



# **Admin Guide: ASCENDER EmployeePortal WorkJournal Setup**



# Table of Contents

<b>Admin Guide: ASCENDER EmployeePortal WorkJournal Setup</b> .....	i
<b>Admin Guide: ASCENDER EmployeePortal WorkJournal Setup</b> .....	1



# Admin Guide: ASCENDER EmployeePortal WorkJournal Setup

The WorkJournal feature allows employees to create timesheet entries for time worked on a specific day.

The purpose of this document is to guide you through the necessary steps to set up the appropriate access for employee WorkJournal requests via EmployeePortal.

Some of the images and examples provided in this document are for informational purposes and may not completely represent your LEA's process.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).

## Prerequisites

Update roles/users in Security Administration to allow WorkJournal permissions. You can add permissions to an existing role or create a new role.

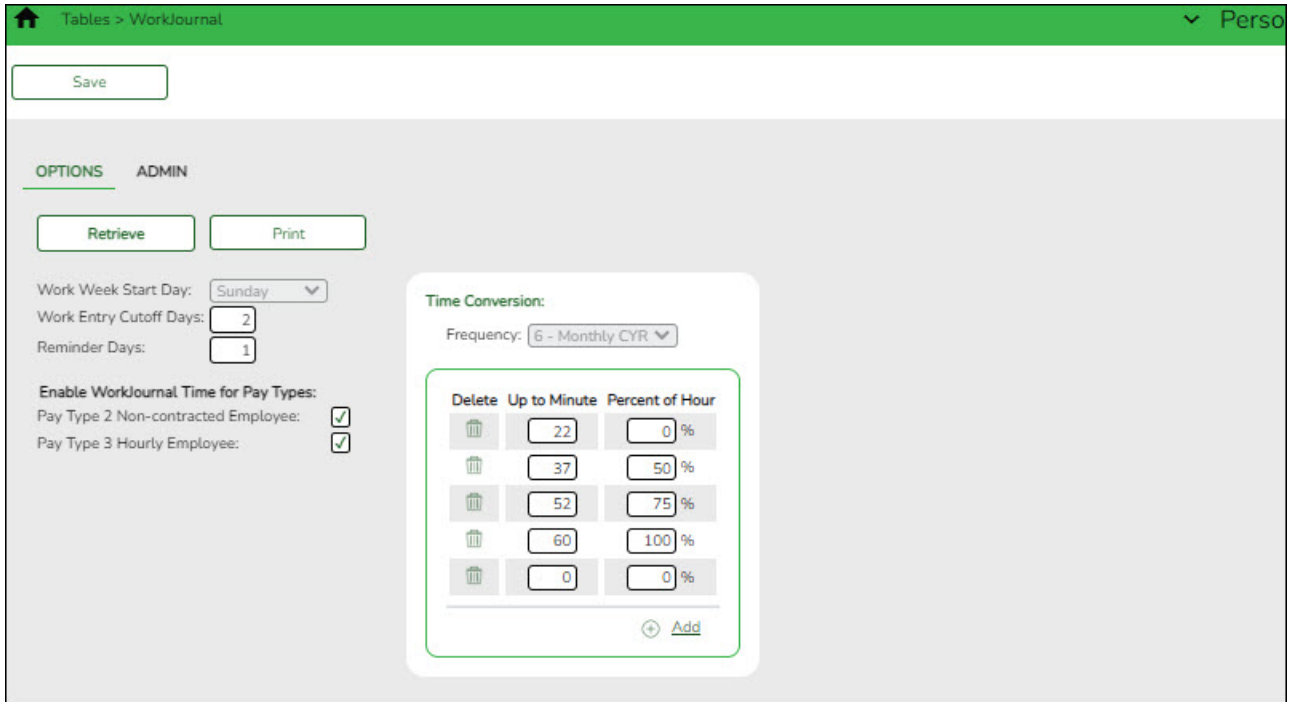
## Set up Personnel Settings

Perform the following tasks to ensure that the WorkJournal request feature in EmployeePortal is set up properly and functions as intended for employees.

1. [Set EmployeePortal WorkJournal options](#).

[Personnel > Tables > WorkJournal > Options](#)

Set up the following WorkJournal options to determine how employees enter their time based on the work week, time conversion table, and pay type when creating WorkJournal entries in EmployeePortal.



Field	Description
<b>Work Week Start Day</b>	<p>Click  to select the beginning day of the work week. This day determines the day that the employee can select in the <b>Work Week Start Date</b> field in EmployeePortal. For example, if the selected day is Tuesday, then the employee can only select Tuesday dates when entering WorkJournal entries in EmployeePortal.</p> <ul style="list-style-type: none"> <li>• <i>Sunday</i></li> <li>• <i>Monday</i></li> <li>• <i>Tuesday</i></li> <li>• <i>Wednesday</i></li> <li>• <i>Thursday</i></li> <li>• <i>Friday</i></li> <li>• <i>Saturday</i></li> </ul> <p>This day cannot be changed if there is at least one employee record in the employee WorkJournal time table.</p>
<b>Work Entry Cutoff Days</b>	Type the number of cutoff days the employee has to enter a timesheet entry. Valid values are 0-30.
<b>Reminder Days</b>	Type the number of days before the cutoff day that an automated email message will be sent to employees as a reminder that they have yet to submit their timesheet entries. Valid values are 0-9.

Under **Enable WorkJournal Time for Pay Types:**

<b>Pay Type 2 Non-contracted Employee</b>	Select to enable WorkJournal time tables for pay type 2 (non-contracted) employees.
<b>Pay Type 3 Hourly Employee</b>	Select to enable WorkJournal time tables for pay type 3 (hourly) employees.

Under **Time Conversion:**

<b>Frequency</b>	<p>Click  to select the pay frequency for which you want to set up a time conversion table. Depending on the selected pay frequency, the corresponding time conversion table is displayed.</p> <p>This field is read only if your LEA only uses one pay frequency to pay employees. Pay frequencies are set up on the <a href="#">District Administration &gt; Tables &gt; District Information &gt; Payroll Frequencies</a> tab.</p>
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Click **+Add** to add a row.

<b>Up to Minute</b>	Type the number of minutes to represent a specific percentage of the day. Valid values are 1-60.
<b>Percent of Hour</b>	Type the percent of day to represent a specific number of minutes. Valid values are 1-100%.

Click **Save**.

2. [Add WorkJournal admin users.](#)

[Personnel > Tables > WorkJournal > Admin](#)

*At this time, this page does not function as intended. This will be corrected with future programming.*

Add WorkJournal admin users. WorkJournal admin users will have access to view timesheet details in ASCENDER EmployeePortal.

**Notes:**

- It is recommended that LEAs set up at least one admin per campus. For example, each campus could set up a payroll clerk to view timesheet details.
- campus can have multiple admin users; however, admin users cannot be assigned to multiple campuses.
- These admin users cannot edit or delete WorkJournal requests and are **not** approvers for WorkJournal requests.

3. [Set WorkJournal options for \(CYR/NYR\) extra duty codes.](#)

[Personnel > Tables > Salaries > Extra Duty](#)

Select the following to identify which extra duties will use standard overtime rates and be displayed for WorkJournal in EmployeePortal.

Tables > Salaries

Save

LOCAL ANNUAL   HOURLY/DAILY   EXTRA DUTY   FUND TO GRANT   STATE MINIMUM   SUBSTITUTE   MIDPOINT

Records  
 Pay Acty: ALL  
 Wholly Sep: ALL

Retrieve   Print

Delete	Code	Description	Amount	Include in Dock Rate	TRS Position Cd	Use for ST OT	Display in WJ
	01		500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	02		500.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	10		4,735.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	11		1,800.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	19		648.13	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	20		4,364.00	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

<b>Use for ST OT</b>	Select to indicate that the extra duty code will use the standard overtime rate in WorkJournal. This field is only enabled for S-type extra duty codes and can only be selected for one S-type extra duty code.
<b>Display in WJ</b>	Select to display the extra duty code in WorkJournal. This field is only enabled for G-type and S-type extra duty codes.

Click **Save**.

4. Set WorkJournal options for (CYR/NYR) job codes.

Personnel > Tables > Job/Contract > Job Codes

Use the following options to identify how employees with certain job codes enter their time and how their time is calculated for WorkJournal entries in EmployeePortal.

Tables > Job/Contract

Save

JOB CODES   CONTRACT CLASS   CONTRACT TERM   CONTRACT YEAR   EXTRACT ID   TERMINATION REASON

Retrieve   Print

Delete	Job Code	Job Description	Workers' Comp Code	FTE Hrs	No FTE	Time Option	Pay Type 2 Dock	Auto Lunch
	1001			40	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	AIDE			40	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	AP			40	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	AST			40	<input type="checkbox"/>	N None	<input type="checkbox"/>	0
	BAS			40	<input type="checkbox"/>	C Clock Time	<input checked="" type="checkbox"/>	30
	BMGR			40	<input type="checkbox"/>	N None	<input type="checkbox"/>	0

<b>Time Option</b>	<p>Click  to select the time option to be used for WorkJournal in EmployeePortal.</p> <ul style="list-style-type: none"> <li>• <i>A Attendance Only</i> - Select to allow the job code to be used in WorkJournal for attendance purposes only. Pay information <b>will not</b> be transferred to Payroll when the Import WorkJournal Requests utility is processed.</li> <li>• <i>C Clock Time</i> - Select to allow the job code to be used in WorkJournal for timesheet entries. Pay information will be transferred to Payroll when the Import WorkJournal Requests utility is processed.</li> <li>• <i>N None</i> - Select to exclude the job code from WorkJournal. If selected, employees will not be able to submit entries to the job code in EmployeePortal.</li> </ul> <p>This field must be set to A or C to allow the job code to accept WorkJournal entries EmployeePortal.</p>
<b>Pay Type 2 Dock</b>	<p>Select to allow docks to be created for pay type 2 employees.</p> <p>For example, if this field is selected and a pay type 2 employee has 37 in the <b>Wkly Hrs Sched</b> field on the Payroll &gt; Maintenance &gt; Staff Job/Pay data &gt; Job Info tab and only submits 35 hours in WorkJournal, the employee will be docked two hours. The system will account for any submitted leave requests.</p>
<b>Auto Lunch</b>	<p>Indicate the amount of time (<b>in minutes</b>) for the employee's lunch period. If an employee creates a timesheet entry in WorkJournal for more than five hours for a job code with an auto lunch, that amount of time is automatically deducted from their total time for the selected job code on that work day. Valid values are 1-60.</p>

Click **Save**.

## Set up and verify Payroll Settings

### 1. [Verify contract begin and end dates.](#)

[Payroll > Maintenance > Staff Job/Pay Data > Job Info](#)

Verify that the employee's job info record is set up with accurate data for WorkJournal entries in EmployeePortal.

- The employee must be assigned to an active job code in the current year for the date that they are trying to create a WorkJournal entry in EmployeePortal.
- Under **Calendar Info**, verify the employee's contract **Begin Date** and **End Date** for the job code. The date of the WorkJournal entry must be within the contract begin and end dates for the applicable job code. If not, the following message is displayed on the Add/Edit Clock time pop-up window in EmployeePortal: "No ACTIVE Job Code for this Date".
  - Only the employee's current year primary active job is displayed in the **Job Code** drop down in EmployeePortal.

As mentioned previously, the **Time Option** for the employee's assigned job code must be set to A Attendance Only or C Clock Time on the [Personnel > Tables > Job/Contract > Job Codes](#) in order for the job code to be displayed in the **Job Code** field.

## 2. Designate the employee/direct supervisor relationship.

This setting serves two purposes, it determines the WorkJournal (and Leave Request) approval path for the employee and allows the supervisor to access the Supervisor menu in EmployeePortal.

[Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor](#)

Delete	Employee Number	Last Name	Gen	First Name	Middle Name	Supervisor Number	Last Name	Gen	First Name	Middle Name	User ID
	000624	[redacted]	SA	[redacted]	[redacted]	000618	PRESLEY	[redacted]	ELVIS	[redacted]	TESTUSER

## Enable the WorkJournal Request Feature

### 1. Set up district EP options.

[Payroll > Tables > District EP Options > EmployeePortal Options](#)

Set up the following EP options to allow employees to view the WorkJournal menu in EmployeePortal.

Tables > District EP Options

Save

EMPLOYEEPORTAL OPTIONS LEAVE CAMPUSES

Retrieve Print

Use:  Employee Number  Social Security Number

**Enable**

- EmployeePortal System
- Calendar Year to Date
- Current Pay Information
- Deductions
- Earnings
- Leave Balances
- W-2 Information
- Self-Service Demographic
- Self-Service Payroll
- W-2 Electronic Consent
- 1095 Information
- 1095 Electronic Consent
- Leave Request
- Travel Reimbursement Request
- WorkJournal**

**Messages**

- EmployeePortal System
- Calendar Year To Date
- Current Pay Information
- Deductions
- Earnings
- Leave Balances
- W-2 Information
- Self-Service Demographic
- Self-Service Payroll
- W-2 Electronic Consent
- 1095 Information
- 1095 Electronic Consent
- Leave Request
- Travel Reimbursement Request
- WorkJournal**

This is a WorkJournal message for all employees.

- Under **Enable**, select **WorkJournal** to enable the WorkJournal request feature in EmployeePortal.
- Under **Messages**, select **WorkJournal** to enable employees to view a preset message on the WorkJournal page in EmployeePortal.
  - o Type the applicable message in the text box.
  - o The message is displayed in red at the top of the WorkJournal page in EmployeePortal after the record is saved.

Pay Frequency: 6 - Monthly CYR

Work Week Start Date: 05-08-2022 Retrieve Submit Time Conversion Table

**This is a WorkJournal message for all employees.**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Calendar Info							
In							
Out							
Total Time	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Leave Total	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Daily Total	0:00	0:00	0:00	0:00	0:00	0:00	0:00
<b>Weekly Totals</b>		Time: 0:00		Leave: 0:00		Total Hours: 0:00	

- Click **Save**.



After the above steps are completed, employees can submit WorkJournal requests in EmployeePortal.

## Approve WorkJournal Requests

In EmployeePortal, on the Supervisor > Approve WorkJournal page, supervisors can approve or return WorkJournal requests from their employees.

### 1. Approve or return WorkJournal requests.

When you access the Approve WorkJournal page, a list of WorkJournal requests pending your action is displayed if any.

Select the requests that you want to approve or return. You can select individual requests (checkboxes) or select the top **Select All** check box to select all requests (checkboxes).

The following information is displayed for each WorkJournal request.

Field	Description
<b>Detail</b>	Click  to view the WorkJournal request details. The WorkJournal request details are display only and cannot be edited.  Click <b>Cancel</b> in the upper-right corner to close the request details and return to the Approve WorkJournal page.
<b>Pay Freq</b>	The pay frequency for which the employee's WorkJournal request was submitted is displayed.
<b>Employee</b>	The employee's name is displayed.
<b>Week Start</b>	The <b>Work Week Start Date</b> for the employee's WorkJournal request is displayed.
<b>Pay Date</b>	The next unprocessed pay date for the <b>Work Week Start Date</b> and <b>Pay Frequency</b> within the pay period is displayed.  <a href="#">Examples</a>
<b>Work Total</b>	The employee's total WorkJournal work week hours (minus leave hours) is displayed.

Click **Approve** to approve the request. After you approve the request, an email message is sent to the employee notifying them of the action (approved/returned) taken on the request.

- If the request is approved or returned, the request is no longer displayed in the list of pending WorkJournal requests.
- If the request is not selected and no action is taken, the request remains in the list of pending WorkJournal requests.

Click **Return** to return the request to the employee. The request is no longer displayed in the list of pending WorkJournal requests.

## Import WorkJournal Requests

The payroll department will use the [Payroll > Utilities > Import WorkJournal Requests](#) page to import employee WorkJournal requests for each of the work weeks in the pay period that were submitted through EmployeePortal. Only WorkJournal entries that are in an Approved status are imported. This process creates a pay transmittal to be processed by payroll.