Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010

Human Resources Management Self Service Suite User's Guide

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Contents

Introduction

Welcome to the Human Resources Management (HRM) Self Service Suite.

The HRM Self Service Suite is a collection of applications that you can use to update your personal information, enter timecards, view paychecks, submit vacation requests, and perform other related tasks without the assistance of a human resources professional. These applications are accessible within Business Portal for Microsoft Dynamics® GP.

Check for updated instructions

This information was current as of March 13, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation Web site (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This introduction is divided into the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*
- *Documentation feedback*

What's in this manual

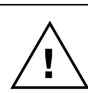
This manual will help you complete your tasks in the HRM Self Service Suite. It's divided into the following parts:

- Part 1, **Employee tasks**, explains how to update your personal information, enter timecards, request time off, view training opportunities, and complete other related tasks.

- Part 2, **Manager tasks**, describes concepts important to users who supervise other employees. It also explains tasks managers can complete, such as modifying an employee's pay rate or viewing how many vacation hours an employee has available.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or the back office might be affected.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
Create or modify a timecard	Italic type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as clicking items on a menu or a toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates the names of fields, tabs, menus, commands, and buttons, and text you should type.
TAB or ENTER	Small capital letters indicate a key or a key sequence.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal installation media.

Business Portal Installation Guide The Business Portal Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Business Portal Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide The Business Portal User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page, a Microsoft® Windows® SharePoint® Services page, or a Microsoft Office SharePoint Server 2007 page or Microsoft SharePoint Server 2010 page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you’re using Office SharePoint Server 2007 or Microsoft SharePoint Server 2010, additional help related to SharePoint Server features also will be available.

Documentation feedback

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

PART 1: EMPLOYEE TASKS

Part 1: Employee tasks

This information describes how you, in your role as an employee, can use the HRM Self Service Suite.

Keep in mind, the tasks and pages available to you will depend on which HRM applications are installed on your company's Business Portal server. For example, you can't use Business Portal to apply for open positions in the company if the Recruitment application is not installed.

The following information is included:

- Chapter 1, "How employees can use HRM," lists the documents you can create in HRM, and explains how to view document status information.
- Chapter 2, "Employee profile," helps you update personal information, including your dependent and emergency contact information.
- Chapter 3, "Pay," describes how to view paychecks, set up direct deposit accounts, and modify tax withholding information.
- Chapter 4, "Benefits," explains how to view employee- and employer-paid payroll benefit contributions.
- Chapter 5, "Skills and training," helps you update your education and test (certification) information, and view the skills and training information the company has on record for you.
- Chapter 6, "Time and attendance," explains how to enter timecards, request time off, and view timecard history.
- Chapter 7, "Vacation requests and Microsoft Office Outlook," describes how to create and save vacation requests in Microsoft Outlook®. The vacation requests will be sent automatically to Business Portal for your manager's approval.
- Chapter 8, "Careers," explains how to apply for open positions in the company.
- Chapter 9, "Organization structure," describes how to generate a Microsoft Office Visio® chart of your organizational structure.

Chapter 1: How employees can use HRM

As an employee, you can use the HRM Self Service Suite to update your personal information, enter timecards, view paychecks, submit vacation requests, and perform other tasks.

Each time you enter or update information in HRM, you create a *document*. The following information explains how to work with these documents.

This information is divided into the following sections:

Documents employees can create

The HRM Self Service Suite is a collection of applications, accessible within Business Portal. Using these applications, you can update your personal information, enter timecards, view paychecks, submit vacation requests, and complete other tasks.

Each time you enter, update, or delete information in HRM, you create a *document*. As an employee, you can create the following HRM documents.

Document name	**For more information, see**
Dependent Information	*Add a dependent record* on page 15
Emergency Contact Information	*Add an emergency contact record* on page 14
Employee Direct Deposit	*Set up your direct deposit accounts* on page 19
Employee Education	*Add your education information* on page 27
Employee Information (employee profile changes)	*Modify your personal and work information* on page 13
Employee Tax Information (W-4)	*Modify your tax withholding (W-4) information* on page 22
Employee Test Information	*Add your test information* on page 29
Employee Timecard	*Create or modify a timecard* on page 35
Employee Vacation Request	*Create a vacation request* on page 42
Timecard on Behalf of Employee (timecards submitted by managers and designated users)	*Create or modify a timecard* on page 35
Job Application	*Apply for a position* on page 51

Keep in mind that the documents you'll be able to create depend on which HRM applications your company installed.

Document approval

By default, the documents you create and submit in HRM must be approved. The following table lists the default approver for each document.

Document name	**Default approver**
Dependent Information	Human Resources administrator
Emergency Contact Information	Human Resources administrator
Employee Direct Deposit	Payroll administrator
Employee Education	Human Resources administrator
Employee Information (employee profile changes)	Payroll administrator
Employee Tax Information (W-4)	Payroll administrator
Employee Test Information	Human Resources administrator
Employee Timecard	Your manager (if you don't have a manager the document must be approved by the Payroll administrator)
Employee Vacation Request	Your manager (if you don't have a manager the document must be approved by the Payroll administrator)
Timecard on Behalf of Employee (timecards submitted by managers and designated users for another employee)	Payroll administrator
Job Application	No approval required

Working with documents

The following information describes some common situations you may encounter when working with HRM documents.

Submitting documents

When you submit a document, it is routed to the appropriate individual for approval. You can submit other documents, but you cannot submit another document for the same record until the first document you submitted is approved or rejected.

For example, suppose your emergency contact, Terry Adams, moved. You modify her address and submit the associated document. You then realize you forgot to update Terry's record with her new phone number. Since one document has been submitted, you cannot submit another document (to update her phone number) until the first one is approved or rejected.

However, if you need to add another emergency contact, you can, since that would be a new record.

Modifying documents you've submitted

If you submit a document, and realize you made an error and need to modify the document, you can:

- Ask the approver to reject the document. The document will then be reassigned to you, and you can modify it.
- Terminate the document by selecting **End** on the HR Documents - Submitted by Me page. You can then create and submit a new document. For more information, see *End, suspend, or resume a document* on page 10.

  You cannot terminate the document if it has already been approved.

Rejected documents

When a document you submitted is rejected, you can modify the document and resubmit it. For more information, see *Modify a rejected document* on page 10.

View the documents you've submitted

When you submit documents for approval, you can use the HR Documents - Submitted by Me page to monitor the documents' statuses. This page indicates who the document is currently assigned to, its status, and the date it was submitted for approval.

For more information about the HR Documents - Submitted by Me page, see *End, suspend, or resume a document* on page 10.

Use the following steps to view the documents you've submitted.

1. Go to the HR Documents - Submitted by Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Submitted by Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Submitted by Me** on the Quick Launch
2. Select a document. Detailed information about the document, including comments and history, is displayed on the right side of the page.
3. To limit the number of documents listed on the HR Documents - Submitted by Me page, click the heading at the top of your list of documents. Then choose whether you want to view:
   - Aborted business processes (documents that have been terminated)
   - Completed business processes (documents that have been approved)
   - Resumed business processes (documents that have been suspended and resumed)
   - Started business processes (documents that have been submitted, but not yet approved)
   - Suspended business processes (documents that have been suspended from the approval process)

Modify a rejected document

If a document you've submitted has been rejected, use the following steps to modify and resubmit it.

1. Go to the HR Documents - Assigned to Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Assigned to Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Assigned to Me** on the Quick Launch

2. Select the document you want to modify.

3. Click the **Details** tab, then click **View Document Detail** to open the document.

4. Modify the document, as needed.

5. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

6. Click **Resubmit**.

7. The HR Documents - Assigned to Me page is displayed. Select the check box next to your modified document. Then select **Resubmit** from the **Action** list.

8. Click **Apply Actions** to resubmit the document for approval.

End, suspend, or resume a document

You can use the HR Documents - Submitted by Me page to end, suspend, or resume documents that have not yet been approved.

End If you select **End**, the selected document's status changes to Aborted. This means the document has been permanently removed from the approval process.

Suspend If you click **Suspend**, the document's status changes to Suspended. The means the document has temporarily been removed from the approval process. If you later want the approval process to continue, you can click **Resume**.

Resume If you click **Resume**, the suspended document will be resubmitted for approval.

Use the following steps to end, suspend, or resume a document.

1. Go to the HR Documents - Submitted by Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Submitted by Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Submitted by Me** on the Quick Launch

2. Select the check box next to a document.

3. Select an action from the document’s **Action** list.
4. Click **Apply Actions**.

Chapter 2: Employee profile

You can use the Profile page, which is part of the HRM Self Service Suite's Employee Profile application, to view and manage your personal data, such as your name, address, and emergency contact information. Be sure to keep this information accurate because it is used in several places in the HRM Self Service Suite.

This information is divided into the following sections:

- *Modify your personal and work information*
- *Add an emergency contact record*
- *Modify an emergency contact record*
- *Delete an emergency contact record*
- *Add a dependent record*
- *Modify a dependent record*
- *Delete a dependent record*
- *View your position history*
- *View your job description*

Modify your personal and work information

You can modify your personal and work information, such as your name, address, home and work phone numbers, and marital status.

Be sure the information you enter is accurate because:

- Your personal information could affect your pay or benefits. For example, your marital status could affect the benefits available to you.

- Your work information is displayed in other areas of HRM. For example, the **Business Card** web part on the Directory page (in the Company Center site) displays your contact information.

Use the following steps to modify your personal and work information.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Personal** or **Work** tab.

3. Click **Modify**. The Modify Employee Profile page appears.

4. Update your profile information.

   You can't modify your Social Security number or start date using HRM. If your Social Security number or start date is incorrect, contact your Human Resources administrator.

5. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

6. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

7. Click **Submit** to forward the information to your Payroll administrator for approval.

Add an emergency contact record

Use the following steps to add your emergency contact information.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Emergency Contacts** tab.

3. Click **Add**. The Add Emergency Contact page appears.

4. Enter the emergency contact's name, address, and home and work phone numbers.

5. Specify the emergency contact's relationship to you.

6. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

7. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

8. Click **Submit** to forward the information to your Human Resources administrator for approval.

Modify an emergency contact record

Use the following steps to modify information about one of your emergency contacts.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Emergency Contacts** tab.

3. To modify information about an emergency contact, select the contact and click **Modify**. The Modify Emergency Contact page appears.

4. Modify the emergency contact's name, address, and home and work phone numbers, if necessary.

5. Modify the emergency contact's relationship to you, if necessary.

6. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

7. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

8. Click **Submit** to forward the information to your Human Resources administrator for approval.

Delete an emergency contact record

Use the following steps to delete an emergency contact record.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Emergency Contacts** tab.

3. Select an emergency contact, then click **Delete**.

4. The Delete Emergency Contact page appears. If this page contains a **Signature** field, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

5. Click **Submit**. Your request to delete the record will be submitted to your Human Resources administrator for approval.

Add a dependent record

A dependent is a person who relies on you for support, such as a child. Other dependents may include your spouse, parents, and siblings. Government regulations and company policies determine whom you can enroll as your dependents, so be sure to contact your Human Resources administrator if you have questions.

Use the following steps to add information about a dependent.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Dependents** tab.

3. Click **Add**. The Add Dependent page appears.

4. Enter the dependent's name.

5. Enter the dependent's Social Security number. If your dependent doesn't have a Social Security number, or you don't know what it is, you can leave this field blank. Be sure to update the record as soon as possible once you know the number.

6. Enter the dependent's address and contact information.

7. Specify the dependent's relationship to you.

8. Enter the dependent's gender, birth date, and age. Specify whether the dependent is a full-time student.

9. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

10. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

11. Click **Submit** to forward the information to your Human Resources administrator for approval.

Modify a dependent record

Use the following steps to modify information about one of your dependents.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Dependents** tab.

3. To modify information about a dependent, select the dependent and click **Modify**. The Modify Dependent page appears.

4. Modify the dependent's name, if necessary.

5. Modify the dependent's Social Security number, if necessary. If your dependent doesn't have a Social Security number, or you don't know what it is, you can leave this field blank. Be sure to update the record as soon as possible once you know the number.

6. Modify the dependent's address and contact information, if necessary.

7. Modify the dependent's relationship to you, if necessary.

8. Modify your dependent's gender, birth date, and age, if necessary. Specify whether the dependent is a full-time student.

9. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

10. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

11. Click **Submit** to forward the information to your Human Resources administrator for approval.

Delete a dependent record

Use the following steps to delete a dependent record.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Dependents** tab.

3. Select a dependent, then click **Delete**.

4. The Delete Dependent page appears. If this page contains a **Signature** field, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

5. Click **Submit**. Your request to delete the record will be submitted to your Human Resources administrator for approval.

View your position history

You can view summary information about each position you've held at your company. For example, for each position you've held, you can view the start date, title, and supervisor information. You cannot modify your position history information. If the information is incorrect, contact your manager or Human Resources administrator.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Position History** tab. Information about each position you've held is displayed.

View your job description

Use the following steps to view your job description. You cannot modify your job description. If the description is incorrect, contact your manager or Human Resources administrator.

1. Go to the Profile page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Profile** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Profile** on the Quick Launch

2. Click the **Job Description** tab. The description of your current job is displayed.

Chapter 3: Pay

You can use the Pay page, which is part of the HRM Self Service Suite's Employee Pay application, to view your paycheck, set up direct deposit accounts, and view and update your tax withholding (W-4) information.

This information is divided into the following sections:

- *View your paychecks*
- *Set up your direct deposit accounts*
- *Modify your direct deposit accounts*
- *Delete a direct deposit account*
- *View your tax withholding (W-4) history*
- *Modify your tax withholding (W-4) information*

View your paychecks

Use the following steps to view your paychecks.

1. Go to the Pay page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Pay** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Pay** on the Quick Launch

2. Click the **Paychecks** tab.

3. Select a paycheck. The pay and deduction amounts that were calculated as part of your pay will appear.

   - Examples of pay amounts include hourly wages, salaries, commissions, piecework, overtime, vacation, and sick time.

   - Examples of deductions include taxes, 401(k) contributions, and insurance costs.

4. To print the pay and deduction information, click **Print Paycheck**.

Set up your direct deposit accounts

Use the **Direct Deposit** tab on the Pay page to set up the accounts you want to use for direct deposit of your paychecks. For each account you set up for direct deposit, you'll need to enter the following information:

Bank routing number The bank routing number is the ID code for your bank. Usually, both the bank routing number and your account number are printed at the bottom of your personal checks. Be sure you enter the correct routing number.

Account number The account number is the ID code for your specific account at the bank.

Account type The account type indicates whether the account is a checking account or savings account.

Account status Direct deposit accounts can have one of three statuses: Active, Inactive, or Prenote. An active account is available for direct deposit distributions. An inactive account can't receive distributions. A prenote account has recently been set up but is not yet ready to receive distributions. The system will create bank prenotifications for this account to verify the account is set up correctly. This status is changed to Active after one or more successful prenotifications. You can't change your account status to or from Prenote.

Distribution information The distribution information you'll enter is the dollar amount or percentage of your paycheck that you want allocated to each account, and the account that you want the remainder of the paycheck deposited into after all allocations are made.

Use the following steps to set up your direct deposit accounts.

1. Go to the Pay page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Pay** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Pay** on the Quick Launch

2. Click the **Direct Deposit** tab.

3. Click **Add**.

4. Enter the routing and account numbers.

5. Select the account type from the list.

6. Enter the distribution information for the account. You can use either of the following options:

   Amount Enter the currency amount to be deposited into the account.

   Percentage Enter the percentage amount of your paycheck to be deposited into the account. If the entire paycheck amount should be deposited into the account, select this option and enter **100%**.

7. If you want this account to receive the remainder of the paycheck amount after all other distributions are made, select the **Remainder of Pay** option. You can assign the remainder to just one account.

8. Click **OK**.

9. Repeat steps 3 through 8 to continue adding accounts.

10. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

11. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

12. Click **Submit** to forward the request to the Payroll administrator for approval.

    Your new direct deposit accounts must be approved by the Payroll administrator before they can receive direct deposits. If prenotifications are required, the accounts will have a status of Prenote until they are eligible to receive direct deposits.

Modify your direct deposit accounts

You can change distribution allocations for each account listed on the **Direct Deposit** tab of the Pay page. You also can make accounts active or inactive. Accounts must be active to receive direct deposit distributions.

When modifying accounts, be sure that you designate an account to receive the remainder of the paycheck amount after all allocations have been distributed.

Use the following steps to modify your direct deposit accounts.

1. Go to the Pay page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Pay** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Pay** on the Quick Launch

2. Click the **Direct Deposit** tab.

3. Select the account you want to update and click **Modify**.

4. Make your changes, as necessary.

5. Click **OK**.

6. Repeat steps 3 through 5 to continue modifying accounts.

7. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

8. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

9. Click **Submit** to forward the information to your Payroll administrator for approval.

Delete a direct deposit account

Use the following steps to delete a direct deposit account.

*If the **Remainder of Pay** option is selected for the account you want to delete, you must first assign another account to receive the remainder of pay.*

1. Go to the Pay page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Pay** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Pay** on the Quick Launch

2. Click the **Direct Deposit** tab.

3. Select an account, then click **Delete**.

4. A message appears, asking you to confirm that you want to delete the direct deposit account. Click **Yes**.

5. If the page contains a **Signature** field, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

6. Click **Submit**. Your request to delete the direct deposit account will be submitted to your Payroll administrator for approval.

View your tax withholding (W-4) history

Use the **W-4 (Withholding)** tab of the Pay page to view your tax withholding change history. The changes you've made to your W-4 (using Business Portal) are displayed on the tab.

The W-4 history information you can view includes your tax filing status, number of allowances, any additional amounts you want withheld, and your exempt status.

For additional information, refer to *Modify your tax withholding (W-4) information* on page 22.

Modify your tax withholding (W-4) information

Use the **W-4 (Withholding)** tab on the Pay page to modify your tax withholding information. You can modify the following information:

Withholding Status This box indicates your tax filing status. You can choose **Married**, **Single**, or **Married but withhold at higher Single rate**.

Number of Allowances Allowances are a means of reducing the amount of taxes withheld from your paycheck. The more allowances you claim on your W-4, the less income tax will be withheld. You can claim zero or one allowance for yourself, and one for each qualifying member of your household.

Additional Amount You can choose to withhold money from your paycheck, beyond the taxes already withheld, by entering an additional amount to withhold. This is optional.

Exempt Status This box indicates whether you are exempt from paying income taxes for the specified year. To claim Exempt status, you must meet both conditions specified on the W-4 form.

Use the following steps to modify your tax withholding (W-4) information.

1. Go to the Pay page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Pay** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Pay** on the Quick Launch

2. Click the **W-4 (Withholding)** tab.

3. Click **Modify**. The W4 page appears.

4. Verify that your name and address are correct.

   If your last name differs from what is shown on your Social Security card, select the check box in area **4** of the form, and follow the directions listed.

5. Verify that your Social Security number is correct.

6. Indicate your tax filing status. You can choose **Married**, **Single**, or **Married but withhold at higher Single rate**.

7. Update your number of withholding allowances.

8. If you want an additional dollar amount withheld from your paycheck for taxes, enter an amount.

9. Review the information in area **7** of the form.

   - If you meet both conditions, you are exempt from paying taxes for the specified year. Select **Exempt** from the list.

   - If you are not exempt, select **Non-Exempt**.

10. In the **Signature** field, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

11. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

12. Click **Submit** to forward the change to your Payroll administrator for approval.

Chapter 4: Benefits

You can use the Benefits page, which is part of the HRM Self Service Suite's Employee Pay application, to view your payroll benefit contributions, and those made by your employer on your behalf.

This information is divided into the following sections:

- *View employee- and employer-paid benefit contributions*
- *How benefit contributions are calculated*

View employee- and employer-paid benefit contributions

To view your payroll benefit contributions, as well as those made by your employer on your behalf, complete the following steps.

1. Go to the Benefits page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Benefits** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Benefits** on the Quick Launch

2. The **Employee Contributions** web part lists the payroll contributions you make. The **Employer Contributions** web part lists the contributions your employer makes on your behalf.

   These web parts list each benefit's code, its description, how often you or your employer contribute to the benefit's plan, the contribution's calculation method, and the amount or percentage that has been contributed. For more information about the methods used to determine the amount or percentage contributed, see *How benefit contributions are calculated* on page 25.

How benefit contributions are calculated

The Benefits page lists employee- and employer-paid payroll benefit contributions. There are several ways of calculating benefit contributions. The following information describes each method.

Method	Description
Percent Of Gross Wages	The contribution amount is a percentage of your total wages before taxes are deducted.
Percent Of Net Wages	The contribution amount is a percentage of your wages after taxes have been deducted.
Percent Of Deduction	The contribution amount is a percentage of another deduction amount. For example, your contribution to your dependent's health insurance might be 50 percent of your own health plan contribution. Or, the employer contribution for your union membership might be 50 percent of your union deductions.
Fixed Amount	The contribution amount is a flat amount deducted from your pay, or a flat amount contributed by your employer.
Amount Per Unit	The contribution amount is calculated based on units that use piecework, hourly, or overtime pay. For example, you or your employer can contribute an amount for every 10 units you produce, or for every 24 hours of work.

Chapter 5: Skills and training

You can use the Skills and Training page and the Training page, which are part of the HRM Self Service Suite's Skills and Training application, to review the skills, training, education, and test and certification information on record for you, and to view company training opportunities.

This information is divided into the following sections:

Education information

You can review and update your education information on the **Education** tab of the Skills and Training page. Information displayed on this tab is entered by you or your manager (using Business Portal), or by a human resources professional (using Microsoft Dynamics GP).

Each record in your education information lists the school you attended, the major you studied, the type of degree you earned—such as Bachelor of Science (BS), Bachelor of Arts (BA), or Master of Science (MS)—and the year you received your degree. In addition, each record includes the grade point average (GPA) you earned and the GPA base—that is, the grade that is a perfect score in the school's grading system.

Add your education information

Use the following steps to add your education information.

1. Go to the Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Skills and Training** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Skills and Training** on the Quick Launch

2. Click the **Education** tab.

3. Click **Add**. The Create Education Information page appears.

4. Enter the name of the school you attended.

5. Enter the major you studied.

6. Enter the degree you earned.

7. Enter the year you received the degree.

8. Enter your grade point average.

9. In the **GPA Base** field, enter the number of a perfect score in the grading system the school used.

10. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

11. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

12. Click **Submit** to submit the information to your Human Resources administrator for approval.

Modifying your education information

Use the following steps to modify your education information.

1. Go to the Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Skills and Training** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Skills and Training** on the Quick Launch

2. Click the **Education** tab.

3. Select a record, then click **Modify.** The Modify Education Information page appears.

4. Make your changes, as necessary.

5. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

6. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

7. Click **Submit** to submit the information to your Human Resources administrator for approval.

Deleting your education information

Use the following steps to delete a record from your education information.

1. Go to the Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Skills and Training** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Skills and Training** on the Quick Launch

2. Click the **Education** tab.

3. Select a record, then click **Delete**.

4. The Delete Education Information page appears. If this page contains a **Signature** field, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

5. Click **Submit**. Your request to delete the record will be submitted to your Human Resources administrator for approval.

Test information

The **Tests** tab of the Skills and Training page lists the exams and certifications you've passed. The information displayed on this tab is entered by you or your manager (using Business Portal), or by a human resources professional (using Microsoft Dynamics GP). Each record in your test information includes the date you took the test or received the certification, and the score you received.

Add your test information

Use the following steps to add information about the tests and certifications you've passed.

1. Go to the Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Skills and Training** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Skills and Training** on the Quick Launch

2. Click the **Tests** tab.

3. Click **Add**. The Create Test Information page appears.

4. Select a test or certification from the **Test** list.

If you need a specific test or certification added to the list, contact your manager or Human Resources administrator.

5. Enter the score you received on the test.

6. Enter the date you took the test or received the certification.

7. Enter the expiration date of the test or certification.

8. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

9. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

10. Click **Submit** to submit the information to your Human Resources administrator for approval.

Modify your test information

Use the following steps to modify your test information.

1. Go to the Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Skills and Training** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Skills and Training** on the Quick Launch

2. Click the **Tests** tab.

3. Select a test or certification, then click **Modify**. The Modify Test Information page appears.

4. Make your changes, as necessary.

5. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

6. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

7. Click **Submit** to submit the information to your Human Resources administrator for approval.

Delete your test information

Use the following steps to delete a record from your test information.

1. Go to the Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Skills and Training** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Skills and Training** on the Quick Launch

2. Click the **Tests** tab.

3. Select a test or certification, then click **Delete**. The Delete Test Information page appears.

4. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

5. Click **Submit**. Your request to delete the record will be submitted to your Human Resources administrator for approval.

Skills information

A skill is an ability to proficiently perform selected tasks. To view your skill information, select the **Skills** tab on the Skills and Training page. Select a skill set from the **Skill Set** list. Skill sets are groupings of skills that share a similar function, such as management skills, which consist of interviewing, hiring, and supervising. The skills in the selected skill set and your progress in acquiring them will appear below the **Skill Set** list.

Each record in your skills information includes the skill title, a **Yes** or **No** to indicate whether the skill is required and whether you have obtained the skill, your skill proficiency rating, and the date the skill expires. For skills that don't expire, the expiration date is blank.

All of the skills information displayed on this tab was entered by your manager or the Human Resources administrator. If any of the information on this tab is incorrect, contact your manager or Human Resources administrator.

Training history

Review your company training history on the **Training History** tab of the Skills and Training page. All the training information displayed on this tab was entered by your Human Resources administrator.

Each record in your training history includes the code that identifies the training course, the name of the course, the code identifying the class (which is a component of the course), the name of the class, the date you finished the class, and a **Yes** or **No** to indicate whether you've finished the class.

Training opportunities

The Training page (on the Company Center site) displays basic information about the courses and classes available in your company.

Classes are individual training sessions on a subject. Several classes grouped together comprise a *course*, which is a series of classes that cover a similar subject area. For example, a series of classes on Microsoft Windows, Microsoft Office, and Microsoft SQL Server® could be grouped as a software skills course.

The classes currently available in your company are listed in the **Courses and Classes** web part. To view the details for a specific class, select the class. Detailed information about the class is displayed in the **Course and Class Details** web part.

Chapter 6: Time and attendance

You can use the Timecard Entry page, which is part of the HRM Self Service Suite's Time and Attendance application, to enter timecards, submit vacation requests, and view how much time off you have available.

This information is divided into the following sections:

Time page overview

Use the Timecard Entry page to complete the following tasks:

- Entering timecards
- Creating a timecard template
- Viewing previously approved timecards
- Viewing how much time off you have available
- Requesting time off

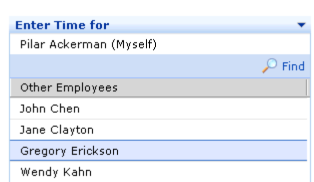
The following information explains key concepts you'll need to understand about the Timecard Entry page.

Who you can enter timecards for

You can use the **Timecards** tab to enter your own timecards, as well as timecards for other employees if your Payroll administrator or HRM Self Service administrator has given you permission. For example, if you're an administrative assistant, you may have been given permission to enter timecards for employees who are often away from the office, or for employees who don't have access to a computer.

If you've been given permission to enter timecards for other employees, the **Enter Time for** web part will be displayed on your Timecard Entry page, listing the employees you can enter timecards for. (If you don't have permission to enter timecards for other employees, the **Enter Time for** web part will not be displayed.)

*If you've been given permission to enter timecards for other employees, you'll see the **Enter Time for** web part on the Timecard Entry page.*



The timecard restrictions assigned to a particular employee still apply when you enter a timecard for that employee. For example, suppose you can enter time against the SALY, HOLI, and SICK pay codes. Your co-worker, Paul, can enter time against the HOUR, OVER, HOLI, and SICK pay codes. When you enter a timecard for Paul, you'll log his hours against the HOUR, OVER, HOLI, and SICK pay codes.

Timecard template

A timecard template is a reusable copy of a timecard that stores the time codes or pay codes, and the hours you normally enter on a timecard. When you create a new timecard from a template, all of the template information is automatically entered. You can then make changes to the timecard, as needed.

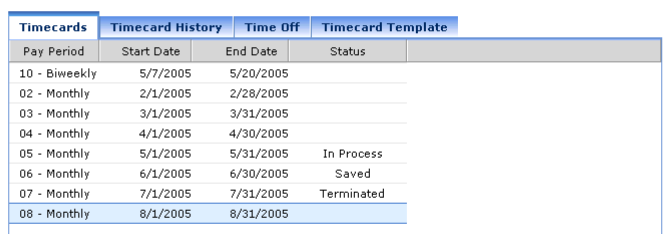
For more information, see *Create or modify a timecard template* on page 40.

Timecard status

The **Timecards** tab displays active pay periods, and indicates whether a timecard has been entered for each period.

- A blank status indicates that no timecard has been started.
- **Saved** indicates that the timecard has been started, but not yet submitted.
- **In Process** indicates that the timecard has been submitted, but not yet approved or rejected.
- **Terminated** indicates that the timecard is no longer in the workflow system. You must delete the timecard and create a new timecard for that pay period.

Approved timecards will not appear in the **Timecards** tab; they will appear on the **Timecard History** tab.



Pay Period	Start Date	End Date	Status
10 - Biweekly	5/7/2005	5/20/2005	
02 - Monthly	2/1/2005	2/28/2005	
03 - Monthly	3/1/2005	3/31/2005	
04 - Monthly	4/1/2005	4/30/2005	
05 - Monthly	5/1/2005	5/31/2005	In Process
06 - Monthly	6/1/2005	6/30/2005	Saved
07 - Monthly	7/1/2005	7/31/2005	Terminated
08 - Monthly	8/1/2005	8/31/2005	

You can also view timecard status information in other areas of Business Portal:

- To view the status of timecards you've submitted, go to the HR Documents - Submitted by Me page. For more information, see *View the documents you've submitted* on page 9.
- To view timecards that have been approved or terminated click the **Timecard History** tab on the Timecard Entry page.

Timecard history

Review past approved or terminated timecards on the **Timecard History** tab on the Timecard Entry page. This tab displays a list of pay periods and the timecard status (Approved or Terminated) for each pay period.

To view a timecard, select its pay period from the list, then click **View**. Keep in mind that you can't modify historical timecards.

Time off

To view how much time off you have available, click the **Time Off** tab. This tab displays the time off you have available.

You can also enter a vacation request from the **Time Off** tab. For more information, see *Create a vacation request* on page 42.

Create or modify a timecard

Use the following steps to create or modify a timecard.

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. If the **Enter Time for** web part is displayed on your page, select the person you're entering a timecard for (yourself, or another employee).

   If the **Enter Time for** web part is not be displayed on your page, you do not have permission to enter timecards for other employees.

3. Click the **Timecards** tab.

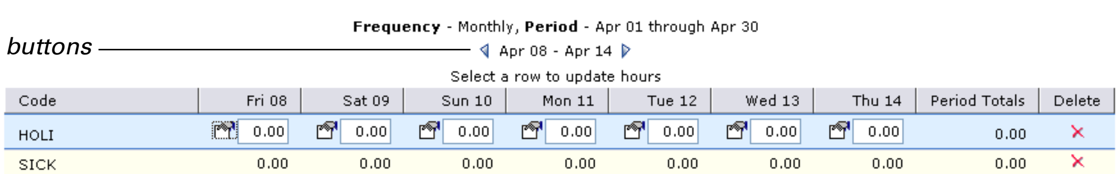
4. Select the pay period for which you want to enter a timecard. Click **Open**. The Timecard page appears. If you've created a timecard template, the information from the template will appear in the timecard.

5. The timecard displays the time codes or pay codes you can enter time against. Select the code you want to enter time against.

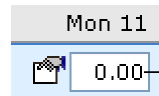
6. Determine which day you need to enter time for.

   The timecard grid displays one week of the pay period. If the pay period consists of multiple weeks, you'll need to use the browse buttons to view all the days in the pay period.

Browse buttons

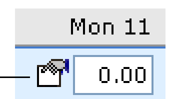


7. Click in the field of the day you want to enter hours for.



If the field is editable If the field becomes editable, enter your hours.

To add detailed information for a work day, click the **Details** icon next to the field. The Time Details page appears. See *Enter details about the hours you worked* on page 37 for more information about the page.



If the field is not editable If the field is not editable, click the **Details** icon next to it to enter time when you started and stopped work. The Time Details page appears. See *Enter details about the hours you worked* on page 37 for more information about the page.

8. Repeat steps 5 through 7 for each time code or pay code you want to enter time against.

9. To delete a row in the timecard, click the **Delete** icon in the row. Then confirm that you want to delete the row.

10. To print a summary of the timecard, click **Print Totals**. A printable version of the timecard appears. Click **Print** to print the timecard summary, then close the page.

11. The Timecard page is redisplayed. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

12. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

13. To save the timecard to work on later, click **Save**.

14. To submit the timecard for approval, click **Submit**. If you're entering your own timecard, it will be sent to your manager for approval. If you're entering a timecard for another employee, it will be sent to the Payroll administrator for approval.

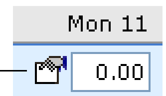
Enter details about the hours you worked

Depending on how your administrator set up the system, you may be required to enter detailed information about the hours you (or the person you're entering the timecard for) worked. For example, you may be required to enter the time you started and stopped working each day.

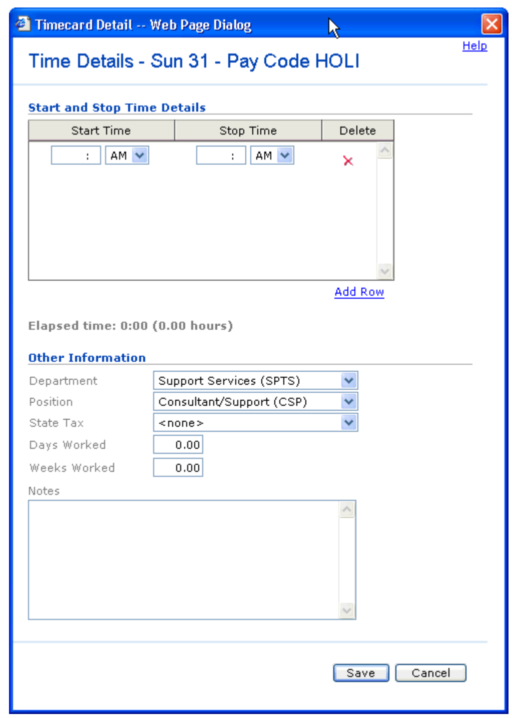
Use the following steps to enter details about the hours you worked.

1. Click the **Details** icon on the timecard.

*Click the **Details** icon to open the Time Details page.*



The Time Details page appears.



2. If the **Start and Stop Time Details** fields are displayed in your page, you must enter the time you (or the person you're entering the timecard for) started and stopped working for the day.

   How you enter your start and stop times depends on how your administrator set up the system.

   - If the **AM** and **PM** lists are available to you, use them to enter your start and stop times. For example, your start time might be 08:00 AM and your stop time might be 05:00 PM.

   - If the **AM** and **PM** lists are not displayed, enter your hours using 24-hour notation. For example, if you started work at 8:00 AM and ended work at 4:00 PM, you should enter 08:00 as the start time and 16:00 as the stop time.

3. Depending on how your administrator set up the system, you may also be able to enter information in the following fields:

   - Department
   - Position
   - State Tax
   - Local Tax
   - Days Worked
   - Weeks Worked
   - Notes

*If you're entering hours against a time code, the **Notes** field will be the only field available to you.*

4. Click **Save**. The Timecard page is redisplayed. Continue entering your timecard using the instructions in *Create or modify a timecard* on page 35.

Modify a rejected timecard

If a timecard you've submitted (for yourself or for another employee) has been rejected, use the following steps to modify and resubmit it.

1. Go to the HR Documents - Assigned to Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Assigned to Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Assigned to Me** on the Quick Launch

2. Select the timecard you want to modify.

3. Click the **Details** tab, then click **View Document Detail** to open the timecard.

4. Modify the timecard, as needed.

5. To print a summary of the timecard, click **Print Totals**. A printable version of the timecard appears. Click **Print** to print the timecard summary, then close the page.

6. The Timecard page is redisplayed. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

7. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

8. Click **Resubmit**.

9. The HR Documents - Assigned to Me page is displayed. Mark the check box next to your modified timecard. Then select **Resubmit** from the **Action** list.

10. Click **Apply Actions** to resubmit the timecard for approval.

Terminate a submitted timecard

To stop processing a timecard after it's been submitted for approval, you'll need to end the approval process for the timecard. This is called *terminating* a timecard.

You can terminate only the timecards you've submitted. For example, if your administrative assistant submitted a timecard for you, you won't be able to terminate it.

You cannot terminate a timecard that has already been approved.

If you terminate a timecard, you must then delete it before you can create a new timecard for the same pay period. For more information, see *Delete a timecard* on page 39.

Use the following steps to terminate a timecard.

1. Go to the HR Documents - Submitted by Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Submitted by Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Submitted by Me** on the Quick Launch

2. In the list, mark the check box for the timecard you want to terminate.

   You can view the timecard by clicking **View Document Detail** on the **Details** tab.

3. In the **Action** column, select **End**.

4. Click **Apply Actions**. Confirm that you want to end the processing of the timecard.

Delete a timecard

You can delete timecards that have been saved (and not yet submitted) and timecards that have been terminated. The following procedure explains how to do so.

For information about terminating a timecard, see Terminate a submitted timecard on page 39.

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. If the **Enter Time for** web part is displayed on your page, select whose timecard you want to delete (your timecard or another employee's timecard).

   If the **Enter Time for** web part is not displayed on your page, you do not have permission to delete timecards for other employees.

3. Click the **Timecards** tab.

4. Select the timecard you want to delete and click **Delete**. Confirm that you want to delete the timecard.

Create or modify a timecard template

A timecard template stores the time codes or pay codes, and the hours you normally enter on a timecard. When you create a timecard template, all new timecards that you create will have all of the template information entered automatically. You can then make changes to the timecards as needed.

You can create only one template, and you can modify it at any time. Any changes you make to an existing timecard template will apply only to new timecards created from the template. Timecards already created from the template won't be affected.

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. If the **Enter Time for** web part is displayed on your page, select who you will enter a timecard template for (yourself or another employee).

   If the **Enter Time for** web part is not displayed on your page, you do not have permission to enter timecard templates for other employees.

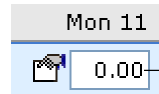
3. Click the **Timecard Template** tab.

4. Click **Create** to create a new template, or select the existing template and click **Modify**.

5. If you're creating a new timecard template, enter a name for the template.

6. The timecard displays the time codes or pay codes you can enter time against. Select the code you want to enter time against.

7. Click in the field of the day you want to enter hours for.

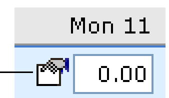


Click in this field.

If the field is editable If the field becomes editable, enter your hours.

To add detailed information for a work day, click the **Details** icon next to it. The Time Details page appears. See *Enter details about the hours you worked* on page 37 for more information about the page.

*Click the **Details** icon to open the **Time Details** page.*



If the field is not editable If the field is not editable, click the **Details** icon next to it to enter the start and stop time. The Time Details page appears. See *Enter details about the hours you worked* on page 37 for more information about the page.

8. Repeat steps 6 through 7 for each time code or pay code you want to enter time against.

9. To delete a row in the template, click the **Delete** icon in the row. Then confirm that you want to delete the row.

10. Click **Save** to save the template and close the page. All new timecards that you create will be based on the timecard template.

Delete a timecard template

You can delete a timecard template at any time. Deleting a template doesn't affect existing timecards that were based on the template.

Use the following steps to delete a timecard template.

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. If the **Enter Time for** web part is displayed on your page, select whose timecard template you want to delete (your template or another employee's template).

   If the **Enter Time for** web part is not displayed on your page, you do not have permission to delete templates for other employees.

3. Click the **Timecard Template** tab.

4. Select the template and click **Delete**. Confirm that you want to delete the template.

View timecard history information

You can review approved and terminated timecards on the **Timecard History** tab on the Timecard Entry page. This tab displays a list of pay periods and the timecard status (Approved or Terminated) for each pay period.

Historical timecards can't be modified.

You can delete timecards that have the Terminated status on the ***Timecards*** *tab of the Timecard Entry page. If you delete a terminated timecard, it will no longer appear on the* ***Timecard History*** *tab.*

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. If the **Enter Time for** web part is displayed on your page, select whose timecard history you want to view (yours, or another employee's).

   If the **Enter Time for** web part is not displayed on your page, you do not have permission to view timecard history information for other employees.

3. Click the **Timecard History** tab. To view a specific timecard, select it and click **View**.

Create a vacation request

Vacation requests are records that list the start and end dates of the time off you want to take. You submit these requests to your manager for approval. When your requests are approved, you can be notified by e-mail and—if you're using Vacation Requests for Microsoft Office Outlook—your calendar can be updated with a meeting request for the vacation time.

You cannot create and submit vacation requests for other people.

To view the time off you have available, and to submit a vacation request, use the following steps.

For information about creating vacation requests in Microsoft Office Outlook, refer to *Chapter 7, "Vacation requests and Microsoft Office Outlook."*

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. If the **Enter Time for** web part is displayed on your page, select your name.

3. Click the **Time Off** tab.

4. Click **Create**. The Vacation Request page appears.

5. Enter or select the date and time you want to begin your time off. Mark the **All Day** option if the request is for a full day or multiple days.

6. Enter or select the date and time your time off will end.

7. Enter a reason for taking the time off (optional).

8. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

9. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

10. Click **Submit** to forward the request to your manager for approval.

Terminate a submitted vacation request

If you don't want a vacation request that you've submitted to be processed, you can terminate it.

If your vacation request has already been approved, you can't terminate it. However, you can delete it. For more information, see *Delete a vacation request* on page 44.

1. Go to the HR Documents - Submitted by Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Submitted by Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Submitted by Me** on the Quick Launch

2. In the list, mark the check box for the vacation request you want to terminate. If you're not sure about the vacation request selected, you can view its information by clicking **View Document Detail** on the **Details** tab.

3. In the **Action** column, select **End**.

4. Click **Apply Actions**. Confirm that you want to end the processing of the vacation request.

   The terminated vacation request will be listed on the **Time Off** tab of the Timecard Entry page. (It will have the Terminated status.) You can delete the terminated vacation request by following the directions in *Delete a vacation request* on page 44.

Delete a vacation request

You can delete vacation requests that have been approved and those that have been terminated.

1. Go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

2. Click the **Time Off** tab.

3. Select the vacation request that you want to delete and click **Delete**. Confirm that you want to delete the vacation request.

Chapter 7: Vacation requests and Microsoft Office Outlook

Vacation Requests for Microsoft Office Outlook is an add-in program that integrates Time and Attendance with Microsoft Office Outlook 2007 and 2010. This add-in program enables you to create and save vacation requests in Outlook. The vacation requests will then be sent automatically to Business Portal for your manager's approval.

Before submitting vacation requests in Outlook, make sure Vacation Requests for Microsoft Office Outlook is installed on your computer.

This information is divided into the following sections:

Install the Outlook add-in

Use the following steps to install the Vacation Requests for Microsoft Office Outlook add-in.

1. Close Outlook before installing the Outlook add-in.

2. Open Business Portal and go to the Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **Timecard Entry** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **Timecard Entry** on the Quick Launch

3. Click the **Time Off** tab and click the link to get information about creating vacation requests in Outlook.

4. The Vacation Request for Microsoft Outlook Add-in page opens. Click the link to start the installation wizard.

5. The Welcome window appears. Click **Next**.

6. The License Agreement window appears. Read the terms and conditions, then select **I Agree**, and click **Next**.

7. The Select Installation Folder window appears. Specify the folder where you want the Outlook add-in files installed. The default folder is C:\Documents and Settings\<user>\Application Data\Microsoft\AddIns, where <user> is the logon name of the current user of the computer. Click **Next**.

8. The Confirm Installation window appears. Click **Next** to start the installation.

9. The Installation Complete window appears when the installation is complete. Click **Close** to exit the installation.

10. The Vacation Request for Microsoft Outlook Add-in page is redisplayed. Click **Close**.

Set up the Outlook add-in

When you install the Vacation Requests for Microsoft Office Outlook add-in, the Vacation Request Options window is added to Outlook. You'll use this window to set up the Vacation Requests for Microsoft Office Outlook add-in.

1. Start Outlook.

2. Open the Vacation Request Options window.
   Tools > **Vacation Request Options**

The first time you open this page, you may see an error message. Click OK to close the error and continue with this procedure.

3. Click the **Connection** tab.

4. In the **Host Name** field, enter the name of your Business Portal server. You can find the server name in the Internet Explorer® address bar when you are in Business Portal. For example, http://<ServerName>/sites/BusinessPortal is the address and <ServerName> is the name of the Business Portal server.

5. Select the security settings your Business Portal server uses:

   Standard (HTTP) Select this option if the URL that you enter to start Business Portal begins with *http* (for example: http://<ServerName>/sites/Business Portal).

   Secure (HTTPS) Select this option if the URL that you enter to start Business Portal begins with *https* (for example: https://<ServerName>/sites/Business Portal).

6. Click **Apply** to save changes without closing the window.

7. Click the **Preferences** tab.

8. From the **Default Company** list, select your company.

If you change your company, all of your existing vacation requests in the previous company will be deleted.

9. Specify when you want to synchronize Outlook with Business Portal. You can synchronize when you open your Outlook calendar, when you start Outlook, or both.

   If you don't select an option, you'll need to manually synchronize Outlook with Business Portal by selecting the **Synchronize** button on the toolbar of your Outlook calendar.

10. Click the **Profile** tab to view your name, employee ID, and vacation balance. The vacation balance is updated during each synchronization. Your vacation balance will decrease after the timecard on which you report vacation time is posted.

11. Click **Apply** to save changes. Click **OK** to close the window.

Outlook and Business Portal synchronization

To better understand how vacation requests are synchronized between Outlook and Business Portal, review the following information.

Creating vacation requests

Vacation requests that are created in Outlook are automatically sent to Business Portal for approval when you're working online. If you create vacation requests when you are working in Outlook offline, then you'll need to synchronize when you are online.

When you synchronize, all vacation requests will be sent to Business Portal for approval. In addition, any existing vacation requests will be updated in your Outlook calendar when your manager approves them in Business Portal.

Depending on the synchronization option you chose in the Vacation Request Options window, vacation requests that you create are synchronized every time you open your Outlook calendar, every time you start Outlook, or both. You can also manually synchronize vacation requests by clicking the **Synchronize** button located on the toolbar of your Outlook calendar.

If you change your company in the Outlook Vacation Request Options window, all of your existing vacation requests in the previous company will be deleted.

Deleting vacation requests

You must be working online and Business Portal must be available to delete a vacation request in Outlook. If you delete a vacation request when you are working offline or when Business Portal is not available, the vacation request will be removed from your Outlook calendar but not from Business Portal. The next time you synchronize with Business Portal, the deleted vacation request will reappear in your Outlook calendar.

Create a vacation request in Outlook

If you've set up the options in the Vacation Requests Options window, you can use Outlook to create new vacation requests. (For more information, see *Set up the Outlook add-in* on page 46.

Vacation requests created in Outlook do not require electronic signatures, even though signatures may be required on vacation requests created in Business Portal.

1. Choose **File** > **New** > **Vacation Request**.

   Vacation Request - <Your Name> will appear in the **Subject** line of the vacation request.

2. Select a start date from the **Start time** list and an end date from the **End time** list.

3. If you don't want to request the entire day off, unmark the **All day event** checkbox and select a start time and end time for the vacation request.

4. If you want to include comments with your vacation request, enter them in the space provided.

5. Click **Save and Close**.

   The vacation request will be saved in your Outlook calendar with the Tentative status. If you're working online and the Business Portal server is available, the vacation request will immediately be sent to Business Portal for approval. If you're working offline, or if Business Portal is not available, the vacation request will be sent to Business Portal for approval the next time you synchronize. For information about synchronization, see *Outlook and Business Portal synchronization* on page 47.

   Your manager will receive a task on his or her Business Portal HR Documents - Assigned to Me page. If your vacation request is approved, your Outlook calendar will automatically be updated the next time you synchronize, and your vacation request will have the Out of Office status.

   If your vacation request is rejected, your HR Documents - Submitted by Me page will show the vacation request as rejected. You can modify the vacation request and resubmit it. Or, you can delete the vacation request and submit a new one. For more information, see *Delete vacation requests in Outlook* on page 49.

View vacation requests in Outlook

Use the following steps to view your vacation requests in Outlook.

1. Open your Outlook calendar.

2. Click the **Synchronize** button to synchronize your calendar with Business Portal. This will ensure that all of your vacation requests are up to date.

3. Verify that your vacation requests have been recorded in your Outlook calendar.

   Vacation requests that have been approved will show you as being out of the office. Vacation requests that have not yet been approved will have a status of Tentative.

Delete vacation requests in Outlook

Use the following steps to delete a vacation request in Outlook.

You must be working online and Business Portal must be available to delete a vacation request in Outlook. If you delete a vacation request when you are working offline or when Business Portal is not available, the vacation request will be removed from your Outlook calendar but not from Business Portal. The next time you synchronize with Business Portal, the deleted vacation request will reappear in your Outlook calendar.

1. Open your Outlook calendar.
2. Click the **Synchronize** button to synchronize your calendar with Business Portal. This will ensure that all of your vacation requests are up to date.
3. From your Outlook calendar, right-click the vacation request that you want to delete. Select **Delete**.
4. A dialog box appears, asking you to confirm that you want to delete the vacation request. Click **Yes**. The vacation request will be removed from your Outlook calendar and from Business Portal.

Remove the Outlook add-in

Use the following steps to remove the Vacation Requests for Microsoft Office Outlook add-in from your computer.

1. Close Outlook before removing the Outlook add-in.
2. Open the **Add or Remove Programs** control panel.
3. Select **Vacation Requests for Microsoft Office Outlook Add-in**.
4. Click **Remove**.
5. A dialog box appears, asking you to confirm the removal of the Outlook add-in. Click **Yes** to remove it from your computer.

Chapter 8: Careers

You can use the Careers page, which is part of the HRM Self Service Suite's Recruitment application, to apply for open positions in the company and to track the status of your applications.

This information is divided into the following sections:

- *Apply for a position*
- *View the status of your application*
- *Modify your job application*
- *Delete your application*

Apply for a position

The Careers page lists open positions in your company. From here, you can create an application for an open position and to submit that application.

An application is viewable by the hiring manager after you submit it.

As an employee, you can apply for multiple positions, even if you have another application that has been assigned the status of *Hired*. You can also reapply for the same position after your previous application was rejected. You can submit, modify, or delete applications without the approval of a manager.

The policies of your organization may vary from those mentioned here. Always follow the application procedures of your organization when applying for a position.

1. Go to the Careers page.
   Point to **Business Portal** on the top link bar > click **Company Center** > click **Careers** on the Quick Launch
   -or-
   Click **Company** on the top link bar > click **Careers** on the Quick Launch

2. In the **Open Positions** web part, select a position, then click **Apply**. The Create Application page appears.

3. Update your phone numbers, if needed.

4. Enter comments (optional).

5. Click **Submit** to forward your application to the hiring manager.

View the status of your application

Use the following steps to view the status of an application you've submitted. Your application can have any of the following statuses: Active, Open, Rejected, Hired, or Other.

1. Go to the Careers page.
   Point to **Business Portal** on the top link bar > click **Company Center** > click **Careers** on the Quick Launch
   -or-
   Click **Company** on the top link bar > click **Careers** on the Quick Launch

2. In the **Open Positions** web part, select the position you applied for. The status of your application is displayed in the **My Applications** web part.

Modify your job application

Use the following steps to modify an application you've submitted.

1. Go to the Careers page.
   Point to **Business Portal** on the top link bar > click **Company Center** > click **Careers** on the Quick Launch
   -or-
   Click **Company** on the top link bar > click **Careers** on the Quick Launch

2. In the **Open Positions** web part, select the position you applied for. The status of your application is displayed in the **My Applications** web part.

3. In the **My Applications** web part, select your application and click **Open**.

4. Update information as needed.

5. Click **Resubmit** to forward your application to the hiring manager.

Delete your application

Use the following steps to delete an application you've submitted.

1. Go to the Careers page.
   Point to **Business Portal** on the top link bar > click **Company Center** > click **Careers** on the Quick Launch
   -or-
   Click **Company** on the top link bar > click **Careers** on the Quick Launch

2. In the **Open Positions** web part, select the position you applied for. The status of your application is displayed in the **My Applications** web part.

3. In the **My Applications** web part, select your application and click **Delete**.

4. A dialog box appears, asking you to confirm that you want to delete the application. Click **Yes**.

Chapter 9: Organization structure

The Organization Structure page is part of the HRM Self Service Suite's Employee Profile application. If you have Microsoft Office Visio 2007 or 2010 installed, you can use the Organization Structure page to generate a Visio chart of your organizational structure.

This information is divided into the following sections:

- *Specify the Business Portal site as a trusted site*
- *Generate an organizational chart*

Specify the Business Portal site as a trusted site

Before you can create a Visio chart of your company's organizational structure, you must specify that the Business Portal site is a trusted site. The following steps explain how to do so.

1. In Internet Explorer, select **Tools** > **Internet Options**. The Internet Options window appears.

2. Click the **Security** tab.

3. Select the **Trusted sites** icon and then click **Sites**. The Trusted Sites window appears.

4. Enter the web address of the Business Portal site.

   The web address is http://<ServerName>/sites/BusinessPortal, where <ServerName> is the name of the web server where Business Portal has been installed.

   If your administrator configured Business Portal to use Secure Sockets Layer (SSL), the URL is https://<ServerName>/sites/BusinessPortal.

5. Click **Add** to add the site to the list of trusted sites.

6. Click **Close** to close the Trusted Sites window.

7. Click **OK** to close the Internet Options window.

Generate an organizational chart

Use the following steps to generate a Visio chart of your organizational structure. You must have Microsoft Visio 2007 or 2010 installed on your computer to generate the chart.

1. Go to the Organization Structure page.
   Point to **Business Portal** on the top link bar > click **Company Center** > click **Organization Structure** on the Quick Launch
   -or-
   Click **Company** on the top link bar > click **Organization Structure** on the Quick Launch

2. Select a manager from the list.

3. In the **Organization Chart Options** web part, select the number of organizational levels you want to appear in the chart.

4. From the **Available Fields** list, select the fields you want to display in the chart and use the **Add** button to move them into the **Fields to Display** list.

   You can change the order of the fields by selecting a field in the **Fields to Display** list and clicking the **Move Up** or **Move Down** buttons.

5. Click **Create Chart**. Visio opens and displays the organizational chart.

Part 2: Manager tasks

This information describes the tasks that managers can complete using the HRM Self Service Suite.

Keep in mind that the tasks and pages available to you will depend on which HRM applications are installed on your company's Business Portal server. For example, you can't post a job opening if the Recruitment application is not installed.

The following information is included:

- Chapter 10, "How managers can use HRM," explains how to review documents (such as timecards) submitted by your employees.
- Chapter 11, "Team profile," explains how to view detailed information about the employees you supervise, such as their address, emergency contacts, and pay rates.
- Chapter 12, "Job history," describes how to view your employees' position and compensation history.
- Chapter 13, "Skills and training," helps you review and update the training, skills, and education information on record for the employees you supervise.
- Chapter 14, "Time and attendance," explains how to enter timecards for your employees and how to view their time off information.
- Chapter 15, "Timecard status," explains how to view timecard status information. It's important to do this before processing payroll checks, so you can ensure that all employees have submitted timecards.
- Chapter 16, "Timecard history," explains how Payroll administrators can view employees' approved and terminated timecards.
- Chapter 17, "Recruiting," helps you create job postings, review applications, and track job posting costs.

Chapter 10: How managers can use HRM

As a manager, you can use the HRM Self Service Suite to update your employees' personal information, such as their address, emergency contacts, and skills and education information. You'll also be responsible for approving their timecards and vacation requests.

Each time you enter or update information in HRM, you create a *document*. The following information explains how to work with these documents.

This information is divided into the following sections:

- *Documents managers can create*
- *Documents managers must approve*
- *View the documents assigned to you*
- *Approve or reject documents*

Documents managers can create

The HRM Self Service Suite is a collection of applications, accessible within Business Portal. As a manager, you can use these applications to enter your employees' timecards, update their skills and education information, and modify their pay rates. You can also post job openings.

Each time you enter, update, or delete information in HRM, you create a *document*. As a manager, you can create the following HRM documents.

Document name	**For more information, see**
Employee Education	*Add an employee's education information* on page 67
Employee Information (employee profile changes)	*Modify an employee's personal and work information* on page 61
Employee Pay Change	*Modify an employee's pay rate* on page 62
Employee Skills	*Modify an employee's skills information* on page 71
Employee Test Information	*Add an employee's test information* on page 69
Manager Requisition (job postings)	*Create or modify a job posting* on page 87
Timecard on Behalf of Employee (timecards submitted by managers and designated users)	*Create or modify an employee's timecard* on page 75

Keep in mind that the documents you'll be able to create depend on which HRM applications your company installed.

Documents managers must approve

By default, each document an employee creates and submits in HRM must be approved. As a manager, you're responsible for approving the following documents your employees submit:

- Timecards
- Vacation requests

For instructions on how to approve these documents, see *Approve or reject documents* on page 59.

View the documents assigned to you

Each task on the HR Documents - Assigned to Me page represents an HRM document that is assigned to you.

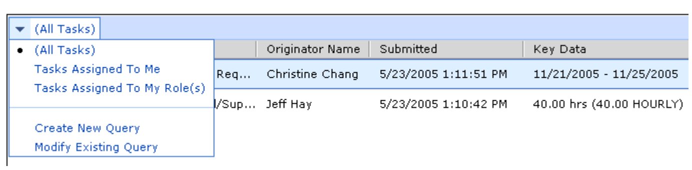
The HR Documents - Assigned to Me page displays the priority assigned to the document, the subject or title of the document, the name of the originator (the user who submitted the document for approval), and the date the document was submitted for approval.

Use the following steps to display the documents assigned to you.

1. Go to the HR Documents - Assigned to Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Assigned to Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Assigned to Me** on the Quick Launch

2. Select a document. Detailed information about the document, including comments and history, is displayed on the right side of the page.

3. To limit the number of documents listed on the page, click the heading at the top of your list of documents. Then choose whether you want to view the documents (tasks) assigned to you, the documents assigned to your role, or all documents assigned to you and your role.



Approve or reject documents

Use the following steps to approve, reject, add comments to, or modify the priority of documents assigned to you.

1. Go to the HR Documents - Assigned to Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Assigned to Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Assigned to Me** on the Quick Launch

2. Select the check box next to a document.

3. To add a comment to the selected document, click **Add Comment**. Enter your comment on the **Add Comment** page, and click **OK**.

4. To change the priority of the selected document, click **Modify Priority**. Select a new priority level on the Modify Priority page, and click **OK**.

5. To approve or reject the selected document, select **Approve** or **Reject** from the **Action** list. Click **Apply Actions**.

   When you approve a document, the document will be routed to the person assigned to the next level of approval, if required. When you reject a document, the document will be routed back to the person who submitted it.

   After you've approved or rejected a document, you can no longer add a comment to it or change its priority.

Chapter 11: Team profile

You can use the Team Profile page, which is part of the HRM Self Service Suite's Employee Profile application, to view your employees' profile information, pay rates, and emergency contacts.

This information is divided into the following sections:

- *Modify an employee's personal and work information*
- *Employee pay codes*
- *Modify an employee's pay rate*
- *View an employee's emergency contacts*

Modify an employee's personal and work information

You can use the **Employee Profile** tab on the Team Profile page to update an employee's address, personal information, and work-related information.

Employees can modify some of their profile information on the Profile page. However, only managers and Human Resources administrators can view and modify the following profile information:

HR status An employee's status can be active, on family leave, on leave of absence, on maternity leave, retired, separated from employment, suspended, terminated, or some other status designated by the company.

Work location Work location refers to the company's business address or the site where the employee works.

Use the following steps to modify an employee's personal and work information.

1. Go to the Team Profile page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Profile** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Profile** on the Quick Launch

2. From the **My Team** web part, select the employee whose profile information you want to modify.

3. Click the **Employee Profile** tab.

4. Click **Modify**.

5. On the Modify Employee Profile page, update the employee's information, as needed.

6. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

7. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

8. Click **Submit** to forward the information to your Payroll administrator for approval.

Employee pay codes

Use the **Employee Pay** tab on the Team Profile page to view the pay codes assigned to employees who report to you. Pay codes are used to identify the type and rate of pay. They determine the amount of pay an employee receives in a pay period.

Pay codes are set up in the Pay Code Setup window in Great Plains and are assigned to an employee in the Employee Pay Code Maintenance window of Payroll. Some examples of pay codes are:

- HOUR–Hourly
- SALY– Salary
- VACN–Vacation
- SICK–Sick time

The pay codes displayed on the **Employee Pay** tab include all codes assigned to an employee during the year, including codes used in calculating the employee's pay (active), and codes that are assigned to the employee but are not used in calculating pay (inactive).

Modify an employee's pay rate

You can use the **Employee Pay** tab of the Team Profile page to modify an employee's pay rate. You can modify an employee's pay rate at any time; your changes will take effect in Payroll according to the effective date you enter.

If you change the pay rate for a pay code that is used as the basis for calculating other pay codes, be aware that the pay rates for other pay codes are not automatically updated. For example, an hourly pay code might have an overtime pay code based on it. If you change the hourly pay code by using the ***Employee Pay*** *tab, the overtime pay code is not automatically updated. To make changes to a pay code and have the change also update the pay codes that are based on it, use Great Plains.*

Be aware that other records might be affected when you change the pay rate of a pay code. For example:

- Pay codes are used in calculating pay, taxes, benefits, and deductions.

- Some pay codes are used as the basis for calculating other pay codes. For example, the hourly pay code may be used in calculating the overtime pay code.

You can change the pay rate of an inactive pay code. If you want to use the pay code to calculate an employee's pay, the Payroll administrator must reactivate the pay code in Great Plains.

Although the ***Employee Pay*** *tab is part of the HRM Self Service Suite's Employee Profile application, you won't be able to modify pay rates unless you have the Employee Pay application installed, as well.*

Use the following steps to modify an employee's pay rate.

1. Go to the Team Profile page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Profile** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Profile** on the Quick Launch

2. Select an employee in the My Team web part and click the **Employee Pay** tab.

3. Select a pay code.

4. Click **Modify**. The Change Employee Pay page appears.

5. Enter the new pay rate and the date the rate takes effect.

6. Select the reason for changing the rate or enter it in the text box.

*The fields **New Pay Rate**, **Effective Date**, and **Select reason for change** are not available if you're entering an amount for tips (pay type Charged Tips or Reported Tips).*

7. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

8. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

9. Click **Submit** to forward the document to your Payroll administrator for approval.

View an employee's emergency contacts

Use the following steps to view an employee's emergency contacts and their phone numbers. An emergency contact is a person the company will notify in an emergency involving the employee.

You cannot edit the emergency contact information. Only employees can modify their emergency contact information.

1. Go to the Team Profile page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Profile** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Profile** on the Quick Launch

2. From the **My Team** web part, select the employee whose emergency contacts you want to view.

3. Click the **Emergency Contacts** tab. Emergency contact information for the selected employee appears.

Chapter 12: Job history

You can use the Team Job History page, which is part of the HRM Self Service Suite's Employee Profile application, to view your employees' job and compensation history.

This information is divided into the following sections:

- *View an employee's position history*
- *View an employee's performance review history*
- *View an employee's compensation history*

View an employee's position history

You can use the **Position History** web part on the Team Job History page to view all of the positions that have been held by a direct report. The **Position History** web part displays each of the employee's previous positions, the dates the employee held those positions, and the reasons for position changes.

1. Go to the Team Job History page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Job History** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Job History** on the Quick Launch

2. From the **My Team** web part, select the employee whose position history information you want to view. The **Position History** web part will display the selected employee's position history.

View an employee's performance review history

You can use the **Performance Review History** web part on the Team Job History page to view performance review information for your direct reports, including employees on probation.

1. Go to the Team Job History page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Job History** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Job History** on the Quick Launch

2. From the **My Team** web part, select the employee whose performance review information you want to view.

3. The **Performance Review History** web part displays the selected employee's performance review history. Select a performance review.

4. Click **View**. The Performance Review History Details page appears, displaying detailed information about the employee's performance review.

*If a review is composed of text rather than numerical scores, the **Review Rating** will be 0.*

View an employee's compensation history

You can use the **Compensation History** web part on the Team Job History page to view the pay codes assigned to an employee and the reasons the employee's pay rates were changed.

To modify an employee's pay rate, see *Modify an employee's pay rate on page 62.*

1. Go to the Team Job History page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Job History** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Job History** on the Quick Launch

2. From the **My Team** web part, select the employee whose compensation history you want to view. The **Compensation History** web part will display the compensation history for the selected employee.

Chapter 13: Skills and training

You can use the Team Skills and Training page, which is part of the HRM Self Service Suite's Skills and Training application, to review and update the education, tests, skills, and training history information on record for each of the employees reporting to you.

This information is divided into the following sections:

- *Employee education information*
- *Add an employee's education information*
- *Modify an employee's education information*
- *Delete an employee's education information*
- *Employee test information*
- *Add an employee's test information*
- *Modify an employee's test information*
- *Delete an employee's test information*
- *Employee skills information*
- *Modify an employee's skills information*
- *Employee training history*

Employee education information

You can review and update an employee's education information from the **Education** tab on the Team Skills and Training page.

Each line of an employee's education record includes the school attended, major studied, type of degree earned, and the year it was earned. In addition, the grade point average (GPA) and the GPA base (the grade that is a perfect score in the school's grading system) are also displayed.

Add an employee's education information

Use the following steps to add an employee's education information on the Team Skills and Training page.

Employees can add their own education information on the Skills and Training page for employees.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Education** tab.

4. Click **Add**. The Create Education Information page appears.

5. Enter the name of the school the employee attended.

6. Enter the employee's major.

7. Enter the degree the employee earned.

8. Enter the year the employee received the degree.

9. Enter the employee's grade point average.

10. Enter the perfect score in the grading system the school used.

11. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

12. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

13. Click **Submit** to submit the information to your Human Resources administrator for approval.

Modify an employee's education information

Use the following steps to modify an employee's education information on the Team Skills and Training page.

Employees can modify their own education information on the Skills and Training page for employees.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Education** tab.

4. Select a record, then click **Modify.** The Modify Education Information page appears.

5. Modify the information displayed, as needed.

6. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

7. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

8. Click **Submit** to submit the information to your Human Resources administrator for approval.

Delete an employee's education information

Use the following steps to delete an employee's education information on the Team Skills and Training page.

Employees can delete their own education information on the Skills and Training page for employees.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Education** tab.

4. Select a record, then click **Delete**. The Delete Education Information page appears.

5. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

6. Click **Submit**. Your request to delete the record will be submitted to your Human Resources administrator for approval.

Employee test information

The **Tests** tab on the Team Skills and Training page lists the exams and certifications employees have passed. Each record in an employee's test information includes the date the employee took the test or received the certification, and the score received.

Add an employee's test information

Use the following steps to add an employee's test information on the Team Skills and Training page.

Employees can add their own test information on the Skills and Training page for employees.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Tests** tab.

4. Click **Add**. The Create Test Information page appears.

5. Select a test or certification from the **Test** list.

If you need a specific test or certification added to the list, contact your Human Resources administrator.

6. Enter the score the employee received on the test.

7. Enter the date the employee took the test or received the certification.

8. Enter the date the test or certification expires.

9. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

10. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

11. Click **Submit** to submit the information to your Human Resources administrator for approval.

Modify an employee's test information

Use the following steps to modify an employee's test information on the Team Skills and Training page.

Employees can modify their own test information on the Skills and Training page for employees.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Tests** tab.

4. Select a test or certification.

5. Click **Modify**. The Modify Test Information page appears.

6. Modify the information displayed, as needed.

7. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

8. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

9. Click **Submit** to submit the information to your Human Resources administrator for approval.

Delete an employee's test information

Use the following steps to delete an employee's test information on the Team Skills and Training page.

Employees can delete their own test information on the Skills and Training page for employees.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Tests** tab.

4. Select the test or certification you want to delete, then click **Delete**. The Delete Test Information page appears.

5. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

6. Click **Submit**. Your request to delete the record will be submitted to your Human Resources administrator for approval.

Employee skills information

A skill is an ability to proficiently perform a task. To view skill information for an employee on the Team Skills and Training page, select a skill set (a grouping of skills that share a similar function) to display the skills in the skill set and your employee's progress in acquiring them.

Each record includes the skill title, an indication of whether the skill is required for the employee's position, an indication of whether the employee has obtained the skill, the employee's proficiency rating, and the date the skill expires. For skills that don't expire, the expiration date is blank.

Modify an employee's skills information

Use the following steps to modify an employee's skills information on the Team Skills and Training page.

Employees cannot modify their own skills information.

1. Go to the Team Skills and Training page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Skills and Training** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Skills and Training** on the Quick Launch

2. Select an employee from the **My Team** list.

3. Click the **Skills** tab.
4. Select a skill set from the list.
5. Select a skill. Click **Modify**. The Modify Skill Information page appears.
6. Indicate whether the employee has obtained the skill.
7. Enter the employee's proficiency rating for the selected skill.
8. Enter the skill's expiration date, if applicable. Leave the field blank if the skill doesn't expire.
9. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.
10. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.
11. Click **Submit** to submit the information to your Human Resources administrator for approval.

Employee training history

Review an employee's training history from the **Training History** tab of the Team Skills and Training page for managers.

Each record in an employee's training history includes the code that identifies the training course, the name of the course, the code identifying the class (which is a component of the course), the name of the class, the date that the employee finished the class, and a Yes or No to indicate whether the employee finished the class.

To modify the information on the **Training History** tab, contact your Human Resources administrator.

Chapter 14: Time and attendance

You can use the Team Timecard Entry page, which is part of the HRM Self Service Suite's Time and Attendance application, to enter timecards for your employees and view how much time off they have available.

This information is divided into the following sections:

- *Time page overview*
- *Create or modify an employee's timecard*
- *Enter details about the hours an employee worked*
- *Modify a rejected timecard*
- *Terminate a submitted timecard*
- *Delete an employee's timecard*
- *Create or modify an employee's timecard template*
- *Delete an employee's timecard template*
- *View an employee's timecard history information*
- *View an employee's time off summary*

Time page overview

Use the Team Timecard Entry page for completing the following tasks:

- Entering timecards for your employees
- Creating timecard templates for your employees
- Viewing your employees' previously approved timecards
- Viewing how much time off your employees have available

The following information explains key concepts you'll need to understand about the Team Timecard Entry page.

Who you can enter timecards for

You can use the **Timecards** tab to enter timecards for your direct reports. Depending on how Time and Attendance is set up, you may also have the ability to enter timecards for employees who report to your direct reports.

The employees you can enter timecards for are listed in the **My Team** web part.

You can enter timecards for these employees.

If you need to enter your own timecard, go to the Timecard Entry page. See <u>Create or modify a timecard</u> on page 35 for more information.

The timecard restrictions assigned to a particular employee still apply when you enter a timecard for that employee. For example, suppose you can enter time against the SALY, HOLI, and SICK pay codes. Your direct report, Paul, can enter time against the HOUR, OVER, HOLI, and SICK pay codes. When you enter a timecard for Paul, you'll log his hours against the HOUR, OVER, HOLI, and SICK pay codes.

Timecard template

A timecard template is a reusable copy of a timecard that stores the time codes or pay codes, and the hours normally entered on a timecard. When you create a new timecard from a template, all of the template information is automatically entered. You can then make changes to the timecard as needed.

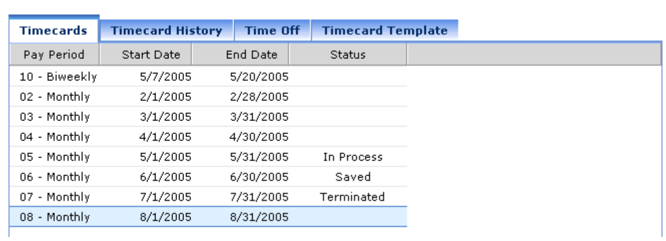
For more information, see *Create or modify an employee's timecard template* on page 80.

Timecard status

The **Timecards** tab displays active pay periods and indicates whether a timecard has been entered for each period.

- A blank status indicates that no timecard has been started.
- **Saved** indicates that a timecard has been started, but not yet submitted. You can open the timecard, make changes, and submit the timecard.
- **In Process** indicates that the timecard has been submitted, but not yet approved or rejected.
- **Terminated** indicates that the timecard is no longer in the workflow system. You (or your employee) must delete the timecard and create a new timecard for that pay period.

Approved timecards will not appear in the **Timecards** tab; they will appear on the **Timecard History** tab.



Pay Period	Start Date	End Date	Status
10 - Biweekly	5/7/2005	5/20/2005	
02 - Monthly	2/1/2005	2/28/2005	
03 - Monthly	3/1/2005	3/31/2005	
04 - Monthly	4/1/2005	4/30/2005	
05 - Monthly	5/1/2005	5/31/2005	In Process
06 - Monthly	6/1/2005	6/30/2005	Saved
07 - Monthly	7/1/2005	7/31/2005	Terminated
08 - Monthly	8/1/2005	8/31/2005	

The information on this tab is the same information your employee will see on his or her **Timecards** tab of the Timecard Entry page. For example, suppose you submit a timecard for your employee Sandra. You'll see that the timecard has the *In Process* status. Sandra will also see that the timecard has the *In Process* status when she views the **Timecards** tab on her Timecard Entry page.

You can also view timecard status information in other areas of Business Portal:

- To view the status of timecards you've submitted (either your own or for your employees), go to the HR Documents - Submitted by Me page. For more information, see *View the documents you've submitted* on page 9.

- To view timecards that have been approved or terminated, click the **Timecard History** tab on the Team Timecard Entry page.

Timecard history

Review past approved or terminated timecards from the **Timecard History** tab on the Team Timecard Entry page. This tab displays a list of pay periods and the timecard status (Approved or Terminated) for each pay period.

To view a timecard, select its pay period from the list, then click **View**. Keep in mind that you can't modify historical timecards.

Time off

Use the **Time Off Summary** tab on the Team Timecard Entry page to view how much time off your employees have available.

For more information, see *View an employee's time off summary* on page 82.

Create or modify an employee's timecard

Use the following steps to create a timecard for an employee. You can also use these steps to modify a timecard an employee has saved, but not yet submitted.

1. Go to the Team Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Timecard Entry** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Timecard Entry** on the Quick Launch

2. In the **My Team** web part, select who you will enter the timecard for.

3. Click the **Timecards** tab.

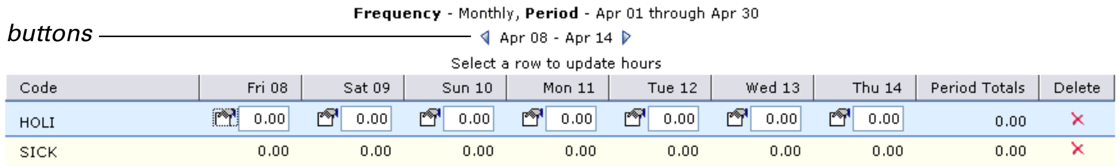
4. Select the pay period for which you want to enter a timecard. Click **Open**. The Timecard page appears. If you've created a timecard template, the information from the template will appear in the timecard.

5. The timecard displays the time codes or pay codes you can enter time against. Select the code you want to enter time against.

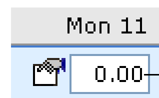
6. Determine which day you need to enter time for.

   The timecard grid always displays one week of the pay period. If the pay period consists of multiple weeks, you'll need to use the browse buttons to view all days in the pay period.

Browse buttons



7. Click in the field of the day you want to enter hours for.

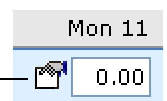


Click in this field.

   If the field is editable If the field becomes editable, enter your employee's hours.

   To add detailed information for a work day, click the **Details** icon next to the field. The Time Details page appears. See *Enter details about the hours an employee worked* on page 77 for more information about the page.

*Click the **Details** icon to open the Time Details page.*



   If the field is not editable If the field is not editable, click the **Details** icon next to it to enter the employee's start and stop times. The Time Details page appears. See *Enter details about the hours an employee worked* on page 77 for more information about the page.

8. Repeat steps 5 through 7 for each time code or pay code you want to enter time against.

9. To delete a row in the timecard, click the **Delete** icon in the row. Then confirm that you want to delete the row.

10. To print a summary of the timecard, click **Print Totals**. A printable version of the timecard appears. Click **Print** to print the timecard summary, then close the page.

11. The Timecard page is redisplayed. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

12. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

13. To save the timecard to work on later, click **Save**.

To submit the timecard for approval, click **Submit**. The timecard will be sent to the Payroll administrator for approval.

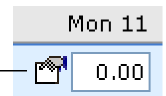
Enter details about the hours an employee worked

Depending on how your administrator set up Time and Attendance, you may be required to enter detailed information about the hours an employee worked. For example, you may be required to enter the time your employee started and stopped working each day.

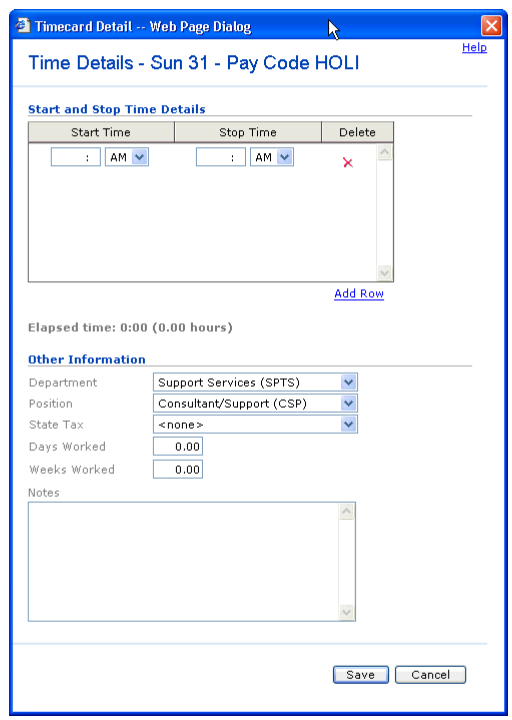
Use the following steps to enter details about the hours an employee worked.

1. Click the **Details** icon on the timecard.

*Click the **Details** icon to open the Time Details page.*



The Time Details page appears.



2. If the **Start and Stop Time Details** fields are displayed on your page, you must enter the time your employee started and stopped working for the day.

   How you enter the start and stop times depends on how your administrator set up Time and Attendance.

   - If the **AM** and **PM** lists are available to you, use them to enter the start and stop times. For example, the start time might be 08:00 AM and the stop time might be 05:00 PM.

   - If the **AM** and **PM** lists are not available, enter hours using 24-hour notation. For example, if your employee started work at 8:00 AM and ended work at 4:00 PM, you should enter 08:00 as the start time and 16:00 as the stop time.

3. Depending on how your administrator set up Time and Attendance, you may also be able to enter information in the following fields:

   - Department
   - Position
   - State Tax
   - Local Tax
   - Days Worked
   - Weeks Worked
   - Notes

*If you're entering hours against a time code, the **Notes** field will be the only field available to you.*

4. Click **Save**. The Timecard page is redisplayed. Continue entering the timecard using the instructions in *Create or modify an employee's timecard* on page 75.

Modify a rejected timecard

If a timecard you've submitted for one of your employees has been rejected, use the following steps to resubmit it.

1. Go to the HR Documents - Assigned to Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Assigned to Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Assigned to Me** on the Quick Launch

2. Select the timecard you want to modify.

3. Click the **Details** tab, then click **View Document Detail** to open the timecard.

4. Modify the timecard, as needed.

5. To print a summary of the timecard, click **Print Totals**. A printable version of the timecard appears. Click **Print** to print the timecard summary, then close the page.

6. The Timecard page is redisplayed. If there are any notes or comments you'd like to make, enter them in the **Additional Notes** field.

7. If a **Signature** field appears, enter your domain and logon ID as your electronic signature. Use the following format: domain\logon ID.

8. Click **Resubmit**.

9. The HR Documents - Assigned to Me page is displayed. Mark the check box next to your modified timecard. Then select **Resubmit** from the **Action** list.

10. Click **Apply Actions** to resubmit the timecard for approval.

Terminate a submitted timecard

To stop processing a timecard after it's been submitted for approval, you'll need to end the approval process for the timecard. This is called *terminating* a timecard.

You can terminate only the timecards you've submitted. For example, if the employee, Paul, submitted his own timecard, you won't be able to terminate it.

You cannot terminate a timecard that has already been approved.

If you terminate a timecard, you must then delete it before you can create a new timecard for the same pay period. For more information, see *Delete an employee's timecard* on page 79.

Use the following steps to terminate a submitted timecard.

1. Go to the HR Documents - Submitted by Me page.
   Point to **Business Portal** on the top link bar > click **Employee Center** > click **HR Documents - Submitted by Me** on the Quick Launch
   -or-
   Click **Employee** on the top link bar > click **HR Documents - Submitted by Me** on the Quick Launch

2. In the list, mark the check box for the timecard you want to terminate.

   You can view the timecard by clicking **View Document Detail** on the **Details** tab.

3. In the **Action** column, select **End**.

4. Click **Apply Actions**. Confirm that you want to end the processing of the timecard for approval.

Delete an employee's timecard

You can delete timecards that have been saved (and not yet submitted), and timecards that have been terminated. The following procedure explains how to do so.

For information about terminating a timecard, see *Terminate a submitted timecard on page 79.*

1. Go to the Team Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Timecard Entry** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Timecard Entry** on the Quick Launch

2. In the **My Team** web part, select the employee whose timecard you want to delete.

3. Click the **Timecards** tab.

4. Select the timecard you want to delete and click **Delete**. Confirm that you want to delete the timecard.

Create or modify an employee's timecard template

A timecard template stores the time codes or pay codes, and the hours normally entered on a timecard. When you create a timecard template for an employee, all new timecards for that employee will open with all of the template information entered. You can then make changes to the timecards as needed.

To create or modify a timecard template for an employee, complete the following procedure. You can create only one template for each employee.

You can modify a timecard template at any time. Any changes you make to an existing timecard template will apply only to new timecards created from the template. Timecards already created from the template won't be affected.

1. Go to the Team Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Timecard Entry** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Timecard Entry** on the Quick Launch

2. In the **My Team** web part, select who you will create the timecard template for.

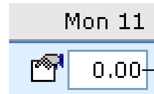
3. Click the **Timecard Template** tab.

4. Click **Create** to create a new template, or select the existing template and click **Modify**.

5. If you're creating a new timecard template, enter a name for the template.

6. The timecard displays the time codes or pay codes you can enter time against. Select the code you want to enter time against.

7. Click in the field of the day you want to enter hours for.

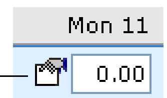


Click in this field.

If the field is editable If the field becomes editable, enter your employee's hours.

To add detailed information for a work day, click the **Details** icon next to the field. The Time Details page appears. See *Enter details about the hours an employee worked* on page 77 for more information about the page.

*Click the **Details** icon to open the Time Details page.*



If the field is not editable If the field is not editable, click the **Details** icon next to it to enter the employee's start and stop time. The Time Details page appears. See *Enter details about the hours an employee worked* on page 77 for more information about the page.

8. Repeat steps 6 through 7 for each time code or pay code you want to enter time against.

9. To delete a row in the template, click the **Delete** icon in the row. Then confirm that you want to delete the row.

10. Click **Save** to save the template and close the page. All new timecards will be based on the timecard template.

Delete an employee's timecard template

You can delete a timecard template at any time. Deleting a template doesn't affect existing timecards that were based on the template.

1. Go to the Team Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Timecard Entry** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Timecard Entry** on the Quick Launch

2. In the **My Team** web part, select the employee whose timecard template you want to delete.

3. Click the **Timecard Template** tab.

4. Select the template and click **Delete**. Confirm that you want to delete the template.

View an employee's timecard history information

You can review an employee's approved and terminated timecards on the **Timecard History** tab on the Team Timecard Entry page. This tab displays a list of pay periods and the timecard status (Approved or Terminated) for each pay period.

Keep in mind that historical timecards can't be modified.

*Timecards that have the Terminated status can be deleted on the **Timecards** tab of the Team Timecard Entry page. Terminated timecards that have been deleted will no longer appear on the **Timecard History** tab.*

1. Go to the Team Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Timecard Entry** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Timecard Entry** on the Quick Launch

2. From the **My Team** web part, select the employee whose timecard history you want to view.

3. Click the **Timecard History** tab. The selected employee's approved and terminated timecards are listed. To view a specific timecard, select it and click **View**.

View an employee's time off summary

Use the following steps to view how much time off an employee has available.

1. Go to the Team Timecard Entry page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Team Timecard Entry** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Team Timecard Entry** on the Quick Launch

2. From the **My Team** web part, select the employee whose time off summary you want to view.

3. Click the **Time Off Summary** tab. The employee's time off information is displayed.

Chapter 15: Timecard status

Before processing payroll checks, it's important to know whether all employees have submitted their timecards. The Timecard Status page helps you do this—it displays a list of employees and indicates who has submitted a timecard and who hasn't. It also indicates whether an employee's timecard needs to be approved.

The Timecard Status page is part of the HRM Self Service Suite's Time and Attendance application.

This information is divided into the following sections:

- *View timecard status*
- *Export timecard status information to Microsoft Office Excel*

View timecard status

You can use the Timecard Status page to find out which employees have submitted timecards for a specific pay period, and which have not. This page also indicates whether those timecards have been approved.

1. Go to the Timecard Status page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Timecard Status** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Timecard Status** on the Quick Launch

2. In the **Pay Periods** web part, select a pay period.

3. The **Employee Timecard Status** web part displays a list of employees who are assigned to the selected pay period. Review the information in the **Status** column to determine who has submitted timecards and who hasn't:

   Approved Indicates that the employee has submitted a timecard and it has been approved.

   In Process Indicates that the employee has submitted a timecard but the timecard has not yet been approved.

   Missing Indicates that the employee has not yet submitted a timecard. Contact the employee (or the employee's manager) and remind him or her that a timecard must be submitted.

4. To print the information displayed in the **Employee Timecard Status** web part, click **Print**.

   We recommend you print the information using the landscape orientation.

Export timecard status information to Microsoft Office Excel

Use the following steps to export the information that is displayed on the Timecard Status page to Microsoft Office Excel®.

To export information to Excel from a Business Portal client computer, you must install Microsoft Office Web Components. If Microsoft Office 2007 or 2010 is installed, you must install the Office XP Web Components. If necessary, the Office XP Web Components (owc10.exe) can be downloaded from the Download Center (www.microsoft.com/downloads).

1. Go to the Timecard Status page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Timecard Status** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Timecard Status** on the Quick Launch

2. In the **Pay Periods** web part, select a pay period.

3. The **Employee Timecard Status** web part displays a list of employees and indicates who has submitted timecards, and who hasn't.

   To export this information to Excel, click **Copy to Excel**.

   By default, the Excel spreadsheet will be saved to C:\Documents and Settings\<user name>\Desktop.

Chapter 16: Timecard history

If you are a Payroll Administrator, you can use the Timecard History page, which is part of the HRM Self Service Suite's Time and Attendance application, to view timecard history information for all employees.

This information is divided into the following sections:

- *View timecard history information*
- *Terminated timecards*

View timecard history information

Use the following steps to view approved and terminated timecards for all employees. (These timecards can't be modified.)

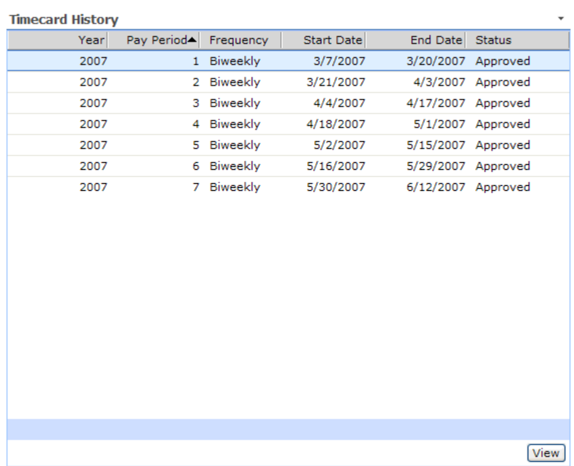
1. Go to the Timecard History page.
   Point to **Business Portal** on the top link bar > click **Payroll Center** > click **Timecard History** on the Quick Launch
   -or-
   Click **Payroll** on the top link bar > click **Timecard History** on the Quick Launch

2. Select an employee from the **Employee List** web part.

3. The employee's approved and terminated timecards are listed in the **Timecard History** web part. To view a specific timecard, select it and click **View**.

Terminated timecards

The Timecard History page displays approved and terminated timecards for all employees.


Timecard History

Year	Pay Period	Frequency	Start Date	End Date	Status
2007	1	Biweekly	3/7/2007	3/20/2007	Approved
2007	2	Biweekly	3/21/2007	4/3/2007	Approved
2007	3	Biweekly	4/4/2007	4/17/2007	Approved
2007	4	Biweekly	4/18/2007	5/1/2007	Approved
2007	5	Biweekly	5/2/2007	5/15/2007	Approved
2007	6	Biweekly	5/16/2007	5/29/2007	Approved
2007	7	Biweekly	5/30/2007	6/12/2007	Approved

View

If an employee's timecard has been terminated, the employee (or his or her manager) must delete the terminated timecard before a new timecard can be created for the pay period. For more information, see *Delete a timecard* on page 39.

Chapter 17: Recruiting

You can use the Recruiting page, which is part of the HRM Self Service Suite's Recruitment application, to post job openings and review the applications submitted for those positions. You can also use the Recruiting page to track the costs incurred by the company to fill the positions.

This information is divided into the following sections:

View job postings

A job posting is a request by a supervisor to fill a vacant position. Employees can view and apply for the vacant position through the Careers page.

Use the following steps to view job postings that are assigned to you as a supervisor.

1. Go to the Recruiting page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Recruiting** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Recruiting** on the Quick Launch

2. Select a position in the **Job Postings** web part.

3. Use the tabs on the right side of the page to view details about the position, including the position description and costs incurred by the company to fill the position. You can also view applications submitted for the position.

Create or modify a job posting

Use the following steps to create or modify a job posting.

1. Go to the Recruiting page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Recruiting** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Recruiting** on the Quick Launch

2. To add a job posting, click the **Create new job posting** link, located at the bottom of the **Job Postings** web part. The Add Job Posting page appears.

   To modify a job posting, select the job posting and click the **Modify selected job posting** link, located at the bottom of the **Job Postings** web part. The Job Posting Details page appears.

3. Enter position information. You must enter information in the **Status**, **Department**, and **Position** fields.

4. Click **Submit** to forward the job posting to your Human Resources administrator for approval.

View job posting costs

Use the following steps to view the costs incurred by the company to fill an open position. You can use this information to manage your resources and make budgets.

1. Go to the Recruiting page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Recruiting** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Recruiting** on the Quick Launch

2. Select a position from the **Job Postings** web part.

3. Click the **Costs** tab. The following information is displayed:

   Job Posting Cost This includes advertising costs and recruiting costs, such as recruiters' transportation and meal expenses.

   You can modify the advertising and recruiting costs on the Job Posting Details page of Business Portal. For more information, see *Create or modify a job posting* on page 87.

   Applicant Cost This includes travel and lodging expenses incurred by all applicants for the position. For example, the company might pay for applicants' airfare and hotel accommodations during the interview process.

   The applicant cost information is entered by your Human Resources administrator in the Total Costs window in Microsoft Dynamics GP.

   Total Cost This is the sum of the **Job Posting Cost** and the **Applicant Cost** amounts.

View applications

Use the **Applicants** tab on the Recruiting page to view applicants' contact information and application statuses.

The applicants listed on this tab may be company employees who applied for the position through the Careers page in Business Portal. They may also be people who are not employees of the company, whose application information was entered in Microsoft Dynamics GP by a Human Resources professional.

1. Go to the Recruiting page.
   Point to **Business Portal** on the top link bar > click **Manager Center** > click **Recruiting** on the Quick Launch
   -or-
   Click **Manager** on the top link bar > click **Recruiting** on the Quick Launch

2. Select a position from the **Job Postings** web part.

3. Click the **Applicants** tab.

4. Select an applicant. Click **Open**.

   The Applicant Details page appears. You can view an applicant's comments, education information, skills information, and test information. Click **Close** to close the page.

   When reviewing an application, you can't modify the applicant's personal information. Only the applicant or a Human Resources professional using Microsoft Dynamics GP can modify personal information. The date the record was changed and the person who changed it appear on the **Applicants** tab.

   Applicant status, which is also displayed on the **Applicants** tab, is assigned by your Human Resources professional in the Applicant window of Human Resources.

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