eSTART

Course Guide for Managers

October 2020

General Information about this Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

Table of Contents

Getting Started

Importance and Benefits of eSTART

It is important that your employees are compensated accurately. To make this happen, you need to manage employees worked and non-worked hours, as well as attendance issues, in an efficient and timely manner. The application supports your ability to perform these tasks so that the data sent to payroll is accurate.

eSTART provides the following benefits to the State of Alabama:

- Provide system-wide accountability in time and labor management.
- Provide up-to-date accrual balances and projections.
- Assists with standardization and accuracy of payroll process.
- Provide employees access to their leave balances.
- Eliminate manual processes ensuring cost and paper reduction.

Roles and Responsibilities

Each employee and manager have responsibilities that are important in the payroll process. Each person's role determines the responsibilities and tasks that he or she performs in the application.

Common Employee Tasks

Daily or on an as-needed basis, employees perform the following tasks:

- Enter time data using a clock device or PC.
- Request time off.
- Review and approve timecard each pay period.
- Review schedules, punches, and leave accruals.
- View Inbox.
- Request extended leave cases.
- Request time off for an open and approved extended leave case.
- Provide required leave documentation.
- Submit requests for additional leave, as needed.

Common Manager Tasks

Daily, managers perform the following tasks:

- Check for timecard exceptions and make edits when applicable.
- Handle unexpected absences and missed time.
- Enter non-worked time for employees.
- Make schedule changes.

Once a pay period or on an as-needed basis, managers perform the following tasks:

- Schedule employees for a specific time period.
- Monitor timecards and reports to facilitate payroll processing.
- Review and approve timecards.
- Request backup coverage.
- Manage time off requests.
- Initiate extended leave case for employee.
- Create personal HyperFind queries.
- Monitor extended leave events through leave views.
- Enter hours for employees' extended leave cases.
- Submit an extended leave case for an employee.
- Run leave reports.

Common Agency Administrator Tasks

Once a pay period or on an as-needed basis, additional Agency Administrator tasks include:

- Sign off timecards.
- Perform final audit of time records.
- Add specific pay codes to employee timecards.

Common Leave Administrator Tasks

Once a pay period or on an as-needed basis, additional Leave Administrator tasks include:

- Determine eligibility and open leave cases.
- Administer open leave cases, including documentation.
- Enter hours for employees’ continuous leave cases.
- Run leave reports

Common State Administrator Tasks

Once a pay period or on an as-needed basis, additional State Administrator tasks include:

- Run reports.
- View/Update People records.

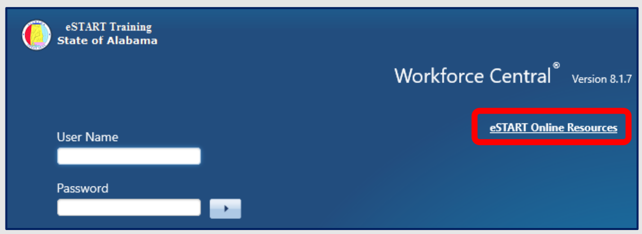
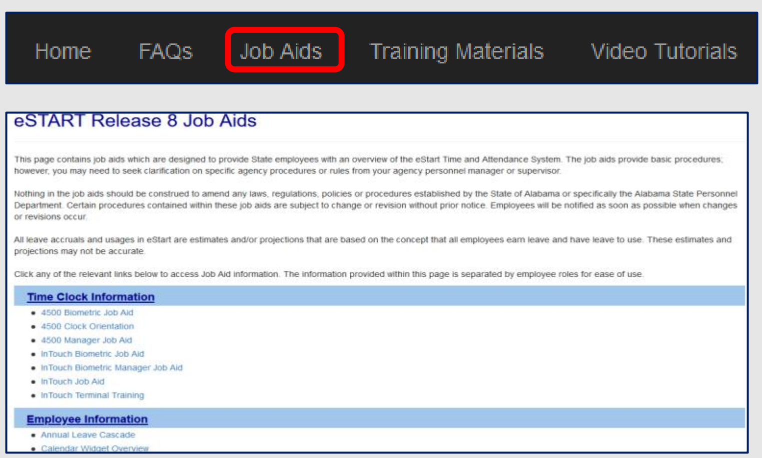
eSTART Online Resources Link

The eSTART log on page provides access to all the features of the eSTART application where you perform your time and attendance tasks. In addition, there is a link to the **eSTART Online Resources** site for access to helpful resources.

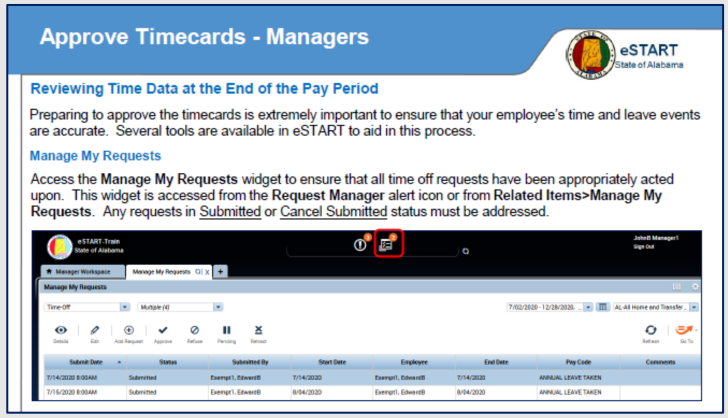
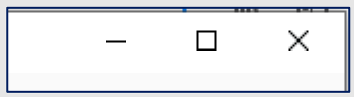
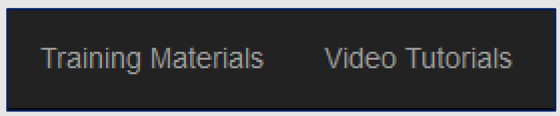
<u>eSTART Online Resources site</u>

The link to the **eSTART Online Resources** site is located on the right side of the log on page. This site contains training and support information, such as job aids, training videos, course guides, etc.

Exercise

Steps		
1	Click the **eSTART Online Resources** link.	
2	The site opens to the FAQ page where answers to certain questions can be found.	
3	There are menu options across the top of the page for accessing Job Aids, Training Materials and Video Tutorials. Click **Job Aids.** **Job aids** are quick reference guides which provide step-by-step instructions. Scroll down on the page to see the available job aids, sorted by role.	

Steps

4	Find the **Manager Information** section and click on **Approve Timecard.** The selected job aid opens in Adobe Acrobat Reader or a browser window and may be viewed, saved or printed if needed.	
5	Close the job aid by using the "**X**" in the top right corner of the page.	
6	If needed, you may select **Training Materials** for the course guides or **Video Tutorials** to view videos based on eSTART role.	
7	Close the **eSTART Online Resources** tab in your browser.	

Logging On

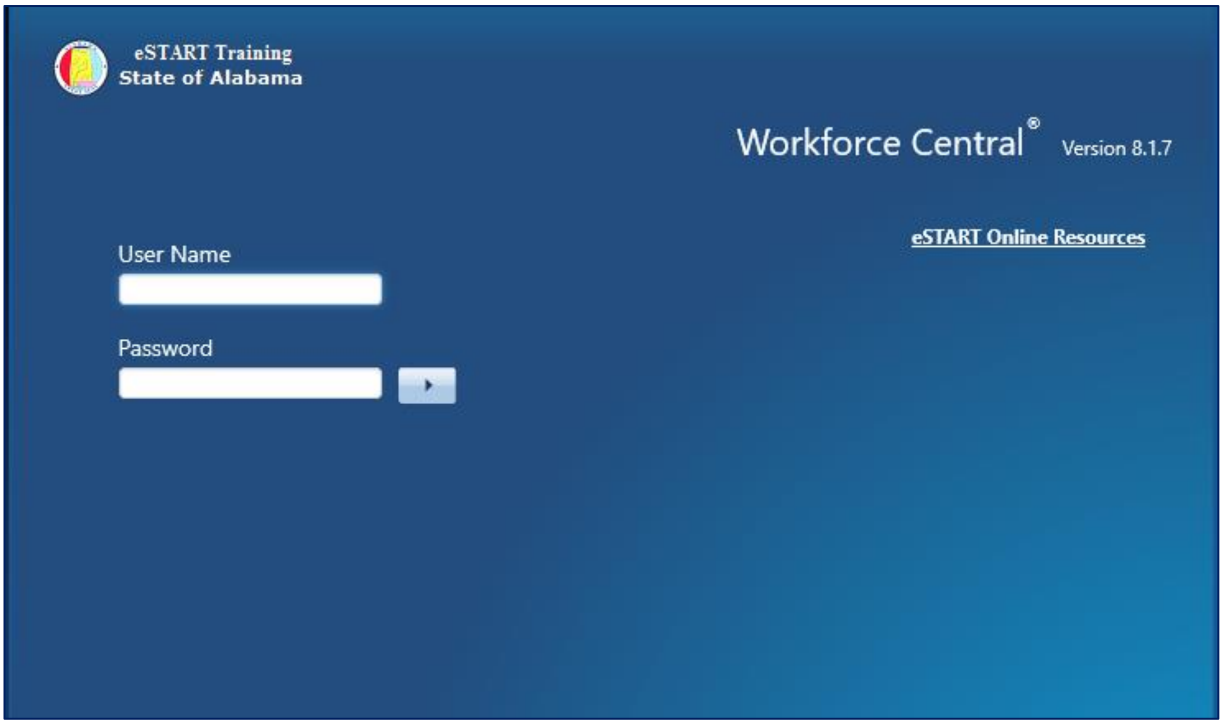
User Name and Password

If you use a computer and log on to the State's network, your User Name and Password will be the same as used to log into that network for the eSTART system. This is usually your full email address: **firstname.lastname@agency.alabama.gov**.

If you do not have a network ID, your User Name will be provided by your Agency Administrator. The User Name will ordinarily be **firstname.lastname.** An initial password will also be provided that must be changed at first logon.

Exercise

You, as a manager, log on to the eSTART application to review and work with your employees' timecards and scheduling data. It is a best practice to review this application each workday.



Steps	
1	Access the eSTART log on page.
2	Enter your user name and password in the designated fields.
3	Click the **Log On** button or press the **Enter** key on the keyboard.

NOTE
The URL for the eSTART production application is below. You may create a desktop shortcut or add to Favorites list for quick access.

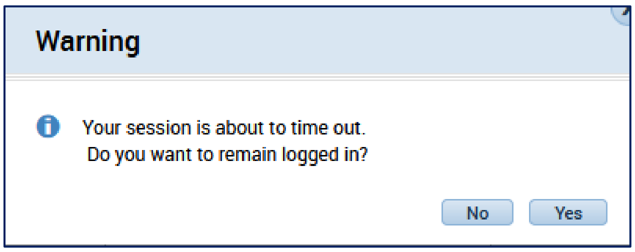
https://estart.alabama.gov/wfc/htmlnavigator/logon

The Inactivity Timeout and Signing Out

eSTART provides security to prevent other people from accessing your information. It also helps keep your employees' information confidential.

Regaining access after the inactivity timeout

The inactivity timeout protects sensitive information in the application. If the application does not detect activity within a specific amount of time, it attempts to automatically log you off. To regain access to the application, you must click **Yes** to remain logged in.



Best Business Practice

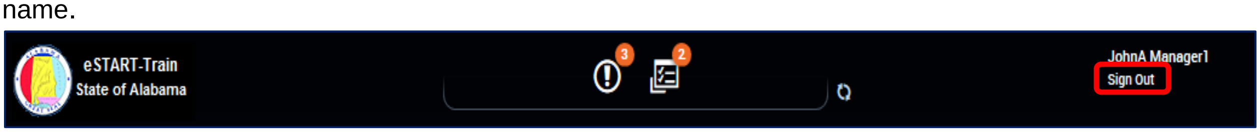
The inactivity timeout message displays if there is no activity for 30 minutes.

Caution

If you do not click **Yes** after receiving the inactivity timeout, you are logged out of the application. You will lose all unsaved edits.

Signing Out of eSTART

Upon completion of your tasks, you must sign out of eSTART to ensure that your employees' information remains confidential. The **Sign Out** link is located on the upper right side of the page below the user name.



Tip

eSTART is a browser-based application. However, you should not use the browser's navigation controls—the Back button on the toolbar, for example. Only use the links inside of eSTART to do your work.

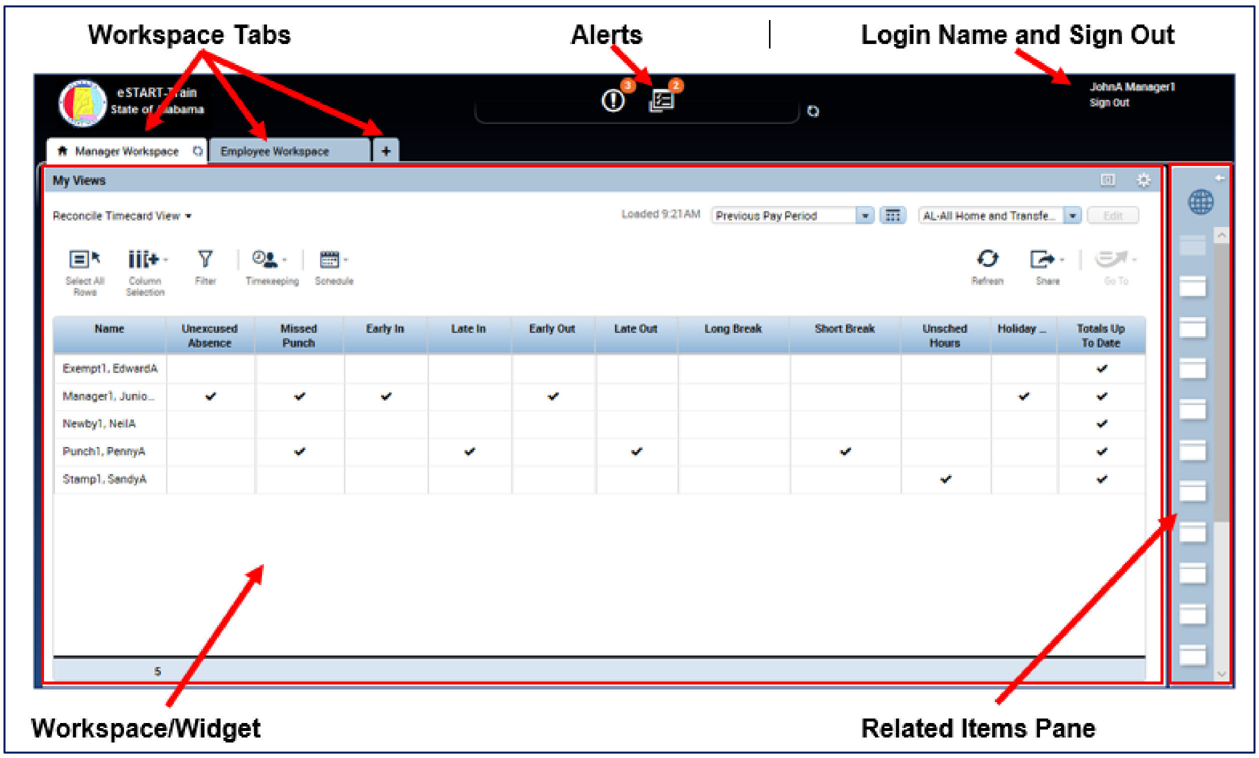
Navigating eSTART

Introducing the Navigator

After you log on to eSTART, your Navigator pane displays. The Navigator is a customized view of the time and labor information that is important to completing your daily work tasks. It is designed to be simple with easy-to-use views. You should take a few minutes to get acquainted with its navigation features.

Navigator Components

The Navigator consists of four main components: **Alerts**, **Workspace** tabs, **Widgets** and the **Related Items** pane.

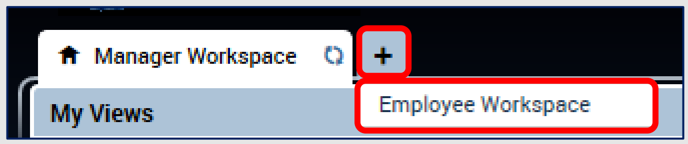
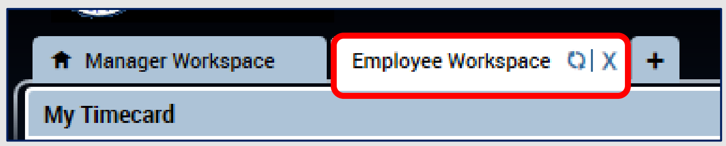
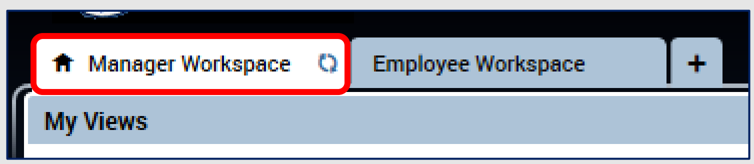
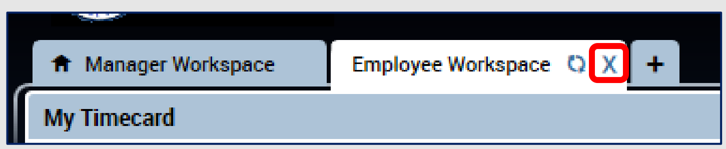


Workspace Components	Description
Alerts	Your Navigator contains two alerts, Exceptions and Requests, which have been configured to notify you when specific events or conditions occur. Because the alerts always display in your Navigator, you will know immediately if something requires your attention.
Workspace tabs	Your Navigator contains two other workspaces. A workspace is a layout designed to accommodate a specific business need. The manager workspace is the default or “home” workspace. Access the employee workspace from the **Add Workspace (+)** tab when needed.
Widgets	Widgets are self-contained components within a workspace that are used to access specific eSTART information or tasks.
Related Items pane	Widgets that are available, but not displayed in the selected workspace are accessed via the Related Items pane. They may be clicked and dragged into an open workspace or clicked to open the widget in a temporary workspace.

Viewing Workspaces

Your Navigator is configured to provide more than one workspace. The default workspace for Managers is the Manager workspace, but you may select your Employee workspace when needed. This workspace displays your individual timecard, calendar and leave functions.

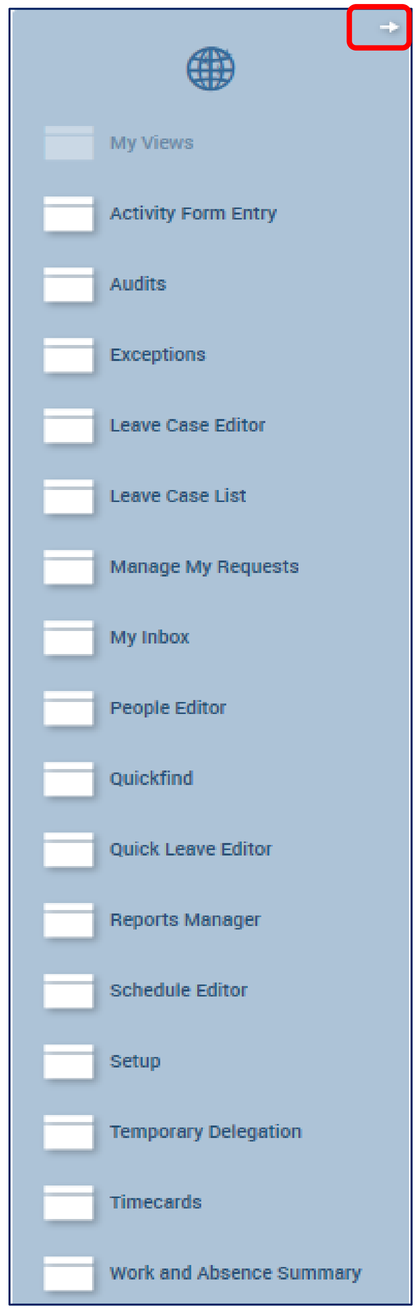
Example

Steps		
1	To open the **Employee Workspace**, click the **<u>Add Workspace (+)</u>** tab and choose **Employee Workspace**.	
2	The Employee workspace opens in a separate tab.	
3	After selecting the workspace, you may switch to a different workspace by selecting the associated tab. Note that your home workspace will be indicated by a 🏠 in the tab. The refresh button is used to refresh the page.	
4	To close a workspace, click the **X** on the tab. The refresh icon may be used to refresh the page.	

The Related Items pane

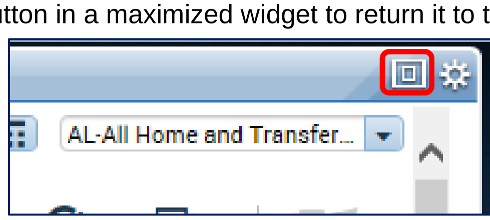
Widgets that are available but not displayed in the selected workspace are accessed via the **Related Items** pane. They may be clicked or dragged into an open workspace or clicked to open the widget in a temporary workspace.

- Click the arrow in the upper-right corner to open and close the **Related Items** pane.
- Use the scroll buttons at the top or bottom of the pane to view additional widgets within the pane.



Managing Open Widgets

To maximize a specific widget to fill the workspace, click the **Maximize** button in the upper right-hand corner of the widget. Click the same button in a maximized widget to return it to the default widget size.



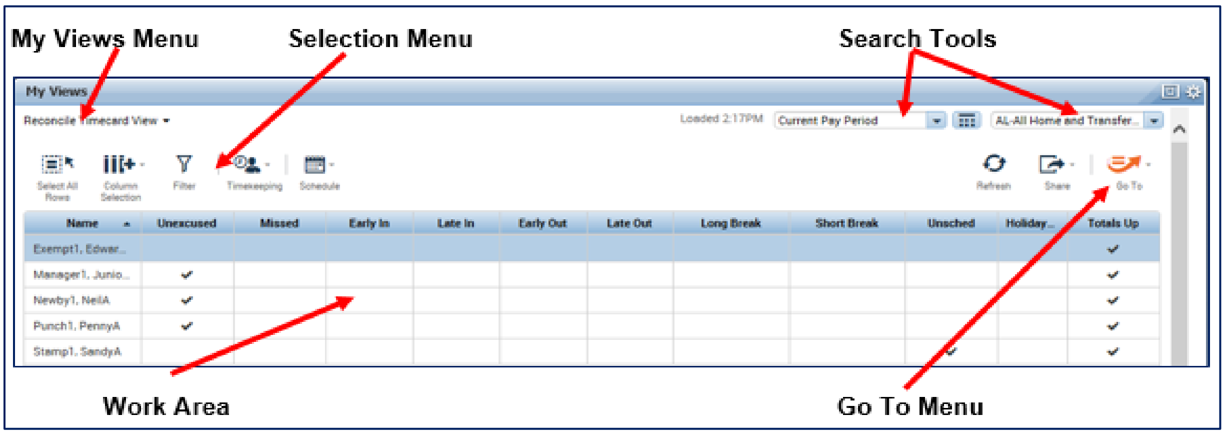
Editing Time Data for Non-Exempt Employees

Accessing and Viewing Employees' Timecards

When non-exempt employees forget to punch, or punch in early or late, their pay may be impacted. Therefore, it is your responsibility to resolve any discrepancies to ensure that employees are paid correctly. In addition, unresolved missing punches may delay payroll processing. The **Reconcile Timecard View** allows you to recognize and resolve the most common types of exceptions. From **Reconcile Timecard**, you may open employees' timecards and make any needed adjustments prior to payroll processing.

Common Areas of eSTART Pages

Before exploring employee timecards, it is important to note that eSTART pages contain five common areas that are used to quickly access different functions: My Views Menu, Selection Menu, Search Tools, the Work area, and the Go To Menu.



Areas	Description
My Views Menu	Allows you to access employee information in summarized, easy-to-read formats.
Selection Menu	Allows you to Select All employees, temporarily edit the columns that display, filter the data in the view, add or delete pay codes or access schedules. On the right side of the page is a Refresh button and a Share button to print the page or export data.
Search Tools	The Time Period drop-down allows you to select the timeframe for which you want to view schedules and timecard data. There is also a **Range of Dates** icon to set your own time frame as well as a Show drop-down for selecting the group of employees to view.
Work Area	The work area contains detailed information about the employees in the selected time period, as well as the action bar, which contains selections for modifying data.
Go To Menu	Allows you to quickly jump to other widgets to view or edit employee information.

NOTE

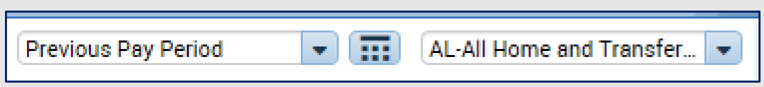
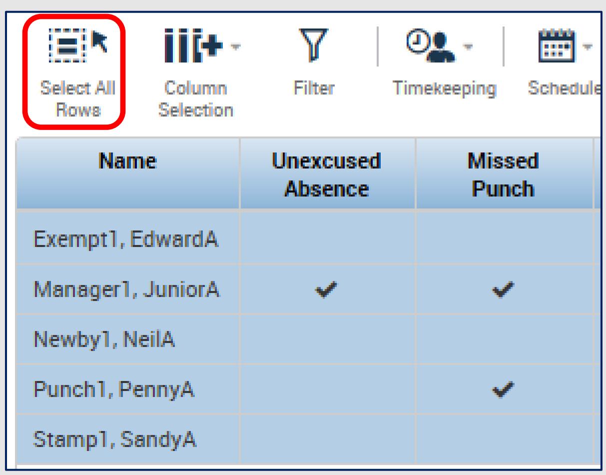
Reconcile Timecard View is one of two places in eSTART where employee exceptions may be edited. The second is the **Exceptions** widget which will be covered in a later module.

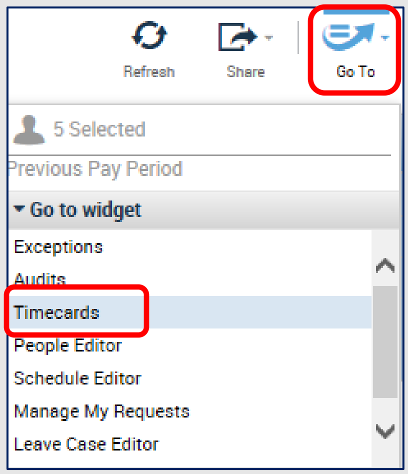
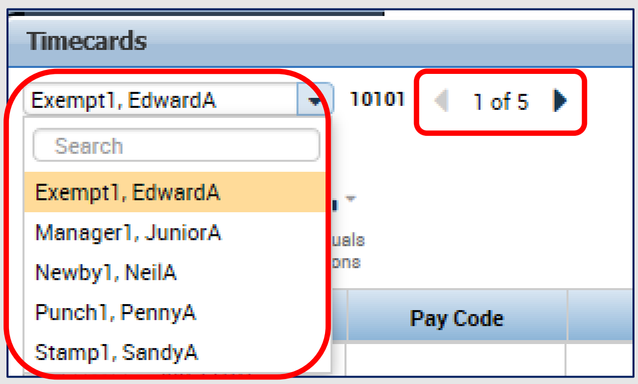
The **Reconcile Timecard** page shows a quick view of existing exceptions. Each exception displays in a separate column and if the exception is present in the timecard, a check mark displays. A description of each exception is below.

Exception Type	Description
Unexcused Absence	Employee is scheduled to work but did not punch in at all.
Missed Punch	The employee did not punch in or out either for lunch or at the end of the day. In other words, their punch is missing.
Early In	Employee punched in early.
Late In	Employee punched in late.
Early Out	Employee punched out early.
Late Out	Employee punched out late.
Long Break	Employee took a long lunch break.
Short Break	Employee took a short lunch break.
Unscheduled Hours	Employee punched in but is not scheduled to work.
Holiday Skipped	Non-exempt employee who did not work the scheduled day before and scheduled day after a holiday.

Exercise

In reviewing **Reconcile Timecard**, you notice that several employees have time and attendance exceptions. Open each employee's timecard to review and adjust the data.

Steps		
1	From the Time Period drop-down list, select **Previous Pay Period**. The Show drop-down defaults to **All Home and Transferred-In**.	
2	Select all employees using the **Select All Rows** icon. See **Tip** following the exercise for additional selection methods.	

Steps		
3	Click **Go To>Timecards.** **NOTE:** The **Timecards** link is also available from the **Related Items** pane.	
4	If you selected more than one employee, do one of the following: • Click the **Next** scroll button to move to the next employee. You may use the **Previous** scroll button to move to a previous employee. • Select an employee from the **Name** drop-down list.	

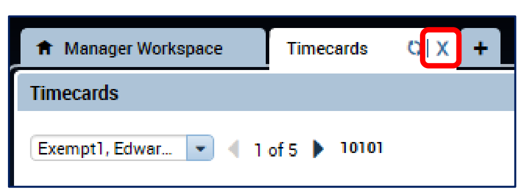
Tip

There are various ways to select employees in an eSTART widget:

- Hold the **Ctrl** key and click your mouse to select more than one employee in the listing.
- To select a group of employees listed together, use one of these methods:
  - Click the first employee, then hold the **Shift** key and click your mouse to select the last employee. This will select all employees in-between.
  - Click and drag the mouse to select multiple employees.
  - Choose the **Select All Rows** icon to select all employees.

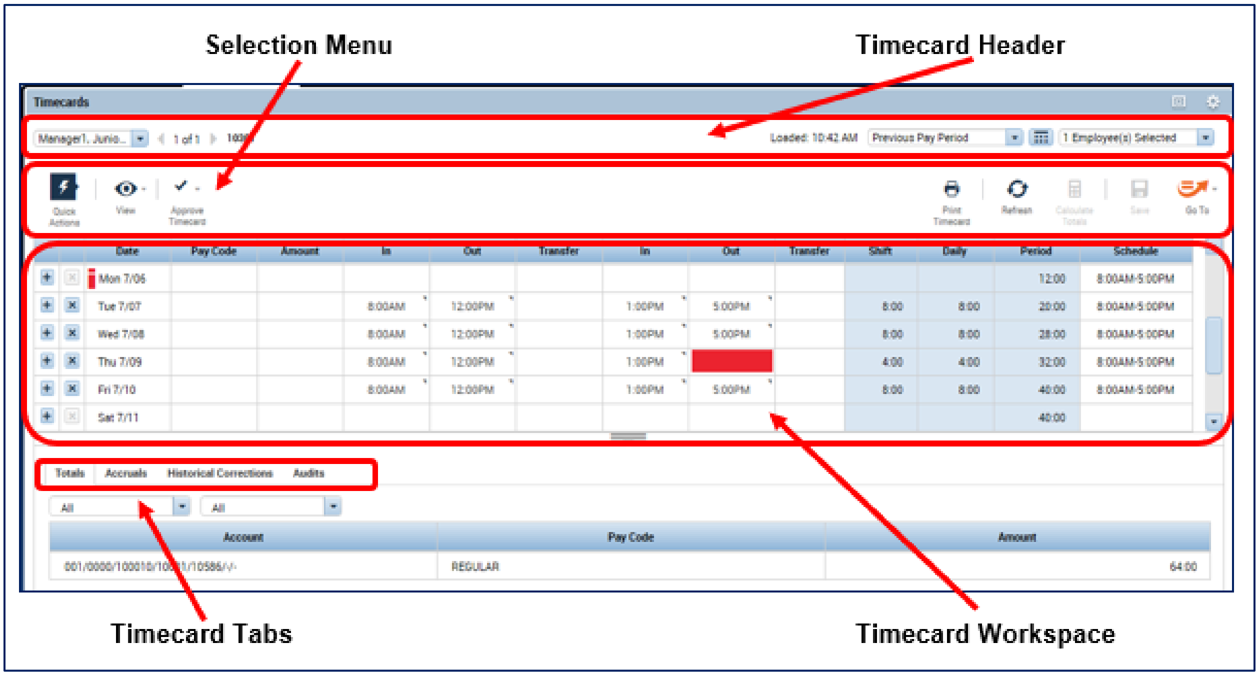
Tip

To return to the Reconcile Timecard widget from an open timecard, click on the **Manager Workspace** tab or close the **Timecards** tab using the **X.**



Non-Exempt Timecard Overview

There are four main areas on a timecard: Selection Menu, Timecard Header, Timecard Tabs and Timecard Workspace.



Timecard Area	Description
Selection Menu	Provides selections for performing timekeeping tasks.
Timecard Header	Displays the selected employee's name and ID, as well as the time period.
Timecard Workspace	Displays the following information: • Grid containing dates for the selected time period. • Time entry totals, including shift, daily, and cumulative hours. **Shift Total** - Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes). **Daily Total** - Calculated total hours of the selected day, including pay codes. **Period** - Cumulative total up to and including the selected day. • **Schedule -** The employee's schedule for the day.
Timecard Tabs	Display additional information about how eSTART tracks employee hours. Four default tabs display: • **Totals** -Displays the timecard totals. • **Accruals** - Displays accrual codes and available leave balances based on the date selected. • **Historical Corrections** - Displays historical correction information. • **Audits** - Displays audit trail information.

Visual Indicators

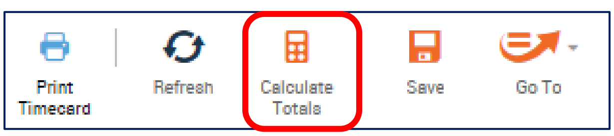
Visual indicators display on a timecard when an exception occurs. For example, an employee might forget to clock in or out, which causes a missed punch exception. An employee might clock in early or late, which causes a punch exception.

Pay Code	Amount	In	Out	Transfer	In	Out	Transfer	Shift	Daily	Period	Schedule
SICK LEAVE TAKEN	8:00	8:00AM							8:00	8:00	
		8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00	8:00AM-5:00PM
		7:00AM	11:00AM		12:00P...	4:00PM		8:00	8:00	24:00	8:00AM-5:00PM
		8:00AM	12:00PM		1:00PM			4:00	4:00	28:00	8:00AM-5:00PM
		8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	36:00	8:00AM-5:00PM

Visual Indicator	Description
Blue indicator on punch	An excused absence for the day, such as Annual Leave, Sick Leave, or Holiday
Red indicator on date	An unexcused absence for the day
Red indicator on punch	An exception, such as a late or early punch, or a short or long break
Green indicator on punch	Exception has been marked as reviewed
Solid-**red** cell	A missed punch
Purple text	A transaction that was added by the eSTART application
Blue comment indicator	One or more comments are attached to the punch

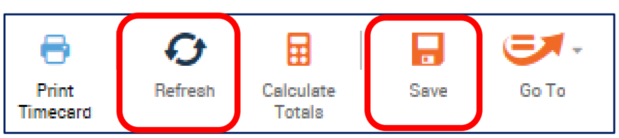
Calculating Totals

To see the effects of a change on the employee's time before saving, use the **Calculate Totals** feature on the Selection Menu below.



Refreshing and Saving Data in Timecards

When you add and modify timecard data, eSTART displays your edits but does not save them automatically. You must tell the application to save the data by selecting the **Save** button. If you do not wish to save the data, use the **Refresh** button to restore the original data.



Marking/Unmarking Exceptions as Reviewed

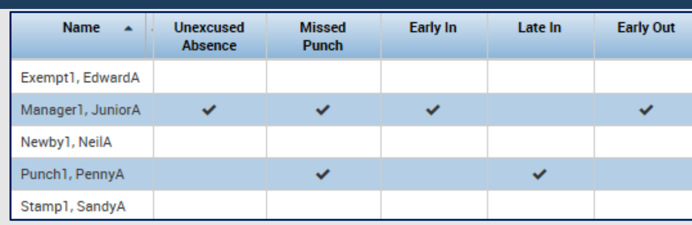
Once you have reviewed an exception and resolved it, you may mark the exception as reviewed. The exception will remain visible in the timecard, but the red indicator will change to green. At any time, you may choose to unmark an exception as reviewed.

NOTE: Marking an exception as reviewed is optional.

Exercise

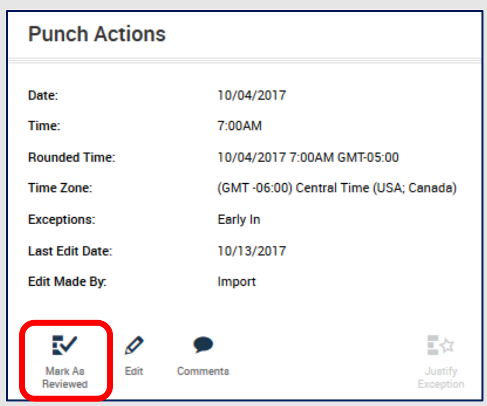
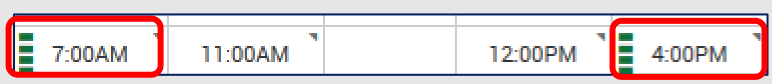
On Wednesday of the **previous pay period**, **Junior Manager** arrived early to work because he needed to leave early. Mark the exception as reviewed so it does not have to be checked again.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>From Reconcile Timecard, select Junior Manager and Penny Punch and access their timecards using the Go To menu.

NOTE: You may hold the Ctrl key and click to select more than one employee.</td><td>
<table>
<tr><th>Name</th><th>Unexcused Absence</th><th>Missed Punch</th><th>Early In</th><th>Late In</th><th>Early Out</th></tr>
<tr><td>Exempt1, EdwardA</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Manager1, JuniorA</td><td>✔</td><td>✔</td><td>✔</td><td></td><td>✔</td></tr>
<tr><td>Newby1, NeilA</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyA</td><td></td><td>✔</td><td></td><td>✔</td><td></td></tr>
<tr><td>Stamp1, SandyA</td><td></td><td></td><td></td><td></td><td></td></tr>
</table></td></tr>
<tr><td>2</td><td>From the timecard of Junior Manager, select the 7am punch.

To mark an exception as reviewed, right-click on the punch.</td><td></td></tr>
<tr><td>3</td><td>The Punch Actions window displays. Select Mark as Reviewed.

Repeat the process to mark the 4pm punch as reviewed.

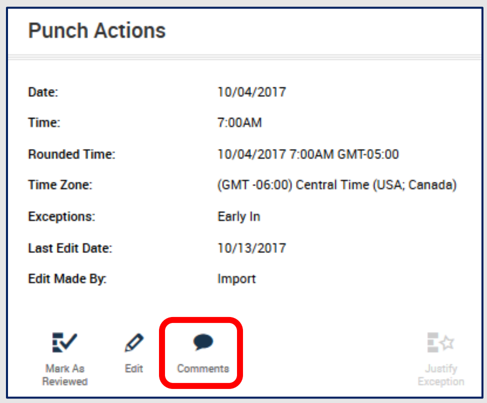
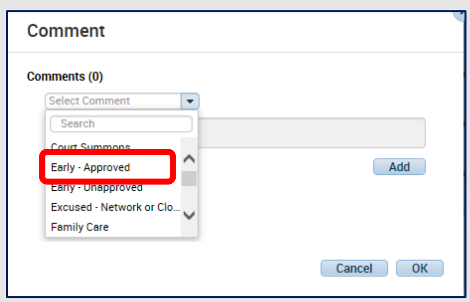
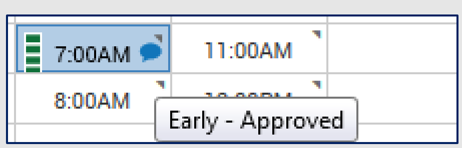
NOTE: To unmark an exception as reviewed, click Unmark as Reviewed.</td><td></td></tr>
<tr><td>4</td><td>Review the results. The red bar is now green.</td><td></td></tr>
<tr><td>5</td><td>Click the Save button.</td><td></td></tr>
</table>

Attaching Comments to Punches

Comments are predefined descriptive phrases you attach to a punch to provide additional, useful information about that transaction. You may attach as many comments as needed to explain the punch.

Exercise

On Wednesday of the **previous pay period**, **Junior Manager** arrived early to work because he needed to leave early. You have marked the exception reviewed. Now add a comment that the early arrival was excused. Attach an **Early-Approved** comment to the employee's **7:00 a.m**. punch.

Steps		
1	In the timecard, right-click the cell containing the exception.	
2	The **Punch Actions** window displays. Click **Comment**.	
3	Open the **Select Comment** drop-down list. From the list of comments, select **Early-Approved.** Click **OK.**	
4	Click the **Save** button.	
5	Confirm that the **blue** bubble icon displays in the timecard. Hover the cursor over the icon to view the comment.	

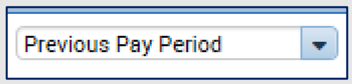
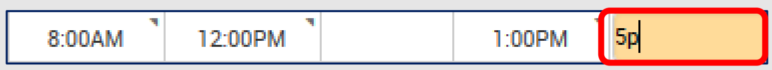
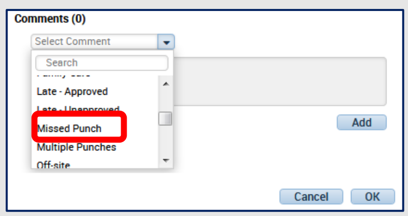
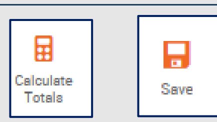
NOTE: To remove a comment, right-click on the field and select **Comments.** Click the **X** to the left of the comment to delete it.

Adding Missed Punches

When an employee forgets to punch in or out, a solid-red box displays in the timecard. To add the punch, click the cell and type the missed time.

Exercise

Junior Manager notified you that he forgot to punch out on the **second Thursday of the previous pay period**. The employee ended his shift at 5:00 p.m. Access the employee's timecard and add a **5:00 p.m. out punch** on the employee's timecard for the second Thursday of the previous pay period.

Steps		
1	Access the employee's timecard.	
2	Select **Previous Pay Period** from the Time Period drop-down list.	
3	Click the out-punch cell containing the missed punch exception. Type **5p** or **5pm** in the cell. **NOTE:** Always use the p or pm when keying time into a cell.	
4	Right-click the cell again and choose **Comments.** Select the **Missed Punch** comment. Click **OK.**	
5	Another option for adding a missing punch is available if the employee is <u>assigned to a schedule.</u> Open the **Quick Actions** icon and click **Add Missing Punch.** The cursor changes to a cross. Click in the cell of the missing punch and the out punch will populate. <u>This may only be used to populate a missed beginning or end of day punch.</u> Click the **Quick Actions** icon again to close the menu.	
6	Select **Calculate Totals** to ensure the changes you made are correct. Then **Save.**	

Best Business Practice

You **must** correct all Missed Punch exceptions on the timecards. Administrators will not have the ability to sign-off on the payroll until all missed punches are corrected.

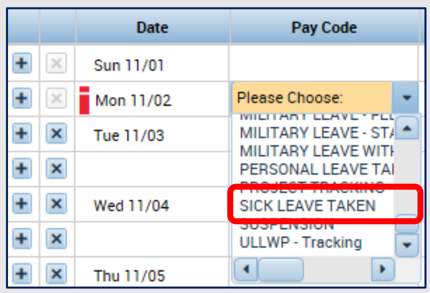
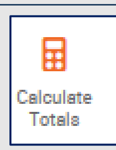
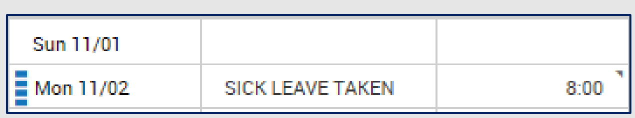
Adding Pay Code Hours to Timecards

Pay codes keep track of the type of worked and non-worked time that is entered in the timecard. Examples of pay codes include: Annual Leave, Sick Leave and Personal Leave Day.

It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and use a pay code to track his or her worked or non-worked time, for example, when the employee calls in sick.

Exercise

Junior Manager was sick on **Monday of the previous pay period**. His timecard was not updated and eSTART flags the date as an unexcused absence. Edit the employee's timecard for the **Previous Pay Period** to reflect the sick leave.

Steps		
1	In the timecard, select the **Sick Leave Taken** pay code from the **Pay Code** drop-down list.	
2	Click the **Amount** cell next to the pay code you selected. Enter the number of hours, using an acceptable format (chart below).	
3	Select **Calculate Totals** to ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.	
4	Once you have determined the timecard/hours are correct, select the **Save** button. **NOTE:** If the pay code edit excuses an absence, the red bar will change to blue.	 

NOTE

You cannot add a pay code to a row that contains punches. You must insert a separate row for the pay code transaction.

Acceptable Formats for Entering Pay Code Hours

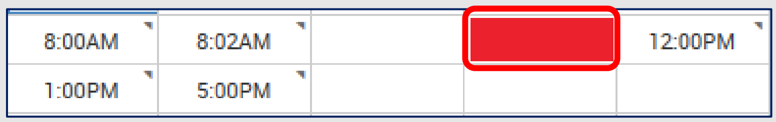
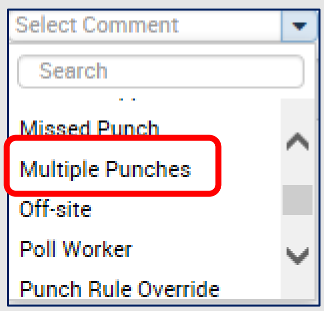
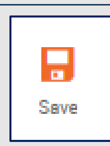
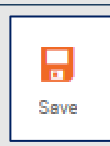
Acceptable Format	Example	Interpretation by eSTART
Leading zeroes (optional)	07	7:00 hours
Colon	7:30	7:30 hours **NOTE:** If you enter hours without a colon or a leading zero, eSTART interprets your entry as is, which may be a much larger number of hours than you intended. For example, if you enter 730 (without the colon or leading zero), eSTART interprets that as 730 hours.
Decimal	8.5	8:30 hours

Deleting Punches

As a rule, you should not change or delete punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. When this occurs, you should delete the extra punch. The **Audits** tab provides a record of all timecard edits, including any deleted punches.

Exercise

Penny Punch could not remember if she punched in at the beginning of her shift on the **second Monday of the previous pay period**. She punched in a second time to ensure that she recorded her start-of-shift time. While reviewing the employee's timecard, you notice that two in punches display for the employee's start of shift on Monday. You want to **delete the employee's second in punch of 8:02 a.m.**

Steps		
1	First, select the **8:02am** punch and add a comment for audit purposes.	
2	Right-click to open the **Punch Actions** window. Select the **Comments** icon, then open the **Select Comment** drop-down. Select **Multiple Punches**. Click **OK**.	
3	<u>**SAVE THE PAGE BEFORE DELETING THE PUNCH**</u>**.**	
4	Once the comment has been saved, click the **8:02am** cell.	
5	Press the **Delete** key on the keyboard to delete the punch. Press the **Tab** key.	
6	**Save** the change.	
7	The punches are now correct.	

Marking/Unmarking Exceptions as Reviewed

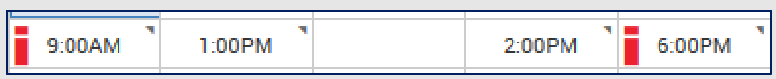
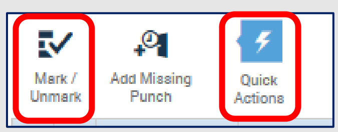
As discussed earlier, once you review an exception and resolve it you may mark the exception as reviewed. The exception remains visible in the timecard and in customized views, but no longer displays in exception reports or queries. Once the exception is marked as reviewed, a green bar displays in the cell containing the exception.

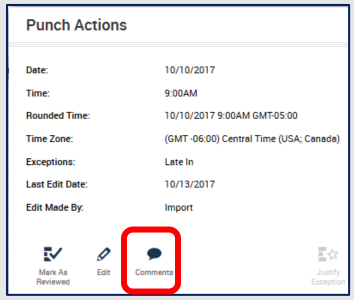
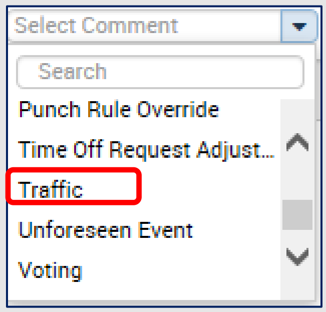
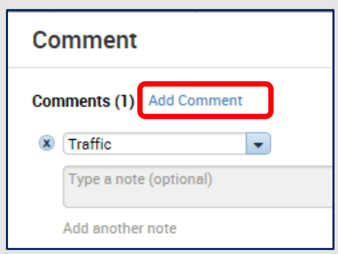
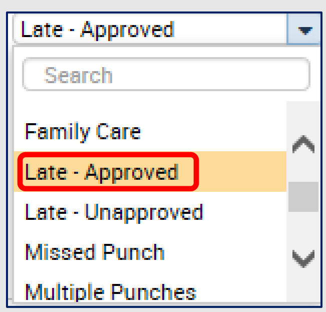
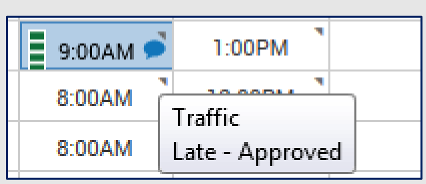
You may unmark an exception as reviewed at any time.

NOTE: This exercise demonstrates a second method that may be used to mark multiple punches as reviewed. Marking an exception reviewed is optional.

Exercise

On Tuesday, **Penny Punch** arrived late to work because of traffic. You want to mark the exception as reviewed so that you do not re-check it again later. She asked permission to work an extra hour in order to make up the time, which you approved. You may mark the late out exception as reviewed and add a comment to her 9:00 a.m. punch as a reminder of the reason for the late punch.

Steps		
1	In the timecard, there are two punches to be marked as reviewed.	
2	Open the **Quick Actions** icon. Select **Mark/Unmark**. The cursor changes to a cross. Click the first punch to change the red bar on the **9am** punch to green. Click the second punch to mark the **6pm** punch as reviewed. Click the **Mark/Unmark** icon again to change the cross back to the normal cursor. Click the **Quick Actions** icon again to close the menu. **NOTE:** To unmark an exception as reviewed, repeat the process. The green bar will be changed back to red.	 
3	Review the results.	
4	Add a **comment** to the **9am** punch by right clicking the punch again.	

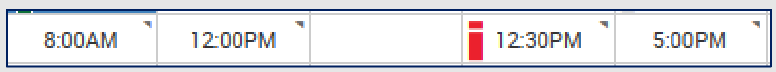
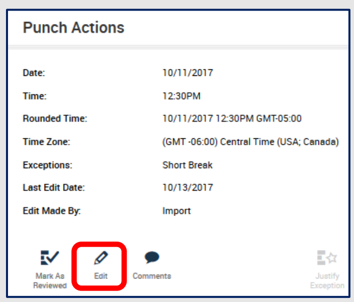
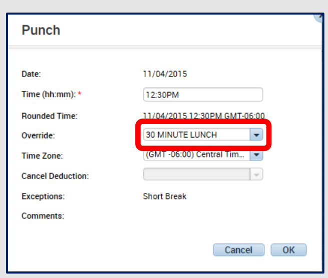
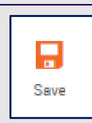
Steps		
5	The **Punch Actions** window displays. Click **Comments**.	
6	Open the **Select Comment** drop-down list. From the list of comments, select **Traffic.**	
7	To add an additional comment, select **Add Comment.**	
8	Then choose **Late Approved**. Click **OK.**	
9	Click the **Save** button.	
10	Confirm that the **blue** bubble icon displays in the timecard. Hover the cursor over the icon to view the comments.	

Overriding Punches

When employees punch in or out for their shifts, a punch may be misinterpreted by the system if a punch is missed during the day. An in punch may be interpreted as an out punch or vice versa. It is also possible that an exception related to a lunch break will also be applied if an employee takes a lunch break shorter than their assigned lunch rule. If a punch is incorrectly labeled or a lunch exception is incorrectly applied, you may override the punch to correct the error.

Exercise

You needed **Penny Punch** to return from lunch 30 minutes early on **Wednesday of the previous pay period**, but she normally receives a 60-minute lunch. The system recorded her return punch from lunch as a Short Break exception. To get rid of the exception for this circumstance, you may choose to override the exception.

Steps		
1	In the timecard, select the punch you want to override. Right-click the **12:30pm** punch.	
2	The **Punch Actions** window displays. Select **Edit.**	
3	The **Punch** window displays. Select **30 Minute Lunch** from the **Override** drop-down list. Click **OK.**	
4	Click **Save**.	

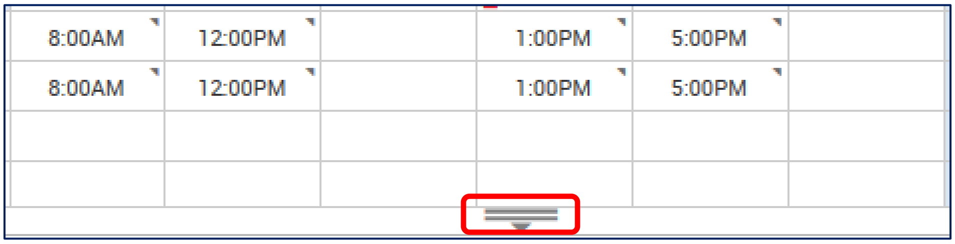
NOTE

Any overtime or compensatory time resulting from this type of exception should be managed according to Agency policy.

Totals Tab

The **Totals** tab displays the employee's worked and non-worked time for the pay period.

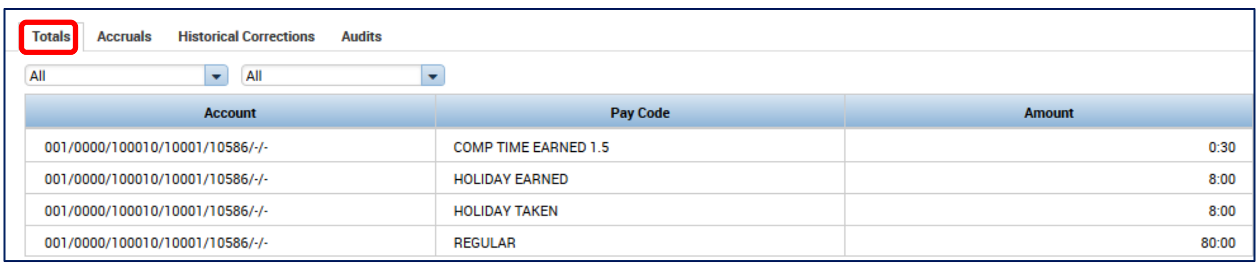
Click the gray tab in the lower section of the timecard view to expand the **Totals and Accruals** section of the timecard.



The **Totals** tab displays. The left drop-down box defaults to **All**, but may be changed to **Shift**, **Daily** or **Period to Date** to view totals as needed.

The right drop-down box defaults to **All** but may be changed to **Account** to display the **Account** column or **Pay Code** to hide the **Account** column.

The following illustration shows the **Totals** Tab.



Totals | Accruals | Historical Corrections | Audits

All | All

Account	Pay Code	Amount
001/0000/100010/10001/10586/-/-	COMP TIME EARNED 1.5	0:30
001/0000/100010/10001/10586/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10586/-/-	HOLIDAY TAKEN	8:00
001/0000/100010/10001/10586/-/-	REGULAR	80:00

Description of the columns in the **Totals** section:

Column	Description
Account	The labor level to which the employee is assigned. Further information may be found on this in the employee's People Editor. (Agency/Division/Work Location/Manager ID/Job Classification Code)
Pay Code	The pay code to which the worked or non-worked time is assigned. Any overtime or comp time will display here as well.
Amount	The number of hours earned or taken in each pay code.

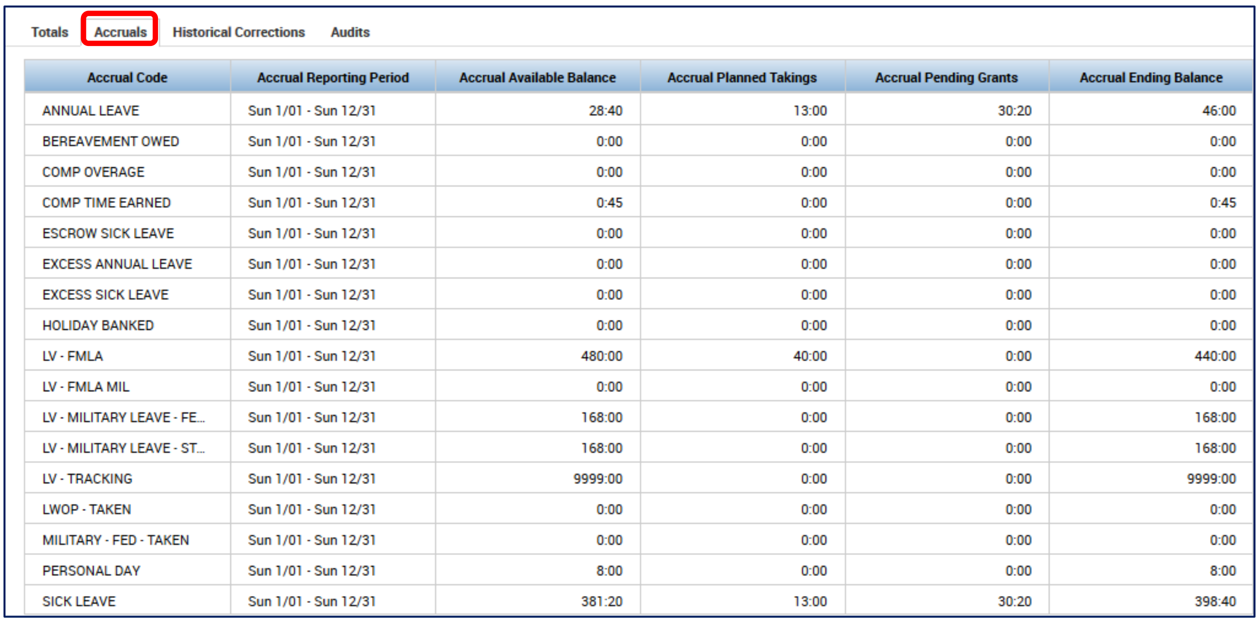
Accruals Tab

The **Accruals** tab displays the employee's accrual balances for each accrual code. You may quickly see up-to-date accrual balances, such as Annual Leave and Sick Leave.

The following illustration shows the **Accrual** tab.

Example

Review the leave balances for Penny Punch.



Totals | Accruals | Historical Corrections | Audits

Accrual Code	Accrual Reporting Period	Accrual Available Balance	Accrual Planned Takings	Accrual Pending Grants	Accrual Ending Balance
ANNUAL LEAVE	Sun 1/01 - Sun 12/31	28:40	13:00	30:20	46:00
BEREAVEMENT OWED	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
COMP OVERAGE	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
COMP TIME EARNED	Sun 1/01 - Sun 12/31	0:45	0:00	0:00	0:45
ESCROW SICK LEAVE	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
EXCESS ANNUAL LEAVE	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
EXCESS SICK LEAVE	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
HOLIDAY BANKED	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
LV - FMLA	Sun 1/01 - Sun 12/31	480:00	40:00	0:00	440:00
LV - FMLA MIL	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
LV - MILITARY LEAVE - FE...	Sun 1/01 - Sun 12/31	168:00	0:00	0:00	168:00
LV - MILITARY LEAVE - ST...	Sun 1/01 - Sun 12/31	168:00	0:00	0:00	168:00
LV - TRACKING	Sun 1/01 - Sun 12/31	9999:00	0:00	0:00	9999:00
LWOP - TAKEN	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
MILITARY - FED - TAKEN	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
PERSONAL DAY	Sun 1/01 - Sun 12/31	8:00	0:00	0:00	8:00
SICK LEAVE	Sun 1/01 - Sun 12/31	381:20	13:00	30:20	398:40

Column	Description
Accrual Code	The type of accrual balance, such as Annual Leave or Sick Leave.
Accrual Reporting Period	The leave reporting period (current year).
Accrual Available Balance	The accrual balance from the payroll system as of the date selected in the timecard.
Accrual Planned Takings	The total amount of time scheduled to be taken, from the date selected in the timecard through the end of the Reporting Period (12/31).
Accrual Pending Grants	The total accruals projected from the date selected in the timecard through the end of the Reporting Period (12/31). The projections assume the employee will work the appropriate number of hours to earn the accruals.
Accrual Ending Balance	The accrual balance as of December 31st, including Pending Accruals and Planned Usages.

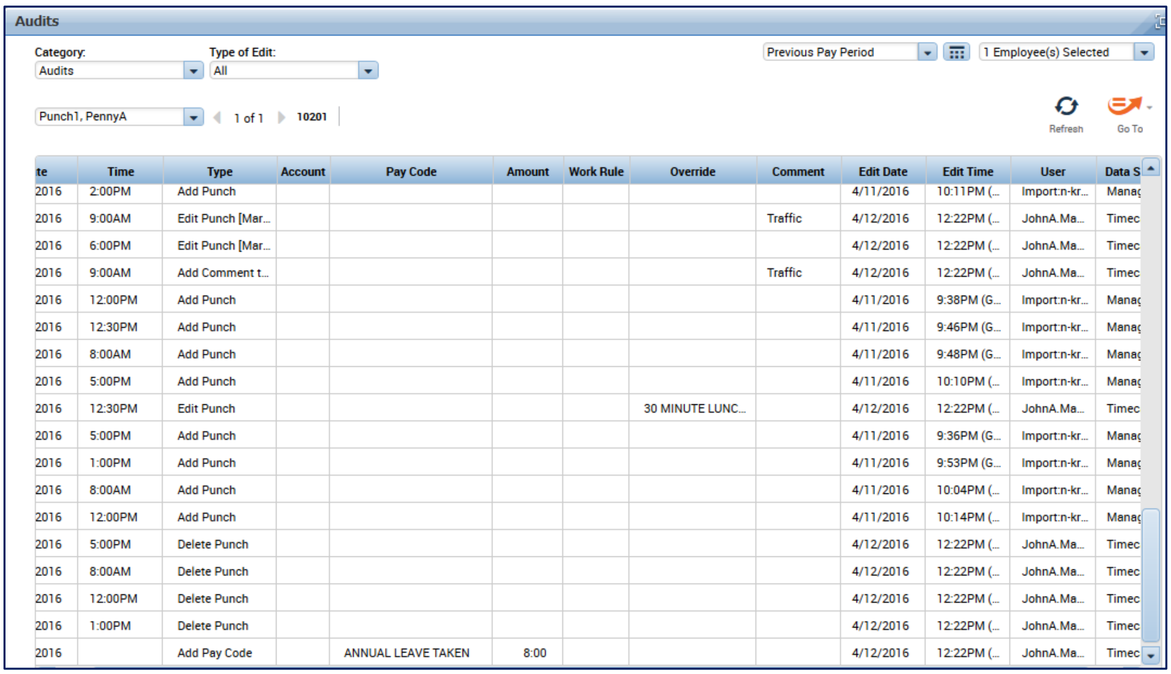
NOTE: The **Historical Corrections** tab is used to view historical corrections and the **Audits** tab displays audit trail information.

Viewing the Audits Widget

The **Audits** widget is located on the **Related Items** pane. It is also available from the **Totals** tab at the bottom of the timecard or from the **Go To** menu. **All timecard changes are logged here for audit purposes, including timecard approval.** The tab also lists punches made from timestamping. You may filter the data using the **Category** and **Type of Edit** drop-down lists.

Example

From the timecard of **Penny Punch** in the **Previous Pay Period**, select **Go To>Audits**. Review the changes made to Penny's timecard.



te	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time	User	Data S
2016	2:00PM	Add Punch							4/11/2016	10:11PM (...	Import:n-kr...	Manag
2016	9:00AM	Edit Punch [Mar...						Traffic	4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	6:00PM	Edit Punch [Mar...							4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	9:00AM	Add Comment t...						Traffic	4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	12:00PM	Add Punch							4/11/2016	9:38PM (G...	Import:n-kr...	Manag
2016	12:30PM	Add Punch							4/11/2016	9:46PM (G...	Import:n-kr...	Manag
2016	8:00AM	Add Punch							4/11/2016	9:48PM (G...	Import:n-kr...	Manag
2016	5:00PM	Add Punch							4/11/2016	10:10PM (...	Import:n-kr...	Manag
2016	12:30PM	Edit Punch					30 MINUTE LUNC...		4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	5:00PM	Add Punch							4/11/2016	9:36PM (G...	Import:n-kr...	Manag
2016	1:00PM	Add Punch							4/11/2016	9:53PM (G...	Import:n-kr...	Manag
2016	8:00AM	Add Punch							4/11/2016	10:04PM (...	Import:n-kr...	Manag
2016	12:00PM	Add Punch							4/11/2016	10:14PM (...	Import:n-kr...	Manag
2016	5:00PM	Delete Punch							4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	8:00AM	Delete Punch							4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	12:00PM	Delete Punch							4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016	1:00PM	Delete Punch							4/12/2016	12:22PM (...	JohnA.Ma...	Timec
2016		Add Pay Code		ANNUAL LEAVE TAKEN	8:00				4/12/2016	12:22PM (...	JohnA.Ma...	Timec

Column	Description
Date/Time	The original date/time of the entry.
Type	The type of edit that was performed.
Account	The account to which the edit is attributed, if different from the primary account.
Pay Code/Amount	The pay code and number of hours assigned, if applicable.
Work Rule	The work rule used with the edit, if different from the employee's primary work rule.
Override	The type of entry that this edit is replacing or canceling, if applicable.
Comment	The comment attached to the edit.
Edit Date/Time	The effective date and time of the edit.
User	The user name of the person who edited the transaction.
Data Source	The component of the application where the edit occurred.

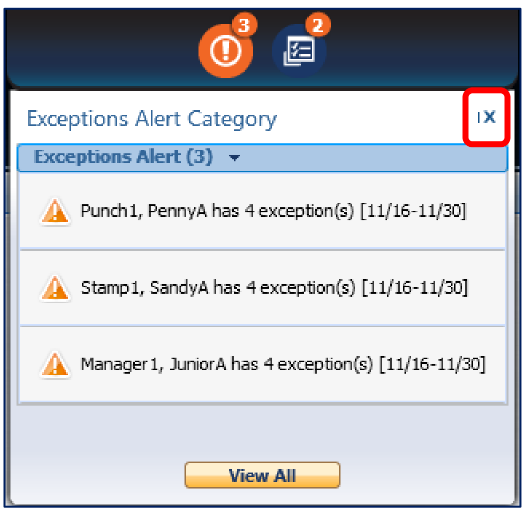
Editing Time Data Using the Exceptions Widget

Using the Exceptions Alert

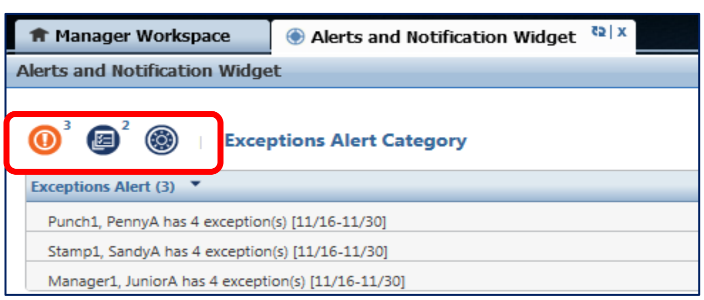
A second option for editing time data is available from the **Exceptions** widget. This widget is like the **Reconcile Timecard View** and may be used to edit exceptions in the timecard view.

Your Navigator is configured to receive exceptions alerts. If one of your employees has triggered a time exception that requires your attention, you will see an **Alerts** icon at the top of your Navigator when you log in.

Click the **Alert** icon to see a list of the exceptions. Select an employee from the list to view the details of the exception. The Exceptions widget displays. The **X** may be used to close the alert.



The **View All** button opens the Alerts and Notification Widget. This widget is used to view a history of alerts.



Once opened, the alert category may be changed from **Exceptions Alert** to **Request Manager Alert** by selecting the round icons on the widget. The icon changes to an orange color when selected. The third icon is for "uncategorized" alerts and is not used. Use the **X** to close the tab.

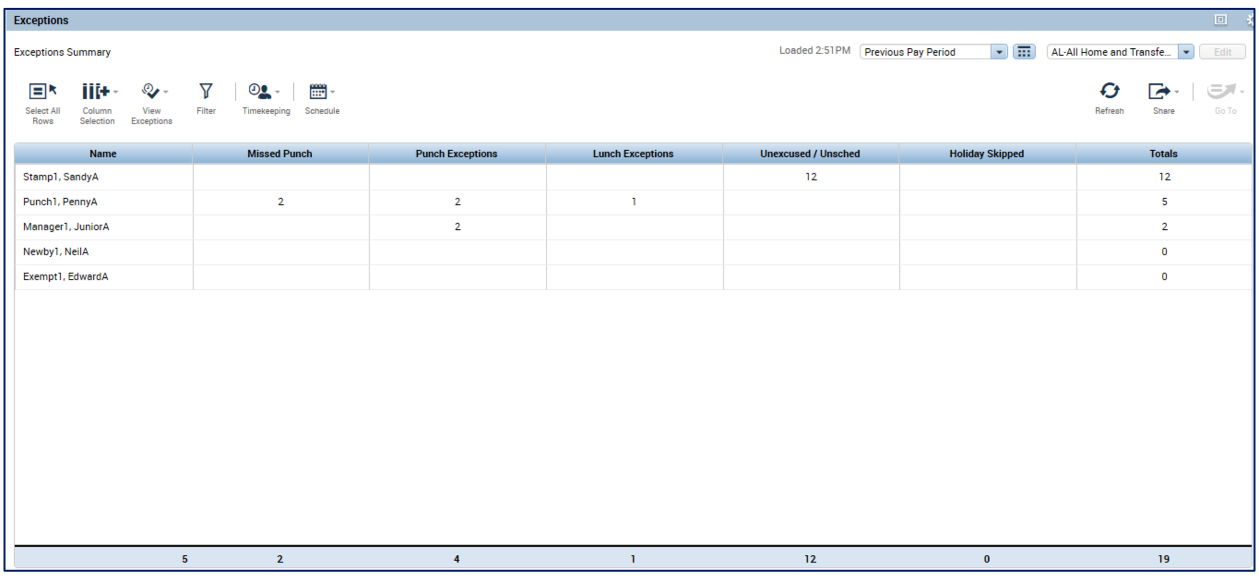
Viewing the Exceptions Widget

When non-exempt employees forget to punch, or punch in early or late, their pay may be impacted. Therefore, it is your responsibility to resolve any discrepancies to ensure that employees are paid correctly. In addition, unresolved missing punches may delay payroll processing. The **Exceptions** widget allows you to recognize and resolve the most common types of exceptions.

The Summary View

Select **Exceptions** from the **Related Items** pane. The **Exceptions Summary** page displays.

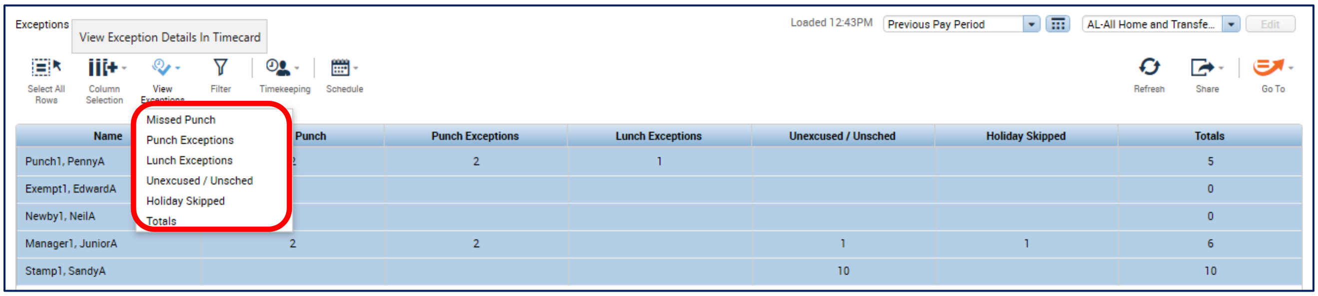
In the **Exceptions Summary** view, the widget displays a list of your employees for the time period and HyperFind selected at the top of the widget. It organizes the employee exceptions by type. The exception types displayed include missed punches, punch exceptions (such as late or early), lunch exceptions (short or long), unexcused or unscheduled hours, and holiday skipped.



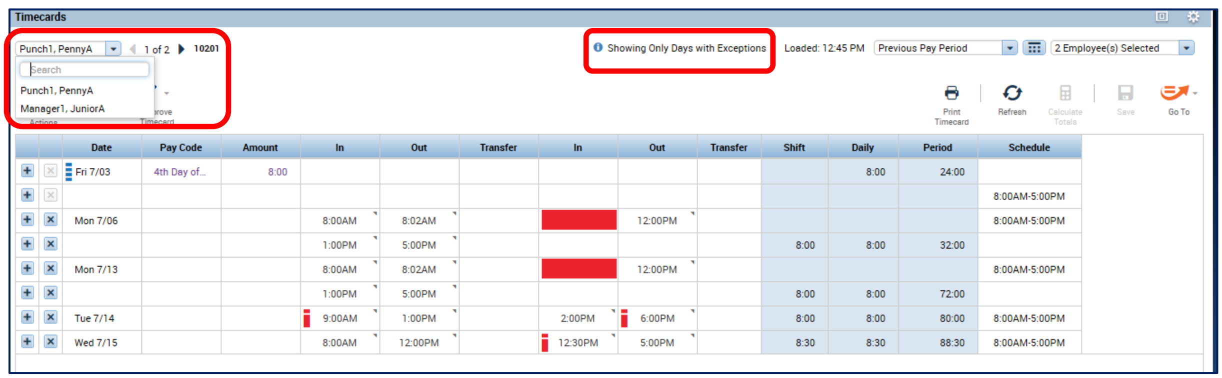
Exception Type	Description
Missed Punch	The employee did not punch in or out either for lunch or at the end of the day. In other words, their punch is missing.
Punch Exceptions	Employee punched in or out early or late, based on their schedule.
Lunch Exceptions	Employee took a long or short lunch break.
Unexcused/Unsched	Unexcused - Employee is scheduled to work but did not punch in at all. Unscheduled - Employee punched in but is not scheduled to work.
Holiday Skipped	Non-exempt employee who did not work the scheduled day before and scheduled day after a holiday.
Total	The sum of the totals in all exception columns. The overall totals are at the bottom of the page.

View Timecards by Exception Type

To access the timecards by exception type, select the employee(s), open the **View Exceptions** icon and select the exception type.

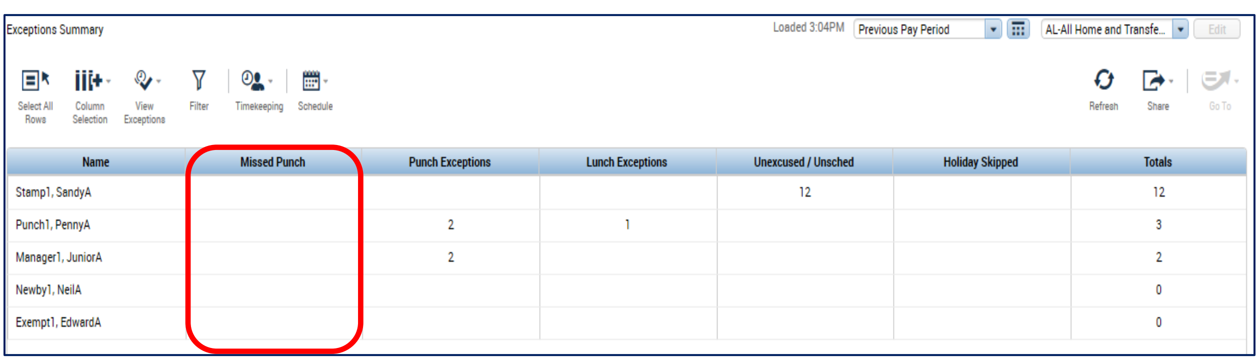


The timecards of those employees with this exception will display. In this example, **Missed Punch** was selected. When the exception applies to more than one employee, the names will display in the drop-down list on the left side of the page. The **Search** field will allow a search for an employee name, or the employee name may be selected from the list. There is also a scroll bar to the right of this field to allow scrolling between employee timecards. There is an indicator for **Showing Only Days with Exceptions** that displays at the top of the page as a reminder.



Edit the timecards as needed, following the same methods as outlined in the previous section. Then **Save** each timecard.

Once the exceptions have been corrected, return to the **Exceptions Summary** page, click the **Refresh** button and the number of exceptions will be updated. In this example, there are no longer any missing punch exceptions.



Scheduling Employees

Introducing Scheduling

Using the application's scheduling capabilities, you may quickly compare the differences between worked and scheduled time and identify additional workload needs. You may also track employees' absences as well as early or late arrivals. To take full advantage of these capabilities, you need to create, review, and maintain accurate schedules for employees in the application.

Schedules are used for two key reasons: to match staffing to workload requirements and to manage time and labor data for individual employees.

When you manage time and labor data for individual employees with schedules, you may:

- Track attendance.
- Track exceptions such as when an employee is early, late, or absent.
- Schedule and view non-worked hours, such as annual leave in advance.
- Pre-populate exempt employee timecards with standard schedule information.

Scheduling process

The scheduling process helps you identify whether your employees' schedules meet the workload requirements. The following illustration shows the five main stages in the scheduling process:

Assess workload

Each division has unique staffing needs, which is driven by its workload requirements for a given period. Often managers assess the amount of work that needs to be performed in their division and then evaluate how to meet those demands with their workforce. You typically know your workload before you work with eSTART scheduling.

Update group assignments

New hires may be assigned to a **schedule group** to provide exception reporting. You may change these initial assignments as your staffing needs change.

Meet workload requirements

After you identify your workload needs for a specific time period, you may assign schedules to employees in your division to meet those needs. Assigning schedules to employees allows you to compare employee work hours to scheduled hours to identify discrepancies and take any necessary action.

Evaluate the schedules

After you finish scheduling your employees for a given period, you need to evaluate the final schedule to ensure that it meets your workload needs for that time period. You may evaluate each employee's total scheduled hours to ensure that the employee meets the requirements. You may also view scheduled hour totals to ensure alignment with your budget and keep overtime to a minimum.

Maintain the schedules

There may be times when you need to change schedules so that the information in eSTART is accurate and your workforce is paid correctly.

Scheduling terms

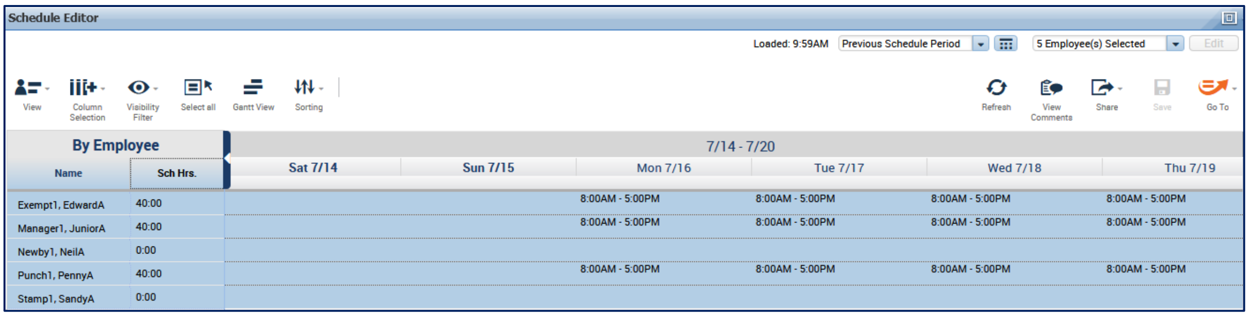
The following table describes key scheduling terms used in eSTART:

Term	Description
Schedule	The plan for worked and non-worked days for an employee in the past, present, and the future.
Schedule Groups	A way to organize employees for easier and quicker scheduling. Usually employees work the same schedule, but you may also group employees to make it easier to select and sort.
Shift	The time an employee is expected to work. A shift contains a start time and an end time.
Totals	Rows that display the sum of the scheduled hours for all employees, as well as the total number of employees scheduled for the selected time period.

Navigating the Schedule Editor

The Schedule Editor allows a manager to schedule employees worked and non-worked hours. Using the Schedule Editor, you may:

- Add, edit, and delete shifts.
- Assign employees to schedule groups.
- Add pay codes for worked or non-worked hours.



Columns	Description
Name	Lists the employee names.
Sch Hrs.	Displays total number of scheduled hours by employee for the selected time period, with lunch deducted, if applicable.
Date cells	For each day in the selected time period, displays shift start and end times. A date cell may also display pay codes to identify scheduled non-worked hours.

NOTE

Pay period selections are not available in the Time Period drop-down from the Schedule Editor. Use the **Range of Dates** selection if a broader time period is needed.

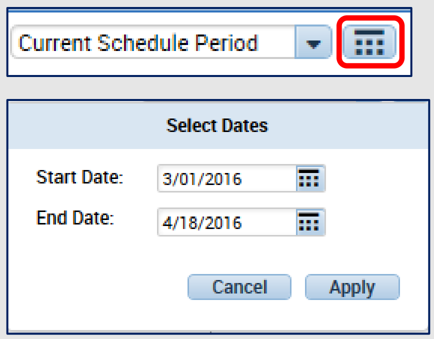
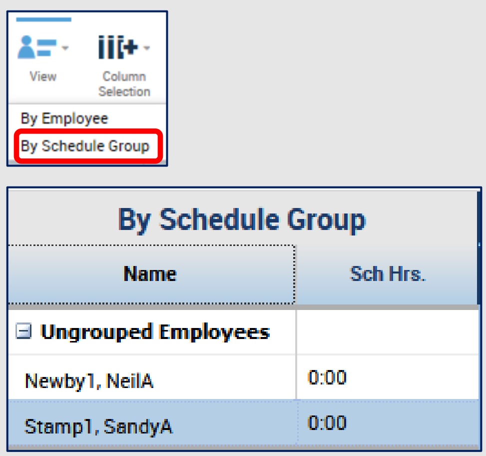
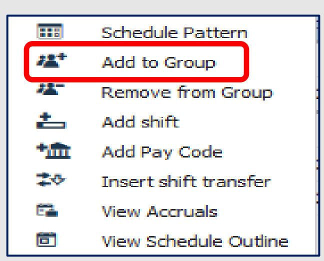
- A **Pay Period** is a time period from **1st – 15th** or **16th-31st**.
- A **Schedule Period** is the FLSA (Fair Labor Standards Act) week. It is a one-week span of time, from Saturday to Friday.

Using Groups to Assign Schedules to Employees

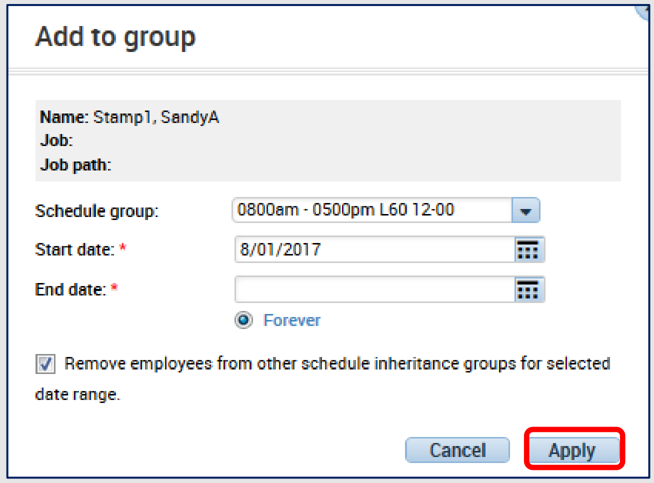
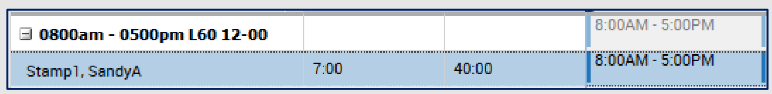
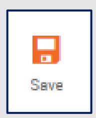
When you assign an employee to a schedule group, you specify how long the employee will belong to the group. If there is no defined end to the group assignment, you may indicate that the employee belongs to the group indefinitely.

Exercise

Sandy Stamp is not currently assigned to a schedule group. She works a schedule of **8:00am - 5:00pm** with a **60-minute lunch**. Therefore, you will assign her to a schedule group effective on previous month with no end date.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select the **Range of Dates** icon. For this exercise, choose the <u>first workday of the previous month</u> as the **Start Date**. The **End Date** will be today's date. Click **Apply.**	
3	Select **View>By Schedule Group**. Then highlight **Sandy Stamp** in the **Ungrouped** section. Right-click on Sandy's name.	
4	The selection window displays. Choose **Add to Group.**	

Steps

5	The window expands to allow the group to be selected. From the **Schedule Group** drop-down list, select the applicable **schedule group**.	
6	The **Start Date** defaults to the start date selected from Time Period**.**	
7	For the assignment to be in effect with no end date, select **Forever**. If the schedule is to be temporary, select the date from the **End Date** calendar.	
8	The check mark for **Remove employees from other schedule inheritance groups for the selected date range** remains selected.	
9	Click **Apply.** Sandy is now assigned to the schedule group.	
10	Click **Save**.	

Tip

You may remove an employee from a Schedule Group by selecting **Remove from Group** from the selection window.

NOTE

If a schedule group is needed, (not available in the list) contact your Agency Administrator to have it added.

Adding or Editing Shifts Using the Shift Editor

When creating and editing more complex schedules, use the **Shift Editor**. It has tools that make it easier for you to create and edit shifts with several segments, shifts with transfers, shifts that cross the day divide, and other complex shifts.

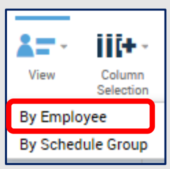
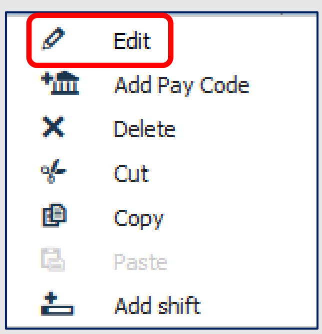
Exercise

On Monday of the next schedule period, you need **Penny Punch** to work the following shift segments:

- Regular shift from 8:00 a.m. to 12:00 p.m.
- Lunch break from 12:00 p.m. to 12:30 p.m.
- Regular shift from 12:30 p.m. to 4:30 p.m.

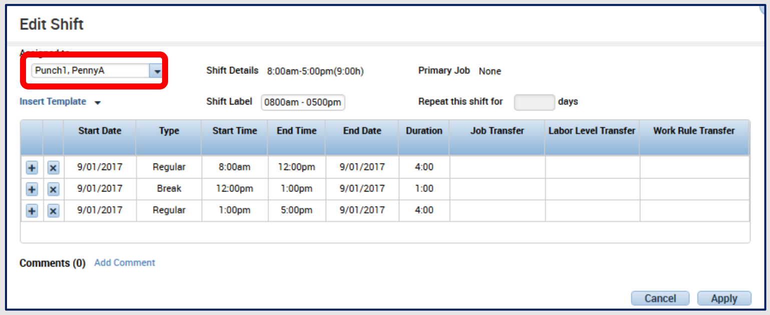
Follow the exercise below to edit Penny's shift.

NOTE: Shift times must always be entered in 15-minute increments.

Steps		
1	From **Schedule Editor**, return to the **By Employee** view by selecting **View>By Employee.**	
2	From the Time Period drop-down list, select **Next Schedule Period**. Select **Penny Punch**.	
3	Right-click the **Monday** cell where the shift is to be edited. The window displays to allow editing.	
4	Select **Edit**.	

Steps

5 The **Edit Shift** window displays.

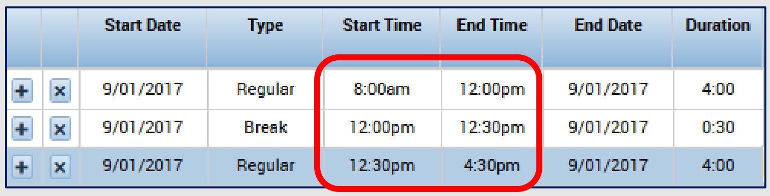


Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
9/01/2017	Regular	8:00am	12:00pm	9/01/2017	4:00			
9/01/2017	Break	12:00pm	1:00pm	9/01/2017	1:00			
9/01/2017	Regular	1:00pm	5:00pm	9/01/2017	4:00			

6 To modify her existing shift to allow 30 minutes for lunch and to leave 30 minutes early, edit the

Break End Time to **1230p**
Regular Start Time to **1230p**
Shift End Time to **430p**

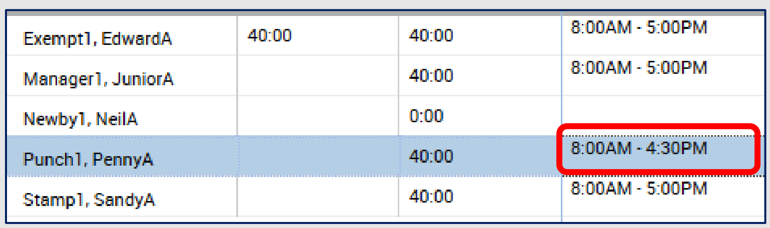
NOTE: Shift times must always be in 15-minute increments.



Start Date	Type	Start Time	End Time	End Date	Duration
9/01/2017	Regular	8:00am	12:00pm	9/01/2017	4:00
9/01/2017	Break	12:00pm	12:30pm	9/01/2017	0:30
9/01/2017	Regular	12:30pm	4:30pm	9/01/2017	4:00

7 Click **Apply.**

Review the schedule and if correct**,** click **Save**.



Exempt1, EdwardA	40:00	40:00	8:00AM - 5:00PM
Manager1, JuniorA		40:00	8:00AM - 5:00PM
Newby1, NeilA		0:00	
Punch1, PennyA		40:00	8:00AM - 4:30PM
Stamp1, SandyA		40:00	8:00AM - 5:00PM

NOTE

Another method for adding the shift is to click in the cell and manually key the shift times, i.e. 8a-5p, 730a-430p.

Also, if a cell does not contain an existing shift, right-click in the empty cell and select **Add Shift** from the menu.

Tip

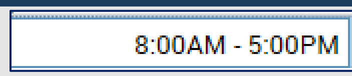
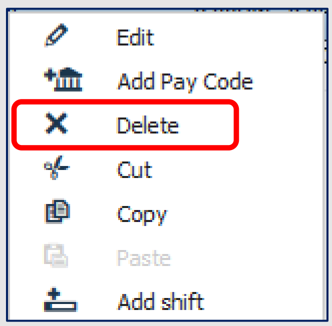
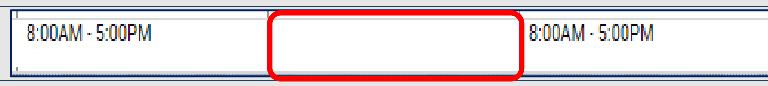
Enter time using a 12-hour format with either **am/pm** or **a/p** abbreviations. For example, you may enter 8:00am to 5:00pm or 8a-5p. You may also copy and paste shifts using **Ctrl-C** and **Ctrl-V**.

Deleting Shifts from Employees’ Schedules

Sometimes an employee is unable to work a scheduled shift. When this happens, you need to delete the shift from the employee’s schedule to prevent the application from flagging the absence as unexcused.

Exercise

Penny Punch, who is currently scheduled to work on Tuesday of the next schedule period, will not be working on Tuesday. Access the **Schedule Editor** and delete her schedule for **Tuesday.** Select **Next Schedule Period.**

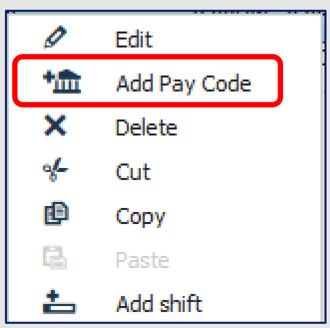
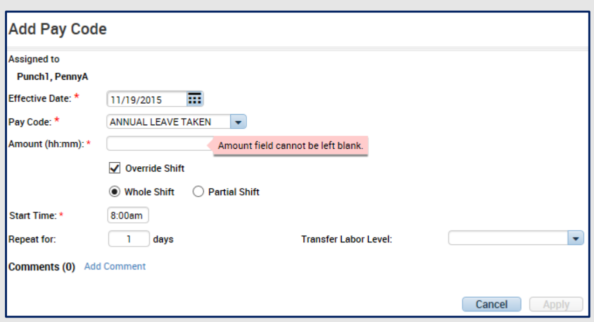
Steps		
1	Select the shift on Tuesday for Penny.	
2	Right-click on the shift and the window will display.	
3	Select **Delete** to remove the shift.	
4	Click **Save**.	

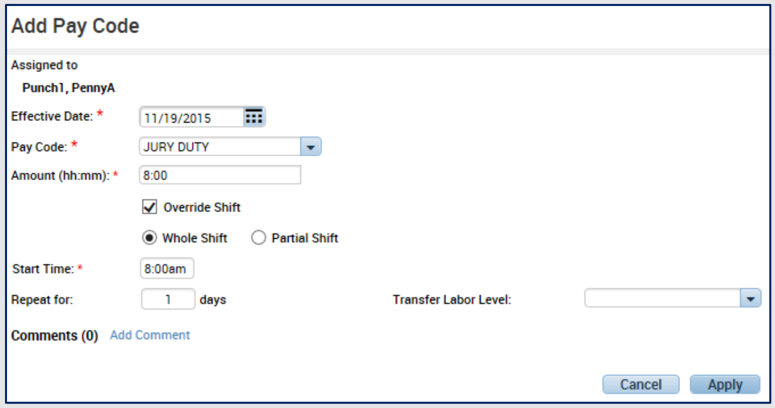
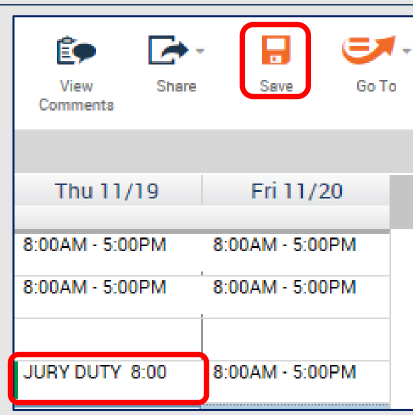
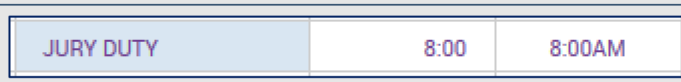
Scheduling Non-Worked Hours

Non-worked hours include time such as sick leave, annual leave, or jury duty. You may schedule your employees' non-worked time when you are made aware of the non-worked time.

Exercise

Penny Punch has been called to serve jury duty on **Thursday** of the **Current Schedule Period**. Because you know about it in advance, you want to schedule the time so that you do not forget.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	From the Time Period drop-down list, select **Current Schedule Period**. From the Show drop-down list, select **All Home and Transferred In**.	
3	Locate **Penny's** row and click the cell in the row where you want to schedule non-worked hours. Then right-click to display the Edit Shift window. Select **Add Pay Code.**	
4	The **Add Pay Code** window displays.	

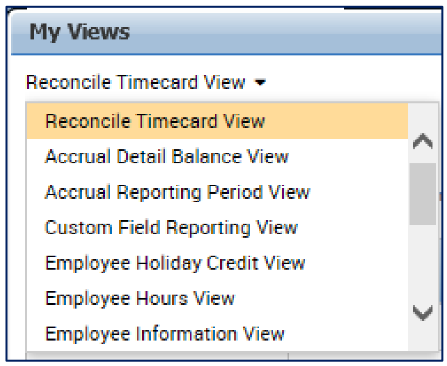
Steps		
5	In the **Effective Date** field, confirm the date selected. (Or, if incorrect, enter the correct date.)	
6	From the **Pay Code** drop-down list, search if needed, then select **Jury Duty.**	
7	In the **Amount** field, enter 8 hours.	
8	The **Override Shift** check box is selected. • To override the employee's entire shift, select **Whole Shift.** • To override part of the employee's scheduled shift, select **Partial Shift**. For this exercise, **Whole Shift** will remain selected.	
9	In the **Start Time** field, the shift start time will automatically default. **NOTE:** For partial shifts, enter the correct start time of the leave. Be sure to enter **am/pm** correctly.	
10	Click **Apply** and then click **Save**.	
11	Highlight Penny Punch and select **Go To>Timecards.** Verify the pay code in Penny's timecard.	

Reviewing Employee Data in eSTART

eSTART pages present customized views of employee information in a summarized, easy-to-read format so that you may quickly analyze and respond to time, labor and scheduling needs.

My Views

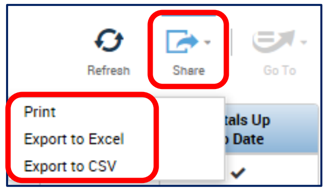
The **My Views** widget is the default widget for the Manager Workspace. **Reconcile Timecard** is the default selection, but there are other widgets available in the drop-down list. Other widgets available from the My Views drop-down are in the table below with a brief description.



View	Description
Reconcile Timecard View	Display exceptions, Holiday skipped, and totals up to date.
Accrual Detail Balance View	Employee leave ending balances for each leave type.
Accrual Reporting Period View	Employee accrual leave balances, pending usages, pending accruals and ending balances, by employee.
Custom Field Reporting View	Includes employee information for pay rules, scheduled group, lunch, employee type, approver, current or arrears.
Employee Holiday Credit View	Holiday Earned and Holiday Taken hours by employee.
Employee Hours View	Employee hours: Regular and Non-Worked, Comp and OT.
Employee Information View	Includes employee information for pay rules, labor account, hire date, employment terms, current or arrears, scheduled group, assigned manager.
Leave Cases View	Includes leave reasons, leave frequency, leave case status, leave category, initial leave request date.
Leave Hours View	Includes total leave hours, leave case status, last date of committed paid and unpaid leave time, leave end date (if one is provided).
On Premises View	Non-exempt employees currently at work.
Pay Period Close View	Final review of your employee time records, displays indicators for employee and manager approvals.
All WTK Exceptions	This widget is used to track exceptions in the system. Reconcile Timecard is the preferred widget for viewing exceptions.
Count All WTK Exceptions	This widget is used to track exceptions in the system by type. Reconcile Timecard is the preferred widget for viewing exceptions.

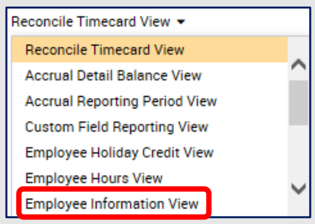
NOTE

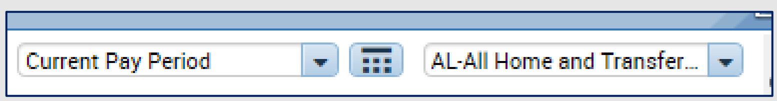
Information from any widget may be printed from the **Share** icon. You may also export the data to an Excel (.xls) or CSV (Comma Separated Value) file to make it available to other applications such as Excel.

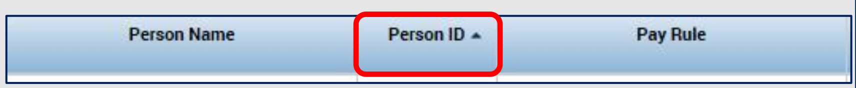


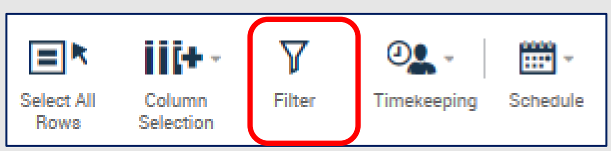
Exercise

You want to look at how your employees are set up in eSTART.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Open the My Views drop-down and choose Employee Information View.</td><td>
</td></tr>
<tr><td>2</td><td>From the Time Period drop-down list, select Current Pay Period.

From the Show drop-down list, select AL-All Home and Transferred-In.</td><td>
</td></tr>
<tr><td>3</td><td>To sort information, click the column header once to sort in descending order and twice for ascending.

The Filter icon may also be used to search specific information. Select the filter a second time to remove the filter.</td><td>

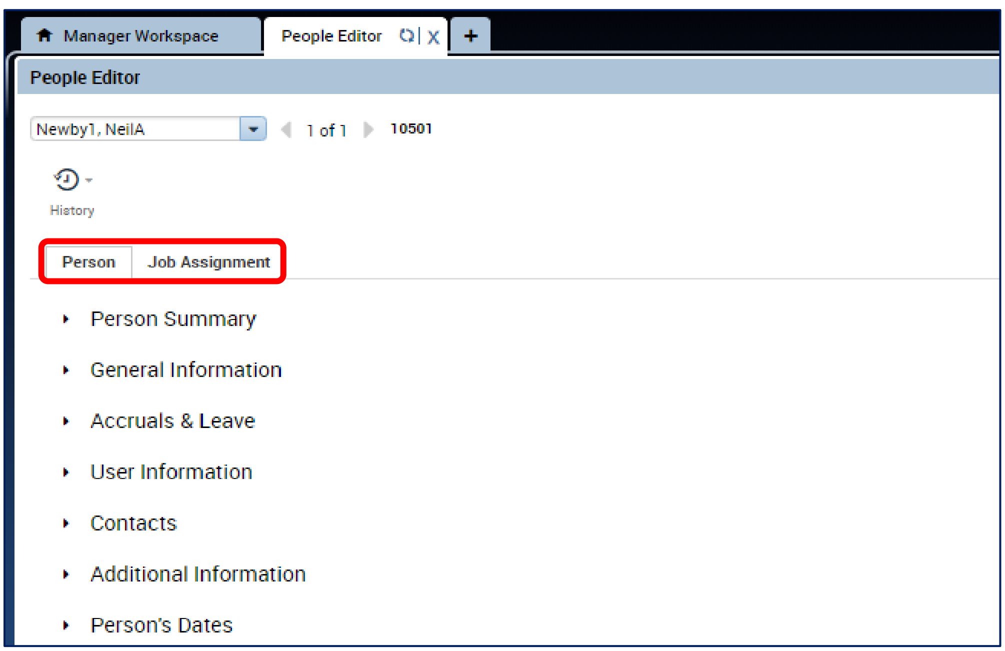

</td></tr>
<tr><td>4</td><td>Review the information from Employee Information View.</td><td>
<table>
<tr><th>Person Name</th><th>Person...</th><th>Pay Rule</th><th>Primary Labor Account Na...</th><th>Hire Date</th><th>Employment Terms</th><th>Current...</th><th>Schedule Group</th><th>Assigned Manager</th></tr>
<tr><td>Exempt1, EdwardA</td><td>10101</td><td>ESMARS-EXEMB-EXEMP-...</td><td>001/0000/100010/10001/...</td><td>1/01/2...</td><td>8 Fixed Holiday - Exempt</td><td>Arrears</td><td>0800am - 0500p...</td><td>Manager1, JohnA</td></tr>
<tr><td>Manager1, JuniorA</td><td>10301</td><td>SMARS COMP 60P</td><td>001/0000/100010/10001/...</td><td>1/01/2...</td><td>8 Fixed Holiday</td><td>Arrears</td><td>0800am - 0500p...</td><td>Manager1, JohnA</td></tr>
<tr><td>Newby1, NeilA</td><td>10501</td><td>Needs Update</td><td>001/0000/-/10001/-/-/-</td><td>1/01/2...</td><td></td><td></td><td></td><td>Manager1, JohnA</td></tr>
<tr><td>Punch1, PennyA</td><td>10201</td><td>SMARS COMP 60P</td><td>001/0000/100010/10001/...</td><td>1/01/2...</td><td>8 Fixed Holiday</td><td>Arrears</td><td>0800am - 0500p...</td><td>Manager1, JohnA</td></tr>
<tr><td>Stamp1, SandyA</td><td>10401</td><td>SMARS COMP 60P</td><td>001/0000/100010/10301/...</td><td>1/01/2...</td><td>8 Fixed Holiday</td><td>Arrears</td><td></td><td>Manager1, Juni...</td></tr>
</table>
NOTE: Neil Newby’s information is incomplete. The Pay Rule column displays “Needs Update” and other information is missing.</td></tr>
</table>

Employee Information View Column Description

Column	Description
Pay Rule	Indicates how an employee earns time (i.e. Exempt vs. Non-Exempt, Overtime\Comp Time, etc.)
Primary Labor Account Name-Full	The Agency/Division/Work Location/Manager ID/Job Classification Code to which the employee is assigned.
Hire Date	The employee's date of hire.
Employment Terms	Indicates if an employee qualifies for Holidays
Current or Arrears	Indicates if an employee is paid current or in arrears
Schedule Group	Indicates the assigned schedule group of an employee
Assigned Manager	The manager to whom the employee is currently assigned

People Editor

To view the employee setup in eSTART, use **Go To>People Editor** or **Related Items>People Editor**. This view provides information on the employee's hire date, user ID, pay rule, etc. View information using the left menu from the **Person** tab or the **Job Assignment** tab. A manager cannot edit any of the information on these pages but may contact the Agency Administrator if changes are needed.



Locating Employees Using Quickfind

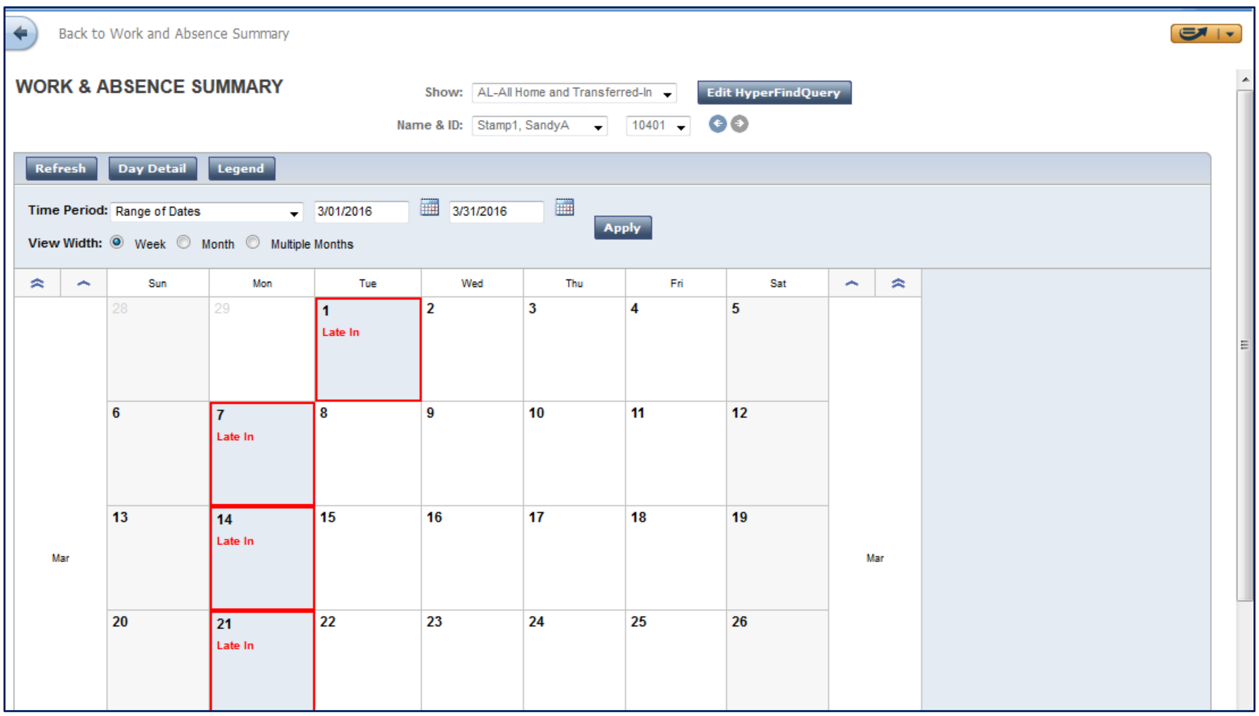
Related Items>Quickfind may also be used to access the employee's timecard. You may use other eSTART customized views to access timecards, but this page is designed to help you locate an employee by the name or ID. If you are unsure of the spelling of an employee's name or know only some of the digits in an employee's ID number, you may include wildcard characters to help you find the employee with only partial information.

Wildcard Character	Description	Example
? _	A question mark or underscore indicates a single character occupies a position in the search string.	**10??** finds all employees whose ID contains 4-digit numbers starting with 10. **Sm_th** finds all employees whose last name starts with "Sm" and ends with "th" and has one letter in the center.
* %	An asterisk character or a percent symbol indicates multiple characters may occupy a position in the search string.	***, s*** finds all employees whose first name begins with the letter S. **%1** finds all employees whose ID number ends with the number 1.

Using the Work & Absence Summary Calendar

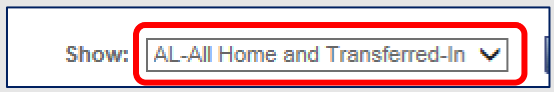
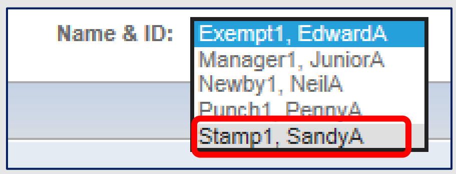
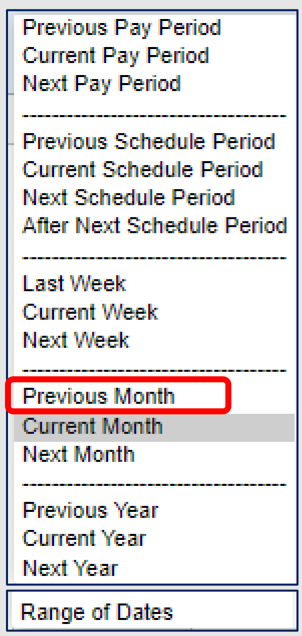
You may use the Work & Absence Summary calendar to identify trends in worked and time off events for employees. The calendar-like display makes it easy for you to see whether an employee has a pattern of taking time off or of arriving late on a specific day of the week. You may see trend information such as the following:

- Number of days the employee has arrived late to work or left early
- Number of days the employee has taken sick or annual leave
- Days the employee has missed punches



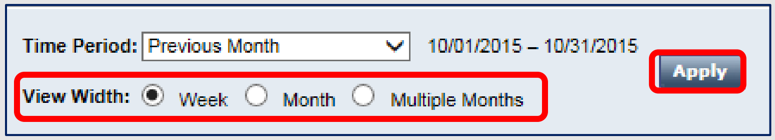
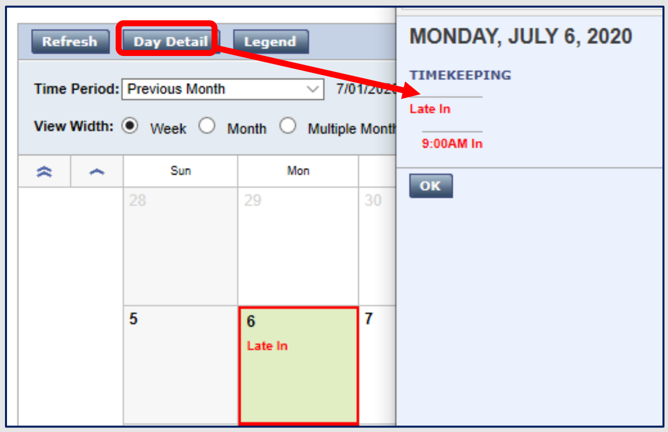
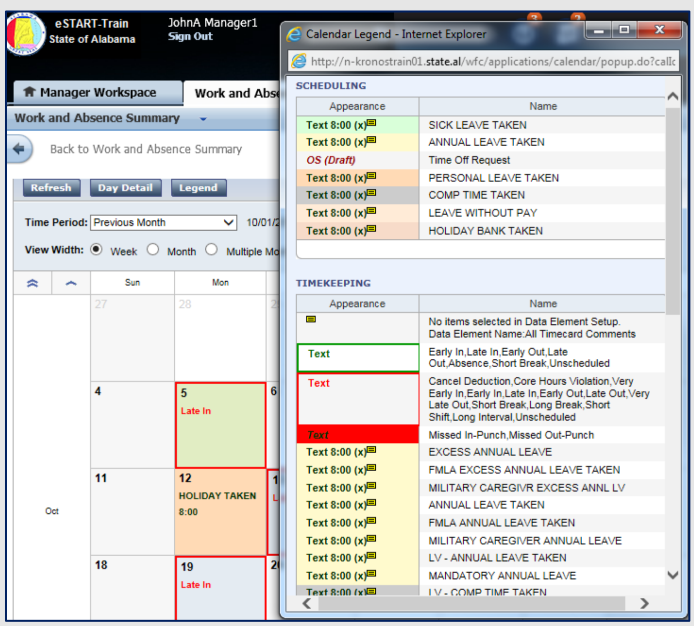
Exercise

You are scheduled to deliver a performance review with **Sandy Stamp** this week. Prior to the meeting, you would like to research her calendar for the year. Access the **Work & Absence Summary** calendar to review **Sandy's** attendance.

Steps		
1	From the **Related Items** pane, select **Work and Absence Summary**.	
2	Select **All Home and Transferred In** from the Show list.	
3	Select **Sandy Stamp** from the **Name & ID** list.	
4	Select the **Previous Month** from the Time Period drop-down list.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>Select the View Width option to review attendance events in a weekly calendar, monthly calendar, or in multiple months.

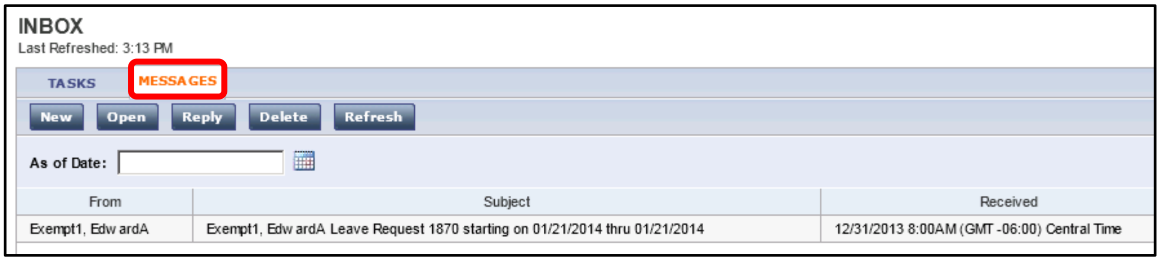
Click Apply.

For example, to see how many attendance events the employee has over a month, select Month and then click Apply.</td><td>
</td></tr>
<tr><td>6</td><td>(Optional) Select one or more days and click Day Detail for more detailed information.</td><td>
</td></tr>
<tr><td>7</td><td>(Optional) To see a legend of all color and visual indicator meanings, click the Legend button.</td><td>
</td></tr>
</table>

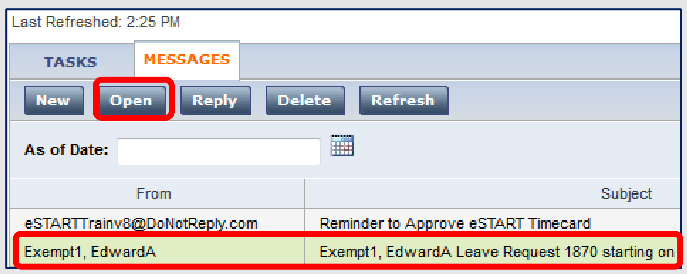
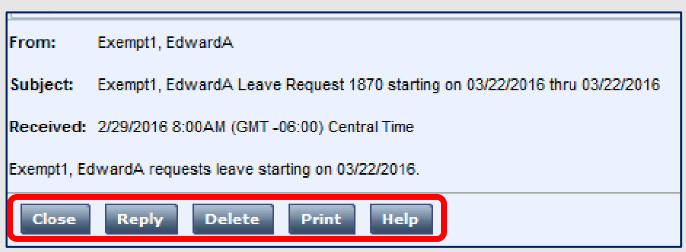
Reviewing Time and Attendance Data

Using the Inbox to View/Send Messages

My Inbox allows you to manage tasks and email messages sent via eSTART. In particular, the Messages tab allows you to create, read, reply to, and delete messages using eSTART's internal messaging system. Employee requests for leave are one example of a typical message managers will receive.



Exercise

Steps		
1	From the **Related Items** pane, select **My Inbox**.	
2	From the **Messages** tab, select the message you want to review and click **Open**. **NOTE:** You may also double click to open a message.	
3	What do you want to do? • Click **Close** to close the message. • Click **Reply** to compose a message. • Click **Delete** to remove the message from the Inbox. • Click **Print** to send the message to a printer. • Click **Help** to access online help for this feature.	
4	Close the **Message** window. Then close the **Inbox** tab.	

NOTE: Users who have an Agency email account will also receive these messages in their mailboxes.

Generating Reports

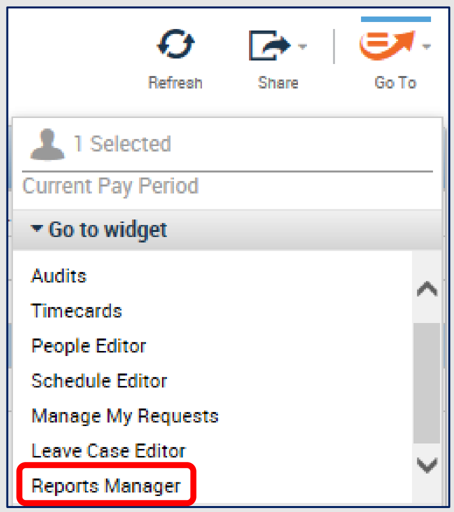
You may generate reports on a daily, weekly or pay period basis, or any time you need information to accomplish your business tasks.

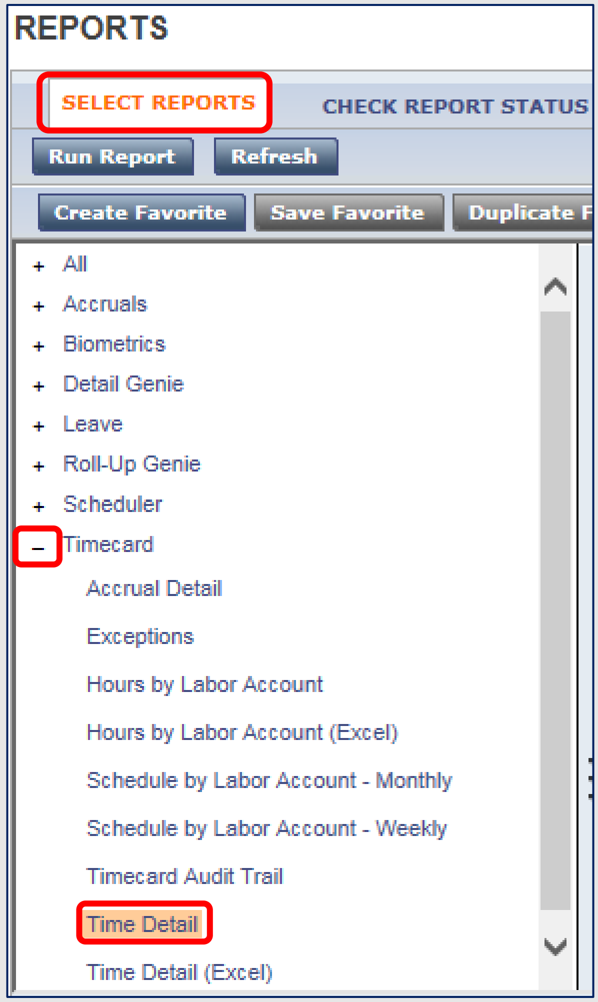
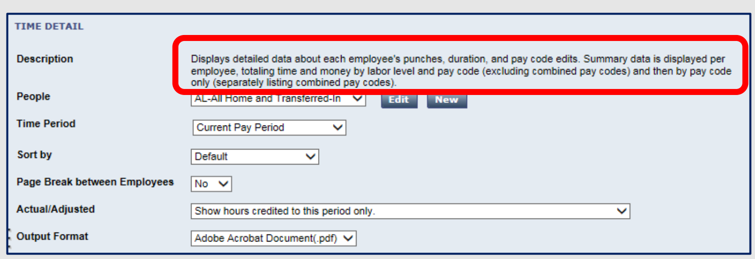
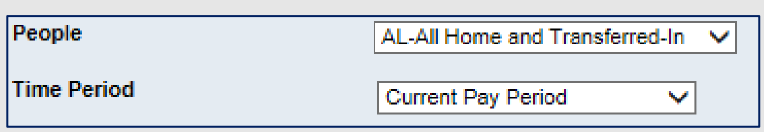
Exercise

For auditing and validation purposes, you want to review all your employees' timecard hours and totals for the pay period in a report format. Select the **Time Detail** report to review this information.

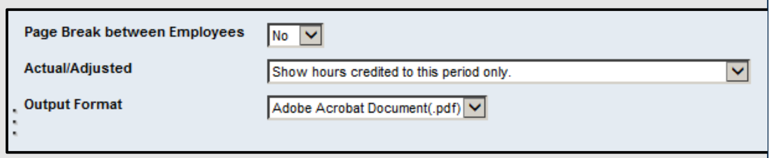
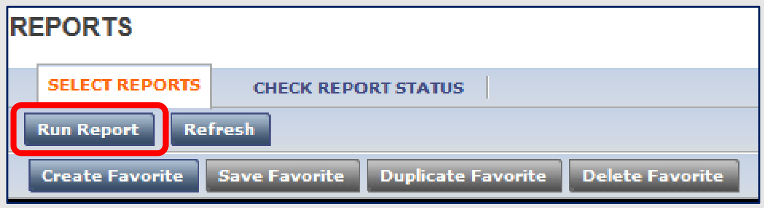
<table>
<tr><th colspan="3">Steps</th></tr>
<tr>
<td>1</td>
<td>From the Related Items pane, select Reports Manager.

NOTE: You may also run a report for a specific set of employees by selecting the employees in a customized view and choosing Go To>Reports Manager.</td>
<td>


</td>
</tr>
</table>

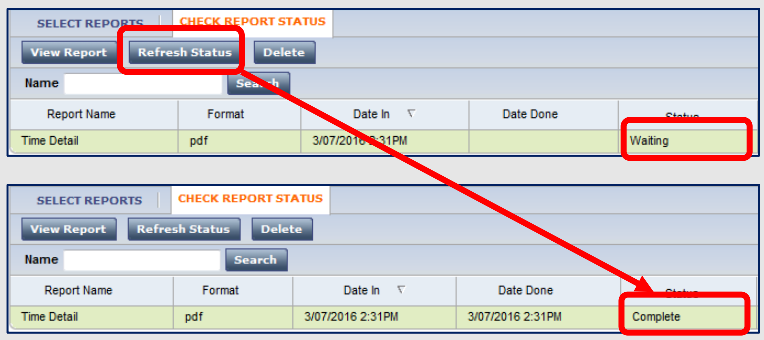
Steps		
2	From the **Select Reports** tab, click the plus **(+)** to the left of the **Timecard** category to display its contents.	
3	Click the **Time Detail** report. **NOTE:** A description of the report displays on the right pane. Also, reports that have (Excel) at the end of their names are available in **Microsoft Excel Document (.xls)** format. All other reports are available in **Adobe Acrobat Document (.pdf)** format.	
4	Select **AL-All Home and Transferred-In** from the **People** drop-down list.	
5	Select **Current Pay Period** from the Time Period drop-down list.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>6</td><td>Select one or more available options to identify the report information you need.

NOTE: Options may vary by report.</td><td>
</td></tr>
<tr><td>7</td><td>This report is only available in Adobe format, so the Output Format field cannot be changed.</td><td></td></tr>
<tr><td>8</td><td>To generate a report, click Run Report.</td><td>
</td></tr>
<tr><td>9</td><td>After selecting Run Report, the Check Run Status tab displays.

The Status column displays Waiting.

Click Refresh Status.

The Status column displays Complete once the application has finished the report.</td><td>
</td></tr>
<tr><td>10</td><td>Once Status is Complete, click on the report name to select it and either:
Click the View Report button to use menu options.
Or double-click the report name to view.</td><td>
</td></tr>
<tr><td>11</td><td>(Optional) To print the report to a local printer, select the Print button. The report may also be saved.</td><td></td></tr>
</table>

Here is an example of a **Time Detail** report.

Time Detail

Time Period:	Previous Pay Period	Data Up to Date:	9/7/2017 10:59:21 AM
Query:	AL-All Home and Transferred-In	Executed on:	9/07/2017 10:59AM GMT-05:00
Actual/Adjusted:	Show hours worked in this period only.	Printed for:	JohnA.Manager1
		Insert Page Break After Each Employee:	No

Employee: Exempt1, EdwardA **ID:** 10101 **Time Zone:** Central
Status: Active **Status Date:** 1/1/2013 **Pay Rule:** ESMARS-EXEMB-EXEMP-UNCLA 60A
Primary Account 001/0000/100010/10001/10518/-/- **Start** 4/16/2015 **End** Forever

Date/Time *Xfr/Move: Account*	Apply To	In Punch *Comment*	In Exc	Out Punch *Xfr: Work Rule*	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
8/16/2017		8:00:00 AM		5:00:00 PM						8:00	8:00
8/17/2017		8:00:00 AM		5:00:00 PM						8:00	16:00
8/18/2017		8:00:00 AM		5:00:00 PM						8:00	24:00
8/21/2017		8:00:00 AM		5:00:00 PM						8:00	32:00
8/22/2017		8:00:00 AM		5:00:00 PM						8:00	40:00
8/23/2017		8:00:00 AM		5:00:00 PM						8:00	48:00
8/24/2017		8:00:00 AM		5:00:00 PM						8:00	56:00
8/25/2017		8:00:00 AM		5:00:00 PM						8:00	64:00
8/28/2017		8:00:00 AM		5:00:00 PM						8:00	72:00
8/29/2017		8:00:00 AM		5:00:00 PM						8:00	80:00
8/30/2017		8:00:00 AM		5:00:00 PM						8:00	88:00
8/31/2017		8:00:00 AM		5:00:00 PM						8:00	96:00

Labor Account Summary	Pay Code	Hours	Money	Days
001/0000/100010/10001/10518/-/-				
	REGULAR	96:00		

Pay Code Summary	Pay Code	Hours	Money	Days
	REGULAR	96:00		
Totals:		96:00	$0.00	0.00

Employee: Manager1, JuniorA **ID:** 10301 **Time Zone:** Central
Status: Active **Status Date:** 1/1/2013 **Pay Rule:** SMARS COMP 60P
Primary Account 001/0000/100010/10001/10586/-/- **Start** 4/16/2015 **End** Forever

Date/Time *Xfr/Move: Account*	Apply To	In Punch *Comment*	In Exc	Out Punch *Xfr: Work Rule*	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
8/16/2017		7:00:00 AM		11:00:00 AM						4:00	4:00
			EV								
8/16/2017		12:00:00 PM		4:00:00 PM						4:00	8:00
					EV						
8/17/2017		8:00:00 AM		12:00:00 PM						4:00	12:00
8/17/2017		1:00:00 PM								0:00	12:00

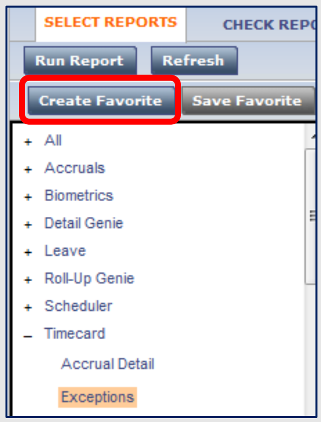
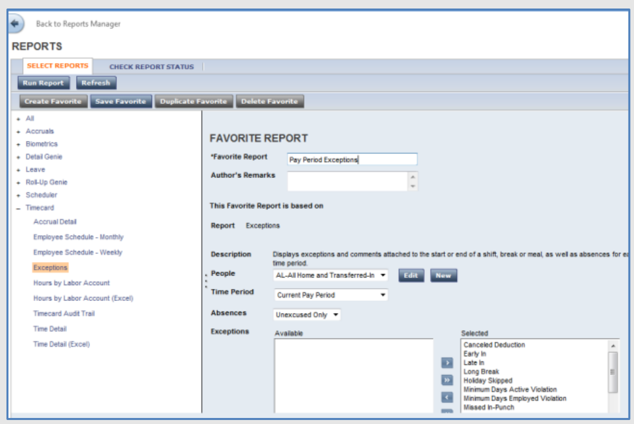
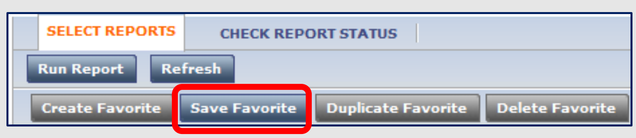
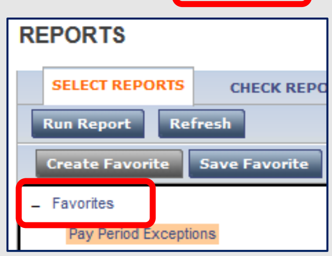
Page 1

Setting Up Report Favorites

If you run the same report with the same options regularly, you may save the report as a favorite. You may run the report as needed without having to reset your options. Favorites display as a new category at the top of the list.

Exercise

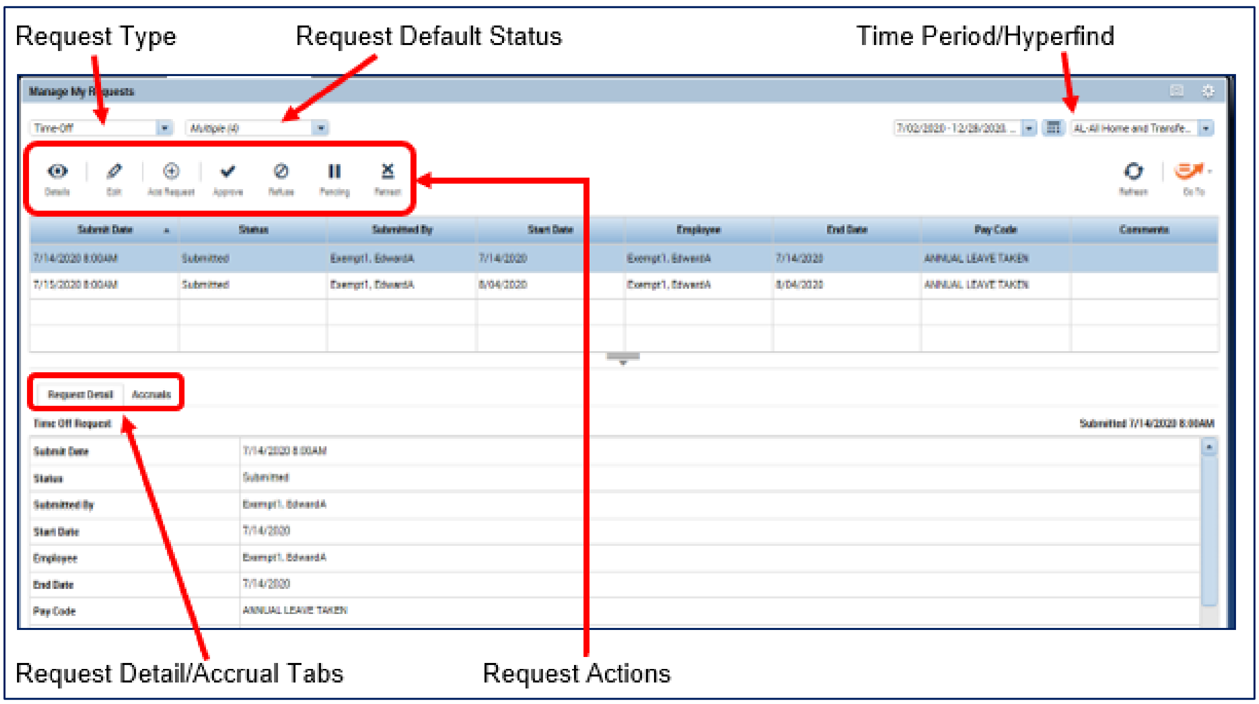
Since you use a modified version of the Exceptions report often, you would like to retain the criteria for regular use. You decide to save this report as a favorite.

Steps		
1	Select the **Exceptions** report.	
2	Click **Create Favorite**.	
3	In the **Favorite Report** field, name the report **Pay Period Exceptions**.	
4	In the **Author's Remarks** field, enter descriptive data (optional).	
5	Select the options that you would like to see in the report. All options are in the **Selected** window. If only certain options are needed, move **All** selections to the **Available** window, then select the options that are desired. Hold down the **CTRL** key for each selection. Use the left and right arrows to move the selections to the **Selected** pane. **NOTE:** Options may vary by report.	
6	Click **Save Favorite**.	
7	Confirm that the report is displayed in the **Favorites** category.	

Working with Time Off Requests

Using the Manage My Requests Widget

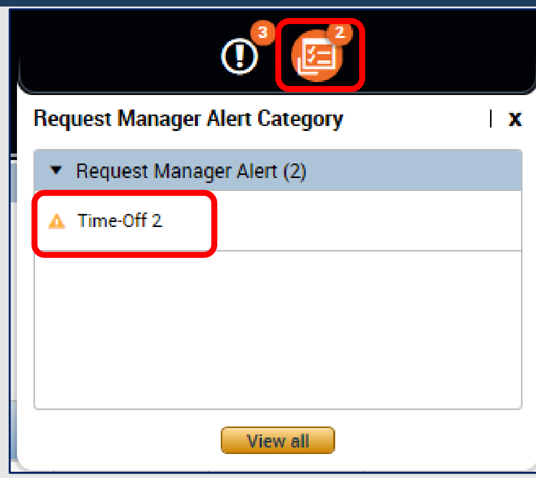
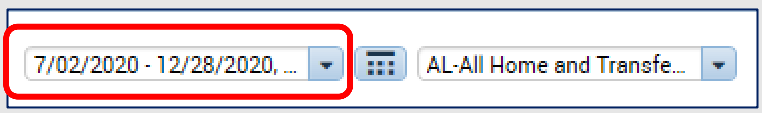
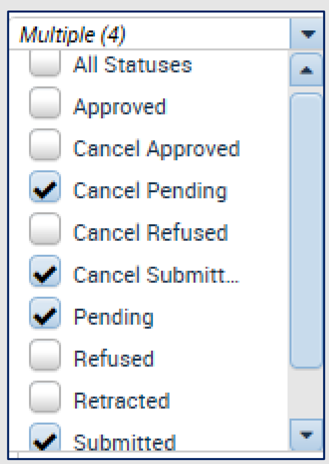
The **Manage My Requests** widget summarizes all requests in one window and provides all supporting information needed to process requests. Requests may come from employees or other managers, such as, manager delegation requests. In the **Manage My Requests** widget, managers may process requests one at a time or simultaneously process multiple requests of the same type. Managers may also filter the list of requests displayed in the widget and sort the list by column.



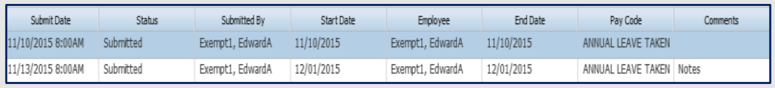
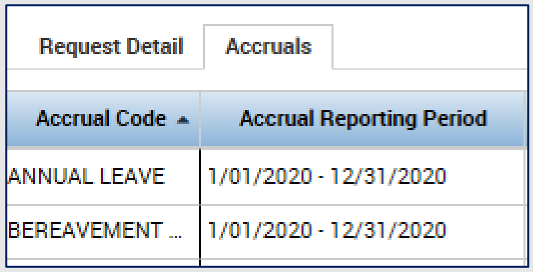
Component	Description
Request Type	This field enables managers to filter the requests that are listed based on the request type.
Request Default Status	This field defaults to the most common request statuses but allows managers to filter the requests to view other statuses.
Request Detail/Accrual Tabs	These tabs display different information relevant to the selected request.
Request Actions	These buttons enable managers to perform actions related to processing employee requests.
Time Period/Hyperfind	The Time Period drop-down allows you to select the timeframe for which you want to view schedules and timecard data. There is also a **Range of Dates** icon to set your own time frame as well as a Hyperfind drop-down for selecting the group of employees to view.

Exercise

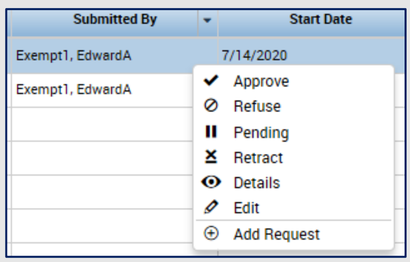
Edward Exempt has submitted two time-off requests. You want to review and approve each of his requests.

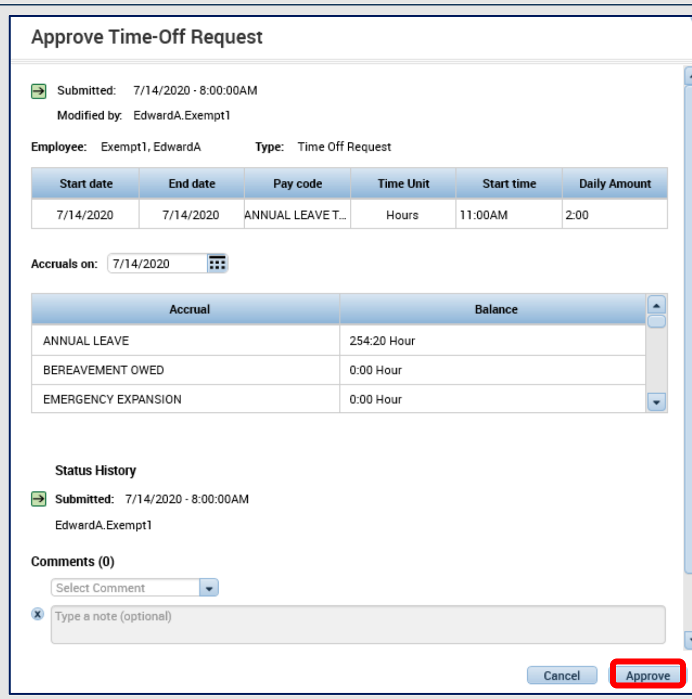
Steps		
1	To access the **Manage My Requests** widget, click on the **Request Manager Alert** icon (on the right) and choose **Time Off.**	
2	Leave the default values or select new values in the Time Period and Show fields.	
3	Confirm the default values or select new values in the Request type and Request status fields. **NOTE**: The **Request Status** button lets you limit which statuses display. For example, you may only want to view Submitted requests. For this exercise, leave defaults.	

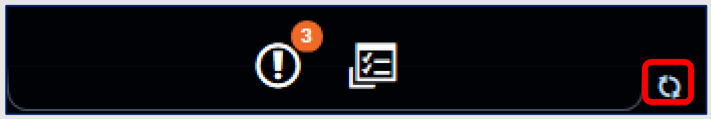
Steps

<table>
<tr><td>4</td><td>Edward has two requests. The first one in the list is pre-selected.</td><td>
</td></tr>
<tr><td>5</td><td>To view the detail on the selected request, select the Request Detail tab or the Details icon at the top of the page.</td><td rowspan="2">
</td></tr>
<tr><td>6</td><td>To view Edward's accrual balances, select the Accruals tab.</td></tr>
<tr><td>7</td><td>To approve, refuse, or perform another action on the selected request(s), click the applicable button.
For this exercise, select Approve.

Another method it to right-click on the request and choose the action from a pop-up menu. This can be used to apply the same action to multiple requests, if desired.</td><td>


</td></tr>
<tr><td>8</td><td>From the Approve Time Off Request page, verify the information and, if applicable, select a comment from the Comments drop-down list and/or enter text in the Notes field.

Also, verify requests for Hours were submitted in <u>15-minute increments</u> and that the start time is also in <u>15-minute increments</u>.</td><td rowspan="2">
</td></tr>
<tr><td>9</td><td>Click the Approve button.</td></tr>
</table>

Steps		
10	Select the remaining Time Off request. Click the **Approve** button.	
11	The **Approve Time Off Request** page displays for this request. Click **Approve.**	
12	Click **Refresh** to update the Alert icon.	
13	Close the widget.	

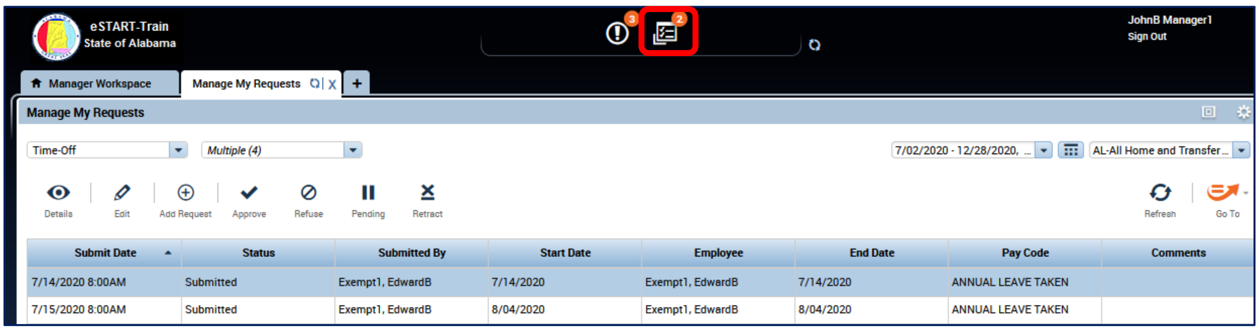
Finalizing Timecards

Reviewing Time Data at the End of the Pay Period

Preparing to approve the timecards is extremely important to ensure that your employees' time and leave events are accurate. Several tools are available in eSTART to aid in this process.

Manage My Requests

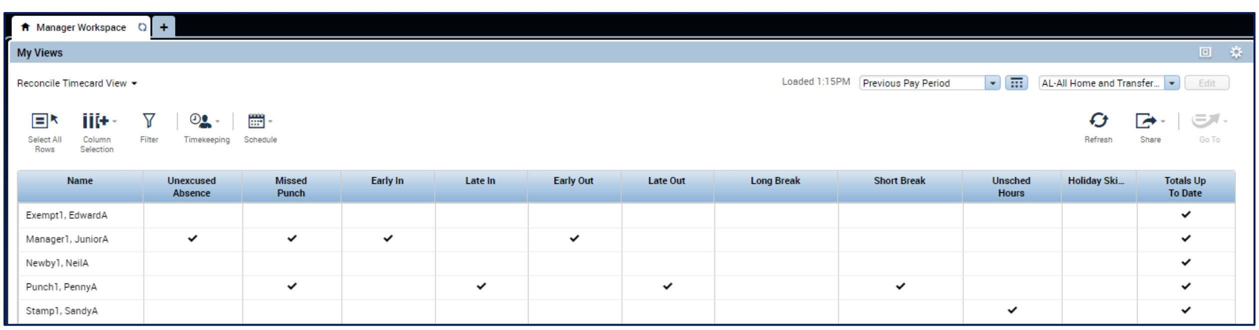
1. Access the **Manage My Requests** widget to ensure that all time off requests have been appropriately acted upon. This widget is accessed from the **Request Manager Alert** icon or from **Related Items>Manage My Requests**. Any requests in Submitted, Pending, Cancel Submitted or Cancel Pending status must be addressed.



NOTE: If unapproved time off requests are present, the manager will receive a notification the second day after the end of the pay period. On the third day, if unapproved time off requests are still present, the administrators and timekeepers receive the notification.

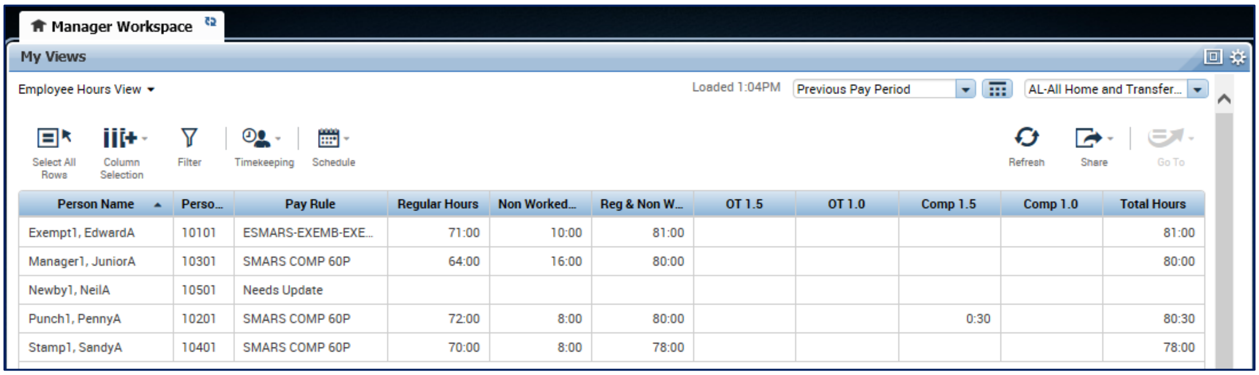
Reconcile Timecard

2. As you have already seen, the **Reconcile Timecard** widget helps you to identify timecard discrepancies at the end of a pay period so that you may perform final edits. You must correct all exceptions before time data is signed off by Administrators. Otherwise, employees may not get paid correctly for that pay period. This view is accessed from the **Manager Workspace.**



Employee Hours View

3. The next step is to ensure the timecards contain the correct number of hours for the pay period. Select **My Views>Employee Hours View** in the **Previous Pay Period**. This provides a view of employee regular hours, non-worked hours, total hours, overtime and comp hours. Review the information on this page for any possible issues with employee time and correct any missing or incorrect time as needed.



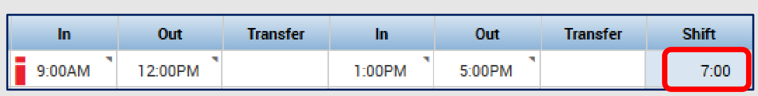
Person Name	Perso...	Pay Rule	Regular Hours	Non Worked...	Reg & Non W...	OT 1.5	OT 1.0	Comp 1.5	Comp 1.0	Total Hours
Exempt1, EdwardA	10101	ESMARS-EXEMB-EXE...	71:00	10:00	81:00					81:00
Manager1, JuniorA	10301	SMARS COMP 60P	64:00	16:00	80:00					80:00
Newby1, NeilA	10501	Needs Update								
Punch1, PennyA	10201	SMARS COMP 60P	72:00	8:00	80:00			0:30		80:30
Stamp1, SandyA	10401	SMARS COMP 60P	70:00	8:00	78:00					78:00

Note that the total hours for Sandy Stamp are fewer than the required hours for the pay period and Edward Exempt's total hours are greater. Complete the exercise to research and correct these issues.

Exempt employees are assigned to an Auto-PFS schedule, so their lunch time is automatically deducted. When a time off request with a midday or partial day time frame is approved, the system determines whether the employee's remaining shift contains at least 4:01 consecutive hours, either in the morning or afternoon portion of the schedule. If the employee's remaining shift does not contain at least 4:01 consecutive hours, the lunch will not be auto-deducted which may require manual edits by the manager. Such is the case with Edward Exempt.

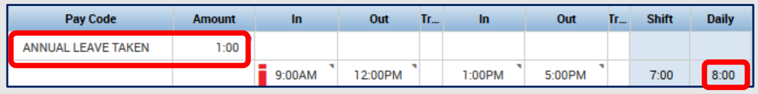
Exercise

The total hours of Sandy Stamp and Edward Exempt are not correct.

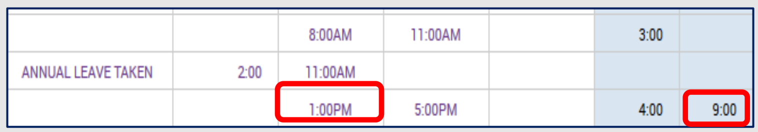
Steps		
1	Select **Sandy Stamp** and **Edward Exempt** in the list and select **Go To>Timecards**.	
2	Sandy Stamp's timecard contains "late in" exceptions and does not have the correct total hours for the pay period. Add one hour of Annual Leave to Sandy's timecard for each day that she was late.	 In | Out | Transfer | In | Out | Transfer | Shift 9:00AM | 12:00PM | | 1:00PM | 5:00PM | | 7:00

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>3</td><td>

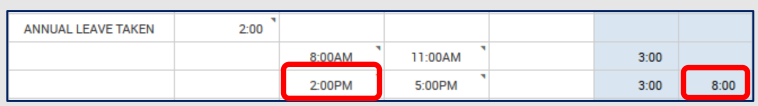
- Select the **Insert Row** button for each of the dates.
- Select **Annual Leave Taken** from the Pay Code drop-down.
- Key **1** in the **Amount** column for each date.
- Select **Calculate Totals** to confirm that Sandy's time is now correct.
- **Save** the timecard.

</td><td>


</td></tr>
<tr><td>4</td><td>Scroll to Edward Exempt's timecard.</td><td></td></tr>
<tr><td>5</td><td>The timecard page displays. Note that one of the dates in Edward's timecard shows 9 total hours instead of 8. This is due to a midday partial time off request.

The lunch time was not auto deducted since neither the morning nor afternoon shift was at least 4:01 hours.</td><td>


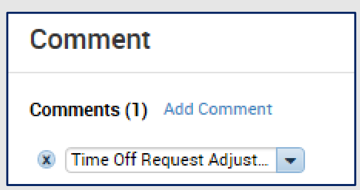
</td></tr>
<tr><td>6</td><td>Change the **1pm** time in the timecard to **2pm**.

NOTE: This correction may also be made to the schedule via the Schedule Editor.</td><td>


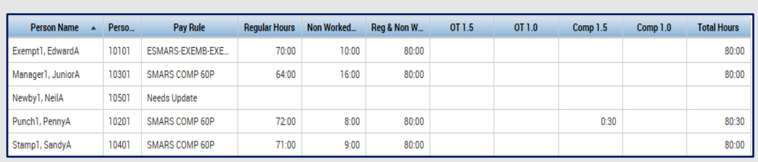
</td></tr>
<tr><td>7</td><td>Select **Calculate Totals** to verify the hours are now correct.</td><td></td></tr>
<tr><td>8</td><td>

Right-click on the punch, select **Add Comments** and choose **Time Off Request Adjustment.**

- Click **OK.**
- **Save** the change.

</td><td>


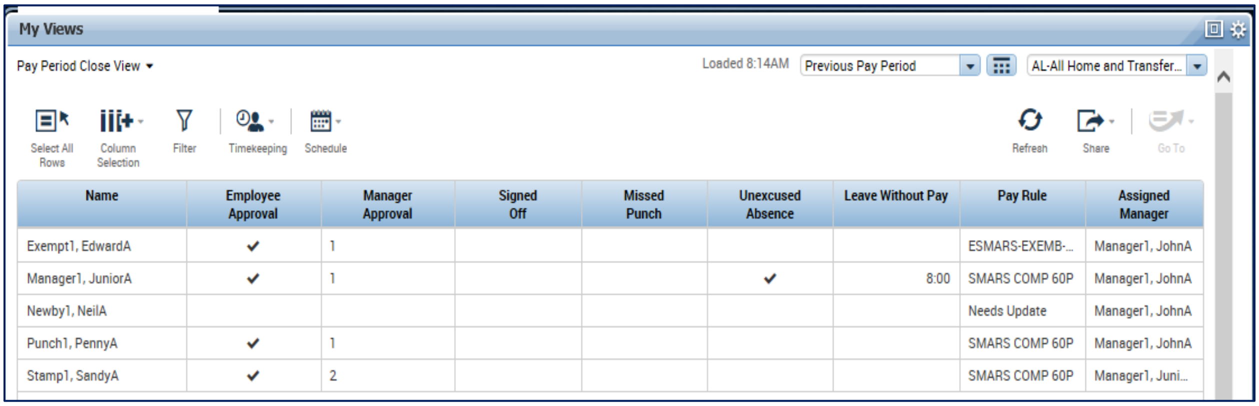
</td></tr>
<tr><td>9</td><td>Close the **Timecards** tab.

Click the **Refresh** button to update the **Employee Hours View** page. Verify that total hours are now correct.</td><td>

<table>
<tr><th>Person Name</th><th>Perso...</th><th>Pay Rule</th><th>Regular Hours</th><th>Non Worked...</th><th>Reg & Non W...</th><th>OT 1.5</th><th>OT 1.0</th><th>Comp 1.5</th><th>Comp 1.0</th><th>Total Hours</th></tr>
<tr><td>Exempt1, EdwardA</td><td>10101</td><td>ESMARS-EXEMB-EXE...</td><td>70:00</td><td>10:00</td><td>80:00</td><td></td><td></td><td></td><td></td><td>80:00</td></tr>
<tr><td>Manager1, JuniorA</td><td>10301</td><td>SMARS COMP 60P</td><td>64:00</td><td>16:00</td><td>80:00</td><td></td><td></td><td></td><td></td><td>80:00</td></tr>
<tr><td>Newby1, NeilA</td><td>10501</td><td>Needs Update</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyA</td><td>10201</td><td>SMARS COMP 60P</td><td>72:00</td><td>8:00</td><td>80:00</td><td></td><td></td><td>0:30</td><td></td><td>80:30</td></tr>
<tr><td>Stamp1, SandyA</td><td>10401</td><td>SMARS COMP 60P</td><td>71:00</td><td>9:00</td><td>80:00</td><td></td><td></td><td></td><td></td><td>80:00</td></tr>
</table>
</td></tr>
</table>

Exempt Employee Schedule Types	Auto PFS Rules for Lunch Deduction
8-hour Employee	The lunch will be deducted when the shift length is 4:01 hours.
9-hour Employee	The lunch will be deducted when the shift length is 4:31 hours.
10-hour Employee	The lunch will be deducted when the shift length is 5:01 hours.

Pay Period Close View

4. The **Pay Period Close** widget is also useful for making a final review of your employee time records and displays indicators for employee and manager approvals. You may access employee timecards from either widget to make final corrections and approve employee timecards. This view is accessed from **My Views>Pay Period Close View.**



Name	Employee Approval	Manager Approval	Signed Off	Missed Punch	Unexcused Absence	Leave Without Pay	Pay Rule	Assigned Manager
Exempt1, EdwardA	✔	1					ESMARS-EXEMB-...	Manager1, JohnA
Manager1, JuniorA	✔	1			✔	8:00	SMARS COMP 60P	Manager1, JohnA
Newby1, NeilA							Needs Update	Manager1, JohnA
Punch1, PennyA	✔	1					SMARS COMP 60P	Manager1, JohnA
Stamp1, SandyA	✔	2					SMARS COMP 60P	Manager1, Juni...

NOTE
A reminder to approve timecards will be sent to all employees' inbox the day after the end of the pay period. Users who have an Agency email account will also receive these messages in their mailboxes.

Approving Timecards

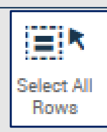
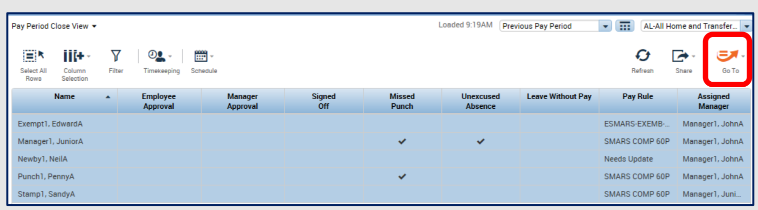
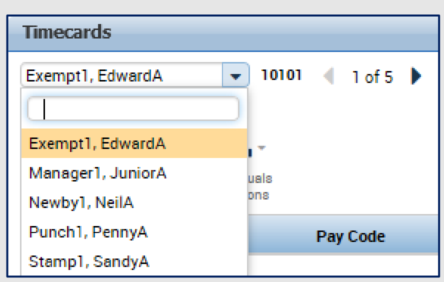
After you finish editing your employees' timecards, you need to approve them to indicate to Payroll that they are ready for processing.

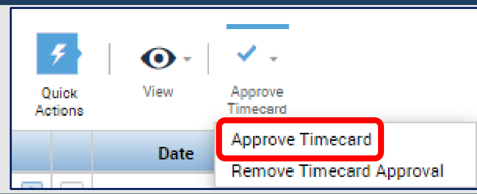
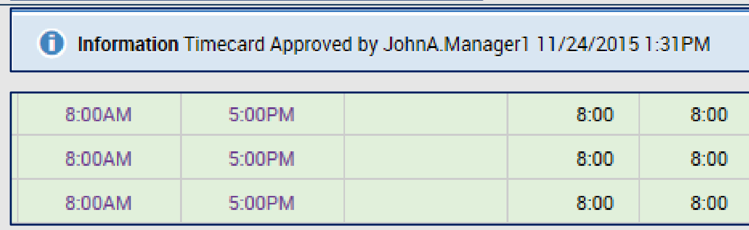
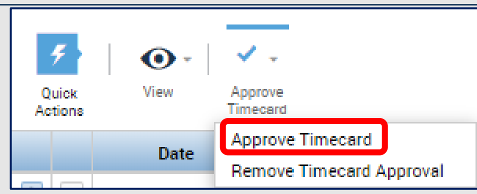
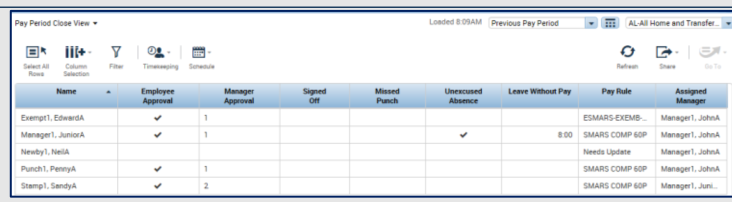
NOTE: All manager approvals must be removed before edits can be made to the timecard.

Exercise

You have reviewed and performed all necessary edits to your employees' timecards. You now approve the timecards for the previous pay period on each timecard.

NOTE: As a rule, your non-exempt and hourly employees should have approved their own timecards before you approve them. The timecard will display with a light tan color if the employee has approved it. For purposes of this exercise, employee approval has not been completed.

Steps		
1	**Pay Period Close** should still be open from the previous exercise. **NOTE:** You may also use **Reconcile Timecard** for selecting your employees.	
2	From the Time Period drop-down list, select **Previous Pay Period**. From the Show drop-down list, select **Al-All Home and Transferred-In**.	
3	Choose **Select all Rows** to select the employees in the list. Then select **Go To>Timecards**.	 
4	The timecard of the first person in the list displays, but all are in the **Name** drop-down. There are also a scroll buttons to the right that may be used to move between the employees' timecards.	

Steps		
5	On the first employee, select **Approve Timecard>Approve Timecard**.	
6	A temporary verification message will display at the top of the timecard after approval and the color of the timecard will change to light green. **NOTE:** See table below for timecard color indicators.	
7	Scroll to the next employee in the list and choose **Approve Timecard>Approve Timecard**. **NOTE:** Any remaining exceptions on the timecard must be addressed before approving.	
8	Continue scrolling through each timecard and approving each one.	
9	Close the **Timecards** tab.	
10	Refresh the **Pay Period Close View** page. The number "1" should display in the **Manager Approval** column for all employees whose timecards were approved.	

Approval Type	Visual Indicator
Employee approval	When a timecard is approved by an employee, the cells in the timecard turn **light tan or orange**.
Manager approval	When a timecard is approved by a manager, the cells in the timecard turn **light yellow**.
Employee and Manager approval	When a timecard is approved by both an employee and a manager, the cells in the timecard turn **light green**.
Agency Administrator Sign off	When a timecard is signed off, the cells in the timecard turn **light gray**.

Best Business Practice

Each non-exempt or hourly employee must approve his or her timecard. This helps to ensure its accuracy before manager approval is applied.

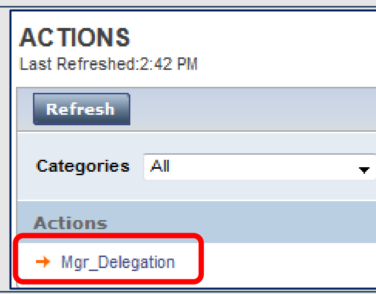
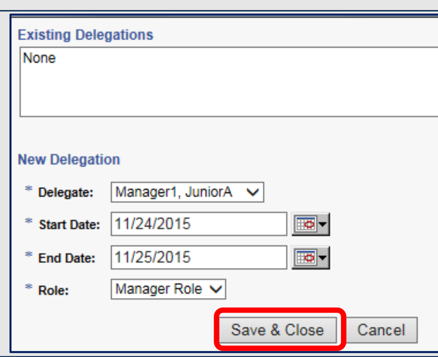
Performing Additional Manager Tasks

Requesting Backup Coverage

You may temporarily delegate your manager tasks in eSTART to another manager. The other manager may perform your tasks using their own user names and passwords. For example, they may modify schedule shifts for absent employees, or review, edit and approve timecards. This allows the business process to keep moving even when you are not there. All edits they perform are recorded and assigned to their names for audit purposes.

Exercise

You are out of the office for two days. You send a delegation request to **Junior Manager** so that you may temporarily assign your timekeeping tasks to him. This will ensure that your employees' timecards are processed for payroll on a timely basis.

Steps		
1	From the **Related Items** pane, select **Temporary Delegation**.	
2	From the list of actions, select **Mgr_Delegation**.	
3	The **Create Delegation** window opens. **NOTE:** If another delegation assignment exists, click **Create New Delegation**.	
4	From the **Delegate** drop-down list, select **Junior Manager**. Select **today's date** from the **Start Date** field and **tomorrow's date** from the **End Date** field. Select **Manager Role** from the Role drop-down list.	
5	Click **Save & Close**. The application sends the delegation request to the other manager's Inbox.	

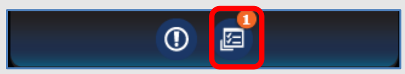
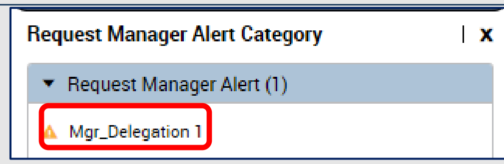
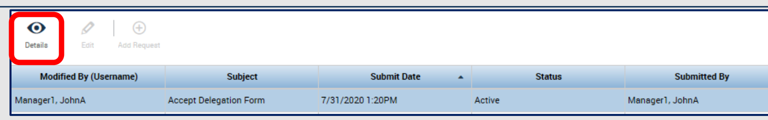
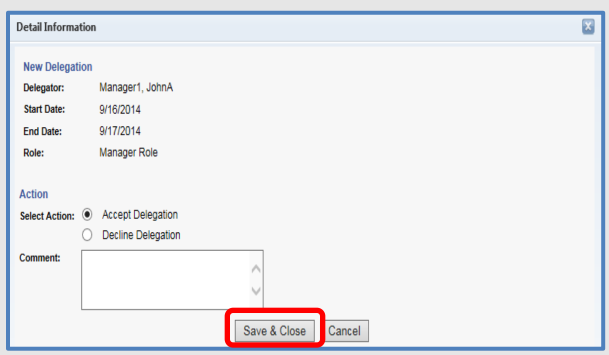
Accepting or Declining Backup Coverage Requests

When another manager sends you a request to cover his or her timekeeping and scheduling tasks, the application automatically places a task in your Inbox. The delegation request specifies the start and end dates and the role you will assume.

Exercise

For this exercise, log off as **Johnx.Manager#.** Log on as **Juniorx.Manager#.**

John Manager is going to be away attending a conference next week. He sent you a delegation request that you will review and accept.

Steps		
1	Select the **Request Manager Alert** icon to open it.	
2	Click on **Mgr_Delegation**. The **Manage My Requests** widget displays.	
3	Highlight the request and click the **Details** button.	
4	The **Accept Delegation** radio button is the default. The **Decline Delegation** may be selected. The **Comment** field is optional.	
5	Click **Save & Close**. **NOTE:** eSTART automatically sends a message to the delegator to confirm that you have accepted or declined the delegation request.	

NOTE

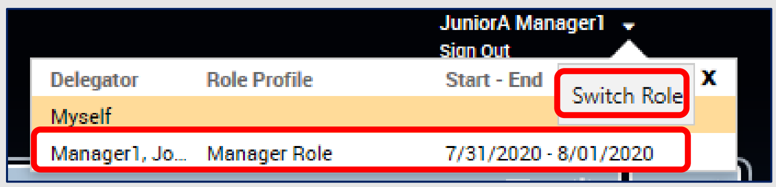
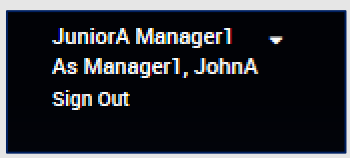
A message will also display from **My Inbox>Tasks.** The request may also be accepted or declined by double-clicking the request there.

Switching to Delegated Roles

After you accept a delegation request, the application automatically provides access to the tasks defined in the role profile on the specified start date. A Switch Role link displays as a quick link so that you do not have to log on as the manager who delegated the tasks to you. The link identifies which role you currently are working.

Exercise

John Manager delegated his tasks to you **(Junior Manager)** this week and you are ready to perform his timekeeping tasks. You do not need to log off as yourself and log on as the other manager because you may switch roles while logged on with your own user name and password.

Steps		
1	Click the **Switch Role** icon found just to the left of your username at the top of the Navigator window. **NOTE:** If you do not see the down arrow, log off and then log on again using your own user name and password.	
2	Click to select the manager whose tasks you will perform as his or her delegate.	
3	The username at the top of the Navigator now displays your name ***and*** the name of the person whose role you have assumed.	

NOTE

You may perform any management functions for the delegating manager. However, you may be able to view your own employee information, but you will not have the ability to edit or approve your own timecard, time off request, etc.

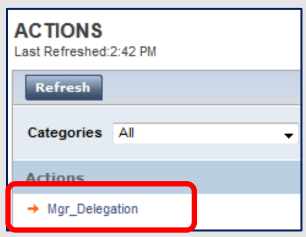
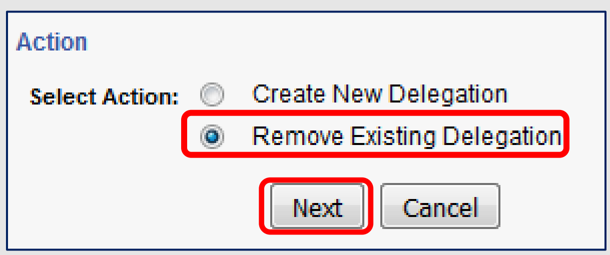
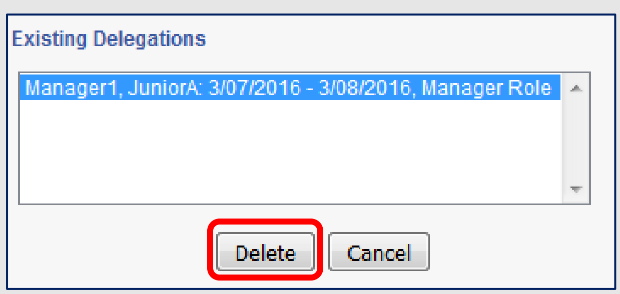
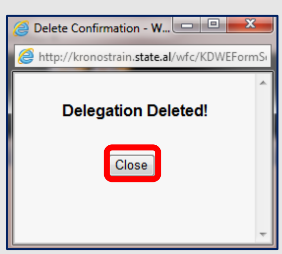
Cancelling the Delegation

The delegation rights automatically expire on the end date. However, you may end the delegation earlier if you wish.

Exercise

For this exercise, log off as **Juniorx.Manager#** and log back in as **Johnx.Manager#.**

You **(John)** had delegated your management tasks to **Junior Manager** for two days. However, you returned the next day, so you will cancel the delegation.

Steps		
1	From the **Related Items** pane, select **Temporary Delegation**.	
2	From the list of actions, select **Mgr_Delegation**.	
3	Select **Remove Existing Delegation**.	
4	Click **Next**.	
5	Select the existing manager delegation to be cancelled and click **Delete**.	
6	The **Delete Confirmation** message displays. Click **Close.** Junior will no longer have the option to switch role. He will receive an email message about the cancellation.	

Extended Leave for Managers

It is important that you consistently and accurately administer State of Alabama's leave policies. To make this happen, you need to manage employees paid and unpaid leave time in an efficient and timely manner. eSTART supports your ability to perform leave management tasks such as submitting leave cases for employees, reviewing leave cases and allocating/tracking leave amounts for an employee.

eSTART Leave:

- Automates the process of administering leave policies.
- Helps State of Alabama achieve compliance with required federal, state, and local mandates.

The Leave Process

The Leave process automates the administering and tracking of paid and unpaid leave policies. Managers may easily track both continuous and intermittent leave and add leave time against an employee's open leave case. In addition to centralizing administration of leave policies throughout State of Alabama, employees benefit from the consistent application of leave policies to individual leave cases.

Managing Leave

Exploring Leave Tools in eSTART

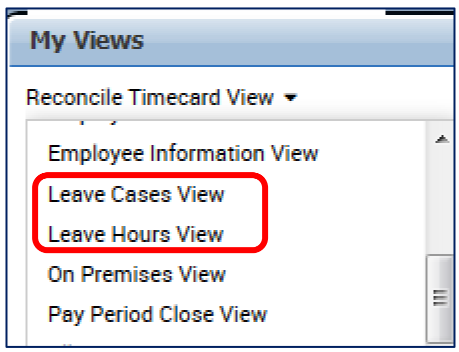
The navigator is your starting point for creating and maintaining your employees' time and leave information. There are two key tools below that help you to perform common leave tasks, such as entering your employees' leave takings and monitoring leave cases.

Accessing Leave Views

eSTART includes the following leave Views:

- Leave Cases View
- Leave Hours View

Either of these Views may be used as a starting point for viewing and monitoring employee leave cases. Leave Views are accessed from the same workspace that timekeeper views are accessed.

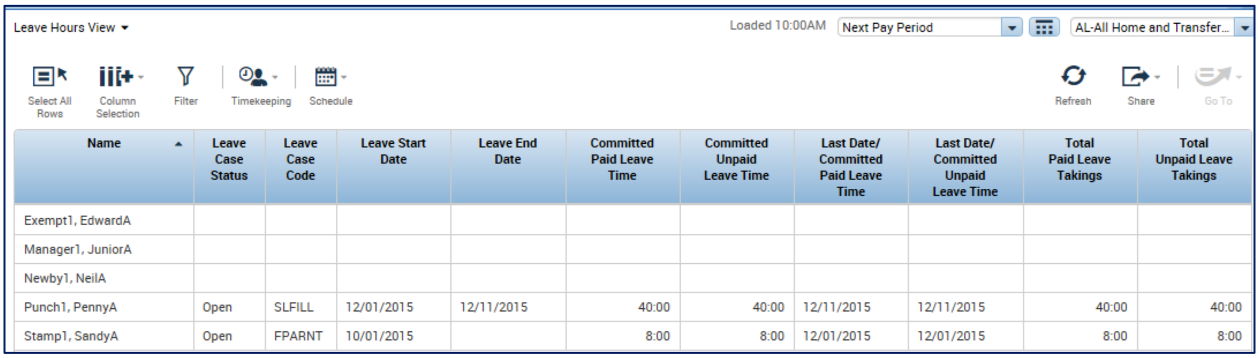


Exploring the Leave Hours View

The Leave Hours View is especially useful for viewing total leave hours. It also provides other information about each leave case in eSTART, including:

- Leave Case Status
- Last date of committed paid and unpaid leave time
- Leave end date (if one is provided)

Key Information in the Leave Hours View



Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	12/01/2015	12/11/2015	40:00	40:00	12/11/2015	12/11/2015	40:00	40:00
Stamp1, SandyA	Open	FPARNT	10/01/2015		8:00	8:00	12/01/2015	12/01/2015	8:00	8:00

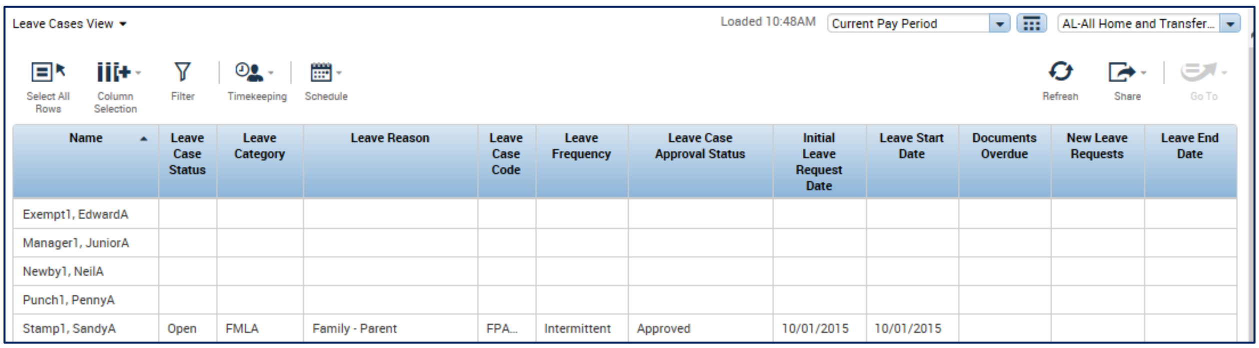
Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period, such as Open, Closed, Pending, Submitted, or Retracted.
Leave Case Code	Type of leave, such as Self or Family.
Leave Start Date	This is the first day that the employee takes leave.
Leave End Date	This is the employee’s expected return date.
Committed Paid/ Unpaid Leave Time	The Committed Paid Leave Time and Committed Unpaid Leave Time columns show the amount of paid and unpaid time that has been committed to the schedule or timecard in the selected time period.
Last Date/Committed Paid/Unpaid Leave Time	The Last Date/Committed Paid Leave Time and Last Date/Committed Unpaid Leave Time columns show the date of the last committed paid and unpaid amounts.
Total Paid/Unpaid Leave Takings	The Total Paid Leave Takings and Total Unpaid Leave Takings columns show the total amount of paid and unpaid leave that an employee has taken.

Exploring the Leave Cases View

The Leave Cases View is especially useful for viewing leave reasons and leave frequencies. It also provides other information about each leave case in eSTART including:

- Leave case status
- Leave category
- Initial leave request date

Key Information in the Leave Cases View



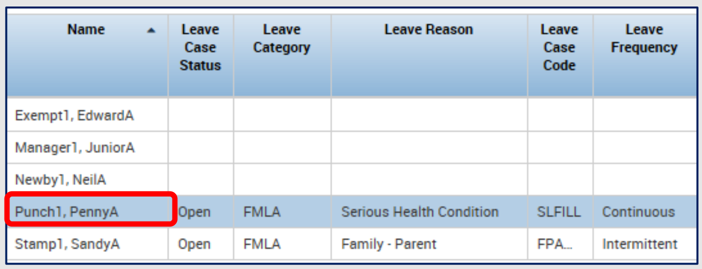
Column	Description
Leave Case Status	Status of a leave case, such as Open, Closed, or Submitted.
Leave Category	Type of leave, such as Self or Family.
Leave Reason	Indicates a more specific leave such as serious illness or birth.
Leave Case Code	Type of leave, such as Self or Family.
Leave Frequency	Indicates whether the employee is on continuous or intermittent leave.
Leave Case Approval Status	Indicates whether a leave request is approved, pending or denied.
Initial Leave Request Date	Date the leave request was made.
Leave Start Date	Date leave starts for an employee.
Documents Overdue	A check in this column indicates that a document is overdue.
New Leave Requests	A check in this column indicates additional time requested on an existing leave case.
Leave End Date	The expected date on which an employee returns to work.

Reviewing Leave Time in a Timecard

After leave has been approved and committed for an employee by your Leave Administrator, you may view those leave hours in your employee's timecard. Leave time displays differently than other pay codes in the timecard. Leave time displays in black text with the prefix "LV" and is not editable.

Exercise

Penny Punch is out on leave. You want to review her timecard to confirm that the leave hours are accurate. The **Leave Cases View** was selected in the previous exercise. Remain on this page.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Select Next Pay Period selected in the Time Period drop-down.
Select AL-All Home and Transferred-In from the Show drop-down.</td><td>
</td></tr>
<tr><td>2</td><td>Select Penny Punch then select Go To>Timecards.</td><td>
<table>
<tr><th>Name</th><th>Leave Case Status</th><th>Leave Category</th><th>Leave Reason</th><th>Leave Case Code</th><th>Leave Frequency</th></tr>
<tr><td>Exempt1, EdwardA</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Manager1, JuniorA</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Newby1, NeilA</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Punch1, PennyA</td><td>Open</td><td>FMLA</td><td>Serious Health Condition</td><td>SLFILL</td><td>Continuous</td></tr>
<tr><td>Stamp1, SandyA</td><td>Open</td><td>FMLA</td><td>Family - Parent</td><td>FPA...</td><td>Intermittent</td></tr>
</table></td></tr>
<tr><td>3</td><td>Review the leave takings in the timecard for the selected time period.
The LV entry describes the type of leave used.
The Totals tab provides a summary for the time period selected.
NOTE: FMLA cases use leave in a certain order, based on the type of case. See the Extended Leave Cascade job aid for this information.</td><td>
<table>
<tr><th>Date</th><th>Pay Code</th><th>Amount</th></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Wed 7/05</td><td>LV - SICK LEAVE TAKEN</td><td>8:00</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Thu 7/06</td><td>LV - ANNUAL LEAVE TAKEN</td><td>3:00</td></tr>
<tr><td></td><td>LV - SICK LEAVE TAKEN</td><td>5:00</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Fri 7/07</td><td>LV - ANNUAL LEAVE TAKEN</td><td>8:00</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Sat 7/08</td><td></td><td></td></tr>
<tr><td>Sun 7/09</td><td></td><td></td></tr>
<tr><td>Mon 7/10</td><td>LV - ANNUAL LEAVE TAKEN</td><td>2:00</td></tr>
<tr><td></td><td>LV - LEAVE WITHOUT PAY</td><td>6:00</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Tue 7/11</td><td>LV - LEAVE WITHOUT PAY</td><td>8:00</td></tr>
</table></td></tr>
</table>

NOTE

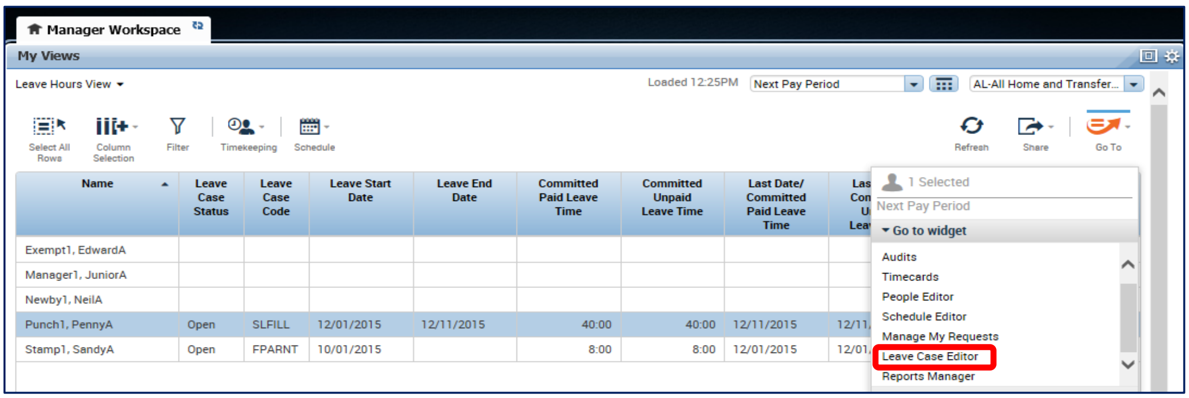
Contact your Leave Administrator to discuss any necessary modifications to an employee's leave hours.

Requesting Leave for an Employee

Occasionally, it is necessary to initiate a leave request for an employee who is unable to do so, for example, when an employee is already on sick leave.

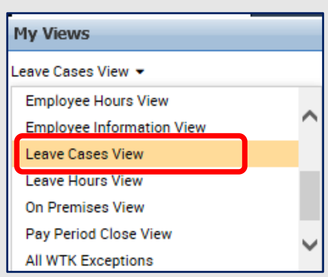
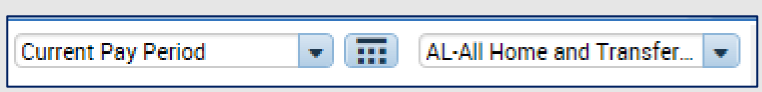
The **Leave Case Editor** is a tool in both Leave Views that allows you to electronically complete a request for leave on the employee's behalf. Once you submit the leave request, it is electronically sent to the Leave Administrator who will check the employee's eligibility and process the proper documentation.

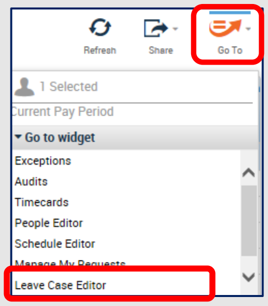
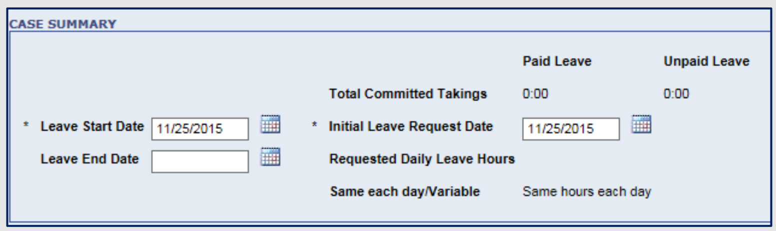
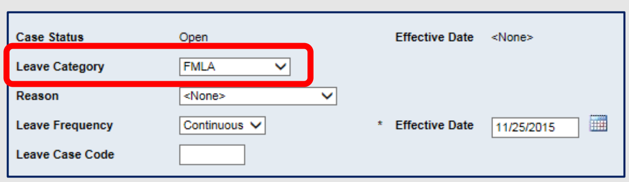
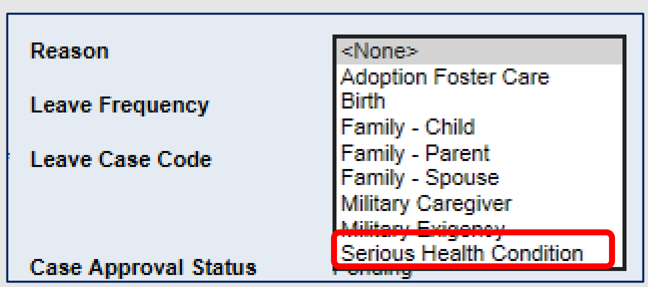
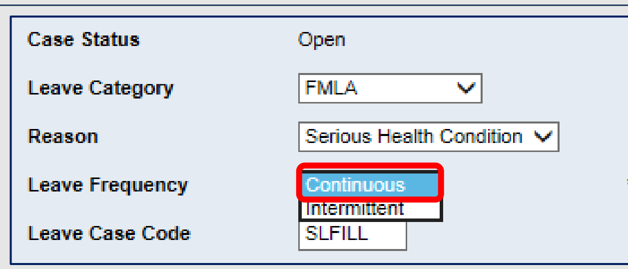
The Leave Case Editor may be accessed via the **Go To** menu in either the Leave Hours View or the Leave Cases View as illustrated below. The Leave Case Editor is also available from the **Related Items** pane.

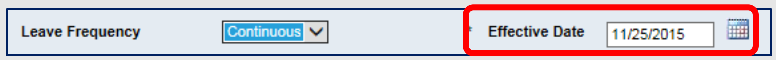
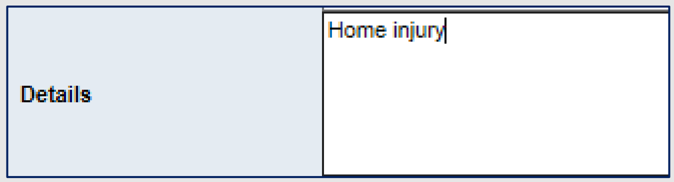
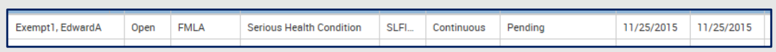


Exercise

Yesterday, employee, **Edward Exempt**, called to tell you that he will be unable to come to work due to an injury he sustained while working in his yard. He is unable to work and does not know when he will return. Edward has asked you to initiate a leave of absence request. You want to access **Edward Exempt's** record and **initiate a leave request** on his behalf.

Steps		
1	From the **My Views** drop-down, select **Leave Cases View.**	
2	From the Time Period drop-down list, select **Current Pay Period**. From the Show drop-down list, select **All Home and Transferred-In**.	

Steps		
3	Select **Edward Exempt** and then click **Go To>Leave Case Editor**.	
4	In the **Leave Start Date** field, enter the date the employee will begin the leave or select a date using the calendar icon. For this exercise, **today's date** is the default. Leave this date selected. In the **Initial Leave Request Date**, enter the date the employee requested leave or select a date using the calendar icon. For this exercise, **today's date** is the default. Leave this date selected.	
5	In the **Leave Category** field, accept the default value of **FMLA**.	
6	From the **Leave Reason** drop-down list, select the appropriate leave reason. For this exercise, select **Serious Health Condition**. **NOTE:** After selecting a reason, the **Leave Case Code** is automatically populated.	
7	From the **Leave Frequency** drop-down list, select the appropriate frequency of the employee's leave. For this exercise, select **Continuous**.	

Steps		
8	In the **Effective Date** field, leave **today's date** selected.	
9	In the optional **Temporary Mailing Address** field, enter a mailing address, if necessary.	
10	In the optional **Details** field, enter any other information that may be relevant to the leave request.	
11	Click **Save.**	
12	Close the **Leave Case Editor** tab. Refresh the Leave Cases View page to view the new case.	

NOTE

Initially the manager may not have all the information needed to open the leave case. Additional information may need to be added later.

Adding Leave Time to the Timecard

A manager may add a pay code to the timecard for an employee who has an <u>open and approved</u> FMLA or Military leave case. This must be verified BEFORE adding the pay code to the timecard of an employee.

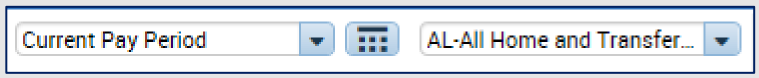
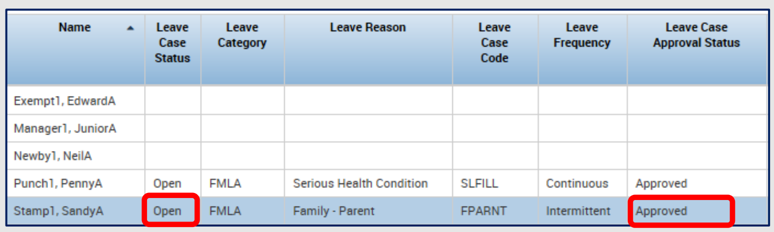
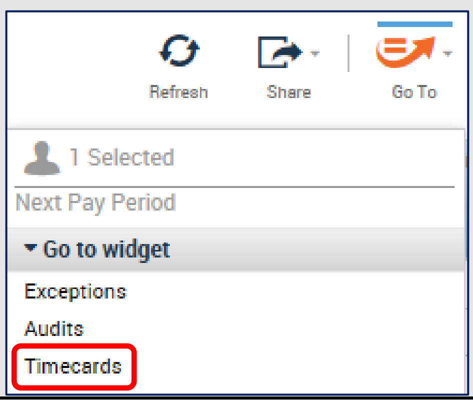
NOTE: Do not add these pay codes to an employee's timecard unless both conditions are met.

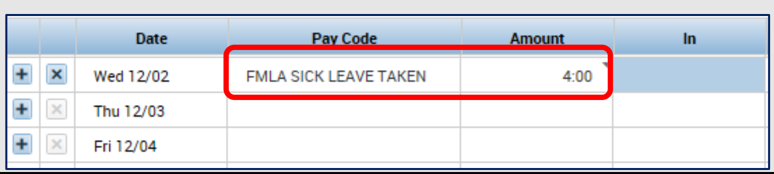
Exercise

Sandy Stamp has an <u>open and approved</u> intermittent leave case. She requested **four hours** of leave time for **Wednesday** of the current pay period to take her mother to physical therapy. Add the **FMLA Sick Leave Taken** pay code to her timecard.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Select the Leave Cases View.

From the Time Period drop-down list, select Current Pay Period.

Select All Home and Transferred-In from the Show drop-down.</td><td>
</td></tr>
<tr><td>2</td><td>From Leave Cases View, verify that Sandy has an open and approved leave case from the Leave Case Status and Leave Case Approval Status columns.</td><td>
</td></tr>
<tr><td>3</td><td>Select Go To>Timecards link.</td><td>
</td></tr>
<tr><td>4</td><td>From the Pay Code drop-down in the Timecard, select FMLA Sick Leave Taken.

Save the timecard.</td><td>
</td></tr>
</table>

Committing Leave Time to the Timecard

The **Quick Leave Editor** is another tool that allows you to enter leave time for an open leave case, especially an employee who has ongoing doctor's appointments or physical therapy. The **Quick Leave Editor** lets you view, add, and modify leave time that was previously entered using the **Leave Case Editor**.

Exercise

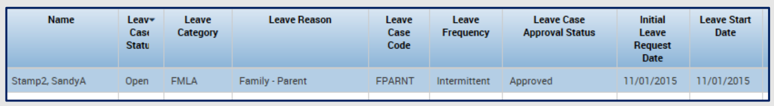
Sandy Stamp has an open and approved intermittent leave case. She requested **four hours** of leave time for **Wednesday** of the next pay period to take her mother to physical therapy. You want to use the **Quick Leave Editor** to enter and commit the intermittent leave time to her timecard.

Steps

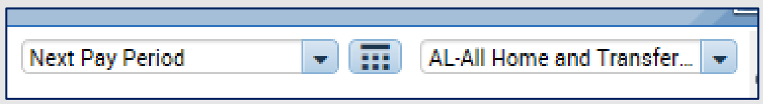
1 From any **My Views** widget or **Related Items>Quickfind**, select **Sandy Stamp.**

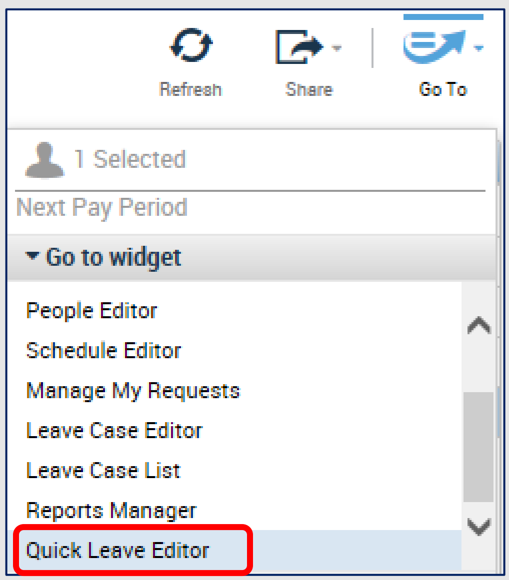
From the **Time Period** drop-down list, select **Next Pay Period**.

Select **Go To>Quick Leave Editor.**

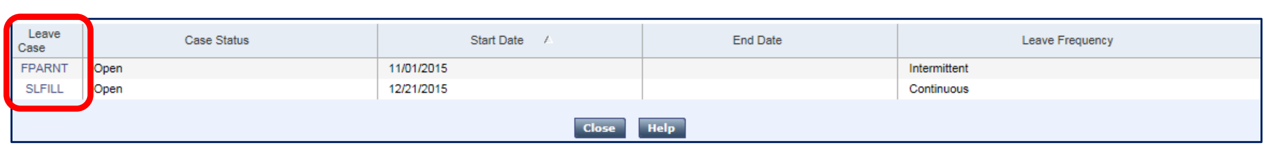


Name	Leave Case Statu	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date
Stamp2, SandyA	Open	FMLA	Family - Parent	FPARNT	Intermittent	Approved	11/01/2015	11/01/2015





NOTE: If the employee has more than one active leave case, the window below will display. Select the applicable leave case by clicking the link in the **Leave Cases** column.



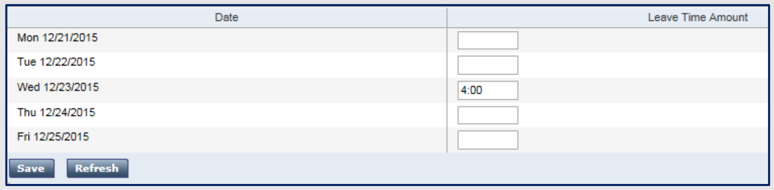
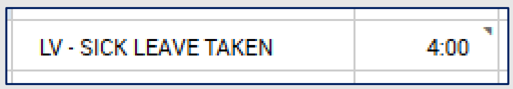
Leave Case	Case Status	Start Date	End Date	Leave Frequency
FPARNT	Open	11/01/2015		Intermittent
SLFILL	Open	12/21/2015		Continuous

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>2</td><td>The Leave Case Editor will display.

In the Leave Time Amount column, click the cell for the applicable day(s) and enter 4 leave time hours.

NOTE: The number of hours must always be entered in <u>15-minute increments</u>.

Hours for multiple days may be entered if needed.

Click Save.</td><td>
</td></tr>
<tr><td>3</td><td>To review the time from the timecard, select Go To>Timecards.</td><td>
</td></tr>
</table>

NOTE

The pay codes may also be added directly to the timecard, or you may contact your Leave Administrator if you are unable to commit the time. Pay codes added directly to the timecard will have the prefix of **FMLA** or **Military**, depending on the type of case. Pay codes added using the process above or by the Leave Administrator will have an **LV** prefix.

Also, an employee may request the time by submitting a time off request, provided he/she has an open and approved extended leave case. The available selections will vary based on the type of leave case. See the **Employee Pay Codes for Time Off Requests** job aid for a list of these pay codes.

Generating Leave Reports

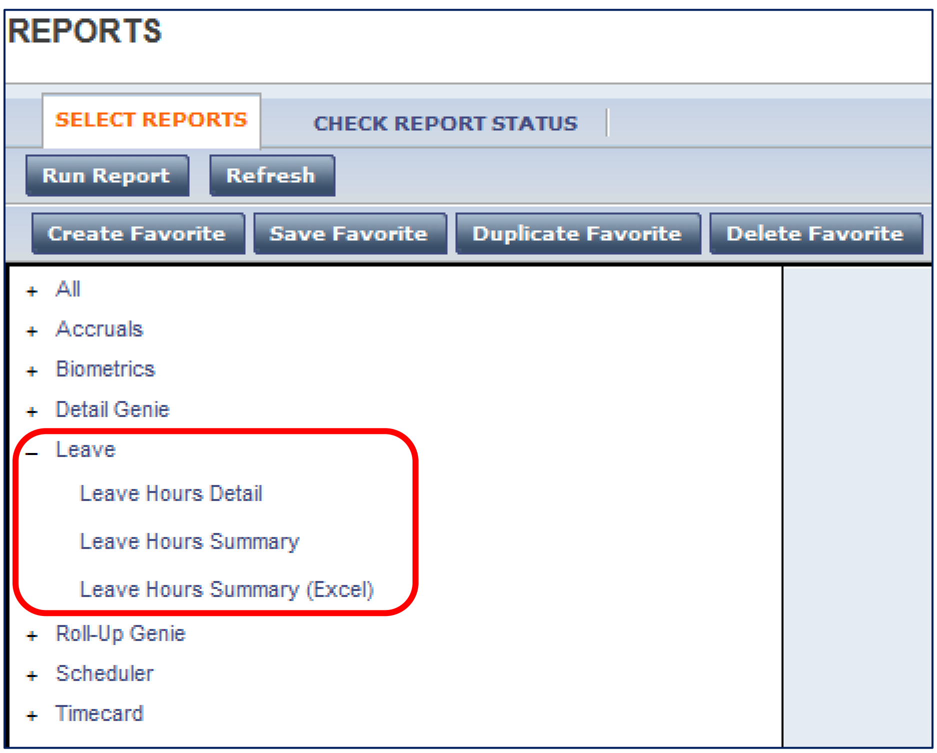
Employee leave information is available in several different leave reports. You may generate leave reports on a daily, weekly, or pay-period basis, or any time you need information to accomplish your business tasks. For example, you may generate the Leave Hours Detail report to review the types of leave hours for each shift that has been committed to an employee's timecard.

Leave reports are generated in the same way as other reports, using the process described in the Reports Manager section of this guide.

Types of Leave Reports

The **Leave Hours Detail** report lists detailed leave information for employees with open or closed leave cases for the requested time period.

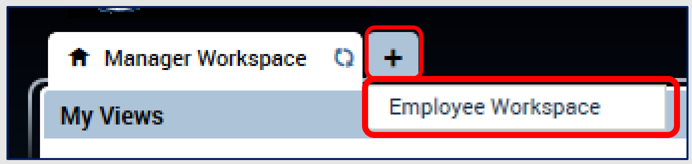
The **Leave Hours Summary** report lists, for each employee, all open or closed leave cases in the requested time period, as well as any requested leave cases in the requested time period.



Using the Employee Workspace

Sometimes you will need to access your own employee records. For example, you will need to submit your own requests for time off as an employee. To access your time and calendar data, you have access to a workspace called the **Employee Workspace**. You have fewer rights when accessing your own information than when accessing your employees' records.

Accessing the Employee Workspace

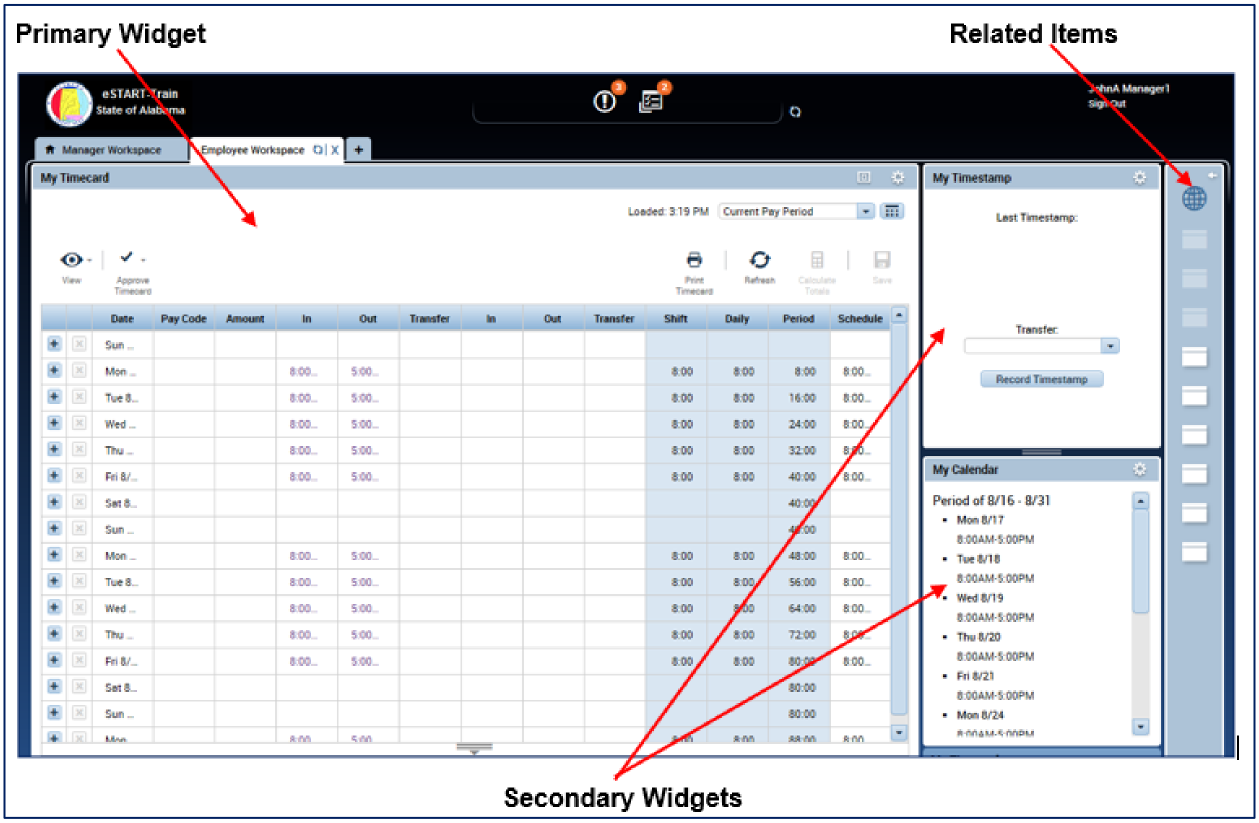
Steps		
1	To access the **Employee Workspace,** click the **Add Workspace (+)** tab to the right of the **Manager Workspace** tab.	
2	Select the **Employee Workspace** option.	

From this workspace you have access to:

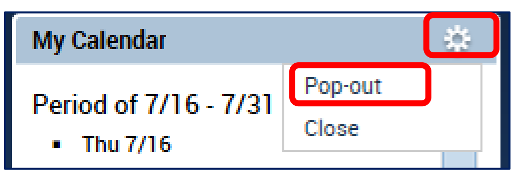
- My Timecard
- My Timestamp
- My Calendar
- Audits
- Change My Password
- My Activities (not used)
- My Extended Leave Requests
- My Inbox
- My Reports

Primary and Secondary Widgets

The **Employee Workspace** includes three default widgets as well as a **Related Items** pane. These widgets can be in a primary position or secondary position. In most cases, you will work in the primary widget.

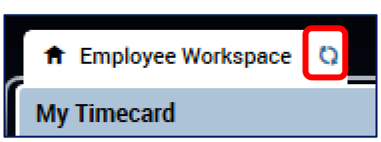


You can move a secondary widget into the primary position by clicking the gear icon in the upper-right corner of the widget and selecting **Pop-out**. The current primary widget will shift into the secondary widget position. Other available widgets may be accessed from the **Related Items** pane.



Restoring the workspace

After selecting one of the secondary widgets, the **Refresh** icon on the **Employee Workspace** tab may be used to return the workspace to the timecard view.

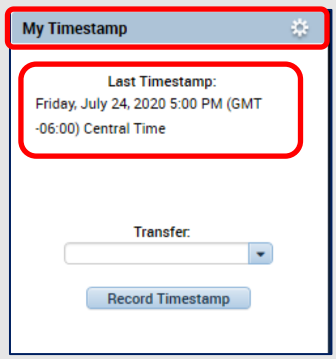
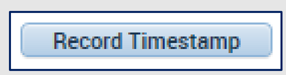
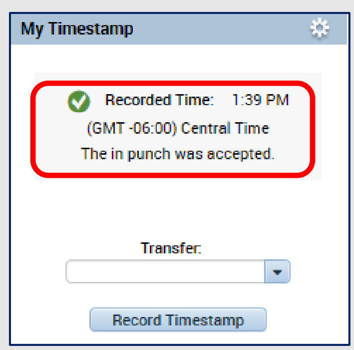
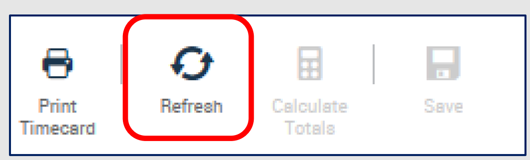


Using My Timestamp

If you are an employee who is required to punch from your workstation, you will use the **My Timestamp** widget to record your punches during your shift.

Exercise

You want to record a punch for the start of your shift.

Steps		
1	Locate the **My Timestamp** widget. **NOTE:** The date and time of the last recorded timestamp displays on the **My Timestamp** widget.	
2	Click the **Record Timestamp** button.	
3	A message displays indicating whether the punch was accepted.	
4	The punch will not immediately display in the timecard. After a few seconds, select the **Refresh** button to update the timecard.	

NOTE
There is a separate URL for the **Quick Time Stamp** application. This allows employees to quickly perform their time stamp without logging into the eSTART production application.

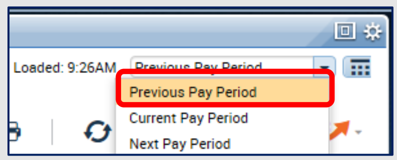
https://estart.alabama.gov/wfc/applications/wtk/html/ess/quick-tslite.jsp

Reviewing and Approving your Time using My Timecard

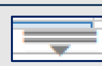
Your primary widget is your timecard. You will use the **My Timecard** widget to review your timecard and approve your time for the pay period. eSTART allows you to electronically sign by “Approving” the document.

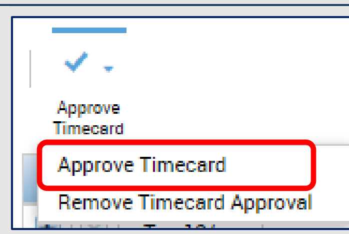
Exercise

You want to review your timecard and approve it for the **Previous Pay Period**.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Verify that My Timecard is the primary widget.</td><td></td></tr>
<tr><td>2</td><td>Select Previous Pay Period to review.</td><td>
</td></tr>
<tr><td>3</td><td>Review your timecard and notify your manager if any exceptions are present.

NOTE: You do not have rights to edit your own punches.</td><td>Blue = Excused Absence
Red = Exception (see manager before approving)
Green = Manager has marked as reviewed
 = Manager has added a comment
Purple = Populated by eSTART</td></tr>
<tr><td>4</td><td>Select the tab at the bottom of the page to open the lower portion of the screen.

Review the Totals section of the timecard, which contains the breakdown of your worked and non-worked time.</td><td>
Totals | Accruals | Historical Corrections | Audits
All | All
<table>
<tr><th>Account</th><th>Pay Code</th><th>Amount</th></tr>
<tr><td>001/0000/100010/10001/10586/-/-</td><td>COMP TIME EARNED 1.5</td><td>0:30</td></tr>
<tr><td>001/0000/100010/10001/10586/-/-</td><td>HOLIDAY EARNED</td><td>8:00</td></tr>
<tr><td>001/0000/100010/10001/10586/-/-</td><td>HOLIDAY TAKEN</td><td>8:00</td></tr>
<tr><td>001/0000/100010/10001/10586/-/-</td><td>REGULAR</td><td>80:00</td></tr>
</table></td></tr>
<tr><td>5</td><td>Once the manager has made any corrections and the totals are correct, you may approve your timecard.

To approve your timecard for the selected time period, click the Approve Timecard drop-down and select Approve Timecard.</td><td>
</td></tr>
<tr><td>6</td><td>Timecard is Approved message temporarily displays at the top of the widget and the color of the timecard changes to light tan.</td><td>Information Timecard Approved by PennyA.Punch5 11/05/2015 8:58AM
<table>
<tr><td>Mon 7...</td><td></td><td></td><td>8:00AM</td><td>12:00PM</td><td></td><td>1:00PM</td><td>5:00PM</td><td></td><td>8:00</td></tr>
<tr><td>Tue 7/...</td><td></td><td></td><td>8:00AM</td><td>12:00PM</td><td></td><td>1:00PM</td><td>5:00PM</td><td></td><td>8:00</td></tr>
<tr><td>Wed 7/...</td><td></td><td></td><td>8:00AM</td><td>12:00PM</td><td></td><td>1:00PM</td><td>5:00PM</td><td></td><td>8:00</td></tr>
<tr><td>Thu 7/...</td><td></td><td></td><td>8:00AM</td><td>12:00PM</td><td></td><td>1:00PM</td><td>5:00PM</td><td></td><td>8:00</td></tr>
<tr><td>Fri 7/22</td><td></td><td></td><td>8:00AM</td><td>12:00PM</td><td></td><td>1:00PM</td><td>5:00PM</td><td></td><td>8:00</td></tr>
</table></td></tr>
</table>

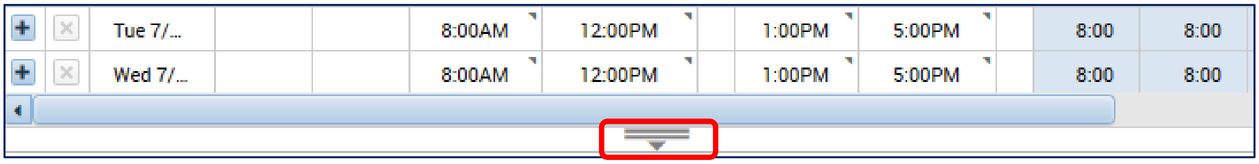
Selection Menu Options on the My Timecard widget

Timecard Options	Description
View	Use this option to view only days with exceptions in the timecard.
Approve Timecard	Use this option to approve the timecard or to remove approval.
Print Timecard	This feature allows the information from the timecard to be printed.
Refresh	Updates the timecard with the most current data. It is most used to update the timecard after using the Timestamp.
Calculate Totals	This option is disabled and not available for all employees.
Save	This option is disabled and not available for all employees.

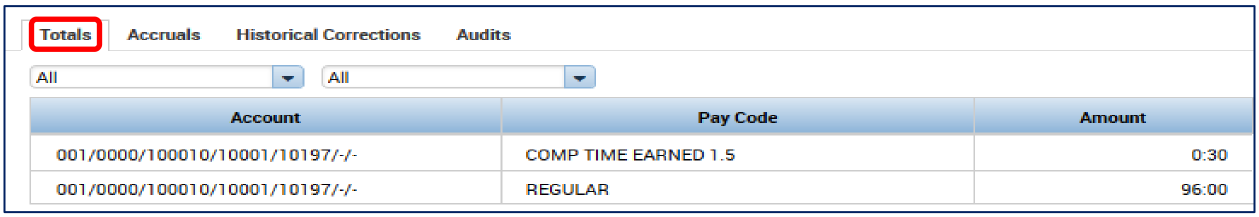
NOTE
A reminder to approve timecards will be sent to your inbox the day after the end of the pay period. Users who have an Agency email account will also receive these messages in their mailboxes.

The Totals Area of My Timecard Widget

Click the gray tab in the lower section of the timecard view to expand the **Totals** section of the timecard.

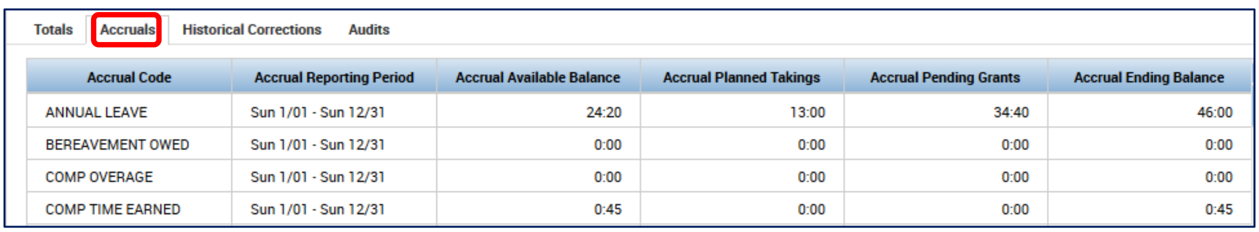


The **Totals** tab displays the overall timecard totals and how the employee hours are tracked.



Account	Pay Code	Amount
001/0000/100010/10001/10197/-/-	COMP TIME EARNED 1.5	0:30
001/0000/100010/10001/10197/-/-	REGULAR	96:00

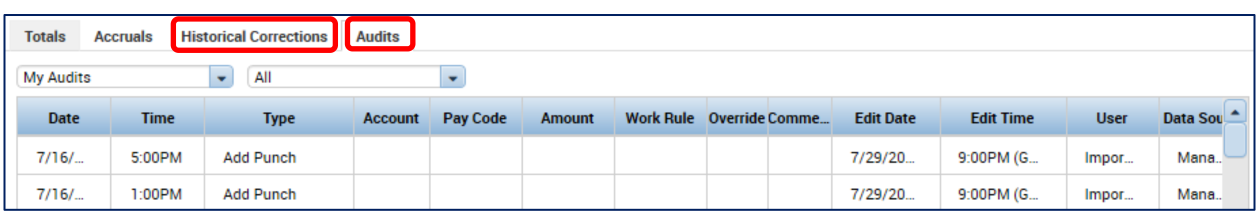
The **Accruals** tab displays accrual codes and available leave balances based on the date selected. Accrual balances may also be viewed from the **My Accruals** widget.



Accrual Code	Accrual Reporting Period	Accrual Available Balance	Accrual Planned Takings	Accrual Pending Grants	Accrual Ending Balance
ANNUAL LEAVE	Sun 1/01 - Sun 12/31	24:20	13:00	34:40	46:00
BEREAVEMENT OWED	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
COMP OVERAGE	Sun 1/01 - Sun 12/31	0:00	0:00	0:00	0:00
COMP TIME EARNED	Sun 1/01 - Sun 12/31	0:45	0:00	0:00	0:45

Accruals Tab	Description
Accrual Code	The type of accrual balance, such as Annual Leave or Sick Leave.
Accrual Reporting Period	The leave reporting period (current year).
Accrual Available Balance	The accrual balance from the payroll system as of the date in the **As of** drop-down.
Accrual Planned Takings	The total amount of time scheduled to be taken, from the **As of** date through the end of the Reporting Period (12/31).
Accrual Pending Grants	The total accruals projected from the **As of** date through the end of the Reporting Period (12/31). The projections assume the employee will work the appropriate number of hours to earn the accruals.
Accrual Ending Balance	The accrual balance as of December 31st, including Pending Accruals and Planned Usages.

The **Historical Corrections** tab is for viewing historical corrections. The **Audits** tab is for viewing any audit trail information.

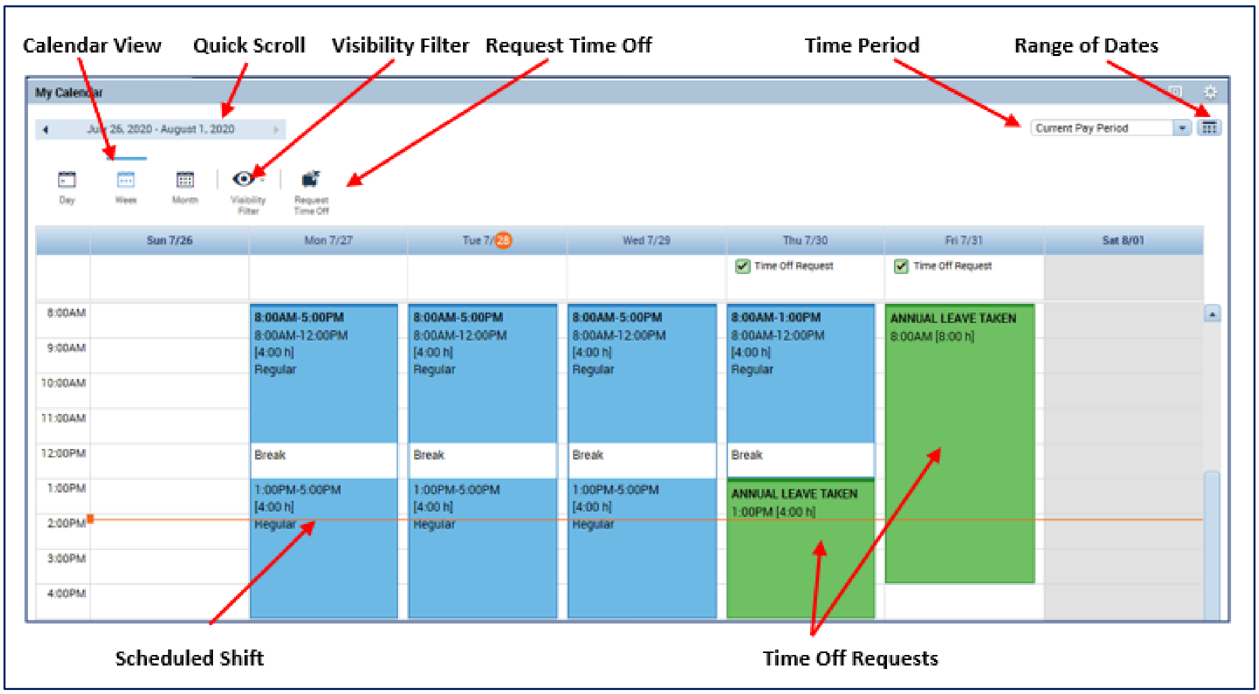


Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comme...	Edit Date	Edit Time	User	Data Sou
7/16/...	5:00PM	Add Punch							7/29/20...	9:00PM (G...	Impor...	Mana...
7/16/...	1:00PM	Add Punch							7/29/20...	9:00PM (G...	Impor...	Mana...

Viewing My Calendar

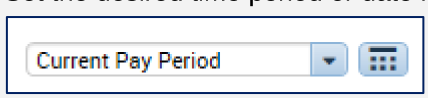
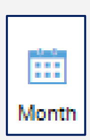
The **My Calendar** widget is used to view your schedule information and to view and request time off. You can hover over a shift to view more detailed information. You may also change the calendar view and use the filter at the top to show and hide certain item types in the calendar.

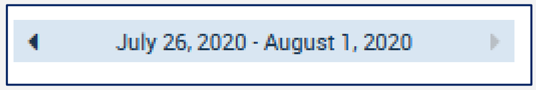
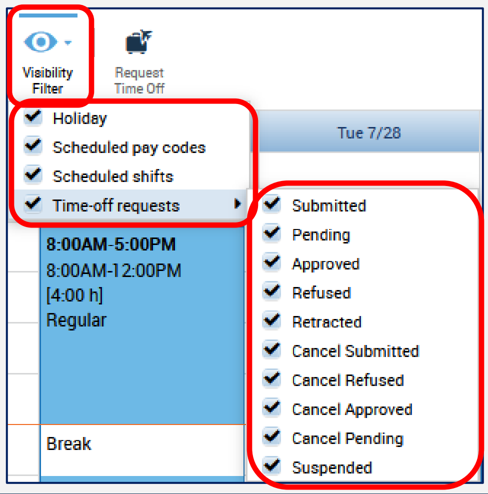
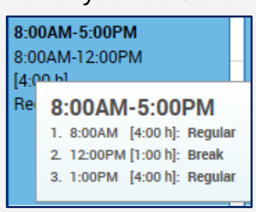
The following illustration shows a week view.



Navigating in the Calendar

The following table describes the actions that display information in a calendar for data analysis:

Action	Step
Time Period/Range of Dates	Set the desired time period or date range. 
Calendar View	Select  to view one day across the screen. Select  to view one week across the screen (default). Select  to view one month across the screen.

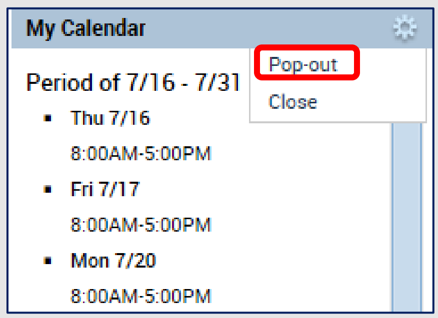
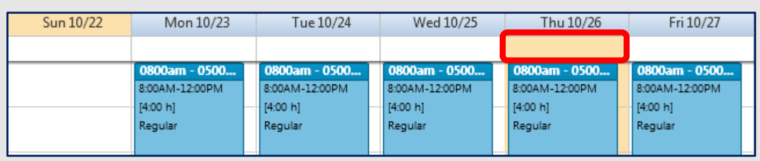
Action	Step
Quick Scroll	Scroll to the previous or next week. 
Visibility Filter	Select the **Visibility Filter** to display or hide elements such as time off requests, holidays, scheduled pay codes, or scheduled shifts. Uncheck an item to remove it from the display. 
Request Time Off	Select  to submit a Time Off Request.
Scheduled Shift	Hover your cursor over a shift to view details of the shift. 
Time Off Requests	Requests display in the calendar once they are approved.

Requesting Time Off Using the My Calendar Widget

The **My Calendar** widget displays your schedule for the current pay period as well as previous and subsequent pay periods. It also provides a consistent, easily accessible way to request or cancel time off. eSTART forwards the requests to your manager to handle appropriately.

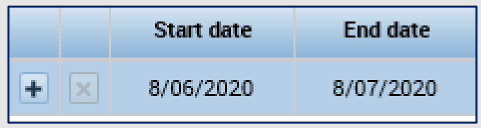
Exercise

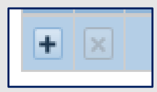
Your childcare provider will be unavailable next Thursday and Friday and you will need to take the afternoons off. Submit a time-off request for **four hours** of **Annual Leave** each day starting at **1 p.m. for next Thursday and Friday**.

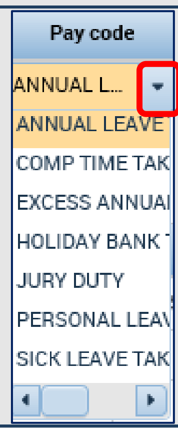
Steps		
1	In the Employee Workspace, locate the **My Calendar** widget. **NOTE:** This widget may still be open from the previous exercise. If so, skip to step 3.	
2	Click the gear icon on the **My Calendar** widget and select **Pop-out**.	
3	Select the **Time Period** that includes next Thursday and Friday.	
4	Click in the area circled in red to select the start date.	
5	Click **Request Time Off.**	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>6</td><td>The Request Time Off window displays.

Confirm that the Start and End Dates are correct. Click in the field of each date to edit, if needed.

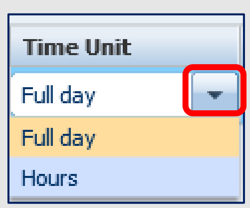
NOTE: The “+” can be used to insert another row for additional leave. See the Tip below before using this function.</td><td>

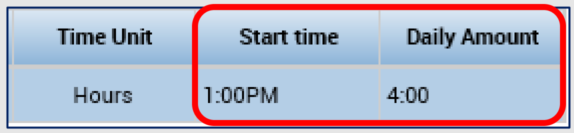
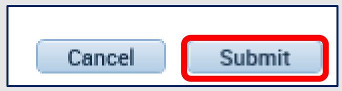
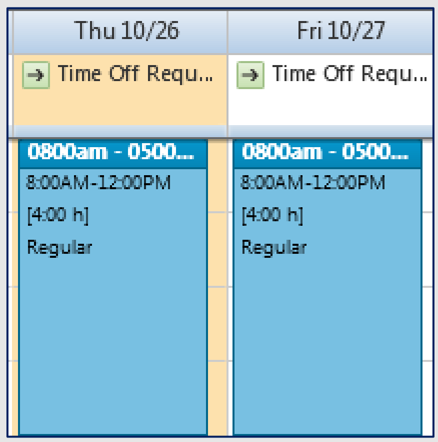
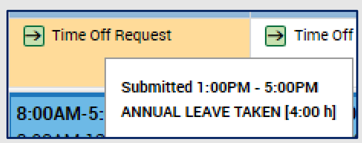
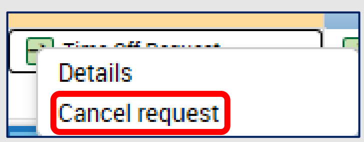
</td></tr>
<tr><td>7</td><td>Verify your leave accrual balances.</td><td>
<table>
<tr><th>Accrual</th><th>Balance</th></tr>
<tr><td>ANNUAL LEAVE</td><td>11:15 Hour</td></tr>
<tr><td>BEREAVEMENT OWED</td><td>0:00 Hour</td></tr>
<tr><td>COMP OVERAGE</td><td>0:00 Hour</td></tr>
</table></td></tr>
<tr><td>8</td><td>Select the Pay code from the drop-down list.

NOTE: Use the scroll bars or hover the mouse pointer over the pay code to view the entire description.</td><td>
</td></tr>
<tr><td>9</td><td>Select a Time Unit.

If you select Full Day, your scheduled hours will be used to determine the amount of time charged for each day. Continue to Step 12.

If you select Hours, you must specify a Start time and Daily Amount for the leave time to be used for each requested day. Continue to step 10.
NOTE: <u>These fields must be entered in 15-minute increments.</u>

For this exercise, select Hours.</td><td>
</td></tr>
</table>

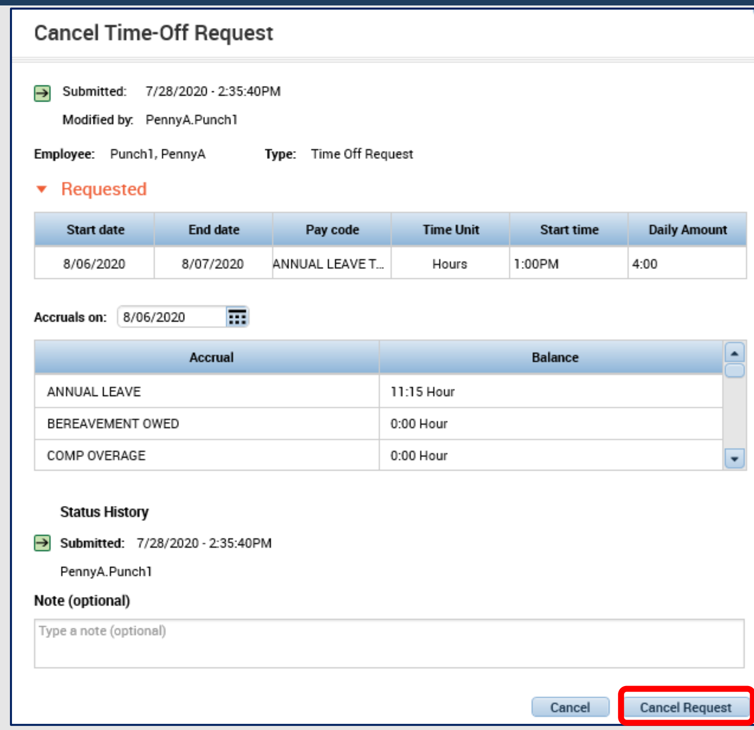
Steps		
10	Enter the **Start time** (with am/pm) for the leave and the number of hours requested in the **Daily Amount** field.	
11	(Optional) Enter **Notes** for the request.	
12	Click **Submit**.	
13	The request has been submitted for approval and displays in the employee's calendar with the **Submitted** (arrow) icon. **NOTE**: Once the requested time is approved by your manager, the schedule will automatically be updated to show only the scheduled leave time for the requested days.	
14	Hover on the green **Submitted** arrow icon to see a pop-up of the request details. Right-click the green arrow for an Options menu. • Select **Details** to see the details of the request. 5. Select **Cancel Request** to cancel or retract the request.	

Steps

15 The **Cancel Time-Off Request** page displays.

Enter **Notes** if needed.

Then click the **Cancel Request** button.



Request Symbols

The symbols below will display on the request in the calendar, indicating the status of the request.

	Submitted - for approval **or** cancellation
	Retracted - prior to manager approval
	Approved - for taking **or** for cancellation
	Pending
	Refused

Best Business Practice

All requests for time off should be submitted through the time clock or eSTART application.

Submit multiple requests whenever a request spans across unscheduled workdays to prevent the request from displaying in the timecard with zero hours for those days. A request that spans a holiday will result in the leave being charged on that day, which would require cancelling and resubmitting the request.

An employee who is not assigned to a work schedule should always select **Hours** when submitting a leave request. Since there is no assigned schedule, selecting **Full Day** will result in errors.

Tip

Cancelled requests must be approved by your manager.

You cannot cancel part of a request. All days associated with a request are cancelled. For example, if you originally requested three days off and then decide you only need two days, you must cancel the original request and submit a new request for two days.

Also, using the "+" selection to add another row will allow you to enter multiple requests with one entry. But all requests entered this way will be grouped together and if one must be cancelled, all will be cancelled. It is more efficient to enter separate requests.

NOTE

Employees have access to specific pay codes when submitting a time off request. Additional selections are available if the employee has an open and approved extended leave case. The selections will vary based on the type of leave case. See the **Employee Pay Codes for Time Off Requests** job aid for a list of these pay codes.

Annual Leave Cascade

A cascade defines how leave time is processed in the system. **If the employee does not directly select Comp Time, Excess Annual Leave, etc. when submitting their request, but selects Annual Leave instead,** their leave will be used, based on the time of the year, in the order as described in the chart below:

Annual Leave Cascade	
January 1 – July 31	**August 1 – December 31**
Comp Time	Personal Day
Excess Annual Leave	Excess Annual Leave
Annual Leave	Comp Time
	Annual Leave

NOTE

The following are not impacted by the cascade:

- Follow your agency's policy and procedures regarding the usage of personal leave days before August 1st.
- Your holiday banked time may be scheduled by your supervisor in the quarter in which it was earned.

If the cascade makes a change to the type of leave originally submitted, the timecard will display the information as indicated below.

In this example, the original request was for two hours of annual leave. Since the employee had one hour of Comp Time and had Excess Annual Leave time, the cascade reversed the original request for annual leave, used the Comp Time first, then the Excess Annual Leave.

ANNUAL LEAVE CASCADE	-2:00					
COMP TIME CASCADE	1:00					
EXCESS ANNUAL CASCADE	1:00					
		7:29AM	1:31PM		6:00	
ANNUAL LEAVE TAKEN	2:00	1:30PM				8:00

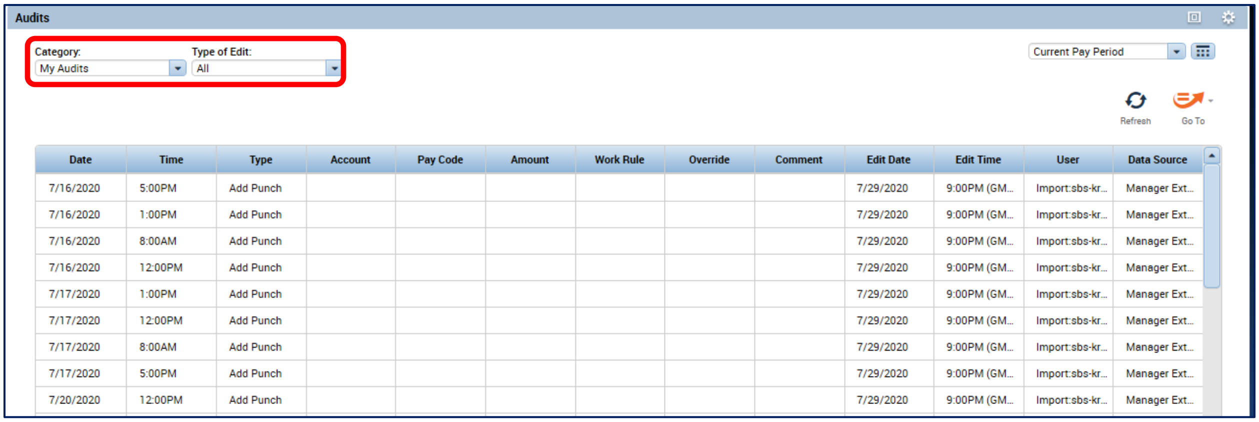
A comment is added to each entry in the timecard to indicate the change was made by the cascade. These comments may be viewed from **Go To>Audits.** Select **Comments** from the **Category** drop-down to view the comments.

Date	Time	Type	User	Comment
Wed 3/23	6:29AM	Punch		Early - Approved
Fri 3/25		Pay Code Edit	Import	Cascade Change
		Pay Code Edit	Import	Cascade Change
		Pay Code Edit	Import	Cascade Change

Audits

The **Audits** tab is located on the **Related Items** pane. All timecard changes are logged here for audit purposes, including timecard approval. The page also lists punches made from timestamping.

The **Category** and **Type of Edit** drop-down lists may be used to filter the information in the audit log.

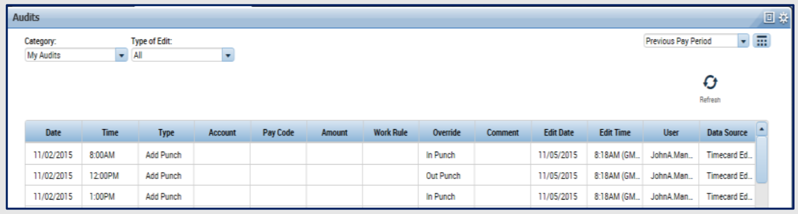
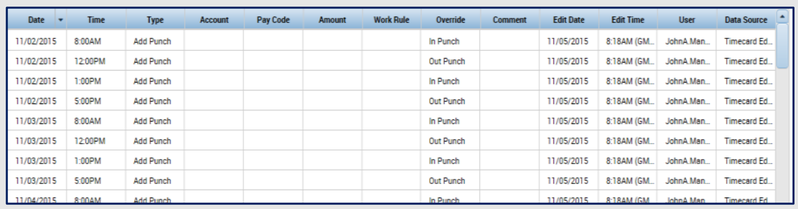
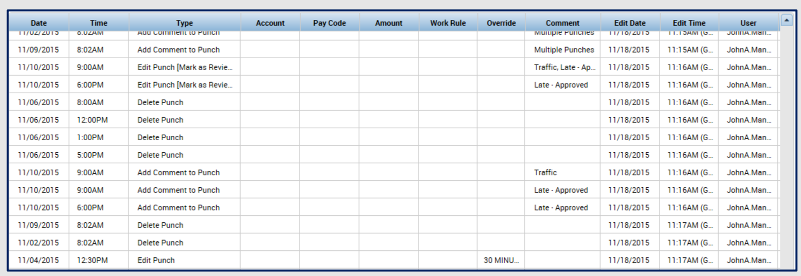


Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time	User	Data Source
7/16/2020	5:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/16/2020	1:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/16/2020	8:00AM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/16/2020	12:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/17/2020	1:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/17/2020	12:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/17/2020	8:00AM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/17/2020	5:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...
7/20/2020	12:00PM	Add Punch							7/29/2020	9:00PM (GM...	Import:sbs-kr...	Manager Ext...

Column	Description
Date/Time	The original date/time of the entry.
Type	The type of edit that was performed.
Account	The account to which the edit is attributed, if different from the primary account.
Pay Code/Amount	The pay code and number of hours assigned, if applicable.
Work Rule	The work rule used with the edit, if different from the employee’s primary work rule.
Override	The type of entry that this edit is replacing or cancelling, if applicable.
Comment	The comment attached to the edit.
Edit Date/Time	The effective date and time of the edit.
User	The user name of the person who edited the transaction.
Data Source	The component of the application where the edit occurred.

Exercise

You want to review all manual edits that have been made to your timecard.

Steps		
1	From the **Related Items** pane, select **Audits**.	
2	**My Audits** is the default selection in the Category drop-down. **All** is the default selection from the **Type of Edit** drop-down list. Other types may be selected to narrow the results. However, do not change the options for this exercise.	
3	View the results.	
4	Scroll down to the bottom of the list to view the changes made to the timecard.	
5	To close the **Audits** widget, hover your cursor over the **Audits** tab and then click the **X**.	

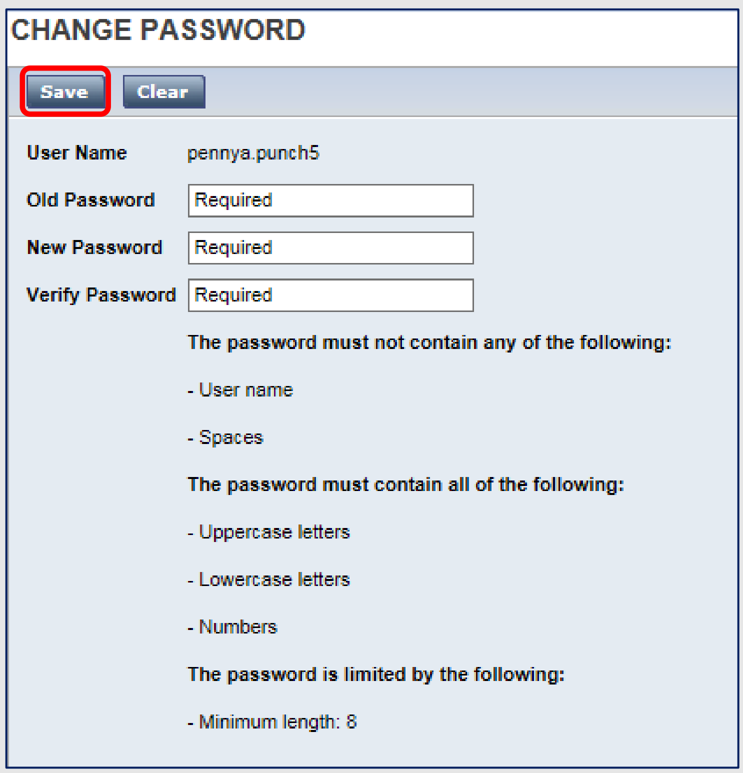
Changing Your Password

If you have a Network/Email ID, your Logon ID is your email address; your password is your network password. **Do not** use the Change Password widget in eSTART. Contact your agency Help Desk/IT staff to change your password.

If you do **not** have an email address, your Logon ID will be **firstname.lastname** and your initial password will be **P@ssw0rdxxx** (xxx = your agency number). You are required to change your password at first login. Then you will use the Change Password widget to change your password.

Exercise

Follow the steps below to change your password.

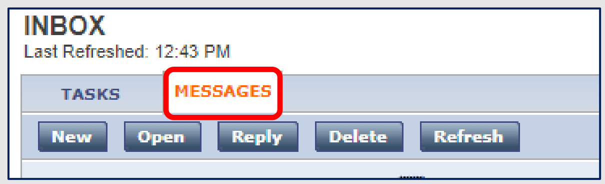
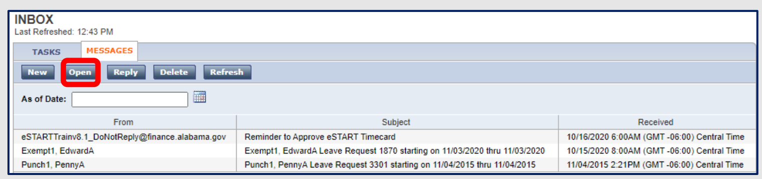
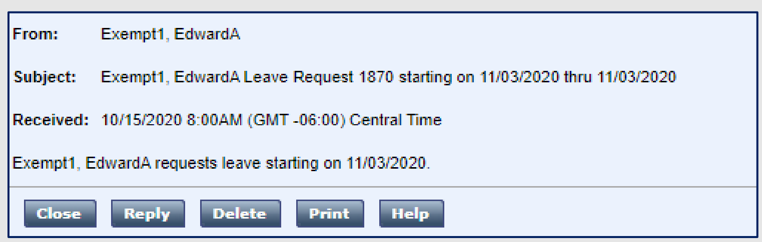
Steps		
1	From the **Employee Workspace**, open the **Related Items** pane and select **Change My Password**.	
2	In the **Old Password** field, enter the password you want to replace.	
3	In the **New Password** field, enter the new password.	
4	In the **Verify Password** field, re-enter the new password.	
5	Click **Save**.	

Using My Inbox

When you submit a request for time off, the manager's response displays in your eSTART Inbox. You can review these messages in **My Inbox**.

Example

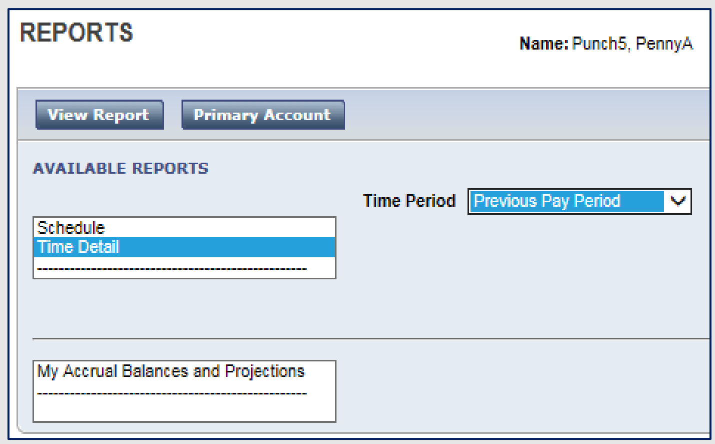
You want to review any messages you have received in eSTART.

Steps		
1	Select **My Inbox** from the **Related Items** pane.	
2	Select **Messages** tab to review your messages.	
3	To read a message, select the message and click **Open**.	
4	After you have reviewed the message, select one of the following: • Click **Reply** to respond to the message. • Click **Close** to close the message and return to the Inbox. • Click **Delete** to remove the message from the Inbox. • Click **Print** to print the message to your local printer. Select **Close**.	
5	To close the **My Inbox** widget, hover your cursor over the **My Inbox** tab and then click the **X**.	

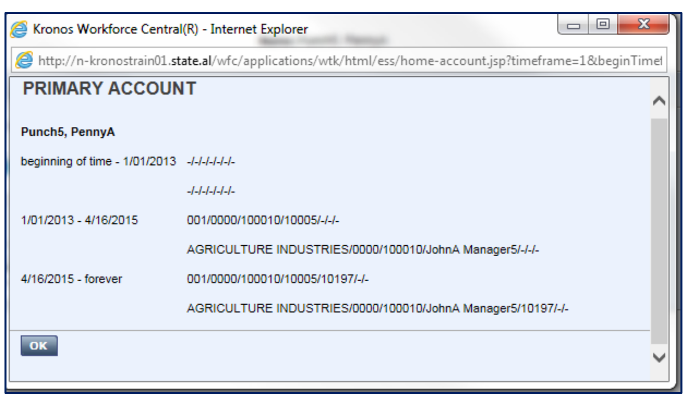
Using My Reports

There may be times when you would like to print information such as your leave accrual balances, schedule or timecard data. eSTART provides three employee reports for this information using the **My Reports** widget. When **View Report** is selected, the report will display and may be printed using the web browser's Print options.

Exercise

Steps		
1	Select **My Reports** from the **Related Items** pane.	
2	Select **Time Detail** from the **Available Reports**. For this exercise, select **Time Detail.**	
3	Select **Previous Pay Period** from the **Time Period** drop-down list.	
4	Click **View Report**. The report will display. You may print the report using the browser's **File>Print** options.	
5	Close the **My Reports** tab.	

NOTE: The **Primary Account** button may be used to view a history of labor level changes.



Using My Extended Leave Requests

Employees can submit a request for extended leave for FMLA (Family and Medical Leave Act) or Military Leave using eSTART. Employees who are already on leave of absence can request additional time against an existing leave case using the same workspace. Requests for new leave cases and additional leave time are forwarded to your Agency's Leave Administrator.

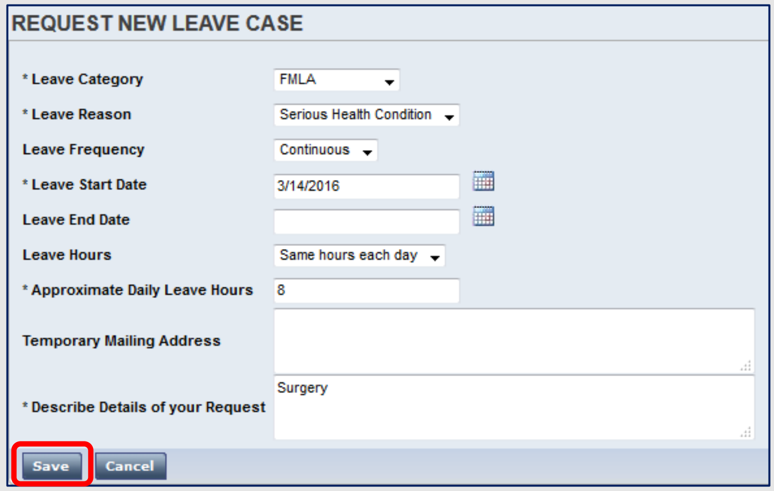
Exercise

You have upcoming surgery and need to request FMLA leave from work. Submit a continuous leave request for FMLA time.

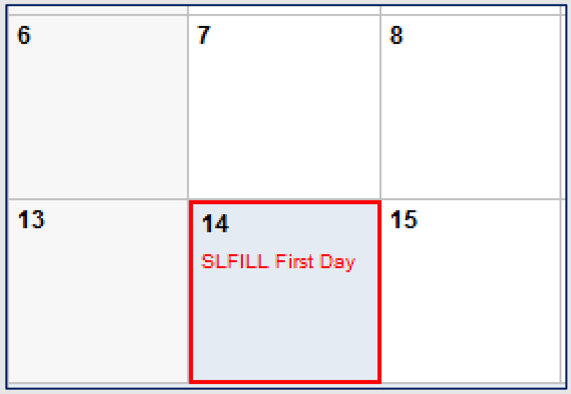
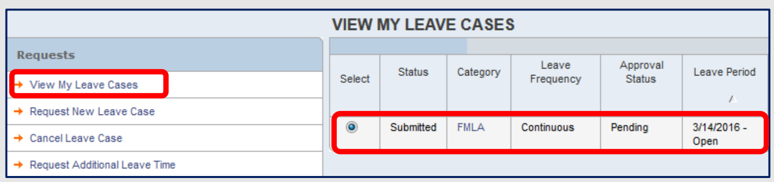
Steps		
1	Select **My Extended Leave Requests** from the **Related Items** pane.	
2	In the **My Leave Requests** calendar, click **Request New Leave Case** from the **Requests** list.	

Steps

3	From the **Leave Category** drop-down list, select the type of leave: Choose **FMLA**.
4	From the **Leave Reason** drop-down list, select **Serious Health Condition.**
5	From the **Leave Frequency** drop-down list, select **Continuous.**
6	From the **Leave Start Date** drop-down calendar, select **1st Monday of the following month.**
7	From the **Leave End Date** drop-down calendar, select the date when you expect the leave to end. **NOTE:** You can leave this field blank if the end date is unknown. For this exercise, leave the field **blank**.
8	Leave **Same hours each day** selected in the **Leave Hours** field.
9	In the **Approximate Daily Leave Hours** field, enter the number of hours you expect to take each day. For this exercise, key **8.**
10	The **Temporary Mailing Address** is an optional field that can be used to inform of the address of the relative you are assisting or the rehab center where you will be staying, etc.
11	Enter an explanation of the leave request in the **Describe Details of Your Request** field. Key **Surgery.**
12	Click **Save**. A message displays: **Notification has been sent to leave administrator**.

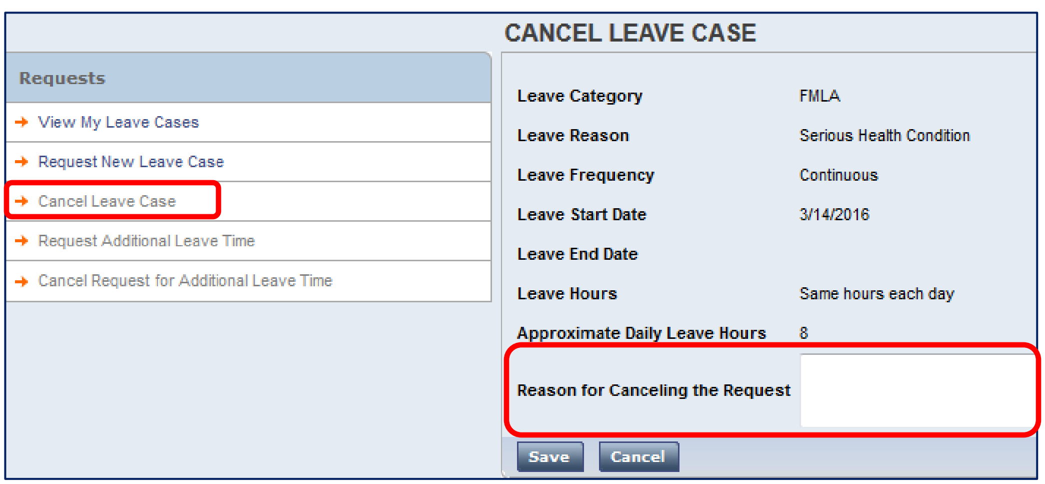


NOTE: (*) Asterisk - Denotes a required field

Steps		
13	Choose **Next Month** from the **Time Period** drop-down. Click **Apply.**	
14	The Leave Request displays as an entry in the **My Leave Requests** calendar.	
15	To review your leave requests, select **View My Leave Cases** from the **Requests** list.	

NOTE

You may cancel a leave case request from the same **My Extended Leave Requests** calendar as well. Select a leave case and click **Cancel Leave Case** in the **Requests** list. Enter a reason for cancelling the request and click **Save**.



NOTES: