

# Welcome!

## ISA Self-Service Timekeeper/Approver Training

### **Introduction/Overview**

- Lori Serna/Payroll – Functional/Project Lead

### **ISA Hire Documentation**

- Carol Sammons/Academic Personnel -  
Documentation Analyst

### **ISA Self-Service Approval Process**

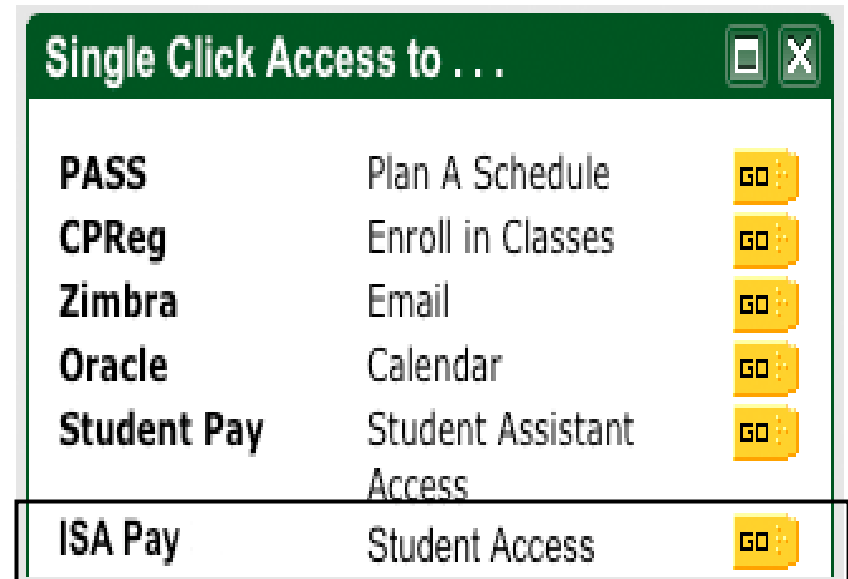
- Lisa West/Payroll – ISA Lead Payroll Technician

# Introduction/Overview

- Beginning with the April 2009 pay period, ISA's will enter time online instead of submitting a paper timesheet
- This time can then be approved online by the department approver throughout the pay period, but must be completed by the final day to approve. The ISA entry and approval deadlines are listed on the Payroll Calendar.
- Spring Quarter begins on 3/30, however this date is part of the March pay period and will be submitted on the March paper timesheet. Online entry will start with April 1<sup>st</sup>

# Introduction/Overview

- ISA Employees will access their timesheets on the My Cal Poly portal's "Main" page using a single click access button
- This timesheet is completely separate from the Student Pay System. The ISA's will be using the timesheet within PeopleSoft, not a customized front end like SPS



# Introduction/Overview

- Once the time has been approved, Payroll will validate and process the hours, create a file from PeopleSoft and electronically transmit this file for payment to the State Controller's Office
- Any time that is not reported during the reporting or approval periods each month will need to be submitted on a paper "Late ISA Timesheet"
- Late ISA timesheets are due to Payroll by the 10<sup>th</sup> of the month to be paid on or about the 25<sup>th</sup> of the month (late ISA payday)

# Introduction/Overview

- ISA's have the same pay periods as faculty/staff. They are still paid on hourly pay day, on or about the 10<sup>th</sup> of the month
- ISA's pick up their checks in Student Accounts, Admin Bldg Room 211
- Payroll has added a page on the Payroll Website for ISA's and ISA Approvers. This page contains forms and information pertaining to ISA self-service and pay:

[http://www.afd.calpoly.edu/payroll/isa\\_selfservice.asp](http://www.afd.calpoly.edu/payroll/isa_selfservice.asp)

# ISA Approver - Security

- Security to approve ISA hours worked will be granted using the COMPACCT request form, new role added “ISA Approver”
- Dynamic group security will be utilized to group ISA’s for approval
- Department IDs are mapped to dynamic groups. ISA dynamic groups will all begin with a “7”. This is the DeptID used to hire them on the ISA-101 and then entered into Job
- Multiple DeptID’s can be mapped to a single dynamic group for approval

# ISA Employee - Security

ISA employee's will have timesheet access once the following has been completed:

- ISA has been hired in Job Data
- Job refresh has been run to apply all the necessary enrollments. This is run nightly, except during upgrades

If it has been more than a week since the ISA has been working and they do not have access yet, verify that the following has been completed prior to calling AP or Payroll:

1. ISA-101 hire documents have been sent to Academic Personnel (AP suggests sending forms by student courier and not through campus mail to expedite the process)
2. If the ISA is new, have they completed a new hire orientation with Payroll?
3. Is their Job row in PeopleSoft yet for your department? (Review Job Information; if you do not have access please check with your Dept. Coordinator)

# Definition of Terms

- **Reported Time** – This is time entered into the timesheet and submitted. There are two types of reported time: unapproved and approved. When an ISA enters hours and hits “submit” on their timesheet, this is now unapproved reported time. Once the approver goes in and approves, the status is changed to approved reported time. Only **approved reported time** can be picked up by Payroll to process.

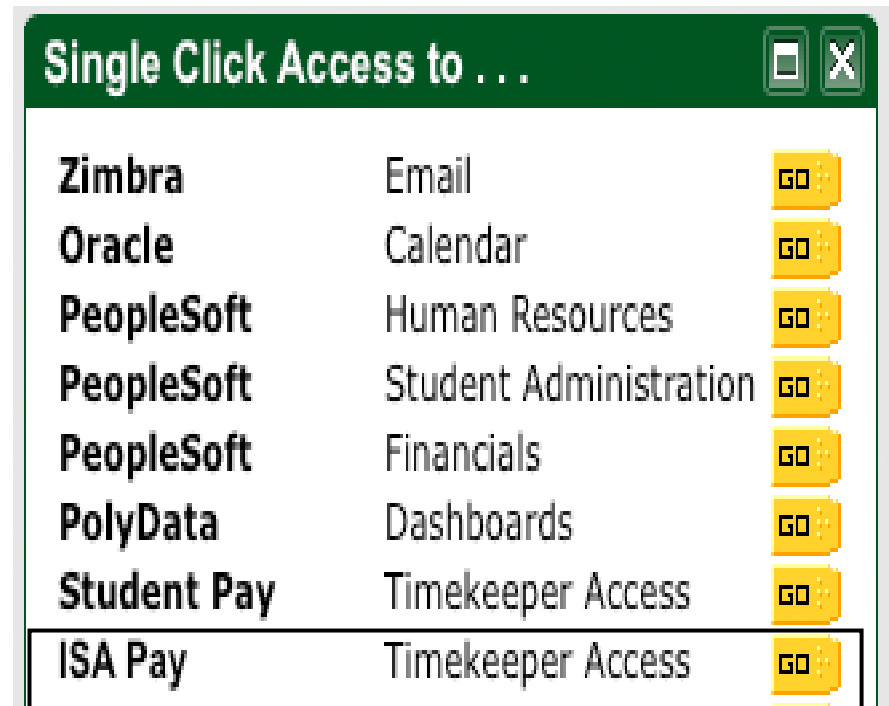


# Definition of Terms

- **Payable Time** – Payable time is created when Payroll runs a processing job called Time Administration. This finds all approved reported time and processes it. This approved reported time is now unapproved payable time. Payroll will make sure all time has been processed and pulled over correctly. We will then batch approve all processed time. Only approved payable time will be pulled into the file that will ultimately be transmitted to the State Controller's Office for pay to issue.

# Where do I go to approve?

- There will be a “Single Click Access to...” button on the Main tab of the My Cal Poly portal once you have logged in. This GO button will take you directly to the “Approve Reported Time” selection page.



# Where do I go to approve?

- Menu navigation will also become available within the Human Resources module once the ISA Approver role is assigned:
- ❖ Manager Self-Service>Time Management>Approve Time and Exceptions>Reported Time

Approve Reported Time

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**Timesheet Summary**

Employee Selection Criteria	
Description	Value
Group ID	<input type="text"/>
EmplID	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Workgroup	<input type="text"/>

Show Schedule Information

View By:  Date:   [<< Previous Week](#) [Next Week >>](#)

Employees For Lori Serna, Time Needing Approval From 02/14/2009 - 02/20/2009								
Select	Name	Job Description	Hours to be Approved	Reported Hours	Scheduled Hours	Exception	Approved/Submitted Hours	Denied Hours
<input type="checkbox"/>	Name		0.000000	0.000000	0.000000		0.000000	0.000000

Select All  Clear All

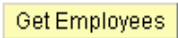
# Approve ISA reported time during the approval period

## Processing Steps

1. Enter EmplID or Group ID. (Group ID means the ISA dynamic group ID) OR you can just enter the “Workgroup” HRLY R11. All ISA Employees that you have security to approve will be returned.
2. Specify the pay period you are approving for:

**View By** = All time before

**Date** = first day of the following pay period for which you are approving for. This example shows “5/1/09” which would be for approving the April pay period.

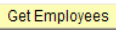
Click 

Approve Reported Time

### Timesheet Summary

Employee Selection Criteria

Description	Value
Group ID	<input type="text"/>
EmplID	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Workgroup	HRLY R11



Show Schedule Information

View By: All Time Before  Date: 05/01/2009

Select	Name	Job Description	Hours to be Approved	Employee ID	Empl Rcd Nbr	Job	Department	Department Description
<input type="checkbox"/>	Name		0.000000		0			

Select All  Clear All

# Approve ISA reported time during the approval period

- All selected employees that **have time waiting to be approved** will now show on the bottom of the page. At this point you can view the summary of hours to be approved, and if you need no further details, you can click the “Select All” or select each student individually. Then click: [Approve Selected](#)
- If you wish to view, change, or delete punch time entries made by the ISA, click on the ISA’s blue hyperlink name for further detail

## Approve Reported Time

### Timesheet Summary

Employee Selection Criteria	
Description	Value
Group ID	<input type="text"/>
EmplID	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Workgroup	<input type="text"/>

[Get Employees](#)

Show Schedule Information

View By:  Date:  [Refresh](#) [<< Previous Week](#) [Next Week >>](#)

Employees For Lori Serna, Time Needing Approval From 02/14/2009 - 02/20/2009									
Select	Name	Job Description	Hours to be Approved	Reported Hours	Scheduled Hours	Exception	Approved/Submitted Hours	Denied Hours	
<input type="checkbox"/>	<a href="#">Name</a>		0.000000	0.000000	0.000000		0.000000	0.000000	

[Select All](#)  [Clear All](#)

[Approve Selected](#)

[Deny Selected](#)

# Approve ISA reported time during the approval period

- The selected employee will now show on the timesheet.
- The data is presented on the timesheet with the approval at the bottom of the page.
- In this manner, time can be altered and/or approved by the approver as necessary. This looks exactly like the student's timesheet view, except with the approval controls added at the bottom.

Home | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Net](#)

### Timesheet

Alberto Reynoso  
Job Title: Instructional Studnt Asst

EmpID: 002393972  
Empl Rcd Nbr: 0

[Click for Instructions](#)

View By:  Date: 11/03/2008 [Refresh](#) [<< Previous Week](#) [Next Week >>](#)

Reported Hours: 20.00 Hours Scheduled Hours: 0.00 Hours [Show all Punch Types](#)

From 11/03/2008 to 11/09/2008

Select	Day	Date	Status	In	Out	In	Out	In	Out	In	Out	In	Out
<input type="checkbox"/>	Mon	11/3	Approved	8:00:00AM	12:00:00PM								
<input type="checkbox"/>	Tue	11/4	Approved	8:00:00AM	12:00:00PM								
<input type="checkbox"/>	Wed	11/5	Approved	8:00:00AM	10:00:00AM	1:00:00PM	3:00:00PM						
<input type="checkbox"/>	Thu	11/6	Approved	8:00:00AM	12:00:00PM								
<input type="checkbox"/>	Fri	11/7	Approved	3:00:00PM	5:00:00PM								
<input type="checkbox"/>			Needs Approval			6:00:00PM	8:00:00PM						
<input type="checkbox"/>	Sat	11/8	New										
<input type="checkbox"/>	Sun	11/9	New										

[Select All](#) [Deselect All](#) [Approve Selected](#) [Deny Selected](#)

[Submit](#) [Clear](#)

[Reported Hours Summary - click to view](#)

# Approve ISA reported time during the approval period

1. Validate the record number is correct (i.e. is it an academic break position? Is it an academic year position? Do they have multiple positions? Refer to the returned Employee's ISA 101 for correct record numbers EACH quarter/AY)
2. Validate the days and times worked. Is this correct? Is there any overlapping time? Are the AM and PM used correctly?
3. Validate all weeks that are included in an approval period. See the Payroll Calendar for beginning and end dates for each pay period

The screenshot shows a web-based Timesheet application. At the top, there are navigation links: Home, Add to Favorites, and Logout. Below that, there are links for New Window, Help, and Customize Page. The main heading is "Timesheet".

Employee Information:  
Name: Alberto Reynoso  
Job Title: Instructional Student Asst  
EmpID: 002393972  
Emp Rcd Nbr: 0

Controls:  
Click for instructions  
View By: Week (dropdown)  
Date: 11/03/2008 (calendar icon) Patch (button)  
Navigation: << Previous Week, Next Week >>  
Summary: Reported Hours: 20.00 Hours, Scheduled Hours: 0.00 Hours, Show all Punch Types (link)

Table: From 11/03/2008 to 11/09/2008

Select	Day	Date	Status	In	Out	In	Out	In	Out	In	Out	In	Out
<input type="checkbox"/>	Mon	11/3	Approved	8:00:00AM	12:00:00PM								
<input type="checkbox"/>	Tue	11/4	Approved	8:00:00AM	12:00:00PM								
<input type="checkbox"/>	Wed	11/5	Approved	8:00:00AM	10:00:00AM	1:00:00PM	3:00:00PM						
<input type="checkbox"/>	Thu	11/6	Approved	8:00:00AM	12:00:00PM								
<input type="checkbox"/>	Fri	11/7	Approved	3:00:00PM	5:00:00PM								
<input type="checkbox"/>			Needs Approval			6:00:00PM	8:00:00PM						
<input type="checkbox"/>	Sat	11/8	New										
<input type="checkbox"/>	Sun	11/9	New										

Buttons: Select All, Deselect All, Approve Selected, Deny Selected, Submit, Clear

Footer: Reported Hours Summary - click to view





# How to report time: ISA missed the entry period, but it's still during the approval period

A timesheet will need to be created by the approver/timekeeper if the ISA completely missed the entry period, but it is still during the approval period. You will not be able to access their timesheet in "Approved Reported Time". You will need to create a timesheet for them:

1. Enter the EmplID or Group ID to find the ISA you need to enter time for
2. Select View By: Week or Day
3. Date: Enter the first day of the week or the date you need to report time for
4. Click [Get Employees](#)
5. Select from the ISA return results the employee you need to report time for by clicking on their [Name](#)

Report Time

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Timesheet Summary

[Get Employees](#)

Employee Selection Criteria	
Description	Value
Group ID	<input type="text"/>
EmplID	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Workgroup	<input type="text"/>

Show Schedule Information

View By:  Date:  [Refresh](#) [<< Previous Week](#) [Next Week >>](#)

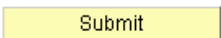
Employees For Lori Serna, Totals From 02/14/2009 - 02/20/2009

Name	Job Description	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Approved/Submitted Hours	Denied Hours	Employee ID	Empl Rcd Nbr
Name		0.000000	0.000000	0.000000		0.000000	0.000000		0

## Navigation:

**Manager Self-Service>Report Time>Timesheet**

# How to report time: ISA missed the entry period, but it's still during the approval period

- Enter the time in and out for each day/period you are reporting for. You must enter the "AM" and the "PM" since this is similar to punching in and out on a time clock. Then click 

## For example:

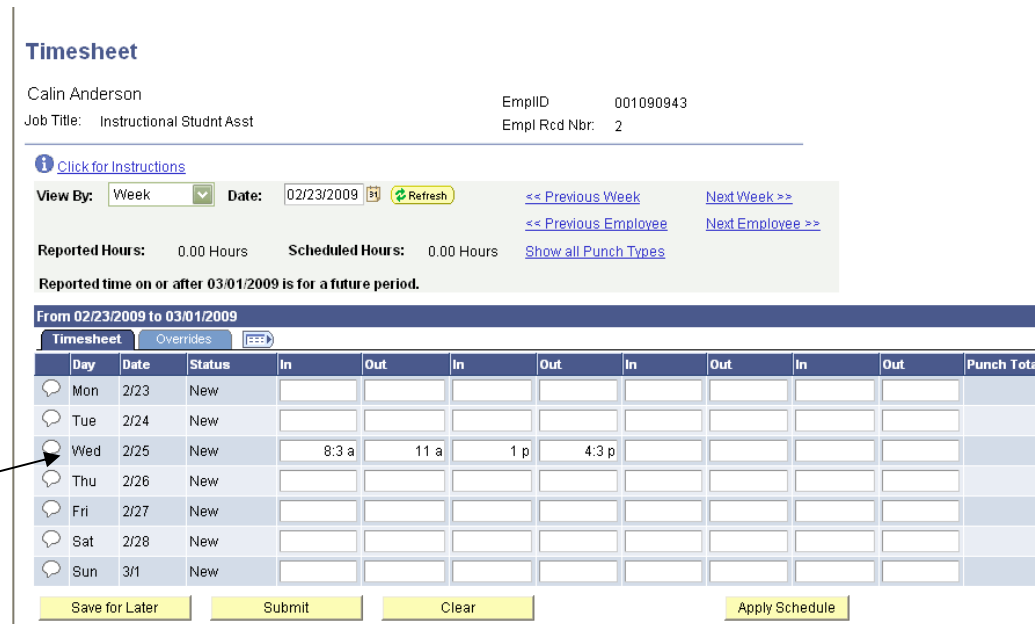
An ISA worked on Wed 2/25 from 8:30 a.m. to 11:00 a.m. then again from 1:00 p.m. to 4:30 p.m. On the row representing the day in the timesheet, you would key:

In: 8:3 a

Out: 11 a

In: 1 p

Out: 4:3 p



**Timesheet**

Calin Anderson  
Job Title: Instructional Student Asst  
EmpID: 001090943  
Empl Rcd Nbr: 2

[Click for Instructions](#)

View By: Week Date: 02/23/2009 Refresh << Previous Week Next Week >>  
<< Previous Employee Next Employee >>  
Show all Punch Types

Reported Hours: 0.00 Hours Scheduled Hours: 0.00 Hours  
Reported time on or after 03/01/2009 is for a future period.

From 02/23/2009 to 03/01/2009

Day	Date	Status	In	Out	In	Out	In	Out	In	Out	Punch Total
Mon	2/23	New									
Tue	2/24	New									
Wed	2/25	New	8:3 a	11 a	1 p	4:3 p					
Thu	2/26	New									
Fri	2/27	New									
Sat	2/28	New									
Sun	3/1	New									

Save for Later Submit Clear Apply Schedule

# How to report time: ISA missed the entry period, but it's still during the approval period

- Once you have created the timesheet, entered hours and hit submit, return to “Approved Reported Time” to view and approve the time you just entered.

You can either go back to the portal main tab and click your single click access button again or navigate through PSoft: Manager Self-Service>Approve Time and Exceptions>Reported

# How to Report Time: Missed the online entry and approval period

- If time worked in a month is not reported through the online entry and approval process, then the time needs to be submitted to Payroll on a “Late ISA Timesheet”. This form can be found on the Payroll Website at the following web address:

[http://www.afd.calpoly.edu/payroll/isa\\_selfservice.asp](http://www.afd.calpoly.edu/payroll/isa_selfservice.asp)


# Late ISA Timesheet

- The Late ISA Timesheet includes macros. Please “**enable**” macros when opening
- This form must be filled out in Excel, we cannot accept handwritten timesheets
- The format on the “Late ISA Timesheet” mimics how the ISA enters time in their online timesheet
- The ISA must submit one timesheet per PeopleSoft record number. If they have two different jobs in one department (ex: grader and instructor) each one represents a separate record number in PeopleSoft. Please consult the **ISA 101** forms returned to you from Academic Personnel or review Job Information. This will advise you which PeopleSoft record number corresponds to which job.

# Viewing Time Reported and Paid

- **Time and Labor Launch Pad** allows you to view which days in the specified month have reported punch time and processed payable time for your ISA employees.
- You can also click a link to drill down by day to view the details of the reported and payable time for the ISA employee.
- You can use the Employee Selection Criteria section to specify the filter by Employee, Group, Workgroup, etc.  
**\*This information is useful to validate time submitted by the employee, time paid in prior pay periods, etc.**

# Viewing Time Reported and Paid

1. Enter your search criteria for the Group or Employee you are viewing PLUS enter in the 'Workgroup' field 'HRLY R11' to narrow your search results by ISA Employees
2. Click on 

Time and Labor Launch Pad

Select Employee



Employee Selection Criteria	
Description	Value
Group ID	<input type="text"/>
EmplID	<input type="text"/>
Empl Rcd Nbr	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Workgroup	<input type="text"/>

Employees For Lori Serna

Name	Employee ID	Empl Rcd Nbr	Job Code	Job Description	Department ID	Business Unit
Name		0				

# Viewing Time Reported and Paid

3. Select the Employee you would like to view by clicking on their name.

Time and Labor Launch Pad  
Select Employee

Employee Selection Criteria	
Description	Value
Group ID	11900
EmplID	
Empl Rcd Nbr	
Last Name	
First Name	
Business Unit	
Workgroup	HRLY R11

Get Employees

Employees For Lori Serna

Name	Employee ID	Empl Rcd Nbr	Job Code	Job Description	Department ID	Business Unit	Department Description	Workgroup
	001090943	2	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	003383363	0	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	004109374	1	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	000048486	5	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	002487819	2	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	001443958	4	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	003835503	0	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11
	000609644	0	1150	Instructional Studnt Asst	119000	SLCMP	Acad Prgms-Writing Skills	HRLY R11



# Viewing Time Reported and Paid

4. Select the month you would like to view by using the drop down list

\*Please be aware that this page does not have the State pay periods built in. It will show you results by the Hallmark calendar month.

5. On this page, you can view the total number of hours entered for each day and the “status” of the time. These statuses are explained in the legend at the bottom of the page.

## Time and Labor Launch Pad

Anderson, Calin Matthew

Employee ID: 001090943

Job Title: Instructional Student Asst

Employee Record Number: 2

### Payable Hours

February 2009 02 - February 2009 Payable Hours View

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	4.00 <u>2</u> P\$	4.00 <u>3</u> P\$	4	5	4.00 <u>6</u> P\$	4.00 <u>7</u> P\$
8	4.00 <u>9</u> P\$	10	11	4.00 <u>12</u> P\$	13	14
8.00 <u>15</u> P\$	16	17.00 <u>17</u> P\$	18	19	20	21
22	<u>23</u> P	<u>24</u> P	<u>25</u> P	26	27	28

Forecast Payable Time

Previous Month

Next Month

[Return to Select Employee](#)

X	Exception
P	Reported Punched Time
E	Reported Elapsed Time
\$	Payable Time
F	Forecasted Payable Time
R	Recommended Action

# Viewing Time Reported and Paid

- In this example**, the ISA reported 4 hours worked on Monday, Feb 2nd and the status is **P\$** which means it was reported on a punch timesheet (P) by the ISA. It's also been approved by the approver **and** processed by Payroll (\$). On February 23rd however, this time has only been reported but not paid yet. If the approval period has already passed, this time may have been approved, but it was not picked up in the Payroll process.

## Time and Labor Launch Pad

Anderson, Calin Matthew

Employee ID: 001090943

Job Title: Instructional Studnt Asst

Employee Record Number: 2

### Payable Hours

February 2009

02 - February

2009

Payable Hours

View

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	4.00 2 P\$	4.00 3 P\$	4	5	4.00 6 P\$	4.00 7 P\$
8	4.00 9 P\$	10	11	4.00 12 P\$	13	14
8.00 15 P\$	16	17.00 17 P\$	18	19	20	21
22	23 P	24 P	25 P	26	27	28

Forecast Payable Time

Previous Month

Next Month

[Return to Select Employee](#)

X	Exception
p	Reported Punched Time
E	Reported Elapsed Time
\$	Payable Time
F	Forecasted Payable Time
R	Recommended Action

# Viewing Time Reported and Paid

6. If you would like to see further details about any days that have time reported, you can click on the day of the month (click on the number on the day, it is a link)

This daily detail page has information about the punch in and out times, and the status of the payable time.

\*Please note: The Forecast Payable Time button is not active since schedules are not tracked in PeopleSoft for ISA's

Employee ID: 001090943  
Employee Record Number: 2  
Job Title: Instructional Studnt Asst

Reported Elapsed Time		
Quantity	Type	Time Reporting Code

Reported Punch Time				
Punch Type	Punch Date Time	Time Zone	Quantity	Time Reporting Code
In	02/02/2009 8:00AM	PST	4.000000	
Out	02/02/2009 12:00PM	PST		

Exceptions				
Exception ID	Description	Status	Severity	Resolved by

Payable Time						
Quantity	Type	Time Reporting Code	Status	Estimated Gross	Distributed Amt	Diluted Amt
4.000000	Hours	REG	Approved - Goes to Payroll	52.000000		

Forecast Payable Time

Forecasted Payable Time			
Quantity	Type	Time Reporting Code	Estimated Gross

Recommended Actions	
Action Required	Description

Go to:

[Return to Calendar](#) [Return to Select Employee](#)