

HBS Timekeeping System Update October 26, 2009

October 26, 2009 marks a very exciting milestone in our work to integrate the UCSF Medical Center and Campus onto the HBS Timekeeping system. Starting on the 26th, Phase 1 of the Campus population begins using HBS. Phase 1 includes the monthly go-live for employees who will use the monthly timesheet.

Changes You Will See in HBS

With this go-live, the Medical Center employees using HBS will experience a few changes to the application:

- Edits to Employee Balances Screen
- Functionality to Name Timesheet Groups
- Updates to Changing Timesheet Group Owners
- Solution for Missing Leave Requests
- Message Menu Changes
- Report Updates
- Revised Links for Help Menu

Refer to the instructions below for more information. If you have any questions or need more information, please contact your Supervisor or Department Manager. Thank you!

Edits to Employee Balances Screen

In an effort to provide you more meaningful balance details in a more efficient way, four changes were made to the Employee Balances screen.

This is the screen you access in HBS by clicking on **Employee Balances**.

Time Off						
Category	Starting Balance	Earned	Taken/ Paid	Overused/ Disallowed	Current Balance	Approved Leave
Paid Time Off (PTO) ³	94.310	932.073	856.000	4.650	175.033	0.000
Extended Sick Time (EST)	35.210	186.363	96.000	0.000 ²	125.573	0.000
Holiday (CTU)	0.000	408.000	408.000	0.000	0.000	0.000
CompTime Floating Holiday (CTF)	8.000	24.000	32.000	0.000	0.000	0.000

Months of Service Summary ⁴	
Last Accrual Date	Cumulative Total
04/18/2009	314

1. **A new column *Overused/Disallowed* was added.** This column represents the total number of overused or disallowed leave. Over usage of leave occurs when you report more leave than you have available. For example, an employee reports 8 hours of PTO, but only has 3.35 hours available. This means that 4.65 hours are over used ($8 - 3.35 = 4.65$).
2. **All numbers in the *Time Off* table are displayed as positive numbers.** Before, numbers in the *Taken/Paid* column were shown as negative numbers. Removing the negative sign makes the column values easier to read.

3. **Leave categories only display if you have transactions in those categories.** If you do not have any transactions for a certain category (e.g. Vacation), it will not display. Before, all leave categories were shown for all employees regardless if transactions existed. By removing categories with zero transactions, we are able to show only those categories that are relevant to you.
4. **A new section *Months of Service (MOS)* has been added.** This section tracks your MOS history displaying a cumulative total which represents the total MOS you have earned during your time at UCSF. This MOS data is used when the system determines the Vacation/ PTO accrual rate for each accrual period. The month-by-month details can be viewed by clicking on the date shown in Last Accrual Date column.

Functionality to Name Timesheet Groups

HBS now offers the capability to name timesheet groups. This means that meaningful names can be applied, instead of using the standard (-01, -02, etc.) naming convention. Timesheet group names can be up to seven characters long. Names are applied when a new timesheet group is created. *There are no changes to how you create timesheet groups*; the only change is being able to provide a seven-character name.

Timesheet Group number is always the Management Group Number followed by a dash (-) and up to 7 alpha-numeric characters. For example, 601001-xxxxxxx. The guidelines for specifying these 7 characters are:

- No symbols
- Can all be alpha, e.g., 601001-ATeam
- Can all be numeric, e.g., 601001-01001
- Can be in combination, e.g., 601001-ATeam01

To create a new timesheet group with a name, follow these steps:

1. Log into TPWeb.
2. Click on **Manager Tasks**.
3. Click on **Assign Timesheet Group**.
4. From the **Management Group** drop-down, select the appropriate Management Group and click **go**.
5. Click on the **Manage Timesheet Groups** hyperlink.
6. From the **Give Authority To** drop-down, select the appropriate timesheet group owner.
7. **NEW STEP** – In the **For TS Group** field type the name of the timesheet group.

Note: Timesheet group names can be up to seven characters long. Do not include the dash (-) in this field, the dash is automatically added by the system.

Refer to screen print below.

The screenshot shows two sections of the TPWeb interface. The top section, titled 'Current Timesheet Group Assignment', has a header 'Management Group: 601001' and 'LAST NAME, FIRST NAME'. Below it is a table with columns: 'Give Authority To', 'For TS Group', 'Assigned By', and 'Assigned On'. The table contains one row with values: 'EMPLOYEE', '601001', 'MASTER', and '4/29/2005 5:25:40 AM'. The bottom section, titled 'Create New Timesheet Group', has a table with columns: 'Give Authority To', 'For TS Group', and 'Action'. The 'Give Authority To' dropdown is set to 'LAST NAME, FIRST NAME'. The 'For TS Group' text input field contains 'ATeam' and is circled in red. The 'Action' column has an 'Add Entry' hyperlink.

8. Click on the **Add Entry** hyperlink.

The new timesheet group with the appropriate name will now appear in the **Assign From** and **Assign To** drop-downs and is available for employee assignment following the existing process.

What if I want to rename an existing timesheet group?

Existing timesheet groups cannot be renamed (e.g. from the -01 terminology) to a seven-character name. Instead, you must follow the existing three step process to reassign employees.

1. Create the new timesheet group with the appropriate name.
2. Assign all employees from the old timesheet group to the new named timesheet group.
3. Delete the old timesheet group.

Updates to Changing Timesheet Group Owners

With the functionality to name a timesheet group, the process to change the owner of a timesheet group has been slightly updated. Instead of selecting the timesheet group name from a drop-down, the exact timesheet group name must now be entered.

To change a timesheet group owner, follow these steps:

1. Log into TPWeb.
2. Click on **Manager Tasks**.
3. Click on **Assign Timesheet Group**.
4. From the **Management Group** drop-down, select the appropriate Management Group and click **go**.
5. Click on the **Manage Timesheet Groups** hyperlink.
6. From the **Give Authority To** drop-down, select the name of the new timesheet group owner.
7. **NEW STEP** – In the **For TS Group** field type the name of the timesheet group.

Note: The timesheet group name must be exactly the extension that appears in the For TS Group column without the dash.

Refer to screen print below.

Current Timesheet Group Assignment			
Give Authority To	For TS Group	Assigned By	Assigned On
Original TSG Owner	601001-ATEAM	SULLIVAN,PAUL T	10/14/2009 9:38:39 AM
System Assigned Owner	601001	MASTER	4/29/2005 5:25:40 AM

Create New Timesheet Group		
Give Authority To	For TS Group	Action
New TSG Owner	ATEAM	Add Entry

8. Click on the **Add Entry** hyperlink.

The new timesheet group owner will now be listed in the Give Authority To column.

Solution for Missing Leave Requests

Missing leave requests can now be recreated and resubmitted for Supervisor approval. You may have never experienced this issue because it was rare, but here is the scenario:

1. Employee submits a leave request.
2. Leave request is not saved properly and HBS notifies the employee via email that the leave request must be recreated.
3. Additionally, the Manager receives notification of a pending leave request and logs into HBS to view it. *No leave request displays.*
4. Employee tries to recreate the request.
Issue – error message displays that this leave request already exists because a partial record was stored in HBS.

Resolution: Employee is now able to recreate and resubmit the leave request in its entirety.

Message Menu Changes

Two changes were completed to the **Message Menu** screen in TPWeb.

1. **Leave of Absence (LOA):** A new alert is displayed, which provides key data points about an employee's LOA (e.g. Employee Name, Start and End Dates, Type of Leave, and Reason). This message is provided for Supervisors and those with Delegated Authority.

Leave of Absence	
Employee	Employee #1 is on LOA from 10/06/2009 to 01/06/2010, Type: Paid, Reason: Family and medical leave with pay.

2. **Time Off Request:** The existing alert for pending leave requests now displays for those with Delegated Authority. Previously, this message was only provided for Supervisors.

Time Off Request Message(s)	
Employee #1	has Requested TimeOff from 11/23/2009 to 11/25/2009 on 10/14/2009 04:16:59.

Report Updates

Some reports have been updated to include required selection criteria. When running reports in TPWeb, any field name marked with an asterisk is required to run the report.

This means that the report cannot be processed without defining a search term for the required field.

Refer to screen print below where 'Pay Cycle' is a required field name.

Step 1. Please define criteria:

Field Name:	Condition:	Value:
< Select >	< Select >	
< Select >		
Employee #		
Employee Name		
Management Group Owner		
* Pay Cycle		
Timesheet Group		

Step 2. Find items that match current criteria:

<Add criteria from above to this list>

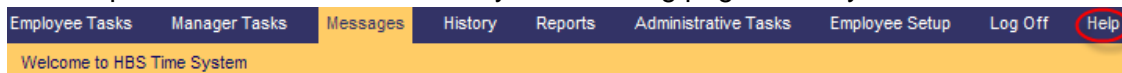
Additionally, some reports and report categories also contain descriptions as shown below.

Close Out Timesheet Errors & Warnings

List all Timesheets, by period that have timesheet validation errors or warnings. This report is used at the end of the timesheet period while processing the timesheets.

Revised Links for Help Menu

The Help link within HBS now directs you to landing page where you can access the HBS training materials.



Click on the **Help** hyperlink to display the HBS Timekeeping System page where you can click on **UC Learning Center** and access the training materials for Medical Center employees.

HBS Timekeeping System

Medical Center Employees: Refer to HBS training available online at the [UC Learning Center](#) or contact your Supervisor for guidance.

Campus Employees: Refer to [HBS training materials](#) and [job aids](#) or contact your HBS Management Group Owner for guidance.

If you have any questions or need more information, please contact your Supervisor or Department Manager.
Thank you!