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## **SmarteHR Time Card Entry**

**User Guide**

Revised 06/01/2018

**TABLE OF CONTENTS**

- Time Card Entry..... 2**
- Time Entry Screen .....2**
  - Selectors Panel..... 2
  - Default Settings for New Time Card Entries Panel..... 6**
  - Time Card Entry Panel..... 8**
- Updating / Entering Time Card Entries .....9**
  - Update Existing Time Card Entries..... 10
  - Entering New Time Card Entries ..... 10
  - Deleting existing Time Card Entries ..... 11
- Time Card Entry Error Messages .....11**
- Pay Period Time Card Entry Approval.....13**
- Pay Period Time Card Printing.....13**

**TIME CARD ENTRY**

The Smartetools on-line Time Card Entry is a web based form that replaces the OVT CRT, SWK CRT and LWK CRT screens previously used in KEA for the reporting of Overtime/Extra Time, and regular and long-term substitutes work time.

**TIME ENTRY SCREEN**

The time card screen consists of three main panels as shown below, they are, ‘Selectors’, ‘Default Settings for New Time Card Entries’, and ‘Time Cards’.

Selectors Panel

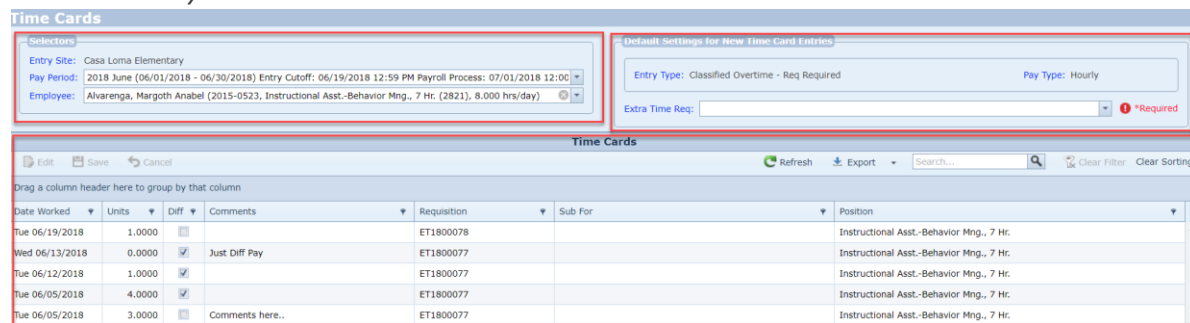
The selectors panel indicates the **Entry Site** , **Pay Period** and **Employee** for which time cards are being entered.

The Entry Site will default to your user profile’s work site which is normally set to the work site associated with your prime job assignment.

The Pay Period dropdown lists all pay periods available for the current fiscal year and will default to the pay period that is currently open for time card entry. Previous pay periods may be selected to display prior entries, however, updates to closed (locked) pay periods will not be permitted.

The Employee dropdown displays employees available for time card entry. For regular site and department timekeepers the employees appearing in the list are normally those working at the Entry Site, as well as, all regular substitutes and long term substitutes working at the site.

*Time Card Entry Screen*



*Pay Period Selection*

The Pay Period dropdown displays existing pay periods for time card entry.

**Start/End Dates** : the dates for which the pay period applies.

**Entry Cutoff Date** : the date and time after which time card entries will no longer be permitted by site and department timekeepers. The entry cutoff date and time can be extended but requires a user with access rights to perform extensions, which is normally the district payroll department.

**Payroll Process Date**: the date Payroll will be processed at the County Office.

**Lock Status**: indicates if time card entries can be entered for the pay period.

Pay Period:	June (06/01/2018 - 06/30/2018) Entry Cutoff: 06/29/2018 2:43 PM Payroll Process: 07/01/2018 12:00 AM					
Employee:	Pay Period	Start Date	End Date	Entry Cutoff Date	Payroll Process Date	Lock Status
	2018 June	06/01/2018	06/30/2018	06/29/2018 2:43 PM	07/01/2018 12:00 AM	
	2018 May	05/01/2018	05/31/2018	05/30/2018 12:00 AM	06/01/2018 12:00 AM	(Locked)
	2018 April	04/01/2018	04/30/2018	04/30/2018 12:00 AM	05/02/2018 12:00 AM	(Locked)

### Employee Selection

Clicking on the Employee or the Sub For Employee dropdown will display an employee search panel. The employees displayed are limited to employee access granted to the user profile, which is normally the entry site and substitute employees. Click on an employee row to select the employee for time card entry.

### Employee and Sub For Employee Filtering and Sorting

The employee search panel provides the following search options for filtering and locating an employee.

- Employee Name Entry.** Entering the employee name into the Employee dropdown will cause the employee list to auto filter based on the name being entered. Since the employee name is formatted as last Name, First Name Middle Name, entering the employee name in this format is needed for proper filtering. See sample below where the last name part 'Alvarad' has been entered and list filtered accordingly.

**Time Cards**

Selectors

Entry Site: Casa Loma Elementary

Pay Period: 2018 June (06/01/2018 - 06/30/2018) Entry Cutoff: 06/19/2018 12:59 PM Payroll Process: 07/01/2018 12:00

Employee: Alvarado Urias, Reyna (2015-0026, Substitute - Elementary Teacher (81190), 7.000 hrs/day)


**Employees**

Drag a column header here to group by that column

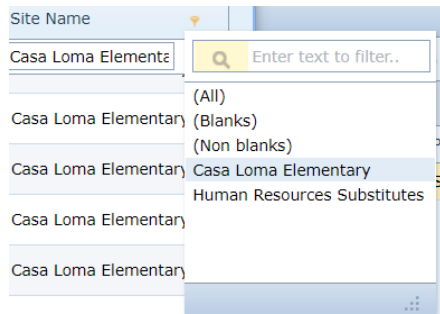
Filter	Employee Number	Employee Name	Job Title	Hours/Day	Site Name
Apply Clear					
Employee Name	2015-0026	Alvarado Urias, Reyna	Substitute - Elementary Teacher (81190)	7.00	Human Resources Substitutes
Abrams Jr, Wilto	2015-0026	Alvarado Urias, Reyna	Substitute - Jr High Teacher (81195)	7.00	Human Resources Substitutes
Alvarado Urias,		Alvarado, Jennifer H	Substitute - Bus Monitor (83090)	8.00	Human Resources Substitutes
Alvarenga, Marg	2013-0061				

- Column Header Filtering.** Two options exist for filtering the column headings, filter value selection and filter value entry.

**a. Filter value selection.**

to select a column data value to filter on select the filter icon  next to header title in the desired column. This will cause a dropdown of all the unique data values for that column to be displayed next to the column. Select the value for filtering The sample below shows the 'Site Name' column being filtered.

**Filter selection**




**Filter Applied**

When a filter has been applied the filter icon color will be yellow and the selected value will show in the filter entry box. te

Employees					
Drag a column header here to group by that column					
Filter	Employee Number	Employee Name	Job Title	Hours/Day	Site Name
Apply Clear					Casa Loma Elementz
			HFS (1190)		
	2005-0011	Stancil, Susan Elaine	School Nutrition Manager (2119)	8.00	Casa Loma Elementary
	2016-0135	Taylor Jr, Frederick Shamrad	Cafeteria Playground Activity Ldr., 6 Hr (3604)	8.00	Casa Loma Elementary

**b. Entering a Filter Value**

A filter may also be applied by entering a value directly into the filter box in any grid data column. The filter icon  next to the filter box provides a number of options, as showned below, to control how the search is performed. By default the filter option is set to 'Begins With'.

**Filter options**

- Begins with
- Contains
- Doesn't contain
- Ends with
- Equals
- Doesn't equal

**Filter Applied Using the 'Contains' option**

Employees					
Drag a column header here to group by that column					
Filter	Employee Number	Employee Name	Job Title	Hours/Day	Site Name
Apply Clear			Monitor		
	2014-0548	Rodriguez, Melodie Maryann	Substitute - Bus Monitor (83090)	8.00	Human Resources Substitutes
	2005-0410	Rollins, Lorraine	Substitute - Bus Monitor (83090)	8.00	Human Resources Substitutes
	2012-0321	Ruiz, Joseph	Substitute - Bus Monitor (83090)	8.00	Human Resources Substitutes


A filter can be applied by hitting ENTER or clicking on the **Apply** button in the 'Filter' column. When a filter has been applied, existing filter(s) can be removed by clicking on the **Clear** button in the 'Filter' column

### Employee List Grouping Sorting and Paging

Search results may be grouped by any of the available data columns by dragging a heading column into the grouping area as shown below.

Employees					
Drag a column header here to group by that column					
Filter	Employee Number	Employee Name	Job Title	Hours/Day	Site Name
Apply					
	1998-0298	Hinh, Holly S	Academic Coach (1158)	8.00	Casa Loma Elementary

### Employee Search Grouped by 'Job Title'

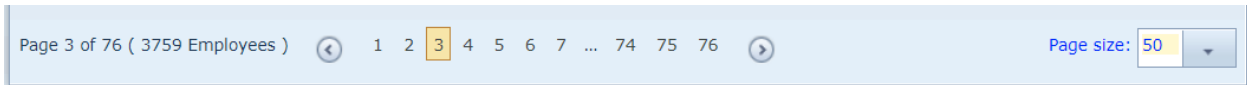
When a column grouping is applied the search results are grouped and displayed by the selected grouping. Clicking on the  next to a grouping title will display the details records for that group. Click on the detail record for employee selection.

Employees					
Job Title					
Filter	Employee Number	Employee Name	Hours/Day	Site Name	
Apply					
<ul style="list-style-type: none"> <li>&gt; Job Title: Academic Coach (1158) (Count=1)</li> <li>&gt; Job Title: Academic Program Leader (1115) (Count=1)</li> <li>▼ Job Title: Aide I, 3 Hr. (2955) (Count=4)</li> <li>&gt; Job Title: Aide II, 6 Hr. (2910) (Count=3)</li> <li>&gt; Job Title: Behavioral Intervention Specialist (2796) (Count=1)</li> <li>&gt; Job Title: Cafeteria Playground Activity Ldr., 6 Hr (3604) (Count=6)</li> <li>&gt; Job Title: Campus Supervisor (2135) (Count=1)</li> </ul>					
	1986-0015	Crowder, Linda	8.00	Casa Loma Elementary	
	1987-0142	Longs, Lisa Marie	8.00	Casa Loma Elementary	
	1986-0124	Mccoey, Dewayne	8.00	Casa Loma Elementary	
	1986-0159	Seal, Belinda	8.00	Casa Loma Elementary	

Page 1 of 2 ( 66 Employees )      Page size: 50

### Employee Search Paging

The bottom of the search panel shows the number of total pages, record count and pager selector. To move between pages click on either the forward/backward arrows or desired page number. The 'Page Size' dropdown can be used to also set the number of records that is displayed per page. The default size is 50 records.



### Default Settings for New Time Card Entries Panel

The default settings for new time card entries section indicates the **Entry Type**, **Pay Type**, and if required, the selection of an **Extra Time Requisition** and/or **Sub For Employee**.

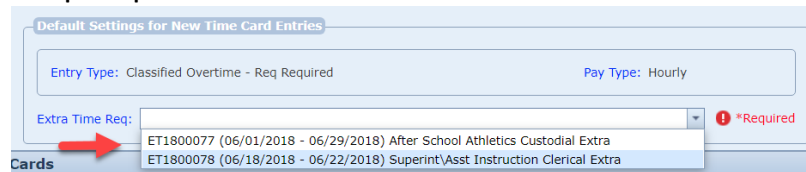
Based on the type of employee selected this section will indicate the Entry Type, Pay type and whether or not an Extra Time Req and/or Sub For Employee is required for a time card. The software is currently configured for the following time card entry types:

- Classified Overtime Req Required
- Classified Overtime No Req Required
- Certificated Extra Time Req Required
- Certificated Extra Time No Req Required
- Classified Substitute
- Certificated ST Sub
- Certificated LT Sub

### Classified Overtime

This entry type is for entering normal Classified Overtime and requires an approved Extra Time Requisition for time entry. The Extra Time Req dropdown list will display the available requisitions, indicating the requisition #, start/end dates of work dates permitted by the requisition, and the Event code indicated on the requisition. If only one requisition is approved it will automatically be selected by default.

### Multiple Reqs Available



### Single Req Default Selection



**Classified Over Time – No Extra Time Req is Required**

This entry type is for entering Classified time without an approved Extra Time Requisition. This entry type can be used when prior requisition approval is not possible or required. To use this entry type the employee’s job assignment under which time is being reported must be specifically approved for ‘No Req Required’ status. This is normally approved and set by your HR department.

Default Settings for New Time Card Entries

Entry Type: Classified Over Time - No Req Required      Pay Type: Hourly

**Certificated Extra Time**

This entry type is for entering Certificated Extra time. Similar to Classified time, it also requires an approved Extra Time Requisition for time entry.

Default Settings for New Time Card Entries

Entry Type: Certificated Extra Time - Req Required      Pay Type: Hourly

Extra Time Req:  ! \*Required

**Certificated Extra Time – No Extra Time Req is Required**

This entry type is for entering Certificated Extra time without an approved Extra Time requisition. Similar to Classified, the employee’s job assignment must be approved for this entry type.

Default Settings for New Time Card Entries

Entry Type: Certificated Extra Time - No Req Required      Pay Type: Hourly

Extra Time Req:

**Regular/Classified Substitute**

This entry type is for reporting Classified Substitute time and requires the selection of a ‘Sub For Employee’ for time entry. The Sub For Employee dropdown provides a list of employees for selection. Time card entries will be associated with the selected ‘Sub For Employee’.

Default Settings for New Time Card Entries

Entry Type: Classified Substitution      Pay Type: Hourly

Extra Time Req:

Sub For Employee:  ! \*

**Certificated Short Term Substitute**



This entry type is for reporting Certificated Substitute time and requires the selection of a 'Sub For Employee' for time entry. The Sub For Employee dropdown provides a list of employees for selection. Time card entries will be associated with the selected 'Sub For Employee'.

The screenshot shows a panel titled "Default Settings for New Time Card Entries". It contains two main sections: "Entry Type" set to "Certificated ST Sub" and "Pay Type" set to "Hourly". Below these are two dropdown menus: "Extra Time Req:" and "Sub For Employee:". The "Sub For Employee:" dropdown has a red exclamation mark icon next to it, indicating a required field or an error.

### Certificated Long Term Substitute

This entry type is for reporting Certificated Long Term Substitute time and requires the selection of a 'Sub For Employee' for time entry. The Sub For Employee dropdown provides a list of employees for selection. Time card entries will be associated with the selected 'Sub For Employee'. Note that Long Term Substitute time is reported in days as opposed to hours.

The screenshot shows a panel titled "Default Settings for New Time Card Entries". It contains two main sections: "Entry Type" set to "Certificated LT Sub" and "Pay Type" set to "Daily". Below these are two dropdown menus: "Extra Time Req:" and "Sub For Employee:". The "Sub For Employee:" dropdown has a red exclamation mark icon next to it, indicating a required field or an error.

### Time Card Entry Panel

The Time Cards section is used to enter time card entries. Entries are entered by work date along with the Units Worked, Diff Pay Indicator, Comments and the selected Requisition and/or Sub For Employee from the 'Default Settings for New Time Card Entries' panel as described above.

**Date Worked** – date of time worked. Dates prior to the start of the pay period work date will be accepted but only up to the maximum number of days prior to the start date set by the district. Please check with you HR Department for the number of days permitted. Dates after the current date and pay period end date are not permitted.

**Units** – number of units to be paid. Hours or Day based on Pay Type

**Diff** – whether or not Differential Pay is to be paid to employee on this date. Diff pay can only be paid if the selected Extra Time Requisition permits Differential Pay.

**Comments** – general comments for time entry

**Requisition** - selected Extra Time Requisition

**Sub For** – select employee for Sub For

**Position** – Job assignment that time is being reported against.

Date Worked	Units	Diff	Comments	Requisition	Sub For	Position
06/19/2018	1				Riley, Crystaly Dawyn	
Tue 06/19/2018	4.0000		Some comment here		Riley, Crystaly Dawyn	Substitute - Elementary Teacher

*Time Card Data Export Feature*

The data **Export** feature of the time card panel, as shown belowm can be used to export all entries in the time card list to a number of available output file formats.

Employee Name	Date Worked	Units	Diff	Comments	Requisition	Sub For	Position
Wilton Edward	Mon 06/04/2018	1.0000				Alvarez, Priscella B.	
Jrias, Reyna	Tue 06/19/2018	4.0000		Some comment here		Riley, Crystaly Dawyn	
Margoth Anabel	Tue 06/19/2018	1.0000			ET1800078		
Margoth Anabel	Tue 06/19/2018	1.0000			ET1800078		
Margoth Anabel	Wed 06/13/2018	0.0000	✓	Just Diff Pay	ET1800077		
Margoth Anabel	Tue 06/12/2018	1.0000	✓		ET1800077		
Margoth Anabel	Tue 06/05/2018	7.0000	✓		ET1800077		
Margoth Anabel	Tue 06/05/2018	7.0000	✓		ET1800077		



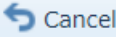
To perform an export, click on the **Export** drop-down and select the desired export type. Once the export type is selected the web browser page will display the exported file at the bottom of the page as shown below. In this example, the time cards were exported to an Excel file. **Hint:** use the filter options to limit the time card entries displayed in the list to export specific entries.

Employee Name	Date Worked	Units	Diff	Comments	Requisition	Sub For	Position
Wilton Edward	Mon 06/04/2018	1.0000				Alvarez, Priscella B.	Substitute - Bus Monitor
Jrias, Reyna	Tue 06/19/2018	4.0000		Some comment here		Riley, Crystaly Dawyn	Substitute - Elementary Teacher
Margoth Anabel	Tue 06/19/2018	1.0000			ET1800078		Instructional Asst.-Behavior Mng., 7 Hr.
Margoth Anabel	Tue 06/19/2018	1.0000			ET1800078		Instructional Asst.-Behavior Mng., 7 Hr.
Margoth Anabel	Wed 06/13/2018	0.0000	✓	Just Diff Pay	ET1800077		Instructional Asst.-Behavior Mng., 7 Hr.
Margoth Anabel	Tue 06/12/2018	1.0000	✓		ET1800077		Instructional Asst.-Behavior Mng., 7 Hr.
Margoth Anabel	Tue 06/05/2018	7.0000	✓		ET1800077		Instructional Asst.-Behavior Mng., 7 Hr.
Margoth Anabel	Tue 06/05/2018	3.0000		Comments here...	ET1800077		Instructional Asst.-Behavior Mng., 7 Hr.

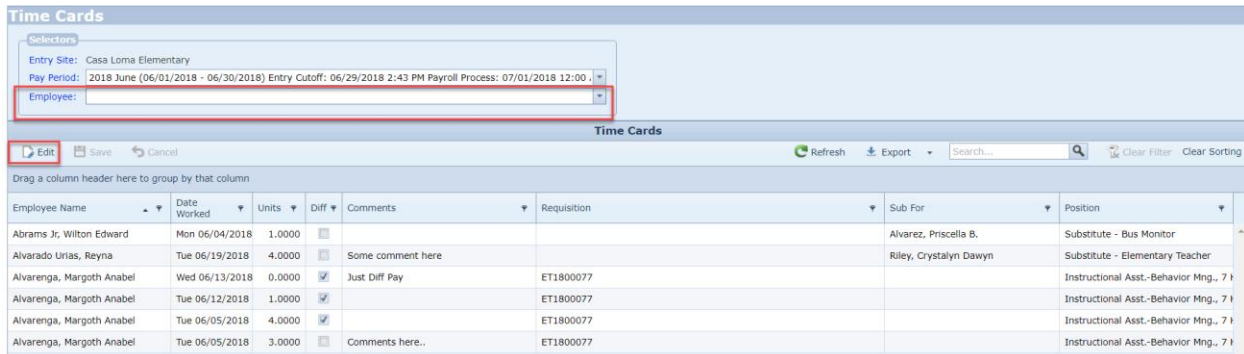
**UPDATING / ENTERING TIME CARD ENTRIES**

The time card screen is initially displayed with the ‘open’ pay period selected and without a selected employee to display all time card entries previously entered for the Pay Period and Entry Site.

## Update Existing Time Card Entries


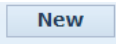

With all time card entries displayed, entries may be modified by clicking the  button to place the Time Cards panel into an 'Edit' session. When the time card panel is placed into an edit session the   buttons become available.

An existing time card entry may be modified by clicking on the desired entry and column and changing the data values as needed. When all required changes have been made the changes can be committed by clicking on the **SAVE** button. If you wish to cancel all changes click on the **CANCEL** button and the time entry list will refresh with it's original data contents prior to the start of the edit session.



Employee Name	Date Worked	Units	Diff	Comments	Requisition	Sub For	Position
Abrams Jr, Wilton Edward	Mon 06/04/2018	1.0000				Alvarez, Priscella B.	Substitute - Bus Monitor
Alvarado Urias, Reyna	Tue 06/19/2018	4.0000		Some comment here		Riley, Crystalyyn Dawyn	Substitute - Elementary Teacher
Alvarenga, Margoth Anabel	Wed 06/13/2018	0.0000	<input checked="" type="checkbox"/>	Just Diff Pay	ET1800077		Instructional Asst.-Behavior Mng., 7
Alvarenga, Margoth Anabel	Tue 06/12/2018	1.0000	<input checked="" type="checkbox"/>		ET1800077		Instructional Asst.-Behavior Mng., 7
Alvarenga, Margoth Anabel	Tue 06/05/2018	4.0000	<input checked="" type="checkbox"/>		ET1800077		Instructional Asst.-Behavior Mng., 7
Alvarenga, Margoth Anabel	Tue 06/05/2018	3.0000		Comments here..	ET1800077		Instructional Asst.-Behavior Mng., 7

## Entering New Time Card Entries

1. Select the Employee. The entry of a new time card entry requires the selection of an Employee. Once an employee is selected the 'Default Settings For New Time Card Entries' section will appear.
2. Default Settings For New Time Card Entries selection. As detailed in the the '**Default Settings For New Time Card Entries**' overview prior in this document, this section indicates the Entry Type, Pay Type and required Extra Time Req and/or Sub For Employee selections for the time entry. Once the required selections have been made an Edit session may be started for the entry of new time card entries.
3. Similar to Updating existing time card entries, start a time card Edit session by clicking on the  button.
4. When an Edit session has been started, clicking on the  button or using the short cut keys **ALT-N** which will open a new time card entry row in the grid as shown below. Enter the desired Date worked, Units, Diff selection and Comments. Click the **NEW** button or press **ALT-N** again to open additional row entries as needed.
5. When all entries have been added and/or updated click on the  button to commit the changes. If you wish to cancel all changes click the **CANCEL** button and the time entry panel will refresh with it's original data content prior to the start of the Edit session. Once all changes have

been saved or cancelled the grid will revert back to View only mode and the EDIT button will become available.

**Entry Grid showing new time entry row**

The screenshot shows the 'Time Cards' interface. At the top, there are selector fields for 'Entry Site' (Casa Loma Elementary), 'Pay Period' (2018 June), 'Entry Cutoff', and 'Employee' (Alvarenga, Margoth Anabel). There are also default settings for 'Entry Type' (Classified Overtime - Req Required) and 'Pay Type' (Hourly). Below this is a table with columns: Date Worked, Units, Diff, Comments, Requisition, Sub For, and Position. A new row for '06/19/2018' with 1 unit is highlighted in yellow. Other rows show previous entries for dates like 06/13/2018, 06/12/2018, and 06/05/2018.

**Deleting existing Time Card Entries**

During an Edit session an existing time card entry can be deleted by clicking on the **Delete** button next to the entry to be deleted. When the entry has been flagged for deletion a **Recover** button will appear in the entry row. Click on the 'RECOVER' button if you wish to cancel the row deletion request before saving.

**Time card entry flagged for deletion**

This screenshot is similar to the previous one but shows the 'Recover' button highlighted in red next to the '06/13/2018' entry. The 'Delete' button is no longer visible for that row, indicating it has been flagged for deletion.

**TIME CARD ENTRY ERROR MESSAGES**

A number of validations are performed when time card entries are being saved. If a validation error is encountered during the SAVE request, changes will not be saved and a validation error message similar to the one shown below will be displayed. The "Validation Message" table below lists the possible validation messages.

Message	Description
This Extra Time Requisition is not valid for the date worked	The 'Date Worked' entered is not within the start and end dates of the select Extra Time Requisition.

<p>Employee cannot exceed the maximum units for this date: MM/dd/YYYY. <i>EmployeeName</i> can have a maximum of 2.0000 additional units. The daily maximum is 12 units per day.</p>	<p>The total number of units entered for the indicated date and employee exceeds the maximum units per date that has been set in the software. The maximum is defined by the district.</p>
<p>Account is not valid after masking. Please check account mask in Time Card Preferences. Account is not valid after masking. Please check account mask in Time Card Preferences.</p>	<p>The time card software can be configured to produce a new account based on the employee's salary account and account mask setup in the system. For BCSD, time entries entered for Substitutes is using account masks to create the salary account with an '01' and '02' district code. This indicates the account created for the Substitute Time Entry based on the Sub For Employee's salary account and the account mask does not exist in the General Ledger. You will need to call the HR department to notify them of this issue.</p>
<p>This Extra Time Requisition is a Req for Substitution and is not valid for the selected Sub For Employee.</p>	<p>The Extra Time Requisition is for the purpose of paying substitutes and the selected employee is not a valid Sub.</p>
<p>This Extra Time Requisition is no longer valid because it has been closed or is not approved.</p>	<p>If a requisition is closed or no longer approved, time card entries cannot be entered against the requisitions.</p>

## PAY PERIOD TIME CARD ENTRY APPROVAL

The 'Time Card Deadlines and Approval' screen, as shown below, is used to approve time card entries for a pay period when the entries are considered to be approved and ready for payroll process.

The screenshot shows the 'Time Card Deadlines and Approval' interface. At the top, there is a dropdown menu for 'Time Card Pay Period' set to '2018 June (06/01/2018 - 06/30/2018)'. Below this, the 'Site Approval' section displays 'Casa Loma Elementary' with an 'Approve' button next to it.

The screen displays the Time Card Pay period being approved, the Site name that is being approved and the **Approve** button to approve the pay period. To approve the pay period click on the APPROVE button. When the pay period has been approved an 'Approved' will appear below the Site name as shown below.

This screenshot shows the same 'Time Card Deadlines and Approval' interface as the previous one, but now the 'Approve' button has been replaced by the word 'Approved' in a red box, indicating that the pay period has been successfully approved.

**IMPORTANT NOTE:** Once the pay period has been approved no further time card entries will be permitted for the indicated pay period and site. The approval of site's pay period can be removed but only by someone with the required software access to unapprove a site's pay period, which is normally the districts Payroll department.

## PAY PERIOD TIME CARD PRINTING

The time card entries for a pay period can be printed at any time, however, the report will only indicate a status of 'APPROVED' when the pay period being printed has been 'Approved' using the 'Time Card Deadlines and Approval' screen.

To print time cards for a pay period navigate to the 'Site Time Card Entries' report by navigating to the 'General Reports' screen location under the web portal menu **Reports/Query → General Reports**. Select Report Area: **Time Card** and Report Name: **Site Time Card Pay Period Entries**, then select the Pay Period to be printed. Click on the **'Print Preview'** button to produce the report output.