

**Crew Card**

**Administrative User's Manual**

14

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## Crew Card Interface Schedule

### Legacy systems data to Crew Card:

**Infrastructure** (4:00 AM Monday through Friday)

CANSYS - Bridges, Capital Inventory - Buildings, Equipment, Land, Rest Areas, Storage Locations and Towers

**Other** (4:00 AM Monday through Friday)

Sharp/RWM - Employees

WinCPMS - Maintenance Sections Reference Points

Consumable Inventory - Materials (new) Stock Locations/Stock Numbers

WinCPMS - Projects/Activities

Equipment Management System (EMS) - Preventative Maintenance Intervals

SMART Interface – Purchase Orders

**Consumable Inventory Balances** (Monday following CCFB Interface at 4:00 AM)

**Leave Balances** (2<sup>nd</sup> Tuesday of pay period at 4:00 AM. When a holiday falls on a Monday for the respective week the interface will be delayed by one day)

**Workflow Status Updates** (hourly Monday through Friday) (i.e. Emergency Events, 350 Requests, etc.)

### Crew Card data to Legacy systems:

**SHARP Interface** (4:00 PM Monday following pay period, with the exception of holiday weeks where the holiday falls on a Monday then the interface is ran on Tuesday)

**CCFB Interface (i.e. Labor, Equipment and Materials)** (4:00 PM Friday following pay period, with the exception of holiday weeks where the holiday falls at the end of the week then interface ran the day before the holiday)

**WinCPMS (i.e. Accomplishments)** (4:00 PM Friday following pay period)

### Within Crew Card:

**Clean up of Transfer of Maintenance Employees** (Friday following pay period at 8:00 PM)

## Questions Regarding Data

Workflow DOT 350's Supervisor Emergency Workflows Holiday week emergency report (DOT 12)	#RWMTeam/Ellen Laird
Equipment needing end miles/hours changed Buy Back equipment with already used DOT#	Tim Cunningham/Ellen Laird
Routine Questions about Crew Card	Ellen Laird
Computers, signature pads	District Techs
Confirmation report questions	Vivian Liu/#Admin_Support
Buildings, Land, Rest Areas, Stock Locations	Person at District level in charge of Capital Inventory Usually your district accountant
Routes/RP's	Robert Fuller/Ellen Laird
Bridges	Ellen Laird

## AOM Approval Rights

The Area Office Managers, Administrative Assistants, Personnel/Payroll Clerks and HRP's are automatic delegates "with approval" for the Level 1 and Level 2 supervisors/superintendents and cannot be removed. You have access to all crews within your respective district or area. If the supervisor accidentally removes your record, from his/her list of delegates, your name will reappear the next business day at 4:00 a.m.

Level 1 Supervisor – when assigning a designee with approval, the text (with approval – level 1) will be shown under the column heading of Type on the Designated Alternate Crew Admin screen.

Level 2 Supervisor (Superintendent) – when assigning a designee to do his/her Level 2 approvals for the Level 1 Supervisor they will see the text (with approval – level 2) under the column heading of Type on the Designated Alternate Crew Admin screen. The superintendents should delegate Level 2 approval to one or more of his/her supervisors in his absence.

**Notes:** Crew Card utilizes the RWM role table to determine the respective employees that are assigned to each role number (i.e. AOM (63), Administrative Assistant/AOM backup (75), Payroll Clerk (49) and HRP (73)). Crew Card only allows duplicates for the role of AOM backup. If an employee is moved out of a role and not put into one of the other role categories then this respective employee will no longer have access to any crews.

For larger districts that may require a backup to the HRP/Payroll Clerk we have had to manually delegate administrative staff in the database to see the district's respective crew lists. The disadvantage of being manually delegated is you do not have approval rights to any crew unless you supervise them.

## Emergency Events – Non Exempts

Emergency Events only need to be created in the following instances:

1. For non-exempt employees if an employee (KOSE and/or non-KOSE) worked on the holiday
2. Or if a non-KOSE employee worked on a non-holiday outside of their normal work schedule in the holiday week. This is done so that the holiday will convert to time worked and allow for overtime pay.
3. If the time worked was due to a snow and ice event, and it was during a normal work schedule then the time will be coded in the 10 column for that respective portion.

If no event is required to be created for a non-holiday(s), it is best to document the time(s) of the event along with the KOSE employee name(s) in the comment box on the work description page for future reference.

The creation of the emergency event is the trigger that opens up the AD-EM column for non-exempt employees. Time coded to Activity 521 AD-EM for non-exempt employees automatically pays the S10 “snow pay” so this time should not be coded in the 10 column.

Once the hours for the non-exempt employee(s) is entered into the AD-EM column then the SUBMIT button will be displayed on the Holiday Emergency Event screen. The event can be submitted to workflow either by accessing the HW EM link on the Project/Activity Grid or from the Review>Workflow tab. The submission of this event will generate a DOT 12 on the workflow side which will immediately send an e-mail notification to the supervisor with a link to the document. When the emergency is submitted to workflow the event will show a status of ‘ACTIVE’ on the Crew Card side. This status will remain ‘ACTIVE’ until the DOT 12 has been completed on the workflow side at which time it will change to a status of ‘COMPLETE’.

The supervisor will need to access the generated DOT 12 via their link in the e-mail or through their work list to complete the DOT 12 with the specific Holiday, organizational unit number and then SUBMIT. The form will then be routed to their respective AOM/HRP. The AOM/HRP will then open the form to review it for accuracy and to SUBMIT for further routing. Please process the DOT 12’s in a timely fashion by all individuals, preferably as close to Timesheet Monday as possible.

If a DOT 12 has already been submitted and is determined that it is no longer needed you will need to do the following:

If the pay period is still open, move the hours from the AD-EM column for the non-exempt employee(s) to the proper labor column and click on the event and hit the REMOVE button. Then send an email to #RWMTeam with the reference id of the DOT 12 and state why the DOT 12 needs to be cancelled. If the reference id does not show up on the user’s work list screen refer to the section in the manual “Setting Preference ID’s” to add the reference id to the user’s screen.

Note: Instead you could reject a Form 12 because it was submitted in error and was not needed which will reject it back to the initiator, the initiator can Cancel it by selecting Cancel and Submit. You will need to instruct the supervisor to open the form, select cancel and

submit but this may be way too confusing for the user. The hours would still have to be moved out of the AD-EM column for the non-exempt employee(s) to the proper labor column and click on the event and hit the REMOVE button.

If the pay period is closed, add adjustment records to show negative values in the AD-EM column for the non-exempt employee(s), show positive values in the proper column of the original records where the time should have been reported. You will also want to make a note in the Administrative Use Only column to state why the Holiday Week Emergency Event was cancelled. Then send an email to #RWMTeam with the reference id of the DOT 12 and state why the DOT 12 needs to be cancelled. Once this has been completed the emergency event link will now show a value of 'CANCEL' instead of 'ACTIVE'.

If the event aka DOT 12 is accidentally resubmitted from Crew Card, by hitting the SUBMIT button when clicking on the HW EM link, and the event is still valid you DO NOT want to delete the document out of workflow. Cancelling the 2<sup>nd</sup> document will show a status of CANCEL on Crew Card even though the 1<sup>st</sup> document was signed. The CANCEL status will signal to the auditor that this event was not needed and therefore time should not have been entered in the AD-EM column, which may not be the case.

#### **Notes:**

When a supervisor is temporarily on extended leave and another employee has been placed in that position, using the same KDOT position number, this causes a problem with the creation of the DOT 12 due to two employees in the same position. You will need to contact either the Crew Card System Administrator or BCS Administrative Support Staff to temporarily disable the original supervisor's employee information to allow the submission of the DOT 12.

Emergency time for a non-exempt "Crew Card" employee **must** have the event created in Crew Card in order for the holiday to count as time worked and for the employee to be paid correctly. Any employee listed in crew card must have the DOT 12 created in crew card. ONLY employees that don't have their time reported in crew card would have a DOT 12 generated directly from Forms Warehouse. Do NOT include "Crew Card" employees with the non-Crew Card members on the DOT 12 that is issued directly from workflow. This may require them to create 2 - DOT 12's, but in order for the Crew Card employee(s) to be paid correctly they must follow this procedure.

Outstanding Holiday Week Events – To determine if there are un-submitted events not sent to workflow to generate a Form 12 please go to the Review Screen > Workflow Tab for each respective crew in your area/district. If a link is shown that displays the date(s) and type of event shown below (i.e. Other will display the verbiage that the supervisor entered) then go to this date and please review whether the link was really needed (i.e. time coded in AD-EM column for non-exempt employee on a holiday or non-exempt non-KOSE employee not on a holiday. If the event is needed please remind the supervisor to update the start/end times and submit the event to workflow to generate the Form 12, populate the holiday and organizational unit so you can review and approve.

Snow and ice removal  
 Remove debris, or other cleanup from accident  
 Traffic control for accident or other emergencies  
 Replacement of stop sign, guard rail, etc.  
 Other

Form 12 Initiator – To tell if the Form 12 was initiated from Crew Card or from Forms



Warehouse go to your K2 Worklist, on the DOT 12 click the View Summary icon and wait for the report to open. It if has been started from Crew Card the Initiator will be BPSERVICE as will the Destination User on the first step, example shown below.

Initiator: **BPSERVICE** Start Date/Time: 12/28/2012 11:05:33 AM

Process Name	Reference ID	Activity Name	Destination User	Start Date	Finish Date	Status	Final Action
DOT Form 0012	35431		<b>BPSERVICE</b>	12/28/2012 11:05:34 AM	12/28/2012 11:05:34 AM	Completed	Proceed
DOT Form 0012	35431	Complete CC Report	breeh	12/28/2012 11:05:46 AM		Active	

Form 12 Review and Approval – Form 12’s must be reviewed and approved in a timely manner by both the AOM and HRP in order for Fiscal Services to get the final e-mail notification to verify that employees were paid correctly prior to the timesheet interface. In pay periods where the holidays (i.e. July 4<sup>th</sup>, Christmas/New Year’s) fall in week 2 there must be close attention paid. The HRP “must” perform the final review and the payroll clerk cannot sign for the HRP even though the payroll clerk may have access to the HRP’s worklist.

If the exempt supervisor is the only employee that had emergency time then no emergency event needs to be created. Their time will be coded to the AD-EM link by entering start and stop times of the event. See section titled “Emergency Time – Exempts” for more information on this topic.

## Emergency Time – Exempts

Emergency Time for exempt employees will need to be reviewed to determine whether the employee will be paid the correct number of blocks. Some things to check for are as follows:

1. Make sure that time is not reported for ½ hour before the work day and/or ½ hour lunch break. These do not count towards Emergency Pay.
2. Any timeframe that crosses midnight into the next day will need to be coded to the next day. The correct number of emergency blocks to be paid out will need to be computed first in order to determine how the start and end times should be reflected in Crew Card. The actual start and end time will need to be documented in the comment box on the work description page.

Example 1: If the event ran from 11:00 p.m. to 1:00 a.m. coding the time from 11:00 p.m. to midnight on day 1 and from midnight to 1:00 a.m. on day 2 would have paid the employee the incorrect number of blocks. From 11:00 p.m. to midnight would have paid them one block and from midnight to 1:00 a.m. would have paid them another block where they should have only been paid one block. For this example the time would have to be coded on day 2 from 12:00 a.m. to 2:00 a.m. so they are paid the proper number of blocks.

Example 2: An event that started at 9:30 p.m. and lasts until 1:30 a.m. (2 blocks) could be shown as either (9:30 p.m. to 11:30 p.m. (1 block), and 12:00 a.m. to 1:30 a.m. (1 block)) or (12:00 a.m. to 3:30 a.m. or 4:00 a.m. (2 blocks)).

Note: If emergency time is worked on the holiday but crosses over to the next day the start and stop times will need to be evaluated as to how to show the correct times so an employee's pay will not be affected. Reference SOM's 2.2.3 and 2.2.10.

Example 3: If an employee worked 5 hours of emergency on a scheduled day of work (i.e. 1:15 am to 6:15 am) and then does not report to work during the normal work hours the employee will need to report 8 hours of annual leave since the emergency time worked is outside of their normal work schedule.

**Exempt employee's performing emergency work outside of their normal schedule may not trade that time for a day off later in the same week. To do so would be treating the employee as you would a non-exempt employee and not in compliance of the Fair Labor Standards Act.**

## Equipment

Equipment normally under \$500 is not stored on Capital Inventory therefore it is not brought down to Crew Card to allow equipment charges and/or 350's to be applied. Only equipment that is stored on Capital Inventory, has a status of 'ACTIV', and an EMS – Equipment Management System life-to-date record will be brought down to Crew Card. Please review your inventory of equipment and if you have any questions as to why a piece of equipment is not on inventory please check with your District Shop Superintendent.

All equipment that is owned by a maintenance crew is only to be keyed in Crew Card. **Do not** allow time to be keyed against any of those pieces of equipment in the old CICSP system. If it happens, this results in Crew Card's LST MILES/HOURS balances becoming out of sync with what the piece of equipment actually shows. Then an adjustment has to be made in Crew Card along with documentation to get it back in sync with where it should be in order for the owning crew to report the correct miles/hours to it the next time they use it.

In order to determine why new equipment may not be showing up in Crew Card please access the Capital Inventory system on CICSP using DTQA > 1. Equipment Menu > 1. Inquire on Specific Equipment Record > then type in the DOT# and press Enter. If the status is shown as INACT and/or the DD-AA-SS does not have the correct location and/or there is no Equipment Management System (EMS) life to date record this is most likely why it is not available in the equipment grid. Note: You can access the Life to Date information by hitting the PF8 key to page down twice. If there is no life to date information then the shop will need to charge something to the vehicle first that will physically create the life to date record. If the life to date record exists but the miles and/or hours fields do not have a value and the vehicle received had a starting value greater than zero then you will need to send a note to Tim Cunningham in the Bureau of Maintenance and carbon copy Ellen Laird to have Tim update the EMS record with the correct information so Crew Card will show the correct starting value.

If Capital Inventory is closed due to year-end then you will need to check with Fiscal Services to see if they can update the status and/or Location for you. If they can update the status from INACT to ACTIV but cannot update the location then the supervisor will have to borrow the equipment until the location is changed to the correct value. When the location can be changed on Capital Inventory, the Supervisor will need to remove the equipment from the borrowed list prior to making the location change or his/her list will not built properly and will continue to show the equipment as borrowed even though it has been moved to their respective location.

For new equipment whose meter units (miles and/or hours) have a starting value greater than zero an e-mail must be sent to Tim Cunningham and Ellen Laird with the starting values so they can be set in EMS and Crew Card respectively.

For equipment that now has a broken meter and the meter has been changed out. Please send an e-mail to Tim Cunningham and Ellen Laird with the broken meter value on the old unit and the meter unit value on the new unit to have them set the broken meter values in EMS and Crew Card respectively.

For equipment that are considered buy-back and the DOT number remains the same but the dealer is changing out the equipment please send an e-mail to Tim Cunningham and Ellen Laird informing that this piece is a buy-back with the meter value on the old piece of equipment and the meter unit value on the new unit to have them update EMS and Crew Card respectively.

If you are the owning supervisor and are part of Crew Card and you loan out a piece of equipment to a supervisor that isn't on crew card the owning supervisor will have to key the equipment time in Crew Card for the borrowing supervisor coding the time to the borrowing supervisor's respective project until the borrowing supervisor comes on board with Crew Card. I know this is not the ideal situation but until your Construction and headquarters personnel are on board with Crew Card it will sure save some headaches on the backend in trying to resolve errors.

If a maintenance crew uses a construction, shop, materials or administrative vehicle on an occasional basis please perform the data entry in the old CICSP system **not** Crew Card. Note: This equipment will be shown in the Crew Card drop down list because if a 350 request needs to be reported on this piece of equipment when used by maintenance they can do so prior to giving it back to the respective user.

For all equipment time that was previously reported in CICSP and now needs to be reported in Crew Card if there is outstanding usage for these respective piece(s) of equipment it will need to be keyed in CICSP first for each prior pay period that it was used. The supervisor will need to be instructed to wait until the equipment time that was entered into CICSP and has updated the Equipment Management System with the correct life to date miles and/hours after a life to date record exists. Then Crew Card should automatically be updated with the correct starting value "if" the user does not put any entries into Crew Card first. The supervisor will need to check the value prior to doing any entries for the first pay period to ensure that it has the correct value prior to putting data into Crew Card. If it does not have the correct value then we will need to determine why.

In Capital Inventory, if the equipment has an area/subarea value of 'xx-00-98' because it is due to be replaced but then is loaned out to an area/sub-area to be temporarily utilized and to report equipment time, the DD-AA-SS location should be changed in Capital Inventory to reflect the location that is currently using it. Once the equipment is no longer being utilized it can be moved back to the 'xx-00-98' location. This will allow the equipment to be approved in Crew Card at the end of a pay period as long as the supervisor does not have the equipment in their respective borrowed list.

Adjustments – if an adjustment is done during an open period, the interface will pick up the adjusted end miles/end hours value rather than the original. The user should have un-approved the equipment and made the change to the equipment versus an adjustment.

## Leave

Leave balances will come down to Crew Card on the 2<sup>nd</sup> Tuesday of the pay period. If a holiday falls on the 2<sup>nd</sup> Monday of the period (i.e. 1/18/10 – Martin Luther King) then the leave balances won't come down until the 2<sup>nd</sup> Wednesday of the pay period.

On the Leave Time screen a borrowed employee will not show up in the list for the borrowing supervisor. The borrowing supervisor can enter leave for a borrowed employee but it must be done off of the Add Labor screen that was built for a project. Make sure you have a project row highlighted that the employee worked on during the week, click the leave link off of this project number and the employee's name will already be populated. Once you save the leave and save the labor grid entries the leave will not show up in the borrowing supervisor's Labor Grid but will be visible from the borrowing supervisor's Review screen so modifications/additions can be made there.

D-Day leave balances for the new calendar year will be visible in Crew Card the 2<sup>nd</sup> Tuesday of the respective pay period which is to be paid in the new calendar year. Example: The pay period 12/27/09 to 1/9/10 was the first pay period that was paid in 2010 so the leave balances for the start of 12/27/09 came down on Tuesday 1/5/10 and reflected the new D-Day value.

On non-exempts there is no leave code for LWOP (leave without pay) like there is for exempts so do not code any time associated with time not worked.

### Adjustments:

If you need to enter an adjustment on the Leave Tab but the weekly drop down list only goes back so far, go to the Activities Tab for the starting day of the week you are trying to correct, click on Review All Activities checkbox, find a day in the week where the employee had leave and click on the leave link that will take you to the Leave Screen for the respective week so adjustments can be made. Note: Do not un-approve the pay period to enter the adjustment.

If you need to add a leave type that was not initially there and you are now in a closed pay period make sure the correct week and employee's name are selected via the Leave Time Tab and select the appropriate Leave Type and then press the Add Admin Adjustment button. Once the adjusted row is created then you can edit it and put in the appropriate positive value for the day.

Adjustments to leave in a closed pay period with a negative/positive value will not update the running leave balances in Crew Card that are for the current pay period or the last time we received leave balances minus any leave taken during the current pay period or in the future. The real adjustment to the balances must be done in Sharp and then cycle down the 2<sup>nd</sup> Tuesday of the pay period.

A negative leave balance may be shown for an employee once he/she leaves the state system. The employee's record may no longer be accessible from the Leave Tab. If any corrections or adjustments need to be made, you can access the respective employee's record

by clicking on the leave link either from the Review Screen or the employee's labor record from the Activities Tab.

## Sharp

The crew supervisor is determined in Crew Card by the location (DD-AA-SS) of the employee and the title code (i.e. 3087N3, 3088N3, 066806, 08807) from Sharp and maintained in the table CC\_CREW along with the report to supervisor (2<sup>nd</sup> level), area administrative person (i.e. AOM), and/or district administrative person (i.e. payroll clerk at Districts 2-6, HRP I at District 1). If any of the values (i.e. position location/number, title code, report to supervisor values) have changed then the respective row(s) on CC\_CREW will be set to null and the supervisor, report to supervisor, and/or administrative staff will not be able to access crews in Card Card.

Note: 543's will need to be sent in by your district tech to keep active directory up to date and Azman requests to #IIS\_Support if a position number needs to be added/deleted due to a change.

The crew lists are built based upon three things: Borrowed Employees Indicator, Location (DD-AA-SS) of the employee, Report To Supervisor Number.

The borrowed employee indicator is reviewed first, so if a maintenance employee transfers between crews and are still shown in the borrowed list of the now owning supervisor the employee will be shown as a borrowed employee and not as a real employee of the crew. Please remind the supervisor to remove the employee from their borrowed employee list and to wait for the crew list to be built automatically.

When an employee in the crew is being temporarily promoted to an acting supervisor until the supervisor's position has been filled the employee must have the same DD-AA-SS as the vacant supervisor's position in order to not cause problems in the CC\_CREW table which controls the drop down to the supervisor's list.

Please ensure that the EFFECTIVE\_DATE on Sharp is updated in a timely fashion so an employee shows up in the proper crew at the proper time.

In Sharp there is a box, confidential indicator, and if it is marked then the employee is considered non-KOSE. If this is not correct then this will cause issues on holiday weeks with converting the holiday to HOO.

On a transferring employee if the position record still shows VACANT and not FILLED because the 20A has not come through the employee may not get built in the Crew Employee Cross Reference Table even though the location key and report to fields show the correct location and supervisor. The Crew Card Administrator can add the record to the cross reference table so the employee shows up on the crew list.

**Note:** For a maintenance employee that has transferred between crews and are showing in both crews, if the location of employee is correct, and the Report To Supervisor is correct, the clean-up program that runs on the night of CCFB Friday will remove the employee from the "transferring from" crew list. May want confirm with District Personnel Clerk or HRP to assure that the appropriate changes have been made prior to the clean-up program.

## Purchase Orders

Purchase Orders that need to come down to Crew Card must have the coding that has a Agency Use (KDOT account) = '4300', valid Account (Object Code) (i.e. 534201, 534204, 534207, 534209, 534215 or 534217), Quantity, Unit price and Amount with values greater than zero, the unit = 'TN' or unit of measure that equals the unit in the Consumable Inventory system, valid Service Location (Stock Location) and valid Stock Number in the Chartfield2 field starting with 'SN31'.

The fuel adjustment, demurrage, and/or pump charges are coded to a separate object code from the material being ordered. This is done in order to not affect the unit price of the material that is put into stock by the contract price.

Note: The commodities for object code 534212 (i.e. Magnesium Chloride, Asphalt Rubber Sealant, Cement and Concrete Quick Set) will not interface to Crew Card and the receipts must be entered into CICSP.

When the purchase requisition has been approved, cleared budget checks and been dispatched it is converted to a purchase order then the SMART system will interface the record to a KDOT interface file the following business morning at approximately 9:00 a.m. The next business day the Crew Card interface cycle will pull the interface file and process all transactions that have not been previously processed. This creates a two business day delay from SMART to Crew Card if the interfaces are successful.

PO's will not show up on the Voucher screen in Crew Card to apply any vendor receipts if there has not been any activity on the CICSP Consumable Inventory side that would have created a master stock record. You can tell if no activity has been performed on a stock location/stock number on CICSP if the stock record inquiry screen is blank or you receive a "record not found" when trying to display a master individual record. Your only options are to 1) enter a partial receipt into CICSP which will then create a master record and then the ETL process will allow the PO to come into Crew Card so the supervisor can finish entering the remaining receipts or 2) you will have to manually enter all of the receipt(s) into CICSP.

Once a purchase order is brought down to Crew Card it is never removed. Change orders should only be done when the quantity, unit price, \$ amount or shipping information are incorrect. Changes to other fields should not be done via change order to avoid a possible duplicate order to the vendor in SMART.

If the following fields are missing or incorrect: KDOT account (i.e. 4300), Stock Location, Stock Number, Object code or Unit of Measure does not match value shown on Consumable Inventory for respective stock number, and the purchase order has never interfaced to Crew Card then the receipt(s) (partial/full) must be manually entered into CICSP Consumable Inventory. The receipt(s) should be done by CCFB Friday so the new balance will come down to Crew Card on the Monday following CCFB Friday. You will need to contact Ami Fulghum in

Fiscal Services to determine if the money brought into CICSP is correct. The incorrect or missing values will need to be updated prior to moving to the voucher process in SMART.

If a change order is done on a PO in Sharp to increase the quantity (i.e. 200 to 500) but receipts have already been applied to the PO in Crew Card then the change in quantity is not reflected in Crew Card. If the receipts have not been processed you can remove the receipts, let the increase in quantity come into Crew Card and then reapply the receipts back to the PO. Hopefully this is within an open pay period so the original received dates are still available in the drop down list.

**Note:** Once a purchase order starts into the voucher process for payment it will not be brought down to Crew Card.

If the stock location and/or stock number changes after a purchase order has been initially brought down to Crew Card those respective changes will not show up in Crew Card. The AOM will need to review and follow the steps outlined below:

1. The AOM will need to remove any non-interfaced receipts against this purchase order and CLOSE out the purchase order in Crew Card and manually enter the receipts (partial/full) in CICSP against the correct stock location/stock number by CCFB Friday so the new balance will come down to Crew Card on the Monday following CCFB Friday. You will need to contact Ami Fulghum in Fiscal Services to determine if the money brought into CICSP is correct.
2. If any receipts have already interfaced to Consumable Inventory from Crew Card in respect to the incorrect stock location/stock number then Ami Fulghum in Fiscal Services will need to be contacted to await further instructions on how to correct/handle the situation.
3. Check with Fiscal Services to determine what changes need to be made to the voucher in SMART prior to payment.

If stock was received at the wrong location and not caught prior to the interface from Crew Card to Consumable Inventory then the stock must be transferred to the correct location in CICSP and send Ami Fulghum in Fiscal Services a copy of the transfer for her to double check the money.

The unit price that is reflected on the purchase order, the day the CCFB interface is run, is what is used to calculate the \$ amount of the transaction(s) for the receipts and issues. If for any reason the unit price needs to be changed midstream once receipts and issues have previously interfaced and posted to CCFB/Consumable Inventory then these transactions must be reversed and re-added back to CICSP with the correct \$ amount based upon the new unit price in order to keep SMART and Consumable Inventory in sync in regards to quantity and dollars. Please contact Ami Fulghum in Fiscal Services to reverse the entries so the proper documentation of corrections is made for FYE balancing reports.

## Vendor Receipts

The AOM can change the date received, quantity received and ticket number on tickets received by the supervisor as long as it has no “processed date”. When a receipt, entered by the supervisor, forces the %Filled to go over 95% the transaction’s status will be changed to “Pending”. The AOM’s can modify the final receipt, if needed, to make it agree with the final invoice from the vendor. When the post date is entered by the AOM, the status is removed from pending status. Once a transaction has been processed and has a Process Date it can no longer be modified by the AOM.

### Notes:

Do not lump tickets together or round the quantity ticket values on any of the receipts. The program that interfaces these records to CCFB/Consumable Inventory will do that for you. If all tickets have interfaced then the balance that comes down from Consumable Inventory on the Monday following the CCFB interface will show it as a whole number once again. Please instruct your supervisors to ignore the decimal values when they are charging out material.

Once the %Filled surpasses 105% the Add Receipt link will be removed. If there are more receipts that still need to be applied you will need to edit the final Pending receipt to modify the quantity to include the sum of the respective receipt along with the remaining receipts values not already entered. This is the **only** exception where you can list all ticket numbers together in the Ticket Number field that comprised this total.

When finalizing any receipt that has a status of Pending assign Post Dates to the receipts based upon the order of the Received Date. If you finalize Pending receipts out of order this will cause problems with the assignment of the Post Date for any unprocessed receipt that still has a Pending status.

Try to obtain an invoice from the vendor in a timely fashion in order to keep issues from interfacing to CCFB without corresponding receipts.

### Modification of the final receipt:

Please review the following two questions before proceeding to the Steps listed below:

Question 1 – a) If you have never modified the unit price on the purchase order since its origination or b) if you have modified the unit price on the purchase order but before receipts and issues were already interfaced to CCFB/Consumable Inventory then proceed to Step 1.

Question 2 - If receipts and issues were already interfaced to CCFB/Consumable Inventory, prior to the unit price being changed on the purchase order, then these inventory transactions must be reversed on CICSP and added back to CICSP with the correct \$ amount based upon the new unit price in order to keep SMART and Consumable Inventory in sync in regards to quantity and dollars. Please contact Ami Fulghum in Fiscal Services to reverse the entries so

the proper documentation of corrections is made for FYE balancing reports. Once the Consumable Inventory transactions have been reconciled then proceed to Step 1.

Steps:

1. Exclude any demurrage or pump charge from the final invoice total before proceeding to Step 2.
2. Review the “Received” quantity shown on the Edit Voucher Screen.
3. If this value matches what will be paid for on the invoice then you do not need to modify the receipt value and proceed to Step 6.
4. If this value does **not** match the invoice, add/subtract to/from the receipt value to get the “Received” quantity to correspond with the invoice value.
5. If a change was made to the receipt quantity in regards to Step 4 then review the Materials/Report/Review screen in Crew Card to make sure that any issues that have been applied to this stock location/stock number for the open pay period(s) have not put the ending balance into a negative value. If the value is negative you will need to adjust an issuing record to get back to a positive ending balance.
6. When you know the final invoice amount and you are reconciling the pending receipts on Crew Card so the receipt(s) will be interfaced with the next upcoming CCFB interface, assign the Post Date to coincide with the pay period that will be processed on the next interface to CCFB (i.e. normally Friday of the same week as timesheet Monday). This would be the same pay period that is pulling labor and equipment records as well. Do not use a post date of the last Saturday for the prior pay period because it will not interface the respective record. Try to populate post-dates for a prior pay period no later than the Thursday in the same week as timesheet Monday because if you wait until Friday it sees this pay period as already being locked due to the CCFB date that is in the table CC\_PAY\_PERIOD. For example, the vendor receipt transactions for the pay period of 2/7/10 to 2/20/10 will interface to CCFB on Friday 2/26/10. The post date must have a value of 2/7/10 to 2/20/10 in order to be processed at the time of the CCFB interface. If you are trying to assign a post date on CCFB Friday and the drop down list no longer displays dates from the pay period you are trying to close then contact the Crew Card System Administrator to assist you in assigning a post date value. Upon Post Date assignment of the last Pending receipt the Purchase Order will be removed from a Pending Status. It changes the Pending to Open.
7. Change status on the purchase order to “Closed” by clicking on the OPEN Purchase Order Status link and select CLOSED on the Voucher Status screen and hit SAVE. This will remove the purchase order from the list so the supervisor can no longer record receipts.
8. The receipts for the purchase order with the same Post date will be summed together and interfaced to CCFB with a quantity rounded to the nearest whole number.
9. The receipt(s) will interface to CCFB the Friday following the end of the pay period. If the interface date falls on a holiday then the interface will execute on the day before the holiday.
10. The transactions will post to Consumable Inventory once they reach a “READY” status in CCFB.

**Notes:**

If the Post Date for a receipt(s) does not fall within the pay period date range of the CCFB interface, as stated in Step 6, then it is most likely that issues will interface to CCFB without corresponding receipts. In this event, if there is not a sufficient stock quantity on Consumable Inventory the issuing transaction will error out and the balance that comes down to Crew Card for the respective stock location/stock number on the Monday following the interface will contain the wrong value. This transaction(s) will remain on ERROR status for two weeks until the next time the CCFB interface runs – or longer if the pending receipts are not posted so that they can interface over.

If you are waiting for invoices from the vendor try to obtain an invoice from the vendor in a timely fashion in order to keep issues from causing this error.

Please ensure that all receipts entered into Crew Card have been applied to SMART as well in order to process the payment. The quantities in Crew Card, SMART and Consumable Inventory and the \$ amount in SMART and Consumable Inventory must match.

Receipts with a received date and post-date that do not occur in the same pay period will cause the material to show up on different Materials Report than expected. For example, the receipt has a received date of 3/29/13 but has a post date of 4/5/13 which does not fall in the same pay period. The transaction will appear on the Materials Report for the pay period of 3/17/13 to 3/30/13 and not on 3/31/13 to 4/13/13. Since the transaction will not process due to the post-date not falling in the same pay period this will cause the Materials Report to have a different balance than expected even though the Materials screen balance still reflects the outstanding receipt that has not been processed.

## End of Pay Period Approvals

The Inspector General requires two approvals on Labor, Equipment and Materials. It is preferred by the Bureau of Maintenance to have the Superintendent do the 2<sup>nd</sup> level approval if at all possible.

**All three must be approved.** Approval of crews labor in Crew Card should be done by noon (or earlier) on Timesheet Monday. The approval of Material and Equipment may be done Monday afternoon or on Tuesday morning following Timesheet Monday so that the system is not overloaded. There are certain edits for hours used and miles driven that are only invoked when the approval is done on the Equipment Review screen. If the equipment approvals are not done then they do not know that these errors exist and will cause problems when the data is interfaced to CCFB. The equipment daily usage on the Review screen must also be reviewed to ensure that a negative value is not showing. This can be caused by entries moved from one day to another via the Project Accomplishment/Activity screen without having to rekey the entries. Materials and Equipment must be approved also (even if they didn't have any usage for the respective pay period).

Level 1 approvals **MUST** be completed before the Level 2 can approve. Level 2's do **NOT** receive any notification if the Level 1 approvals are not done. If the Level 1's are done then the Level 2 approval box will show up in the lower right hand corner of the Labor Review screen.

Note: E-mails will be auto-generated mid week of the week following the pay period to inform the supervisor/their supervisor/administrator of any Level 1 approval(s) that are not completed (i.e. labor, equipment, and material).

## End of Pay Period Reviews

1. In a holiday week – a) ensure that if any emergency time is worked outside the normal shift that an emergency event(s) is created for non-KOSE covered employees so that their holiday counts as time worked – review confirmation report to make sure that time is listed in the HOO row of the Holiday column, b) ensure that emergency events were **not** created for KOSE covered employees in a holiday week except for any time worked on the holiday(s), c) ensure that employees who should receive holiday credit are coded with 8 hours and other employees such as temporaries, exempt employees on leave without pay, etc. are coded to 0 hours. For more information on KOSE/non-KOSE see page 50 in the Crew Card User's Manual or e-mail in Shared Folder > Crew Card FAQ's dated 1/5/10 titled "HW EM Events – DOT 12's".
2. Check the confirmation report for correct conversions of the data to HDP, HDV, and OTP.

### The short version---

Under the confirmation report heading Holiday:

HDC - employee's holiday credit (exempt and non-exempt)

Note: Interfaced to Sharp as HDC and then converted to HD1 payroll earning code and interfaced to CCFB as HD1.

HOO - employee's holiday credit if they are KOSE or if they worked a declared emergency during the week.

Note: If a KOSE covered position works on the holiday on a non-emergency (i.e. construction) the holiday credit split between HDC & HOO.

Under the confirmation report heading Holiday Worked:

HDP – non-exempt employee's hours worked on the holiday if they have not yet attained 40 hours worked in the week; also exempt hours worked on a holiday (See Holiday Note below)

Under the confirmation report heading Holiday Premium:

HDV – additional premium pay at the .5 rate for hours worked on a holiday after already attaining 40 hours worked in the week (non-exempt).

### The long version---

#### KOSE Eligible

HOO – the "holiday credit" is shown as HOO and counts as time worked. If a KOSE employee works a non-emergency task on the holiday, the number of hours he worked reverts to HDC/HD1. The remaining holiday credit hours, if any, stay as HOO. The

hours he works on the holiday will also be paid as HDP. Number of hours in HDP should equal number of hours in HDC/HD1.

### **Non KOSE Eligible**

#### **Exempt employees**

1. The “holiday credit” is shown as HDC/HD1 and does not count as time worked.
2. Time worked on the holiday is shown as HDP (pay is at 1.5 rate for the time worked on the holiday).

Non-exempt employees – the “holiday credit” will be shown as HDC/HD1 and does not count towards time worked. If there is an emergency event during the holiday week and time is coded in the AD-EM column for the respective employee then the “holiday credit” will be shown as HOO and counts as time worked.

### **Regardless of KOSE/non-KOSE Eligibility**

#### **Non-exempts**

If there was an emergency event during the week or on the holiday:  
Employee worked on a holiday, but employee did not reach 40 hours worked on or before the holiday, then HDP = holiday hours worked on the holiday. See Holiday Note below.

Employee worked on a holiday, and employee reached 40 hours worked on the holiday, then number of hours worked on the holiday before reaching 40 would be counted as HDP. Once the employee reaches 40 on the holiday, the remaining hours worked will be paid as OTP. In addition, the employee will receive HDV at the .5 rate for the same number of hours as the OTP. See Holiday Note below.

Employee worked on a holiday and 40 hours worked has been reached before the holiday. Then OTP = holiday hours worked, and HDV = (holiday hours worked times .5 rate). Any hours worked in the remainder of the week following the holiday will be shown as OTP. If the employee had attained 40 hours worked prior to the holiday, they will be paid at the OTP for those hours as well. See Holiday Note below.

**Holiday Note** - If time is worked on both an actual/observed holiday (i.e. Sunday/Monday or Friday/Saturday) then the day with the largest amount of hours is kept as holiday time (HDP) and the smaller amount of hours is converted back to ‘RE1’ or ‘EMG’ depending upon if it is a non-exempt or exempt employee. The interface will determine if there are overtime hours involved for a non-exempt and convert the ‘RE1’ to ‘OTP’ at that time. Time worked on the Thanksgiving holidays are both counted as holiday time (HDP) until 40 hours worked has been attained, at which time, the pay will be converted to OTP and HDV for the holidays.

- Emergency Pay (Exempts) – time coded to proper start and end times excluding ½ hour before work and ½ hour lunch hour and if end time crosses midnight that the start and end time are shown on the following day and the actual start and end times are documented on the work description page. Instead of waiting for the emergency sheets to show up in your e-mail you can check the Labor Review Screen to see if any of the

M

exempt supervisor’s daily values for the pay period are highlighted in red **11** . If they are hover over the value to see if it says EM and if it does then click on the daily link. This will bring up all projects associated for that day and then click on the AD-EM link

AD-EM

for the appropriate project number 3.00 and the start and stop times will be

	Start Time	End Time	Hours
	4:30 PM	7:30 PM	3.00

displayed. These should only reflect times outside the normal work hours.

Exempt employee time worked on a holiday – since an exempt employee’s time is paid out at 1.5 of their hourly rate instead of blocks on the largest holiday (i.e. actual vs observed) this could cause an error on the Sharp interface particularly if the hours do not calculate to .25 increments such as  $1.25 * 1.5 = 1.87$  which is not an acceptable increment so Fiscal Services would have to help correct Sharp.

- Fringe – for an employee who should be reporting fringe check the Labor Review screen to see if there is a value for the link in the Fringe column and it does not say 0 or NA.
- Check to see that all timesheets for your respective crews are approved and submitted in Crew Card prior to the 4:00 p.m. Sharp interface. They should either show the Unlock link, or the checkmark due to the 2<sup>nd</sup> level approval being done. This means that the timesheet should have been sent to workflow barring any system glitches.
- Check the Labor Review screen to make sure that any employee showing more than their normal daily amount of hours does not have NR putting the employee at more than 8 hours for the day. Hours marked as NR in Crew Card may not show up on the confirmation report as ‘NOR’ if the original calculation puts the earn code as overtime or any other earn code besides RE1. Overtime hours are extracted and converted from the end of the week working its way backwards day by day towards the first of the week. If the time is not converted then the records with a task of NR will be processed with an earning code of ‘NOR’ on the Sharp interface and added to the 110 report.
- Check the CMP E column on the Labor Review screen to confirm that the supervisor has accurately reflected all possible comp earnings for each week by comparing how many extra hours the employee has worked for that week and if the value in the Work column minus 40 equals the value in the CMP E column.

8. Check the Vendor Receipts screen for each supervisor to determine if there any

Status

PENDING

receipts that has put the Purchase Order in a Pending status. If all receipts have been posted please check with the vendor to determine if an invoice can be obtained so that these receipts can be marked with a post date that will fall within the date range of the pay period that will be processed on CCFB Friday. See Modification of the Final Receipt under Vendor Receipts section above.

9. During winter season, ensure that adequate Salt Brine balances for a given two week interval are entered into CICSP so that proper balances will come down to Crew Card on Monday following CCFB Friday. You can run the Materials Report by stock location and stock number 31300010 to see how much salt brine has been used for the pay period and what the ending balance is to determine if you need to receive more into stock on CICSP. Salt brine can be entered into and tracked at any location that has a storage tank. See the e-mail from Mark Clements from 8/21/2009 titled "New Procedures for Tracking Salt Brine Use, e-mail from Kathy Lucero on 2/19/10 titled "Salt Brine – SNICE" and e-mail from Ellen Laird on 2/23/10 titled "Salt Brine CICSP/Crew Card for more information.

## Timesheets

### Signatures

When the labor data has been approved in Crew Card and submitted to workflow to generate a timesheet, supervisors will receive an email from the Workflow system with a link to the workflow document for each of their crew members that will require both the employee and supervisor's signatures. When the timesheet workflow form is opened the employee will sign next to "Signature" and the supervisor will sign next to "Approved", SUBMIT to route the document to Document Management for final storage.

Signatures on timesheets in Workflow DO NOT need to be done right away, but should be followed up on in a reasonable amount of time. Timesheets can sit in the supervisor's work list until the employee is available for signature, even if they are on vacation but must be signed by the employee or signed as employee not available for signature before 30 days old.

Once the timesheet is in the Supervisor's Work list, one of the following four Timesheet Options can be done:

1. Approve:Submit – This option is only to be done after the employee and the supervisor sign the Workflow timesheet. This finishes out the process and the timesheet is now stored in Document Management.
2. Save:Submit – This option leaves the timesheet in your work list, but you will NOT receive a reminder every single day. Reminders will only be received every **three days** after selecting "Save". Choose this option if your employee is not there to sign (they are on vacation or on sick leave).
3. Release – This option leaves the timesheet in your work list and you **WILL** receive a reminder every day. **If you notice an error on the timesheet and it needs to be resubmitted from Crew Card, in Intempo, you must RELEASE the timesheet by hitting the yellow RELEASE button so the resubmitted timesheet will replace the first version.** In K2, it will automatically replace the document. See Timesheet Changes or Adjustments on page 29 for more information.
4. Employee Not Available for Signature Box – This option is ONLY to be checked and a comment provided if a) the employee is on extended leave and has been gone longer than 30 days or you aren't sure if/when they will return, b) the employee has retired, resigned, terminated or c) the employee is on extended leave such as military leave.

If you need to insert an item/document to an employee's timesheet such as jury duty, military orders, special administrative leave, etc. you must do this prior to submitting the document to Document Management. Please complete the following steps below:

1. Prior to having the employee sign their timesheet you will need to scan the item/document that needs to be attached to the timesheet and save it in a location the supervisor has access too along with a relevant name for easily retrieval.
2. Once the employee's timesheet is opened from the work list, click on the Insert button towards the bottom left hand side of the screen. This will open a box that will allow you to search for the file previously saved in order to attach it to the timesheet.

3. When the file has been located double click on it and then it should insert it into the white box next to the Insert button.
4. Once this is complete then you will need to have the employee and the supervisor sign and submit the timesheet as you normally would.

DO NOT Insert/Attach a corrected timesheet to an incorrect version of the timesheet as a way of documenting what should have happened. Please make sure that the corrected version of the document is what is finally stored in DMS and not as an attachment.

Once the timesheet has been submitted and stored in Document Management, an email with a link to the completed timesheet will be sent to the supervisor's inbox. If the employee has an e-mail account the link to the completed timesheet will be sent to the employee's in-box instead of the supervisor.

**Notes:**

Timesheets are not generated in workflow when there are zero labor hours for an employee in a pay period on Crew Card. If you are audited, the district has a record on file that the employee was on a Leave of Absence, FMLA, etc.

If employees resign in week 1, it is best to not terminate them in Sharp until the 2<sup>nd</sup> Tuesday of the pay period. This will allow the leave balances to come down to Crew Card which is the trigger to enable the checkbox in the approval column. Then the timesheet should be submitted to workflow as soon as possible before the employee records are removed from the legacy systems (i.e. DB2/RWM).

If for some reason they are terminated prior to the 2<sup>nd</sup> Tuesday of the pay period you will need to accomplish the following tasks to generate a timesheet in Document Management:

1. Generate a timesheet from the Crystal Report Group Timesheet Report (found in crew card on the Reports tab, crystal enterprises, etc...) and print it off
2. Write on the lower left hand side of the document Employee's name "unavailable for signature due to (i.e. left KDOT employment, retirement, etc.)", along with supervisor's initials and date
3. Have the supervisor sign on the lower right hand side of the document with his title
4. Scan the document to an electronic file
5. Send the document as an attachment to #RWMTeam and state that this timesheet document needs to be added manually to Document Management.

If an employee terminates before they submit his/her final timesheet then the security on the Document Management System does not know which District/Area an employee is in. The workflow group will have to set the security so the timesheet can be checked out if necessary; changes made, and checked back in.

## Changes to Timesheet Stored in DMS

When the pay period has been closed and corrections are needed to a timesheet document that is stored in Document Management. You can refer to the e-mail dated 9/17/2008 titled "Timesheet Updated Process" for screen prints to do the following steps:

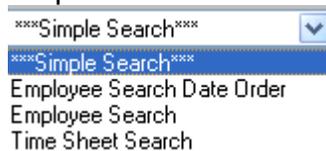
1. Open KDOT Intranet
2. Click on Document Management System



3. On the left, click Personnel Library.

4. On the top toolbar click on the Search mode button 

5. Drop down the search list and click on the Time Sheet Search option



6. You can enter a date, or select the drop down arrow on the far right of the Effective Date to select a date, or leave blank to access all pay periods.
7. Wildcards (\*) can be used in conjunction with the Employee Name parameter to search for a partial name, enclose the letters in asterisks (i.e. \*lai\*). If you know the entire name enter it as it appears on the timesheet without the asterisks.
8. If you know the Sharp Employee ID number you can enter this number in the respective parameter box.
9. You can enter any one or combination of the three as stated in steps 6 – 8.
10. Then click the green right sided triangle next to the Time Sheet Search drop down arrow to execute the parameter selection . Note: You can only view the timesheets that you have security to such as the District Personnel Clerks and HRP's should have security to their entire district and the AOM's and their back-ups should have security to their entire area.
11. To select a timesheet from the list, click on the radio button to the left of the Timesheet document you wish to open. 

12. Then click on the checkout button 

13. Save the timesheet document to your local drive.

14. Find the document that you saved to your local drive and open it. Use the print button in Adobe Reader to print the timesheet

15. After marking up the paper copy of the timesheet, rescan it and save the PDF file to your local drive. If you save the newly scanned timesheet in the same folder and with the same filename as the original (overwrite the file you checked out), then it will simplify the check in process.

16. Go back to the Document Management System in your browser and make sure that the radio button next to the timesheet you are working with is still selected. The entry in the list will have a red checkmark next to it.  

17. Click on the check in button 
18. You will be prompted to select the file from your local drive to check in. The default document is the one that you checked out. Click the Next button in this window. Be sure that the Keep Local Copy box is NOT checked and click on the Finish button.
19. When the check in process is complete you will get a message in the check in window that the Document has been checked in successfully.
20. Close the Check in Document window.

Note: To add an attachment to a document after a document has already been added to DMS the user will need to check-out the document using Adobe Acrobat and not Adobe Reader to allow the user to add documents as subsequent pages.

### Timesheet Changes or Adjustments

If the pay period **has not been locked** by the CCFB interface, changes in Crew Card will be made to the original data and **not with an adjustment**. If the Level 2 supervisor has already approved the data, the Level 2 will need to un-approve the data, supervisor/administrator will need to unlock the timesheet, make the appropriate changes and re-check the box for approval and resubmit the timesheet for signatures. The Level 2 will need to be notified to re-approve as well.

On the day(s) following the interface until the pay period is closed, when the employee's timesheet has been unlocked, the AOM, Payroll Clerk and HRP are notified by email which employee's timesheet has been unlocked and by whom. The e-mail is not triggered until a timesheet has been unlocked starting at 12:00 a.m. Tuesday morning. You need to communicate with your supervisor as to what changes have been made and whether they affect an employee's pay. If they do affect an employee's pay then you will need to make changes in Sharp as well.

If the pay period has been locked due to the CCFB interface, DO NOT un-approve the 2<sup>nd</sup> level for the pay period, and add adjustments within Crew Card via the Add Admin Adjustment button. These adjustments do not interface to any other legacy system. Also check out the timesheet in Document Management, make notations as to what changes were made, and check back in.

#### Notes:

For adjustments that need to be made to Sharp after final pay calc contact Fiscal Services – District Payroll Clerk/HRP.

Refer to the Crew Card User's Manual on page 121 for more information in regards to the section on Labor Adjustments.

## Workflow

If you want your specialists to be able to approve timesheets in workflow, either have the supervisor send an email to #RWMTeam or you can send the email but CC: the supervisor telling the workflow group specifically who needs to be added to have access to the supervisor's work list. For example, tell them to give Leroy Lewis access to Mark Shumway's work list, etc.

If you want the Equipment Mechanic to have access to the Equipment Mechanic Specialist's work list so he can open 350's, either have the Equipment Mechanic Specialist send an email to #RWMTeam or you can send the email but CC: the specialist telling the workflow group specifically who needs to be added to have access to the EM Specialist's work list. If the EM Specialist does not want the Mechanic to have access to his work list then someone who does have access to the EM Specialist's work list will need to print off the 350's and give them to the Equipment Mechanic in his absence.

As a reminder, when an employee moves within the organization, the employee will still continue to have access to any work list that he/she has been previously granted access to. It is left up to the area/district to monitor the movement of the employee within the organization and notify the workflow group that the respective employee's access needs to be removed.

In Intempo, if a document is exited without hitting the yellow "Release" button then this document will be locked and cannot be replaced by another upcoming version or opened by any other employee. Remind the users if they are not completing a process to get in the habit of hitting the yellow Release button before exiting. This will eliminate a lot of frustration down the road.

If documents continue to exist in a user's work list because they were not replaced and are no longer needed then an e-mail will need to be sent to #RWMTeam either by the supervisor or from the administrative personnel along with the Reference ID's of the documents to be deleted, their document type (i.e. timesheet, fringe, etc.), Date, and Name of the employee(s) that are affected, when appropriate.

By doing a search on a work list, you can only get information back if you had initiated the workflow or been part of the workflow process. To determine whose work list a document may be in you will have to contact the RWM team because they are the only ones that have access to look at all users' work lists.

Refer to the Crew Card User's Manual on page 125 for more information in regards to the section on Workflow Notes.

## Comp Time Notes

1. See attachment "Comp Requested/Comp Earned" dated 11/10/2008 in Crew Card FAQ's as noted in section Finding FAQ's Shared Folder in Outlook.
2. There is no indicator on any table that Crew Card can access to specify whether an employee is receiving Comp Time or Overtime Pay when appropriate. The supervisor must be aware of what option the employee has chosen in order to code the time in the correct column. Note: If time is shown on the Confirmation Report under the CME column this means that comp has been assigned and should be reviewed whether it is correct or not for the respective employee.
3. Comp Time Taken is coded to AC 4880 and will not count towards a 40 hour work week for calculating overtime.
4. If an employee works overtime in the same week that they take Comp Time they will still need to actually work 40 hours before getting overtime. Additional hours worked until the 40 hours is met are paid at the regular hourly rate of pay, not at the 1.5 rate.
5. If the employee has signed the agreement to get Comp Time and then they change their mind later on in the year they can get paid overtime instead by signing another agreement (Form #0083) if they do this before the overtime is worked.
6. If the employee has built up Comp Time and then they decide they want to be paid for overtime they can keep the Comp Time on the books but the Comp Time should be used prior to the end of the fiscal/interim year. Comp Time is not to be considered a savings account. Comp Time is designed to be a benefit for the employee to be used in lieu of their normal leave.
7. The employee may earn a maximum of 27 hours of Comp Time per fiscal/interim year which computes to 40.5 hours of straight time hours that can be used. Comp Time cannot be built back up once they start using it.
8. Once an employee reaches their max of 27 hours in a fiscal/interim year any extra time worked will automatically be paid out as overtime regardless of whether the hours still continue to be shown in the comp requested column in Crew Card or not.
9. The employee may use their Comp Time through the last working day of the pay period of the respective fiscal/interim year.
10. Midway through the fiscal/interim year, Troy Whitworth will be sending out a spreadsheet of employees who have Comp Time on the books. These hours should be used instead of annual or sick leave prior to fiscal/interim year end at which time Comp Time will be paid out for any time not used. Please help review your respective employee's leave to remind them that they should be using their comp time so there is not a huge payout that affects the Division of Operations budget at the end of the fiscal/interim year.
11. At the end of the fiscal/interim year, the Comp Time will be paid out for any comp time not used and the Comp Time hours on Sharp will be reset to zero. Comp Time **cannot** be converted to SL or AL.
12. At the beginning of the next fiscal/interim year the employee may begin earning comp time once again to build up to their 27 hour maximum.
13. The decision to request/accept Comp Time is the employee's decision. But the employer may choose to not agree to give Comp Time and pay the employee instead. If an employee signs the agreement to accept Comp Time, then the only time we would

not agree to give Comp Time would be when the agreement would contradict the Operations Comp Time policy (i.e. the employee has already attained 40.5 hours in the fiscal/interim year, the overtime is in a holiday week, etc.)

## Materials/Adjustments/Transfers

For an open pay period within Crew Card, changes can be made to issues, mixed receipts and/or vendor receipts that have not been processed. These changes can be made through 4:00 p.m. on the Friday following the pay period aka CCFB Friday.

If stock was received into the wrong location based upon an incorrect location on the purchase order then the transfer of materials must be done in CICSP not Crew Card and the new balances will cycle down to Crew Card the next inventory interface which is the Monday following CCFB Friday.

When new inventory balances are brought down to Crew Card any vendor receipt not posted and any new mixed receipts for the current pay period will be added to this balance, and any new issues for the current pay period will be subtracted from the balance. Note: The inventory balance could be incorrect on the Materials Screen and Materials Report if there is an issue that is on ERROR status that did not get processed due to insufficient stock because the receipt(s) did not come along with it.

After the CCFB interface if it is determined that the transaction(s) that have already interfaced and posted to Consumable Inventory need to be corrected because of incorrect quantities or stock location/stock number then you will need to make the corrections in Consumable Inventory (CICSP). The updated balance for the Materials Screen will be brought down Monday through Friday at 4:00 a.m., the Materials Report beginning balance will be incorrect so you should contact Ellen Laird with the stock location and stock number to have the appropriate table updated to reflect your most recent change.

Prior to doing any inventory adjustment records in crew card the System Administrator should be contacted. Adjustment records that have been created in Crew Card for inventory do not interface to the other legacy systems such as CCFB and Consumable Inventory. These adjustments are considered a band-aid to allow for documentation and keep the balances up to date for "only that period" in Crew Card. If a correction (i.e. reversal, adjustment) needs to be made to Consumable Inventory this will have to be done in CICSP.

Note: Adjustments will show up on the Materials Report for the pay period based upon the date. This does not necessarily keep the Materials Report and Materials Screen in sync. There are two tables that are affected CC\_STK\_LOC\_MTRL\_XREF and CC\_STK\_LOC\_MTRL\_PERIOD\_QTY.

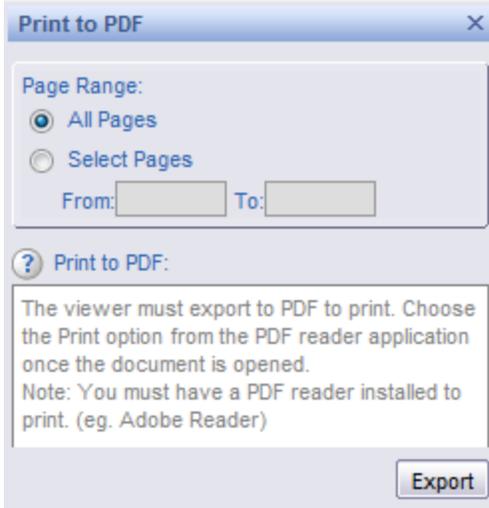
## Reports

You will need to run the following two reports at the end of each pay period:

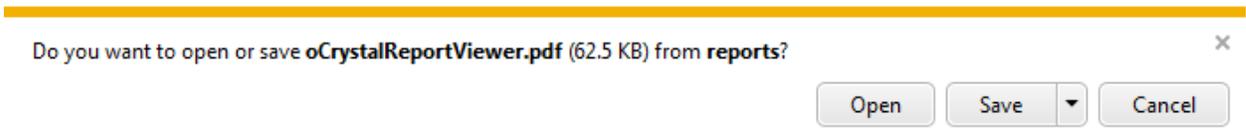
- Confirmation Report
- Group Timesheets – This report only needs to be generated if an employee has terminated prior to the 2<sup>nd</sup> Tuesday of the pay period, see section Timesheet > Notes.

### Directions to get to the reports:

1. Open KDOT Intranet
2. Select “Reports”
3. Click  in front of Crew Card Folder
4. Click on the words “Crew Card Production”
5. Click Run Report/Schedule Report on the same line as the Confirmation Report.
  - a. Note: To print the new timesheet report select Run Report/Schedule Report for the “Group Timesheet” (These look identical to the timesheets sent to workflow without signature)
6. Enter your own employee ID number on the first parameter (i.e. K000012345)
7. Enter Period ending date in the second parameter (i.e. 01/23/2010)
8. Enter org number in the third parameter (DAASS) (i.e. 10104)
9. Click Run Now
10. To print, press the  icon in the upper left hand corner.



11. \_\_\_\_\_ select page range and then click Export



12. \_\_\_\_\_

Click either Open to view the report in PDF format and click File > Print or  icon to bring up the Print Setup window to allow you to make your printer selection and hit the Print button. You can also save the report to a file of your choice.

13. Close the report by hitting the Red X.

Run these two reports prior to the next timesheet Monday:

1.  <a href="#">Timesheets In-Process in Workflow</a>	<a href="#">Hyperlink Details</a>		
--	-----------------------------------	--	--

This report will display all K2 timesheets that are still in an employee or supervisor's worklist regardless of whether they originated from Crew Card or TimeRS.

2.  <a href="#">Timesheets Not In DMS</a> Instance Count: 500	<a href="#">CrystalReport Details</a>	<a href="#">Schedule Report</a> <a href="#">Run Report</a>	<a href="#">View History</a> <a href="#">View Latest Instance</a>
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This report will display whether timesheet(s) do not exist in Document Management (DMS) for a respective district/area/subarea and pay period. Note: Please take into consideration that if a current employee did not have a timesheet in DMS for the respective pay period you are querying that their name may show up on the list.

Currently there is a limit of 15 Crystal Report concurrent licenses which BCS is trying to increase to 30. If they are all being used you may receive the error "it is being used by another process". Try re-clicking on the link to resubmit it once again. Once you schedule your initial Sharp Confirmation Report you can easily reschedule your report for the next time if you normally submit your report around the same time of day each pay period. Per the examples shown below, you will click on the **1)** View History link, **2)** find the previously scheduled report in the list and scroll to the far right of the screen and **3)** click on the Reschedule link. This will bring up the parameter screen with the information populated the last time the report was

submitted and change the appropriate information (i.e. Pay Period End Date and Org), **4)** under the label Destination click on the Add Placeholder drop next for Body: and select Title so the words “Sharp Confirmation Report” will be displayed in the body of the e-mail when the e-mail is delivered to you and **5)** under the label Run Time click on the radio button At a Specified Time and select the Date from the calendar and Time of when you want the report to run next time and click on the Schedule button at the bottom of the form. Note: You would need to set up the reschedule for each subsequent pay period.

1) **SHARP Confirmation Report** Instance Count: 461 [CrystalReport Details](#) [Schedule Report](#)  
[Run Report](#)

2)  [Success](#) SHARP Confirmation Report 3/18/2013 11:05:39 AM

3) [Reschedule](#)

4) **Body:**  [Add Placeholder...](#)

5) **Run Time**  
 Right Now  
 At a Specified Time  
 Date:  

## Timesheet Search

When a timesheet has been completed with all necessary signatures, it is moved into the Document Management System for electronic storage. If you choose to see any completed signed timesheets, you may search the document storage for them.

You can find the workflow timesheets that have finalized and are filed in Document Management a bit easier.

1. Open KDOT Intranet
2. Click on Document Management System
3. In the middle column under Personnel Library, click "Searches"  Searches
4. In the right column, click "Search Timesheets."
5. You can put in criteria to find the timesheet desired

You can enter a date, or select the drop down arrow on the far right of the Effective Date to select a date, or leave blank to access all pay periods. Wildcards (\*) can be used in conjunction with the Employee Name parameter to search for a partial name, enclose the letters in asterisks (i.e. \*lai\*). If you know the entire name enter it as it appears on the timesheet enter it without the wildcard. In the SHARP Employee ID parameter if you know the Sharp # then you can enter that data as well. Or you can enter all 3 parameters.

You can only view timesheets to which you have security. For most of us, this search will only return our timesheets because we have no access to anyone's timesheets but our own. District Personnel Clerks and District HRPs should have security to all employees in their district. Area Office Managers and back-ups should have security to all employees in their area.

Note: If the max results are not set high enough then you might not be bringing in all of the rows.

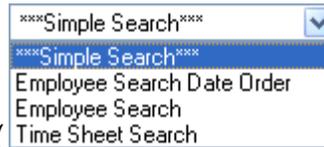
## Supervisor Emergency DOT 244 Search

1. Open KDOT Intranet
2. Click on Document Management System



3. On the left, click Personnel Library.

4. On the top toolbar click on the Search mode button 



5. Click on drop down box arrow (  ) and select Employee Search
6. Click on white area in Document Class, click on drop down arrow to select Timesheet File
7. Enter wildcard name with asterisks such as **\*wolf\*** in the Employee Name area or enter Sharp Employee Id in the SHARP Employee ID area

8. Click right sided triangle next to Employee Search 

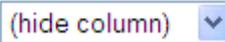
A screenshot of a search criteria form. At the top, there is a toolbar with various icons. Below the toolbar, there are three rows of search criteria. The first row is "Document Class is equal Timesheet File". The second row is "Employee Name like \*wolf\*". The third row is "SHARP Employee ID is equal". Each row has a text input field on the right side.

9. Click the radio button next to the desired Emergency Work document that is brought back based upon on your search criteria.

## Setting Preference ID's in Intempo

1. Open KDOT Intranet
2. Click on Forms Warehouse
3. Click "My Worklist"
4. Click "Preferences" tab 
5. Under Work List Preferences select the first hide column available across the page.

Note: my first available hide column was under Instructions.



6. Click on the drop down box for next to the (hide column) and change to Ref ID



7. Once selected the value Ref. ID should appear in the box 
8. Press the Update Preferences button located in the center towards the top of the screen



9. After you have pressed the Update Preferences button a note will appear in red "Your preferences have been updated". 

By having the Ref. ID as a preference this will assist you if specific document(s) have to be cancelled by the #RWMTeam.

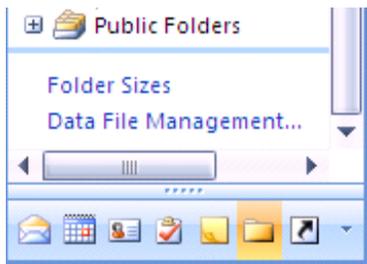
## Finding FAQ's Shared folder in Outlook

To obtain a list of Questions and Answers in regards to Frequently Asked Questions (FAQ's) in Crew Card, a Microsoft Outlook shared folder has been created to allow Ellen to record this information. Please review this information to see if it will quickly help resolve your question(s).

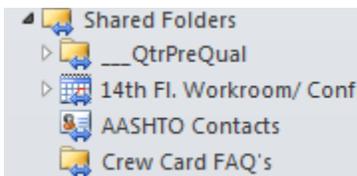
1. In your email, at the bottom on the right , you will see a folder icon, shown highlighted in orange – 2<sup>nd</sup> from right, to take you to the “Folder List”



2. When you click on this folder button, you will see in your folder list at the very bottom “Public Folders”



3. Click the ▸ sign in front of **Public Folders**
4. Then click the ▸ sign in front of **All public Folders**
5. Then click the ▸ sign in front of **Shared Folders**
6. Then click on **Crew Card FAQ** which is part way down the list



7. Once you have obtained the Crew Card FAQ folder right click on the actual folder and chose “Add to Favorites”
8. Then the next time you want to access this FAQ it will be listed under Public Folders à Favorites. Note: This will save some “digging” time.

See screen shot below of list of sample FAQ's that have been stored.

Crew Card FAQ's		Search Crew Card FAQ's		
From	Subject	Received	Size	Categ...
Ellen Laird	Holiday Week Emergency Events aka DOT 12's	Thu 1/14/2010 10...	22 KB	
Date: Older				
Ellen Laird	Fringe Benefits for 2010	Tue 12/15/2009 9...	11 KB	
Ellen Laird	Fringe Declaration for 2010	Mon 12/14/2009 ...	6 KB	
Ellen Laird	Voucher Description Page Example	Fri 11/13/2009 11...	46 KB	
Mark Morrison	Task NR Policy Update	Thu 11/5/2009 1:...	154 KB	
Ellen Laird	RE: ACTION_DT in SHARP	Tue 11/3/2009 12...	16 KB	
Ellen Laird	Form 244 - Supervisor Unscheduled Emergency Work Documentation	Tue 10/6/2009 3:...	161 KB	
Ellen Laird	Equipment Scheduled Maintenance	Mon 9/21/2009 1...	53 KB	
Ellen Laird	Timesheets for those on extended leave//Vendor Receipt Tickets	Fri 9/11/2009 2:3...	12 KB	
Ellen Laird	Activity 751 versus 350 Requests	Tue 8/25/2009 9:...	28 KB	
Ellen Laird	Setting Preference of Reference ID	Mon 8/17/2009 1...	127 KB	
Ellen Laird	RE: Crew Card Adjustments	Fri 7/31/2009 2:3...	9 KB	
Ellen Laird	RE: FY10 Project Coding	Mon 6/15/2009 1...	8 KB	
Ellen Laird	Equipment Repair List	Wed 5/27/2009 9:...	240 KB	
Ellen Laird	350 Requests (Oil changes and Service Checks)	Tue 4/14/2009 9:...	36 KB	
Ellen Laird	Microsoft Outlooks Rules - Unlocked Time	Tue 3/10/2009 2:...	281 KB	
Ellen Laird	How to access 350 requests that have been saved in Document Managem...	Fri 2/27/2009 10:...	696 KB	
Mark Morrison	FW: Signatures on Employee Timesheets	Thu 11/20/2008 1...	3 KB	
Ellen Laird	RE: Comp Requested/Comp Earned	Mon 11/10/2008 ...	3 KB	
Ellen Laird	Documents to be deleted from workflow	Tue 11/4/2008 11...	3 KB	
Mark Morrison	Overtime and Compensatory Time Policy's for Operations	Wed 10/29/2008 ...	5 KB	
Ellen Laird	Emergency Time - 731	Mon 9/15/2008 4...	3 KB	
Ellen Laird	Equipment now showing up for Activity 751 or 350 Requests	Mon 9/15/2008 1...	5 KB	
Ellen Laird	Equipment not showing up in Equipment (Utilized) Grid	Mon 9/15/2008 1...	5 KB	
Ellen Laird	Employee does not have access to any crews	Thu 8/21/2008 1:...	5 KB	
Ellen Laird	AOM - What if the vendor bills at a different rate than the unit price on th...	Tue 8/12/2008 3:...	3 KB	
Ellen Laird	Emergency Work in a Holiday Week	Wed 7/16/2008 4...	15 KB	

## Other FAQ's

Q: Why is my **employee not showing up** in the Labor Grid?

A: Please address the following three questions to determine what the problem may be. **1)** Is the effective date and "Report To" Supervisor's K number correct on Sharp, **2)** has the Form 020 been processed all the way through and/or **3)** is the OBSE value on the Position table a valid maintenance OBSE number?

Q: Why is my **equipment not showing up** in the Equipment (Utilized Grid) on the Activities Tab?

A: Please check the following four items: **1)** Does the equipment have the correct DD-AA-SS location that matches the supervisor's DD-AA-SS location, **2)** Is the status 'ACTIV' on the Capital Inventory Equipment Table, **3)** Does the equipment have a meter unit of 'H' (hours), 'M' (miles) or 'B' (both miles and hours), and/or **4)** Has a life to date record been built on the Equipment Management System (EMS) from charges such as fuel, shop supplies, labor for set-up, etc. based upon a work order.

Q: Why does **employee not have access to any crews**?

A: There are seven items to be checked when determining why an employee does not have access to any crews, they are as follows: **1)** Has the Crew Card application been installed properly on the user's machine with all of its components (i.e. KDOT-AZMAN, KDOT-Oracle, Crystal Reports 2.0 .Net Framework, Crystal Reports Basic Runtime for V2008, etc.), **2)** Has a request been made to #IIS\_Support that the employee be put in Azman, **3)** Has the employee been delegated by the supervisor, **4)** Is the Active Directory Name on the Oracle Employee Table valid...have the Crew Card System Administrator check this for you, **5)** Is the OBSE of the employee a valid maintenance OBSE, **6)** Has the DTNT password of the employee expired, and/or **7)** If an administrator, has the employee been moved out of a workflow role...have Crew Card System Administrator check this for you.

Q: Is there a way to find out if the **dollar amount of a vendor receipt item is correct** in crew card?

A: Crew Card keeps track of the quantity and unit price off of the purchase order. The dollar amount calculation is not done until the time of the CCFB interface when it multiplies the vendor receipt quantity \* unit price off of the purchase order on the day of the interface. This is why it is imperative that the unit price from the purchase order matches what the unit price the vendor is charging us or the dollar amount will not be calculated correctly. If the unit price has changed and vendor receipt transactions for this purchase order have already interfaced to CCFB and posted to Consumable Inventory then the receipts on Consumable Inventory will need to be reversed by Ami Fulghum.

\*Note: Do not include the demurrage or pump charges in the unit price calculation. Create a separate line for the actual stock item and overhead charges below the stock item when paying the invoice.

Q: Does Crew Card do **Transfers**?

A: Crew Card does not transfer materials in Crew Card. This is only done through the old CICSP Consumable Inventory. If a crew mixes some salt and sand they can “put” it into another stock location that they have access to on the Mixing tab, but the transfer of all other materials must be done through CICSP.

Q: On the **materials Tab** you are asked to record what you used. It doesn't let you charge out a half a ton, so can you only charge out whole tons for material?

A: Yes. You can only issue material in whole tons just like CICSP, even though when you are receiving the stock into crew card you enter “Receipt from Vendor” tickets up to four decimal places.

Q: A supervisor manages a **stock location located in a different county**. The stock location was borrowed in order for it to show up in the respective supervisor's list. When receiving stock at this location the borrowing supervisor does not see the vendor receipt in his list because he is not the owner of the stock location. What needs to happen?

A: The borrowing supervisor cannot post receipts in Crew Card to a stock location that he shares. He would have to be made the owner of the location in order for him to have access to the purchase order in order to post the receipt(s). This would be up to the district as to whether they want to make this change. So the actual owner of the location will have to enter the receipts or they may ask the AOM to assist them in this instance to prevent having to mail receipts from one location to another and then to the area office.

Q: What happens to **materials at year end**?

A: On the evening of June 30<sup>th</sup> any material transactions from the start of the open pay period through June 30<sup>th</sup> will be interfaced from Crew Card to CCFB and then posted to Consumable Inventory. The respective material transaction(s) for those days will then be locked and no other material changes can be made. The material transaction(s) for the remainder of the open pay period will interface on the normal processing schedule. During the remainder of the Consumable Inventory freeze period (as set forth by Fiscal Services and after June 30<sup>th</sup>), any receipts that still need to be posted to June 30<sup>th</sup> will need to be made in the old CICSP Consumable Inventory system and contact Ami Fulghum if any questions arise.

Q: Do I need to do anything to an employee's timesheet who is on **Military leave**?

A: No, he is on a military leave of absence and not in pay status. Remember, you are only entering time for employees that have worked or are using some type of leave that would require being paid for.

Q: Where do I record information about the **Safety Meeting**?

A: Record the information about the Safety Meeting in the comment box on the Work Description page for Activity 711 and those comments will be reflected on the Safety Report under the Crystal Reports Tab.

Q: I need to have **equipment removed from the list** and another added. We traded equipment with another District.

A: Please contact your Capital Inventory representative for your district/area to have them change the DD-AA-SS location of both pieces of equipment. Remember this will take one business day to cycle down to Crew Card once the change has been made in Capital Inventory.

Q: A supervisor in a sub-area keyed 10 hours for one day for flagging high water last week and the employee took his time off on Friday, so he entered 6 hours for Friday, the week adds up to 40 hours. So it's **red flagging hours** because he doesn't show 8 hours on Friday.

A: The employee is supposed to show the time like he worked it. The alert is to keep the supervisor in check in case he forgot to key something...in this case it is fine.

Q: A sub-area entered miles/hours to a piece of equipment that another sub-area borrowed, but he won't show any labor hours since it was not his guys running it, so he's getting **flagged that there are no labor hours**.

A: If the area/district has made the decision to not allow the borrowing sub-area to record time against the respective piece of equipment then the equipment time will need to be shown at the owning location and the labor will need to be shown at the borrowing location. You may want to put in a comment as to why there is no labor associated with this equipment at the owning location and a comment at the borrowing location why there is no equipment with the labor.

Q: What activity do I use to **haul new equipment**?

A: Use Activity 752, Work Description of "Other – Defined in Comments" to record hauling a new piece of equipment.

Q: How do I report hours **worked on a holiday that are not part of an Emergency Event**?

A: If hours are worked on a holiday that is not considered part of an emergency event (i.e. travel to airport or training site), these hours will be coded in the REG column of the labor grid.

Q: How do **exempts report time for Activity 521 Task 10**?

A: Based upon the policy that is currently written, the exempt supervisor will code to Activity 521 Task 10 during regular hours of a snow and ice event when acting as an equipment operator.

Q: How is the **Form 244 Supervisor Emergency Workflow** populated and what approvals are required?

A: It is populated from the data that is entered into AD-EM for the exempt employee on Crew Card. This form is sent directly to their supervisor in workflow when the timesheet is sent. Highway Maintenance Superintendents and/or Area Engineer approvals are required. District Engineers will be notified but will not sign the form.

Q: When can time be recorded in the **AD-EM column**?

A: Exempts can fill out time in the AD-EM column any day of the year that there was a true emergency outside of their normal business hours. Non-exempts can only fill in time in the AD-EM column if it is in a holiday week and a holiday event has been created.

Q: If someone goes on **Jury duty, they are given a note by the courts**. We generally attach that note to the timesheet so we will have it for auditing purposes. How do we do this now?

A: We have no way to do this directly in Crew Card, however, when the timesheet gets to Workflow, you should scan the note in and add it as an attachment prior to the employee/supervisor signing the timesheet.

Q: When my crew works on QA, **work hours are re-arranged** as this is non-emergency work. Will this change?

A: The current provisions of Federal and State laws and regulations and the KOSE MOA allow us to re-arrange workweeks to maintain a minimum of 40 hours in pay status in a workweek. The District Engineers have agreed to the practice of only using rearranged workweeks for non-emergency work.

Q: Who is the **1st level approval**?

A: You are 1<sup>st</sup> level approval to anyone who answers directly to you. Supervisors are 1<sup>st</sup> level for their crew. Superintendents are 1<sup>st</sup> level for the employees that report directly to him/her (i.e. heating and air guy), no supervisors.

Q: Who is the **2nd level approval**?

A: The Superintendents are 2<sup>nd</sup> level approvals for the Supervisors they supervise.

Q: The **Superintendent is the 2nd level approver** – but does he ever have to actually sign timesheets for the crews (other than his supervisors?)

A: The superintendent only has to sign timesheets for the employees who report directly to the superintendent (i.e. heating and air guy) or the supervisors that report directly to the superintendent.

Q: When the mechanic opens a **350** and saves it, then workflow e-mails him, can he delete that e-mail? The superintendent gets an e-mail when our mechanic receives a 350, does he get one when it's completed?

A: The mechanic can delete the e-mail if he prefers to access the 350's from his work list. The superintendent gets an e-mail when the 350 is created and again when the 350 is completed.

Q: Will the **other mechanics get an email** with a link to the workflow list of the main mechanic? Or how do the mechanics get to the workflow list if they don't receive an email link to it?

A: The backup mechanic will not get an email with the link to the work list of the main mechanic. If the backup mechanic has access to the main mechanic's work list he would go into Forms Warehouse, click on "K2 Worklist", then there will be a drop down list for him to pick the person whose work list he is trying to get into. Once he makes the selection he can then see what is in that individual's work list.

Q: Why was a **350 request not replaced in Intempo by an updated 350** that was initiated this morning?

A: The mechanic had opened the original 350 request via "My Worklist" (i.e. Intempo) which locked it. He then closed his browser without releasing the lock by hitting the yellow release button. When the replacement 350 request came through it tried to terminate the prior request but could not because it was locked.

Q: What does the mechanic have to **populate on a 350 request?**

A: The mechanic can record notes on the left side of the 350 request but they can be overlaid if the supervisor resubmits a 350 request. When the 350 request has been completed the mechanic will populate the 359 work order number, date completed, change the status to complete and hit submit. If the work was done by an outside shop the mechanic will check the box for "Repair done by outside shop" and hit submit. If the request did not need to be completed then the request will be marked as cancelled and hit submit. When the 350 request has been finalized the workflow process will update the Crew Card side and mark the request as being completed or cancelled depending upon the circumstance.

Q: Who enters the **intervals for EQ oil changes** and such into the mainframe?

A: Check with Tim Cunningham at HQ or your District Shop Supt.

Q: What does the mechanic do when a piece of **equipment needs to be taken out of use** (dead-lined, red-flagged, etc?)

A: If a 350 request has been submitted by the supervisor the 350 request will stay in the mechanic's work list and should be shown completed when the equipment is repaired. If the equipment is eventually taken out of service permanently the 350 request should be cancelled by the mechanic so it will be removed from his work list. The mechanic will need to notify the appropriate personnel that the equipment can no longer be used.

Q: Why is my **Add Activity Button disabled**?

A: The Add Activity Button will be disabled for three reasons, they are as follows: **1)** A project and/or activity has not been selected, **2)** The supervisor has approved all three portions of the data (labor, equipment and materials), and/or **3)** the pay period is closed.

Q: Why is my **Add Equipment Button disabled**?

A: The Add Equipment Button will be disabled for three reasons, they are as follows: **1)** until a project has been built and/or highlighted it cannot be selected, **2)** The supervisor has approved the equipment, and/or **3)** the pay period is closed.

Q: Why is my **Add Materials Button disabled**?

A: The Add Materials Button will be disabled for four reasons, they are as follows: **1)** Until a project has been built and/or highlighted it cannot be selected, **2)** The supervisor has approved the materials, **3)** the pay period is closed and/or **4)** the year end process has been run for materials and data through June 30<sup>th</sup> and therefore can no longer be modified.

Q: **Why can't I find a project** via the Search Project screen in Crew Card?

A: Only projects with a status of 'ACTIV' or 'COMPL' in WinCPMS are brought down to Crew Card.

Q: When will the **old FY projects that I can't remove myself roll off of my list of projects**?

A: If a project location (DD-AA-SS) matches the supervisor's location (DD-AA-SS) then this is considered a default project and it cannot be removed from the list. When projects are restaged during mid June of each year then the projects with a stage of the current calendar year will remain enabled until the respective projects are changed to a 'CLOSE' status in WinCPMS. This event normally occurs late August.

Q: I ran a Crystal Report, and then made a change on Crew Card but the **change was not reflected on my new Crystal Report** that I just reran, why?

A: Crystal Report may take anywhere from a couple of minutes to twenty minutes to refresh. If after twenty minutes you don't see your change reflected contact Vivian Liu at (785)296-4248.