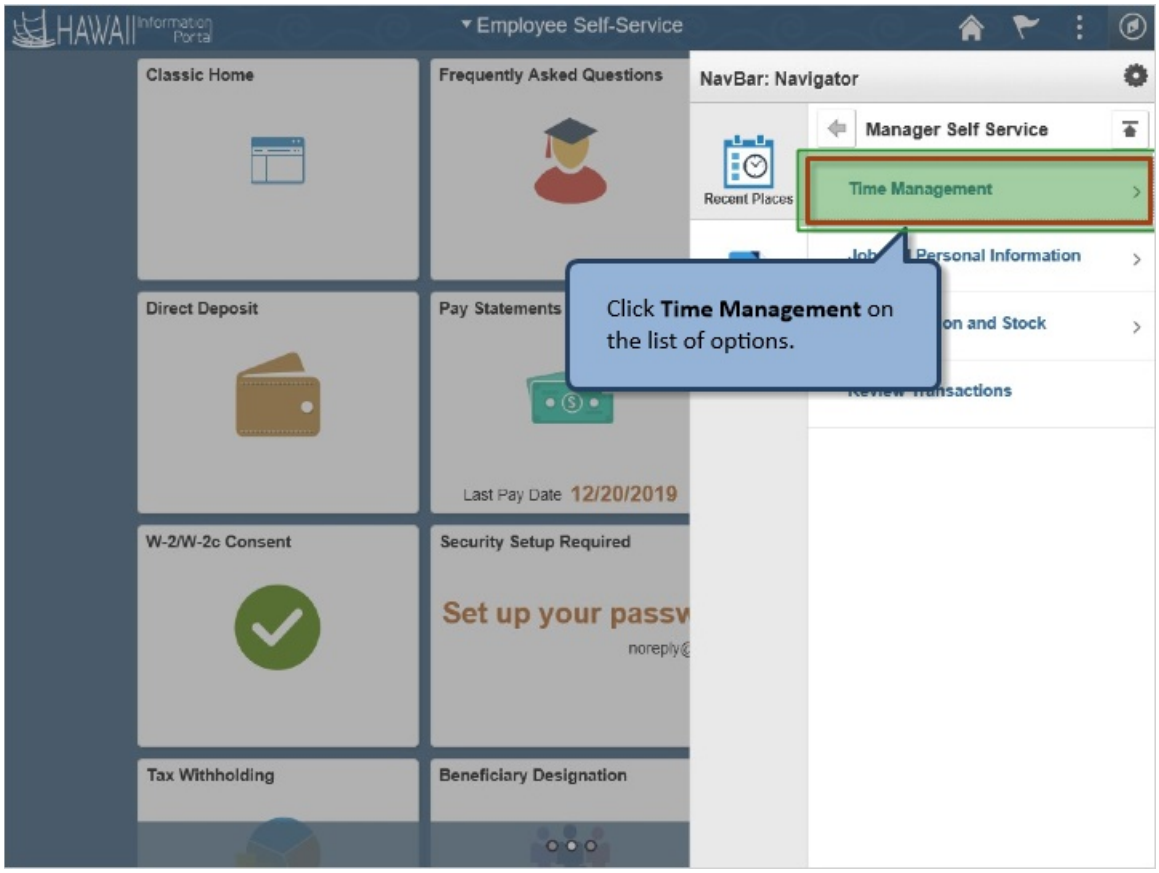
Click the **NavBar** icon.



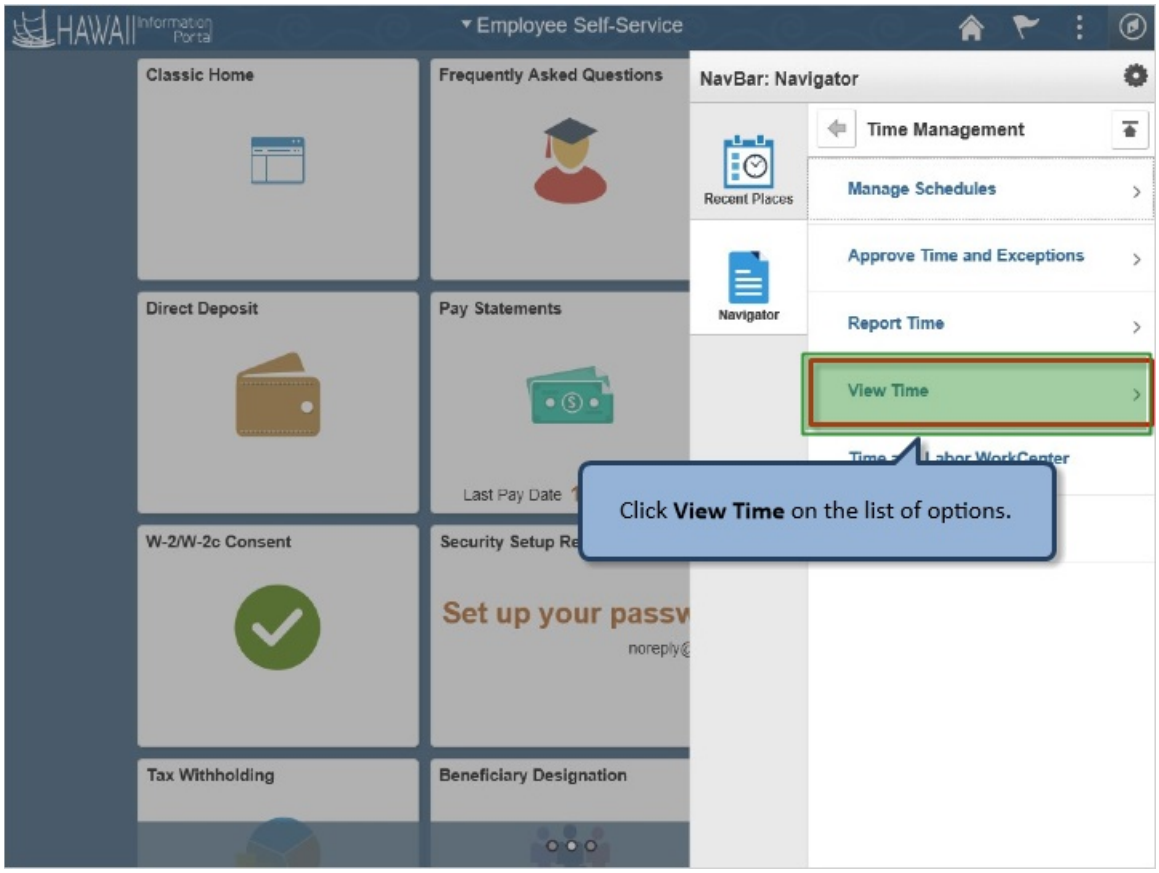
Click the **Navigator** icon.



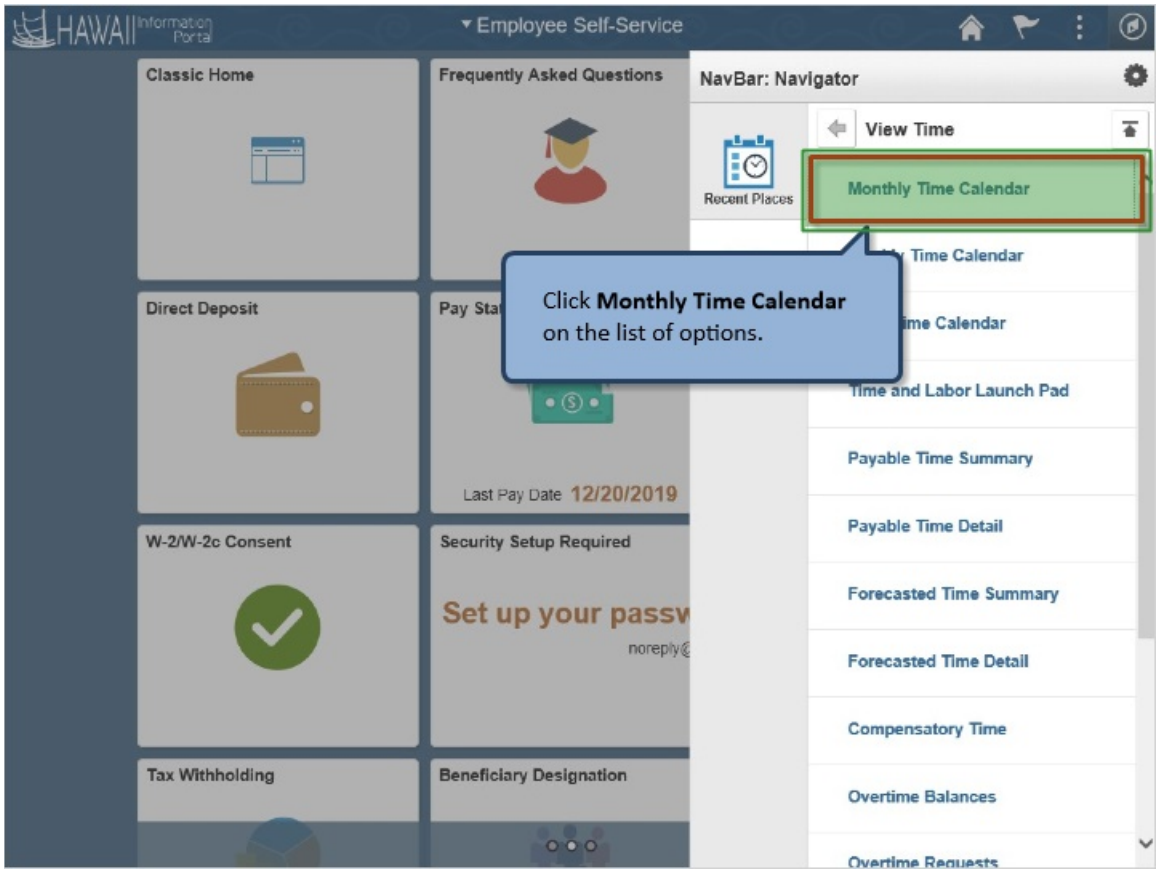
Click **Manager Self Service** on the list of options.



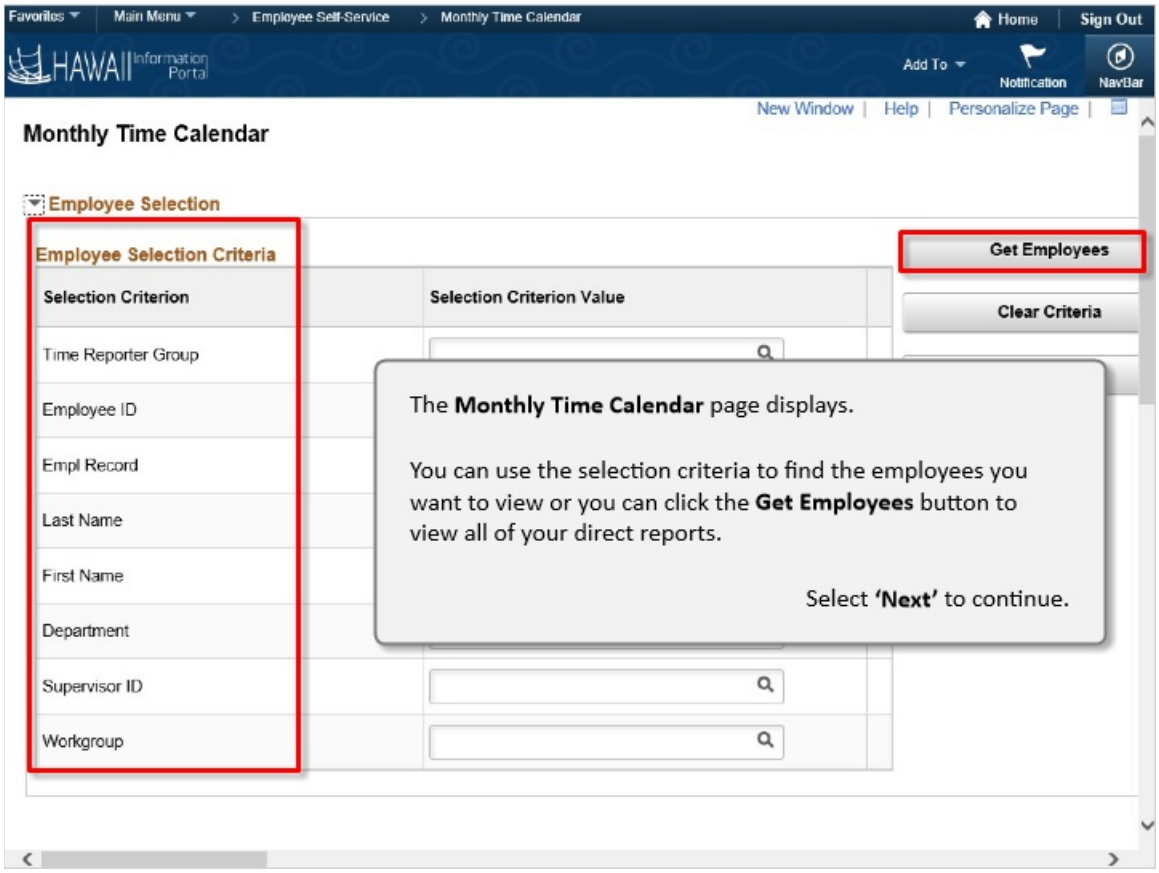
Click **Time Management** on the list of options.



Click **View Time** on the list of options.

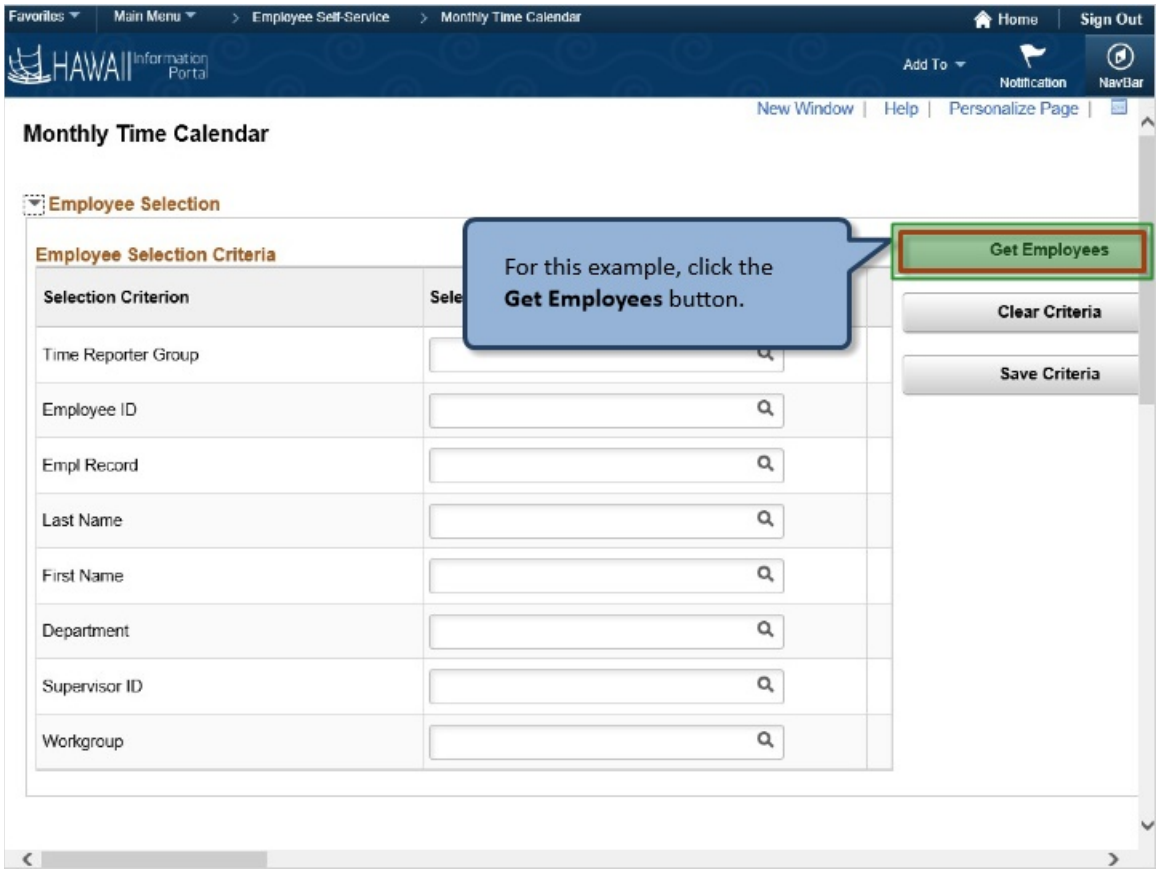


Click **Monthly Time Calendar** on the list of options.

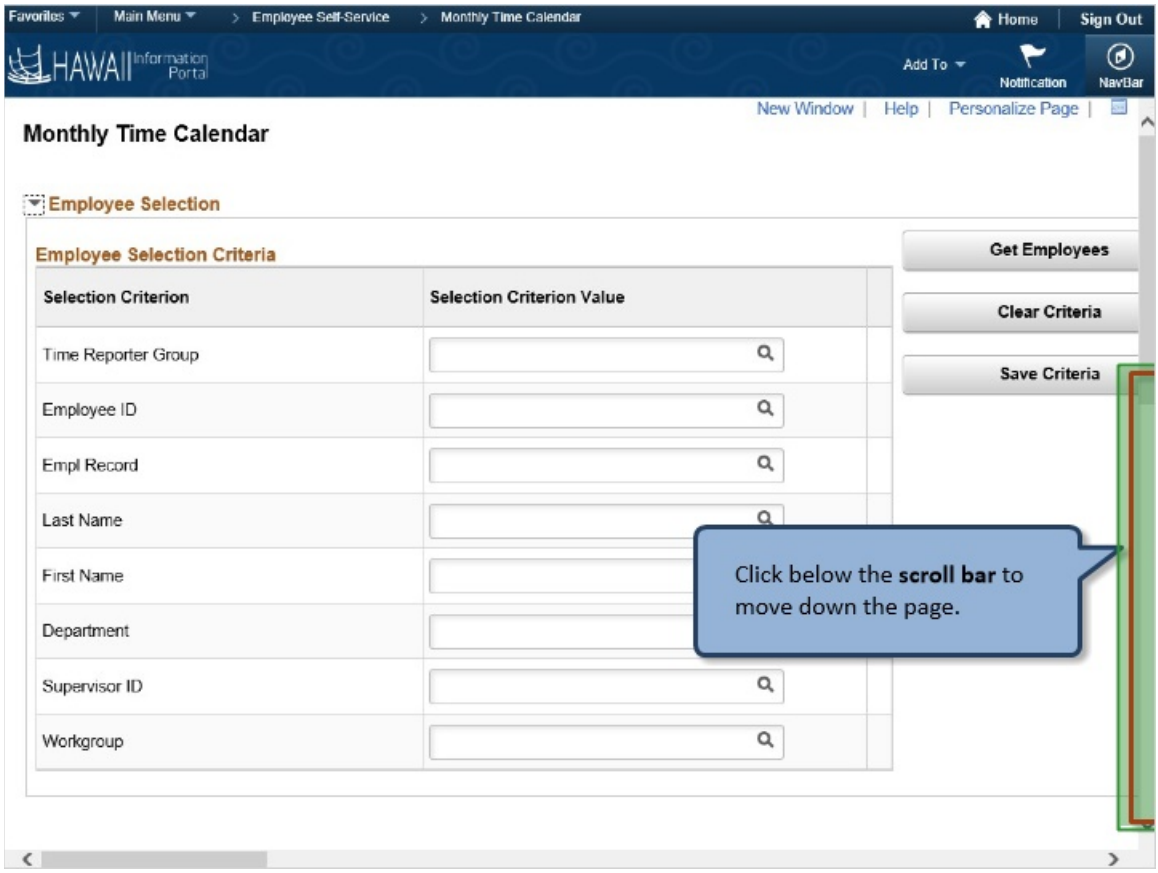


The **Monthly Time Calendar** page displays.

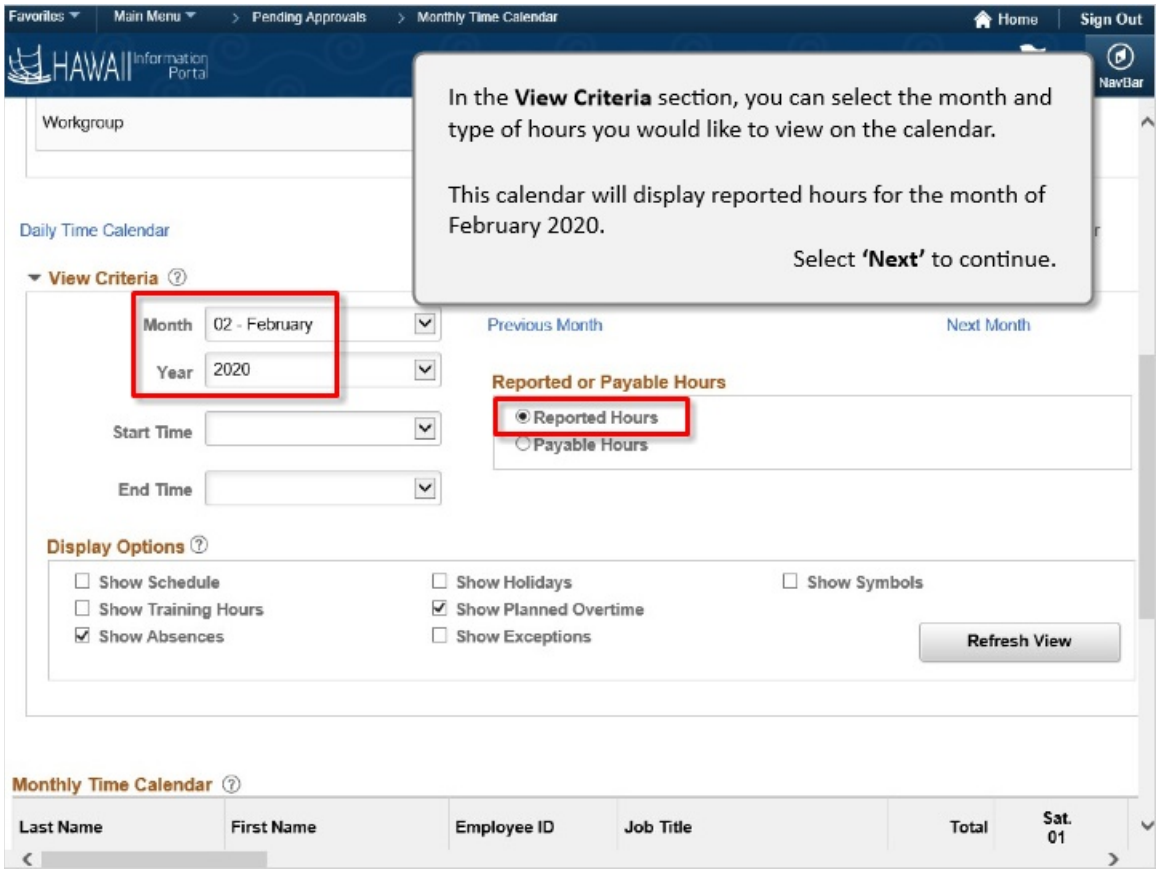
You can use the selection criteria to find the employees you want to view or you can click the **Get Employees** button to view all of your direct reports.



For this example, click the **Get Employees** button.

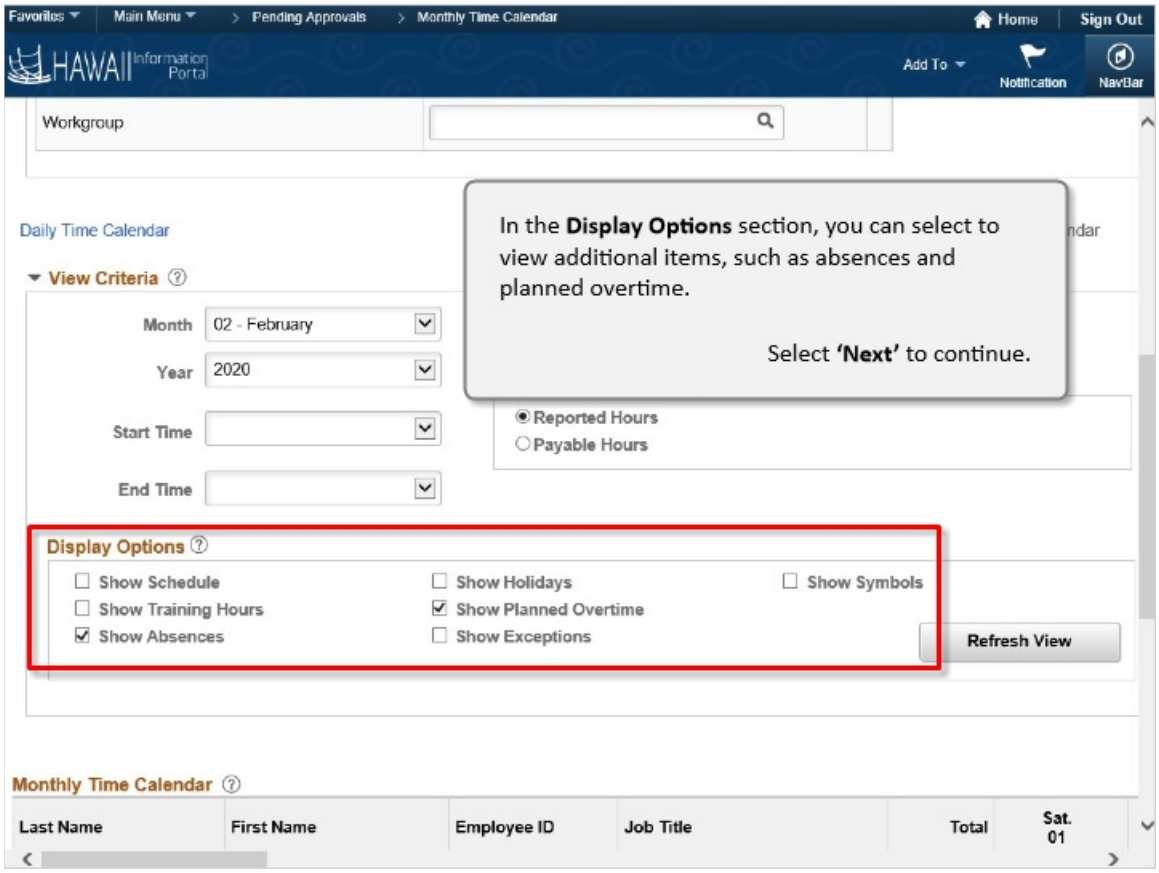


Click below the **scroll bar** to move down the page.

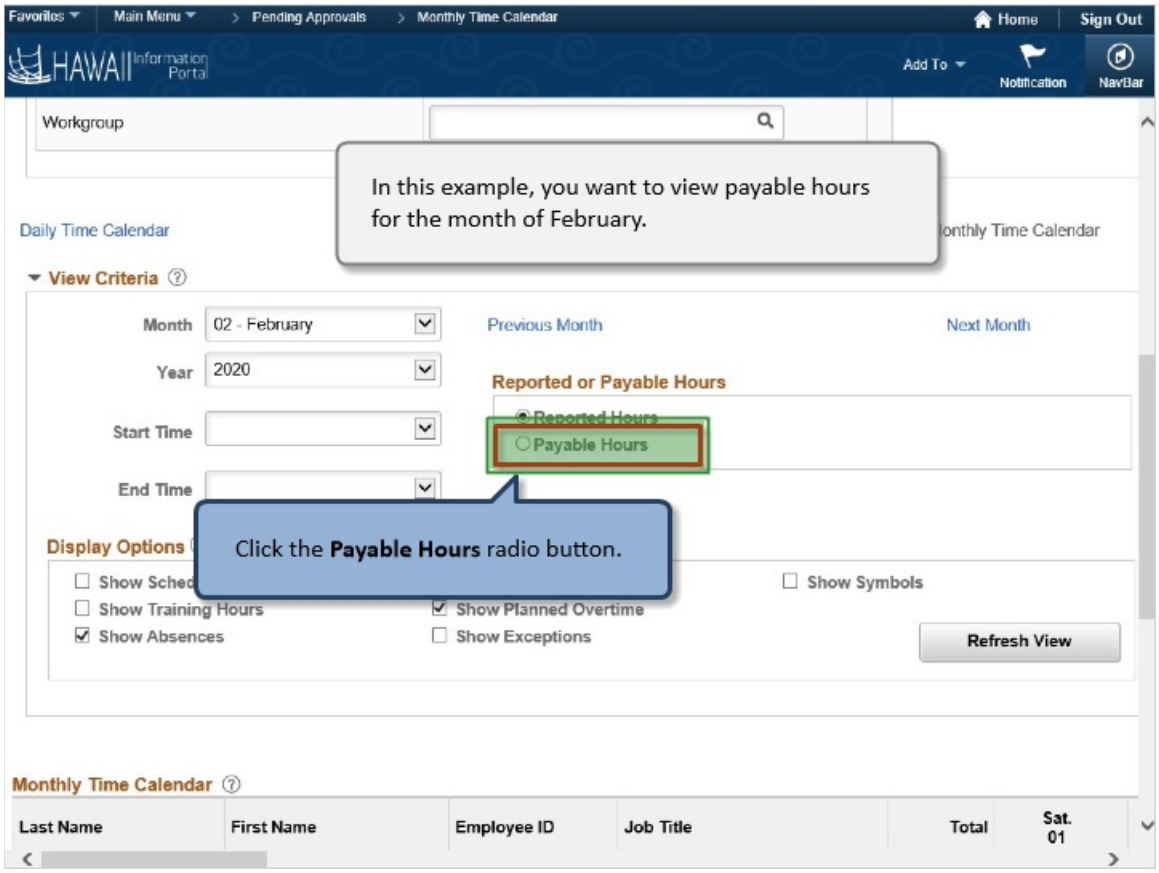


In the **View Criteria** section, you can select the month and type of hours you would like to view on the calendar.

This calendar will display reported hours for the month of February 2020.

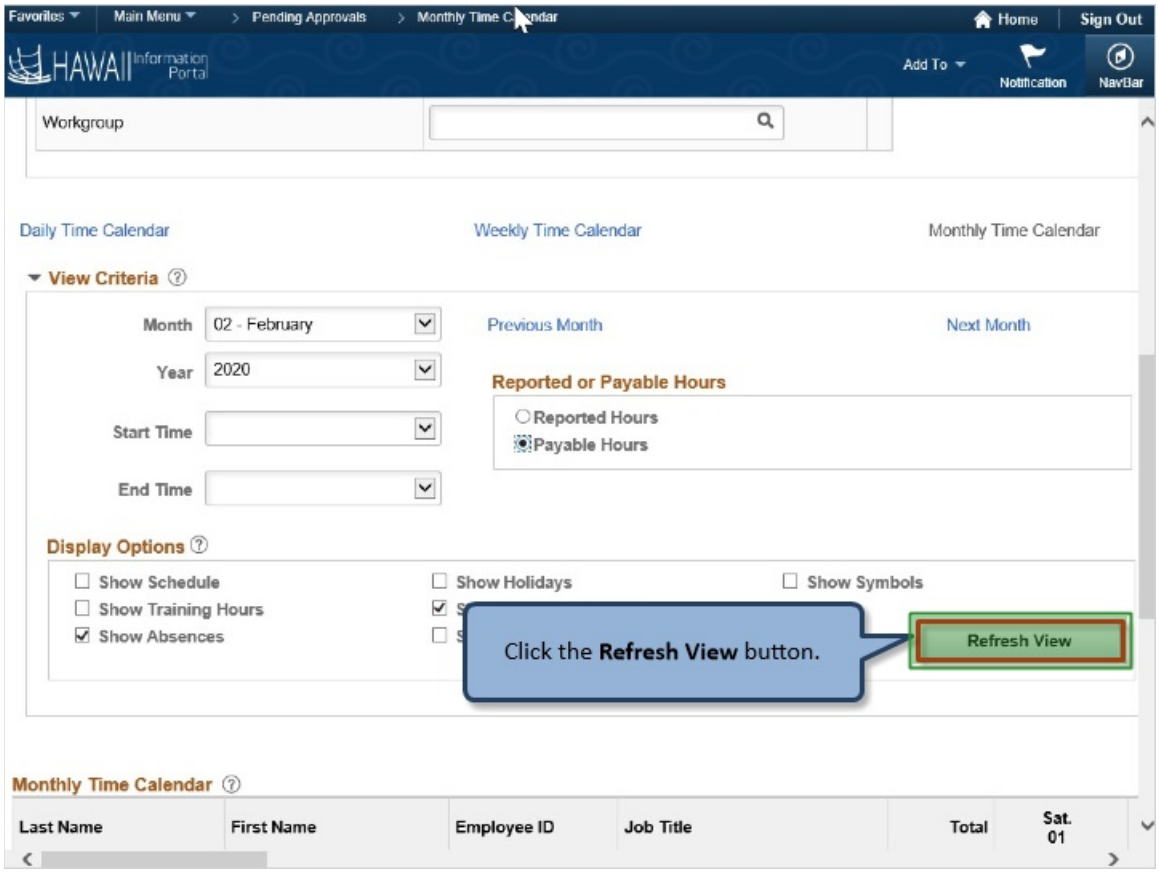


In the **Display Options** section, you can select to view additional items, such as absences and planned overtime.

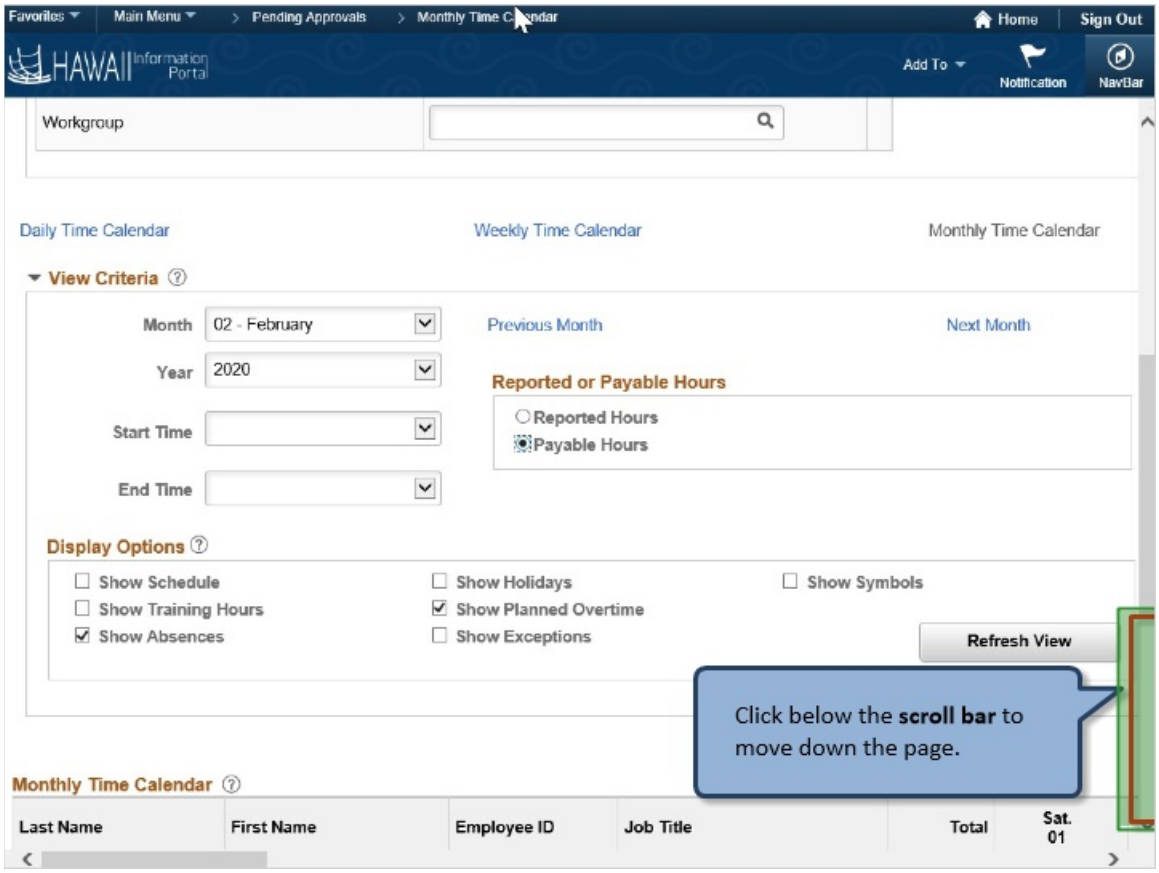


In this example, you want to view payable hours for the month of February.

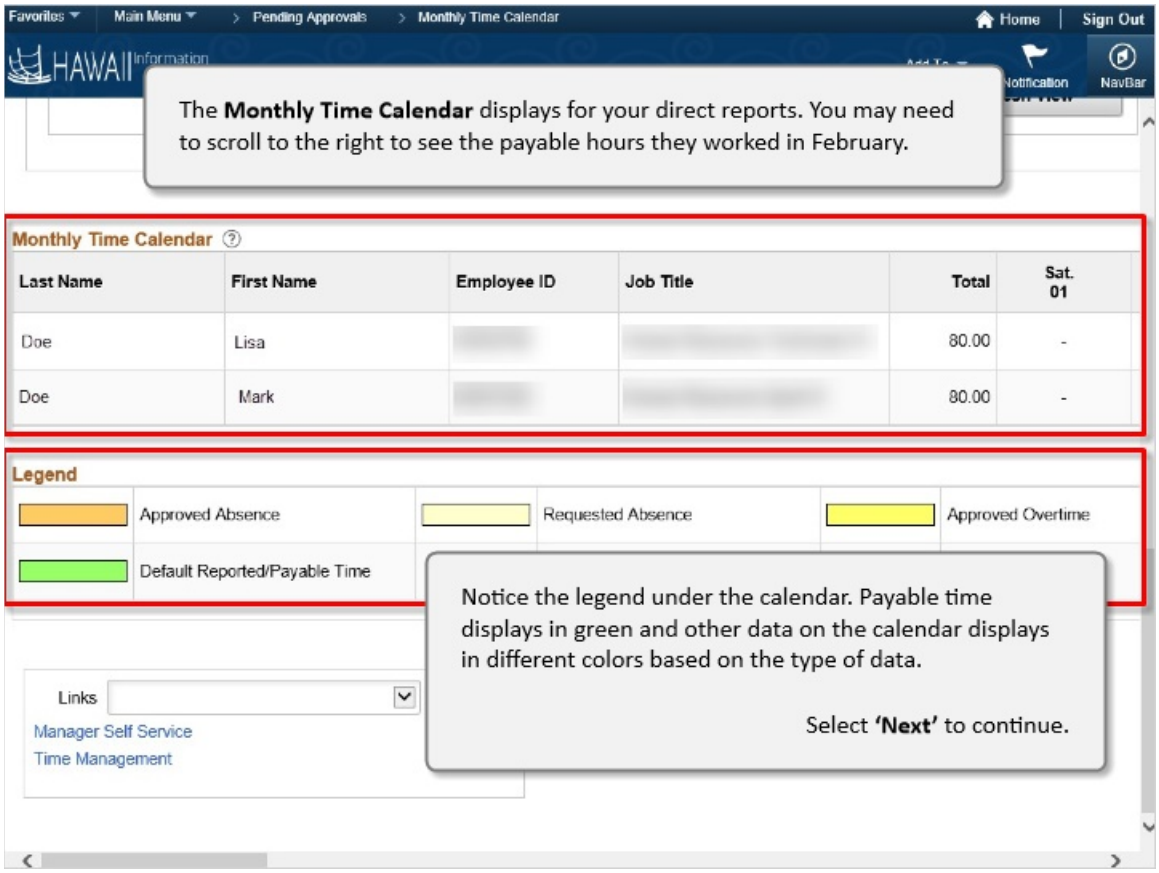
Click the **Payable Hours** radio button.



Click the **Refresh View** button.

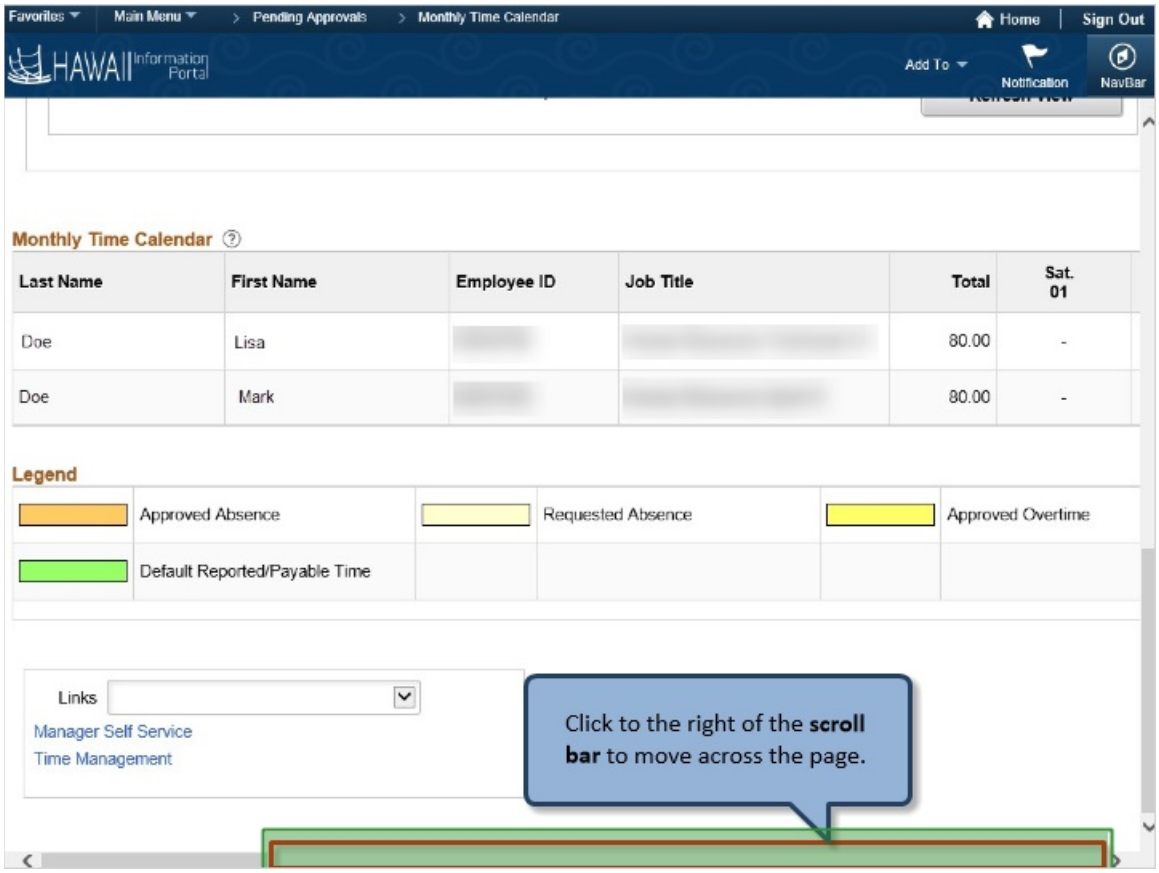


Click below the **scroll bar** to move down the page.

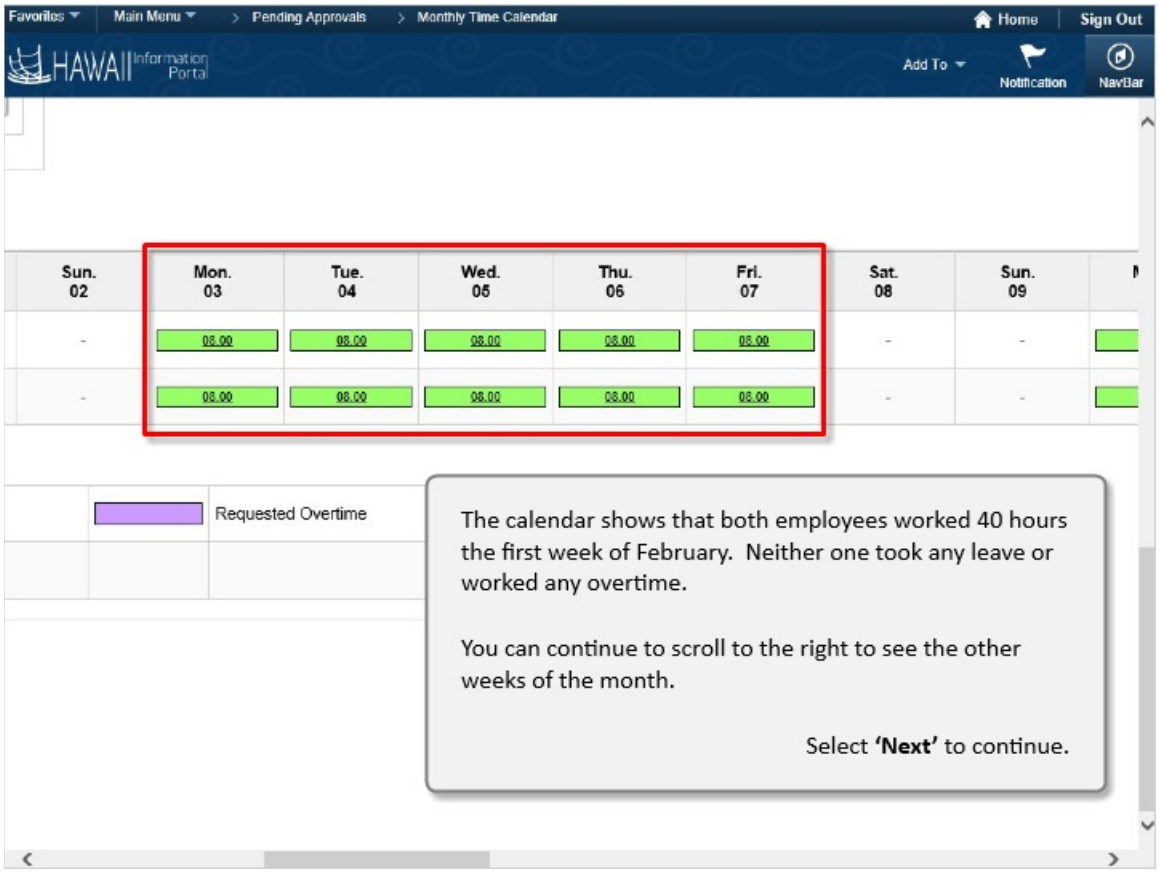


The **Monthly Time Calendar** displays for your direct reports. You may need to scroll to the right to see the payable hours they worked in February.

Notice the legend under the calendar. Payable time displays in green and other data on the calendar displays in different colors based on the type of data.

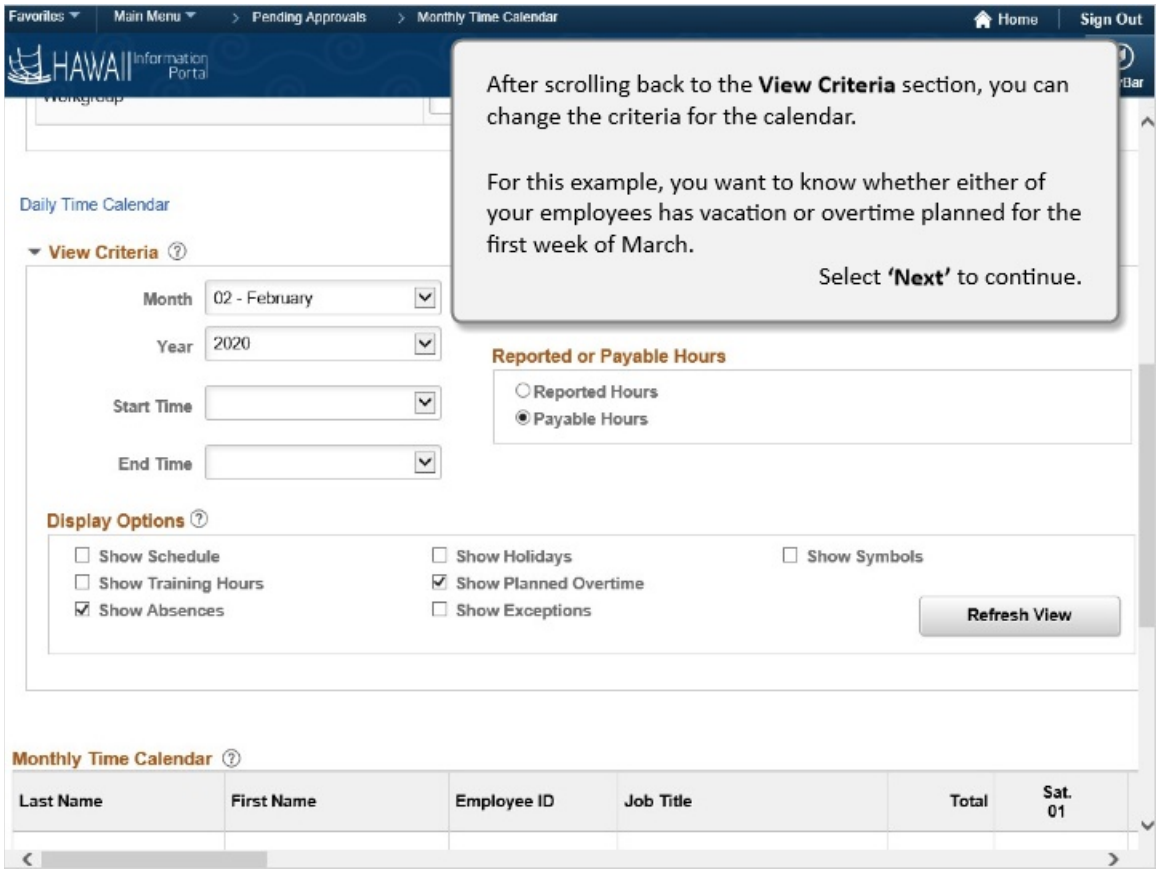


Click to the right of the **scroll bar** to move across the page.



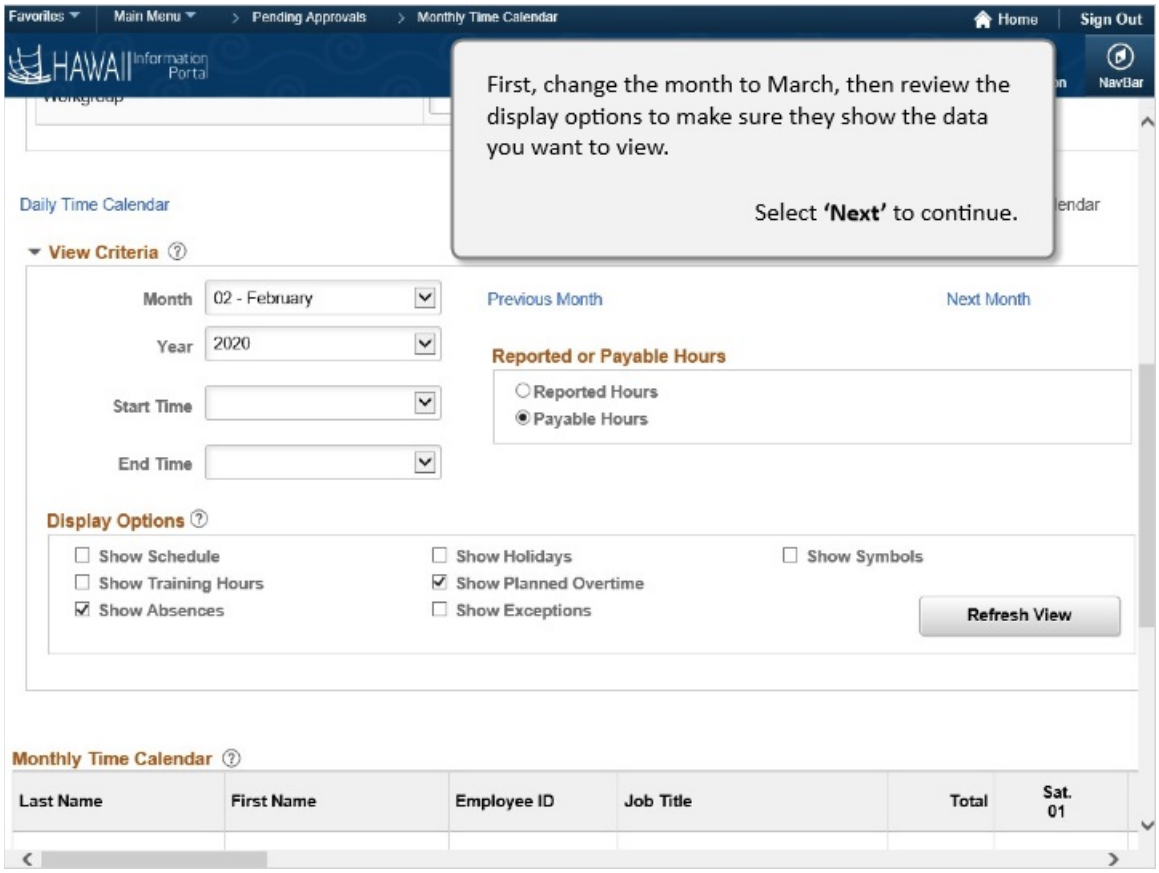
The calendar shows that both employees worked 40 hours the first week of February. Neither one took any leave or worked any overtime.

You can continue to scroll to the right to see the other weeks of the month.

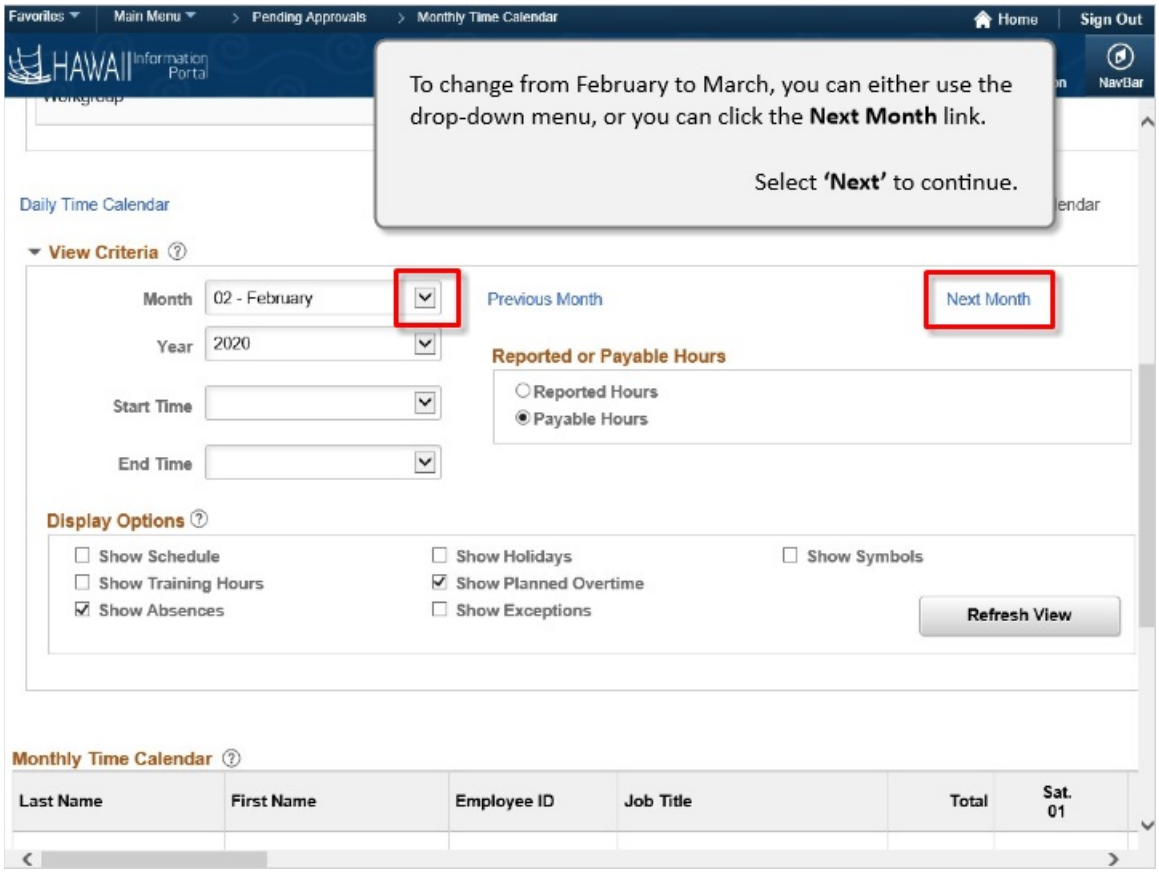


After scrolling back to the **View Criteria** section, you can change the criteria for the calendar.

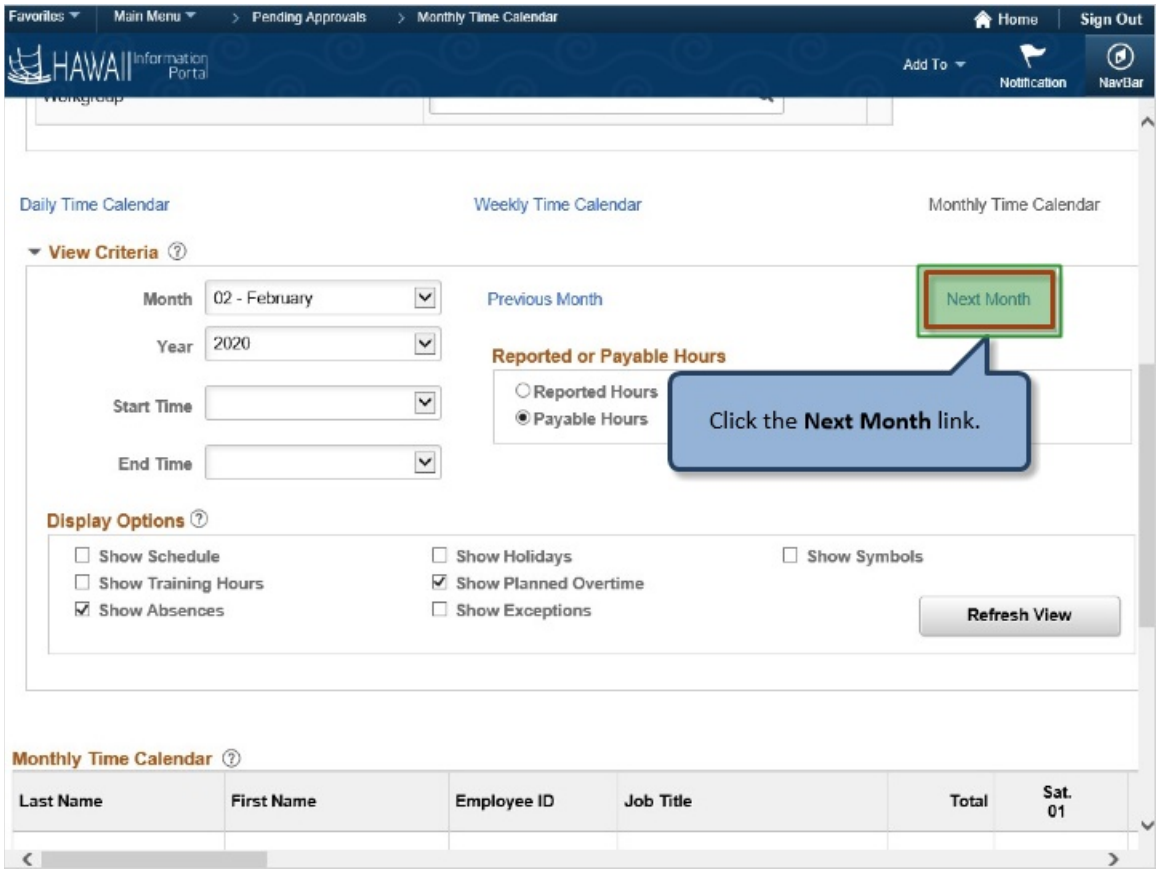
For this example, you want to know whether either of your employees has vacation or overtime planned for the first week of March.



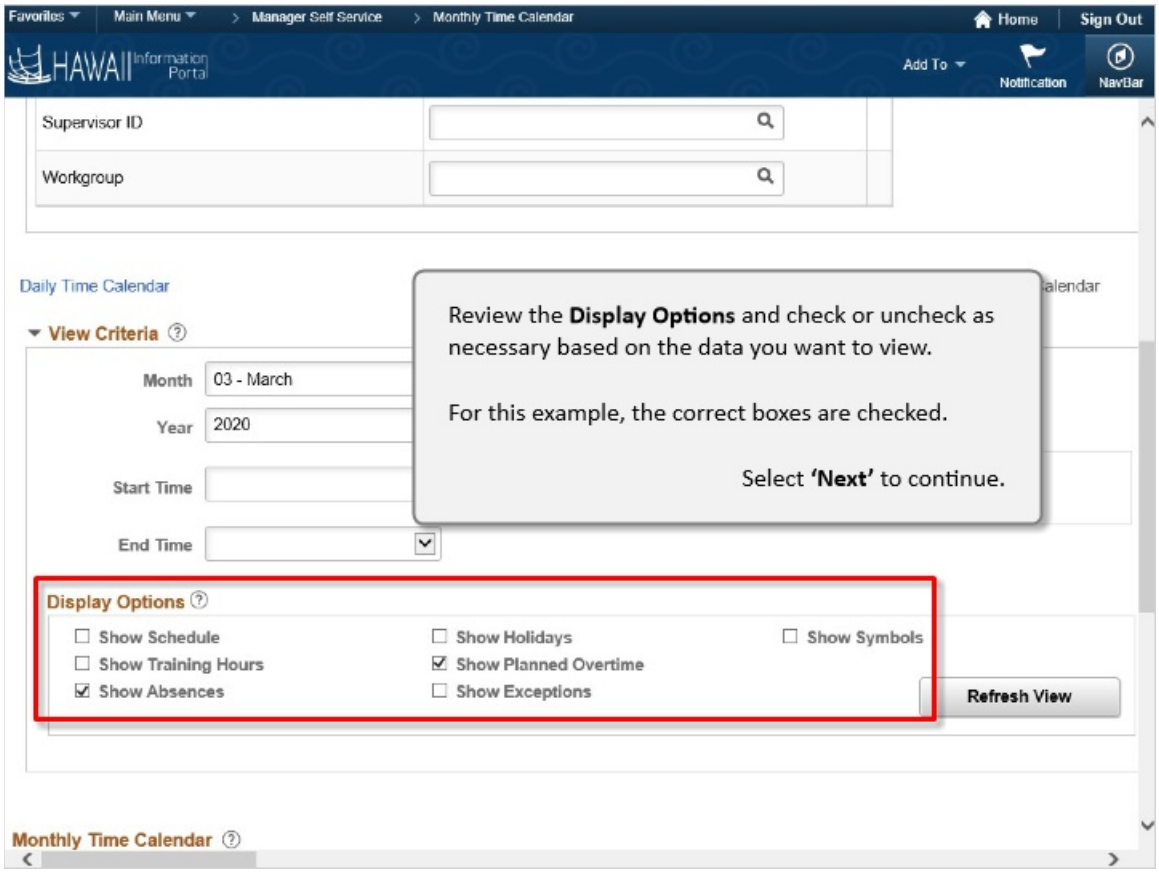
First, change the month to March, then review the display options to make sure they show the data you want to view.



To change from February to March, you can either use the drop-down menu, or you can click the **Next Month** link.

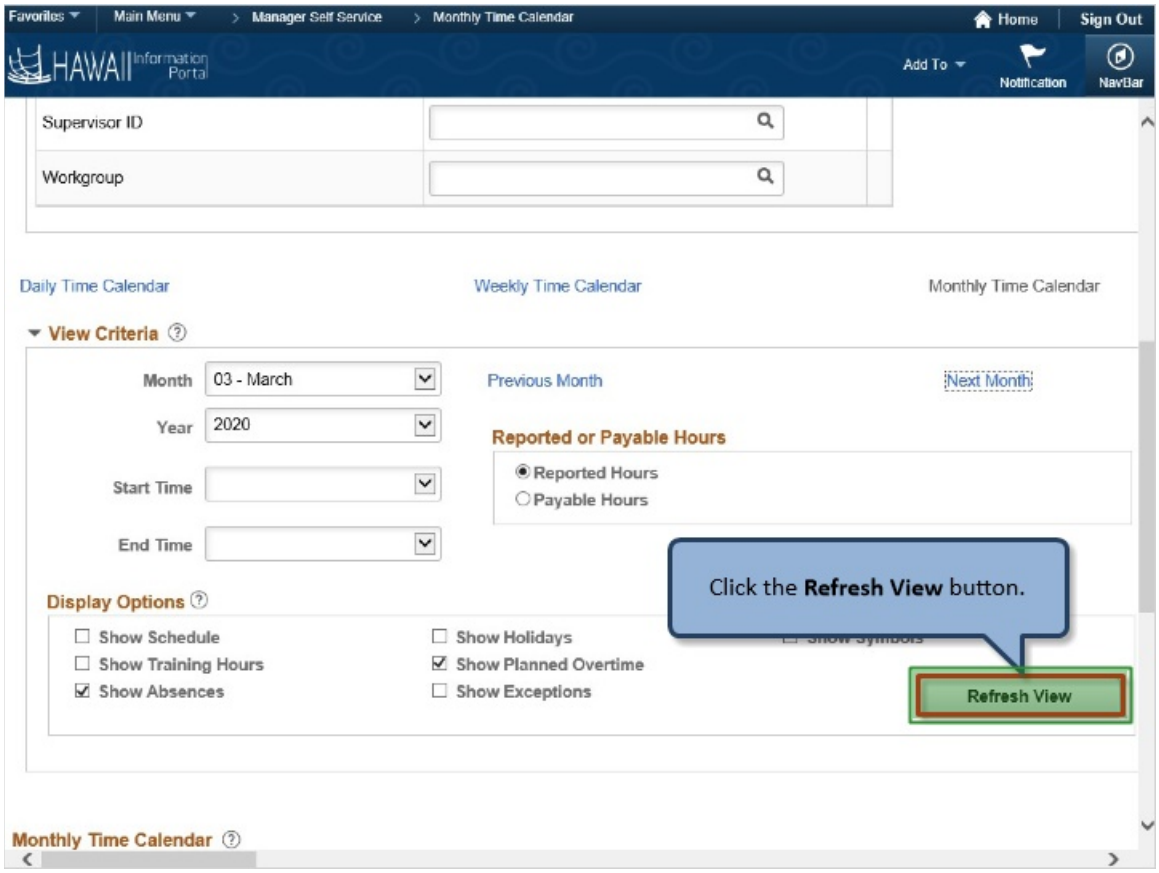


Click the **Next Month** link.

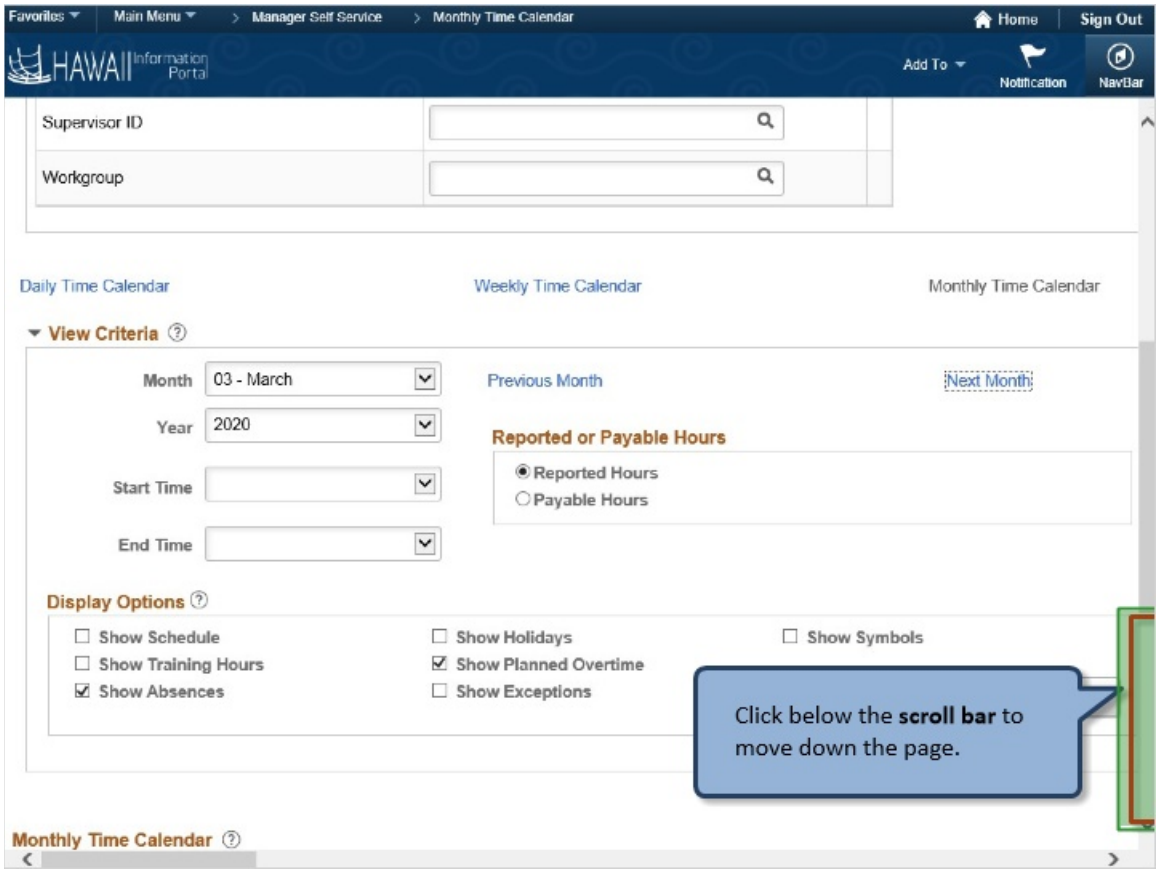


Review the **Display Options** and check or uncheck as necessary based on the data you want to view.

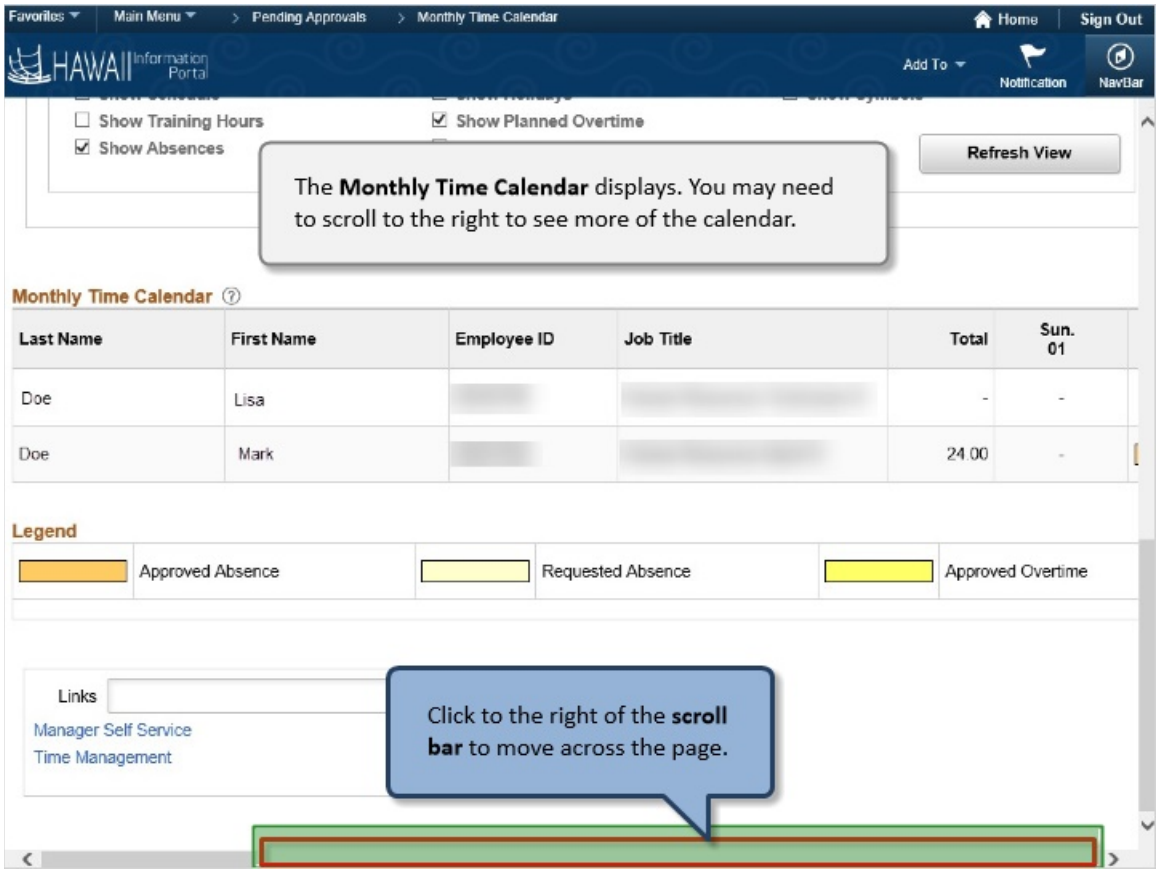
For this example, the correct boxes are checked.



Click the **Refresh View** button.

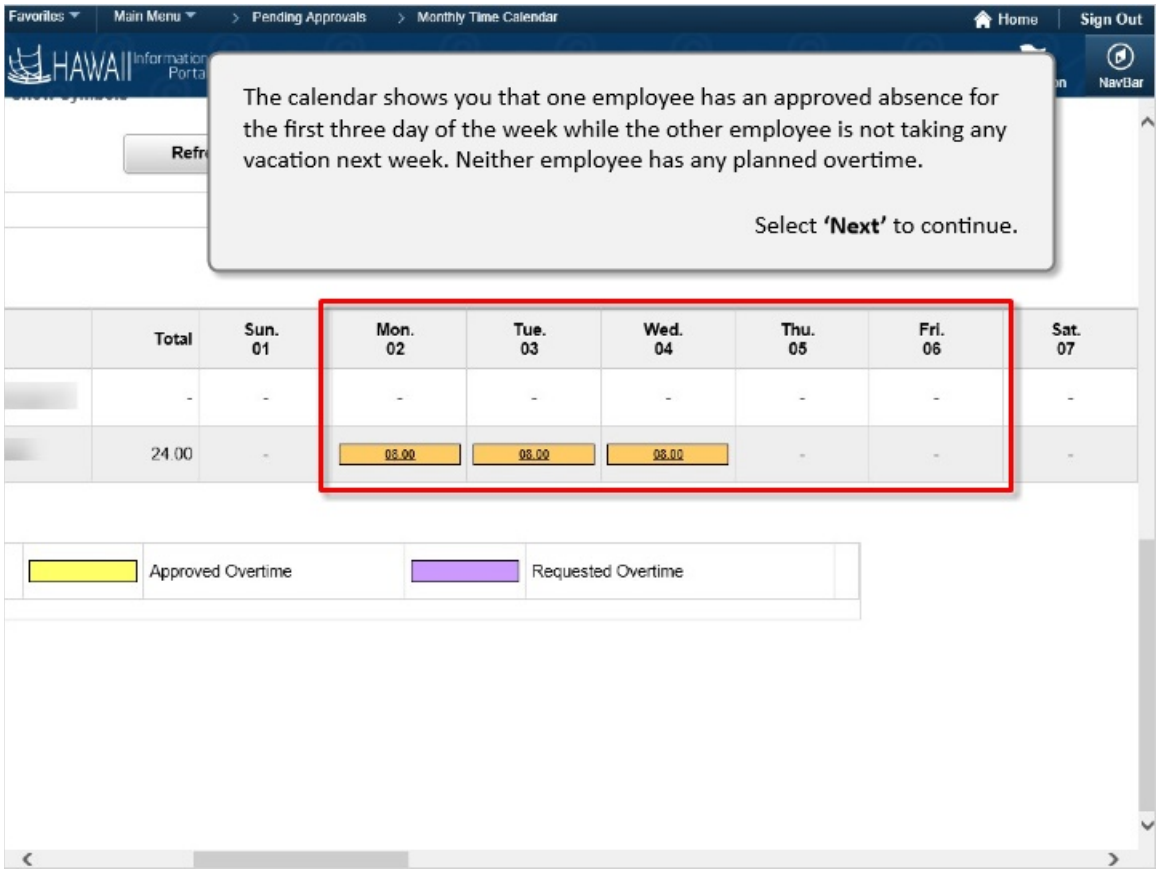


Click below the **scroll bar** to move down the page.

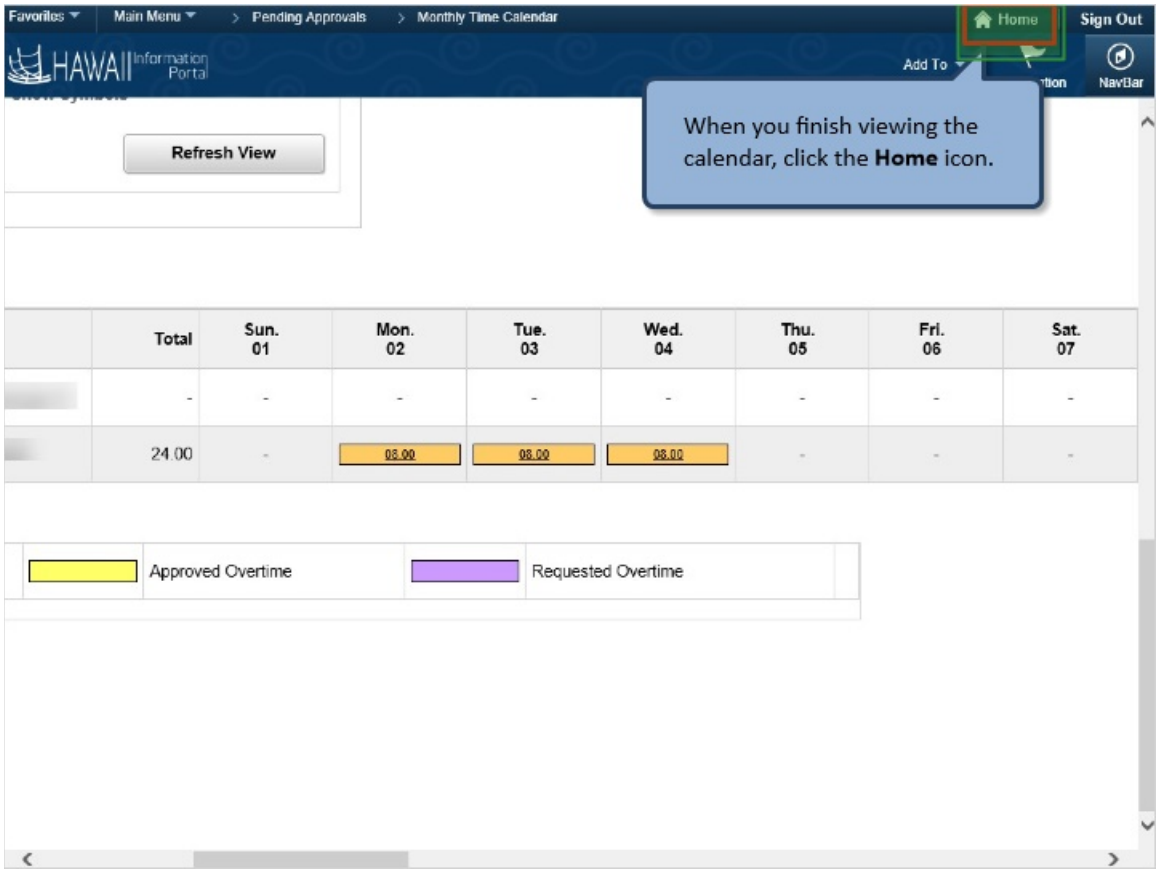


The **Monthly Time Calendar** displays. You may need to scroll to the right to see more of the calendar.

Click to the right of the **scroll bar** to move across the page.



The calendar shows you that one employee has an approved absence for the first three day of the week while the other employee is not taking any vacation next week. Neither employee has any planned overtime.

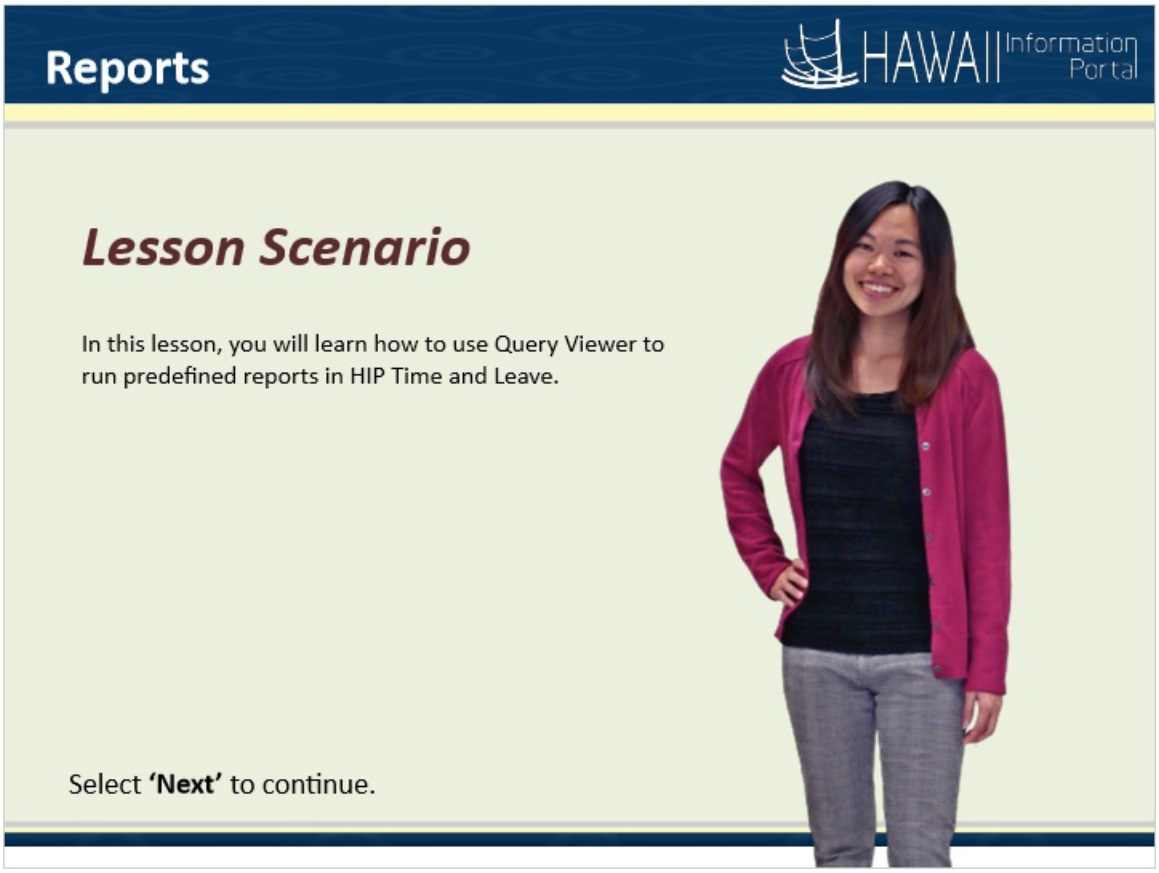


When you finish viewing the calendar, click the **Home** icon.

Congratulations!

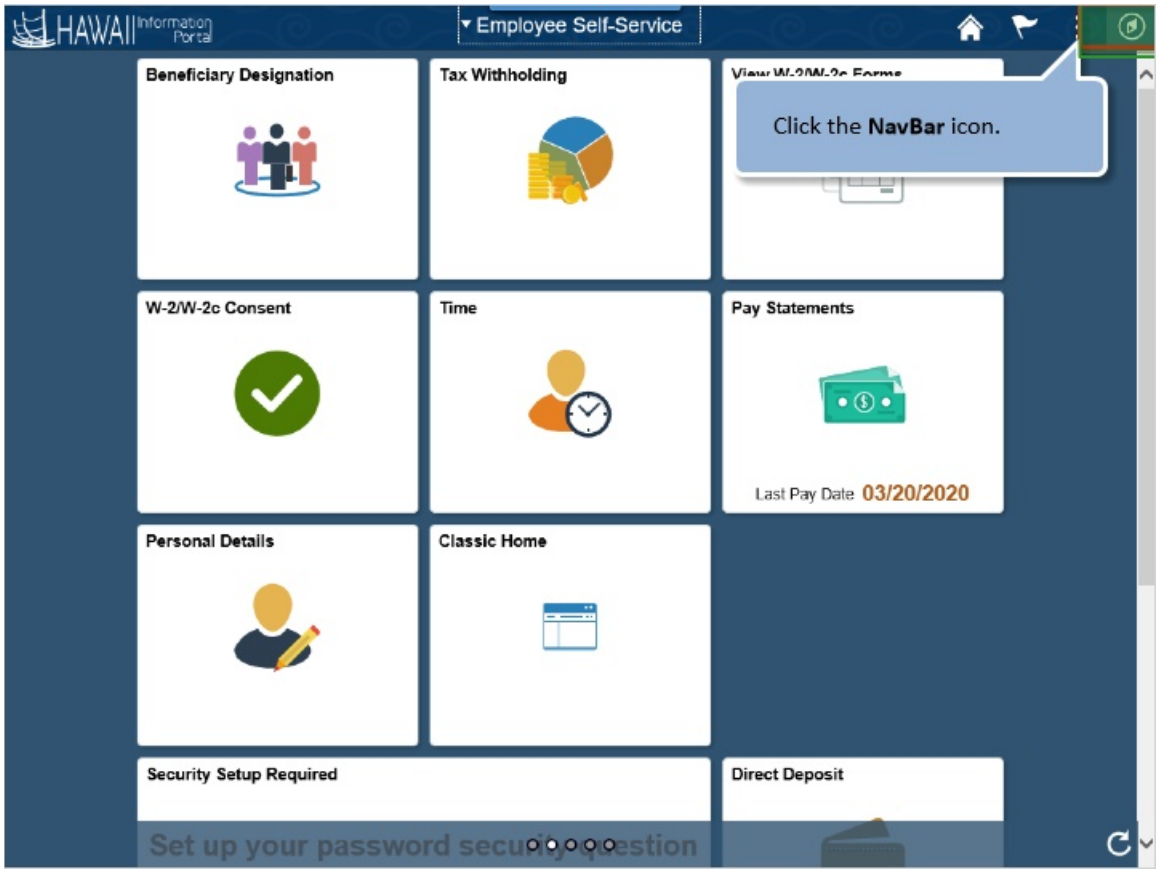
You've successfully completed this lesson.

Reports

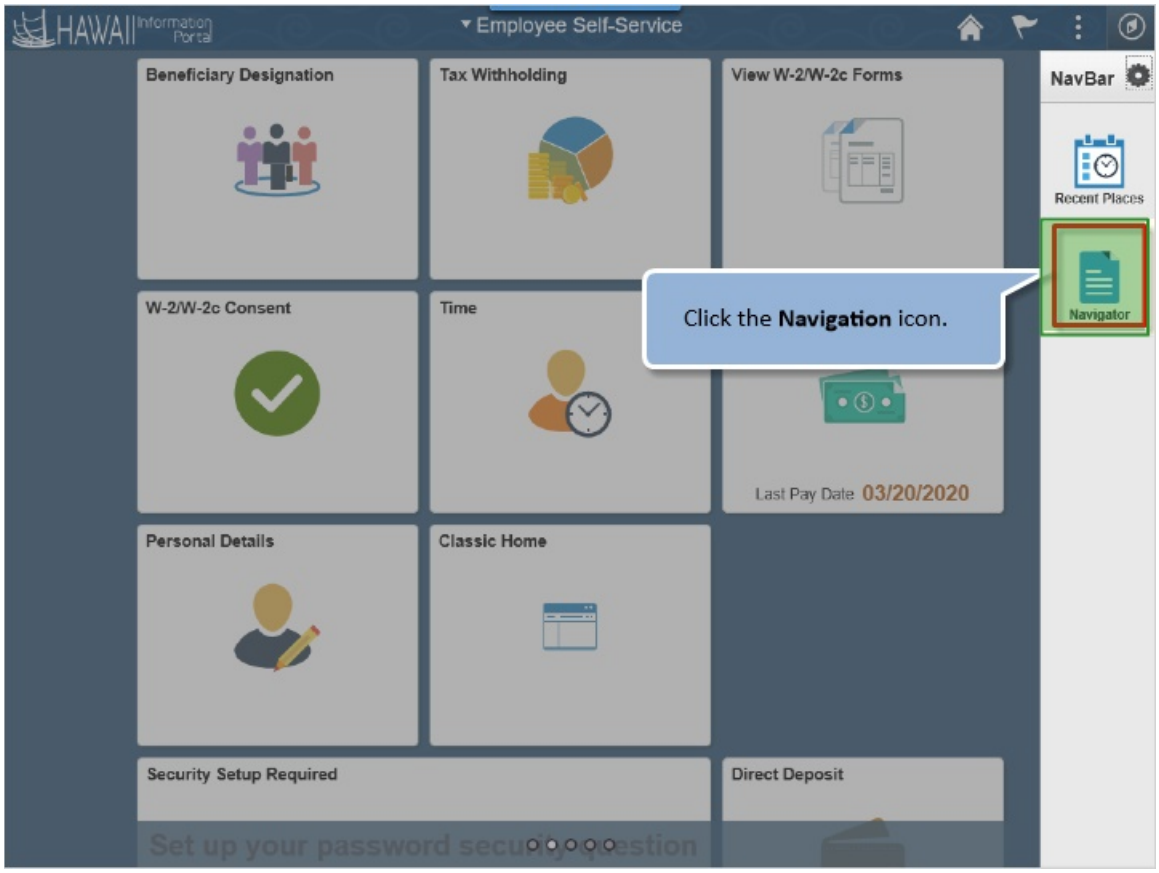


Lesson Scenario

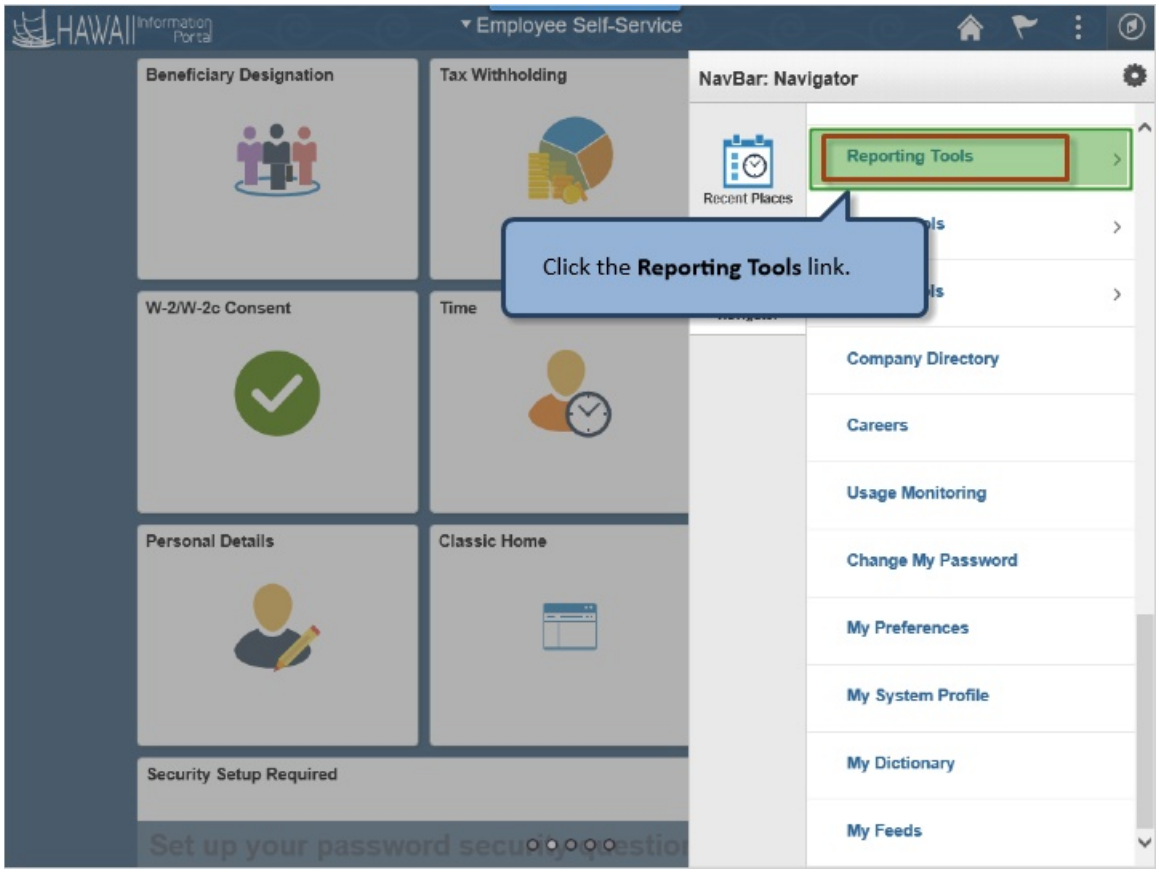
In this lesson, you will learn how to use Query Viewer to run predefined reports in HIP Time and Leave.



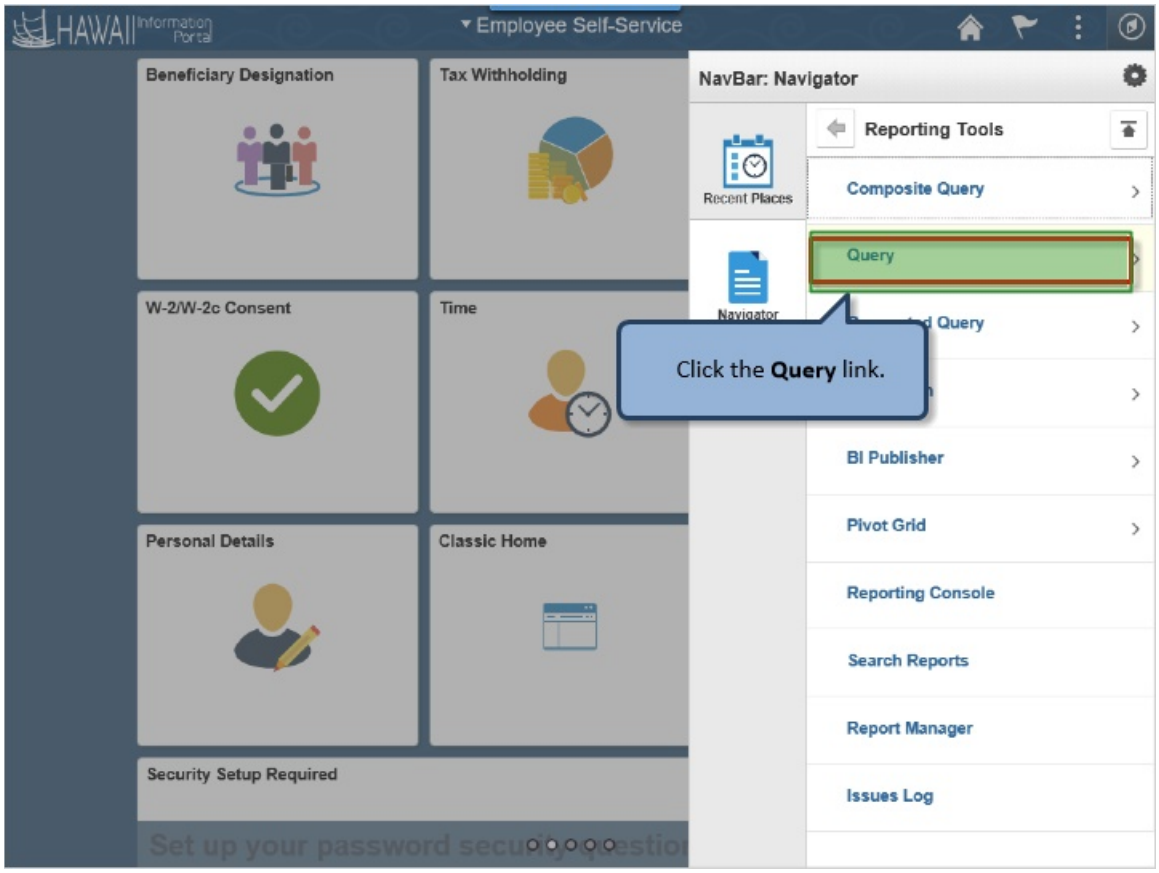
Click the **NavBar** icon.



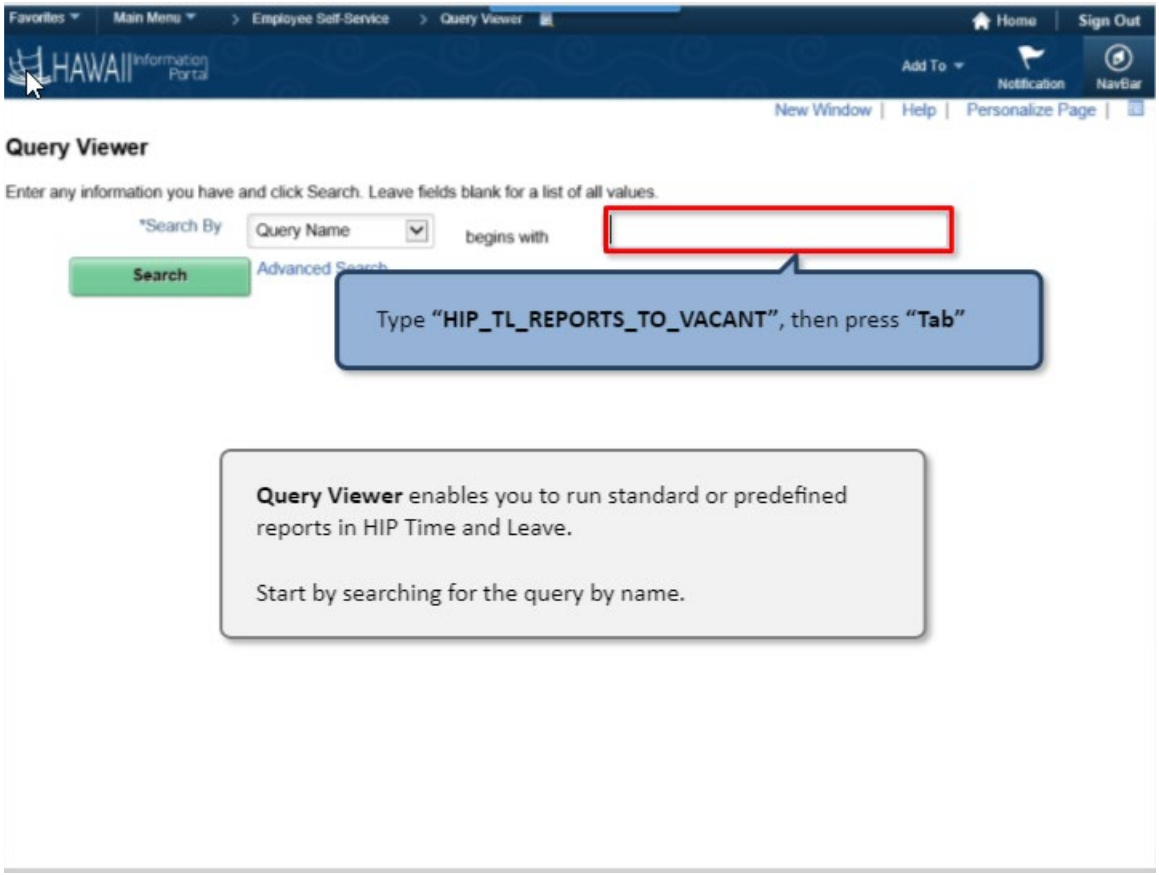
Click the **Navigation** icon.



Click the **Reporting Tools** link.



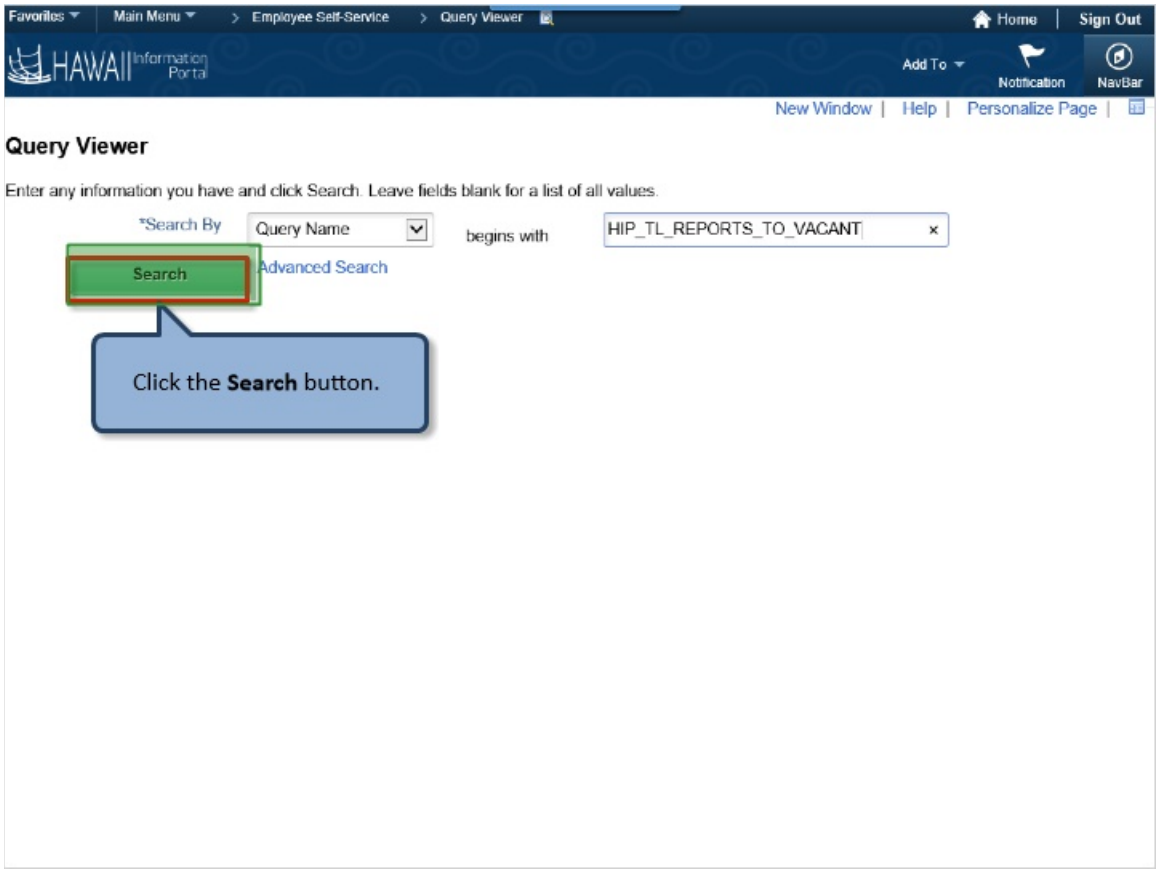
Click the **Query** link.



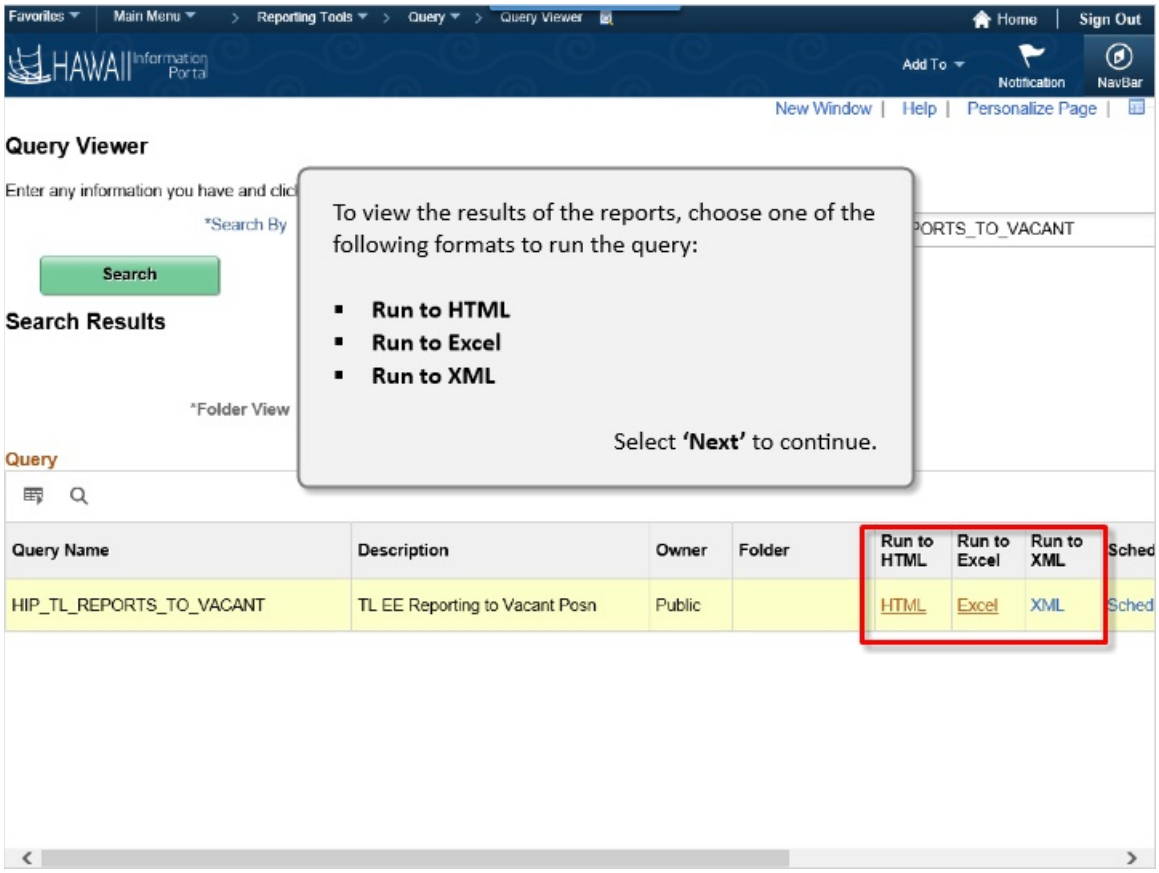
Type **"HIP_TL_REPORTS_TO_VACANT"**, then press **"Tab"**

Query Viewer enables you to run standard or predefined reports in HIP Time and Leave.

Start by searching for the query by name.

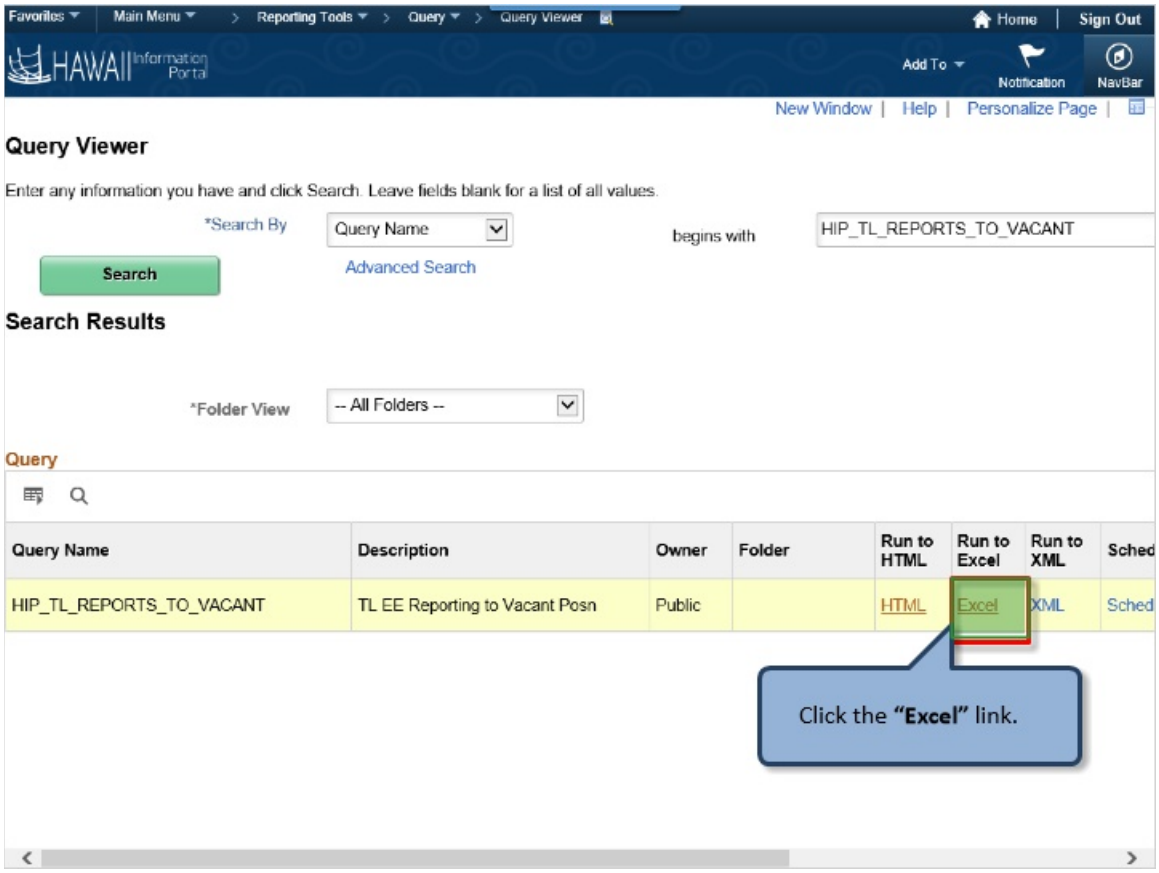


Click the **Search** button.

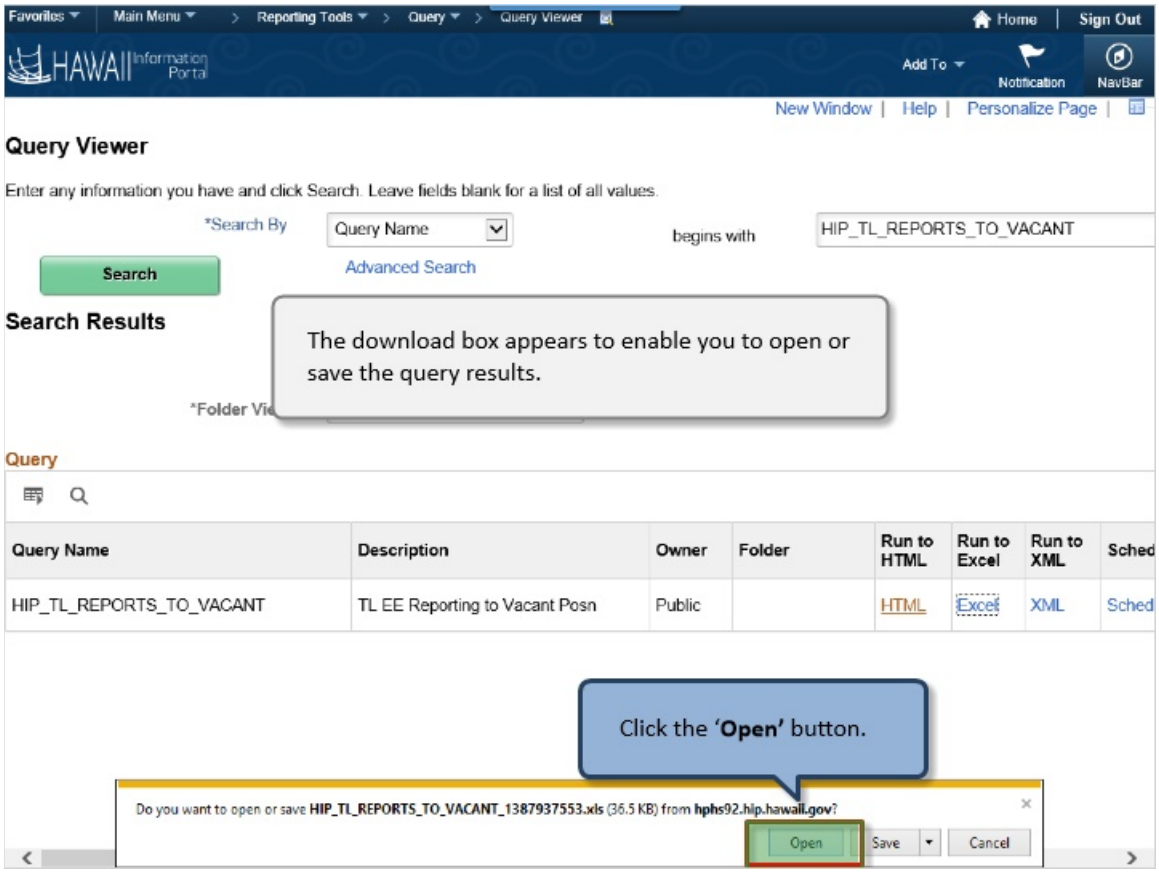


To view the results of the reports, choose one of the following formats to run the query:

- **Run to HTML**
- **Run to Excel**
- **Run to XML**

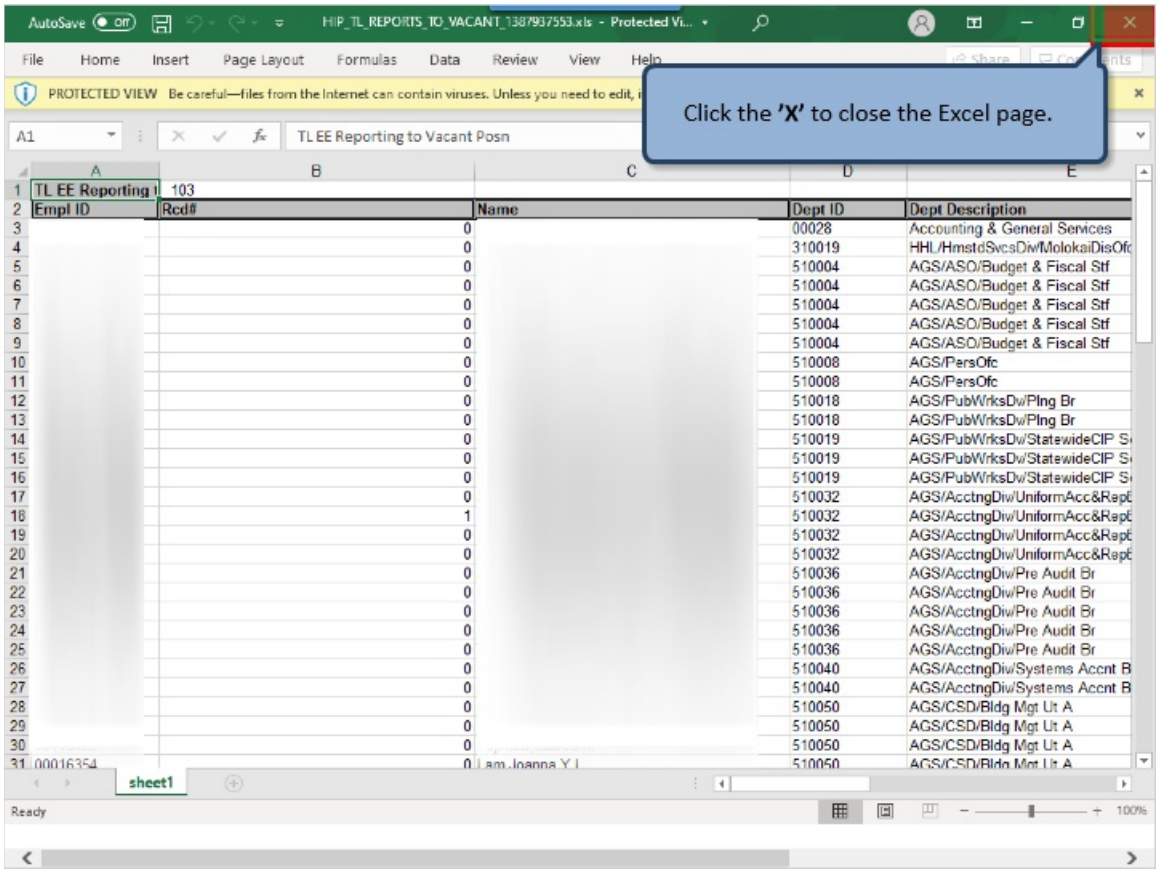


Click the **"Excel"** link.

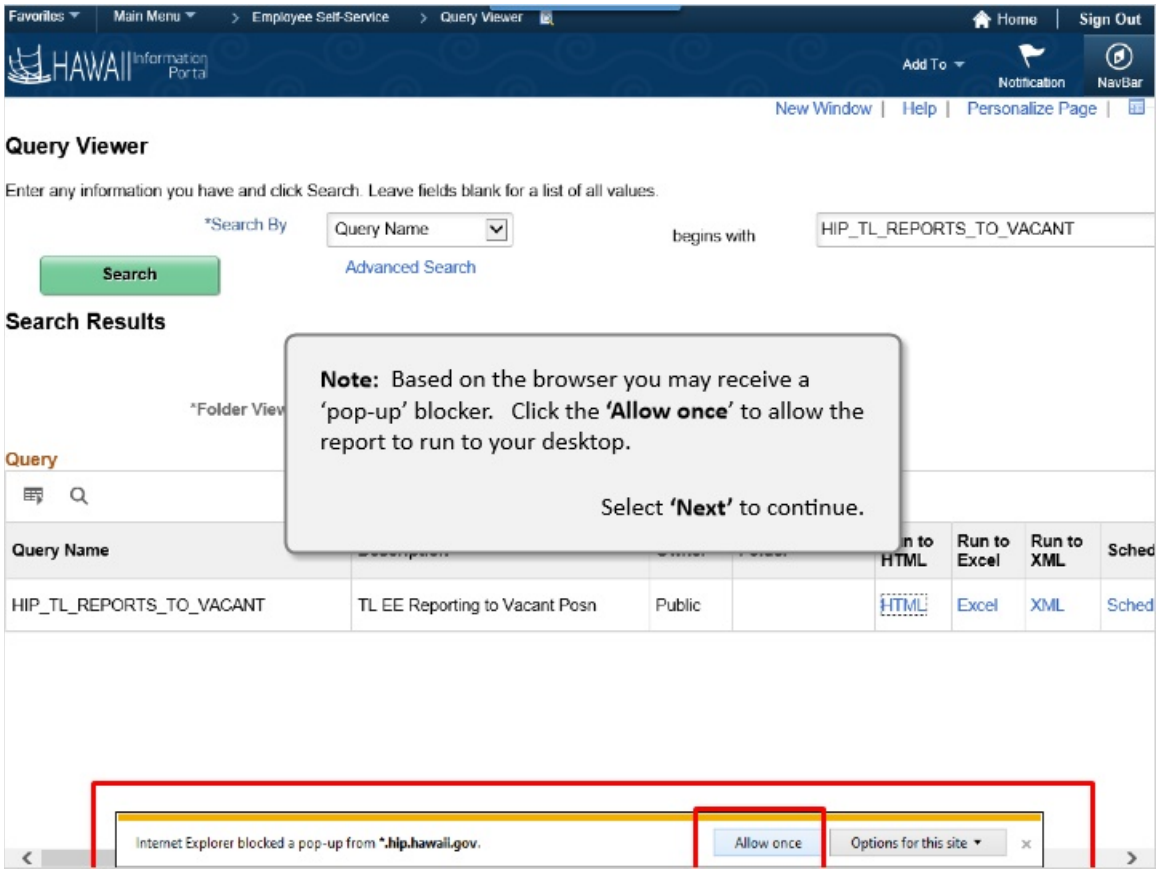


The download box appears to enable you to open or save the query results.

Click the '**Open'** button.



Click the **'X'** to close the Excel page.



Note: Based on the browser you may receive a 'pop-up' blocker. Click the '**Allow once**' to allow the report to run to your desktop.

Congratulations!

You've successfully completed this lesson.

End

Congratulations!

You've completed

this lesson.