



# Timesheet District Administrator Manual

**TABLE OF CONTENTS**

TABLE OF CONTENTS.....2

    CONFIGURING TIMESHEET SETUP .....3

CONFIGURING SCHEDULES.....6

    PAY PERIOD SCHEDULE .....6

    TIMESHEET SCHEDULE .....7

    HOLIDAY SCHEDULE .....8

CONFIGURING POSITIONS AND ACTIVITIES.....9

    POSITIONS .....9

    ACTIVITY TYPES .....11

    ACTIVITIES.....12

    ACTIVITIES IN POSITIONS.....13

CONFIGURING SHIFTS.....15

    EMPLOYEE SHIFTS.....16

    EMPLOYEE POSITIONS.....17

    EMPLOYEE ADMIN.....19

CONFIGURING APPROVALS.....20

    CREATING WORK GROUP.....20

    CREATING WORK FLOW.....22

    TIMESHEET REVIEW GROUP .....24

    AUTOMATED WORK FLOW DEFINITION .....21

TIMESHEET SUBMITTAL .....29

TIMESHEET APPROVAL .....30

## CONFIGURING TIMESHEET SETUP

Turn on Timesheet functionality in Kiosk

1. In District Configuration under Kiosk Functionality check the box for Employee Timesheet and apply changes.

**KIOSK Functionality (ON/OFF)**

**Apply Changes**

Select the Check Box(es) next to the KIOSK Function(s) that are to be available to your district users.

- Announcement Board
- Leave Requests
- Leave Export
- Leave Approval AWF
- Leave Analysis Parameters
- Pay Slips (USPS)
- Pay Slips (PDF)
- Performance Reviews
- Substitute Needed
- Individual Professional Development Plan (IPDP)
- ITC Individual Professional Development Plan (IPDP)
- Employee Time Sheet**
- W-2 Wage and Tax Statements

**Apply Changes**

2. Nightly job will run to update Timesheet with appropriate Kiosk information.

1. After nightly job has run the district/organization will need to be made active in Timesheet.
3. This is done by Kiosk/ITC Admin
4. Click on Timesheet.



5. Click on Maintain Organization.



6. Click on pencil next to district name.

Organization

Organization	Is Active?	Is External Record?	Kiosk District IIRN	Kiosk District Name	Last Sync'd	Status
Lexington Local SD	Yes	Yes	49437	Lexington Local Sd	10/21/2016 10:22:00.231224 AM	-
Ontario Local SD	Yes	Yes	49478	Ontario Local Sd	10/21/2016 10:17:00.153951 AM	-
Valley Local SD	No	Yes	49643	Valley Local Sd	-	-

7. Change status to Active.

Additional configuration that needs to be complete with input from the district.

A. The Timesheet module can be turned off by selecting Yes or No

B. Affordable Care Act (ACA) Lookback Period allows you to select how many months you want to review in the past to track requirements of the ACA. The maximum number of months for the lookback period is 12.

C. You can select which Position Types to include in the Timesheet process.

- R – Regular
- S – Supplemental
- T – Temporary

D. You can select which Position Job Statuses to include in the Timesheet process.

- A – Active
- D – Deleted
- I – Inactive
- T – Terminated

E. Select which Position Appointment Type to include in the Timesheet process. Classified or Certified.

F. Select which Position Pay Groups to include in the Timesheet process. This list will be generated based on the current pay groups a district uses.

G. Select which position, Daily or Hourly to include in the Timesheet process.

H. Select Yes or No to include staff that have a concealed status.

I. The configuration process will create a default shift type. This shift type can be created so you choose what you would like to do or it can be assigned and synced to all employees.

J. Once you have completed the configuration you can synchronize the info with the Kiosk. It is recommended that this step be done at the end of the day.

The screenshot shows the 'Organization Form' interface. At the top right are 'Return' and 'Apply Changes' buttons. The form contains several sections:

- Name:** Madison Local SD
- Is Active?:** Yes (Callout A)
- Is External Record?:** Yes
- External Record Detail:** Kiosk District IRN/Name 49452 - Madison Local SD
- Affordable Care Act (ACA):** ACA Lookback Period -- Select Valu... Month(s) (Callout B)
- Synchronize Position Filter:**
  - Position Type(s): -- Select Value(s) -- (Callout C)
  - Position Job Status(es): x Active (Callout D)
  - Position Appointment Type(s): x Certified (Callout E)
  - Position Pay Group(s): x W x YY (Callout F)
  - Position Daily or Hourly: x Hourly (Callout G)
  - Concealed Flag: -- Select Value(s) -- (Callout H)
- Synchronize Shift Configuration:**
  - Create DEFAULT {8-5} Shift ONLY, do not assign to Employee Position(s) (Callout I)
  - Create DEFAULT {8-5} Shift ONLY, assign to ALL Employee Positions
  - Create DEFAULT {8-5} Shift, SYNC Kiosk/Aesop Shifts, do not assign to Employee Position(s)
  - Create DEFAULT {8-5} Shift, SYNC Kiosk/Aesop Shifts, assign to appropriate Employee Position(s)
- Synchronization NOW:**
  - Click the button below to run the Kiosk Information Synchronization Process NOW!
  - This process will update Information from the Kiosk to the Timesheet.
  - Last Kiosk Information Synchronization completed on 02/09/2018 01:59:29.092543 PM
  - Synchronize Kiosk Info Now (Callout J)

After the first initial synchronization is done you will want to schedule Kiosk Information – Initiate Synchronization Job to run. The minimum time it can be set to run is every 5 minutes. This job updates position information but also updates Timesheets with the Kiosk leave request information.

**Kiosk Information - Initiate Synchronization Job**

**Synchronization Job for Kiosk Information:**

- o District {Organization}
- o Employees, Positions
- o Position Supervisors {Timesheet Review Group}
- o Leave Types {Activity, Activity Types}
- o Leave Requests {Timesheet Entry}

**has NOT yet been SCHEDULED.**

Select an INTERVAL below and Click the "Schedule Kiosk Information Synchronization Job" button to SCHEDULE the job for this ORGANIZATION.

-- Select an Interval Value --

**Schedule Kiosk Information Synchronization Job**

- 5 min
- 10 min
- 15 min
- 20 min
- 25 min
- 30 min
- 35 min
- 40 min
- 45 min
- 50 min
- 55 min
- 1 hour
- 1.5 hours
- 2 hours
- 3 hours

## CONFIGURING SCHEDULES

The next steps will need to be completed with your help by a district staff person that has the Leave Administrator role in the Kiosk.



### Pay Period Schedule

This step is setting up the pay period and not the time sheet schedule.

1. Click on Schedules
2. Click on Pay Period Schedule
3. Click Create

A. Enter the name of the Pay Period for example you can enter Bi-Weekly Pay Period.

B. Select that you want the status to be Running.

C. Select Yes to have this pay period be the default.

**NOTE: You can only have one schedule set as the default. If you create multiple schedules, only select one to be the default.**

A screenshot of a web form titled 'Pay Period Schedule'. The form contains several fields and options, each marked with a red letter in a circle. A 'Return' button and an 'Apply Changes' button are in the top right. The fields are: Name (text input, A), Schedule Status (dropdown, B), Is this the default? (radio buttons, C), Closing Time (dropdown, D), 1st, 2nd, and 3rd Reminders (dropdowns, E), If Closing Day Falls on Holiday or Weekend (radio buttons, F), Payroll Frequency (dropdown, G), Schedule Starting Date (calendar icon, H), First Month to Run the Schedule (dropdown, I), Last Month (dropdown, I), Number of Future Periods Available (dropdown, J), and Closing Day of the Week (dropdown, K).

D. Select the closing time for your pay period, for example 5:00 PM.

E. Select how often you want reminders for when pay period is ending. You can leave these options blank to not send notifications.

F. Select what to do if the pay period ending date falls on a holiday or weekend.

G. Select if you pay period is Bi-Weekly, Monthly or Semi-Monthly. If you select Monthly or Semi-Monthly you will be prompted to select closing pay dates (dates paid).

H. Select the date of when you want your pay period to start.

I. Select your first month and last month to run a pay period schedule.

J. Select the number of future pay periods that will be displayed in Timesheet.

K. Select the closing day of the week for your pay period.

4. Click apply changes

## Timesheet Schedule

This step is setting up the timesheet schedule.

1. Click on Schedules
2. Click on Timesheet Schedule
3. Click Create

A. Enter the name of the Timesheet Period for example you can enter Bi-Weekly or Weekly.

B. Select that you want the status to be Running.

C. Select Yes to have this timesheet schedule to be the default.

**NOTE: You can only have one schedule set as the default. If you create multiple schedules, only select one to be the default.**

The screenshot shows a 'Timesheet Schedule' form with the following fields and callouts:

- A:** Name (Weekly Timesheet Submittal Schedule)
- B:** Schedule Status (Running)
- C:** Is this the default? (Yes)
- D:** Closing Time (07:00 PM)
- E:** 3rd Reminder (blank)
- F:** If Closing Day Falls on Holiday or Weekend (Do Nothing)
- G:** Timesheet Frequency (Bi-Weekly (Every 2 weeks))
- H:** Schedule Starting Date (11/12/2017)
- I:** Last Month (June)
- J:** Number of Future Periods Available (2)
- K:** Day of the Week (Friday)
- L:** Pay Period Schedule (-- Select Period to Display --)

D. Select the closing time for your Timesheets, for example 5:00 PM may be the time that they need to be completed by.

E. Select how often you want reminders for when the timesheet is due. You can have the first reminder set so many day prior to the timesheet being due. If you leave these options blank no notifications will be sent.

F. Select what to do if the timesheet ending date falls on a holiday or weekend.

G. Select if your timesheet is Weekly, Bi-Weekly, Monthly or Semi-Monthly. If you select Monthly or Semi-Monthly you will be prompted to select closing pay dates (dates paid).

H. Select the date of when you want your timesheet to start.

I. Select your first month and last month to run a timesheet schedule.

J. Select the number of future timesheets that will be displayed to the employee.

K. Select the closing day of the week for your pay period.

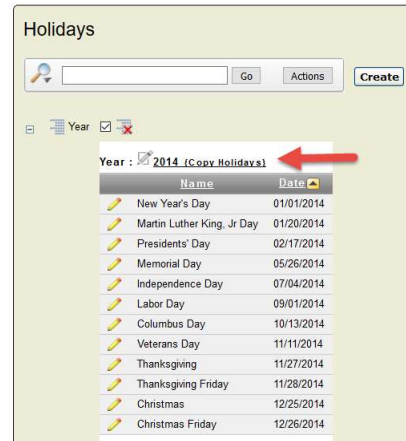
L. Select the pay period schedule that will coincide with this timesheet schedule. This setting is really only for display purposes to show how the pay period works with the timesheet schedule.

4. Click apply changes

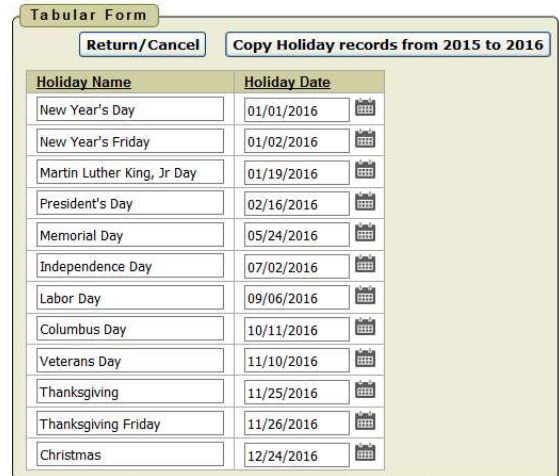
## Holiday Schedule

After you have the holiday schedule setup those holidays will display on the timesheet for the employee.

1. Click on Schedules
2. Click on Timesheet Schedule
3. Click Copy Holidays



4. Use the Calendar Icon to enter the correct date for the holiday.
5. When finished click Copy Holiday Records from 20XX to 20XX.





If you need to delete a date click on the pencil icon next to the date.

1. Select the double arrows pointing to the left to move all positions to the left.
2. Click Assign to Positions
3. Click Apply Changes
4. Click Delete

**Holiday** Return Delete Apply Changes

Name: Veterans Day  
Date: 11/10/2018

**Manage Holiday Assignments to Position** Assign to Positions

Tutor	Adult Education Director Associate Principal 5/6 Grades Caf Supervisor Director Of Career Technical Education Director Student Services Elementary Principal High School Principal Meeting Expenses Operations Supervisor Principal 7/8 Middle School Speech Therapy Superintendent Technology Coordinator Transportation Director Treasurer
-------	--

Assign to Positions

## CONFIGURING POSITIONS AND ACTIVITIES

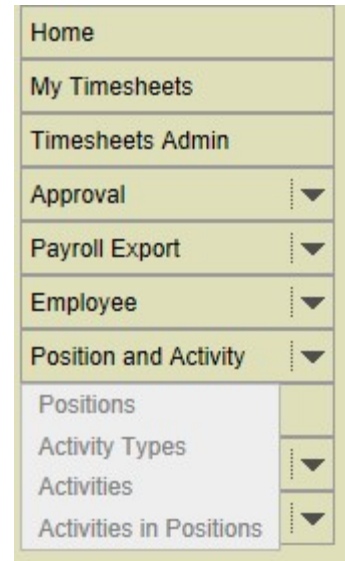
### Positions

Employees and positions are pulled from Kiosk. For staff to be seen within Timesheet they must be registered in Kiosk and have an active JOB within USPS.

It is important to cleanup positions first before creating shifts

1. Review each position and Identify jobs that should be deleted

**Note:** If you are not seeing all positions, uncheck the Timesheet Required = "Yes" filter.



**Positions**

Search:  Go Actions Create

- Part Time Position? = 'No'
- Part Time Position? = 'Yes'
- Position Deactivated? = 'No'
- Position Deactivated? = 'Yes'
- Substitute Position? = 'No'
- Substitute Position? = 'Yes'
- Timesheet Auto Insert = 'No'
- Timesheet Auto Insert = 'Yes'
- Timesheet Required? = 'No'
- Timesheet Required? = 'Yes'
- Timesheet Required?
- Is External Record?

**Timesheet Required? : Yes, Is External Record? : Yes**

Name	Part Time Position?	Substitute Position?	Timesheet Auto Insert	Note	Timesheet Entry Type	Position Deactivated?
Operations Supervisor	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Technology Coordinator	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Treasurer	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Tutor	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No

**Timesheet Required? : No, Is External Record? : Yes**

Name	Part Time Position?	Substitute Position?	Timesheet Auto Insert	Note	Timesheet Entry Type	Position Deactivated?
Adult Education Director	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Associate Principal 5/6 Grades	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Caf Supervisor	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Director Of Career Technical Education	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Director Student Services	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Elementary Principal	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
High School Principal	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No
Meeting Expenses	No	No	No	AUTOINSERT FROM KIOSK	No Restriction	No

A. Select Yes or No if the position is deactivated for Timesheet.

B. Select the increment for rounding of the timesheet entry.  
Minimum is 5 minutes  
Maximum is 1 day.

C. Select the default Pay Period Schedule

D. Select the default Timesheet Schedule

The screenshot shows a web form titled "Position" with a "Tutor" position name. The form includes several dropdown menus and radio buttons. Red callout letters A through H are placed next to the following fields: A (Is Position Deactivated for TS?), B (Timesheet Entry Rounded to Nearest), C (Default Paydate Schedule), D (Default Timesheet Submission Schedule), E (It this a Part Time Position?), F (It this a Substutute Position?), G (Is Timesheet Completion Required?), and H (Is Timesheet Completion Automated?). At the bottom, there is an "Additional Notes" text area containing the text "AUTOINSERT FROM KIOSK". Buttons for "Return", "De-Activate", and "Apply Changes" are located at the top right of the form.

E. Select Yes or No if this position is part time

F. Select Yes or No if this is a substitute position

G. Select Yes or No if Timesheet Completion is required

H. Select Yes or No if you want the timesheet to be auto completed for this position

I. Leave Activities and Activities should already be assigned for this position.

J. Select the holidays to assign for this employee.

K. Click Apply Changes

**NOTE:** When making changes to positions you will also need to make those same changes under Employee > Employee Positions> Maintain All Employee Positions. The questions that appear in both places are - Is this a Part Time Position, Is this a Substutute Position, Is Timesheet Completion Required, and Is Timesheet Completion Automated need.

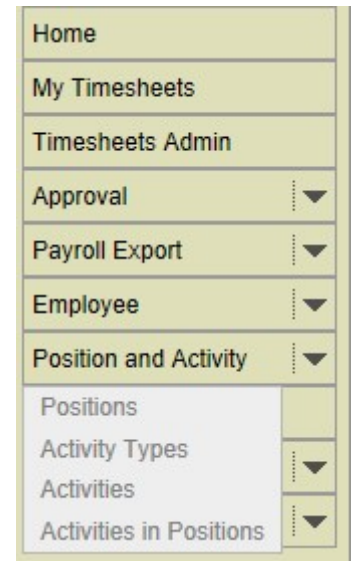
## Activity Types

The activity type is used as a category. For example you could have an activity type of Weekend Events or After School Events. After an Activity Type is created the next step is to create activities that would fall under the Activity Types.

Default Activity Types are already created for Kiosk Exceptions and Regular leave and for Kiosk Leave Types.

You can create additional Activity Types.

1. To create an Activity Type click on Position and Activity
2. Click on Activity Types
3. Click Create



4. Enter the name of the Activity Type
5. Enter a description
6. Click Create



If you need to edit an Activity Type click on the pencil.

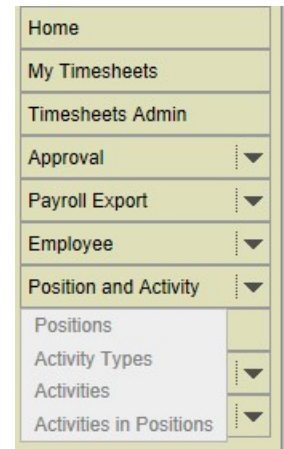
## Activities

Activities are actual events that the employee could enter on a timesheet as exceptions. Examples of activities could be Field Trip, Clean Up for Sporting Event, Driving for Sporting Event and etc...

When an activity is created it can be put under specific Activity Types.

To create an activity.

1. Click on Position and Activity
2. Click on Activities
3. Click Create



Activities

Activity Type : After School Event

Activity	Is Exception?	TS Comment Required	TS Worksite Required	Is Default?	Is External Record?
✏ Sporting Event	Yes	Yes	Yes	Yes	No

Activity Type : KIOSK Activity Type

Activity	Is Exception?	TS Comment Required	TS Worksite Required	Is Default?	Is External Record?
✏ Exception	Yes	No	No	No	Yes
✏ Regular	No	No	No	Yes	Yes

Activity Type : KIOSK Leave Type

Activity	Is Exception?	TS Comment Required	TS Worksite Required	Is Default?	Is External Record?
✏ Calamity	No	No	No	No	Yes
✏ Compensatory Time	No	No	No	No	Yes
✏ Dock	No	No	No	No	Yes
✏ Holiday	No	No	No	No	Yes
✏ Jury Duty	No	No	No	No	Yes
✏ Military	No	No	No	No	Yes
✏ Other	No	No	No	No	Yes
✏ Personal Leave	No	No	No	No	Yes
✏ Professional	No	No	No	No	Yes
✏ Sick Leave	No	No	No	No	Yes
✏ Unknown	No	No	No	No	Yes
✏ Vacation Leave	No	No	No	No	Yes

1 - 15

- A. Enter the name of the Activity
  - B. Click on the drop down to select which Activity Type this activity is associated with
  - C. Click the drop down to select if this activity is an exception
  - D. Click the drop down to select if a comment is required
  - E. Click the drop down to select if a work site is required
  - F. Click the drop down to select if this activity is a default for a specific position
4. Click Create

Activity

Return Create

Name of the Activity  A

Activity Type After School Event B

Is this an Exception? No C

Comment on Work Activity Required on TS? No D

Work Site on work Activity required on TS? No E

Default work Activity for Position assigned to? No F

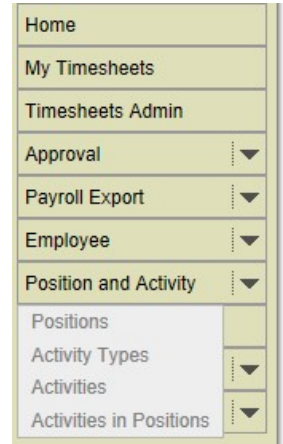
If you need to edit an Activity click on the pencil.

## Activities in Positions

Activities can be assigned to a specific position. When an employee in that position enters their timesheet they will see the activity as an option to enter.

To activities to positions:

1. Click on Position and Activity
2. Click on Activities in Positions
3. Click Create



Position Activities

Go Actions Create

Is Position Deactivated? = 'No'

Is Position Deactivated? = 'Yes'

Position

Part Time Position

Is Position Deactivated?

Activity Is External Record? = 'No'   A

Activity Is External Record? = 'Yes'

Is Exception? = 'No'

Is Exception? = 'Yes'

TS Worksite Required = 'Yes'

Default Activity = 'Yes'

TS Comment Required = 'No'

TS Comment Required = 'Yes'

TS Worksite Required = 'No'

Default Activity = 'No'

Position : Adult Education Director, Part Time Position : No, Is Position Deactivated? : No

Activity	Activity Type	Is Exception?	TS Comment Required	TS Worksite Required	Default Activity	Activity Is External Record?
Exception	KIOSK Activity Type	Yes	No	No	No	Yes
Regular	KIOSK Activity Type	No	No	No	Yes	Yes

- A. Click on the drop down to select which position the activity is associated with
- B. Click on the drop down to select which Activity is associated with this position
- C. Click the drop down to select if this activity is a default for a specific position
- D. Click the drop down to select if a work site is required on the Timesheet
- E. Click the drop down to select if a comment is required on the Timesheet

Position Activity

Return Create

Position  A

Activity  B

Default work Activity for this Position?  C

Work Site required on TS?  D

Comment on work Activity required on TS?  E

4. Click Create

If you need to edit an Activity click on the pencil.

## CONFIGURING SHIFTS

When creating shifts it is important to create a shift based on a time and not a position. For example. You cannot have 2 shifts for the same time so even though you may have a custodian and secretary that both work 7:30-3:30 you would not create 2 shifts you would have one shift for this time and assign positions to this shift.

To create shifts:

1. Click on Shifts
2. Click on Create

The screenshot shows a web application interface for managing shifts. On the right, a vertical navigation menu includes options like Home, My Timesheets, Timesheets Admin, Approval, Payroll Export, Employee, Position and Activity, Shifts (highlighted), Schedules, and Organization. The main content area is titled 'Shifts' and contains a search bar, 'Go', 'Actions', and 'Create' buttons. Below this is a table with the following data:

Name	Start Time	End Time	Lunch Time	Hours in Workday	Shift Span	Is Default?	Shift Name (Time) - Lunch	Employee Positions Assigned
Default Shift	08:00 AM	05:00 PM	1	8	9	Yes	Default Shift (08:00 AM - 05:00 PM) - 1.00 Hour Lunch	5

At the bottom right of the interface, it says '1 - 1'.

- A. Enter the name of the shift
- B. Click on the drop down to select the start time for the shift
- C. Click on the drop down to select the end time for the shift
- D. Enter a value for the lunch time. For example 1 would equal 1 hour and .5 would equal a half hour.
- E. Hours in the work day will automatically be calculated based on the start time, end time and lunch time.
- F. Click the drop down to select if this is the default for this position. You will have the opportunity to assign shifts to positions.

The screenshot shows the 'Shift' configuration form. It includes a 'Return' button and a 'Create' button. The form fields are:

- Name:** A text input field with a red callout letter 'A'.
- Shift Start Time:** A dropdown menu with 'Flexible' selected and a red callout letter 'B'.
- Shift End Time:** A dropdown menu with 'Flexible' selected and a red callout letter 'C'.
- Lunch Time:** A text input field with '0' and a red callout letter 'D'.
- Hours in Workday:** A text input field with a red callout letter 'E'.
- Is Default?:** A dropdown menu with 'No' selected and a red callout letter 'F'.

3. Click Create
4. Click on the positions/employees from the available list to assign to this shift
5. Once they are highlighted click the right arrow to move them to the Assigned list.
6. Click Assign Employee Positions.
7. Once the positions/employees have been assigned click Return.

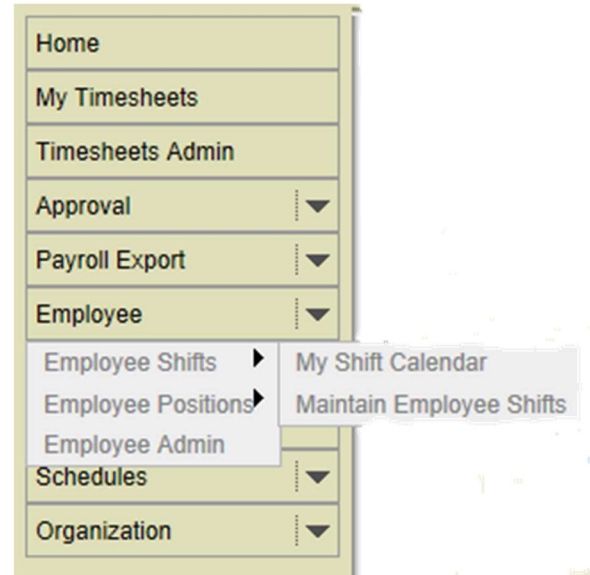
If you need to edit a shift click on the pencil.

## CONFIGURING EMPLOYEES

### Employee - Shifts

In Timesheet you can quickly view shifts and which employees are assigned to those shifts.

1. Click on Employee
2. Click on Employee Shifts
3. Click on Maintain Employee Shifts
4. Shifts will be displayed and which employee is assigned to that shift.



Employee Shift

Search:  Go Actions

Shift

Shift : **4 Hour Cook (4 hour workday), from 10:00 AM to 02:00 PM (4 hrs)**

Employee Last Name	Employee First Name	Position	Start Time	End Time	Shift Span	Hours in Workday
-	-	-	10:00 AM	02:00 PM	4	4

Shift : **Default Shift (8 hour workday), from 08:00 AM to 05:00 PM (9 hrs)**

Employee Last Name	Employee First Name	Position	Start Time	End Time	Shift Span	Hours in Workday
Byler	Susan	Tutor	08:00 AM	05:00 PM	9	8
Smith	Joy	Tutor	08:00 AM	05:00 PM	9	8
Harpster	Robin	Tutor	08:00 AM	05:00 PM	9	8
Hardwick	Angela	Tutor	08:00 AM	05:00 PM	9	8
Riei	Debra	Tutor	08:00 AM	05:00 PM	9	8

1 - 6

If you need to edit employees assigned to a shift click on the pencil.

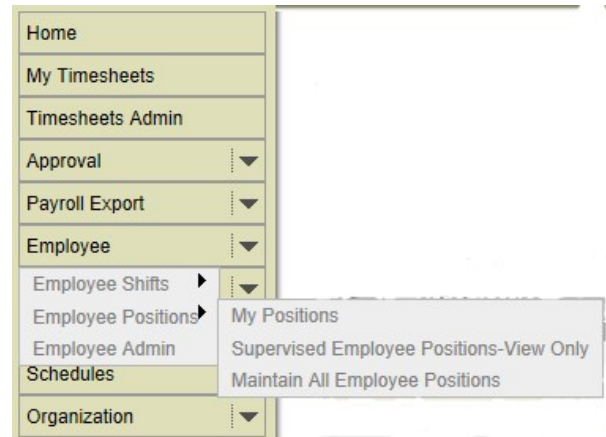
5. Click on the positions/employees from the available list to assign to this shift
6. Once they are highlighted click the right arrow to move them to the Assigned list.
7. Click Apply Changes.



## Employee - Positions

In Timesheet you can quickly view employees and which employees, what position the employee is assigned to, if the timesheet is required and way approval group they are associated with.

1. Click on Employee
2. Click on Employee Positions
3. Click on Maintain All Employee Positions



4. Employees will be displayed. Click on the pencil to edit the Employee's information.

Employee Positions

Go Reports Primary Report Actions Create

Kiosk User? = 'N'  
 Kiosk User? = 'Y'  
 Part Time Position = 'No'  
 Part Time Position = 'Yes'  
 Substitute Position = 'No'  
 Substitute Position = 'Yes'  
 Timesheet Required = 'No'  
 Timesheet Required = 'Yes'  
 Kiosk User?  
 Highlight Active  
 Highlight Terminated  
 Highlight On-Leave

Last Name	First Name	Position	Job Status	User Rights	Login User	Part Time Position	Substitute Position	Timesheet Required	Timesheet Auto Insert	Timesheet Review Group	Pay Period Schedule	Shift
Barr	Steven	Technology Coordinator	Active Date: 08/18/1998	Access to Own Timesheet	Active	No	No	Yes	No	Shelley Hilderbrand	Bi-Weekly Pay Period Extract Schedule	-
Byler	Susan	Tutor	Active	Access to Own Timesheet	Active	No	No	Yes	No	-	Bi-Weekly Pay Period Extract Schedule	Default Shift (08:00 AM - 05:00 PM)
Crist	Steven	Operations Supervisor	Active Date: 05/29/2008	Access to Own Timesheet	Active	No	No	Yes	No	Shelley Hilderbrand	Bi-Weekly Pay Period Extract Schedule	-
Hardwick	Angela	Tutor	Active	Access to Own Timesheet	Active	No	No	Yes	No	-	Bi-Weekly Pay Period Extract Schedule	Default Shift (08:00 AM - 05:00 PM)
Klenk	Robin	Treasurer	Active Date: 01/01/2003	Organization Administration	Active	No	No	Yes	No	Robin Klenk	Bi-Weekly Pay Period Extract Schedule	-
Riei	Debra	Tutor	Active	Access to Own Timesheet	Active	No	No	Yes	No	-	Bi-Weekly Pay Period Extract Schedule	Default Shift (08:00 AM - 05:00 PM)
Smith	Joy	Tutor	Active	Access to Own Timesheet	Active	No	No	Yes	No	-	Bi-Weekly Pay Period Extract Schedule	Default Shift (08:00 AM - 05:00 PM)

**NOTE:** When making changes to positions you will also need to make those same changes under Position and Activity > Positions. The questions that appear in both places are - Is this a Part Time Position, Is this a Substitute Position, Is Timesheet Completion Required, and Is Timesheet Completion Automated need.

**Employee Positions**

**Return** **Apply Changes**

Employee: Susan Byler (DOB:01/01/1900) Kiosk User? Yes **A**  
 Position: Tutor  
 Job Status: Active **B**  
 Hire Date: \_\_\_\_\_  
 Employee rights in this position: Access to Own Timesheet **C**  
 Position Supervisor: \_\_\_\_\_  
 Timesheet Entry Rounded to Nearest: No Restriction **D**  
 It this a Part Time Position?: No **E**  
 It this a Substitute Position?: No **F**  
 Is Timesheet Completion Required?: Yes **G**  
 Is Timesheet Completion Automated?: No (default) **H**  
Auto Insert function works for one or more shifts assigned to the employee as long as the shift start and end time is not "flexible". Auto Insert function will insert records daily from Monday to Friday, except for Holidays (see Holiday Menu).  
 Shift:
 

4 Hour Cook (4 hour workday) No Lunch <b>I</b>	Default Shift (8 hour workday) 1.00 Hour Lunch
--	--

  
 Timesheet Review Group:
 

Hilderbrand, Shelley (Superintendent) <b>J</b>	
Klenk, Robin (Treasurer)	
Tresey, Patricia (Director Student Services)	

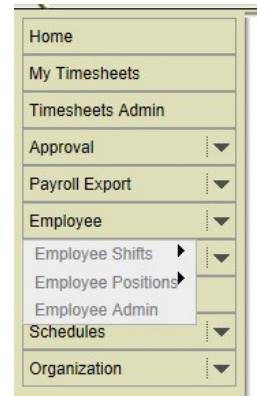
  
 Pay Period Schedule: Bi-Weekly Pay Period Extract Schedule **K**  
 Timesheet Submittal Schedule: Weekly Timesheet Submittal Schedule **L**

- A. The name will be grayed out and nothing can be entered in this box.
  - B. Select the job status of Active, On-Leave, Terminated, Deceased or Deleted
  - C. Select the employee's access to Timesheets:
    - Access to Own Timesheet
    - Can Extract Employee Timesheets to Payroll
    - Can See Employee Timesheets
    - Can See, Approve, Reopen or Reject Employee Timesheets (Supervisors will need this access)
    - Organization Administration
  - D. Select how the timesheet will be rounded.
  - E. Click on the drop down to select if this is a part time position.
  - F. Click on the drop down to select if this is a substitute position.
  - G. Click on the drop down to select if timesheet completion is required.
  - H. Click on the drop down to select if timesheet completion will be done automatically.
  - I. Verify employee has correct shift assigned
  - J. Verify the employee has correct staff selected for their timesheet review.
  - K. Select the Pay Period Schedule for this employee
  - L. Select the Timesheet Submittal Schedule
- Click Apply Changes if you made any changes.

## ***Employee - Admin***

In Timesheet you can quickly view employees information that has been loaded from Kiosk. The information cannot be edited, just viewed.

1. Click on Employee
2. Click on Employee Admin
3. Click on the pencil to view the employee's information.



## CONFIGURING APPROVALS

### ***Timesheet Automated Work Flow Definition***

Timesheet gives you the ability to set up approval work flows for timesheet approval.

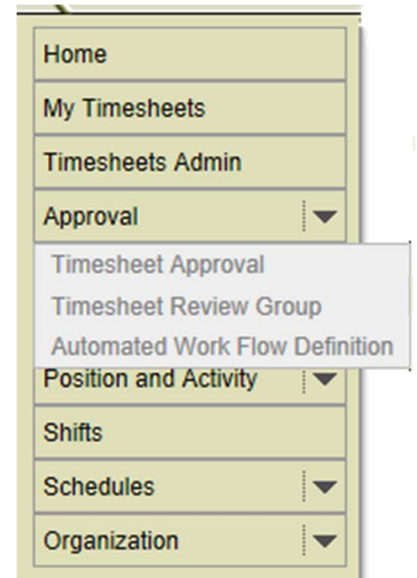
#### **Creating the Work Group**

1. Click on Approval
2. Click on Automated Work Flow Definition
3. Click on the Create New Approval Group
4. Enter a group name
5. Select if the Group Type is an And or Or

If you select AND that means if you put more than one person in this work group as an approver, Timesheet will require that both approvers take action on the request.

If you select OR as the type and you have more than one approver for the work group either approver can take action on the request.

6. Click Create Group
7. Click Add AWF Group Members



**AWF Group**

[Return to Automated Approval Work Flows](#) [Delete](#) [Apply Changes](#)

Organization 25 - Madison Local SD

Group Name

Group Type

**AWF Group Members**

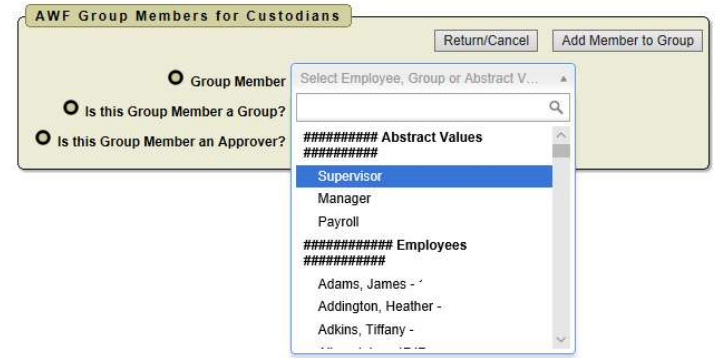
AWF Group has no MEMBERS assigned to it.

[Add AWF Group Members](#)

- A list of staff will be displayed. You can select the employee name that will be added to this group.

If you select Supervisor for the group member, Timesheet will look at the Supervisor field that was loaded into Timesheet from USPS. So the timesheet will go to the supervisor listed.

If you select Manager for the group member it will include any User within the District that is assigned to the "Leave Administrator" Role within Kiosk.



- Once you have selected the employee or supervisor, you will need to assign why type of member they are.

- No**  
This means the staff person is not an approver but is allowed to view the timesheet.
- No & Notify**  
This means that the staff person is not an approver but will be sent email notification when a timesheet needs approval.
- Yes**  
This means that the staff person is an approver and will be sent email notification when a timesheet is waiting for approval.



You must have a least one approver in the group before you can create a work group.

- Click Add Member to Group
- You can add additional group members by clicking on Add AWF Group Members and following the steps above.
- Once you have all your group members added click on Return to Automated Approval Work Flows.
- You will see your new group in the list of work groups.



## Creating the Work Flow

1. Once you have all your work groups created you can now create a New Flow.

Automated Approval Work Flow Definition														
Priority	AWF_ID	Edit It	Define It	See It	Automated Approval Name	EMPLOYEEID	KIOSK JOBNO	BUILDING IRN	BUILDINGCODE	DEPARTMENTCODE	PAYGROUP	APPOINTMENTTYPE	DAILYORHOURLY	Employees Matching
▼ ▲	1				Tutors	*	*	*	*	*	W:YY	*	*	<a href="#">VIEW</a>

Update Priority Sequence

Create New Automated Approval Work Flow Definition

2. Click on Create New Automated Approval Work Flow Definition

1. Select the priority sequence when creating the work flow. Knowing that work flows are processed top down in the list where do you want this work to be in that list.
2. Give your new work flow a name. For example if the flow is for the Custodians you may call it Custodians. Just make sure that whatever you name the work flow that it makes sense to you.
3. If this work flow is going to be for a specific employee click the drop down arrow to select that employee's name. If it is for a group of employees leave the \* for this field.

4. Enter a specific job number or use the \* for all jobs.
5. Click on a specific building IRN or use the \* for all buildings. You can hold the ctrl key down to select multiple buildings.
6. Click on a specific building code or use the \* for all buildings. You can hold the ctrl key down to select multiple buildings.

Return/Cancel    Create

**Create/Edit Automated Approval Work Flow**

AWF Priority Seq  A

AWF Name  B

EMPLOYEEID  C

KIOSK\_JOBNO  D

BUILDING\_IRN  E

BUILDINGCODE  F

DEPARTMENTCODE  G

PAYGROUP  H

APPOINTMENTTYPE  I

DAILYORHOURLY  J

Deleted Date \_\_\_\_\_

Created By \_\_\_\_\_

Last Updated By \_\_\_\_\_

7. Click on a specific department code or use the \* for all departments. You can hold the ctrl key down to select multiple departments.
8. Click on a specific pay group or use the \* for all pay groups. You can hold the ctrl key down to select multiple pay groups.
9. Click on a specific appointment type or use the \* for all appointment types.
10. Click on a daily or hourly or use the \* for all types.

3. Click Create.

Once you have created the work flow you will need to define it. Define it means that you are going to add work groups to this flow. Click on the pencil icon.

Automated Approval Work Flow Definition

Create New Automated Approval Work Flow Definition

Priority	AWF_ID	Edit It	Define It	See It	Automated Approval Name	EMPLOYEEID	KIOSK JOBNO	BUILDING IRN	BUILDINGCODE	DEPARTMENTCODE	PAYGROUP	APPOINTMENTTYPE	DAILYORHOURLY	Employees Matching
▼ ▲	1				Tutors	*	*	*	*	*	W:YY	*	*	<a href="#">VIEW</a>
▼ ▲	2				Not Defined	Custodians	*	*	*	000	*	*	*	<a href="#">VIEW</a>

Update Priority Sequence

1. Click Add Next Level.

Define LEVEL(s) of the Work Flow: Custodians

[Return to Automated Approval Work Flows](#) [Add Next Level](#)

Click **Add Next Level** Button to Add 1st level of the Approval Work Flow.

[Save re-ordering of AWF Level\(s\)](#)

2. Click on the Group ID drop down menu and select the group that will be the first approvers in this work flow.

Assign GROUP to the Flow Level

[Cancel/Return](#) [Add Level](#)

AWF Level 1

Group Id

Select an Approval Group

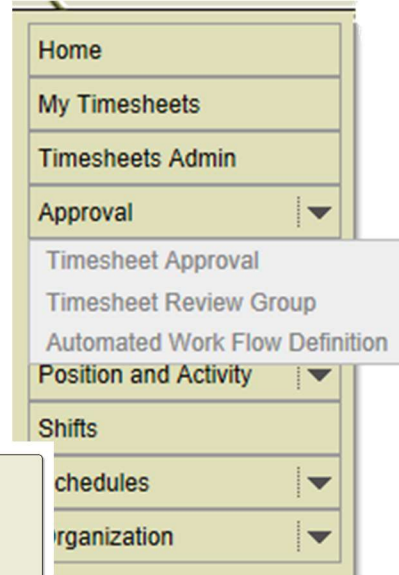
- Custodians
- Tutors

3. Click Add Level.
4. Repeat the process again by clicking Add Level for each level of approval that you need for this flow.
5. Once you have the flow completed click Return to Automated Approval Work Flows.
6. You will see your flow and how you defined it. More specific flows need to be at the top.
7. Click on View under Employees Matching to see which employees will follow this flow.

## Timesheet Review Group

This will give you an overview of each Reviewer and what access they have with Timesheets.

1. Click on Approval
2. Click on Timesheet Review Group
3. Reviewers will be listed with their access and the employees who timesheet the review can see.



Timesheet Review Group

Reviewer : **(Superintendent)**, Reviewer Rights : Can See, Approve, Reopen or Reject Employee Timesheets

Last Name	First Name	Position	Timesheet Schedule	Payperiod Schedule	Shift
		Technology Coordinator	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Caf Supervisor	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Transportation Director	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Operations Supervisor	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Meeting Expenses	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Superintendent	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Principal 7/8 Middle School	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		High School Principal	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Adult Education Director	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Associates Principal 5/6 Grades	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Director Of Career Technical Education	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Elementary Principal	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Elementary Principal	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Director Student Services	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-
		Elementary Principal	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-

Reviewer : **(Treasurer)**, Reviewer Rights : Organization Administration

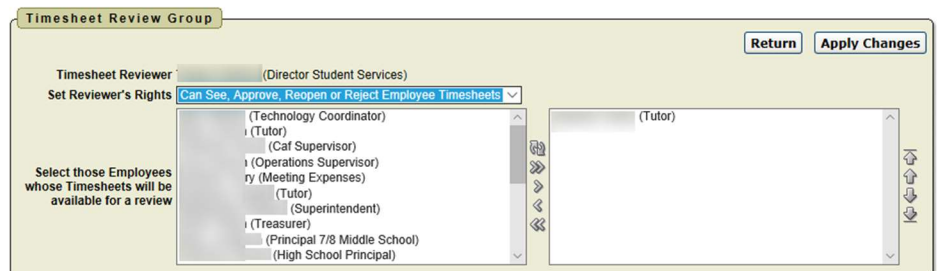
Last Name	First Name	Position	Timesheet Schedule	Payperiod Schedule	Shift
		Treasurer	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	-

Reviewer : **(Director Student Services)**, Reviewer Rights : Can See, Approve, Reopen or Reject Employee Timesheets

Last Name	First Name	Position	Timesheet Schedule	Payperiod Schedule	Shift
		Tutor	Weekly Timesheet Submittal Schedule	Bi-Weekly Pay Period Extract Schedule	Default Shift (08:00 AM - 05:00 PM)

1 - 17

4. When you click on the pencil icon you can select which employees the reviewer has access too.
5. Click the drop down to select their access rights.
  - Can extract Employee Timesheets to Payroll
  - Can See Employee Timesheets
  - Can See, Approve, Reopen or Reject Employee Timesheets
  - Organization Administrator
6. Select the staff on the left that the reviewer has access for timesheets.
7. Click the right arrow to move the staff to the box on the right.
8. Click Apply Changes

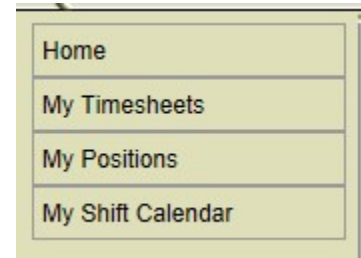




## TIMESHEET SUBMITTAL

The employee can view timesheets that need to be completed.

1. Click on My Timesheets
2. The employee will see timesheets that have been submitted, current and future.
3. To enter data onto a timesheet click on TS Details.



**My Timesheets**

Search:  Go Actions

Position  
 TS Period = 'CURRENT'  
 TS Period = 'PAST'  
 TS Period = 'FUTURE'

Position : Tutor

TS Detail	View Status Hierarchy	TS Status	TS Period	PP End Date	TS Start Date	TS End Date	Earliest Entry	Latest Entry	Total Hrs Reported	Total Hrs Lunch	Total Reg Hrs	Total Excpn Hrs	Is TS Required?
TS Details	-	Future	FUTURE	07/20/2018	07/14/2018	07/20/2018	-	-	-	-	-	-	No
TS Details	-	Current	FUTURE	07/20/2018	07/07/2018	07/13/2018	-	-	-	-	-	-	No
TS Details	-	Late	CURRENT	07/06/2018	06/30/2018	07/06/2018	-	-	-	-	-	-	No

1 - 3

Any leave requests that have been entered into Kiosk will flow over to the timesheet. Any holidays that have been created on the Holiday Schedule will display on the timesheet also.

If you have selected for the timesheet to be auto completed the data will be already completed for the employee.

If the employee needs to enter additional timesheet data or the employee needs to enter data because the timesheet is not auto completed, the employee will click on New Entry.

Timesheet for [Redacted], Tutor Return Print Details

Timesheet Period from 07/07/2018 until 07/13/2018 | Status: Current

Pay Period from 07/07/2018 until 07/20/2018

Hours: 0 | Regular: 0 | Exception: 0 | OT/CT: 0

<< Previous Current Timesheet Next >> New Entry Submit Timesheet - Step 1

**July 2018**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21

Search:  Go Actions

Activity = 'Exception'  
 Workday

No data found.

- A. The employee will pick the activity based on the activities that were created by the Timesheet Administrator
- B. The default shift will display for the employee
- C. Click the calendar to select the date for time worked
- D. When you click in the start time box you will be prompted to select the time and click done.
- E. When you click in the end time box you will be prompted to select the time and click done.
- F. Click the drop down to select Yes or No if lunch is included.
- G. Enter the Work Site. This can be customized as to whether or not the employee has to enter the site.
- H. Enter the Zip. This can be customized as to whether or not the employee has to enter the site.
- I. Employee can enter comments.

The screenshot shows a 'Timesheet Entry' form. At the top right are 'Return' and 'Create' buttons. The form contains the following fields and controls:

- Activity:** A dropdown menu set to 'Regular' (labeled A).
- Shift:** A dropdown menu set to 'Default Shift (08:00 AM - 05:00 PM) - 1.00 Hour Lunch' (labeled B).
- Timesheet Entry Rounded to Nearest:** A dropdown menu set to 'No Restriction'.
- Date:** A text input field with a calendar icon (labeled C).
- Start Time:** A text input field set to '08:00 AM' (labeled D).
- End Time:** A text input field set to '05:00 PM' (labeled E).
- Include Lunch Time?:** A dropdown menu set to 'Yes' (labeled F).
- Lunch Time:** A text input field.
- Reg Hours:** A text input field.
- It this a Substitute Position?:** A dropdown menu set to 'No'.
- Is Worksite required for TS?:** A dropdown menu set to 'No' (labeled G).
- Work Site:** A text input field (labeled H).
- Zip:** A text input field (labeled I).
- Is a Comment required for TS?:** A dropdown menu set to 'No'.
- Comment:** A large text area for entering comments.

- 1. Click Create when entry is completed. The new entry will display on the time sheet.
- 2. Once the entries are complete and the timesheet is ready to submit for approval the employee will click on Submit Timesheet – Step 1

The screenshot shows a 'Timesheet for [redacted] Operations Supervisor'. It includes a 'Return' and 'Print Details' button. The timesheet period is from 06/30/2018 to 07/06/2018, with a status of 'Open'. The pay period is from 06/23/2018 to 07/06/2018. Summary statistics show: Hours: 32 | Regular: 32 | Exception: 0 | OT/CT: 0. Navigation buttons include '<< Previous', 'Current Timesheet', 'Next >>', 'New Entry', and 'Submit Timesheet - Step 1'.

June 2018 - July 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	01 07:00 AM-02:30 PM, Vacation Leave (8.00)	02 07:00 AM-02:30 PM, Vacation Leave (8.00)	03 Independence Day	04 08:00 AM-05:00 PM, Regular (8.00)	05	06

At the bottom, there are search and action buttons, and a legend for 'Activity = Exception' (checked) and 'Workday' (unchecked). The text 'No data found.' is displayed at the bottom right.

- The employee has one more opportunity to review the timesheet and if the timesheet is ready to submit can click on Submit Timesheet. If the employee clicks Cancel Submission they will be able to go back to the entry screen to add more entries.

Review/Confirm Timesheet and click "Submit Timesheet" button. Otherwise, click "Cancel Submission".

**Timesheet for Steven Crist, Operations Supervisor**

Timesheet Period from 06/30/2018 until 07/06/2018 | Status: Open

Pay Period from 06/23/2018 until 07/06/2018

Hours: 32 | Regular: 32 | Exception: 0 | OT/CT: 0

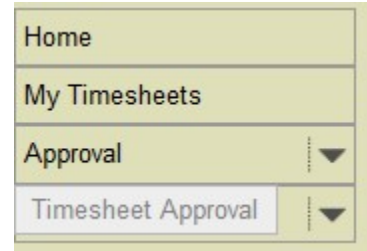
**June 2018 - July 2018**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30						30
01	02	03	04	05	06	07
	07:00 AM-02:30 PM, Vacation Leave (8.00)	07:00 AM-02:30 PM, Vacation Leave (8.00)	Independence Day <small>08:00 AM-05:00 PM, Holiday (8.00)</small>	08:00 AM-05:00 PM, Regular (8.00)		
08	09	10	11	12	13	14

## TIMESHEET APPROVAL

The approver will be notified via email that timesheets are waiting approval.

1. Click on drop down arrow next to approval and click Timesheet Approval.



At a quick glance the approver can see the timesheet start and end date, regular and overtime hours.

2. The approver has the option to view details of the timesheet by clicking on the Details button.
3. The approver can click Approve, Decline, or Re-open.
4. Re-open will allow the supervisor to send the timesheet back to the employee for editing. The employee can make changes and submit the timesheet again for approval.

Timesheet Approval

Go Actions Approve All

Exception Hours present    
 No Exception Hours

Approve All	Action	Approval Comment	View Status Hierarchy	Last Name	First Name	Position	TS Status	TS Start Date	TS End Date	PP Start Date	PP End Date	Reg Hrs	Total OT Hrs	Total CT Hrs	Total OI/CI Hrs	Total Hrs - Lunch	Excpn Hrs
<input type="checkbox"/>	<a href="#">Details</a>	-	<a href="#">H</a>			Technology Coordinator	Exported	06/30/2018	07/06/2018	06/23/2018	07/06/2018	24	0	0	0	24	0
<input type="checkbox"/>	<a href="#">Details</a>	<a href="#">Approve</a>   <a href="#">Decline</a>   <a href="#">Re-Open</a>	<a href="#">H</a>			Operations Supervisor	Submitted	06/30/2018	07/06/2018	06/23/2018	07/06/2018	32	0	0	0	29	0

1 - 2

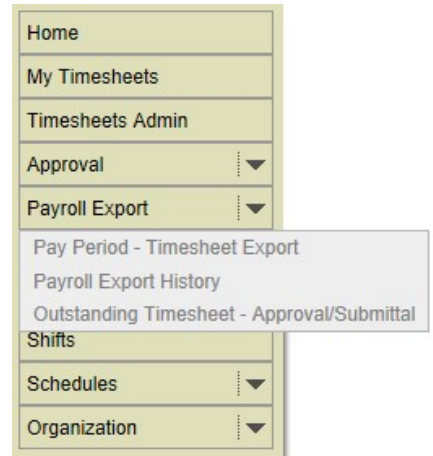
Timesheets can be mass approved by the supervisor as long as there are no overtime hours on the timesheet. If overtime hours do exist on the timesheet the supervisor will need to click on Details to approve the timesheet.

Clicking on the box next to the employee's timesheet will allow supervisor to mass approve timesheets. Once the box has been checked the approver needs to click on Approve All to complete the approval process.

## PAYROLL EXPORT

After all approvals are done the timesheets can be exported for input into USPS.

1. Click on Payroll Export
2. Click on Pay Period – Timesheet Export
3. A list of approved timesheets will display on the screen.
4. You can check the box to Export Only Exceptions.



Export Timesheets for Payroll

Pay Period: 07/06/2018  Export only exceptions?

Go

Total OT Hours != 0     
 Total OT Hours not like %<br>0%     
 Total OT Hours not like 0<br>%

Export All	Action	Last Name	First Name	Pay Period End Date	TimeSheet Status(es)	Total Hours Reported	Total Hours - Lunch	Total Reg. Hours	Total Exc. Hours	Total OT Hours	Total CI Hours	Total OT/CI Hours	Earliest Entry	Latest Entry	Click Position(s) link to View TS Details
<input type="checkbox"/>	-			07/06/2018	06/30/2018-07/06/2018 => APPROVAL	13	12	12	0	0	0	0	07/03/2018 08:00 AM	07/04/2018 05:00 PM	Tutor
<input checked="" type="checkbox"/>	<a href="#">Export Payroll</a>			07/06/2018	06/30/2018-07/06/2018 => APPROVED	24	24	24	0	0	0	0	07/02/2018 07:00 AM	07/04/2018 03:00 PM	Technology Coordinator
<input type="checkbox"/>	-			07/06/2018	06/30/2018-07/06/2018 => OPEN	24	21	24	0	0	0	0	07/02/2018 07:00 AM	07/04/2018 05:00 PM	Operations Supervisor

1 - 3

5. To export the timesheets check the box next to the employee's name
6. Click on Export All
7. You will receive a box asking if you want to save or open the file. It is recommended that you save the file for import into USPS.

To review exports:

1. Click on Payroll Export History
2. You can view details of the export or click Export again to save the export file.

Payroll Timesheet Export History

Export only exceptions?

Go

Export Again	Exported Timestamp	Exported By Email	Last Exported Timestamp	Last Exported By Email	Number Timesheets Exported	Export Control Number
<a href="#">Details</a>	<a href="#">Export</a>				1	095647346

1 - 1

