

## Attendance Management Details:

The Attendance Management Details pages were designed to capture information related to the attendance management coaching and deviation processes. The pages will capture information related to the coaching level and the dates the coaching took place, as well as information related to deviations from the coaching process.

### Navigation

#### AI Custom > AI Benefits > AI Attendance Mgmt Details

**AI Attendance Mngmnt Details**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

EmplID:  begins with ▼

Name:  begins with ▼


Last Name:  begins with ▼

Business Unit:  begins with ▼

Organizational Relationship: =  ▼

Alternate Character Name:  begins with ▼

Include History  Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

### Steps:

1. Enter the employee ID in the EMPLID field or enter the employee's name in the applicable fields.
2. Click on the  button to advance to the AI Employee Coaching Details page.

## **FIELD DEFINITIONS – Employee Coaching Details:**

The screenshot shows a web application interface for "Jane Doe" (Empl ID 001234). The main content area is titled "Employee Coaching Details" and contains a table with the following fields:

*Coaching Code	Description	*Coaching Date
<input type="text"/>		11/03/2015

Below the table is a "Comments" text area. At the bottom of the form, there are several navigation buttons: "Save", "Return to Search", "Previous tab", "Next tab", "Include History", and "Correct History".

### ***Coaching Code:***

This field will be used to capture the coaching level code as follows:

- CL1 – Coaching Level 1
- CL2 – Coaching Level 2
- CL3 – Coaching Level 3

### ***Description:***

The description of the coaching level code will be displayed.

### ***Coaching Date:***

This field will be used to capture the date the coaching session took place.

### ***Comments:***

This field is used to capture additional comments about the coaching session, etc.

**FIELD DEFINITIONS – Employee Deviation Details:**

AI Employee Coaching Details | AI Employee Deviation Details

Jane Doe Empl ID 001234

Employee Deviation Details Find | View All First 1 of 1 Last

*Deviation Code	*Deviation Start Dt	Deviation End Date	Deviation Hours
Deviation	11/03/2015		

Comments

Save | Return to Search | Previous tab | Next tab | Include History | Correct History

[AI Employee Coaching Details](#) | [AI Employee Deviation Details](#)

***Deviation Code:***

This field will default to Deviation:

***Deviation Start Dt:***

This field is used to capture the start date of the deviation period.

***Deviation End Dt:***

This field is used to capture the end date of the deviation period.

***Deviation Hours:***

This field is used to capture the number of hours in the deviation period.

***Comments:***

This field is used to capture additional comments about the deviation, etc.

## **Attendance Management Report:**

The purpose of this report is to support the Attendance Management Program by providing managers with information regarding sick and special leave usage. The report will provide information on the type of leave used based on six categories, and will display the information under the appropriate heading determined by the number of hours used as follows:

- Hours greater than or equal to 67.5 and less than 101.25.
- Hours greater than 101.25 and less than 135.00
- Hours greater than or equal to 135.00

The start date of the Attendance Management Report will be one year previous to the date entered in the As of Date field. If the As of Date field is left blank, the start date will be one year previous to the current date. The report will not include any information prior to January 4, 2015.


Page Navigation:


**AI Custom > AI Benefits > AI Benefits Reports > AI Attendance Management Rpt**





AI Attendance Mgmt Rpt


Run Control ID: Attendance      Report Manager    Process Monitor     

Report Request Parameter(s)

Department:  


As Of Date:  

Personalize | Find |      First  1 of 1  Last

EmpID	Name		
1	<input type="text"/> 	<input type="button" value="+"/>	<input type="button" value="-"/>

**Steps:**

1. Enter the department ID you want to report. This report will accommodate roll up reporting so entering a higher level department will provide results on all employees in the departments that roll-up to the one entered in the field.
2. Enter the date you want to report to in the As of Date field. The report will include data for the twelve months preceding the date entered in the As of Date field. If the As of Date field is left blank the report will include data for the twelve months preceding the current date.
3. If you wish to report on an individual employee, enter the employee ID in the field. If you want to report on several employees click on the  button to insert more rows into the parameter page and enter multiple employee IDs.
4. Click on the  button to run the report.

The report will provide details on leave taken within the six categories using the TRC codes noted under each category.

**FIELD DEFINITIONS:**

**Empl ID:**

This field displays the employee's ID.

**Name:**

This field displays the employee name (first, last).

**Rcd #:**

This field displays the record number for the job record being reported

**Job Code Desc:**

This field displays the description of the job code the employee is assigned to for the job record being reported.

**Multi Jobs:**

If the hours reported for the employee are a sum of the hours from multiple job records, a Y will be displayed in the Multi Jobs field. The hours may also be from job records outside your security access or from records that are now inactive.

**Union:**

This field displays the union code from the job record being reported.

**FTE:**

This field displays the full-time equivalency from the job record being reported.

***Sick:***

Reports sick leave taken under the following TRC codes:

- SICKP – Sick Taken
- SPMDM – Medical Appointment – Reduce Sick
- SPMOA – Medical Appointment – Outside Area

***Sick – Dr. Certificate:***

Reports all sick leaves taken under the following TRC codes:

- SCKDR – Sick – Dr.'s Statement

***Illness in Family:***

Reports all special leave taken under the following TRC codes:

- SPFMI – Illness in Family Paid

***Medical Appointment: (IUOE Collective Agreement Only)***

Reports all leave taken under the following TRC codes:

- SPMED – Medical Appointment Paid

***Ill During Shift:***

Reports all leave taken under the following TRC codes:

- ILDSP – Ill During Shift Paid

***Unpaid Sick:***

Reports all unpaid sick leave taken under the following TRC codes:

- SICKU – Sick Unpaid

***Total Hours:***

This field reports the total number of hours for all categories

***Coaching Code:***

This field reports the most current coaching code from the Employee Coaching Details page. A coaching code will only be displayed if the coaching date is equal to or less than one year.

***Coaching Date:***

This field reports the most current coaching date from the Employee Coaching Details page.

***Deviation Start Date:***

This field reports the date from the Deviation Start Date field on the Employee Deviation Details page.

***Deviation End Date:***

This field reports the date from the Deviation End Date field on the Employee Deviation Details page. **Note: Information related to a deviation will only be reported if the date in the Deviation End field is greater than the report start date.**

***Deviation Hours:***

This field reports the number of hours that were entered in the Deviation Hours field of the Employee Deviation Details page.

**Note:**


- The start date of the Attendance Management Program was January 4, 2015. Only hours reported on or after January 4, 2015 will be included in the calculations for the report.
- Any leave reported that is equal to or less than one hour in duration will be excluded from the calculation of hours reported.
- Hours will be reported from both active and inactive job records if the hours were taken during the reporting period.
- Terminated job records will not be displayed in the report. However, hours taken during the reporting period that are associated with a terminated record will be included in the calculation of hours used.
- If an employee has hours reported under an inactive job record (i.e. completed temporary assignment), and they do not have any hours reported under their active record, the employee will not be included in the report until they use leave in their active record.
- Casual job records will not be displayed in the report. However, hours taken during the reporting period that are associated with a casual record will be included in the calculation of hours used.
- Although the hours reported will be a sum from all job records, the job record information displayed will be based on the user's departmental security access.
- If an employee has more than one active job record in the department being reported they may be included in the report multiple times (i.e.: different job code or FTE). However, the hours taken values are summed from all job records and the data reported will be the same for all job records.

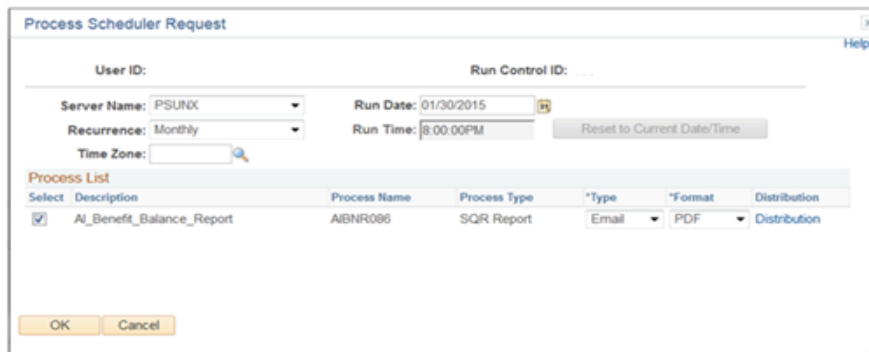


## Scheduling the Attendance Management Report:

Since this report is designed to report information based on the previous twelve months, and it does not require you to select different parameters each time you run the report, you can schedule the report to run automatically. The following outlines the steps for scheduling the report and notifying you via e-mail that the report has been generated.

### Steps:

1. Navigate to the Attendance Management Report and enter the appropriate department ID in the Department field. If you are responsible for multiple departments and you want them included in one report, you can leave the Department field blank and the report will be generated based on your security access.
2. The As of Date field can be left blank. The system will use the current date as the As of Date.
3. Click on the  button and the system will advance to the Process Schedule Request page.



Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	AI_Benefit_Balance_Report	AIBNR086	SQR Report	Email	PDF	Distribution

4. Verify the value in the Server Name field is set to PSUNX or click on the down arrow and select PSUNX from the list of values.
5. Click on the down arrow next to the Recurrence field and select the value of Monthly. The report will be automatically generated and e-mailed to you on the first day of each month. (i.e. the February 1<sup>st</sup> report would include all data in payable time up to and including February 1<sup>st</sup>).
6. The Run Time field will default to 8:00pm.
7. Click on the down arrow under Type and select Email.
8. Click on the Distribution link. The system will advance to the Distribution Details page.

The Distribution Details page allows you to enter information related to the e-mail that will be sent when the report has been processed.

**Distribution Detail** x  
[Help](#)

Process Name: AIBNR086  
Process Type: SQR Report  
Folder Name:   
Retention Days:

**Email Only**

Email Subject:       Email With Log:       Email Web Report:

Message Text:

Email Address List:

**Distribute To**

*ID Type	*Distribution ID
User	TATEST

**Steps:**

9. In the E-mail Subject field enter Attendance Management Report.
10. If you want to add a message to your e-mail enter the message text in the Message Text field.
11. Enter your work e-mail address in the Email Address List field.
12. Click on the OK button and the system will return you to the Process Scheduler Request page.
13. Click OK on the Process Scheduler Request page and the system will return you to the report parameter page.
14. You can click on the link to the Process Monitor and view the status of the report or click on Home to return to the Main menu.
15. When the report has been processed you will receive an e-mail with the report as an attachment.

## Attendance Management Program – Supporting Documentation

In addition to the Attendance Management Report, managers also have the ability to review and/or report on the detailed information related to an employee's leave. The following pages and reports within the PeopleSoft application can be used to support the coaching process.

**Note: The TRC Report does not have the same reporting criteria as the Attendance Management Report and will not include data from records that are outside the user's security access.**

### TRC Report:

The TRC Report will provide further details pertaining to the employee's leave. This report will include the date the leave was taken, number of hours used by date and the estimated cost of the leave.


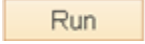
The TRC Report provides flexibility in your reporting criteria; however a report can also be created to report on only the TRCs included in the Attendance Management Report. To create a TRC Report that will maintain your TRC selection you will need to create a new Run Control ID as follows:

### Steps:

1. Navigate to the TRC Report – AI Custom>AI Time and Labor>AI Time and Labor Reports>AI Time Reporting Code (TRC) Report.
2. Click on the Add New Value tab.
3. In the Run Control ID field enter Attendance\_Mgmt\_TRC\_Report. A Run Control ID cannot have any spaces, so each word must be separated by an underscore.
4. Click on the Add button and the system will advance to the parameter page for the TRC Report.
5. In the From Date field, enter January 4, 2015.
6. In the End Date field, enter the current date.

**Note: The January 4, 2015 date would only be used for the first year of the Attendance Management Program. After the first year of the program, the date in the From Date field would be the date you want your report to begin. The dates in the From Date and End Date fields should correspond to the period used for the Attendance Management Report.**

7. In the Employee ID field, enter the applicable employee ID(s).

8. In the Time Reporting Code field enter the following TRC codes. You will need to click on the  sign to add each TRC code. (SICKP, SPMDM, SPMOA, SCKDR, SPFMI, SPMED, ILLDSP, SICKU).
9. Click on the  button to run the report.

Each time you want to run the TRC report for attendance management coaching, select the Run Control ID – Attendance\_Mgmt\_TRC\_Report and the information selected above will be displayed in the parameter page. You can enter a new date range and new employee IDs, but the TRC codes do not need to be re-entered.

## Viewing Timesheet Data Using Calendar Views:

The Time and Labor Calendar View pages allow the user to view information from the employee's timesheet and schedule in one view. The page also displays leave information by color coding the time based on categories of TRC codes.

There are five categories (groupings) of TRC codes:

- Sick Leave
- Sick Leave Dr. Statement
- Special Leave
- Special Leave Illness in Family
- Vacation Taken

### Page Navigation:

**Manager Self Service > Time Management > View Time > Monthly Time Calendar**


There are three options for viewing information. Select the option based on the period you would like to view.

***Monthly Time Calendar***

***Weekly Time Calendar***

***Daily Time Calendar.***

### Steps:

1. Enter the employee ID or the employee name in the appropriate field. If you want to view the calendar for all employees in the department, enter the group ID in the Group ID field.
2. Click on the  button to retrieve your employee(s).

The screenshot shows a web interface for viewing employee attendance. At the top, there are three tabs: 'Daily Time Calendar', 'Weekly Time Calendar', and 'Monthly Time Calendar'. The 'Monthly Time Calendar' tab is selected and circled. Below the tabs is a 'View Criteria' section with dropdown menus for 'Month' (set to '08 - August') and 'Year' (set to '2014'), and input fields for 'Start Time' and 'End Time'. To the right of these are links for 'Previous Month' and 'Next Month'. Below the 'View Criteria' is a section for 'Reported or Payable Hours' with two radio buttons: 'Reported Hours' (which is selected) and 'Payable Hours'. At the bottom is a 'Display Options' section with several checkboxes: 'Show Schedule', 'Show Training Hours', 'Show Absences', 'Show Holidays', 'Show Planned Overtime', and 'Show Symbols'. A 'Refresh View' button is located at the bottom right of the 'Display Options' section.

The three types of calendar views will be displayed at the top of the View Criteria box. The view that you are currently in will be gray.

**Note:** If you want to change the current view to a different view, click on the blue link for Daily or Weekly. You will need to reenter the employee ID and enter the criteria for the new view selected.

**Month** – Displays the month that you are viewing. If you want to change the month value, click on the down arrow and select it from the list of values. If you change the month value, click on the [Refresh View](#) button to refresh the page.

**Year** - Displays the current year. If you want to change the year value, click on the down arrow and select it from the list of values.

**Previous Month** – Click on this link to display the information from the previous month.

**Next Month** – Click on this link to display the information from the next month.

**Reported Hours** – This radio button will default and displays the hours reported on the timesheet.

**Payable Hours** – If you want to view the hours from Payable Time rather than Reported Time, click on the radio button next to Payable Hours.

**Show Schedule** - If you want to view the employee's scheduled time with the reported time, turn the Show Schedule button on and the scheduled hours will be displayed below the reported hours.

The other options are not being used, however the employees' leave time will be displayed without using these options.

Monthly Time Calendar

Last Name	First Name	Employee ID	Job Title	Total	Sat. 01	Sun. 02	Mon. 03	Tue. 04	Wed. 05	Thu. 06	Fri. 07	Sat. 08	Sun. 09	Mon. 10	Tue. 11	Wed. 12	Thu. 13
Doe	Jane	000310	LPN-	196.50	-	-	-	24.00	27.00	28.50	27.00	24.00	28.00	27.00	-	27.50	28.00

Legend

<span style="background-color: #90EE90; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Default Reported/Payable Time	<span style="background-color: #CCCCFF; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Category Vacation Taken	<span style="background-color: #FFB6C1; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Category Sick
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**Steps:**

3. When you have completed your selection of criteria, click on the Refresh View button to refresh the page. The employee’s name, job title, day of the week and date will be displayed in the heading.
4. If you chose Reported Time:
  - The number of hours reported on the timesheet for the date will be displayed.
 If you chose Payable Time:
  - The number of hours in payable time for the date will be displayed.

**Note:** Reported or payable time hours may be greater than or less than the scheduled hours based on the information that was either entered on the timesheet or processed in payable time from the Time and Labor rules.

For example: If overtime was reported for the employee, the reported and/or payable hours may be greater than the scheduled hours. If the employee had statutory holiday hours banked on the same day they had reported hours, the payable hours would be greater than the scheduled hours, etc.

Only one color code can be displayed for each date. If the employee has more than one type of time reported on the same day all hours will be reflected in the color code for the leave taken.

For example: If an employee had 6 hrs of REG time and 2.50 hours of vacation taken, the time will be displayed with the color code of vacation taken and 7.50 hours will be displayed. If you need to confirm how many leave hours were used in a particular day you can click on the value in the box.

If you turned the Show Schedule button on, the scheduled hours will be displayed below the reported/payable hours.

A legend will also be displayed that describes which each color in the grid represents.

To view the details of what occurred on a particular date, click on the hours in the box and a new page will open with the time details and payable time information.

Time Details For 03/06/2014

Jane Doe  
LPN

Employee ID  
Empl Rod Nbr 0

Reported Elapsed Time

Quantity	Type	Time Reporting Code
7.50	Hours	Vacation Taken

Reported Punched Time

Quantity	Punch Type	Punch Date and Time	Time Zone	Time Reporting Code
8.00	In	03/06/2014 11:00PM	AST	Regular Pay

Payable Time

Quantity	Type	Time Reporting Code	Payable Status	Reason Code	Estimated Gross	Labor Distribution Amount	Diluted Amount	Currency Code
7.50	Hours	Vacation Taken	Closed		\$165.750000	\$165.750000	\$165.750000	CAD

[Return to Calendar](#)

**Reported Elapsed / Punch Time** - The Reported Elapsed Time section reports the number of hours entered in the quantity field in the timesheet and a description of the TRC that was used to report the hours. The Reported Punch Time section will report the in punch time and the out punch time from the timesheet. It also reports the total quantity of hours for the in and out punch.

**Note:** For punch employees, the quantity of hours is the total quantity of hours, and does not reflect the meal break deduction that would be applied.

**Exceptions** – This section reports any issues related to the time reported on the timesheet. Exceptions must be reviewed and/or corrected to ensure the employee is paid appropriately.

**Payable Time** - This section reports the information from the payable time page and reflect the number of hours the employee will be paid, the TRC code that the hours are reported under, the status of the time (i.e.: needs approval, approved, estimated, closed, etc.) and the estimated cost of the hours.

Click on the [Return to Calendar](#) link to return to the calendar view page.