E-Time Reporting Guide for Supervisors

SUNY RF

CONTENTS   Click on topic below to go directly to that page.

E-Time Reporting Guide for Supervisors

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LOG INTO THE ORACLE BUSINESS SYSTEM

How to Access, Log In and Navigate

You can access Self Service from anywhere you have Internet access. You will need your username and password. If you are a first-time user, you will need to set up an account.

1. Go to [Employee Self Service](#)

2. Click **Access Employee Self Service**

3. Enter your Research Foundation ID Number as your username. If you are an RF employee this was sent to you via email when you were first hired. IF you are not contact your campus information security administrator for this number.

4. Enter your password.

   Tip! If you have forgotten your password, click "Forgot Your Password" on the login screen. Your information will be emailed to you.

5. Enter your OneLogin Protect Code. *To set this up, please see the [MFA Quick Start Guide](#).*

6. Go to the Business Applications portlet and click **Self Service** link.

Site Availability

The Self Service website undergoes daily planned system maintenance, from 6:00 to 6:30 p.m. and 2:00 to 4:00 a.m. EST. If you attempt to log in during these times, you will encounter a message that reads, "Employee Self Service Unavailable."

Log Out to Protect Your Personal Information!

When you've completed your session, click **Logout** in the list of links in the upper right corner of the screen. This will help prevent unauthorized access to your information.
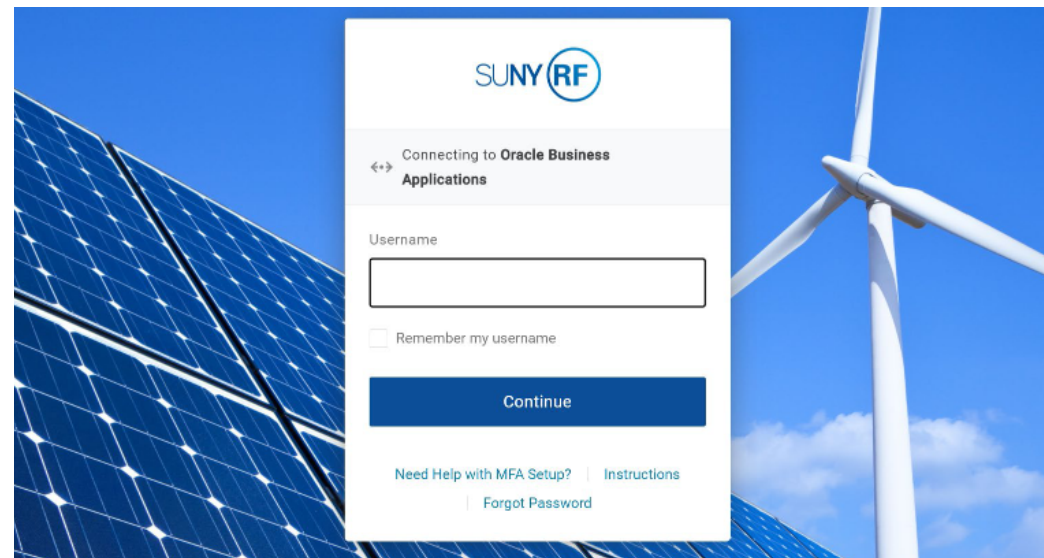
If you need help with Self Service, contact Customer Services at: customerservices@rfsuny.org or (518) 434-7222.

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ACCESS TIMECARD FOR RESPONSE

How to access the response screen

Via Email: You will receive an email notification when your approval is required. The email will be from "Workflow Notification". The email contains a summary of the timecard you are being asked to approve

Click on the **Please click here to Respond** link in the email to approve or reject the timecard.

> *Tip!*
> - *This will bring up the timecard that you would also find in the worklist (see below)*
> - *If you are not already signed into the system you will be prompted to do so when you click on the link*
>   .

By Logging into the Oracle business system directly :

At any time you can log into the Oracle business system and view your worklist, which is located on the right hand side of your Main Menu. The worklist will list all current timecards awaiting your response.

Click on the **link** for the transaction in the subject column to approve or reject the timecard.

From   Smith, John
To   Johnson, Susan
Sent   30-Dec-2015 15:26:17
Due   01-Jan-2016 15:26:17
ID   7679368

Timecard Dates 21-FEB-2015 to 0(
Description   84 total hours (0
OTL Approval ID 12620#292

Timecard Entries
Comments

Hours Type	Absence Reason	Time	Sat, Feb 21	Sun, Feb 22	Mon, Feb 23	Tue, Feb 24	Wed, Feb 25	Thu, Feb 26	Fri,
Worked Hours		Start			08:00AM	08:00AM	08:00AM	08:00AM	08:0
		Stop			12:00PM	12:00PM	12:00PM	12:00PM	12:0
		Hrs							
Worked Hours		Start			12:30PM	12:30PM	12:30PM	12:30PM	12:3
		Stop			05:00PM	05:00PM	05:00PM	05:00PM	05:0
		Hrs							
			0	0	8.5	8.5	8.5	8.5	

Time Detail

Hours Type		Sat, Feb 21	Sun, Feb 22	Mon, Feb 23	Tue, Feb 24	Wed, Feb 25	Thu, Feb 26	Fri, Feb 27
Straight Time Pay	Hrs			4.5	4	4	4	3.5
Straight Time Pay	Hrs			4	4.5	4.5	4.5	
Projected ST OT Pay RF	Hrs							2
Projected ST OT Pay RF	Hrs							0.5
Projected Overtime Pay	Hrs							2.5
		0	0	8.5	8.5	8.5	8.5	8

Action History

Num	Action Date	Action	From
1	30-Dec-2015 15:26:17	Submit	Smith, John

Please click here to Respon

Worklist

Full List (2)

From	Type	Subject	Sent ▼	Due
Smith, John	OTL Workflows for Employee	Timecard (21-FEB-2015 to 06-MAR-2015) for Smith, John (84 hours) requires approval	30-Dec-2015	01-Jan-2016
Smith, John	OTL Workflows for Employee	Timecard (07-FEB-2015 to 20-FEB-2015) for Smith, John (75 hours) requires approval	30-Dec-2015	01-Jan-2016

✓ TIP Vacation Rules - Redirect or auto-respond to notifications.
✓ TIP Worklist Access - Specify which users can view and act upon your notifications.

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RESPOND TO A TIMECARD

The Response Screen

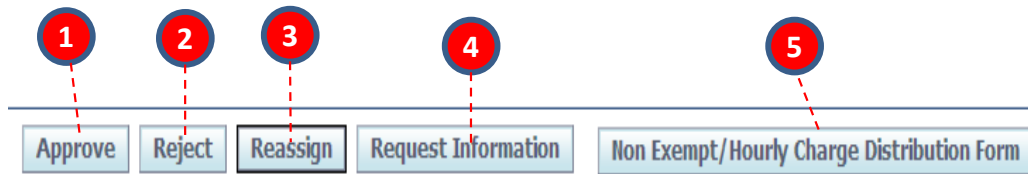**To Respond to the Timecard:**

1. Click the **Approve** button to submit the timecard to HR for processing
2. Click the **Reject** button to return the timecard to the employee for correction
3. Click the **Reassign** button to give another person authority to approve the transaction (see pg. 3.2)
4. Click the **Request Information** button to send a question to another user. (see pg. 3.3)

Other items on the Response Screen:

5. Click the **Non Exempt/Hourly Charge Distribution Form** button to review and assign the hours worked to a project/task/award (see pg. 4.1)
6. Click in the **Response** section and add a note to subsequent approvers, as necessary. Enter a note prior to responding to the transaction.
7. Click the **Return to Worklist** link to leave this transaction and take no action

Tip!

- *Sick and Non-Worked Hours Types require employees to enter a reason. See pg. 7.1 for a list of Absence Reasons and when they should be used.*
- *The Action History includes the details of all prior Approvals, Return for Correction, Request for Information and corresponding Notes*
- *If the information on the timecard is correct you should approve the timecard as soon as possible, even if you are waiting for additional documentation (i.e. Jury Duty documentation)*

RESPOND TO A TIMECARD

How to Reassign approval authority for the timecard to another user

To Reassign the transaction to another user:

1. Select the person who the transaction should be forwarded to

   Tip!

   - *"Delegate your response" and "Transfer notification ownership" will both delegate your authority to approve this transaction to the user selected*

   - *The List of Values for "All Employees and Users" include employees from all campus sites. Please ensure you are selecting the correct person from your campus location.*

2. Enter a **Note** in the **Comment** section indicating why the transaction is being is being forwarded to them for approval.

3. Click **Submit**

Oracle Applications Home Page >   Notification Details >

Reassign Notification: Timecard (01-JAN-2016 to 31-JAN-2016) for Jones, Sarine (3) requires approval

Use 'Delegate' to give another user authority to respond to a notification on your behalf, while still retaining ownership or 'Transfer' to give another user complete ownership of and responsibility for that notification.

[Cancel] [Submit]

* Indicates required field

* Assignee [All Employees and Users ▼] [▾] 🔍   **(1)**

   ◉ Delegate your response
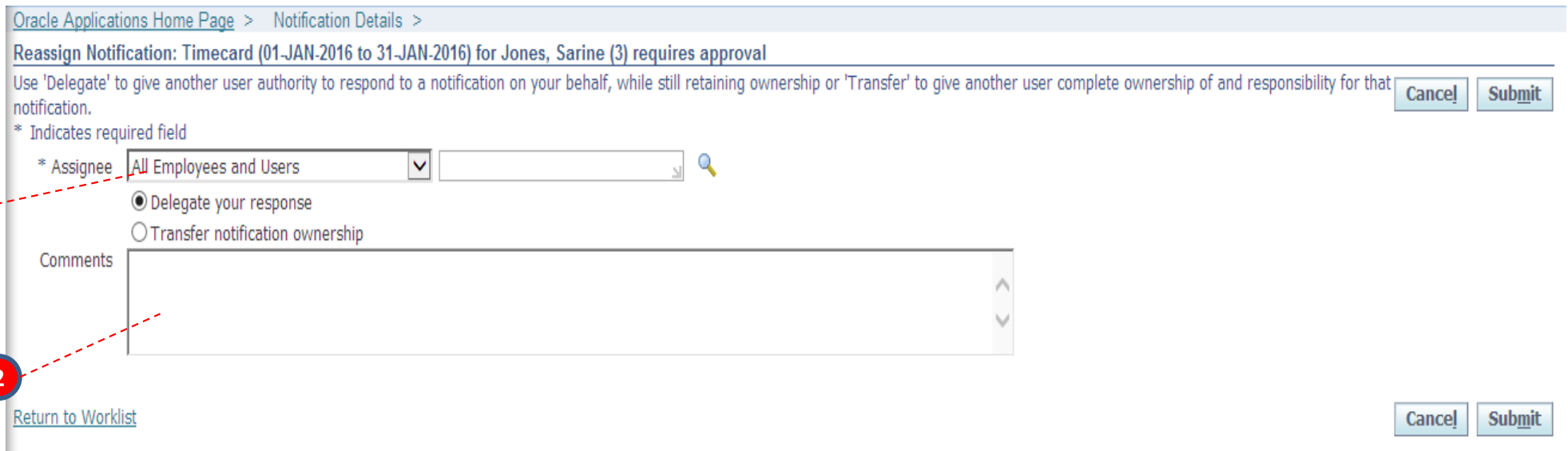   ○ Transfer notification ownership

Comments [   ] **(2)**

Return to Worklist   [Cancel] [Submit]

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RESPOND TO A TIMECARD

How to Request Information for the timecard from another user

To Request Information from another user:

1. Select the person who you are asking about the timecard

    Tip!

    - *"Workflow Participant" will be the employee, if you are requesting information from a different person select "Any User"*

    - *The List of Values for "All Employees and Users" include employees from all campus sites. Please ensure you are selecting the correct person from your campus location.*

2. Enter a **Note** in the **Information Requested** section.

3. Click **Submit**

Oracle Applications Home Page > Notification Details >

Request Information: Timecard (01-JAN-2016 to 31-JAN-2016) for Jones, Sarine (3) requires approval

* Indicates required field

[Cancel] [Submit]

More Information Request

Request More Information From ⦿ Workflow Participant   [Jones, Sarine ▾]

○ Any User   [All Employees and Users ▾]   [_____] 🔍

* Information Requested [_____]

Return to Worklist   [Cancel] [Submit]

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DISTRIBUTE HOURS WORKED

How to allocate hours worked to a Project/Task/Award

If a non-exempt salaried person has worked more hours than required by their FTE or if the employee is hourly, these hours need to be distributed to an active project/task/award. The hours will <u>automatically</u> distribute against the project/task/awards in the labor schedule using the percentage assigned. For example, if the person had 5 hours and a labor schedule that has 50% on one project/task/award string and 50% on the other, the hours will automatically distribute 2.5 to each. If the hours should be distributed differently, follow the steps below.

Click Non-exempt/Hourly Charges Distribution Form

1. Change the hours in both the Straight Time Hours and OT Hours columns to reflect where the employee spent their effort.

*Tip! The amount of hours that must be distributed are listed on the bottom of the form. **All** hours worked (including those considered overtime) for hourly employees and those over the FTE for non-exempt salaried employees will be in Straight Time Hours. If the employee also has worked enough hours to have overtime hours for the period, those overtime hours will also be in the OT Hours column.*

2. Once the hours are distributed appropriately click the **Approve Distributions** button

Tip!

▪ *If a project/task/award string is not in the labor schedule but hours should be distributed to that string, adjust the hours that apply to the existing strings and approve. You will receive a message that tells you the undistributed hours will go to suspense. Click Continue and back on the main approval form, use the Notes field in the Response section and indicate where the hours should be distributed.*

▪ *This screen will only be visible at the time of approval. Once the timecard is approved contact your HR office for this information.*

Labor Distributions Review

Only hours above a non-exempt salaried employees FTE can be distributed here.

If the distribution of effort needs to change for their normal work hours please contact your Sponsored Program or HR office

Timecard (21-FEB-2015 to 06-MAR-2015) for Smith, John (84 hours) requires approval

Project	Task	Award	Award Name	Exp Date	Organization	Expenditure Type	% of Effort	Straight Time Hours	OT Hours
1121541	1	69853	131	06-MAR-2015	020 Accounts Payable	SWR Regular Nonexer	25	2.25	1
1123148	1	70694	TOA- 313 File 3072.01	06-MAR-2015	020 Accounts Payable	SWR Regular Nonexer	25	2.25	1

Approve Distributions

	Total Straight	Total Overtime

There are 9 straight hours and 4 overtime hours reported on timecard. You cannot distribute more than the total number of reported hours.   9   4

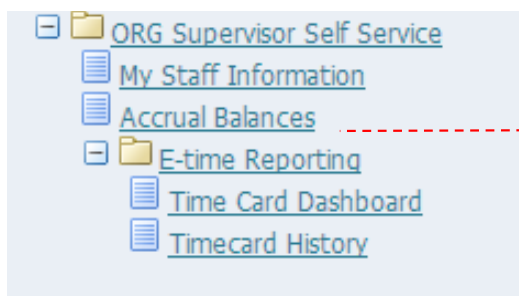* totals should agree with hours reported on timecard

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MONITORING

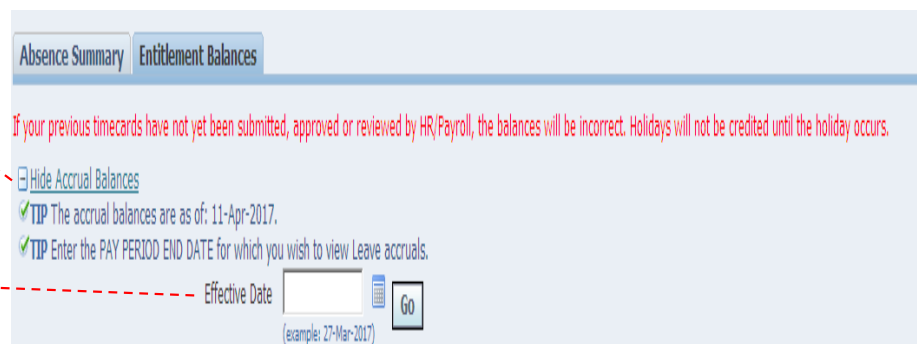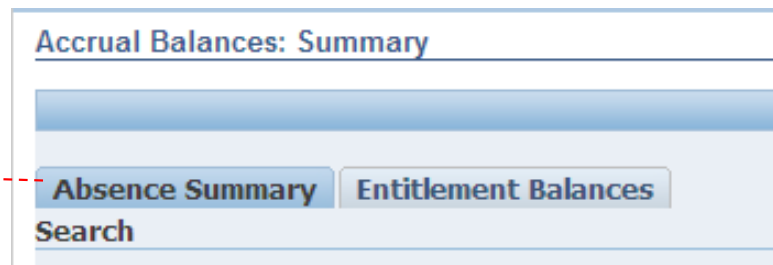## Viewing Employees' Accrual Balances

When you want to review an employee's accrual balances, take the following steps:

1. Using ORG Supervisor Self Service responsibility click Accrual Balances

2. Locate the employee you want to review and click Balance action button on far right for that employee (if you would like to see employees that report to your staff click the plus next to their name)

3. The next screen has two tabs; the Absence Summary lists the absences for the employee

4. The Entitlement Balances tab will show the employees accrual balance as of the date you select. Open the show balances screen by clicking the plus symbol

5. Change Effective Date and click Go to see results for a different period

Note: accrual balances only reflect the usages through the last timecard that has been submitted, approved, and fully processed into the E-Time module. Please deduct leave taken for absences that are not reflected on the absence summary tab.

Name	Balance
⊟ Smith, Susan	
⊞ Johnson, Lynda	
Jones, Michele	
Miller, Matthew	

Accrual Balances: Summary

Absence Summary | **Entitlement Balances**
Search

Absence Summary | Entitlement Balances

If your previous timecards have not yet been submitted, approved or reviewed by HR/Payroll, the balances will be incorrect. Holidays will not be credited until the holiday occurs.

⊟ Hide Accrual Balances

✔TIP The accrual balances are as of: 11-Apr-2017.

✔TIP Enter the PAY PERIOD END DATE for which you wish to view Leave accruals.

Effective Date [　　　] 📅 Go
(example: 27-Mar-2017)

ORG Supervisor Self Service
- My Staff Information
- Accrual Balances
- ⊟ E-time Reporting
  - Time Card Dashboard
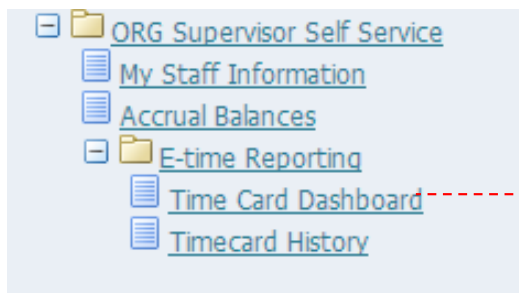 - Timecard History

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MONITORING

Timecard Dashboard

When you want to monitor the status of employees timecards, including those who have not yet submitted for a particular period, use the Timecard Dashboard

1. Using ORG Supervisor Self Service responsibility click Timecard Dashboard under E-time Reporting

2. Enter the start and end dates of the timeframe you would like to review.

3. If you want to see just those employees that report to you select "Directs", if you would like to see those employees that report to you and those that report to others in your staff select "All Employees under Directs and Click Go

4. Each status will have a number listed, these numbers are links that once clicked will display the detail in the bottom portion of the screen

5. For those timecards in a Submitted status, you can approve from the detail section by clicking the Action button on the far right.

End Date 31-Mar-2017
(example: 27-Mar-2017)
* Reporting Employees Directs

Supervisor	Not Entered	Working
Smith, Ms. Susan E	3	1

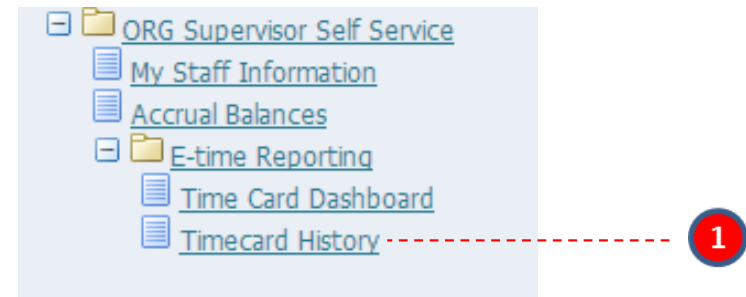| Last Modified Date	Action
11-Apr-2017	

□ 📁 ORG Supervisor Self Service
  📄 My Staff Information
  📄 Accrual Balances
  □ 📁 E-time Reporting
    📄 Time Card Dashboard
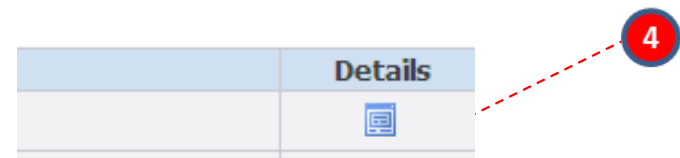   📄 Timecard History

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MONITORING

Timecard History

When you want to review timecards you have approved in the past use the Timecard History menu.

1. Using ORG Supervisor Self Service responsibility click Timecard History under E-time Reporting

2. Enter the start and end dates of the timeframe you would like to review.

3. If you want to see all those employees that report to you select leave the Person field blank, or complete it if you would like to see just one person. Change the Mode to "History" and Click Go

4. To see the detail for any timecard returned, click the Details button on the far right.

ORG Supervisor Self Service
My Staff Information
Accrual Balances
E-time Reporting
Time Card Dashboard
Timecard History — **1**

Search

From Date 01-Jan-2017 — **2**
(example: 27-Mar-2017)

Person — **3**

Mode History

4

Details

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OTHER FEATURES

How to Create Vacation Rules

Use vacation rules to handle your notifications automatically when you are not available to manage your notifications directly, such as when you are on vacation.

1. Click the **Vacation Rules** link

2. Click the **Create Rule** button

3. Select **Item Type** of OTL Workflows for Employees

4. Select **Notification** "All" for rule to apply to all HR Notifications

5. Enter the **Start and End Date** you would like the Rule to expire

6. Select the name of the authorized user that will receive all your notifications to take action on.

7. Click the **Apply** button to save the rule

Worklist

Full List

From	Type	Subject	Sent ▾	Due
	HR	Worker Status Change for Abbott, Janice (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014
	HR	Hire or Placement for Doe, Ms. Jane (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014

✔ TIP Vacation Rules - Redirect or auto-respond to notifications.
✔ TIP Worklist Access - Specify which users can view and act upon your notifications.

Vacation Rules

Create Rule

Rule Name	Item Type	Notification	Update	Delete	Status
You have not setup any notification routing rules. Please use the Create Rule button to create a new notification routing rule.					

Return to Worklist

Vacation Rule: Response

* Indicates required field

Item Type **OTL Workflows for Employees**

Notification **All**

* Start Date 10-Jun-2016 10:13:37

(example: 10-Jun-2016 10:13:37)

End Date

Message

Comments will display with each routed notification

◉ Reassign   All Employees and Users   [dropdown]

◉ Delegate your response
A manager may delegate all notification approvals to an assistant.

○ Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

○ Deliver notifications to me regardless of any general rules

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OTHER FEATURES

How to Grant Worklist Access

The worklist access feature lets you allow another user to handle your notifications. However, note that a user who has access to your worklist can view all the details of your notifications and take most actions that you can take on the notifications. **IMPORTANT!** Ensure that you take all necessary security considerations into account when you choose to grant worklist access to another user.

1. Click the **Worklist Access** link
2. Select the name of the user that you are granting access to.
3. Enter the **Start and End Date** you would like the Rule to expire
4. Click Grant Access to **Selected Item Types** and select "OTL Workflows for Employees"
5. Click the **Apply** button to save the rule

Worklist

			Full List
From	**Type**	**Subject**	**Sent** ▽	**Due**
	HR	Worker Status Change for Abbott, Janice (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014
	HR	Hire or Placement for Doe, Ms. Jane (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014

✓**TIP** Vacation Rules - Redirect or auto-respond to notifications.
✓**TIP** Worklist Access - Specify which users can view and act upon your notifications.

Oracle Applications Home Page > Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist.   Cancel   Apply

* Indicates required field

* Name   All Employees and Users ▼

Description

* Start Date   14-Apr-2014
(example: 14-Apr-2014)

End Date

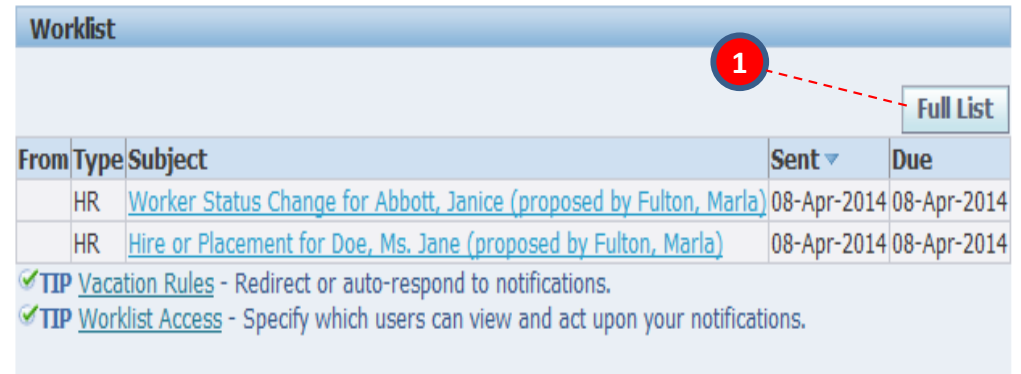Grant Access to   ⦿ All Item Types
⦾ Selected Item Types

Cancel   Apply

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OTHER FEATURES

How to view previous transactions in your worklist

You can review previously approved and informational transactions in your work list.

1. Click on the **Full List** icon
2. Use the arrow in the **View** field to select All Notifications, Notifications From Me or Open Notifications and Click **Go**
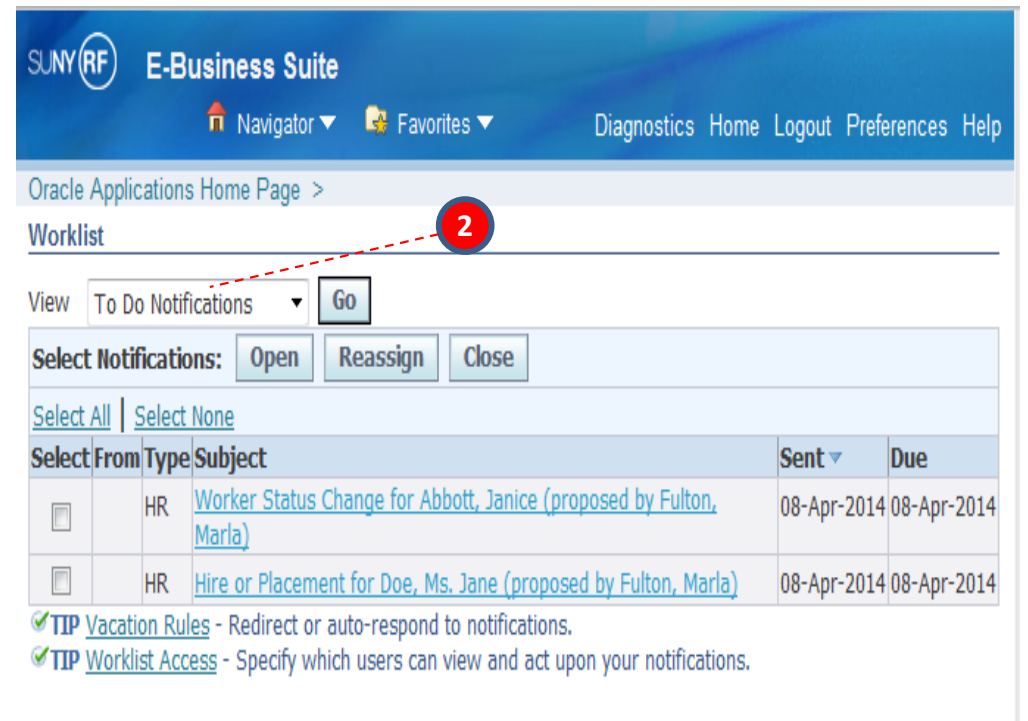
Worklist

From	Type	Subject	Sent ▼	Due
	HR	Worker Status Change for Abbott, Janice (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014
	HR	Hire or Placement for Doe, Ms. Jane (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014

✔**TIP** Vacation Rules - Redirect or auto-respond to notifications.
✔**TIP** Worklist Access - Specify which users can view and act upon your notifications.

SUNY**RF** **E-Business Suite**

🏠 Navigator ▼   ⭐ Favorites ▼   Diagnostics Home Logout Preferences Help

Oracle Applications Home Page >

Worklist

View [To Do Notifications ▼] [Go]

Select Notifications: [Open] [Reassign] [Close]

Select All | Select None

Select	From	Type	Subject	Sent ▼	Due
☐		HR	Worker Status Change for Abbott, Janice (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014
☐		HR	Hire or Placement for Doe, Ms. Jane (proposed by Fulton, Marla)	08-Apr-2014	08-Apr-2014

✔**TIP** Vacation Rules - Redirect or auto-respond to notifications.
✔**TIP** Worklist Access - Specify which users can view and act upon your notifications.

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OTHER FEATURES

Clear Notifications

Notifications

When you respond to a notification by approving a timecard it will be removed from your worklist. However, there may be other informational notifications that you may want to clear. To do this:

1. Click **Full List**
2. Select the notifications you wish to clear
3. Click **Close**

.

Worklist

				Full List (1)	
From	Type	Subject		Sent ▾	Due
Johnson, Susan	OTL Workflows for Employees	Johnson, Susan approved timecard for period 07-FEB-2015 - 20-FEB-2015		31-Dec-2015	

☑ **TIP** Vacation Rules - Redirect or auto-respond to notifications.
☑ **TIP** Worklist Access - Specify which users can view and act upon your notifications.

Select Notifications: | Open | Reassign | Close |

Select All | Select None

Select	From	Type
☐	Johnson, Susan	OTL Workflows for

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APPENDIX A

Absence Reasons

Absence Reason	Used For. . .
Bereavement (Sick)	Death of an immediate family member.
Cancer Screening (Non Work)	Screening for any type of cancer.
COVID Vaccine (Non Work)	COVID-19 vaccine injection.
COVID-19: Employee Illness (Non Work)*	Unable to work due to COVID 19
Employee Illness/Injury (Sick)	Your own illness or injury.
Employee Medical Appointment (Sick)	Medical appointments.
Family Illness/Injury (Sick)	To care for an immediate family member due to illness or injury.
FMLA Approved by HR - Employee Illness/Injury (Non Work)*	An approved unpaid FMLA absence for your own illness or injury.
FMLA Approved by HR - Family Illness/Injury (Non Work)*	An approved unpaid FMLA absence for an immediate family member's illness or injury.
FMLA Employee Illness/Injury (Sick)*	An approved FMLA absence for your own illness or injury.
FMLA Family Illness/Injury (Sick)*	An approved FMLA absence for a family member's illness or injury.
Jury Duty (Non Work)*	When you have a jury duty obligation.
Leave of Absence Unpaid Approved by HR (Non Work)*	An approved unpaid leave of absence approved by HR.
Military (Non Work)*	Approved absence to serve in the military.
Other (provide explanation in comments field) (Non Work)	An absence reason not covered by an existing absence reason code.

Note: Immediate family member is defined an employee's child, spouse, domestic partner, parent, sibling, grandchild or grandparent, the child or parent of an employee's spouse or domestic partner and any person with whom the employee makes their home. A maximum of 25 days of accrued sick PTO per calendar year can be used for family illness/injury and bereavement.

*Requires HR Approval.

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APPENDIX A

Absence Reasons

Absence Reason	Used For. . .
Safe Leave (Sick)	A reason approved under the NYC Safe Leave Act.
Sick – Non Balance/Not Eligible (Non Work)	Sick accruals are exhausted/not available.
Site Closure Approved by HR (Non Work)	An approved site closure.
Vacation – Non Balance/Not Eligible (Non Work)	Vacation accruals are exhausted/not available.
Voting (Non Work)	Voting.

Note: Immediate family member is defined an employee's child, spouse, domestic partner, parent, sibling, grandchild or grandparent, the child or parent of an employee's spouse or domestic partner and any person with whom the employee makes their home. A maximum of 25 days of accrue sick PTO per calendar year can be used for family illness/injury and bereavement.

*Requires HR Approval.

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Where to go with questions

Trouble understanding the forms?
Contact Your Campus HR/Payroll Office

Patty Pritchard: pritchap@newpaltz.edu or (845)257-3008

Trouble logging on to the system?
Contact RF Customer Services:

518-434-7222

CustomerServices@rfsuny.org

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