



**TIMECARDS**

# EXEMPT TIMECARDS

## User Tutorial

**Instructional Support Services  
Texas Woman's University**

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# 1. Introduction to Phoenix Time

Phoenix Time & Labor is an enterprise-wide employee time/timecard collection and management product based on Oracle 11i. It is an intuitive, web-enabled, e-business timecard (timesheet) solution.

TWU Employees can submit timecards (timesheets) and review the approval status using a standard web browser. This feature will allow employees to enter their own work hours for a given period.

The Timecard Search window also allows you to check timecard status and details. It allows users to create a new timecard by copying one from a previous submission. Timecard approvers have these same capabilities.

Approvers can view summary information for their own or their subordinates' timecards. Users can then drill down to the following details for each timecard:

- Summary of hours by hours type
- Summary of hours by day, with daily totals and totals by expenditure type
- Summary of hours by project, task, and expenditure type
- Details for each item, including optional comment and additional information.

An advanced search is also available for refined selection criteria. For example, users can employ the advanced search for timecards with greater than a certain number of hours.

The approver can reject, approve or skip a timecard or group of timecards.

Approvers may also configure the approval process to be directed to one of the following:

- Manager/Supervisor
- Designated Person
- Immediate overriding approver

This process is tied to the roles and responsibilities designated in the user's login credentials. For questions regarding the Phoenix system, roles, responsibilities and security, please email: [phoenixtraining@mail.twu.edu](mailto:phoenixtraining@mail.twu.edu).

## 2. Accessing Phoenix

Users will need a Portal account to access the Phoenix system for timecards.

There are two methods used to access the Phoenix system

1. **Double Click** on the Phoenix icon on the desktop (Figure 1),
2. Using Internet Explorer **Navigate** to the URL: [oracle.twu.edu/prod](http://oracle.twu.edu/prod) ( Figure 2)



Figure 1



Figure 2

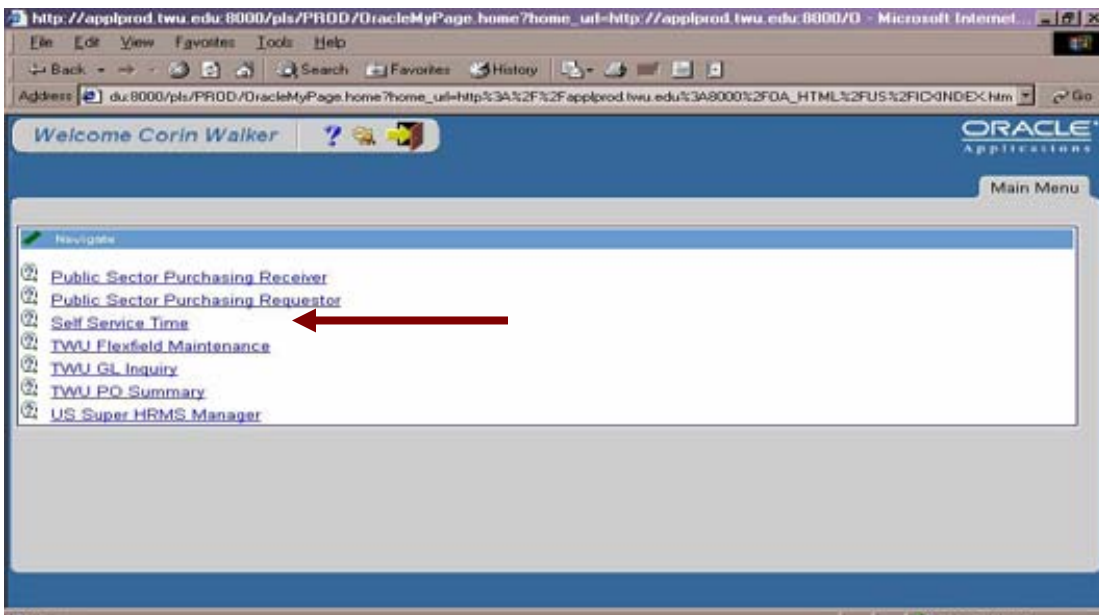
### 3. Logging In to Phoenix

1. Fill in Portal username and password and press **Enter** on the keyboard, or using the mouse/pointer **Click** on the connect button.

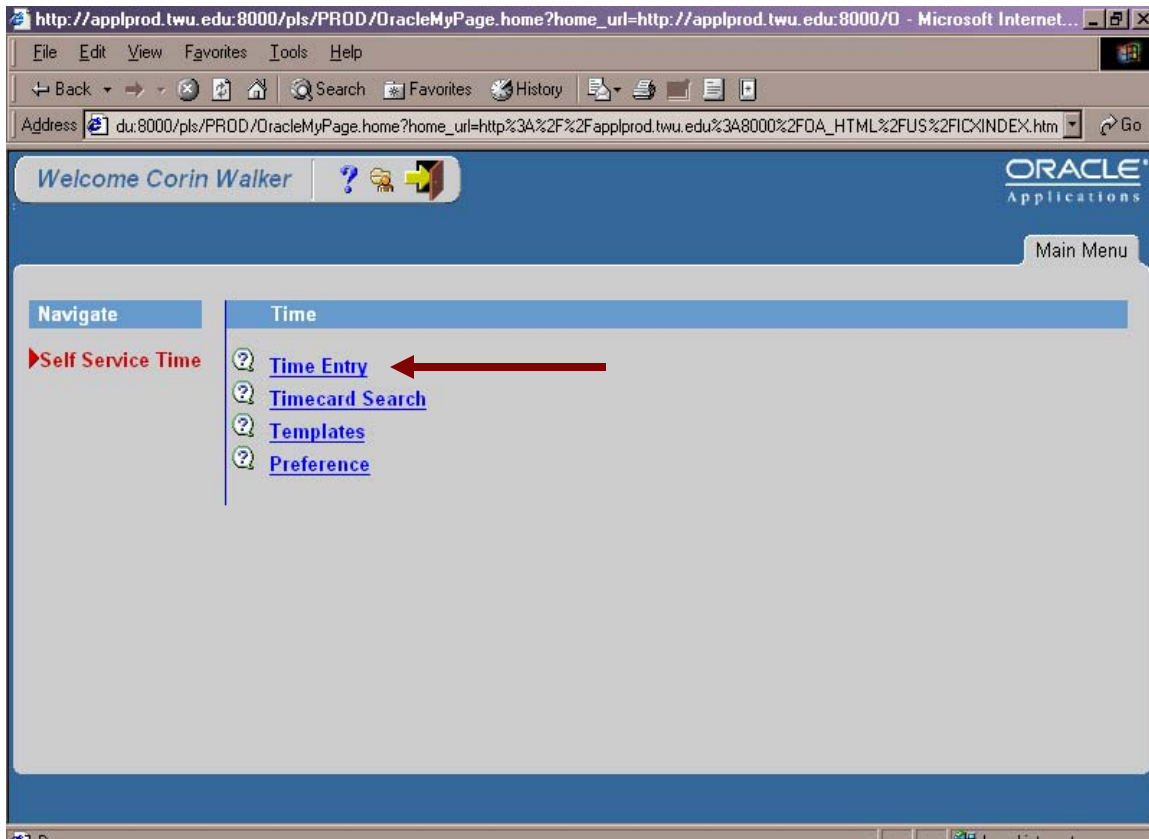


The main menu of Phoenix will appear. Each user's screen may look slightly different based on roles and responsibilities within the system.

2. **Click** on the Self Service Time link.



The next screen will display several options within the Self Service Time module of Phoenix. **Click** on the Time Entry link.

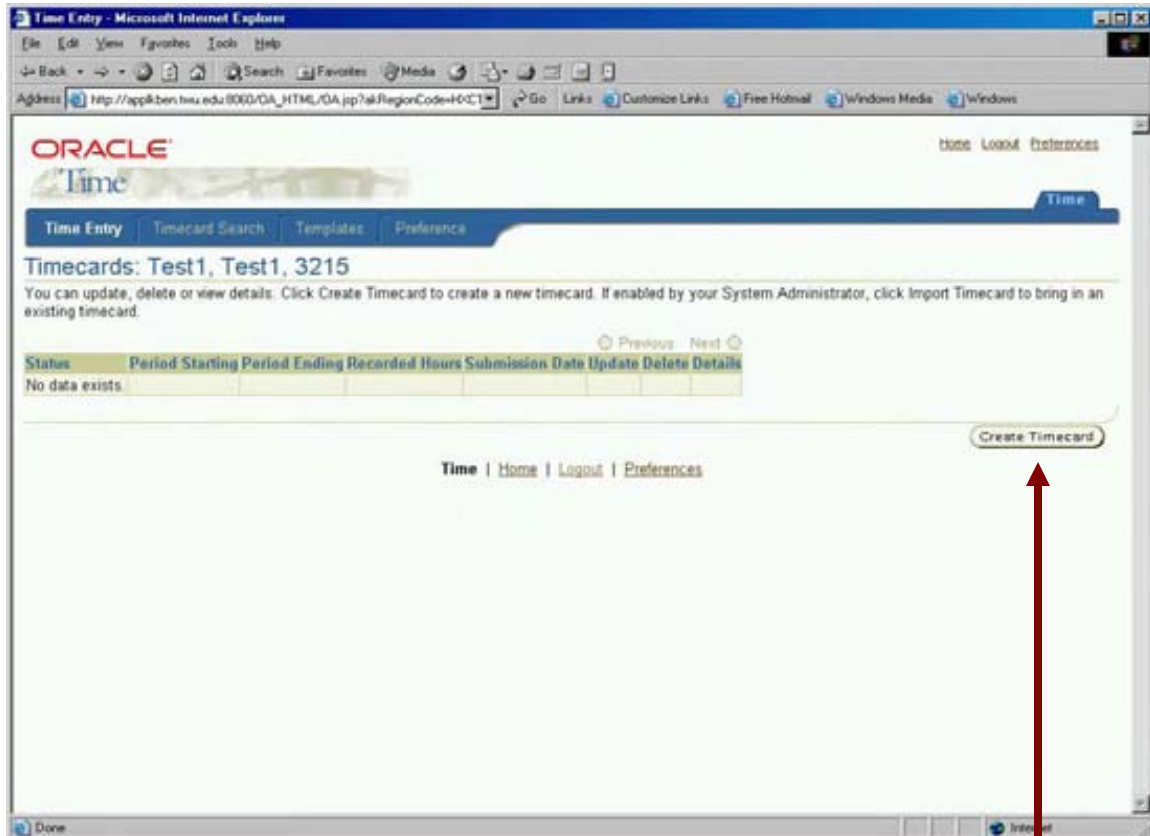


The Timecard maintenance window of Phoenix will now open.

## 4. Creating a New Timecard

**Click** on the Create Timecard link to begin entering time for the month.

If a timecard is already created for the month, **Click** in the Update field to make additions or changes to the Timecard for the appropriate period.



The Create Timecard link is located here. **Click** on the link one time using the mouse/pointer.

## 5. Entering and Editing Timecard data

The timecard will appear. Be sure to verify the dates in the box labeled Period are accurate. To choose a different time period, **Click** on the down arrow in the drop down box.

Hours Type	Mon, Dec 01	Tue, Dec 02	Wed, Dec 03	Thu, Dec 04	Fri, Dec 05	Sat, Dec 06	Sun, Dec 07	Mon, Dec 08

There will be 2 columns with drop down boxes.

The column on the left side will be labeled Hours Type (Vacation, Sick, etc.)

The column on the right side will only be used in conjunction with Sick Time Taken.


Hours Type	Mon, Dec 01	Tue, Dec 02	Wed, Dec 03	Thu, Dec 04	Fri, Dec 05	Sat, Dec 06	Sun, Dec 07	Mon, Dec 08

**Click** on the drop down arrow in the box under the column heading Hours Type. **Choose** the first type of hours needing to be entered.

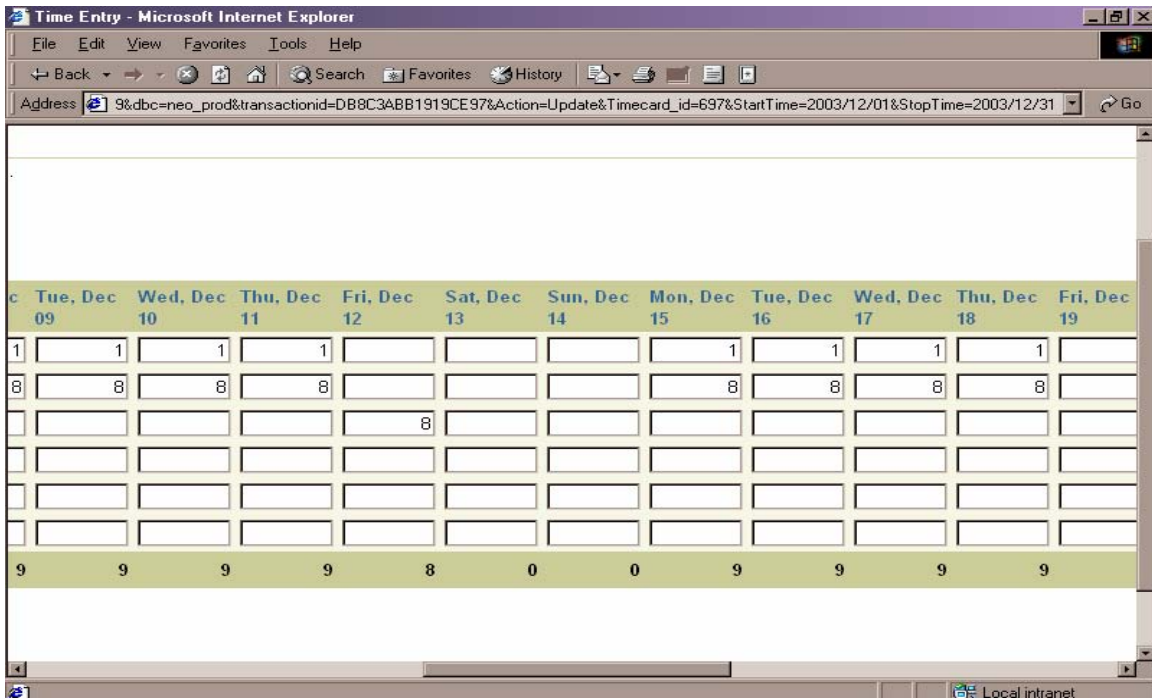
Ex: Vacation hours, Holiday hours or Sick hours

The days of the month are organized horizontally from left to right across the screen, **Enter** the total hours to be recorded under each date for the hours type selected for that line.

**Example:**



Hours Type		Mon, March 15	Tues, March 16	Wed, March 17
Vacation hours			2	
Holiday hours		8	6	
Sick hours	Z- None of the above			8



Hours can be entered in any order.

For each type of hours chosen, an additional row will need to be added.

**Example:**

Holiday Hours worked will be one row, Vacation Hours taken will be another row, and Sick Hours taken another row.

To add another row, **Click** on the Add Another Row button below the columns with the drop down boxes.

## \* Important Notes

- When entering data for each row listed under Hours Type, there is no pre-defined order to the rows or requirement as to which Hours Type must be entered first. Vacation hours may proceed Holiday hours and vice versa. Once the data is entered into the rows the order the rows are viewed in (top to bottom) may not remain listed in the exact order they were first entered. This is a normal function of Phoenix Timecards.

### Example:

Vacation Hours are entered in the first row. An additional row is then added, and Holiday Hours are entered into it. Upon reviewing or saving the Timecard, the rows previously entered have shifted order and appear Holiday Hours first and Vacation Hours second.

- If there are University holidays during a particular month, add a row for holiday hours taken. ***The system will not document Holidays in the timecard screen automatically.***
- The Calculate button can be used to add hours entered at any point. The system will automatically calculate the timecard when it is saved or reviewed.
- When choosing Sick Hours Taken under the Hours Type column, use the column on the right to choose the reason for taking sick leave. Sick leave is the only Hours Type that requires a reason code from the right column.

Timecard Information: Walker, Corin Ecker (Corin Walker), 579

Enter your time below for the selected timecard period. Click Save for Later to save without submitting your timecard. Click Review to r

Period: December 01, 2003 - Decem

Hours Type	Mon, Dec 01	Tue, Dec 02	Wed, Dec 03	Thu, Dec 04	Fri, Dec 05
Vacation Hrs Taken					
Holiday Hrs Taken					
Sick Hours Taken					

Buttons: Add Another Row, Calculate, Save For Later

At the end of each row will be a total of hours for that row

At the end of each row will be a delete button to delete that row.

Dec 23	Tue, Dec 24	Wed, Dec 25	Thu, Dec 26	Fri, Dec 27	Sat, Dec 28	Sun, Dec 29	Mon, Dec 30	Tue, Dec 31	Total Delete
									14 Delete
									112 Delete
									8 Delete
8	8	8	8	8			8	8	64 Delete
									0
									0
8	8	8	8	8	0	0	8	8	198

## 6. Saving, Reviewing, and Submitting Timecard data

### Saving:

To save entries made on a timecard that will be completed at a later date and to save entries made on a timecard before reviewing and/or submitting for approval, **Click** on the Save For Later button located just below the timecard data fields.

The screenshot shows the Oracle Time Entry interface in a Microsoft Internet Explorer browser. The address bar contains the URL: transactionid=D4607645D8F7F0FB&ResourceType=PERSON&retainAM=Y&Action=Create&StartTime=2003/12/01&StopTime=2003/12/31. The page title is "ORACLE Time". The main heading is "Timecard Information: Walker, Corin Ecker (Corin Walker), 579". Below this, there is a "Period" dropdown set to "December 01, 2003 - December 31, 2003" and a "Comments" text area. The main data area is a table with columns for "Hours Type" and days of the week: "Mon, Dec 01", "Tue, Dec 02", "Wed, Dec 03", "Thu, Dec 04", and "Fri, Dec 05". There are two rows of input fields for hours. Below the table are buttons for "Add Another Row" and "Calculate". At the bottom right, the "Save For Later" button is circled in red.

A message will display stating that the timecard has been successfully saved.

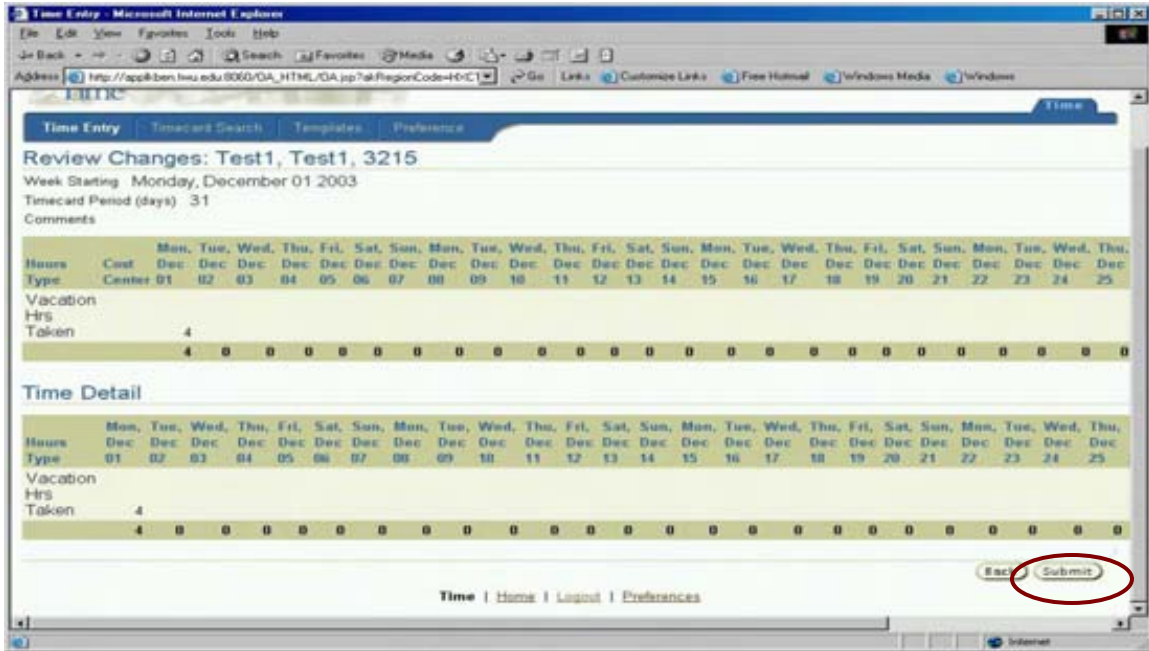
The screenshot shows the Oracle Time Entry interface after a successful save. A green message box at the top states "The timecard has been saved successfully". The main heading is "Timecard Information: Test1, Test1, 3215". The "Period" dropdown is set to "December 01, 2003 - December 31, 2003". The table now includes columns for "Mon, Dec 01" through "Sun, Dec 07" and "Mon, Dec 08". The first row is labeled "Vacation Hrs Taken" and has a value of "4" in the "Mon, Dec 01" column. Below the table are buttons for "Add Another Row" and "Calculate". At the bottom right, there are buttons for "Save For Later", "Cancel", and "Review".



## Submitting:

To Submit the timecard for approval, follow the review process in the prior step.

From the Review screen, **Click** on the Submit button below the timecard.

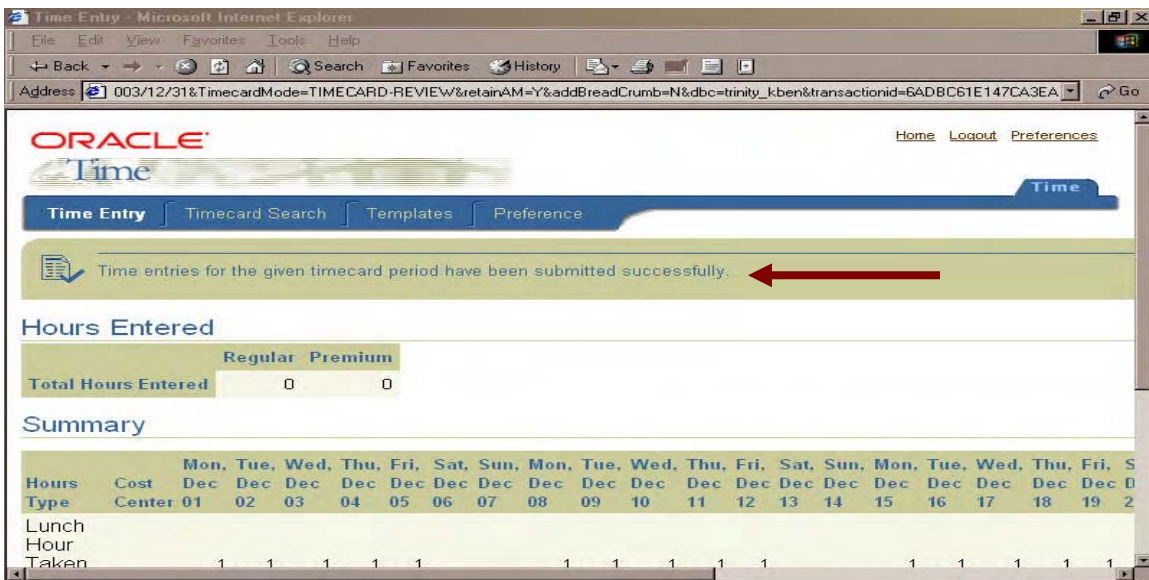


A message at the top of the Timecard will confirm that the Timecard was submitted successfully.

**\* Error messages may be seen if there are errors in data entry or Hours Type.**

Example: 25 hours entered under a single work date.

If an error occurs, correct the data entered and complete the Save, Review, Submit process again.



## 7. Logging Out

To logout of the system, always be sure to use the Logout option at the top or bottom of the screen.

The screenshot displays the 'Time Entry' web application. At the top, there is a navigation bar with links for 'Time Entry', 'Timecard Search', 'Templates', and 'Preference'. A message states 'The timecard has been saved successfully.' Below this, the 'Timecard Information' section shows 'Test1, Test1, 3215'. The user is prompted to enter time for the selected period, 'December 01, 2003 - December 31, 2003'. A table for 'Hours Type' is visible, with columns for days of the week (Mon, Dec 01 to Mon, Dec 08) and rows for 'Vacation Hrs Taken', 'Sick Hrs Taken', and 'Admin Hours Taken'. The 'Logout' link in the bottom navigation bar is circled in red.

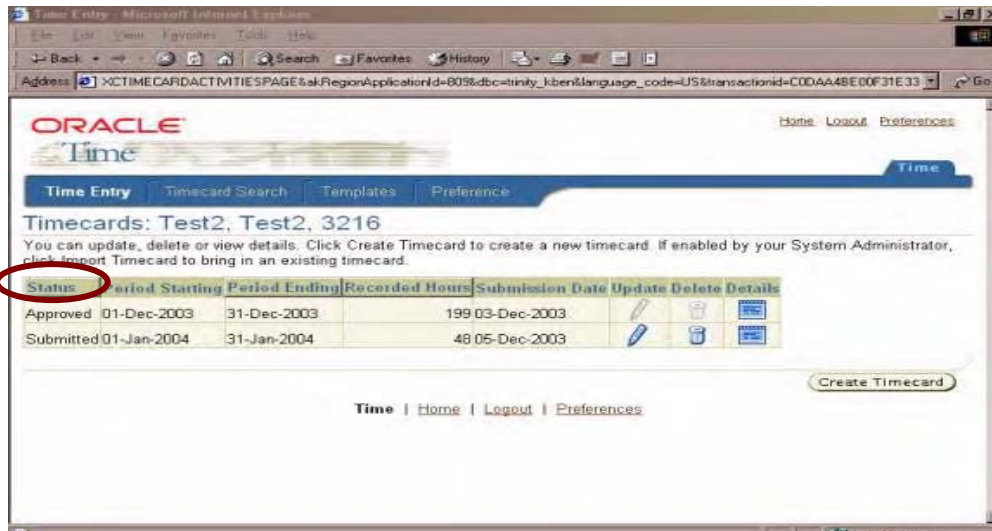
Hours Type	Mon, Dec 01	Tue, Dec 02	Wed, Dec 03	Thu, Dec 04	Fri, Dec 05	Sat, Dec 06	Sun, Dec 07	Mon, Dec 08
Vacation Hrs Taken	4							
Sick Hrs Taken	Z - None of the above	8						
Admin Hours Taken			2					
<b>Total</b>	<b>4</b>	<b>8</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**It is recommended that all browser windows be closed after logging out of Phoenix.**

## 8. Checking Timecard Status

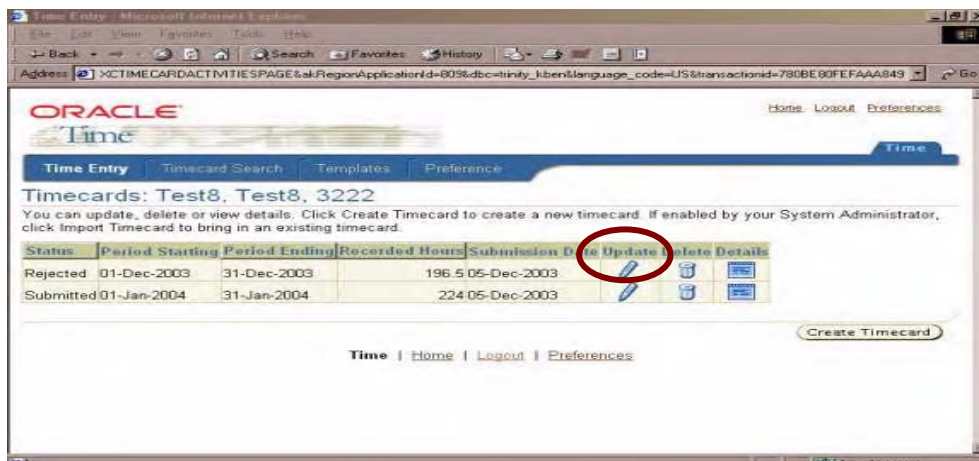
Access Phoenix Timecards following the instructions in section 2 of this document.

From the Main Time Entry Screen a list of timecards will be displayed. The Status Field will show the current status: Submitted (pending approval), Approved (the timecard process is complete) or Rejected (requiring new action) for each timecard in the menu.



Rejected timecards require new action to correct an error, inaccuracy, or omission.

**Click** on the pencil in the Update Field for the rejected timecard, to access the Timecard Edit screen.



Timecard information can be entered and edited following the instructions in Section 5 of this document.

After making the corrections and saving the timecard, review and submit the timecard following the instructions in Section 6 of this document.

## 9. Timecard Policy Information

Timecard policy information may be found in the New Staff Handbook or on the TWU website. If you need assistance retrieving this information, please contact your department supervisor or contact or the Payroll department.

## 10. Where to Get Help

Training Resources are available at the Instructional Support Services Training site

- <http://www.portal.twu.edu/iss-training>

Or by emailing:

- [trainer@mail.twu.edu](mailto:trainer@mail.twu.edu)

The Information Services Help Desk

- 940-898-3971
- [helpdesk@mail.twu.edu](mailto:helpdesk@mail.twu.edu)

Payroll

- [payroll@mail.twu.edu](mailto:payroll@mail.twu.edu)
- 940-898-3561