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Admin Guide: ASCENDER EmployeePortal WorkJournal Setup

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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 WorkJounal 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.

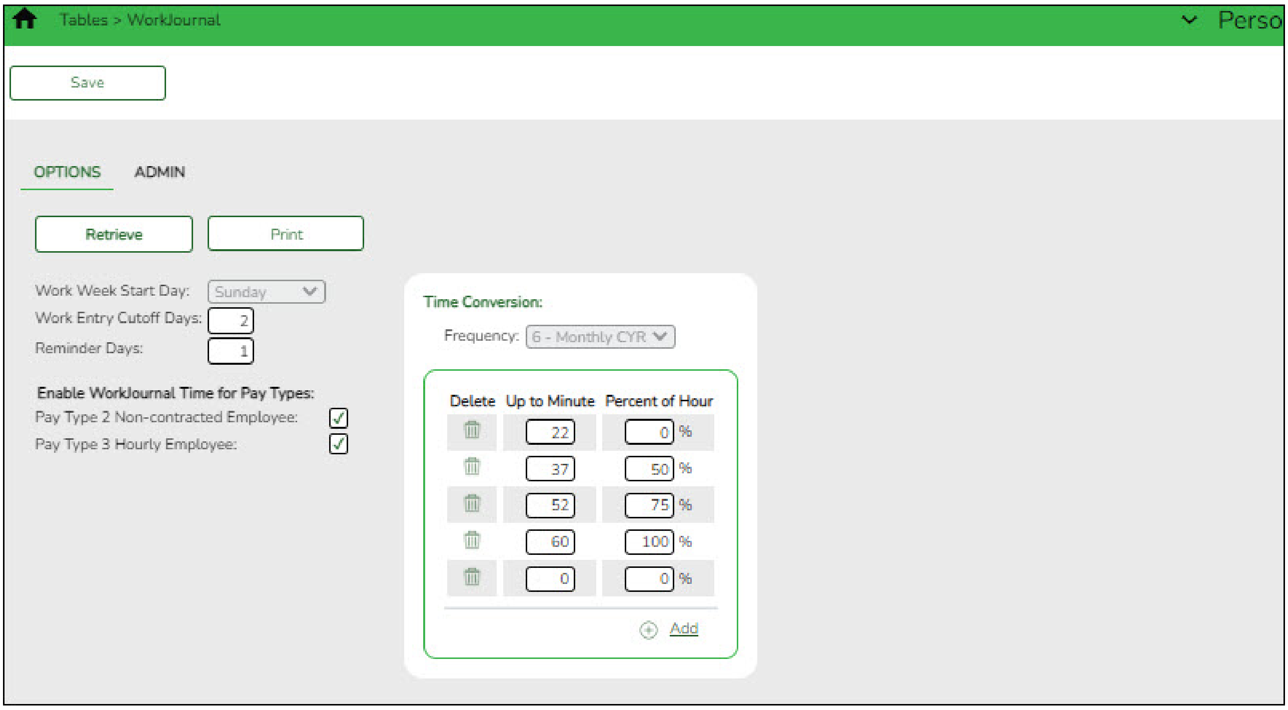
Set up Personnel Options

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.



Work Week Start Day: Sunday
Work Entry Cutoff Days: 2
Reminder Days: 1

Enable WorkJournal Time for Pay Types:
Pay Type 2 Non-contracted Employee: ☑
Pay Type 3 Hourly Employee: ☑

Time Conversion:
Frequency: 6 - Monthly CYR

Delete	Up to Minute	Percent of Hour
🗑	22	0 %
🗑	37	50 %
🗑	52	75 %
🗑	60	100 %
🗑	0	0 %

Field	Description
Work Week Start Day	Click ⌄ to select the beginning day of the work week. This day determines the day that the employee can select in the **Work Week Start Date** 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. • *Sunday* • *Monday* • *Tuesday* • *Wednesday* • *Thursday* • *Friday* • *Saturday* This day cannot be changed if there is at least one employee record in the employee WorkJournal time table.
Work Entry Cutoff Days	Type the number of cutoff days the employee has to enter a timesheet entry. Valid values are 0-30.
Reminder Days	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**:

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

❑ Under **Time Conversion**:

Frequency	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. This field is read only if your LEA only uses one pay frequency to pay employees. Pay frequencies are set up on the District Administration > Tables > District Information > Payroll Frequencies tab.

☐ Click **+Add** to add a row.

Up to Minute	Type the number of minutes to represent a specific percentage of the day. Valid values are 1-60.
Percent of Hour	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.

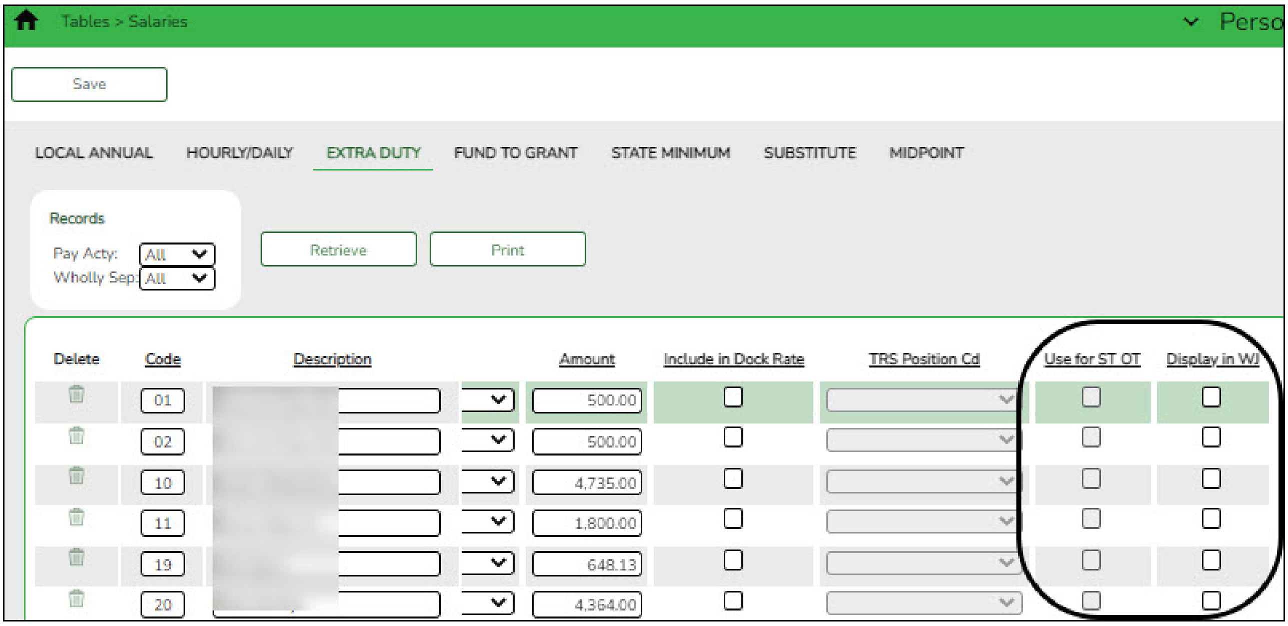
   Notes:

   - 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
Perso
Save
LOCAL ANNUAL
HOURLY/DAILY
EXTRA DUTY
FUND TO GRANT
STATE MINIMUM
SUBSTITUTE
MIDPOINT
Records
Retrieve
Print

Pay Acty: All
Wholly Sep: All

Delete	Code	Description	Amount	Include in Dock Rate	TRS Position Cd	Use for ST OT	Display in WJ
	01	[redacted]	500.00	☐		☐	☐
	02	[redacted]	500.00	☐		☐	☐
	10	[redacted]	4,735.00	☐		☐	☐
	11	[redacted]	1,800.00	☐		☐	☐
	19	[redacted]	648.13	☐		☐	☐
	20	[redacted]	4,364.00	☐		☐	☐

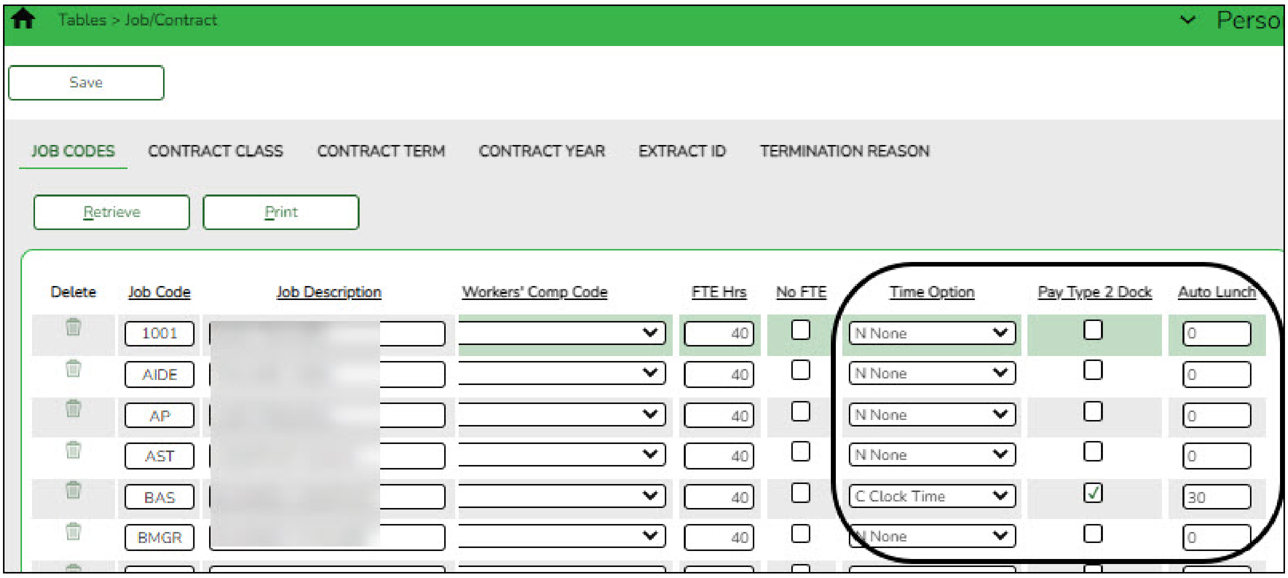
Use for ST OT	Select to indicate that the extra duty code will use the standard overtime rate in WorkJournal. This field is only enabled for S-type extra duty codes and can only be selected for one S-type extra duty code.
Display in WJ	Select to display the extra duty code in WorkJournal. This field 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
Perso
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	[redacted]		40	☐	N None	☐	0
	AIDE	[redacted]		40	☐	N None	☐	0
	AP	[redacted]		40	☐	N None	☐	0
	AST	[redacted]		40	☐	N None	☐	0
	BAS	[redacted]		40	☐	C Clock Time	☑	30
	BMGR	[redacted]		40	☐	None	☐	0

Time Option	Click ⌄ to select the time option to be used for WorkJournal in EmployeePortal. • *A Attendance Only* - Select to allow the job code to be used in WorkJournal for attendance purposes only. Pay information **will not** be transferred to Payroll when the Import WorkJournal Requests utility is processed. • *C Clock Time* - 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. • *N None* - Select to exclude the job code from WorkJournal. If selected, employees will not be able to submit entries to the job code in EmployeePortal. This field must be set to *A* or *C* to allow the job code to accept WorkJournal entries EmployeePortal.
Pay Type 2 Dock	Select to allow docks to be created for pay type 2 employees. For example, if this field is selected and a pay type 2 employee has 37 in the **Wkly Hrs Sched** field on the Payroll > Maintenance > Staff Job/Pay data > 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.
Auto Lunch	Indicate the amount of time (**in minutes**) 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.

❑ Click **Save**.

Verify Payroll Data

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.

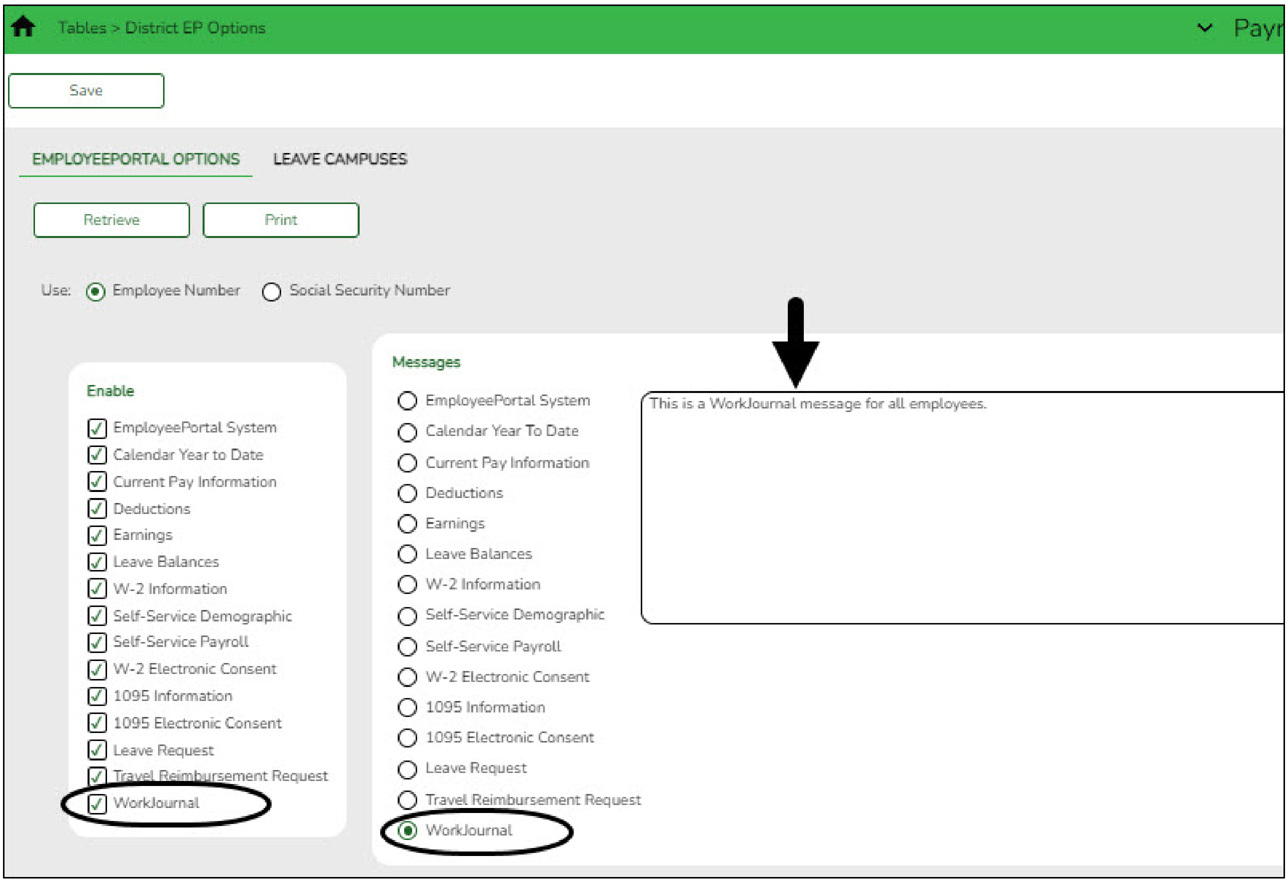
As mentioned previously, the **Time Option** for the employee's assigned job code must be set to A Attendance Only or C Clock Time on the Personnel > Tables > Job/Contract > Job Codes in order for the job code to be displayed in the **Job Code** field.

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.



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

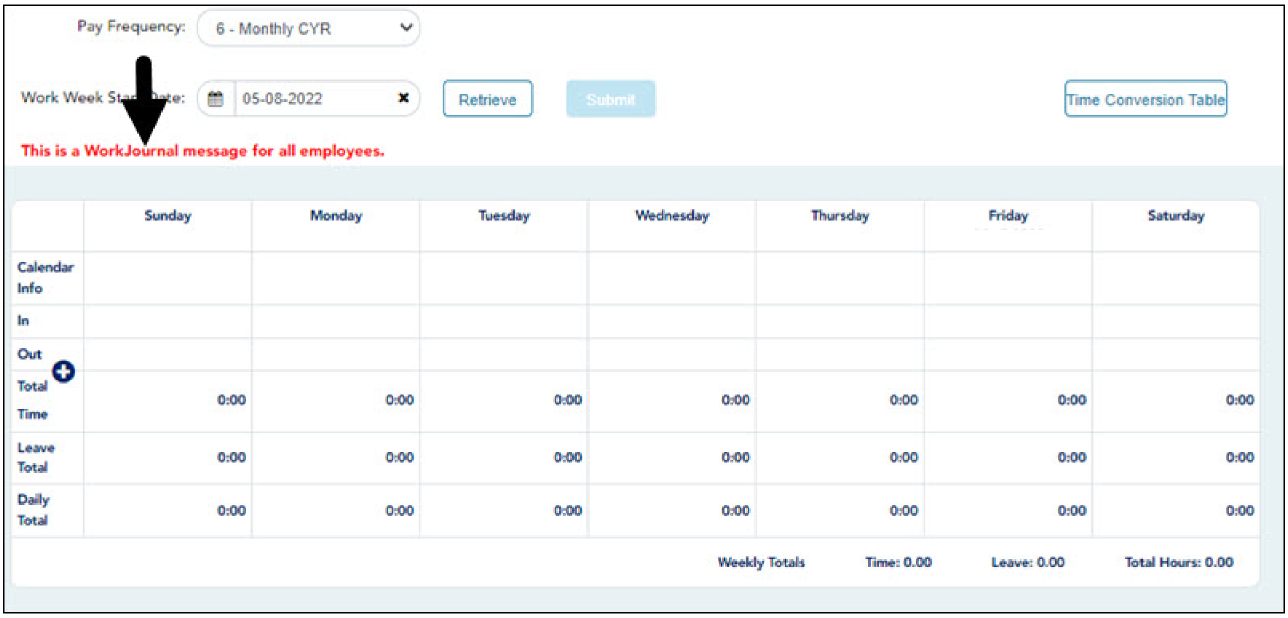
Messages
○ EmployeePortal System
○ Calendar Year To Date
○ Current Pay Information
○ Deductions
○ Earnings
○ Leave Balances
○ W-2 Information
○ Self-Service Demographic
○ Self-Service Payroll
○ W-2 Electronic Consent
○ 1095 Information
○ 1095 Electronic Consent
○ Leave Request
○ Travel Reimbursement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

   - Type the applicable message in the text box.
   - 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

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

Weekly Totals 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

After employees submit WorkJournal requests in EmployeePortal

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