EUT Course 150 – Time and Labor

PeopleSoft Version 9.2

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Table of Contents

Time and Labor Core

Section 2 Approving and Managing Time

Lesson 1 - Approving and Managing Time

Super User Timesheet Overview

Section 2, Lesson 1 Exercises, Scenario 1 - Super User Timesheet Overview

Procedure

Step	Action
1.	Super Users can enter and or modify a timesheet for an employee or manager. They have the ability to run the Time Administration process that calculates time and adjusts leave balances. Since the Super User and Sick Leave Pool Administrator have the ability to add or adjust time they use a different timesheet called the Super User Timesheet. Time Administrators will have a similar time sheet but they have a limited number of transactions that they can perform.
2.	To view the Super User Timesheet, click the **Time and Labor** link.
3.	Click the **Texas Time** link.
4.	Click the **Super User Timesheet** link.
5.	The Super User Timesheet Search page displays. To look at an employee's timesheet, enter their Empl ID or use the Name fields to search for the employee.
6.	In this example, locate the employee by entering their full ID number. Enter the desired information into the **Empl ID** field. Enter "**00000000029**".

Step	Action
7.	The date field populates to the current month but can be changed as needed. Super Users have access to all periods of activity, unlike employees and managers that only have access to the timesheet for a defined period (ie 90 days). This timeframe is determined by each agency, so your agency may be slightly different. Super Users must be aware that balances prior to their Go-Live date must be corrected in the system of record (USPS) for that time, as well as CAPPS. Super Users should work with CAPPS and SHRPA Support Staff to correct these dates.
8.	Click the **Search** button.
9.	The Super User Timesheet displays. The entire timesheet may be too large to view on the monitor. Use the scrollbar to move across the page to view additional items on the timesheet. Click the scrollbar.
10.	These items will be reviewed later in the lesson. To scroll to the left to see the beginning of the timesheet, click the scrollbar.
11.	The timesheet header displays important information. Verify that the Name and Empl ID are correct for the information that was entered. Your security profile will determine the employees that you are able to view.
12.	The Leave Balances group box displays the leave balances for this employee. The leave balances always reflect the current amount of leave that the employee has accrued in each area. In this example, this employee has 87 hours of Annual leave. The employee has requested 8 hours of time off that is Pending Approval, leaving an Available balance of 79 hours. If the leave taken is not approved, it will remain in Pending Approval. Processes are in place to remind managers to approve their employee's time and leave, and Super Users must run queries to ensure Needs Approval time is managed appropriately.
13.	The next two group boxes, called grids, contain 31 sequential days where time is entered.

Step	Action
14.	The first grid displays the first 15 days beginning with the effective date entered on the Search page. In this example, the employee is an **Exception Time Reporte**r. The description line displays the employee's scheduled hours for each day. A **Positive Time Reporter**'s timesheet would display 0.00 in the description line for each day of the week because they do not have an assigned schedule.
15.	An Exception Time Reporter enters time on their timesheet when it is different from their assigned scheduled hours. This includes hours worked over their scheduled hours and any leave time taken during their scheduled hours. If no leave is taken the employee will only have to submit their time according to their agency's policies.
16.	A Positive Time Reporter must enter all hours that they work on the day that they work. They are also required to enter leave time and must submit their time as per their agency's deadlines in order to get paid.
17.	Time Reporting Codes are used to enter different types of time. For example Annual Leave and Sick Leave are just two types of time that can be entered on the timesheet.
18.	Only one Time Reporting Code (TRC) can be entered on a line. The Add a New Line button allows the Super User to add additional lines so different types of time can be added to the timesheet.
19.	TRCs can be typed directly into the field. They can also be selected from a list of available values. Click the **Look up Time Reporting Code (Alt+5)** button.
20.	This agency has 115 TRCs. Some agencies have agency specific TRC's. When your agency goes live on CAPPS the number of TRCs maybe different from other agencies.
21.	The TRCs will be reviewed in detail in the next lesson. Click the **Cancel** button.
22.	The Override Reason Codes (ORC) are agency specific and can be used by agencies to further define leave taken or hours worked. If your agency uses ORCs this information will be provided in the agency specific training materials.
23.	The Status field will be reviewed in a later lesson.
24.	To move across the page, click the scrollbar.

Step	Action
25.	The Labor Account Code field is used by some agencies to further define time allocated for special purposes. Agencies using Labor Account Codes will provide training on when and how to use this field. The FMLA ID is used to designate the FMLA Event number when an employee is out on FMLA. The comments field may be used by employees, managers, or Super Users.
26.	To move across the page, click the scrollbar.
27.	The Previous button will move the timesheet back 31 days at a time. Click the **Previous** button.
28.	Since there are only 28 days in February, this timesheet begins on 1/29/15.
29.	The Next button moves the timesheet forward 31 days. Click the **Next** button.
30.	To view additional detailed information about this employee's leave balances, click the **View Leave Balances** link.
31.	This employee has 12 different types of Leave Balances. Use the arrow buttons to navigate through the list or click View All to see all Leave Balances on one page.
32.	Click the **View All** link.
33.	To move down the page, click the scrollbar.
34.	This employee has no Administrative Leave available but does have Annual Leave Displayed.
35.	To continue further down the page, click the scrollbar.
36.	Some Leave time expires and the expiration dates can be seen in this view.
37.	Click the **Show Time Expiring in** list.

Step	Action
38.	The Show Time Expiring in drop down arrow allows different was to view the time. Click the **Next 90 Days** list item.
39.	Notice that the list changed to show only the time that expires in 90 days. To move up the page, click the scrollbar.
40.	Click the **View 1** link.
41.	Click the **Return to Employee Timesheet** link.
42.	Click the **Override Schedule** link.
43.	The Override Schedule Workday link allows the user to adjust the employee's work schedule for the current week. This will be explored in detail in a later lesson. Click the **Return To Timesheet** link.
44.	The Maintain Leave of Absence link allows Super Users to place an employee on Leave of Absence, Return an employee from Leave of Absence, or to change an LOA Reason Code. **Note**: The Maintain Leave of Absence link is available in Manager Self-Service for agencies that use Full Manager Self-Service.
45.	Click the **Home** link.
46.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Lesson 2 Timesheet Entries

Entering Time for Employees

Section 2, Lesson 2 Exercises, Scenario 1 - Entering Time for an Employee

Procedure

Step	Action
1.	It is the responsibility of employees and managers to enter in their own time. On occasion a Super User may have to enter time for someone that is not able to enter their own time.
2.	The ESS and MSS training materials provided lessons on how to enter in time on a timesheet.
3.	This Super User training will provide a brief overview of timesheet entry. The ESS and MSS materials are available for an in depth review and refresher on entering time on the timesheet.
4.	Click the **Time and Labor** link.
5.	Click the **Super User Timesheet** link.
6.	The Search page for the Super User Timesheet requires a complete Empl ID number, or a search can be performed using the employee's name.
7.	In this example, a Positive Time Reporter has been selected. Enter the desired information into the **Empl ID** field. Enter "**00000000022**".
8.	In addition to a name or Empl ID a Date is required. This field will default to the first of the current month. This date can be changed to look at a timesheet for a different month.
9.	Click the **Search** button.
10.	Type the TRC or use the Look up feature. Click the **Look up Time Reporting Code (Alt+5)** button.
11.	Enter the first letter of the TRC to filter the list. Enter the desired information into the **Time Reporting Code** field. Enter "**R**".
12.	Click the **Look Up** button.

Step	Action
13.	Select the appropriate TRC. Click the **REGHR** link.
14.	Enter the number of hours worked on the day that the employee worked. Enter the desired information into the **Wed 4/1 0.00** field. Enter "**8**".
15.	To move the cursor to the next day, press **[Tab]**.
16.	Enter the desired information into the **Thu 4/2 0.00** field. Enter "**8**".
17.	Each new TRC requires a separate line. Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.
18.	Friday April 3, 2015 was an Optional Holiday for Good Friday. Click the **Look up Time Reporting Code (Alt+5)** button.
19.	Enter the desired information into the **Time Reporting Code** field. Enter "**O**".
20.	Click the **Look Up** button.
21.	If the employee chooses to take the optional holiday then they can enter OHCPT, this will cause their Optional Holiday leave balance to go negative. By taking the optional holiday they are in essence agreeing to work another skeleton holiday before the end of the fiscal year. When the employee works the skeleton holiday to make up for the optional holiday, they use the REGOH TRC which will offset the negative balance. Click the **OHCPT** link.
22.	Enter the desired information into the **Fri 4/3 0.00** field. Enter "**8**".

Step	Action
23.	Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.
24.	In the second week the employee is taking sick time on Monday and then works regular hours the rest of the week.
25.	Enter the desired information into the **Time Reporting Code** field. Enter "**SICKT**".
26.	Enter the desired information into the **Mon 4/6 0.00** field. Enter "**8**".
27.	To enter the regular work hours use the REGHR line that is already on the timesheet.
28.	Enter the desired information into the **Tue 4/7 0.00** field. Enter "**8**".
29.	Enter the desired information into the **Thu 4/9 0.00** field. Enter "**8**".
30.	Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.
31.	Annual Leave is entered much the say way as regular hours. The TRC is ANVLT. Enter the hours taken on the days that the employee is using the Annual Leave time.
32.	Enter the desired information into the **Time Reporting Code** field. Enter "**ANLVT**".
33.	Enter the desired information into the **Fri 4/10 0.00** field. Enter "**8**".
34.	The employee works 10 hours a day for the week of April 13 through April 17. When Time Administration runs it will determine if the employee earns Comp Time or FLSA Overtime and bank the hours in the appropriate Comp Time Plan. The calculation is based on the employee’s FLSA Status and hours worked/leave taken through the workweek. In this example Time Admin will create 40 hours of regular time and 10 hours of overtime. The overtime is banked.
35.	Enter the desired information into the **Mon 4/13 0.00** field. Enter "**10**".

Step	Action
36.	Enter the desired information into the **Wed 4/15 0.00** field. Enter "**REGHR**".
37.	Enter the desired information into the **Time Reporting Code** field. Enter "**REGHR**".
38.	Enter the desired information into the **Fri 4/17 0.00** field. Enter "**10**".
39.	Entering hours for Comp time is just like entering Annual leave.
40.	Click the **Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015** button.
41.	Enter the desired information into the **Time Reporting Code** field. Enter "**COMPT**".
42.	Enter the desired information into the **Mon 4/20 0.00** field. Enter "**8**".
43.	Click the scrollbar.
44.	The Labor Account Code field is used by some agencies to further define time allocated for special purposes. If your agency uses Labor Account Codes they will provide training on when and how to use this field. The FMLA ID is used to designate the FMLA Event number when an employee is out on FMLA. The Comments field may be used by employees, managers, or Super Users.
45.	The Super User timesheet has both the E-Sign & Approve button, and a line Approve and Deny buttons. It is important to understand the difference between the two and when to use each one.
46.	Clicking the E-Sign & Approve button will approve time that the Super User has selected to be approved or time that the Super User has entered directly onto the Timesheet. If the Super User wants to approve time (on behalf of the manager) that the employee entered on the timesheet, the Super User would need to click the Approve (or Deny) button on each line and then click the E-Sign & Approve button on the bottom of the timesheet.

Step	Action
47.	Click the scrollbar.
48.	Since the Super User entered all the time on this timesheet only the E-Sign & Approve button needs to be clicked. Click the **E-Sign & Approve** button.
49.	This message indicates that there is a row on the timesheet that does not have a TRC. Click the **OK** button.
50.	There is not a way to delete a row once it has been added. So enter a TRC, like REGHR, that is already on the timesheet and leave the hours blank for the entire row. This row will disappear after clicking E-Sign & Approve. Enter the desired information into the **Time Reporting Code** field. Enter "**REGHR**".
51.	Click the **E-Sign & Approve** button.
52.	Click the **OK** button.
53.	Click the **Home** link.
54.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Viewing Leave Balances

Section 2, Lesson 2 Exercises, Scenario 2 - Viewing Leave Balances

Procedure

Step	Action
1.	In addition to viewing an employee's leave balances on the timesheet, the Super User can also view leave balances for employees from the main menu. Click the **Time and Labor** link.
2.	Click the **Texas Time** link.
3.	Click the **View Leave Balance/Expirations** link.
4.	Enter the desired information into the **Empl ID** field. Enter "**00000000029**".
5.	Click the **Search** button.
6.	Use the navigation links to see all the balances on one page. Click the **View All** link.
7.	Use the View 1 link to see just one leave balance on the page. Click the **View 1** link.
8.	Use the right and left arrows to navigate through the list of leave balances. Click the **Show next row (Alt+.)** button.
9.	This employee has a Comp Time leave balance of 10 hours. Comp Time can expire, to view the expiration date(s) click the drop down arrow and select a timeframe. Click the **Show Time Expiring in** list.
10.	Click the **Show All** list item.
11.	The expiration dates display. Click the **Home** link.

Step	Action
12.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Lesson 4 Overtime and Lump Sum Payouts

Paying Out Overtime

Section 2, Lesson 4 Exercises, Scenario 1 - Paying Out Overtime

Procedure

Step	Action
1.	Overtime can accrue up to 240 hours. Once an employee accrues up to or greater than 248 hours, the CAPPS system will automatically pay out the overtime hours down to 240 hours.
2.	There are occasions when an employee can be paid for the overtime they work in accordance with their agency policy. This lesson shows the Super User how to code the timesheet so the employee gets paid for their overtime worked.
3.	Click the **Time and Labor** link.
4.	Click the **Texas Time** link.
5.	Click the **Super User Timesheet** link.
6.	Enter the desired information into the **Empl ID** field. Enter "**00000000033**".
7.	Click the **Search** button.
8.	This employee has a balance of 63 hours of FLSA Overtime. In this example, the employee has been approved to be paid for 40 hours of their Overtime.

Step	Action
9.	Click the **Look up Time Reporting Code (Alt+5)** button.
10.	Use the first letter of the TRC to filter the list. Enter the desired information into the **Time Reporting Code** field. Enter "**F**".
11.	Click the **Look Up** button.
12.	Select the Banked Overtime Paid TRC. Click the **FLSAP** link.
13.	Enter the desired information into the **Sun 3/1 0.00** field. Enter "**40**".
14.	Click the **E-Sign & Approve** button.
15.	In this example, the Super User has received the necessary agency approvals to pay the employee prior to entering the FLSAP TRC. Click the **OK** button.
16.	The Overtime will be paid to the employee on the next payroll. Click the **Home** link.
17.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Running the Banked Overtime Paydown Process

Section 2, Lesson 4 Exercises, Scenario 2 - Running the Banked Overtime Process

Procedure

Step	Action
1.	Overtime can accrue up to 240 hours. Once an employee accrues additional hours equal to or greater than 248 hours, the CAPPS system will automatically pay out the overtime hours that are above 240 hours.
2.	On occasion the Super User may need to run the Banked Overtime Paydown process. This lesson provides the steps for running the process.
3.	Click the **Time and Labor** link.
4.	Click the **Process Time** link.
5.	Click the **Banked Overtime Paydown** link.
6.	Click the **Add a New Value** tab.
7.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
8.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
9.	It is a good idea to add your initials after the Run Control ID in order to make it easier for the CAPPS Support team to assist in the event of an issue with the process. In training the initials have been left off. Enter the desired information into the **Run Control ID** field. Enter "**BankedOT**".
10.	Click the **Add** button.

Step	Action
11.	Running this process requires an As Of Date so the system knows when to process the pay out as of the date that is entered into this field. The As Of Date is a required field used to run this process. The system uses this field to process the criteria that is entered on this page. FLSAP is written to the timesheet using this date. Employees that do not meet the criteria of having a balance equal to or greater than the threshold will not be impacted. Enter the desired information into the **As Of Date** field. Enter "**04302015**".
12.	The Threshold Amount tells the system to pay down overtime until the employee reaches this amount. In this example 200 hour is used. Enter the desired information into the **Threshold Amount** field. Enter "**200**".
13.	The Paydown Amount field is used to determine what the employee's overtime balance should be paid down to. Enter the desired information into the **Paydown Amount** field. Enter "**180**".
14.	Enter in the Agency's number. Enter the desired information into the **Company** field. Enter "**T32**".
15.	Click the **Run** button.
16.	Use the Process Scheduler Request page to enter or update parameters, such as report output type and format. For this report, no information needs to be updated.
17.	The Description field helps to uniquely identify a process.
18.	The Process Name field displays the name of the process as it appears in the technical definition.
19.	Click the **OK** button.
20.	The process is now running. Notice a Process Instance number displays. This number identifies the process you have just run; you can check its status using Process Monitor.

Step	Action
21.	Click the **Process Monitor** link.
22.	The Process Instance number displays. It helps identify the report or process from others in the list.
23.	The current Run Status of this process displays as Queued. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
24.	Click the Refresh button until the screen shows Success and Posted. Click the **Refresh** button.
25.	To validate the process paid the employee down to the specified amount click on the Details link. Click the **Details** link.
26.	Click the **View Log/Trace** link.
27.	Click the **astl1012_5493154.PDF** link.
28.	A report opens with the results of the employees that were paid down. In this example there were no employees that met this threshold. Click the **Close** button.
29.	Click the **Return** button.
30.	Click the **Cancel** button.
31.	Click the **Home** link.
32.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Lesson 5 Payable Time

Viewing Payable Time

Section 2, Lesson 5 Exercises, Scenario 1 - Viewing Payable Time

Procedure

Step	Action
1.	There are two ways to view Payable Time. The Summary page or the Details page. This lesson will show both pages.
2.	Viewing Payable Time can be helpful when trying to assist employees or managers with paycheck issues. It can also be helpful to help troubleshoot timesheet errors.
3.	Click the **Time and Labor** link.
4.	Click the **Texas Time** link.
5.	Click the **Payable Time Summary** link.
6.	Enter in the employees ID number. Enter the desired information into the **Empl ID** field. Enter "**00000000024**".
7.	The date defaults to the current date but can be changed as needed. In this scenario use March 1, 2015. It is best practice to use the employee’s FLSA workweek start date when selecting the week to view. Click the **Choose a date (Alt+5)** button.
8.	Click the **1** link.
9.	Click the **Search** button.

Step	Action
10.	The Payable Time Summary page displays one week at a time. It shows the Time Reporting Code (left Column), the hours that are entered on the timesheet, and the employee's scheduled hours.
11.	Use the Previous Week and Next Week links to navigate to different payable time weeks for the employee.
12.	Click the **Home** link.
13.	The Payable Time Details page shows more information. Click the **Time and Labor** link.
14.	Click the **Texas Time** link.
15.	Click the **Payable Time Detail** link.
16.	Enter the employee's ID number. Enter the desired information into the **Empl ID** field. Enter "**00000000024**".
17.	In this scenario select March 1, 2015 as the date. It is best practice to use the employee's FLSA workweek start date when selecting the week to view. Click the **Choose a date (Alt+5)** button.
18.	Click the **1** link.
19.	Click the **Search** button.
20.	Click the scrollbar.

Step	Action
21.	This page provides a more complex and detailed view from the Payable Time Summary page. Click the **Return to Select Employee** link.
22.	Click the **Home** link.
23.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Closing Payable Time

Section 2, Lesson 5 Exercises, Scenario 2 - Closing Payable Time

Procedure

Step	Action
1.	After Payable Time is created it is pulled in by Payroll to create paychecks. On occasion if there is an issue, the Payroll team may need to have Payable Time closed for an employee.
2.	**Payable Time should only be closed in rare instances. Once Payable Time is closed it cannot be reopened.** **An example of when Payable Time may need to be closed may occur when money owed for a past pay period pulls onto the paycheck, but is no longer valid.** **Contact CAPPS Support to walk through the process and verify that this is a valid scenario before closing Payable Time.**
3.	Incorrectly closing the wrong Payable Time could result in an employee not getting paid or later getting docked time on their next paycheck.
4.	Click the **Time and Labor** link.
5.	Click the **Texas Time** link.

Step	Action
6.	Click the **Close Payable Time** link.
7.	Enter the desired information into the **Empl ID** field. Enter "**00000000238**".
8.	A specific TRC can be entered, or if the field is left blank all TRCs will be included.
9.	Select a Status to Update. In this example, accept the default of Closed.
10.	Enter the desired information into the **Start Date** field. Enter "**03012015**".
11.	Enter the desired information into the **End Date** field. Enter "**03312015**".
12.	Click the **Get Row** button.
13.	Select the row of Payable Time that needs to be closed. Based on the payroll validation.
14.	To move down the page, click the scrollbar.
15.	Click the **Save** button.
16.	Time Admin must be run for this employee before the Payable Time will close. Click the **Home** link.
17.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 3 Sick Leave Pool

Lesson 1 - Awards and Donations

Awarding Sick Leave from the Pool

Section 3, Lesson 1 Exercises Scenario 1 - Awarding Sick Leave from the Pool

Procedure

Step	Action
1.	Each agency has the authority to award Sick Leave Pool hours to employees who have exhausted all of their sick leave because of a catastrophic illness or injury of the employee or of a member of the employee's immediate family.
2.	Click the **Time and Labor** link.
3.	Awarding Sick Leave Pool hours to an employee is done on the Super User Timesheet. Click the **Super User Timesheet** link.
4.	Enter the Empl ID for the employee that is receiving the Sick Leave Pool hours. Enter the desired information into the **Empl ID** field. Enter "**00000000246**".
5.	The date populates with the beginning of the current month. This date may be changed as needed.
6.	Click the **Search** button.
7.	Verify that the name matches to the employee that is receiving the Sick Leave Pool hours.
8.	Only a person with the Sick Leave Pool Administrator role has access to the Sick Leave Pool Adjustment page, View Company Sick Leave Pool page and Sick Leave Pool FY Balance Process page. However, both Sick Leave Pool Administrators and Super Users have the ability to add Sick Leave Pool hours to an employee's timesheet. The SCKPA Time Reporting Code is added to the timesheet with the amount of the awarded hours.
9.	The Time Reporting Code can be typed into the field. In this example the Look up button is used to enter the code. Click the **Look up Time Reporting Code (Alt+5)** button.
10.	Filter the list by entering the first letter of the TRC. Enter the desired information into the **Time Reporting Code** field. Enter "**s**".

Step	Action
11.	Click the **Look Up** button.
12.	Select the Sick Leave Pool Awarded TRC. Click the **SCKPA** link.
13.	Click on the day that you wish to add the hours. In this example the Sick Leave Pool award will occur on the first of March.
14.	Enter the number of hours that is awarded to the employee. Enter the desired information into the **Sun 3/1 0.00** field. Enter "**40**".
15.	Click the **E-Sign & Approve** button.
16.	This warning message is a reminder that the proper documentation for your agency must be followed prior to awarding the hours to the employee. Click OK if the documentation is in place or click cancel to cancel the transaction. Click the **OK** button.
17.	Click the **OK** button.
18.	Notice that the Sick Leave Pool hours are now on the employee's timesheet and are available for use.
19.	Click the **Home** link.
20.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Donating Sick Leave to the Pool

Section 3, Lesson 1 Exercises Scenario 2 - Donating Sick Leave to the Pool

Procedure

Step	Action
1.	Employees have the ability to donate some of their sick leave time to the Sick Leave Pool. Agencies will typically have some type of form or documentation that the employee completes to authorize the donation. Click the **Time and Labor** link.
2.	Click the **Super User Timesheet** link.
3.	Enter the Empl ID for the employee that is donating their sick leave to the Sick Leave Pool. Enter the desired information into the **Empl ID** field. Enter "**00000000200**".
4.	The date populates with the beginning of the current month. This date may be changed as needed.
5.	Click the **Search** button.
6.	Verify that the employee name matches the name of the person donating the sick leave.
7.	In this scenario the employee currently has 144 hours of Sick Leave.
8.	Enter the Time Reporting Code or use the Look up button to find the code in the list of available options. Click the **Look up Time Reporting Code (Alt+5)** button.
9.	To shorten the list, type the first letter of the leave type. Enter the desired information into the **Time Reporting Code** field. Enter "**s**".
10.	Click the **Look Up** button.
11.	The list of leave codes beginning with an S displays. Click the **SICKPD** list item.

Step	Action
12.	Enter the amount of hours that the employee has agreed to donate. In this example the employee has agreed to donate 40 hours of sick leave to the Sick Leave Pool. Enter the desired information into the **Sun 3/1 0.00** field. Enter "**40**".
13.	Click the **E-Sign & Approve** button.
14.	Click the **OK** button.
15.	Notice that the 40 hours is now removed from the available balance for this employee.
16.	Click the **Home** link.
17.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Adjusting the Agency's Sick Leave Pool Balance

Section 3, Lesson 1 Exercises Scenario 3 - Adjusting the Agency's Sick Leave Pool

Procedure

Step	Action
1.	It is only on rare occasions that this process will be utilized. One example reason would be that the USPS balance and the original balance were different. CAPPS would need to be adjusted so it matched the balance in USPS.
2.	Click the **Time and Labor** link.
3.	Click the **Texas Time** link.

Step	Action
4.	Use this page to make adjustments to the overall Sick Leave Pool balance. **Note**: this is an extremely rare circumstance and an agency business practice/approval process/documentation requirements outside of CAPPS should be created for this situation. Click the **Sick Leave Pool Adjustment** link.
5.	Enter in the agency number. In this example, the agency is T32. Enter the desired information into the **begins with** field. Enter "**T32**".
6.	Click the **Search** button.
7.	The Company (agency) number display along with the name of the agency. The Adjustment Date field lists the dates for each Sick Leave Pool adjustment.
8.	The Sequence Number is a required field. This number is a running line count. The Adjustment Type has two values: • I for an adjustment into the pool • O for a decrease adjustment to the pool
9.	The Adjustment Amount is for the total hours that the pool is being adjusted.
10.	To enter an adjustment to the total pool hours, add a new row. Click the **Add a new row at row 3 (Alt+7)** button.
11.	Type the date of the adjustment or use the calendar feature to select the date. Click the **Choose a date (Alt+5)** button.
12.	Click the **10** link.
13.	Enter the next sequential number. In this example the number is 4. Enter the desired information into the **Sequence Number** field. Enter "**4**".
14.	Click the **Look up Adjustment Type (Alt+5)** button.

Step	Action
15.	Click the **Adjustment In** link.
16.	This example increases the agency's total Sick Leave Pool balance by 40 hours. Enter the desired information into the **Adjusted Amount** field. Enter "**40**".
17.	Enter a comment to identify the reason for the adjustment. The field is 30 characters long. Enter the desired information into the **Comment** field. Enter "**Feb 2014 adjustment**".
18.	Click the **Save** button.
19.	Click the **Home** link.
20.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Lesson 2 - Fiscal Year End Sick Leave Pool Process

Fiscal Year End Sick Leave Pool Process

Section 3, Lesson 2 Exercises Scenario 1 - Fiscal Year End Sick Leave Pool Process

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	In this example the year 2013 is used to run this process. Click the **Time and Labor** link.
2.	Click the **Process Time** link.

Step	Action
3.	Click the **Sick Leave Pool FY Balance** link.
4.	Click the **Add a New Value** tab.
5.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
6.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
7.	Run Control IDs are stored by User ID. CAPPS Support Staff can see the run control ID's and recommend using initials to help identify a user who runs a process.
8.	Enter the desired information into the **Run Control ID** field. Enter "**FYE**".
9.	Click the **Add** button.
10.	In this example, enter 2013. Enter the desired information into the **Fiscal Year** field. Enter "**2013**".
11.	Enter in the agency's number. Or use the Look up feature to look up the agency number. Enter the desired information into the **Company** field. Enter "**T32**".
12.	Save the information in one of two ways: (1) Click on Save, this is useful to change the Run Control Parameters. (2) Click Run. The Run Control ID will be saved with the information on the screen, and the process will be run.
13.	Click the **Run** button.
14.	Use the Process Scheduler Request page to enter or update parameters, such as report output type and format. For this process, no information needs to be updated.

Step	Action
15.	The Description field helps to uniquely identify a process.
16.	The Process Name field displays the name of the process as it appears in the technical definition.
17.	The Process Type field displays the type of process, such as SQR Report, BI Publisher and so on.
18.	Use the **Type** field to select the type of output to generate for this job. The four choices are File, Printer, Email, or Web. **File**: Writes the output to a file that will appear in an Output Destination specified by the user. **Printer**: You can enter a custom printer location if you have the appropriate security access. **Email**: You can enter the destination information to send to a particular email recipient(s). Note that Email is available only for a few process types, such as SQR, PS/nVision, and BI Publisher reports. **Web**: Sends all output of the process to the report repository, including log and trace files.
19.	Use the Format field to define the output format for the report. The values are dependent upon the process type selected. In this example, the default value is PDF.
20.	Click the **OK** button.
21.	The process is now running. Notice a Process Instance number displays. This number identifies the process you have just run; you can check its status using Process Monitor.
22.	Click the **Process Monitor** link.
23.	The Process List group box lists all of your requested processes.
24.	The current Run Status of this process displays as Processing. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
25.	Click the Refresh button until the screen shows Success and Posted. Click the **Refresh** button.
26.	Click the **Details** link.

Step	Action
27.	Click the **View Log/Trace** link.
28.	Click on the process name to view the results. Some processes do not have results. If a report was selected to run as a PDF, the file is easier to spot in the list because it will end in .pdf. Click the **htsl105_5492565.PDF** link.
29.	After viewing or printing the information, click the **Close** button.
30.	Click the **Close current tab** button.
31.	Click the **Return** button.
32.	Click the **OK** button.
33.	Click the **Home** button.
34.	This completes the lesson on running the Fiscal Year End Sick Leave Pool Process. **End of Procedure.**

Lesson 3 - Review and Knowledge Check

Section 4 Troubleshooting Time and Labor

Lesson 1 Managing Exceptions

Running the Exceptions Query

Section 4, Lesson 1 Exercises, Scenario 1 - Running the Exceptions Query

Procedure

Step	Action
1.	Resolving Exceptions is a daily duty of the Time and Labor Super User. Exceptions lock the employee and the manager out of the timesheet and they can only edit it after the Super User has cleared all of the exceptions.
2.	After Time Administration runs every night, there may be some exceptions created. In order to identify the exceptions, the TL Super User can run the query to see the exceptions.
3.	Click the **Reporting Tools** link.
4.	Click the **Query Viewer** link.
5.	All of the Time and Labor queries will begin with TX_TL. The queries will be listed alphabetically.
6.	Enter the desired information into the **begins with** field. Enter "**TX_TL**".
7.	Click the **Search** button.
8.	There are many different queries that the TL Super User can use. This lesson reviews only one of the queries that can be used for exceptions.
9.	Queries can be run in HTML, XML, or Excel. The HTML and XML formats can be viewed on the monitor. This is useful for displaying information in a quick manner. Queries can also be run to Excel which puts the requested information into an Excel spreadsheet. The spreadsheet can be sorted, printed, and saved as needed.
10.	Queries can also be added as a Favorite. When a query is selected as a Favorite, it will display on the original Query Viewer Search page. This will make navigation easier.
11.	Click the **Excel** link.
12.	Enter the Agency number. Enter the desired information into the **Company** field. Enter "**T32**".
13.	Click the **View Results** button.

Step	Action
14.	Click the **Open** button.
15.	The employees with exceptions will display in an Excel spreadsheet. The information can be sorted and printed as needed.
16.	The Description field will provide the reason for the exceptions.
17.	The Empl ID will allow the Super User to identify the employee so they can access their timesheet to resolve the error.
18.	Click the **Close** button.
19.	Internet Explorer can be set up differently so your view may be different. Close the window to return to the CAPPS system. Click the **Close** button.
20.	Click the **Close current tab** button.
21.	Click the **Home** link.
22.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Manage Exceptions page

Section 4, Lesson 1 Exercises, Scenario 2 - Manage Exceptions Page

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	The Manage Exceptions page allows the TL Super User to look up the exceptions by the Empl ID. So if you have the Empl ID this page will display the exceptions.
2.	Click the **Time and Labor** link.
3.	Click the **Texas Time** link.

Step	Action
4.	Click the **Manage Exceptions** link.
5.	This search page allows the user to search for exceptions by Empl ID or for everyone in the agency.
6.	Enter the desired information into the **Empl ID** field. Enter "**00000000020**".
7.	Click the **Search** button.
8.	Click the **00000000020** link.
9.	The employee name and their exception displays. In this example the exception is TXTL0017 and the fix is to rerun Time Admin to allow the accrual to catch up for this employee.
10.	Click the **Home** link.
11.	This completes the lesson on the Manage Exceptions page. **End of Procedure.**

Running the Ad Hoc Time Admin Process

Section 4, Lesson 1 Exercises Scenario 2 - Running an Ad Hoc Time Admin

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	Time Administration automatically runs every night. The exceptions are generated during this process. It is recommended that a Super User resolve exceptions on a daily basis. After resolving exceptions, it is a good idea to run an ad hoc Time Admin process for that individual to reprocess their time and ensure that all exceptions are cleared for the employee.
2.	Click the **Time and Labor** link.

Step	Action
3.	Click the **Process Time** link.
4.	Click the **Request Time Administration** link.
5.	Click the **Add a New Value** tab.
6.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
7.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
8.	It is a good idea to add your initials after the Run Control ID in order to make it easier for the Production Support team to assist in the event of an issue with the process. In training the initials have been left off. Enter the desired information into the **Run Control ID** field. Enter "**TA1**".
9.	Click the **Add** button.
10.	If Time Admin is run for the entire agency during the day the system will slow down for **everyone** in the CAPPS system. It is important to select the run parameters for only the employees that you need to run time administration.
11.	Time Admin should be run through, and no later than, the last day of the current month. If it is run later than the current month then Payable Time will be created for a future month(s). In some situations this can potentially create future-dated exceptions that the TL Super User will need to resolve. Click the **Choose a date (Alt+5)** button.
12.	Click the **31** link.
13.	Time Admin can be run for one employee or multiple employees at one time.

Step	Action
14.	The Group ID field can be used so Time Admin can be run for the entire agency or a group of people within the agency. Running Time Admin for the entire group will slow the CAPPS system down for everyone.
15.	If a group is selected, people who are in the group can be excluded.
16.	To add or exclude employees, use the plus sign to add additional rows. Use the minus sign to remove a row.
17.	In this example, Time Admin needs to be run for two employees. Enter the desired information into the **Empl ID** field. Enter "**00000000200**".
18.	Click the **Add a new row at row 1 (Alt+7)** button.
19.	Enter the desired information into the **Empl ID** field. Enter "**00000000029**".
20.	Click the **Run** button.
21.	Click the **OK** button.
22.	Notice a Process Instance number displays. The process is now running. This number identifies the process you have just run; you can check its status using Process Monitor.
23.	Click the **Process Monitor** link.
24.	The Process Instance number displays. It helps identify the report or process from others in the list.
25.	The current Run Status of this process displays as Processing. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
26.	Click the **Refresh** button.
27.	Sometimes Time Admin may need to be run multiple times for the same employee if new exceptions are created. Super Users should check for new exceptions after an ad hoc Time Admin run has completed. Click the **Go back to Request Time Administration** link.

Step	Action
28.	Click the **Home** link.
29.	This completes the lesson. **End of Procedure.**

Lesson 2 Updating and Processing Information

Updating the Earliest Change Date

Section 4, Lesson 1 Exercises Scenario 3 - Updating the Earliest Change Date

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	The Earliest Change Date (ECD) is the starting point for when Time Admin runs for an employee. After Time Admin has processes, the ECD is set to the 1st of the next month but may be different when there is an exception. Normally Time Admin will reset the ECD but there are occasions when a Super User will need to reset it manually.
2.	If a Super User is entering retroactive entries or changes to the timesheets they need to be aware that when they make these entries it changes the Earliest Change Date to match the earliest time entry date and Time Admin will run from that date forward. It is rare when a TL Super User would need to manually update the ECD.
3.	Click the **Time and Labor** link.
4.	Click the **Texas Time** link.
5.	Click the **Update Earliest Change Date** link.
6.	Enter the desired information into the **Empl ID** field. Enter "**00000000200**".
7.	Click the **Search** button.

Step	Action
8.	**Note:** The ECD can only be in the past and, cannot be future dated. Click the **Choose a date (Alt+5)** button.
9.	Click the **September** list.
10.	Click the **1** link.
11.	Click the **Save** button.
12.	**End of Procedure.**

Section 5 Time and Labor Set Up

Lesson 1 - Time and Labor Set Up

Viewing Time Reporter Data

Section 5, Lesson 1 - Exercises - Scenario 1 - Viewing Time Reporter Data

The Maintain Time Reporter Data page is a view only page for the Agencies but it can provide some information when there are issues with time reporting for an employee.

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	When an employee is hired, their Time Reporter Data is automatically setup. However, there may be times when this data may need to be added or updated. Updating this information requires a support ticket.
2.	Click the **Time and Labor** link.

Step	Action
3.	Click the **Enroll Time Reporters** link.
4.	Click the **Maintain Time Reporter Data** link.
5.	Enter the desired information into the **Empl ID** field. Enter "**00000000022**".
6.	Click the **Search** button.
7.	The Time and Labor Time Reporter Data is set up at the time a person is hired or at the time of conversion onto the CAPPS system. If a change is needed to the data on this view only page, validate the employee's job and position data are set up correctly. If the job and position data are incorrect then enter a support ticket and the Production Support team will work with you to help resolve the issue. **Note**: Contingent workers require a service request ticket to setup their Time Reporter Data.
8.	Understanding the fields on this page can help to explain some of the issues that occur during the Time Administration process.
9.	Verify that the correct employee is returned in your search.
10.	The most recent row of data displays. It is the date that the employee was enrolled as a time reporter with these criteria.
11.	All Agency employees are Elapsed Time Reporters. That means that employees are not required to punch in their time.
12.	Verify that the Send Time to Payroll is checked for employees, but this will not be selected for contingent workers.
13.	A workgroup is a group of time reporters that have the same type of work requirements. For example, a workgroup may include all time reporters within the agency that are exempt hourly. Another workgroup may contain all of the non-exempt hourly workers with the agency.
14.	A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for time reporters with the same task reporting requirements. Each time reporter must be associated with one taskgroup.
15.	The Task Profile ID will also contain the agency number.

Step	Action
16.	If any of the items appear to be incorrect, validate the employee's job and position data are set up correctly. If the job and position data are correct then enter a support ticket and the Production Support team will make the change or discuss the situation and work with you to help resolve the issue. Click the **Home** link.
17.	This completes Viewing Time Reporter Data. **End of Procedure.**

Comp Plan Enrollment

Section 5, Exercises Scenario 1 - Comp Plan Enrollment

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	When an employee is hired, they are automatically enrolled into the Comp Plans. However, there may be times when this data may need to be added or updated.
2.	Click the **Time and Labor** link.
3.	Click the **Enroll Time Reporters** link.
4.	Click the **Comp Plan Enrollment** link.
5.	Enter the desired information into the **Empl ID** field. Enter "**0000000104**".
6.	Click the **Search** button.
7.	Verify that the name matches the employee for this search.

Step	Action
8.	There are 13 comp plans for this employee but he is only enrolled in 12. Use the left and right arrows to navigate and see the next 3 leave plans.
9.	Use the View All link to see all rows of data on one page. Click the **View All** link.
10.	To return to a partial view, click the View 3 link.
11.	Comp Plans are Effective Dated, so add a new row on the Comp Plan Enrollment row. Click the **Add a new row at row 1 (Alt+7)** button.
12.	The data from the previous enrollment is copied over to the new row of data. The Effective Date automatically populates with the current date but may be changed as needed. Comp Plans usually are effective at the date of hire. This row will need to have a 03/01/2015 date. Click the **Choose a date (Alt+5)** button.
13.	Click the **1** link.
14.	Now that the Effective Date is entered, add a row to enter the additional Comp Plan. Click the **Add a new row at row 12 (Alt+7)** button.
15.	To view a list of all available Comp Plans, click the **Look up** button.
16.	This employee is missing the Emergency Fitness Leave Plan. Click the **FITNESSLV** link.
17.	The Status field defaults to Active. In CAPPS, employees are enrolled in all available Comp Plans. In this scenario the Comp Plan is being added as an Active plan.

Step	Action
18.	If additional Comp Plans need to be added for this employee a new row can be added. In this scenario this employee now has all 13 plans so no more rows are needed. If a row needs to be deleted, click the minus sign.
19.	To complete the transaction of adding the Emergency Fitness Leave Comp Plan for this employee, click the **Save** button.
20.	Click the **Home** link.
21.	This completes Comp Plan Enrollment. **End of Procedure.**

Lesson 2 - Modifying Work Schedules

Flexing or Overriding a Work Schedule

Section 5, Lesson 2 Exercises Scenario 1 - Temporary Work Schedule Changes

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	The first way a schedule change can be adjusted is directly on the timesheet. Click the **Time and Labor** link.
2.	Click the **Texas Time** link.
3.	Click the **Super User Timesheet** link.
4.	Enter the desired information into the **Empl ID** field. Enter "**00000000080**".

Step	Action
5.	Click the **Search** button.
6.	This employee flexed their scheduled and worked 6 hours on Monday and 10 hours on Tuesday. The hours can be added directly to the timesheet by entering 2 hours on Monday as FLEXS and then 10 hours on Tuesday as REGHR.
7.	Enter the desired information into the **Time Reporting Code** field. Enter "**FLEXS**".
8.	Enter in the number of hours that the employee flexed or did not work. Enter the desired information into the **Mon 4/6 8.00** field. Enter "**2**".
9.	Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.
10.	Enter the desired information into the **Time Reporting Code** field. Enter "**REGHR**".
11.	Enter the desired information into the **Tue 4/7 8.00** field. Enter "**10**".
12.	This employee is an exception based time reporter. If they work the rest of the week as scheduled, then no other entries need to be made on the timesheet.
13.	Click the scrollbar.
14.	When a Super User enters time on the Timesheet, the Status will always be AP for Approved.
15.	If your agency uses the Labor Account Code fields then complete these fields per their instructions.
16.	Click the scrollbar.

Step	Action
17.	Use the E-Sign & Approve button to save and complete the entries on the timesheet. **Note**: If there is a line on the timesheet that has the Status of NA or Needs Approval, and the Super User needs to approve that time for the manager, the Super User will need to click the Line Approval button before clicking the E-Sign & Approve button. Click the **E-Sign & Approve** button.
18.	Click the **OK** button.
19.	Click the **Home** link.
20.	Another way to enter the change in schedule is to use the Override Work Schedule link on the Super User Timesheet for the employee. Click the **Time and Labor** link.
21.	Click the **Texas Time** link.
22.	Click the **Super User Timesheet** link.
23.	Enter the desired information into the **Empl ID** field. Enter "**0000000049**".
24.	Click the **Search** button.
25.	This employee is working 10 hours on Monday thru Thursday and will not work on Friday the first week in March. Click the **Override Schedule** link.
26.	Enter the total hours each day that the employee works per day. In this example enter 10 on Monday thru Thursday and 0 on Friday. Enter the desired information into the **Monday 03/02/2015** field. Enter "**10**".

Step	Action
27.	Press **[Tab]**.
28.	Enter the 10 hours for Tuesday and press **[Tab]** to go to the next day.
29.	Enter the 10 hours for Wednesday and press **[Tab]** to go to the next day.
30.	Enter the 10 hours for Thursday and press **[Tab]** to go to the next day.
31.	Enter 0 hours for Friday. Enter the desired information into the **Friday 03/06/2015** field. Enter "**0**".
32.	Click the **E-Sign & Approve** button.
33.	Click the **OK** button.
34.	Notice that the scheduled hours for the first week now reflect the change to four 10 hour days.
35.	Click the **Home** link.
36.	This completes the lesson on Temporary Work Schedule Changes. **End of Procedure.**

Modifying Work Schedules

Section 5, Lesson 2 - Exercises - Scenario 2 - Modifying Work Schedules

Procedure

When an employee's work schedule permanently changes, use the Assign Work Schedule menu option to change their scheduled days and hours.

In this example the employee is changing from an 8 hour day Monday through Friday, to a 10 hour day Monday through Thursday schedule.

Step	Action
1.	Click the **Time and Labor** link.
2.	Click the **Enroll Time Reporters** link.
3.	Click the **Assign Work Schedule** link.

Step	Action
4.	Enter the desired information into the **Empl ID** field. Enter "**00000000312**".
5.	Click the **Search** button.
6.	Work Schedules are Effective Dated. To change a schedule a new row must be added and then the new schedule can be selected. Click the **Add a new row at row 1 (Alt+7)** button.
7.	The data is copied to the new row and the Effective Date defaults to the current date. Change the Effective Date to the first day that the new work schedule will take effect. The schedule change should be made effective at the beginning of the employee’s FLSA workweek. Click the **Choose a date (Alt+5)** button.
8.	In this example, change the date to March 1, 2015 Click the **1** link.
9.	The schedules are loaded into the CAPPS system, so you can select from the list. Click the **Look up Schedule ID (Alt+5)** button.
10.	There are hundreds of possible schedules and the system only displays the first 300 items.
11.	Understanding the naming convention will help to narrow the search. All schedules start with TX_, next are the total hours that are worked in a week.
12.	In this example the employee is working a 40 hour work week.
13.	Enter TX_40 in the Schedule ID field. This will narrow the list so that just the 40 hour work schedules display. Enter the desired information into the **Schedule ID** field. Enter "**TX_40**".

Step	Action
14.	Click the **Look Up** button.
15.	Notice that just the 40 hour work week schedules display. There are currently 226 different 40 hour work week schedules to choose from.
16.	The Description field contains the Sunday through Saturday work days. An XX denotes that no hours are worked on that day. Some schedules also contain letters on different days of the week.
17.	This table shows what each letter stands for in the description field.
18.	After the letter there will be a 0 or a 5. This indicates a whole or half hour. This first schedule contains K0 which is a 16 hour work schedule. If the schedule were K5 it would be a 16.5 hour work day.
19.	In this scenario we are changing the employee to a 10 hour, Monday through Thursday work schedule. Enter the code based on the chart or look through the possible options in the list. Scroll down the list to locate the correct schedule. Click the scrollbar.
20.	Click the **TX_40_00DDDD0** link.
21.	Use the Show Schedule link to verify that the correct schedule is selected. Click the **Show Schedule** link.
22.	Verify that the new schedule is correct. Click the **Close** button.
23.	If the schedule is incorrect re-select the correct schedule.
24.	Once the schedule is saved, the timesheet for exception time reporters will display the new work hours on the correct days. Click the **Save** button.

Step	Action
25.	This message indicates that the new schedule did not start on the first scheduled work day. Our schedule started on March 1 which is a Sunday and will not affect our change. The Super User should verify whether or not the schedule change can impact the employee. Depending on the type of schedule chosen it could potentially impact an employee's pay. Click the **OK** button.
26.	This warning message indicates that we entered the change to start in the past. The schedule should be evaluated to determine there if there are any issues. If the schedule needs to be updated then you should edit it after clicking the OK button. Click the **OK** button.
27.	The new work schedule is now saved. Click the **Home** link.
28.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Lesson 3 - Shift Differential Pay

Modifying Differential Pay Rate

Section 5, Lesson 3 Exercises - Modifying Differential Pay Rate

Procedure

Congratulations! You have successfully completed this lesson.

Step	Action
1.	Click the **Time and Labor** link.
2.	Click the **Texas Time** link.

Step	Action
3.	Click the **Differential Pay Rate Setup** link.
4.	Enter the desired information into the **Empl ID** field. Enter "**00000000081**".
5.	Click the **Search** button.
6.	The Differential Pay Rate Setup page is an effective dated page. To change the rate, a new row must be added. If the employee previously did not have a shift rate, then the current row can be adjusted accordingly. Click the **Add a new row at row 1 (Alt+7)** button.
7.	The data is copied to the new row and the Effective Date defaults to the current date. Change the Effective Date to the first day that the new work schedule will take effect In this example the new shift differential begins at the first of March 2015. Enter the desired information into the **Shift Differential Pay Effective Date** field. Enter "**03012015**".
8.	Notice that there are now 2 rows of data.
9.	Click the **Shift Differential Type** list.
10.	The Shift Differential field must match the Regular Shift field in Job Data. If the fields do not match an error will display and the change will not save. Click the **Night&Wknd** list item.
11.	The shift fields will open based on the type of shift that the employee can work. In this example the employee is set up to work nights and weekends. So only the Regular Night Shift and Regular Weekend Shift fields are open to a change.
12.	The allowable values display the possible increase range. These values are percentages. The current percentage for employee working a regular night shift will receive a 1.5% increase for the hours worked on that schedule.
13.	The Regular Weekend Shift differential range for this employee is between 1 and 5 percent. He currently receives a 5% increase for working a regular weekend shift.

Step	Action
14.	In this example enter a new Regular Night Shift increase. Enter the desired information into the **Regular Night Shift (1.0 - 15.0)** field. Enter "**2.5**".
15.	Click the **Save** button.
16.	This employee now receives the new shift differential rate for regular night shift worked starting on 3/1/15. Click the **Home** link.
17.	This completes the Modifying Differential Pay Rate lesson. **End of Procedure.**

Lesson 4 FYE Annual Leave Conversion

Running the FYE Annual Leave Conversion

Section 5, Lesson 4 Exercises - Running the FYE Annual Leave Conversion

Procedure

Step	Action
1.	Click the **Time and Labor** link.
2.	Click the **Process Time** link.
3.	Click the **FYE Annual Leave Conversion** link.

Step	Action
4.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
5.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
6.	Run Control IDs are stored by User ID. However we suggest that you add your initials on the Run Control ID in the event that the CAPPS Support Staff needs to assist with a possible issue.
7.	Click the **Add a New Value** tab.
8.	In training we left off the user's initials since each person would be different. Enter the desired information into the **Run Control ID** field. Enter "**SickLeaveCon**".
9.	Click the **Add** button.
10.	Click the **Look up Company (Alt+5)** button.
11.	Click the **T32** link.
12.	Save the information in one of two ways: (1) Click on Save, this is useful to change the Run Control Parameters. (2) Click Run. The Run Control ID will be saved with the information on the screen, and the process will be run.
13.	Click the **Run** button.
14.	Use the Process Scheduler Request page to enter or update parameters, such as report output type and format. For this report, no information needs to be updated.
15.	The Description field helps to uniquely identify a process.

Step	Action
16.	The Process Name field displays the name of the process as it appears in the technical definition.
17.	The Process Type field displays the type of process, such as SQR Report, BI Publisher and so on.
18.	Use the **Type** field to select the type of output to generate for this job. The four choices are File, Printer, Email, or Web. **File**: Writes the output to a file that will appear in an Output Destination specified by the user. **Printer**: You can enter a custom printer location if you have the appropriate security access. **Email**: You can enter the destination information to send to a particular email recipient(s). Note that Email is available only for a few process types, such as SQR, PS/nVision, and BI Publisher reports. **Web**: Sends all output of the process to the report repository, including log and trace files.
19.	Use the Format field to define the output format for the report. The values are dependent upon the process type selected. In this example, the default value is PDF.
20.	Click the **OK** button.
21.	The report is now running. Notice a Process Instance number displays. This number identifies the process you have just run; you can check its status using Process Monitor.
22.	The Process Monitor provides a Process List page to view the status of submitted report/process requests. Click the **Process Monitor** link.
23.	The Process List group box lists all of your requested processes.
24.	The current Run Status of this process displays as Processing. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
25.	Click the Refresh button until the screen shows Success and Posted. Click the **Refresh** button.

Step	Action
26.	After the process is run the agency should then navigate to the FYE Annual Leave Conversion report. This report must be run in order to view the results of the conversion. Main Menu > Time and Labor > Texas Reports > FYE Annual Leave Conv Report
27.	Employees who are terminated with an effective date greater than 09/01 through the action date that the process is run must be cared for manually. Super Users must evaluate those employees to ensure that the proper balance is carried forward into the new fiscal year and that the correct lump sum hours are paid out.
28.	Click the **Home** link.
29.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 6 Reports and Queries

Lesson 1 - Reports and Queries

Running the Employee Monthly T&L Report

Section 6, Exercises Scenario 1 - Running the Employee Monthly Time and Leave Report

Procedure

Step	Action
1.	Click the **Time and Labor** link.
2.	Click the **Texas Reports** link.
3.	Click the **Employee Monthly T&L Rpt** link.

Step	Action
4.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
5.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
6.	If you have an established Run Control ID for this report, use that instead of adding a new value. For this example, a new value is added. Click the **Add a New Value** tab.
7.	In this example enter EEMonthlyPR to identify the name of the report and your initials. Enter the desired information into the **Run Control ID** field. Enter "**EEMonthlyPR**".
8.	Click the **Add** button.
9.	Use the Look up button to select the end of the month that you wish to view. Click the **Look up As of Date (Alt+5)** button.
10.	Click the **03/31/2015** link.
11.	Select the Show LAC to view Labor Account Codes, if the agency uses them for time reporting.
12.	When the Show Attestment Indicator is selected an additional page populates. This page contains a place for employees to sign the monthly time report. Some agencies require employees to physically sign each month for time worked and taken.
13.	Select Output CSV if the output is needed in an unformatted Excel format.
14.	Enter the desired information into the **Empl ID** field. Enter "**00000000022**".

Step	Action
15.	Save the information in one of two ways: (1) Click on Save, this is useful to change the Run Control Parameters. (2) Click Run. The Run Control ID will be saved with the information on the screen, and the process will be run.
16.	Click the **Run** button.
17.	Use the Process Scheduler Request page to enter or update parameters, such as report output type and format. For this report, no information needs to be updated.
18.	The report can be run at a different date and time by setting the Run Date and Run Time fields.
19.	The Description field helps to uniquely identify a process.
20.	The Process Name field displays the name of the process as it appears in the technical definition.
21.	This report will display in PDF unless the Output CSV is selected. Click the **OK** button.
22.	The report is now running. Notice a Process Instance number displays. This number identifies the process you have just run; you can check its status using Process Monitor.
23.	Click the **Process Monitor** link.
24.	The Process Instance number displays. It helps identify the report or process from others in the list.
25.	The current Run Status of this process displays as Processing. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
26.	Click the Refresh button until the screen shows Success and Posted. Click the **Refresh** button.
27.	Click the **Details** link.

Step	Action
28.	Click the **View Log/Trace** link.
29.	Click the link with the .PDF extension. Click the **htl00001_5492110.PDF** link.
30.	This report displays the balances for the employee. It also displays any leave that will be expiring within the next 3 months.
31.	The report can be printed as needed. Click the **Close** button.
32.	Click the **Return** button.
33.	Click the **Cancel** button.
34.	Click the **Home** link.
35.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Full Month of LWOP Time

Section 6, Exercises Scenario 2 - Full Month of LWOP Time

Procedure

Step	Action
1.	Click the **Texas Reports** link.
2.	Click the **Full Month of LWOP Time Rpt** link.

Step	Action
3.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
4.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
5.	If you have an established Run Control ID for this report, use that instead of adding a new value. For this example, a new value is added. Click the **Add a New Value** tab.
6.	In this example enter FullMonthLWOPpr to identify the name of the report and your initials. Enter the desired information into the **Run Control ID** field. Enter "**FullMonthLWOPpr**".
7.	Click the **Add** button.
8.	Use the Look up button to select the end of the month that you wish to view. Click the **Choose a date (Alt+5)** button.
9.	In this example, select Feb 1, 2015. Click the **February** list item.
10.	Click the **1** link.
11.	Click the **Choose a date (Alt+5)** button.
12.	For the Thru Date select Feb 28, 2015. Click the **February** list item.
13.	Click the **28** link.

Step	Action
14.	Enter the agency's ID number. In this example enter T32. Enter the desired information into the **Company** field. Enter "**T32**".
15.	Click the **Run** button.
16.	Use the Process Scheduler Request page to enter or update parameters, such as report output type and format. For this report, no information needs to be updated.
17.	The Description field helps to uniquely identify a process.
18.	The Process Name field displays the name of the process as it appears in the technical definition.
19.	Click the **OK** button.
20.	The report is now running. Notice a Process Instance number displays. This number identifies the process you have just run; you can check its status using Process Monitor.
21.	Click the **Process Monitor** link.
22.	The Process Instance number displays. It helps identify the report or process from others in the list.
23.	The current Run Status of this process displays as Processing. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
24.	Click the Refresh button until the screen shows Success and Posted. Click the **Refresh** button.
25.	Click the **Details** link.
26.	Click the **View Log/Trace** link.

Step	Action
27.	Click the link with the .PDF extension. Click the **astl1016_5492663.PDF** link.
28.	The report can be printed as needed. When finished reviewing the information, close the report. Click the **Close** button.
29.	Click the **Return** button.
30.	Click the **OK** button.
31.	Click the **Home** link.
32.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Running the TRCs by Date Report

Section 6, Lesson 1 Exercises, Scenario 3 - Running the TRCs by Date Report

Procedure

Step	Action
1.	Click the **Time and Labor** link.
2.	Click the **Texas Reports** link.
3.	Click the **TRCs by Date Report** link.

Step	Action
4.	Run Control IDs are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run.
5.	A Run Control ID cannot contain spaces. Use letters or numbers up to 30 characters long. Special characters are not allowed with the exception of the underscore.
6.	If you have an established Run Control ID for this report, use that instead of adding a new value. For this example, a new value is added. Click the **Add a New Value** tab.
7.	Enter the desired information into the **Run Control ID** field. Enter "**TRC report**".
8.	Click the **Add** button.
9.	The Process By group box generates the report with different criteria.
10.	Selecting the Process By Employee option displays the specified Time Reporting Codes, by Employee ID, by the specified dates.
11.	Selecting the Process By TL Group option displays the specified Time Reporting Codes, for a group of employees, by the specified dates.
12.	Selecting the Process By Bus Unit option displays the specified Time Reporting Codes, for the specified business unit within the agency, for the specified dates.
13.	Selecting the Process By DeptID option displays the specified Time Reporting Codes, for specified departments within the agency, for the specified dates.
14.	Selecting the Process By Company Summary option displays the specified Time Reporting Codes, for the entire agency, for the specified dates.
15.	For the example, the Process By selection is Employee. Use the Start date of Jan1. Click the **Choose a date (Alt+5)** button.
16.	Click the **1** link.
17.	Enter the desired information into the **End Date** field. Enter "**02/28/2015**".

Step	Action
18.	Enter the desired information into the **Time Reporting Code** field. Enter "**REGHR**".
19.	To add additional Time Reporting Codes, click the **Add a Row** button.
20.	Type the next Time Reporting Code (TRC) or use the Look up button to add the additional TRC. Click the **Look up Time Reporting Code (Alt+5)** button.
21.	Filter the list by entering the first letter of the TRC. Enter the desired information into the **Time Reporting Code** field. Enter "**s**".
22.	Click the **Look Up** button.
23.	For this example, select the Sick Leave Pool Awarded TRC. Click the **SCKPA** link.
24.	Next enter or select the Empl ID for this report. Click in the **Empl ID** field.
25.	Enter the desired information into the **Empl ID** field. Enter "**00000000022**".
26.	Add additional employees by adding a row and entering their Empl ID.
27.	Click the **Run** button.
28.	Use the Process Scheduler Request page to enter or update parameters, such as report output type and format. For this report, no information needs to be updated.
29.	Click the **OK** button.
30.	The report is now running. Notice a Process Instance number displays. This number identifies the process you have just run; you can check its status using Process Monitor.

Step	Action
31.	Click the **Process Monitor** link.
32.	The Process Instance number displays. It helps identify the report or process from others in the list.
33.	The current Run Status of this process displays as Processing. The process will be finished when the **Run Status is Success, and the Distribution Status is Posted**.
34.	Click the Refresh button until the screen shows Success and Posted. Click the **Refresh** button.
35.	Click the **Details** link.
36.	Click the **View Log/Trace** link.
37.	Click the link with the .PDF extension. Click the **txtl0024_5492125_1.PDF** link.
38.	This report displays the requested information and can be printed as needed. Click the **Close** button.
39.	Click the **Return** button.
40.	Click the **Close** button.
41.	Click the **Home** link.
42.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Running the Comp Balances by Employee Query

Section 6, Lesson 1 Exercises, Scenario 4 - Running the Comp Balances by Employee Query

Procedure

Some information can be viewed as a Query. Some of the Reports have been created as both a Report and a Query so that they can be run in Excel allowing the requestor to sort and modify the data as needed.

Step	Action
1.	Click the **Reporting Tools** link.
2.	Click the **Query Viewer** link.
3.	All of the Time and Labor queries will begin with TX_TL. The queries will be listed alphabetically. Enter the desired information into the **begins with** field. Enter "**TX_TL**".
4.	Click the **Search** button.
5.	Additional queries may be added or removed from the database. Use the arrow buttons to navigate through the list, or click the View All link to see the entire list on one page.
6.	Queries can be run in HTML, XML, or Excel. The HTML and XML formats can be viewed on the monitor. This is useful for displaying information in a quick manner. Queries can also be run to Excel which puts the requested information into an Excel spreadsheet. The spreadsheet can be sorted, printed, and saved as needed.
7.	Queries can also be added as a Favorite. When a query is selected as a favorite, it will display on the original Query Viewer Search page. This will make navigation easier.
8.	In this example, run the Comp Balances by Employee query to Excel. Click the **Excel** link.

Step	Action
9.	Enter the Empl ID for the employee you wish to view. Enter the desired information into the **Empl ID** field. Enter "**00000000029**".
10.	Click the **View Results** button.
11.	Click the **Open** button.
12.	The results will display in a formatted Excel spreadsheet. Click the scrollbar.
13.	All of the available options, such as save, sort, and print are available. Click the **Close** button.
14.	Click the **Close** button.
15.	Click the **Home** link.
16.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Glossary

Business Unit
Business Unit is a business level between Company (Agency) and Department for reporting and operations.

A Business Unit value is typically the Agency Number appended with two additional characters (*e.g.,* 30400).

Company
Company is a top-level designator. It is equivalent to Agency Number.

ESS
ESS stands for Employee Self Service.

HTML
HTML stands for HyperText Markup Language. It is a text description language used for publishing content on an internet web site.

MSS
MSS stands for Manager Self Service.

Query
A Query is an interactive tool used to gather information or data from the CAPPS system. Queries are already formulated, and you run them when you need them. The answers are shown in a browser window; alternatively, you can download the data into an Excel spreadsheet.

Run Control ID
A Run Control ID is an identifier that, when paired with a User ID, uniquely identifies a process that is running. The Run Control ID defines parameters or criteria that are used when running the process.

Warning Message
A warning message alerts of a potential data entry error or change. It does, however, allow updates to be saved.

XML
XML stands for Extensible Markup Language. It is a text-based formatting language used to share data on internet and intranet web sites.