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| 14 | Lesson One: Time Management Overview | **Slide Text:**  **At the end of this lesson, you will be able to:**   * Explainthe flow of timesheet information - entry to payment * Identify CDOT's time and leave management policies * Describe the Time Management responsibilities for the following Supervisors, Timekeepers  and Employees * List SAP Transactions fundamental to the approval of time and leave * Identify critical elements of the SAP Timesheet   **Slide Graphic:** | Now, let’s get started.  As we discussed earlier, the Time Management Overview lesson will provide you with a high level view of the Time Management Process. The concepts covered in this lesson should help you to understand the process and just where you fit into it.  It will also take a look at the SAP tools that are fundamental to time and leave approval. |
| 15 | Why It Matters! | **Slide Text:**  It means your employees are ...   * Paid accurately * Paid on time   **Slide Graphic:** | Approving time and leave may be one of the most important supervisory activities you have. The simple act of approving or not approving timesheets directly affects whether employees receive their pay.  Ensuring that employees are paid on time and accurately demonstrates our commitment to our employees and our fundamental CDOT values. |
| 16 | Data Uses | **Slide Text:**  The timeeheet data that is approved by supervisor is then used for:   * Employee pay * FHWA reimbursement * MLOS labor planning * Audit compliance   **Slide Graphic:** | Timesheet entries affect more than your employees’ pay. Data from approved timesheets relates directly to your department’s reimbursement funding and planned labor days.  It is important to understand the impact of this data. It can be far reaching. This information can be used in Department of Labor allegations or hearings with the personnel board. It also may be relevant in terminations for leave abuse or leave exhaustion. Plus, this information may be reviewed in internal audits for the correct use of state funds. |
| 17 | Required Knowledge | **Slide Text:**  CDOT Laws and Rules   * Fair Labor Standards Act * Personnel Board Rules and Personnel Directives Administrative Procedures * CDOT policies and procedural directives * Appointing Authority Delegation Memo * Family Medical Leave Act | Most of the information you need to successfully manage your employees’ time and leave is found outside of the SAP system. A Supervisor needs to have a clear understanding of the Federal, State, Personnel, and CDOT policies and procedures.  Here is a list of the laws and rules you need to understand in order to administer your employees’ time and leave. If you understand these laws and rules, then the actual management of your employees’ time in SAP will take you minutes.  For further information on these topics, click on the links provided or go to CDOT’s internal website. |
| 18 | SAP Transactions | **Slide Text (Rollover):**  CAPP – Review and approve time entries and leave requests  CADO – Query and report on time and leave entries. Supervisors can use this report to manage time. This report identifies time entry status (in process, approved, rejected).  ZCAT3 – Display a single timesheet. Used by maintenance to physically see timesheets for work orders and work center. Can only be viewed ONE employee at a time.  MSS Reports – Multiple reports used to review and manage leave and work schedules. | CDOT’s primary Time Approval transaction is C A P P, more commonly known as CAPP.  Other SAP transactions are used to extract reports or research employees’ time and leave information.  Roll your cursor over each of the transactions to see how you can use them. |
| 19 | Who Can Help? | **Slide Text:**  Remember – the following resources are here to help you:   * Coworkers * Intranet documents * Employees in the Payroll Office * SAP Power User Community * Employees in the HR Office | You are not expected to be an expert when you finish this course. Nor are you expected to memorize everything there is to know about the laws and regulations governing time and leave.  You are not alone, when you come across uncommon situations be sure you reach out to the resources that are available to you. |
| 20 | Time Entry to Pay Process |  | Now, let’s look at how time entry works at CDOT. When the process works as it is designed, employees enter their time or leave in CAT2.  When they release and save their time, SAP checks CAT2 for errors, such as a missing cost center or an employee’s ineligibility to earn overtime.  The supervisor then reviews the entries, to ensure they are correct. If everything is correct, the supervisor approves the time and leave entries.  It is important to note, SAP does not “catch” all entry errors. That is why the supervisor review is so important. You must review the entries carefully. Be particularly aware of the data that SAP **does not** check – this includes such data as hours worked or cost receivers used. We will talk more about this later in the course.  Once the time is approved, it is transferred to SAP HR and the leave banks are adjusted. SAP processes payroll and the employee is paid. Finally, SAP posts the charges to appropriate general ledger accounts.  Throughout this process, the Timekeeper acts as a resource for the Employee and the Supervisor. His or her role is to identify and assist in the resolution of any time and leave entry or approval problems that may arise. |
| 21 |  |  | Everyone in the time entry to pay process needs to work together to ensure that an employee receives his or her pay in a timely manner. Let’s look further at each person’s role and responsibilities. |
| 22 | Employee Responsibilities | **Slide Text:**  Employees   * Adhere to personnel rules, laws and executive orders * Enter time and leave * Report for work on time and work their schedule * Communicate with the supervisor   **Slide Graphic:** | When it comes to time, what is an employee responsible for?  First, employees must adhere to all personnel rules, laws, and executive orders governing their employment.  Employees are also responsible for entering their time and leave in CAT2 and ensuring that all of their entries are timely and accurate. This means paying attention to what they enter in the attendance and absence types, hours worked or on leave, and cost receivers.  When it comes to their physical work times, an employee should ensure that they show up to work on time and work their assigned schedule.  And lastly, employees should ensure they communicate with their supervisor regarding their leave and work time. This is especially important if there is anything out of the ordinary. |
| 23 | Supervisor Responsibilities | **Slide Text:**  Supervisors:   * Apply State and Federal time and leave rules and laws * Balance overtime hours and budget * Request work schedule changes * Review employees’ hours and cost elements * Approve time entries by payroll deadline   **Slide Graphic:** | Next let’s talk about what you, as a supervisor, are responsible for.  First, you must ensure that you adhere to all State and Federal time and leave rules and laws. Also be sure when you review the timesheet cost elements that you identify their impact on organization and project budgets.  When you are actually reviewing the data in SAP, you have three primary responsibilities.  One, if an employee’s work schedule has changed or is incorrect, it is up to you to request that the work schedule be changed in the system.  Two, you are expected to review that the employees entered their hours and cost elements correctly.  And three, you need to be sure that the time entries for your direct reports, as well as any delegated reports, are approved in a timely fashion. |
| 24 | Timekeeper Responsibility | **Slide Text:**  Timekeepers   * Enter leave without pay or absences when an employee is unavailable * Verify employee enters and releases time * Verify supervisors approve time entries prior to Payroll deadline * Perform quality control on time entries * Correct time entry errors * Act as payroll liaison   **Slide graphic:** | Another player in the time entry process is the Timekeeper. Although not directly responsible for the time entry to pay process, Timekeepers are there to help you as you make sure your employees’ time is entered, reviewed and approved on time.  The HR and Payroll Offices have provided guidelines as to the tasks that Timekeepers should perform. It is up to you to let your Timekeeper know what you expect him or her to do and when you expect him or her to do it.  Common Timekeeper tasks include, entering leave without pay or absences when an employees are unavailable to enter their own time, verifying that employees have released their timesheets for approval and verifying that supervisors have approved these entries by Payroll deadlines.  They also may perform time entry quality control to ensure that employees are paid correctly, review time entries to correct problems and act as a payroll liaison. |
| 25 | Appointing Authority Responsibilities | **Slide Text:**  Appointing Authority:   * Notified when time entries have not been approved * Approves leave entries for administrative and leave without pay   **Slide Graphic** | And one last significant participant in the time entry to pay process is the Appointing Authority. Although he or she is not directly involved in the standard time and leave entry process, he or she does have an important role to play.  When it comes to time and leave entry approvals, if these have not been completed in a timely manner, payroll notifies the Appointing Authority. He or she becomes involved in identifying problems and working to ensure that the process is working for the team members.  Also, when dealing with leave requests, the Appointing Authority is responsible for approving leave requests when the requests is for administrative leave or leave without pay. |
| 26 | CAPP | **Slide Graphic** | Now that we’ve looked at the people that are involved in the time entry process, let’s take a brief look at the transaction that you’ll use to approve or reject time and leave entries in SAP.  This is not a detailed discussion of how you approve or reject time entries. That comes later in the course. Instead, it is intended to provide you with an introduction to the SAP tool you will use to review your employees’ time and leave entries. |
| 27 | Time Approval Icons | **Slide Text: (Rollovers)**  Approve – Approves selected time entry(ies). Email sent to employee for leaves ONLY.  Reject – Rejects selected time entry(ies). Email sent to employee.  Select All – Selects all entries in the report. ONLY use this icon when you have finished reviewing all hours and cost elements.  Sort Ascending/Descending Order – Sorts the data in a selected column. For example, if you are looking for a particular A/A type, you can select the column and click this icon.  Display Sum/Sumtotal… - Totals or sumtotals a selected column. For example, if you want to know the hours worked in total and per employee, you can select the hours column and click this icon. If a column is a sum column the sum symbol displays in the column header.  **Slide Graphic:** | First, let’s look at common icons that you will use when reviewing your employees’ time entries. Roll your cursor over the graphic to identify them and how they are used.  Of course, you’ll want to pay particular attention to the **Approve** and **Reject** icons. As well, we’ll highlight some additional icons that will help to make it easier to review your employees’ time. |
| 28 | Variants | **Slide Graphic** | A particularly useful tool in SAP is the variant. Variants can save you time. One variant type, the layout variant, allows you to change the way the data is displayed in CAPP. If the CAPP standard view does not meet your needs then create and save your own layout variant.  For example, if you only approve maintenance timesheets, then you don’t need to see the WBS element. You can remove this from your display and save the new view as a layout variant. You'll have a change to practice creating and saving a variant, but first take a moment to become familiar with the simulation navigation tools. |
| 29 | Navigation Slide | Standard Navigation Slide |  |
| 30 | Exercise | Create and Save Display Variant – uPerform Simulation |  |
| 31 | Key Review Factors | **Slide Text:**  What should you look for:   * Time/Leave Approval Status * Employee Hours * Cost Receiver | Now let’s take a look at the actual time and leave report and the information you need to review. We will focus on the status of the time entry, the hours the employee worked and the cost receiver, which is the location that the employee is paid from. |
| 32 | Exception field | **Slide Graphic:** | The Exception field is probably the first field you’ll look at when you review your employees’ time entries. It identifies the status of the time entry.  This field comes with four possible displays – Yellow – perhaps the most significant to you – means unapproved time, green means approved time, and red means rejected time. The fourth display, grey, indicates the time entry has been changed after it has been approved. |
| 33 | **Employee Types** | **Slide Text:**  Three basic employee types:   * CDOT or Administrative * Engineering * Maintenance   The Data Entry Profile in CAT2 or ZCAT3 defines the data fields and entry structure for each of the employee types.  **Slide Text (Click on Text):**  The data entry profile determines the method of data entry, the layout of the data entry screen, and which data can be maintained. Employees are assigned the Data Entry Profile as appropriate for their employee type. | When you are approving time, it is important you know that not all timesheets are created equal. The data required in the timesheet is driven by the employee’s “type”. CDOT defines three different employee types - CDOT or Admininstrative, Engineering, and Maintenance.  Each employee type requires certain data fields be completed. There are some data fields which are universally required and others which are **only** required for a specific employee type.  Generally the different data fields for employee type center around the cost receiver for the time or leave entry. We will discuss these in greater detail as we move through the lesson.  Just a note - the Data Entry Profile was discussed in theTime Entry class. The Profile the employee is assigned determines which data fields are available for time entry. Click on *Data Entry Profile* for more information. |
| 34 | Key Timesheet Fields | **Slide Text:**  Fields displayed may differ according to employee type.   * Personnel number * Date hours * Start and Stop * Receiver Cost Center * Receiver Funds * Attendance/absence type * Wage Type * Receiving order   **Slide Text (Popup)**  Personnel number – Unique number used to identify an employee.  Date hours – Hours worked on a calendar day.  Start and Stop – Start and stop time for the work. Significant when calculating shift differential.  Attendance/Absence type – Describes the reason for the attendance or absence. Absence types describe an employee’s leave in more detail whereas attendance types are primarily used to document employees' work.  Receiver Cost Center – Cost center to which time entry costs are charged.  Receiver Functional Area – Functional Area to which time entry costs are charged.  WBS – Work Breakdown Schedule. Identifies project to which time entry costs are charged.  Wage Type – Code used to capture on call or shift differential costs  Receiving Order – Work order used to receive the cost of the time. Links the time entry and the MLOS budget. | To start with, let’s look at all of the significant fields when you are doing time and leave approval. We’ll look at all of the fields and then discuss, in more detail, those fields that are employee type specific. One thing to always remember, if you aren’t sure about what is displayed in the fields, be sure to ask someone for help.  Click on each field for further information. |
| 35 |  | **Slide Text (Rollovers):**  Personnel Number – Unique employee identifier  Hours – Total Hours for time entry  Start Time – Starting clock time for time entry  End Time – Ending clock time for time entry  **Slide Graphic:** | Just a note, before you go to approve an employee’s time and leave, it is a good idea to know your employee’s type and work schedule.  Let’s start with the key elements that a supervisor must validate when approving time and leave regardless of the employee type.  First, always ensure you have selected and are reviewing the time for the correct employee.  Next, review the hours worked for the selected time period. **Every employee** must enter their hours worked.  Next, take a look and the Start Time/End Time. Most A/A types require the start and end time for the hours to be entered. This is especially important if an employee is eligible for shift differential payments.  Just an informational note - SAP automatically calculates the hours according to the entries in the Start/End time. In fact, if the hours entered are different from the Start/End Time, the Start/End Time calculation overrides the hours entered. |
| 36 | A/A Type | **Script Text: Marie, this should be slide content**  Click on Attendance/Absence Type to access the A/A type list and explanations.  **Slide Graphic:** | Another important field for you to review is the attendance or absence type. This SAP code identifies whether the entry is for time or leave. For example, 011N is a common code for regular worked hours, whereas 014N is a common code for overtime.  It is very important that your employees enter the correct code. Incorrect A/A code entries can result in errors in employee pay and leave accruals.  If you are unsure of the code, CAPP always displays the Attendance/Absence text. This describes the A/A type and can help with validation.  To view and/or download a list of theA/A Types, the employee type that uses them, and how they are defined click on the Attendance/Absence Type link. |
| 37 | Administrative or CDOT Time | **Slide Graphic:** | Now let’s look at the data fields for each employee type and how they may differ. As previously stated, the differences center around the identified cost receivers.  For an administrative position, the cost receiver generally includes the home cost center and the Receiving Functional Area (RFA). Time entries still need to include the correct Attendance or Absence type. Remember, both attendances and leave requests are entered as an A/A Types.  When entered against a cost center, the work and leave hours are paid from the cost center’s budget. |
| 38 | Engineering | **Slide Graphic:** | Employees who work on engineering projects will charge their time against the CE pool, projects, and home cost centers. If incorrect combinations are entered, SAP identifies these and displays error messages.  Along with the hours worked, a CE Pool entry requires a cost center, a WBS element, and a Receiving Functional Area. Projects, including the Bridge Enterprise, require the a WBS element and a Receiving Functional Area. Once again, the correct A/A type needs to be entered as well.  Typically, for Engineering, A/A types such as leave and administrative work are funded from a Cost Center. |
| 39 | Maintenance |  | The majority of maintenance employees record time against a corresponding work order. The connection between the timesheet and the work order provides the MLOS budget with real time data.  A work order time entry includes the work order number, an activity number, and a work center number. As with all employee types, the A/A type needs to be entered correctly.  An exception to the required A/A type is on call entries. On call entries require a Cost Center and RFA, butan A/A entry is not required. All on call entries are charged to the Wage Type 4099. |
| 40 | Approval |  | CAPP can also provide you with information as to when time entries were changed and by whom. In other words, it indicates who entered the information and the date that they did it.  As well, CAPP can display who approved the time entry and the date they approved it. Don’t forget when you approve a time entry or leave request, SAP automatically adds your name and the date to the entry. |
| 41 | Knowledge Check | **Slide Graphic:** | Here’s an opportunity for you to review what you have learned. Complete the following questions to check your knowledge. Feel free to go back in the lesson and review any topics you are not comfortable with. |
| 42 | Questions | Who is responsible for making sure a CDOT employee is paid on time?  Employee  Supervisor  Timekeeper  Appointing Authority  **All of the above** |  |
| 43 | Questions | What are the key timesheet elements a supervisor has to evaluate in CAPP before approving a time entry?  Leave balance  **Hours**  Work schedule  **Name**  **Cost receivers**  **A/A Type** |  |
| 44 | Questions | Match the responsibilities with the identified roles.  Supervisor   * Balances overtime hours and budget * Applies State and Federal time and leave rules and laws   Timekeeper   * Performs quality control for the time and leave entry process   Employee   * Communicates with supervisor regarding work and leave time * Be present during work schedule |  |