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TACS



# **TACS: Time and Attendance Collection System Supervisor Training**

## **Facilitator's Guide**

**Course 31267-01  
February 23, 2001**

Finance  
**Payroll**



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TACS

## **Use of Training Materials**

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## **CONTENTS**

<b>TACS TRAINING GUIDELINES</b>	<b>3</b>
<b>MODULE ONE -- INTRODUCTION</b>	<b>15</b>
<b>MODULE TWO - LOGGING IN AND NAVIGATING IN THE TACS APPLICATION</b>	<b>27</b>
<b>MODULE THREE – THE CLOCK RING EDITOR</b>	<b>39</b>
<b>MODULE FOUR -- USING TACS TO MONITOR EMPLOYEE PERFORMANCE</b>	<b>78</b>
<b>MODULE FIVE -- TACS AND THE ELECTRONIC BADGE READER</b>	<b>96</b>
<b>APPENDICES</b>	<b>130</b>



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TACS TRAINING

## TACS TRAINING GUIDELINES

Time and Attendance Collection System (TACS) training is intended to facilitate the use of TACS once it has been deployed. TACS training consists of 4 classes, each class delivered in a computer lab and addressed to a particular group of users.

Web technology provides an opportunity for supervisors to more easily monitor their employees work hour and leave usage and to make necessary changes quickly. TACS Supervisor Training, course number 31267-01, is intended for supervisors and other personnel who will need access to the Clock Ring Editor. In addition to showing particular reports that will provide them with near real-time data that will facilitate supervision, TACS Supervisor Training provides supervisors with practice in using the Clock Ring Editor module, and in using the Electronic Badge Reader (EBR). It will also provide supervisors with information about TACS and changes to the EBR software that they will need to share with their employees. A training database is utilized so that TACS exercises can be performed without recourse to the local TACS production database.

Reports Training, course number 31267-02, is intended for users who need to use **only** TACS reporting features. It introduces the timekeeping system, explains how to log-on and navigate in the web environment, and walks through some of the varied reports available from TACS. Users who will only print and read reports, and who will not need write access to TACS, will need only Reports Training. Reports Training should be delivered soon after conversion to TACS using the local TACS production database for examples rather than a training database.

TACS Time and Attendance Clerk Training, course number 31267-03, is intended for craft timekeeping employees. **The Supervisor Training class, 31267-01, is a prerequisite for this class.** These users will have update access to other TACS modules in addition to the Clock Ring Editor, including Employee Maintenance and Badge Maintenance, so that they can continue to support performance cluster timekeeping activities.

District Coordinator training, intended for district TACS Coordinators, encompasses the previous 3 classes plus some additional time to learn all of the TACS modules, including how to set up user accounts, how to control access, etc. During the 3 1/2 day class, course number 31267-04, which is delivered by Headquarters trainers approximately 14 weeks before the district cuts over to TACS, Coordinators will also receive poller overview training, training on the Cut Over Checklist and Implementation Guide, and troubleshooting training.

### **Pre-TACS Training**

Since the TACS application is accessed from a personal computer using Internet Explorer, it is very important that trainees have a fundamental understanding of how to navigate the intranet prior to TACS training. Many postal employees are computer literate, and already possess this fundamental understanding. Nevertheless, it is recommended that prospective TACS users, especially in districts that are still supported by PSDS, be offered an opportunity, based on self-assessment, to attend overview training in Windows '95 and in Internet Explorer prior to attendance in TACS training. This training should be arranged and paid for locally.

In addition to basic computer skills training, Course 21564-00, "Time is Money: Time and Attendance for Supervisors," should be delivered to supervisors prior to TACS training. This 4-hour class delineates supervisory responsibility for employee time and attendance and effectively provides a context for the supervisors' assumption of TACS duties.

**Post-TACS Training**

After the local TACS production database becomes available, and after the initial TACS training has been delivered to all TACS users, there will be a need for additional training. Some TACS users will need to receive additional training and coaching before they become proficient. Many, if not all, of the supervisors will need training in time and attendance rules and regulations so that the information entered into the TACS database is correct and reliable. Newly promoted individuals and detailed employees will need to be trained both in TACS and Time and Attendance regulations.

Working with the local PEDC, the TACS Coordinator must ensure that training facilities remain available, perhaps scaled-down in size, to accomplish post-TACS implementation training. Fundamentals of Time and Attendance, currently under development and not yet assigned a course number, will be used to record post-implementation TACS-related training, both in time and attendance regulations and policies as well as in the TACS application.

As in pre-TACS training, this training is arranged and paid for locally. The time allocations in this post-TACS program will vary from site to site, according to local user needs.

### TACS Trainers

TACS training, with the exceptions of District Coordinator and maintenance training, is delivered by local trainers. These trainers should be recruited primarily from the two large pools of users—Customer Service (CS) and Processing & Distribution (P&D) Supervisors. Trainers should be selected using the following criteria:

- Instructional skills (as demonstrated by FIW certification)
- Computer proficiency (NO computer-phobic instructors)
- Knowledge of Time and Attendance policies & regulations

It is desirable to select trainers from different tours and/or facilities, so that they can be an on-site resource for supervisors after the conversion to TACS. **CS and P&D classes should be offered independently.**

All TACS training is to be delivered by two instructors: one delivers the information while the other circulates around the room assisting users. Timekeeping expertise is helpful in all of the training, but it is critical in the TACS Time and Attendance Clerk training. If PSDS Technicians are willing and have a positive attitude, they may serve as a second instructor in any of the TACS training classes. Other employees who are strong on instructional skills and computer proficiency (i.e., PEDC personnel, other Finance personnel) may also instruct, but they must be partnered with instructors strong on Time and Attendance. All local trainers (at least the ones who will be instructing and leading discussions) must be certified in the two-day Facilitative Instructor Workshop (FIW) course.

The local instructors are trained by Area-designated master trainers in a 4- to 5-day train-the-trainer class (course number

31267-99), usually delivered 4 weeks prior to conversion. Then the local users are trained by these local instructors. An Area master trainer will return or stay to observe the first two classes of user training to ensure that the local trainers are comfortable with the materials and are instructing effectively.

The first four days of the Train-the-Trainer focuses on TACS Supervisory Training. One pair of local instructors will be designated as the Reports Training Instructors. These individuals will teach back the Reports Training while the rest of the participants teach back the Supervisor Training on days 3 and 4 of the Train-the-Trainer.

Another pair of instructors, very knowledgeable of T&A rules, need to be designated as the TACS T&A Clerk Training instructors. On Friday of the TTT week, they will work with the Area Master Trainers so they can deliver this 4-hour program.

After the TACS cut over, the trainers will be an important resource for the TACS users. They should be used as local coaches/ambassadors, making sure that slower learners receive the assistance they need.

Training hours and travel expenses incurred in delivering and attending any of the TACS training (course 31267) may be charged to Headquarters finance number 66-0650, DA 19-0, LDC 88 or 89. However, expenses incurred in providing overview training in Windows '95 and Internet Explorer, in delivering Time is Money training, in delivering TACS Follow-On Training, and in certifying instructors may not be charged to that finance number.

**Training Time Allotments**

Training time in ETC sites will be shorter than in PSDS sites. The following matrix may be used to estimate training times.

	ETC	PSDS
Reports Training	2.5 hours	3.5 hours
Supervisory Training	7 hours	8 hours
TACS T&A Clerk Training	2 hours	4 hours
District Coordinator Training	28 hours	28 hours

**Course Synopses**

Supervisory Training equips supervisors to use TACS to discharge their timekeeping responsibilities. The sequence of learning is based on how supervisors should use TACS on a daily basis. The supervisor's day normally will start with his generating the Clock Ring Error Report, and then fixing the errors. After familiarizing participants with logging in and navigating in the TACS application, the Clock Ring Editor is introduced. Supervisors are led through exercises which demonstrate how to add clock rings, change clock rings, add higher level, authorize overtime, and add annual leave and sick leave. Participants are then introduced to the three reports they will run on a daily basis: the Clock Ring Error Report, the Hours Inquiry Report, and the Unauthorized Overtime Report. After completing additional exercises designed to increase their skill in using the Clock Ring Editor and the three reports, participants are shown some of the other reports and modules in TACS that they will find useful. They are finally shown how to enter data into TACS using an Electronic Badge Reader, and are provided with information to share with their employees regarding changes to the EBR.

Reports Training begins with a brief overview of TACS and why the Postal Service is implementing it. Then, as it is explained to them, participants will log on and navigate around the training database, accessing Help and other key TACS screens. Different report parameters by which information can be sorted are identified, and a few reports are examined in some detail. The Hours Inquiry Report, the Employee Listing Report, and the Station Summary and LDC/Operation Summary Reports are accessed and discussed. The fact that this training uses the local production database will make the reports much more meaningful for participants.

The TACS Time and Attendance Clerk training is delivered to timekeeping employees the week of conversion to TACS. They will be shown how to perform their timekeeping duties using TACS. They will have access to employee master files, badge maintenance, and to PP/WK Hold. They will also be shown reports that are particularly useful in discharging their duties. After they are trained, they will be equipped to assist the TACS Coordinator in making sure the employee files are accurate and complete and that the local TACS production database is ready.

### **Workshop Materials**

All training materials are to be downloaded from the TACS Web page, and duplicated locally. They are accessed by clicking on the "Coordinator" button and then on the "Downloads" link. These materials must be saved to a local computer in order to print them: they cannot be printed from the web page. Duplication costs may also be charged to finance number 66-0650.



**Course Number 31267-01**

- TACS Supervisory Training Facilitator's Guide
- TACS Supervisory Training Participant's Workbook
- TACS Report Packet
- F-401 – Supervisor's Guide to Time and Attendance--  
(Pocket-sized versions should be ordered from the  
Material Distribution Centers)
- Training Power Point File --(Used in Introduction, if  
desired))
- Generic Clock Ring Error Reports to be used in  
exercises

**Course Number 31267-02**

- TACS Reports Training Participant's Workbook
- TACS Report Packet
- Training Power Point File --(Used in Introduction, if  
desired)

**Course Number 31267-03**

- TACS Time and Attendance Clerk Training  
Participant's Workbook
- F-401 – Supervisor's Guide to Time and Attendance--  
(Pocket-sized versions should be ordered from the  
Material Distribution Centers)

**Facilities and Equipment Needs**

- Training should be delivered in a computer lab environment,  
with 16 terminals--15 for participants, 1 for the instructor.
- Minimum computer requirements are pentium 166 with at least  
64 mgs of RAM.

- Each terminal must have LAN access, access to Internet Explorer, and have Oracle Jinitiator 1.17.18 loaded on it.
- Each trainee should use his/her own terminal. Avoid doubling up.
- Electronic badge reader with TACS software loaded. (ETC software may be used, if necessary.)
- Sample type 1 (permanent regular), type 2 (permanent authorizer), and type 9 (vehicle) badges
- At least one rip chart
- 1 computer screen projector
- Local network printer

### Recommendations for Trainers

Class size is limited to 15 trainees, and two facilitators should share the instruction. One of the facilitators will be the main presenter who will deliver information and instructions, lead discussions, and pace the training ensuring that all of the modules are covered. The other facilitator will circulate among trainees providing technical assistance and coaching slower learners. The second facilitator should also identify trainees who already have good computer skills so that they can be a resource to slower learners in the classroom.

On Day One, the facilitators need to arrive at least 45 minutes before class begins to ensure computers are working and can launch TACS, and to set up the computer projector.

Throughout this Guide, page references to the Participant's Workbook are included, i.e., (PW,3). *Notes addressed to the facilitator are italicized and do not appear in the Participant's Workbook.* **Notes in bold print are important and should be**

**read aloud to participants and emphasized.** Instructors should avoid reading from the Facilitator's Guide, but should make sure the information is delivered, preferably in the instructor's own words.

### **Training Database Support**

The TACS training database differs from the TACS production databases in a couple of significant ways. All of the employee clock rings were programmed into the training database, whereas, in the production databases, they come from EBRs. As a consequence, some reports are not available in the training database. Reports about badge usage, for example, cannot be produced from the training database.

The training database is frozen on pay period 5, FY 2000, with both weeks of the pay period open. The training database is set up to refresh every Sunday: all of the clock rings entered during the week disappear, and the database returns to its original preprogrammed state. **For this reason, training cannot be scheduled for Sundays.** Thus pay locations and the employees assigned to them are available for use once each week. Because the weeks don't progress as in a production database, archive reports and reports, like the FLASH Reference Report, which depend upon a closed week, are not available in the training database.

The training database is used primarily to support Supervisor Training. The local trainers will use Customer Service pay locations (finance number 47-4632, pay locations 001-016) to train supervisors from stations and branches, and Processing and Distribution pay locations (finance number 47-4634, pay locations

101-116) to train plant supervisors. Each class uses a different pay location.

Each of the 16 pay locations in 47-4632 (Customer Service) has 15 regular carriers (13-4), 5 PTF carriers (43-4), and 5 clerks (11-0). Each of the 16 pay locations in 47-4634 (Processing & Distribution) has 15 regular clerks (11-0), 5 PTF clerks (43-4), and 5 mail handlers (12-0). When the class is performing the clock ring editor exercises in module 3, each participant is assigned one of the 15 regular employees to work on, and is given a generic clock ring error report to use.

After correcting their employee's built-in errors for week 1, the class is divided into 5 groups. Each group is then assigned one PTF and one clerk (47-4632) or mail handler (47-4634), and is given generic clock ring error reports for these employees so that they can correct, as a group, built-in errors for week 1, and run appropriate reports.

The instructor should use, for demonstration purposes, an employee with the same errors as those employees assigned to the class. If there are fewer than 15 participants in the class, the instructor may use one of the regular employees in the class pay location. If there are 15 students in the class, the instructor should use a regular employee from pay location 980 in either finance numbers. **If there are not enough demonstration employees in pay locations 980 and the classes are full, don't save rings and you will be able to re-use the demonstration employee for classes later in the same week.** The demonstration employees, like all the other employees, revert to their original errors every Sunday when the database is restored.

The Area TACS Coordinator, or a designee, is responsible for managing the use of the training databases within the Area. Each Area is assigned 2 databases to support training within that Area. **It is very important that all users of the training database log in correctly to their assigned databases: logging in incorrectly will adversely affect database users in other Areas.**

An alpha add-on to the TACS database login ID will bring users to the copy of the database reserved for them. There are 40 login IDs for each copy of the database. The IDs will be TACS001a, TACS002a, TACS003a, and so on through TACS040a. The next copy of the database will use login IDs TACS001b through TACS040b. There will be no IDs using the alpha "s" designation (i.e., TACS001s). The database name will always be TACSTRN6 or TACSTRN8. The password is TRAIN.

AREA	DATABASE INSTANCE
Allegheny	A,B
Cap Metro	C,D
Great Lakes	E,F or G
Mid-Atlantic	G,H
Midwest	<del>I,J</del>
Northeast	K,L
NY Metro	M,N
Pacific	O,P
Southeast	Q,R
Southwest	T,U
Western	V,W

Headquarters will keep three databases (copies X, Y, and Z) to supplement the Area databases, when they convert large sites.

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TACS TRAINING

## **MODULE ONE -- INTRODUCTION**

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TACS TRAINING

*Have rip chart near door of classroom with "Welcome to TACS Training," neatly written on it along with instructors' names.*

- ✓ *Welcome students*
- ✓ *Facilitator Introduces Self*
- ✓ *Ask participants to briefly introduce themselves.*

*Do a quick needs assessment by asking participants to complete page 5 in their Participant Workbook to identify position, years in position, whether they have a personal computer (pc) at home, and how they use the internet. Pay attention to the computer experience of participants as this will help identify individuals who may be able to help others and others who may need help themselves.*

*Option: Pairing participants and having them introduce one another helps break the ice.*

## **PARTICIPANT INTRODUCTIONS (PW,5)**

Position

Years in position

Years of service

Do you use a computer, either at work or at home?

How?

*After introductions have taken place, the instructor gives an overview of TACS.*



**ABOUT TACS (PW,6)**

The USPS Payroll System, supported and processed at the Minneapolis Information Systems and Accounting Service Center, currently has five applications that collect time and attendance information for payroll purposes. These applications are:

City T&A Processing System	CTAPS	Time Cards - Mainframe Based
PC City T&A Processing System	PCCTAPS	Time Cards - PC Based
Rural T&A Processing System	RTAPS	Time Cards - Mainframe Based
Electronic Time Clock System	ETC	Automated - PC or LAN Based
Postal Source Data System	PSDS	Automated Mainframe Based

The Time & Attendance Collection System combines the functionality of the ETC, CTAPS, PC-CTAPS & PSDS systems into one standard and automated time & attendance system for all Postal Service offices. The hardware and software of TACS are highly reliable and similar in configuration in all sites so centralized support units can maintain the application. In a later phase of TACS, rural timekeeping will also be performed in the TACS application.

*TACS is a web-based system: it provides access to an Oracle database through the USPS intra-net. By converting TACS from a client-server environment to web-based, the Postal Service is using "cutting edge" technology. The only sacrifice in converting to the web is the loss of some processing speed exhibited by programs, like ETC, which exist in a client-server environment. However, as web technology continues to improve, TACS processing speed will improve as well.*

As in all timekeeping systems, payroll data is considered sensitive and must be secured from unauthorized access. **TACS does**

**not change timekeeping policies and procedures:** it rather provides a more efficient, less expensive vehicle for the execution of those policies and procedures.

*After giving a brief overview of TACS, ask "Why Move to TACS?"  
After soliciting participant ideas, ask students to turn to their workbook for a description of the functionality and benefits of TACS.*

### **FUNCTIONALITY & BENEFITS OF TACS: (PW,7)**

1. System of national scope.
  - Improved functionality over current systems.
  - ETC will not support the 20 largest postal sites.
  - Capable of standardizing data collection and Time & Attendance across the country. TACS will support every office in the Postal Service replacing all timekeeping systems.
- ② Improved Security
  - Larger number of data access authorization levels: 110 in TACS, 49 in ETC, none in PSDS.
  - Badge control built in to identify employees having multiple EBR badges.
  - Instant deactivation of lost or terminated badges.
  - Authorizations for future actions (e.g., higher level, scheduled leave) up to three weeks in advance.
3. Access to information.
  - Data can be input and retrieved from any Postal computer workstation, anywhere, that has access to the postal intra-net.
  - Two open weeks on-line in the Clock Ring Editor between Thursdays and Mondays.

- Four weeks of information on-line, available for reports.
  - When transferring hours to different finance numbers, all (37,000) finance numbers are available on-line.
4. Automated Close out.
- TACS automatically closes out the payroll week.
  - In ETC, a timekeeper must manually close out the week every Saturday morning.
5. Reporting.
- ⊖ 54 On-Demand Reports vs. 42 for ETC.
  - Near real time reporting. PSDS reports may take hours to print due to the nature of a mainframe application.
  - Employee Leave balances current to the pay period.
  - Salaries and benefits by Pay Location and Employee Type. ETC can only support Employee Type.
6. Minimize paperwork
- City Time Card Entry built into TACS application.
  - ⊖ Ability to place employees' time on hold through Monday. This will reduce payroll adjustments. (ETC does a final upload on Saturdays).
7. Can provide real-time data to other National Applications
- Activity-Based Costing requires information at the two-digit local unit code level. No other system can provide the information.
  - Commitment Management (CM-IOM) listed TACS as critical to a successful implementation of the CM application, since PSDS cannot support CM-IOM data requirements.
8. Improved Lower Network

- Data Collector can support multiple data collection requirements.
  - Smaller network with increased functionality.
  - Better control and maintenance of the poller.
  - Reduced complexity; MFDC has 500 modules, TACS data collector has 50.
  - Reduced number of phone lines at the District Offices because there is no need for downloads and uploads every week.
9. Current T&A Platforms are out-dated
- PSDS hardware is obsolete, needs to be replaced, and has a high cost of maintenance.
  - Increasing difficulty to support DOS-based applications (ETC) within the current Postal infrastructure.
  - Maintaining 1 system instead of 3 will save about 3 million dollars every year.
10. Payroll adjustments cost the postal service about 70 million dollars per year. TACS reduces the number of document handlings.

### **BUSINESS FUNCTION (PW,9)**

The TACS system provides supervisors and managers with actual work hour data used in monitoring their labor hours and dollars at the local level. The system will transmit summarized data of the actual payroll hours to the Payroll System at the Minneapolis ISC. The primary business function of this system is to collect and calculate time and attendance information needed by the Payroll System so city employees are paid accurately and timely.

## **SYSTEM USE** (PW,10)

The TACS system is used by postal installations to collect city employee time and attendance information. There are many users of the Time & Attendance Collection System because of the corporate value of its data. The information collected and processed is beneficial for the postmasters of the smallest offices all the way to the national reports reviewed by the Postmaster General.

Many information systems now interface with ETC and PSDS. TACS will continue to provide information to these systems. It will allow read only access to its employee work hour information for systems like Plant Information Management System (PIMS), Delivery Services Information System (DSIS), Management Operating Data System (PC-MODS), Performance Cluster FLASH, Leave Analysis Tracking (LATS) and Automated Vehicle Utilization System (AVUS).

The most common users at the local level will be managers, support personnel, supervisors and timekeepers. Managers and support personnel will use the system to monitor aspects of operational performance, i.e., for reviewing facility, pay location, finance number, or LDC work hour, leave and overtime usage. Supervisors will use TACS to enter and monitor unit employee overtime, leave, and higher level assignments. The timekeepers will use the system to help maintain employee data, and will ensure that all performance cluster employees are paid correctly.

The report packet contains samples of most of the 54 reports currently available in TACS. In TACS reports, you will find useful, near real-time information about your operations, presented in a variety of pre-set formats, that you will be able to generate for yourself at your personal computer.

One such report is the Employee All Report.

## Facilitator's Guide

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TACS TRAINING

In the Employee All Report, Processed Rings are good rings and Un-Processed Rings are rings that are in error. One fatal error will prevent rings from processing for the entire day. This report provides great detail about each ring. The header information includes leave balances, current to the previous pay period. The ssn column provides a trail of who added or deleted rings.

Another useful report is the Overtime Alert Report, which is similar to the Scheduled Assistance Report from PSDS. This report shows the overtime worked by each employee in the pay location by day, with an individual total for the week on the right.

UNITED STATES  
POSTAL SERVICE

Report: TAC000R3

YrPPWk: 1999-22-1

Fin. #: 47-4634

Restricted USPS I&A Information

KNOXVILLE P&OC

Overtime Alert Report

Date: 03/04/00

Time: 01:15 PM

Page: 1

SubUnit: 980

Weekly

Employee ID	Employee Last Name	F	M	D	Schedule	Hours	SAT	SUN	MON	TUE	WED	THU	FRI	Total
091-161506	HAUB	K	M	41-0	SSMTWTF	WK OT	0.00 0.00	0.00 0.00	9.00 0.00	0.00 0.00	0.00 0.00	10.50 2.50	9.00 0.00	26.50 2.50
124-02-0664	CLARK	T	N	41-0	SSMTWTF	WK OT	0.00 0.00	0.00 0.00	9.00 0.00	0.00 0.00	0.00 0.00	10.50 2.50	9.00 0.00	26.50 2.50
190-02-4116	SATO	E	L	11-0	SSM-TF	WK OT	10.13 2.13	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	10.13 2.13
190-17-5351	MADISON	S	P	41-0	SSMTWTF	WK OT	0.00 0.00	0.00 0.00	9.00 0.00	0.00 0.00	0.00 0.00	10.50 2.50	9.00 0.00	26.50 2.50
190-21-9613	BIGELOW	M	D	41-0	SSMTWTF	WK OT	0.00 0.00	0.00 0.00	9.00 0.00	0.00 0.00	0.00 0.00	10.50 2.50	9.00 0.00	26.50 2.50
190-01-5461	LOYOLA	T	D	41-0	SSMTWTF	WK OT	0.00 0.00	0.00 0.00	9.00 0.00	0.00 0.00	0.00 0.00	10.50 2.50	9.00 0.00	26.50 2.50
193-09-6920	TUCKER	L	E	12-0	-MTWTF	WK OT	0.00 0.00	0.00 0.00	6.50 0.00	0.00 0.00	0.00 0.00	9.50 0.50	0.00 0.00	15.00 0.50
193-17-4079	PAYNE	T	A	12-0	-MTWTF	WK OT	0.00 0.00	0.00 0.00	6.50 0.00	0.00 0.00	0.00 0.00	9.50 0.50	0.00 0.00	15.00 0.50
195-95-9029	JOINER	D	L	12-0	-MTWTF	WK OT	0.00 0.00	0.00 0.00	6.50 0.00	0.00 0.00	0.00 0.00	9.50 0.50	0.00 0.00	15.00 0.50
199-19-0590	STERLING	A	R	11-0	SSM-TF	WK OT	10.13 2.13	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	10.13 2.13
611-00-4296	BUSH	G	J	12-0	-MTWTF	WK OT	0.00 0.00	0.00 0.00	6.50 0.00	0.00 0.00	0.00 0.00	9.50 0.50	0.00 0.00	15.00 0.50
914-26-4959	BOWERS	C	N	11-0	SSM-TF	WK OT	10.13 2.13	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	10.13 2.13
917-42-5052	TALIAFERO	L	T	11-0	SSM-TF	WK OT	10.13 2.13	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	10.13 2.13
925-26-0669	LANGSTON	M	N	12-0	-MTWTF	WK OT	0.00 0.00	0.00 0.00	6.50 0.00	0.00 0.00	0.00 0.00	9.50 0.50	0.00 0.00	15.00 0.50
990-16-2975	MC GEE	D	W	11-0	SSM-TF	WK OT	10.13 2.13	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	10.13 2.13

By the conclusion of today's training, you will know how to generate these reports for yourselves.

### **TACS ASSISTANCE** (PW,13)

You may run into occasional difficulty when using TACS, as you would with any new piece of computer hardware or new application. Your first recourse, if you are unable to resolve a problem on your own using the Participant's Workbook, the TACS User's Guide, or on-screen help, is to contact your TACS Control Site. If the Control Site is closed, contact maintenance to see if the Electronic Technician responsible for TACS can assist.

Should you experience a problem with an employee's rings, or if you notice an anomaly in TACS, write down the social security number of the individual in whose record it occurred as well as the week and T&A day in which the problem/anomaly appears. Specific information is needed if the problem is to be researched.

If local personnel (TACS Control site, TACS Coordinator, Maintenance, LAN team) are unable to resolve the problem, a call should be placed to the Customer Support Branch in Eagan (1-800-USPS HELP). The operator who takes your call will ask a series of questions to identify the problem, and, if unable to resolve the problem alone, will open up a remedy ticket and direct the problem to the appropriate personnel. Make sure you inform the TACS Coordinator of any remedy tickets you open.

There are standard maintenance windows for TACS during which the application may be unavailable.

- ✓ Every Wednesday, 0100-0500 CST (database backup)



- ✓ Every 2<sup>nd</sup> and 4th Sunday of each AP, 0400-1100 CST (Unix Maintenance)

If additional or optional maintenance is scheduled, users will be notified in advance whenever possible, in "TACS Updates" found on the TACS home page.

## **COURSE OBJECTIVES** (PW,14)

Upon completion of this training, you will be able to:

- ✓ log-in and -out of the TACS application,
- ✓ navigate in the application,
- ✓ use the clock ring editor to add, change, delete, and duplicate clock rings to ensure your employees work hours are correct;
- ✓ use the clock ring error report to identify fatal and warning messages, and then eliminate fatal error messages in the clock ring editor;
- ✓ use the hours inquiry report to identify instances of guarantee time and guarantee overtime, and the unauthorized overtime report to ensure overtime is authorized;
- ✓ use reports to monitor employee clock rings to ensure employee adherence to postal standards; and to monitor unit productivity to ensure achievement of postal service targets and goals;
- ✓ use the EBR to input leave, authorize overtime, input higher level information and add or delete clock rings;
- ✓ explain, to employees who use badges, the changes to the EBR, including the different tone and different button names.

*DRAFT*

TACS TRAINING

**MODULE TWO - LOGGING IN AND  
NAVIGATING IN THE TACS  
APPLICATION**

*DRAFT*

TACS TRAINING

## **SECURITY (PW,17)**

Because TACS data is considered sensitive, every effort must be made to safeguard TACS access and information. When you print reports, make sure they are kept secure: do not leave them at

the printer for any length of time, and we recommend that you shred them, if at all possible, when discarded. It is mandatory that all users log out of the TACS application if not using TACS for awhile, or if called away from the desk. As much as feasible, avoid printing hard copy reports

If you run a report and wish to refer to it on screen, you can toggle back and forth between the TACS application and the Acrobat Reader report by using <Alt><Tab>. Hold down the <Alt> key and use the <Tab> key to move from icon to icon.

*The instructor should demonstrate how to use <Alt><Tab>.  
Have participants do what the instructor does throughout this next section.*

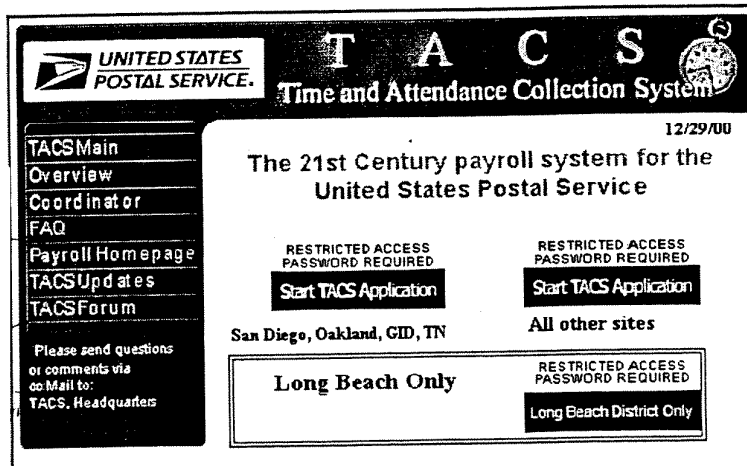
## **FINDING TACS IN INTERNET EXPLORER (PW,17)**

From the desktop, single left click on "Start" at the lower left-hand quarter of your screen. Then move up to "Office" and, when the menu appears, slide to the right to "web browsers." Click on Internet Explorer, the postal web browser of choice.

From the postal intra-net blue page, add the word "tacs" to the Uniform Resource Locator (URL) address (<http://blue/tacs>). While

it is tempting to identify the TACS home page as a “favorite,” we do not recommend it. In order to get the latest TACS updates in as timely a manner as possible, you should always start from the “Start” box.

Let's take a few minutes to look at the TACS web page.



Open each of the links, and briefly explain each one.

- “TACS Main” is the TACS home page, pictured above.
- “Overview” provides a description of TACS, much like what’s in pages 8-10 of your Participant’s Workbook.
- “Coordinator” contains downloadable files of interest to the TACS Coordinator and other users. **All training materials are found here in the “Downloads” link.**
- “FAQ” contains answers to some frequently asked questions.
- “Payroll Homepage,” currently under construction, will provide a link to the Headquarters Payroll web site.
- “TACS Updates” will provide information about changes to the TACS application.

- “TACS Forum” will provide a vehicle for you to communicate (ask questions, make suggestions, etc.) with Headquarters about TACS.

There is also a TACS cc:mail address. If you wish to send cc:mail about TACS, and have it answered by Headquarters, the address is TACS, Headquarters.

*For training, we will be logging into the TACS training database. In the training database, we can experiment and practice without affecting the pay of district employees. In contrast, when you access TACS from your workstation once the local TACS instance is activated, your keystrokes, when they are saved, will have consequences for employees' pay.*

## **LOGGING INTO THE TACS APPLICATION (PW,19)**

Since the TACS application is accessed through the local LAN, all users need a LAN account, obtained by submitting PS Form 1357.

1. From the TACS Web page, click on the box “Start TACS Application” and the Logon screen will be displayed.
- ② The user's ID will have to be entered into the first field on the screen. (All users must submit a 1357 to receive an ID.)

Logon

WARNING: This is a U.S. Government Computer System and Access is for Official Use Only. Access and Use of this System is Controlled by Government Regulations. Misuse and/or Abuse may result in Criminal Prosecution leading to Fine and/or Imprisonment.

User ID: TACS

Password:

Database: TACS

Change Password

This is TACS. Please verify your user data. Then press Enter or click the Logon button to continue. 3 logon tries remain.

Logon Cancel

Record: 1/1

3. Enter the required TACS Logon password (Train). When you get your user ID from the TACS Coordinator, you will also receive a generic password. You will need to change that generic password (see step 5).
4. Enter the database name. For training, we will use database TACSTRN8. When the entries have been verified, the TACS Home Menu will be displayed.
5. To change the password, type the new password in the "Change Password" box, press <Enter>, and then confirm it by typing the new password again. **(Do not change the password in the training class!)**

## **LOGGING OUT OF THE TACS APPLICATION**

*(PW,20)*

The proper way of exiting TACS is by pulling down the menu under "System, and left clicking on "Exit." This will return you to the TACS Home page. Once at the TACS home page, you may pull down the menu under "File" in the upper left-hand corner of your screen and left clicking on "Close." Or, you may simply left click on box with "x" in it on the upper right corner of your screen. Improper exiting from the TACS application results in your connection not ending. Inactive connections affect the speed and functionality of the application.

Of course, if your PC locks up or if the application freezes, you will have to use <Control><Alt><delete>.



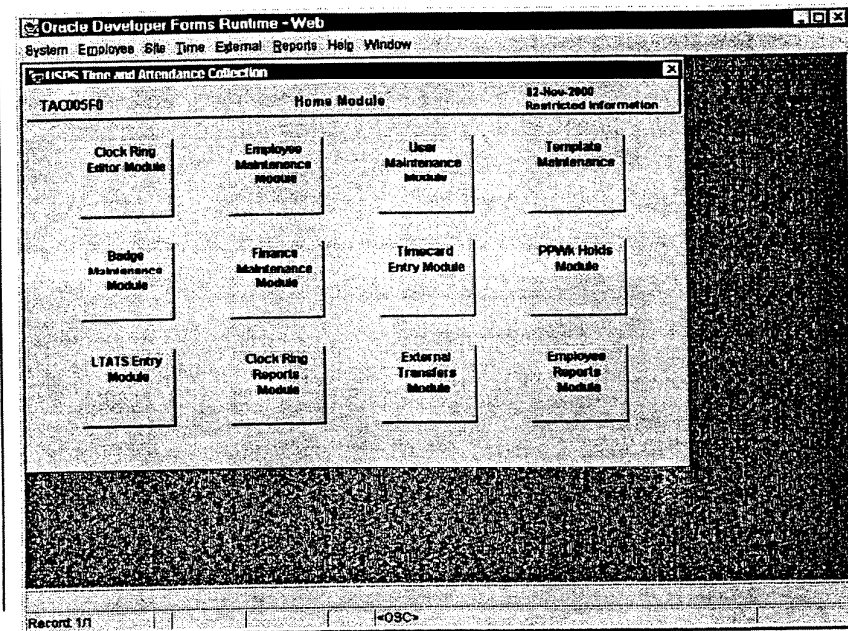
**NAVIGATING IN TACS (PW,21)**

*The District TACS Coordinator will designate levels of access to TACS. Some district employees will have read-only access (also known as query or browsing) to specific reports.*

*Supervisors, in addition to read access to reports, will have write (also known as update) privileges to the Clock Ring Editor.*

*Timekeepers will have write privileges to other TACS modules, like Employee Maintenance, so that they can continue to properly support the performance cluster.*

The screen below is a sample of how your TACS home module can look. The District Coordinator is able to customize as many as twelve buttons on this screen to make short cuts to the most frequently used areas within the TACS application. This is accomplished in the User Maintenance Module in the Icon Sequence Tab.



Your local TACS Coordinator will assign levels of access to TACS users. If you do not have access to a module, the module will be "grayed out" when you pull down the menu.

If you were able to pull down all of the menus at the same time, you would see this. (PW,22)

System	Employee	Site	Time	External	Reports	Help	Window
Template	Badge Maintenance	Finance Maintenance	Clock Ring Editor	External Transfer	Reports Queue	Contents	Cascade
Maintenance	Employee Maintenance	Misc. Site Information	Time Card Entry		User Reports	Display Errors	Tile Horizontal
User	Badge Reports	Master Schedule Maintenance	LATS Entry		Valid Code Reports	Show Keys	The Vehicle
Maintenance	Employee Reports	Active Operations Maintenance	PPWK Holds		Badge Reports	About TACS	
User Reports		Finance Reports	Clock Ring Reports		Finance Reports		
Exit		Misc. Site Reports	Timecard Entry Reports		Schedule Reports		
		EBR Network Reports	PPWK Reports		Active Operations Reports		
		Schedule Reports	LATS Reports		Misc. Site Reports		
		Active Operations Reports			Employee Reports		
		Clock Ring Reports			EBR Network Reports		
		Timecard Entry Reports			Clock Ring Reports		
					Timecard Entry Reports		
					PPWK Reports		
					LATS Reports		
					Generate HTML Output		
					Generate PDF Output		

You will note that there are multiple ways of getting to some of the modules. The menus are logically laid out. You will spend your time in columns 2 (Employee), 4 (Time) & 6 (Reports).

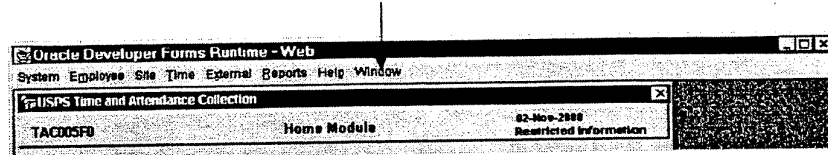
The very first item in the Reports column is "Report Queue." All reports are viewed from this queue. We will see how it works when we generate our first report.

At the bottom of the "Reports" menu, you will see two options. "Generate PDF (Portable Document Format) Output" produces a snapshot which is more pleasing to the eye, but not a text file which can be manipulated. We suggest you use PDF format when running reports.

"Generate HTML (Hyper Text Markup Language) Output" will produce the report as a text file. When saved as text, the data can be exported into other applications, like Excel or Word.

You may keep several TACS modules open at the same time (as many as 6) and toggle back and forth between the open screens. You do this by using the "Window" pull-down menu.

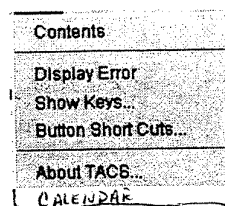
The instructor should demonstrate by clicking on the "Window" menu.



## TACS HELP (PW, 23)

We encourage you to use TACS Help as your first recourse when you run into a snag. Unfortunately, some of the TACS Help screens are still under construction and revision, so it is not always very helpful.

Click on Help.

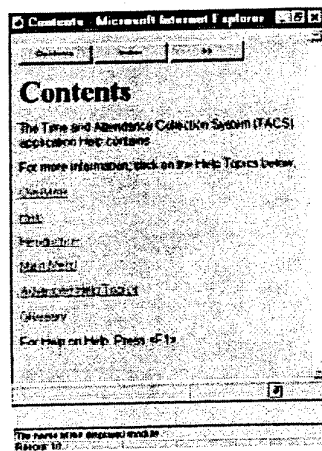


Two lists of keyboard shortcuts are contained within TACS Help, and are called "Show Keys," and "Button Short Cuts." These

provide a list of keystrokes for those who find switching between mouse and keyboard slow or cumbersome. *Have participants click on each one. Then have them turn to Appendix 1.* Appendix 1 has a list of keyboard shortcuts in Windows.

“About TACS” simply displays the current user and version of TACS. “Display Error” contains nothing when accessed from the main TACS page, but will assist in diagnosing problems and troubleshooting if you experience an error while working in a module.

When you double-click on the first item in help, Contents, you get the following pull-down menu.



“Overview” provides a description of TACS.

“Help” explains how help works in TACS. It defines Contents Help vs. Context-sensitive Help, and explains how to access different kinds of Help. In a nutshell, the Help menu at the top of the screen provides Contents help, which provides general information. When in a module or form, the “Help” button on the right side of the Form provides Context-sensitive or field level help.

Most of the Contents Help is under revision. It was written originally for a previous version of TACS (client/server) and is in the process of being rewritten.

*Briefly show participants what lies behind Introduction, Main Menu, Advanced Help Topics, and Glossary.*

We will look at Context-sensitive help as we learn the specific modules within the TACS application. We cannot stress enough the importance of utilizing Help when questions arise when you are doing your job. Think of it as a performance support system: it exists solely to ensure that you are able to do your job. And you have immediate access to it.

One particularly important and useful kind of assistance in TACS is "Hint text," found on the bottom bar of the TACS screens. Hint text provides messages meant to assist you in completing your work, an important example of which is the phrase "List of Values." Whenever a field has multiple options, the phrase "List of Values" appears on the bottom bar. When that phrase appears, the F9 key (or Find button, or <Alt><F>) will generate a menu list of options available for that particular field. We will see how hint text prompts the user in the next module.

*DRAFT*

TACS TRAINING

## **MODULE THREE – THE CLOCK RING EDITOR**

*DRAFT*

TACS TRAINING

### **INTRODUCTION TO MODULE THREE (PW,29)**

As a supervisor, you are responsible for your employees' time and attendance. Scheduling, leave and tardiness, higher level authorization, overtime--and pay adjustments if mistakes are made--all of these employee activities are your concern and responsibility.

TACS is a tool that will assist you, by incorporating the latest computer technology, in discharging these responsibilities. It will provide you with up to the minute information about your employees (near real-time), and allow you to make changes to employee records in the Clock Ring Editor easily, quickly, and without the intervention of other employees. TACS will enable you to use the Clock Ring Error Report to monitor each of your employee's clock rings. By identifying and correcting clock ring errors, you will ensure that your employees are paid properly and on time. In addition, you will be able to provide employees with timely feedback regarding behaviors which need to be addressed, like frequent appearances of creep overtime, tardiness, and incorrect use of the EBR.

In this module you will learn to use the clock ring editor to:

- ✓ add, change, delete, and duplicate clock rings;
- ✓ enter higher level information for employees when less than 40 hours in a particular week;
- ✓ assign appropriate reason codes and input leave for employees;
- ✓ monitor and authorize overtime;
- Ⓢ ✓ disallow guaranteed time, when appropriate.



You will also learn how to use the Clock Ring Error report, the Hours Inquiry report and the Unauthorized Overtime report to assist you in identifying problems that require your attention.

## INTRODUCTION TO THE CLOCK RING EDITOR

(PW,30)

Normally speaking, craft employees record four basic clock rings daily—BT, OL, IL, ET—on an Electronic Badge Reader (EBR). In addition, employees record their time spent on various operations by using the MV transaction on the EBR. The information recorded by the EBR is polled by TACS (continually, if you are in the plant; on a regular basis—at 12 set intervals—if you are connected to TACS via modem). The polled clock rings are displayed in the Clock Ring Editor.

The Clock Ring Editor module is where you are provided access to employee clock rings to ensure that all employees have the correct combination of work and leave hours as dictated by their schedules. You fix clock rings by adding, changing and deleting clock rings, as appropriate. You would add rings when an employee forgets to swipe his badge at the EBR, or loses his badge, or takes leave. You would change rings when an employee uses an incorrect operation number, when you wish to transfer hours from one local unit to another, or when you document an employee not working on overtime and you disallow the OT. You would delete a clock ring if it's erroneous, i.e., a duplicate BT or IL, or a move to an inactive operation.

Any time a ring is changed, TACS records the social security number of the individual who changed it. **NOTE: The Inspection Service audits timekeeping records, and changing clock**

rings without appropriate cause and documentation is illegal.

Payroll follows a weekly cycle. We all know that day 1 of the pay week is Saturday, which makes day 7 Friday. When the week is complete, the employee clock rings are transferred to the mainframe in Eagan. In order for employees to be paid properly, their rings must be accurate before they are transferred to Eagan. If employee clock rings are not accurate, they are in error and it is likely that a payroll adjustment will be necessary. As you may recall from Time is Money training, the average cost of a single payroll adjustment is @\$75. The cost of payroll adjustments can be avoided if all employee rings were correct.

Thus, it is incumbent upon you to ensure that your employees' rings are correct each and every day. It is critical that you run a Clock Ring Error report EVERYDAY--at the beginning of your tour--to identify ring errors from the day before. You then use the Error report to identify those employees whose rings need to be fixed in the Clock Ring Editor. If you follow this practice, you will not have to spend much time at the end of the week correcting rings, and, more importantly, the daily and weekly TACS reports you and higher level management run will be accurate. **If your employees use the EBR correctly, there will be very few rings to fix.**

On the Monday after the end of week one of the pay period, all of the employee clock rings are transferred at once—at @6:00PM local time. However, after the end of week two of the pay period, employee clock rings are reviewed four times—at 6:00PM Friday, Saturday, Sunday, and finally on Monday. Only the employees whose rings are in a "ready" status are transferred on Friday, Saturday, and Sunday. On Monday, all of the remaining employees' rings are transferred, whether fixed and ready, or not.

Transferring the rings multiple times at the end of the pay period allows the printing of checks to be spread out. **Note: PTFs, TEs Casuals, and PTRs are not pulled on Fridays.**

There are potentially two weeks of information displayed for each employee. Each week opens on Thursday. Since the rings are transferred on Monday, from Thursday to Monday TACS will have 2 weeks open. If the employee's time has been transferred to Eagan, TACS will show you the information but will not allow you to change any clock rings.

## NAVIGATING IN THE CLOCK RING EDITOR (PW,32)

Use your mouse and click on the "Time" pull-down menu, and then on the "Clock Ring Editor."

The Clock Ring Editor has only one tab. Throughout TACS, you may use a combination of your mouse and keyboard, or just your

keyboard providing you know the short cuts (see Appendix 1, or click on the "Help" pull-down menu in TACS, and select "Show Keys" and "Button Shortcuts").

*Instruct participants to do nothing while you explain the buttons.*

**Radio Buttons (PW,33)**

It is important to check "Edit Week," located right under "Employee ID," to make sure you are working in the correct week. One of three radio buttons in this column must be selected. "Current week," in the format of YYYY-PP-WK, allows you to enter and change rings for the current week. "Previous week," or "week closed," if not grayed out, allows you to see the rings, but prevents you from changing them once the week's data is uploaded to Minneapolis. "Future" allows you to enter authorizations (i.e., leave, higher level) three weeks in advance.

The training database is frozen on pay period 05, 2000. Note that the range of dates in that pay period and week are shown at the bottom of the screen.

Next to "Edit Week" is "Show Assignment." The radio button, "Base/Temp," is the default and will always be on.

Next to "Show Assignment" is "Show Rings." The two radio buttons, "All" and "Active," are used when viewing rings in the editor: "All," the default, displays all rings, even deleted rings; "Active" does not display deleted rings.

Next to "Show Rings" is "Ring Coloring." Originally, the Clock Ring Editor did not use color. The fact that it uses color now demonstrates the continual improvements that we are making to TACS based on user feedback. *In order to show participants what the CRE looks like without color, we'll call up an employee using the Find button.*

To pull up an employee's record, you may simply type in the employee ID (dashes will be filled in automatically). If you only

have the employee's name, with your cursor in the Employee ID field, you may click on the "Find" button with your mouse, or press the <Alt> key and the letter F at the same time, or press the F9 key to obtain a list of employees.

When the list of values appears, you may immediately, **without clicking or positioning your cursor**, begin typing the last name. As you type, the letters are filled in to the left of the percent sign and your list narrows.

#### **How the Find Feature Works (PW,34)**

There are 4 columns in Find: the last name, the first name, the middle initial and the employee ID. The first column, last name, is to the left of the percent sign.

The other three columns are to the right of the percent sign. To find an employee by the first name, position the cursor to the right of the % sign and type the first name. When you click on the "find" button at the bottom of the window, or press <Enter>, all employees with that first name (or something close to it) will appear.

To find an employee by a part of the ID number, key in the part of employee ID you know to the right of the % sign, and click on the "find" button or press <Enter>.

When you call up an employee, the employee's schedule is filled in, and all of the buttons function. *The instructor should call up an employee to fill in the top row so the headings are more meaningful. Participants are still only watching. If the class is*

CS, use a 13-4 employee from pay location 980 in finance number 47-4632 (or from the class pay location if less than 16 participants). If the class is P&D, use an 11-0 employee from pay location 980 in finance number 47-4634.

**Oracle Developer Forms Runtime - Web**

System Employee Site Time External Reports Help Window

**Clock Ring Editor Module** 22-Feb-2001 Restricted Information

TAC800F0 Clock Ring Editor Module

Clock Rings

Employee ID: 226-02-5833 ELIAS, JAMES J Pay Loc: 014 Clear

Edit Week: 2000-05-1 Show Assignment: Base/Temp Show Rings: All Ring Coloring: ON Weekly Sched: S-MTW-F Find

2000-05-2 2000-05-2 Active OFF Daily Sched: 07.00 - 15.50 Add

Future DA / LDC: 134 2100 Delete

Change

Transaction Code	MM/DD/YYYY	HH:Lh	Finance Number	Unit	R	LwOper	LU Route	HH:Lh	S	Ring	Msgs	T&A Frcd	Day/Day
010 00	02/12/2000	07:00	47-4632	0000	Q	01	7220	14	014010	00	00		1
011 00	02/12/2000	11:00	47-4632	0000	Q	01	7210	00	014010	00	00		1
011 00	02/12/2000	15:00	47-4632	0000	Q	01	7220	00	014010	00	00		1
014 00	02/12/2000	15:50			Q	01			014010	00	00		1
010 00	02/14/2000	07:00	47-4632	0000	Q	01	7220	14	014010	00	00	Fatal Error	3
014 00	02/14/2000	15:50			Q	01			014010	00	00		3
010 00	02/15/2000	07:00	47-4632	0000	Q	01	7220	14	014010	00	00	Fatal Error	4
010 00	02/15/2000	07:01	47-4632	0000	Q	01	7220	14	014010	00	00	Fatal Error	4

2000-05-1: 02/12/2000 thru 02/18/2000 << >>

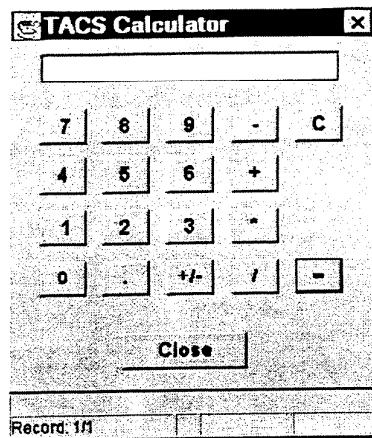
Job Assgn Duplicate Pre-Prge Calculator Save Close Help

Now demonstrate the On/Off Ring Coloring.

The last column above the editor screen displays information about the employee, specifically pay location, schedule, DA, and LDC.

## Other Buttons (PW,35)

There is a **"Calculator"** button, which provides an on-line calculator, should you need one.



The **"Job Assignment"** button on the left side of the screen displays additional information about the particular employee's job assignment. It also includes leave balances. It pulls this information from 2 Tabs in the Employee Maintenance Module: the "Job Assign/Weekly" and the "Daily Schedules" tabs. You cannot change any information about the job assignment here: those changes can only be made in the Employee Maintenance module.



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TACS TRAINING

Oracle Developer Forms Runtime - Web

Window

CRE - Job Assignment and Schedule Information

Employee ID: 226-02-5833 ELIAS JAMES J Oper Lvl: 7220 14  
 YYYYPPWK: 2000-05-1 JA: B 1261 Auto HL Variable EAS SRF:   
 Route: 014010  
 RSC Lvl: Q 01  
 Fin Rptg Grp: 47-4632  
 Finance Unit: 0000  
 Pay Location: 014  
 DA: 134  
 LDC: 2100  
 Limited Tour:   
 Emp Type: C  
 Work Week: S  
 Collection: C  
 FLSA Exempt: N

Job Assn Schedule

Sched Id: 22  
 Week No: 05  
 Sched Type: P  
 Begin Tour: 07.00  
 End Tour: 15.50  
 Lunch Time: 11.00  
 Lunch Amt: 00.50

Leave Balances

Annual: 004.01  
 Sick: 1735.42

T&A Day:   
 Out of Sched:   
 Day Off:   
 Holiday:   
 Begin Tour:   
 End Tour:   
 Lunch Time:   
 Lunch Amt:

Sat	Sun	Mon	Tue	Wed	Thu	Fri
2	3	4	5	6	7	
N	N	N	N	N	N	N
N	Y	N	N	N	Y	N
N	N	N	N	N	N	N
07.00	07.00	07.00	07.00	07.00	07.00	07.00
15.50	15.50	15.50	15.50	15.50	15.50	15.50
11.00	11.00	11.00	11.00	11.00	11.00	11.00
00.50	00.50	00.50	00.50	00.50	00.50	00.50

Close

010 00 02 15 2000 07 00 47-4632 0000 Q 01 7220 14 014010 00 00 Fatal Error A Close  
 010 00 02 15 2000 07 01 47-4632 0000 Q 01 7220 14 014010 00 00 Help

2000-05-1: 02/12/2000 thru 02/18/2000

We will discuss the other buttons as we use them.

### Headings (PW,36)

Before we begin working on clock rings, let's look at the columns in the editor.

Transaction	Finance	Time Amt	T&A Pred
Code MMDDYYYY HHhh	Number Unit R Lvl Oper LU Route HHhh S Ring Mags Day Day		
010 00 02 15 2000 07 00	47-4632 0000 Q 01	7220 14 014010 00 00	

- Code – 3-digit hours code, leading 0, plus 2-digit reason code (See Appendix 3.)
- Date – date of the clock ring
- HH hh - the time of punch, in hundredths
- Finance Number - can be changed
- Unit – Not in use at this time
- R - Rate Schedule Code: Normally, you will use only 4 RSC codes—M=Mail Handlers, P=Clerks, Q=City Letter Carriers, and E=Executive and Administrative/Casuals
- Lvl – employee's level: will indicate Higher Level if input
- Oper - Operation number: note 4 digits with trailing 0. Just as the hours codes increased to three digits (leading "0"), so

operation numbers have increased to four digits (trailing "0").

**Unlike the Hours Codes, which will accept a two-digit number, this field requires four digits.** The expansion of these numbers will allow a finer breakdown of information in the future.

- LU - Local unit
- Route - If carrier, route number
- Time Amt - total hours; i.e. duration of H/L, OT, leave
- S - Was leave scheduled (Y) or not (N)
- Ring message - There are two kinds of error message, and you need to pay attention to both kinds. **Fatal** errors appear in red and they keep the employee from getting paid correctly for that day. When there is a Fatal error, all of the rings show the message "Fatal Error," but the ring that is actually in error will be have red coloring and will show the entire message. These errors must be fixed in as timely a manner as possible so that management reports have accurate data. **Warning** messages point out that something out of the ordinary is going on, but the employee will be paid for that day, although perhaps incorrectly. Sometimes action is required for warning messages; sometimes they are just informational (i.e., "Nonscheduled Begin Tour" may or may not mean that you need to authorize overtime). Unlike Fatal errors, which disappear when the error is fixed, most warning messages don't disappear (i.e., "Nonscheduled Begin Tour").
- T&A day – There are 7 days each week. 0 means calculated by TACS based on clock rings. The zero changes to the correct T&A day when the ring is saved.
- Forced T&A day - 16 hour problem

If the T&A day were changed by a user, the last column would be filled in with the T&A day that was forced. When would you need to force a change to the T&A day? The T&A day begins and ends at 20:00 hours. If an employee is scheduled to work on or about

20:00 hours, and is asked to come in early 2 days in a row, the system may calculate 16 hours for the employee and assign the hours to one T&A day. To assign the correct T&A day to the rings of a regular employee, you need to authorize overtime for the exact number of overtime hours. If the employee is not a regular, change the T&A day to reflect the correct day for the clock rings.

Oracle Developer Forms Runtime - Web

System Employee Site Time External Reports Help Window

Clock Ring Editor Module

TACB00FU Clock Ring Editor Module 22-Feb-2001 Restricted Information

Employee ID: 226-02-5833 ELIAS, JAMES J. Pay Loc: 014 Clear

Why Sched: S-MTW-F Find

Daily Sched: 07:00 - 15:50 Add

DA/LDC: 134 2100 Delete

Delete: Input Change

Transaction Code	MM/DD/YYYY	HH:MM	Finance Number	Unit	R	Lvl	Oper	TZ	Source	Authorizer	Authorizer
010 00	02/12/2000	07:00	47-4632	0000	Q	01	7220	CST	EBR 1 Clock		
011 00	02/12/2000	11:00	47-4632	0000	Q	01	7210	CST	EBR 1 Clock		
011 00	02/12/2000	15:00	47-4632	0000	Q	01	7220	CST	EBR 1 Clock		
014 00	02/12/2000	15:50			Q	01		CST	EBR 1 Clock		
010 00	02/14/2000	07:00	47-4632	0000	Q	01	7220	CST	EBR 1 Clock		
014 00	02/14/2000	15:50			Q	01		CST	EBR 1 Clock		
010 00	02/15/2000	07:00	47-4632	0000	Q	01	7220	CST	EBR 1 Clock		
010 00	02/15/2000	07:01	47-4632	0000	Q	01	7220	CST	EBR 1 Clock		

2000-05-1: 02/12/2000 thru 02/18/2000 << >>

When you click on the double arrows on the lower right, four additional columns in the Clock Ring Editor are displayed.

- **TZ – Time Zone. This is not to be manipulated when moving in and out of Daylight Savings Time: Eagan will adjust those time shifts.** This is to be used only in those instances where an employee works in two facilities in a given day in different time zones. This will be used rarely, and, generally speaking, only in sites that are geographically located near different time zones.
- **Source – Indicates whether the ring came from an EBR or a personal computer.**

- Delete Authorizer – Social security number of the individual who deleted the ring.
- Input Authorizer -- Social security number of the individual who added the ring.

#### **Week 1, First Work Day -- “Pre-Proc” Button (PW,39)**

Now that we have examined the header information and the first clock ring for this employee for week 1, let's look at the remaining clock rings for that first day. *Walk participants through the remaining good rings for Day 1. Make sure to ask them what each entry means to keep them involved.*

The **Pre-Process** button is a handy tool, especially when learning the TACS application. The 'pre-process' functionality includes processing rings as the programmed TA\_CALC (Time & Attendance calculation) routine would, and reporting the outcome to the user. The user can then determine if the entered or modified clock rings should be saved to the database. The Clock Rings are posted to the database only when you click on the “Save” button. When you do use the “Save” button, the Editor clears. Use the Pre-Process button to check your work; use the “Save” button when you have finished making all changes to that employee's time. Only when rings are saved to the database will they appear in the Clock Ring Editor and in reports.

Click on the Pre-Proc button.

Oracle Developer Forms Runtime - Web

Window

CRE - Preprocessing Results

Pre-Process Data		T&A Data		Hours Reason		Quantity		F.L.S.A	
Employee ID	Day of Week	Date	RSC Suffix	LM	Code	Code		Exempt	
226-02-5833	Saturday	02-12-00	Q	0	01	052	00	8.00	N
226-02-5833	Wednesday	02-16-00	Q	0	01	052	00	7.89	N
226-02-5833	Wednesday	02-16-00	Q	0	01	062	00	.11	N
226-02-5833	Friday	02-18-00	Q	0	01	052	00	6.00	N

Transaction		Finance		Time		T&A Fred		Close	
Code	Date	Time	Number	Unit	R	LM	Oper	LU	Route
010	00	02-12-00	07.00	47-4632	0000	Q	01	7220	14
011	00	02-12-00	11.00	47-4632	0000	Q	01	7210	00
011	00	02-12-00	15.00	47-4632	0000	Q	01	7220	00
014	00	02-12-00	15.50			Q	01		014010
010	00	02-14-00	07.00	47-4632	0000	Q	01	7220	14
014	00	02-14-00	15.50			Q	01		014010
010	00	02-15-00	07.00	47-4632	0000	Q	01	7220	14

2000-05-1: 02/12/2000 thru 02/18/2000

The Pre-Process button will show the hours that have been posted, so far, for the week. You cannot make any changes on this tab. You make changes by closing the pre-process screen, and going back into the Editor.

Note that there are two sections in the Pre-processor. The top portion shows what days have posted for the week, and identifies, by hours code and time amount, what the employee will be paid. Days show up in this upper section only after fatal errors have been fixed.

The bottom section shows the actual rings in the Editor, but it incorporates whatever changes were made. Thus, if a ring is fixed in the Clock Ring Editor but not saved, the Pre-Processor will show you what the editor will look like when the ring is saved. In other words, it will show you whether or not you have fixed the error.

Note that, because we have 4 good rings on the first day and no fatal errors, the day posts in the top section. *Show participants that the employee worked 8 hours of regular work on day 1.*

Close the Pre-Processor.

We mentioned earlier that the **Clock Ring Error Report** will assist you in identifying errors that need your attention. On a daily basis, you will find it most useful to run a Clock Ring Error report for the entire week to identify errors and problems. If you make a habit of fixing the previous day's errors everyday, your work will not take long. You will be able to fix many of these errors immediately, by yourself, while others may require discussion with individual employees.

*Hand out copies of the appropriate generic Clock Ring Error Report obtained from the TACS web page, which will be easier to read than the examples below. Below are excerpts from the Clock Ring Error Report for the finance number and pay location of the employee we are in the process of fixing. J.F. Lyons is a letter carrier from finance number 47-4632. D.W. McGee is a clerk from finance number 47-4634. Focus the class on the appropriate employee.*

Employee ID	Employee Last Name	F	M	Base DIA	Base RSC	Exempt Code	Sched BT	Sched ET	Schedule	Lunch		
199-07-1111	LYONS	J	F	12.4	00	N	07.00	15.50	S-MTW-F	0.50		
Date	Time	Transaction	Amount	Message(s)	OpenLU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time
02/14	07.00	BEGIN TOUR		Fatal Error	7220-00	098007			00.00			00.00
02/14	15.50	END OF TOUR		(F)Missing Lunch Punch	7220-00	098007			00.00			00.00
02/15	07.00	BEGIN TOUR		Fatal Error	7220-00	098007			00.00			00.00
02/15	07.01	BEGIN TOUR		(F)Duplicate Begin Tour	7220-00	098007			00.00			00.00
02/15	11.00	OPERATION MOVE		Fatal Error	7210-00	098007			00.00			00.00
02/15	15.00	OPERATION MOVE		Fatal Error	7220-00	098007			00.00			00.00
02/15	17.50	END OF TOUR		(W)NonScheduled End Tour	7220-00	098007			00.00			00.00

Employee ID	Employee Last Name	F I	M I	Base D/A	Base RSC	Exempt Code	Sched BT	Sched ET	Schedule	Lunch		
883-16-2975	MCGEE	D	W	11-0	P0	N	14.00	22.50	SSM-TF	0.50		
Date	Time	Transaction	Amount	Message(s)	Open/LU	Route	Input Auth.	Date	Time	Delete Auth.	Date	Time
02/13	14.00	BEGIN TOUR		Fatal Error	0300-00	000000			00.00			00.00
02/13	22.50	END OF TOUR		(F)Missing Lunch Punch	0300-00	000000			00.00			00.00
02/14	14.00	BEGIN TOUR		Fatal Error	0300-00	000000			00.00			00.00
02/14	14.01	BEGIN TOUR		(F)Duplicate Begin Tour	0300-00	000000			00.00			00.00
02/14	18.00	OUT TO LUNCH		Fatal Error	0300-00	000000			00.00			00.00
02/14	18.50	IN FROM LUNCH		Fatal Error	0300-00	000000			00.00			00.00
02/15	00.50	END OF TOUR		(W)NonScheduled End Tour	0300-00	000000			00.00			00.00
02/17	14.11	BEGIN TOUR		Has 07.89 needs 00.11	0300-00	000000			00.00			00.00
02/17	18.00	OUT TO LUNCH		(F)Not Full Day On Clock	0300-00	000000			00.00			00.00
02/17	18.50	IN FROM LUNCH		(F)Not Full Day On Clock	0300-00	000000			00.00			00.00
02/17	22.50	END OF TOUR		(F)Not Full Day On Clock	0300-00	000000			00.00			00.00

Go over the header information for the Clock Ring Error Report. Tell them that they will learn how to produce this report a little later, after we finish correcting the week 1 errors. The class should be able to identify most of the headers.

"Input Auth." and "Date" and "Delete Auth." and "Date" will show the social security number of the individual that input or deleted the ring when it is someone other than the badge owner, whether the rings were input or deleted at an EBR or personal computer.

Note that, like in the Clock Ring Editor, when there is a "Fatal" error, all of the rings for that day have a "Fatal Error" warning. The ring that contains an explanation of the error is actually the only one in error. If the explanation appears on each ring, the system cannot determine which ring is in error. When that error is corrected, all of the "Fatal Error" messages for that day will disappear.

Tell participants that, because it contains no errors, the first workday does not appear on the report. The instructor should demonstrate how to draw lines on the report to separate work days.

**Week 1, Second Workday (PW,42)**

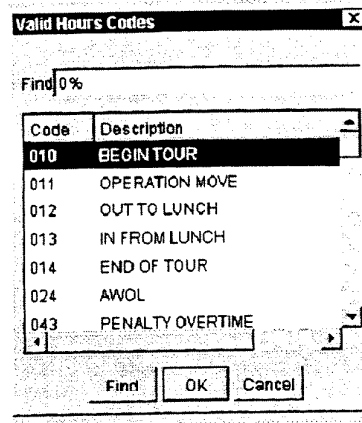
**Adding Rings**

*Move on to the second work day. Ask participants to identify the fatal error, which is a missing lunch. Demonstrate how to add the lunch rings (clerk) or the move to operation 7210 (carrier) which generates an auto-lunch.*

Click on the Add button or press <Alt> A on your keyboard, and your cursor goes to the first box – “Transaction,” “Code” – on a new line. If you already know the code, with the cursor positioned in the first field of the blank line, type it in.

But what if you don't know the code? Note that with the cursor positioned in the first field, hint text “List of Values” appears, so press <F9> or click on the “Find” button.





The first thing to note is that all of the codes now have three digits, not two. Expanding to three digits makes possible the future addition of more codes. To select from the list, use the scroll bar on the right and highlight the code you want. Then click on the OK button, or press <Enter>. Appendix 3 contains complete lists of Hours Codes and Reason Codes.

Add an OL ring (clerks) or a MV ring to operation 7210 at 10:30 (carriers) and press <Tab>. Use <Tab> or <Enter> to advance to the next field: <Shift><Tab> moves back to the previous field.

After you key the hours code and press <Tab> or <Enter>, the rest of the line fills in automatically, reflecting the employee's base schedule, and the date field is highlighted. Change it and whatever else needs to be changed by hitting <Tab> or <Enter> to advance to the next field. When you advance through all the fields, the cursor will move to the next line. If you wish to escape from tabbing through the fields, you can click on the Add button (Alt A on keyboard) to begin a new line or you can use your mouse to position your cursor on another line.

Click on the Pre-Process button again.

Note that day 2 has now posted in the top portion and the fatal error message has disappeared from the bottom section.

Rings can be entered in any sequence, and will not be sorted during data entry. After you enter your rings, the Pre-Process button will show you if there are any problems with your entries and will sort them into sequence.

If you click on the Pre-Process button and nothing happens, check to see if your cursor is on a blank line in the editor. The Pre-Process button only works when the cursor is on a line with data in it. If you are on a blank line, click on the "delete" button to get rid of the empty line, and then try the Pre-Process button again

*At this point, the instructor should assign participants an employee from the class pay location: the employee should be DA 11-0 if from a pay location in the plant finance number (47-4634), or a DA 13-4 if from a pay location in Customer Service (47-4632). The assignment may be done by preparing in advance: run an Employee Listing Report for the class pay location; make 15 copies; highlight a different 11-0 or 13-4 employee on each sheet. Alternatively, you can project an Employee Listing Report and have participants write down their assigned employee.*

*After the assignment is made, have employees use the Find feature to call up their assigned employees in the Editor. Then they correct their own employee's second work day, doing what they just watched you do, following the step-by-step instructions in the Participant's Workbook. Explain to them that all of the carriers (or clerks) have the same errors in week 1 so the Clock*

*Ring Error reports in the book will be accurate for their own assigned employees. Tell them to stop after the second workday.*

**Week 1, Third Work day (PW,44)**

**“Delete” Button and Authorizing Overtime**

*For the remaining work days in week 1, one day at a time, first ask the participants to identify the problem, then demonstrate how to fix it, then have them fix their own assigned employees. Stress that they will have a chance to work on their own employee in a few minutes, but that you need their undivided attention so they will know how it's done.*

*There are 2 problems on Day 3. The first is a duplicate Begin Tour which needs to be fixed by using the “delete” button to get rid of the second, erroneous ring.*

*After you save the deletion, an “Overtime not Authorized” Warning message will appear. The second problem on Day 3 is that the overtime has not been authorized. Let participants know that they need to pay attention to Warning messages, but that not all Warning messages require action.*

Overtime (and higher level assignment) are authorized by selecting the appropriate hours codes and adding them in the same way you added clock rings. Code 090 authorizes higher level, and code 091 authorizes overtime.

Authorize overtime in increments of 1 hour: the system will pay overtime according to clock rings. For example, if you authorize 1 hour of overtime and the employee works .50, he/she will be paid

.50 overtime. Overtime that is at the end of a regular employee's tour starts at the scheduled End tour. Overtime for employees that come in before their tour starts at the actual time of the Begin Tour.

Reason codes are now used to track the type of overtime authorized. Appendix 3 has a list of all reason codes, including the six codes used for overtime authorization.

*Demonstrate how to authorize OT, and then let participants do it for their assigned employees.*

TACS will pay overtime for employees whether it is authorized or not. But, overtime **should** be authorized for 2 reasons. The Plant will have a new program installed called PC-MODS. PC-MODS is an application that gets employee clock rings from TACS. When overtime is authorized, a code is sent to PC-MODS indicating that certain hours are in fact overtime. If the overtime is not authorized and not properly assigned as before or after tour, PC-MODS may attribute these hours to incorrect operations thereby skewing plant reports.

The other important reason is the prevention of 'creep' overtime. Creep overtime occurs when employees are lax about the timeliness of their rings. If their time on the clock exceeds the 5-minute leeway, they will be paid overtime. The Postal Service must control overtime costs and you must ensure that employee overtime is paid for time worked. You should pay attention to the Warning message "overtime not authorized," and take steps to deal with employees who are getting overtime pay for untimely rings.

If an employee's rings generate overtime, we have to pay that overtime. The only way not to pay the overtime is if you observe the employee not working the overtime, document it on Form 1017A, and obtain the employee's signature on that form. If the 1017A is properly completed, you would actually change the ring to eliminate that instance of overtime. If the Form 1017A were not properly completed and filed and you changed the ring anyway, you would be committing fraud.

#### **Week 1, Fourth Work Day (PW,45)**

##### **"Duplicate" Button and Entering Leave**

Leave entry follows the same procedure as adding clock rings and authorizing higher level and overtime. You select the appropriate hours code and add a line in the Clock Ring Editor. As in authorizing overtime, you may use increments of an hour or 1/4 hour; the system will take only the time it needs. However, **since the Clock Ring Error Report specifies exactly how much leave is missing, you should get into the habit of using exact amounts.**

**Note:** You must specify the exact amount of leave when

- overtime and leave are used on the same day;
- two types of leave are used on the same day;
- two different reason codes are used for the same day.

*Demonstrate how to fix the short fourth workday by adding annual leave. After they fix their own assigned employees, have them find the leave entry in the Pre-Processor.*

The "Future" radio button is used for inputting leave for employees beyond the current week that you are in. You may enter leave up to 21 days in advance. The dates for which leave can be entered is specified at the bottom of the screen.

Oracle Developer Forms Runtime - Web  
System Employee Site Time External Reports Help Window

Clock Ring Editor Module  
TACB00F0 Clock Ring Editor Module 22-Feb-2001  
Restricted Information

Clock Rings  
Employee ID: 226-02-5833 ELIAS, JAMES J Pay Loc: 014 Clear  
Edit Week Show Assignment Show Rings Ring Coloring Wkly Sched: S-MTWT- Find  
2000-05-1 0 Base/Temp 0 All 0 ON Daily Sched: 07.00 - 15.50 Add  
2000-05-2 0 Active 0 OFF DA/LDC: 134 2100 Delete  
0 Future Change  
Transaction Finance Time Amt T&A Frcd  
Code MM/DD/YYYY H/Lh Number Unit R Lvl Oper LU Route H/Lh S Ring Msgs Day/Day  
Job Assign  
Duplicate  
Pre-Proc  
Calculator  
Save  
Close  
Help  
Future: 02/26/2000 thru 03/17/2000

When entering leave in the future, use the weekly schedule and a calendar to determine which are the non-scheduled days for the leave week. If leave is entered for the wrong day, the employee's clock rings will supersede the leave entry, and/or the error message "Leave on Off Day" will appear.

The Add, Delete, Change, Duplicate, and Calculator buttons are available when entering future rings; the Pre Process button is not. Make sure you click on the Save button or press <Alt> S on your keyboard when finished.

The way leave is reported and coded has changed. Reason codes are now used, which specify why the leave was used. Appendix 3 has a full list of reason codes.

*Demonstrate how to enter leave using the "Duplicate" button. Then, have participants enter a week of sick leave for their employee for the week of 2/26-3/3.*

#### **Day 5, Fifth Workday (PW,47)**

##### **Authorizing Higher Level and the "Change" Button**

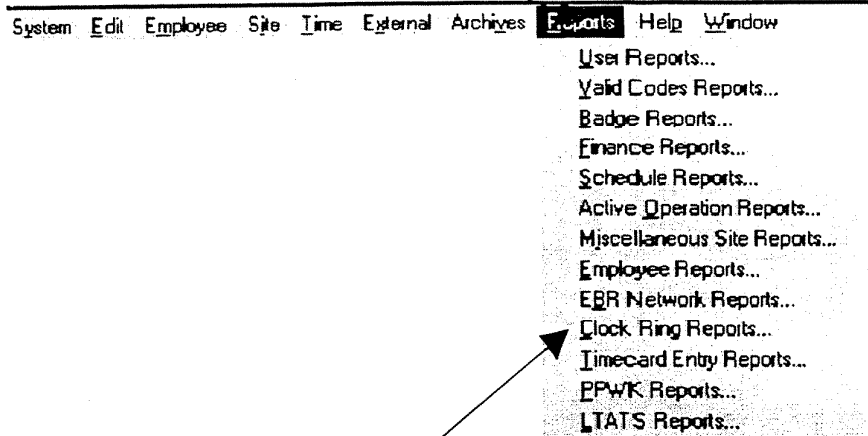
*Demonstrate how to enter higher level by putting your demonstration employee in for 8 hours at EAS 16. Let participants know that this is a fictitious situation. When someone is acting as a supervisor, they would not have 4 operational clock rings. We are giving them Higher level after the fact only to demonstrate how higher level authorizations are entered.*

*Then use the "Change" button to change the operation number to 7050 (for CS; for plant, use 7000). Tell them that **the operation number of the authorization ring does not actually charge the hours to that operation: the BT and the IL rings must reflect the correct operation number.** After the demonstration, have participants assign higher level to their assigned employees.*

Use the "Change" button when you need to change a ring. The initial, saved ring will be marked as deleted, and a new ring will be generated in which you make the change. If you want to change an entry before you save it, you may simply position your cursor in the field you wish to change, and make the change. Once you save the entry, however, you must use the Change button (Alt H on keyboard).

### The Clock Ring Error Report (PW,47)

From the main menu select Reports.



Then click on clock ring reports.

The Clock Ring Error Report is the first tab, and the default tab, in the Clock Ring Reports Module.

The screenshot shows the Oracle Developer Forms Runtime - Web application window with the Clock Ring Reports Module open. The window title is 'Oracle Developer Forms Runtime - Web'. The menu bar includes System, Employee, Site, Time, External, Reports, Help, and Window. The Clock Ring Reports Module window has a title bar 'Clock Ring Reports Module' and a date '07-Nov-2008'. The main area contains several tabs: Ck Ring Err, Miss Time, OT Aft, OT Leave, Raw Rng Err, Rng Disallow, Self Adj, Tour Dev, and Unauth OT. The Ck Ring Err tab is selected. The form contains various input fields and buttons for configuring the report. The 'Finance Numbers' section has radio buttons for 'All Finance Numbers' and 'Single Finance Number'. The 'Finance Units' section has radio buttons for 'All Finance Units' and 'Single Finance Unit'. The 'Pay Locations' section has radio buttons for 'All Pay Locations' and 'Single Pay Location'. The 'Week Period' section has radio buttons for 'Entire Week', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday'. The 'Page Breaks' section has radio buttons for 'Finance Level' and 'Finance/Sub-Unit'. The 'Error Level Selection' section has radio buttons for 'Detailed Reporting', 'Skip Deleted Rings', 'Skip Warnings', 'Skip Non-Scheduled BT/ET', and 'Minimal Reporting'. The 'Number of Copies' field is set to 1. The 'Run' button is highlighted.



**TACS REPORT PARAMETERS (PW,48)**

TACS contains an abundance of data about employees, including their master file records, clock rings, leave balances, etc. Appendix 2 lists all of the 54 reports available from TACS. This amount of data is overwhelming in its entirety: it must be filtered so we get only the information we need. For each report you run you must set parameters so that you get the information for which you are looking.

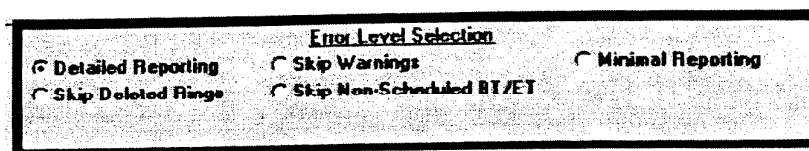
The block outlined below shows parameters that can be set on most reports.

<b>Finance Numbers</b>		<b>Finance Units</b>		<b>Pay Locations</b>		<b>Clear</b>
<input type="radio"/> All Finance Numbers		<input type="radio"/> All Finance Units		<input type="radio"/> All Pay Locations		<b>Find</b>
<input checked="" type="radio"/> Single Finance Number		<input type="radio"/> Single Finance Unit		<input checked="" type="radio"/> Single Pay Location		<b>Find</b>
<input type="text"/>		<input type="text"/>		<input type="text"/>		<b>Delete</b>
<input type="radio"/> Finance List Selection		<input type="radio"/> FU List Selection		<input type="radio"/> P/L List Selection		
<input type="text"/>		<input type="text"/>		<input type="text"/>		
<b>YrPPW (Online)</b>		<b>Week Period</b>		<b>Page Breaks</b>		
<input checked="" type="radio"/> Single		<input checked="" type="radio"/> Entire Week		<input checked="" type="radio"/> Finance Level		
<input type="text" value="2000-05-1"/>		<input type="radio"/> Saturday		<input type="radio"/> Finance/Sub-Unit		
<input type="radio"/> Range		<input type="radio"/> Sunday		<b>Number of Copies</b>		<b>Run</b>
<input type="text"/>		<input type="radio"/> Monday		<input type="text"/>		<b>Close</b>
		<input type="radio"/> Tuesday				
		<input type="radio"/> Wednesday				
		<input type="radio"/> Thursday				
		<input type="radio"/> Friday				

1. Finance Number - An assigned six-digit number that identifies an installation for processing its financial data. You may press one of three radio buttons: all, single or selection. (Selection allows you to identify as many as six finance numbers using the arrow keys on screen or your keyboard to scroll.) If you do not specify pay locations, the report will not break the data down from the finance number level.
2. Finance Units- not used at this time. Will be used to track finance number sub-unit budgets.
3. Pay Locations - As for finance number, you may press one of three radio buttons: all, single or selection.

4. YrPPW- Single Week/Range - Year, Pay Period, Week. You may select a single week, or a range of weeks.
5. Week Period - Entire Week/Single Day. You may select a single day or entire week.
6. Page Breaks - Separate finance numbers by page breaks by clicking the first radio button, or finance units/pay locations by page breaks by clicking on the second button.
7. Number of Copies.

Reports will also contain some additional, different elements. The Clock Ring Error Report, for example, contains an additional parameter called "Error Level Selection."



**Error Level Selection**

☒ Detailed Reporting    ☐ Skip Warnings    ☐ Minimal Reporting

☐ Skip Deleted Rings    ☐ Skip Non-Scheduled RT/ET

The parameters we set act like filters for the data contained in TACS, and allow us to refine our reporting precision. As you use and familiarize yourselves with TACS, you should explore how different parameter settings affect the reports you generate.

## THE REPORT QUEUE (PW,50)

The Report Queue Module is used to View, Delete and Re-Run reports that were run from the various Report Modules. Instead of the reports displaying immediately to the user, the user now will view the report from the Report Queue Module.

After selecting a report to run and setting the parameters (i.e. pay location, finance number. PP and week), click on the run button (or press <Enter>). It will seem like nothing has happened, but a hint

text message--"Report Executed. Check Report Queue"-- will appear.

Click on Reports from the drop down menu, and click on Report Queue. A screen will appear showing the report you just ran.

**Oracle Developer Forms Runtime - Web**  
System Employee Site Time External Reports Help Window

**Report Queue Module** 07-Nov-2000 Restricted Information

TAC007F0 Report Queue Module

Report Queue

Report Name	Start Date/Time	End Date/Time	Status
Clock Ring Errors	11/07/2000 09:55:53	11/07/2000 09:40:20	Complete

Refresh  
Stats  
View  
Delete  
Re-Run  
Close  
Help

If the status displayed is "starting" or "running," click on the "Refresh" button to change the status of the report you just ran. When the status says "complete," click on the "View" button and the report will be displayed.

#### Button Functions:

- Refresh – Updates the queue with the report's latest status.
- Stats – Displays a Statistics window that gives certain statistics about the report and displays any errors that may have occurred. This window can be used to see if the report is still running.
  - Refresh – Updates the statistics in the Statistics window.

- Close – Closes the Statistics window.
- View – Views a Completed report.
- Delete – Deletes the report from the Report Queue Module.
- Re-Run – Executes the selected report again using the same parameters that were used in the initial execution. This will cause the creation of another report in the report queue.
- Close – Closes the Report Queue Module.

The reports that you run will remain in the Report Queue for 4 days before the system deletes them. If you run the same reports during a week, you may run these reports from the Report Queue by highlighting the report you want and clicking on the Re-run button. Of course it will give you the same parameters you requested from the particular Report Module when you first ran it.

Once the new week has opened and you need reports for that week, you must again set up the parameters from each Report module parameter screen indicating the particular PP and week you want.

While in the Report Queue module, the Status column will display one of three messages.

- ~~Starting~~ – After clicking on the Refresh button the message should change to 'running' or 'complete'. If the message stays on starting, after clicking on 'Refresh' a few times, you may need to re-run the report.
- Running – After clicking on the Refresh button this message should change to "Complete." If not, click on the Refresh button again for an update.
- Complete – The report has finished and you may view the report by clicking on the "View" button.

Note that it does not take long for the list of reports in the report queue to grow. You need to delete reports from the queue if you will not rerun them. *Demonstrate how to delete reports from the queue.*

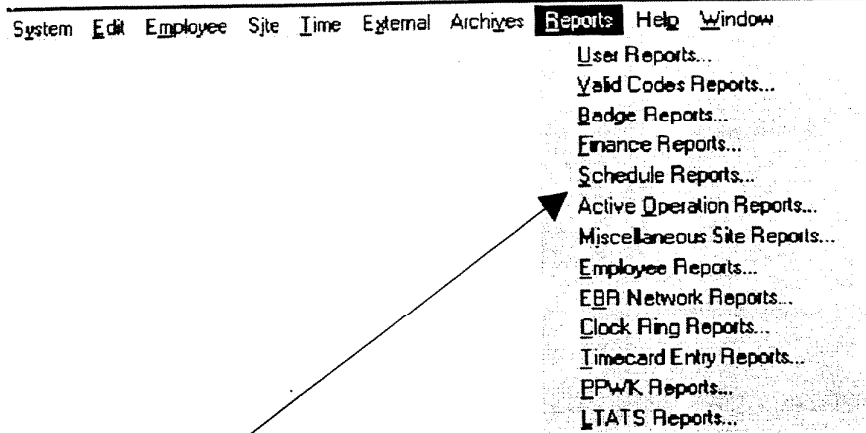
*Now that we can run and view reports, let's go back to the Clock Ring Error Report, which we already identified as an important report that you would run everyday at the beginning of your Tour.*

*Have the class run a Clock Ring Error Report for week 1. There should be no remaining errors for 13-4 employees in finance number 47-4632 or 11-0 employees in finance number 47-4634. **Only employees with errors will appear on the Clock Ring Error Report.***

*Explain to them that there are two additional reports that are very important for them to look at everyday: Hours Inquiry and Unauthorized Overtime reports.*

## The Hours Inquiry Report (PW,53)

From the main menu select Reports.



Then select Schedule Reports.

The Tabs along the top of the screen will take you to the different types of schedule reports.

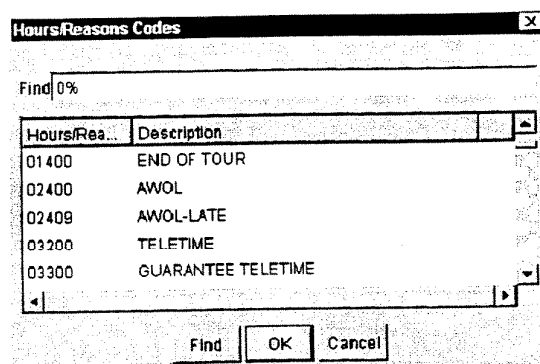
Let's click on the Hours Type Inquiry Report.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The title bar reads "Oracle Developer Forms Runtime - Web". The menu bar includes System, Employee, Site, Time, External, Reports, Help, and Window. The main window is titled "Schedule Reports Module" and contains the following sections:

- TAC120R0** (Schedule Reports Module) with a date of 08-Nov-2008 and "Restricted Information".
- Guar Warr/No Lunch** (Hrs Only, Hrs Type Inq, Mast Sched, Hol Rep, Daily Hrs, Sched Rep).
- Finance Numbers** (All Finance Numbers, Single Finance Number, Finance List Selection).
- Finance Units** (All Finance Units, Single Finance Unit, FU List Selection).
- Pay Locations** (All Pay Locations, Single Pay Location, PL List Selection).
- Clear** (Clear, Print, Add, Delete).
- YrPPW (Online)** (Single, Range).
- Week Period** (Entire Week, Tuesday, Saturday, Wednesday, Sunday, Thursday, Monday, Friday).
- Page Breaks** (Finance Level, Finance/Sub Unit).
- Number of Copies** (1).
- Code Selection** (Hours Code, Hours Code/Reason Code).
- Run** (Run, Close, Help).

The Hours Type Inquiry Report has room to select 5 different codes. After selecting the filters you wish to employ, (finance number 47-4632, class pay location), you may select either the Hours Code or the Hours Code/Reason Code by clicking on the appropriate radio button.

Let's take a look at the Hours Code/Reason Code list by clicking on the appropriate radio button, and then striking <F9>.



Note that these are 5-digit numbers. Most of the codes are hours codes with a 00 on the end. However, look at code 024. Note that there are now two codes for AWOL. Primarily for leave usage, reason codes provide a finer breakdown than was previously available. (Appendix 3 contains listings of the Hours Codes and the Hours Codes/Reason Codes.) Within code 056, for example, there are now six reasons for sick leave.

The value of Hours Inquiry Report is that it can show you the number of hours of a particular type incurred within a finance number, pay location, etc.

Let's run a sample report on some hours codes. *Solicit hours codes from participants. Make sure that 062 (guarantee time) and 068 (guarantee overtime) are identified. Stress the*

*importance of checking these two codes everyday. Have the class run the report for the class pay location, pp5, week 1.*

After generating a report on screen, the report needs to be printed, minimized (if needed again shortly), saved, or closed. The report is closed by clicking on the "X" button in the uppermost right corner of your screen.

### **The Unauthorized Overtime Report (PW,55)**

Another report that you should run daily is the **Unauthorized Overtime Report** which is found in the Clock Ring Reports Module. In PC-MODS, if overtime is not authorized, it may not be credited to the correct operation. Unauthorized overtime may skew the PC-MODS data and undermine the validity of PC-MODS reports.

Additionally, you need to control the expense of overtime. When you assign a given amount of overtime to an employee, you expect the employee to work within that timeframe. Creep overtime, which occurs when employees exceed the amount of authorized overtime by a few clicks or a few minutes, is an unnecessary expense to the Postal Service. The Unauthorized Overtime Report will show you how much overtime was used by employees in a given pay location, and how much was authorized.

*Have the class generate an Unauthorized Overtime Report for the class pay location, week 1. Go over the header information on the Unauthorized Overtime Report. Refer participants to the report packet so they can read the headers more easily. Make sure participants understand how to read the report. All of the*



## **ANNUAL LEAVE IN LIEU OF HOLIDAY LEAVE**

### **TIMEKEEPING INSTRUCTIONS**

As part of the recently issued Goldberg Interest Arbitration Award, changes will occur effective February 2, 2002 that will affect the payment of holiday leave for certain APWU employees. These instructions describe the procedures for implementing an employee's choice to have a day of annual leave credited to his/her balance in lieu of being paid holiday leave when working on a holiday or designated holiday. This document does not contain the administrative regulations, eligibility rules or the ELM revisions associated with this program. Please reference the Labor Relations memo dated January 29, 2002 from Peter Sgro for those guidelines.

#### **SPECIAL NOTE: PRESIDENT'S DAY HOLIDAY**

The arbitration decision specified this portion of the award would be implemented February 2, 2002. Therefore, the President's Day Holiday of 2002 (February 18, 2002) will be the first holiday under this program. The procedures outlined in this document apply to the timekeeping instructions for this holiday leave option. However, the Payroll Systems will not be completely modified to add annual leave to the employee's balance on the employee's earnings statement for Pay Period 6-2002. The annual leave in lieu of holiday leave information will be captured by the Time and Attendance Systems (as described below) and the additional annual leave will be credited as soon as administratively possible. In the future, the annual leave credit will appear on the employee's earnings statement in the pay period following the holiday.

#### **HOURS CODE 28 (028) - HOL/AL HOURS**

HOL/AL hours code 28 (028) has been established to track and convert the appropriate hours when an employee has elected annual leave in lieu of holiday leave. Note: Hours codes in TACS are 3 digits (e.g., 028). All other systems use 2-digit codes (e.g., 28).

##### **HOL/AL Hours Code 028:**

- Is non-add for crossfoot purposes.
- May only be entered on an employee's holiday or designated holiday.
- May not be used in combination with hours code 057 (holiday work) or 058 (holiday leave)
- Must be used in combination with code 052 (work hours).
- Is only valid for employees in RSC P or C.
- May only be entered for full-time regular or part-time regular employees.

##### **Amount of HOL/AL Code 028 Hours:**

The amount of HOL/AL code 028 hours that the employee is entitled to is the same as the amount of holiday leave hours the employee would be eligible for.

- Full time regular on an 8 hour per day schedule: 8 hours
- Full time regular on a 10 hour per day schedule: 10 hours
- Part time regular and LDC 69 employee: number of hours normally scheduled for the holiday or designated holiday.

## Leave on a Holiday or Designated Holiday

Entering HOL/AL hours code 028 causes the holiday to be treated as a normal workday; i.e., if the employee works less than a full day, leave (paid or unpaid) must be entered for the balance of their tour.

### TACS

- Bring up the employee's record in the Clock Ring Editor.  
(Hours code 028 cannot be entered at the EBR).
- Add HOL/AL hours code 028 on the day of the holiday or designated holiday.
- A scheduled tour (8 or 10 hours) of HOL/AL will automatically be generated for full time regulars.
- For part time regulars and LDC 69 employees, enter the same amount of hours that would be entered for holiday leave.

### ETC

- Bring up the employee's record in the Transaction Editor.  
(Hours code 28 cannot be entered at the EBR).
- Add HOL/AL hours code 28 on the day of the holiday or designated holiday.
- A scheduled tour (8 or 10 hours) of HOL/AL will automatically be generated for full time regulars.
- For part time regulars and LDC 69 employees, enter the same amount of hours that would be entered for holiday leave.

*Note: TACS and ETC automatically generate codes (0)57 and (0)58 for full-time regulars. When code (0)28 is entered, codes (0)57 and (0)58 are automatically removed.*

### MANUAL TIMECARDS /CTAPS/PC-CTAPS

- Total the workhours for the holiday as for a regular workday.
- Enter hours code 28, in the amount of a full-day, in the "Other Prem" column on the day of the holiday.
- **Do not** make any entries for holiday work (code 57) or holiday leave (code 58).
- Write in the amount of HOL/AL code 28 hours on the front of the timecard.

CTAPS and PCCTAPS will accept entry of code 28 as a non-add crossfoot code.

### EXAMPLES

#### Example 1: Employee Works 8 hours on the holiday or designated holiday

Employee Elects Holiday Leave	Employee Elects AL in lieu of Holiday Leave
52 - 08.00 (+)	52 - 08.00 (+)
57 - 08.00 (-)	28 - 08.00 (0)
58 - 08.00 (+)	

#### Example 2: Employee Works 6 hours on the holiday or designated holiday

Employee Elects Holiday Leave	Employee Elects AL in lieu of Holiday Leave
52 - 06.00 (+)	52 - 06.00 (+)
57 - 06.00 (-)	28 - 08.00 (0)
58 - 08.00 (+)	56 - 02.00* (+)

\* Since the employee elected the annual leave option, the holiday is treated as a normal workday. If the employee is scheduled for eight hours and requests to work less than a full day, leave must be used. In this case, the employee used two hours of sick leave.



January 29, 2002

MANAGERS, LABOR RELATIONS (AREA)  
MANAGERS, CUSTOMER SERVICES (AREA)  
MANAGERS, HUMAN RESOURCES (AREA)  
MANAGERS, FINANCE (AREA)

As part of the recently issued Goldberg Interest Arbitration Award, changes will occur effective February 2, 2002, that will affect the scheduling and payment of APWU employees for holiday work. The new contract provisions will allow eligible full-time and part-time regular employees to substitute holiday leave for a future day of annual leave. This change requires major payroll computer system changes in order that managers, postmasters, and others with timekeeping responsibility may incur the least possible disruption in managing leave records.

Note, that under this decision, hours worked on a holiday or designated holiday will continue to be paid in the same pay period worked, per Fair Labor Standards Act provisions. When the annual leave option is selected, timekeeping methods to pay hours worked on a holiday or designated holiday will change.

The new contract language, an explanation of its meaning, as well as a list of questions and answers (Q&As) are being provided to give instruction and guidance for administering requests for annual leave in lieu of holiday leave. The Headquarters Finance group will disseminate detailed timekeeping instructions in the near future, and Employee and Labor Relations Manual (ELM) revisions will be made to conform with these changes.

#### NEW LANGUAGE

##### Article 11 Section 3. Payment (new language bolded)

- A. An employee shall receive holiday pay at the employee's base hourly straight time rate for a number of hours equal to the employee's regular daily working schedule, not to exceed eight (8) hours. **Effective February 2, 2002, employees who work their holiday, at their option, may elect to have their annual leave balance credited with up to eight (8) hours of annual leave in lieu of holiday leave pay.**

##### Article 11 Section 4. Holiday Work (new language bolded)

- A. An employee required to work on a holiday other than Christmas shall be paid the base hourly straight time rate for each hour worked up to eight (8) hours. **Effective February 2, 2002, employees who work their holiday, at their option, may elect to have their annual leave balance credited with up to eight (8) hours of annual leave or receive holiday pay to which the employee is entitled as above described.**

- B. An employee required to work on Christmas shall be paid one and one-half (1½) times the base hourly straight time rate for each hour worked. **Effective February 2, 2002, employees who work their holiday, at their option, may elect to have their annual leave balance credited with up to eight (8) hours of annual leave or receive holiday pay to which the employee is entitled as above described.**

**Deferred holiday leave credited in accordance with Section 4.A or 4.B. above, will be subject to all applicable rules for requesting and scheduling annual leave and shall be combined with annual leave and counted as annual leave for purposes of annual leave carryover.**

#### EXPLANATION

The contract language added to Article 11 gives eligible (see further explanation below) APWU full-time and part-time regular employees an option to receive holiday leave or a future day of annual leave, if the employee works any part of their holiday or designated holiday. This option applies whether the employee is mandated or volunteers to work the holiday or designated holiday. If the employee elects annual leave in lieu of holiday leave, appropriate payment for hours actually worked on the holiday or designated holiday will be paid. Holiday leave hours will not be paid and the employee's annual leave balance will be appropriately adjusted by the number of holiday leave hours entitled (up to 8 hours), and become available for use in accordance with local leave usage policy and procedures as early as the following pay period. Because deferred holiday leave is combined with other annual leave credit, it becomes subject to loss if the employee has more than the maximum leave carryover at the end of the leave year.

This new provision also creates a scenario that would not have occurred in the past. This change allows leave to be charged on a holiday or designated holiday for employees who elect annual in lieu of holiday leave, but work only part of their holiday. The type of leave granted or charged will depend on whether the partial day of work is requested by the employee or required by management. If the employee requests to work a partial holiday, at the same time the employee must request paid or unpaid leave (i.e., annual, sick or LWOP) to account for the remainder of the day. While it is the employee's discretion whether to receive holiday leave pay or annual leave in lieu of that pay, the supervisor maintains authority based on local leave policy and procedures to disapprove requests for partial holiday work and for paid or unpaid leave. Employees who elect holiday leave on their holiday, and work only part of the day will, as before, not be charged any type of leave to account for the remainder of the day. If management requires that the employee work less than a full day on a holiday, guarantee time, with few exceptions, may be appropriate for the remainder of the day.

Employees and managers should be mindful that in addition to the requirement that the employee must work their holiday in order to defer holiday leave, only APWU employees who are "eligible" to receive holiday pay may elect the deferred leave option. Specifically, Article 11 Section 2 (Eligibility) provides that, "To be eligible for holiday pay, an employee must be in a pay status the last hour of the employee's scheduled workday prior to or the first hour of the employee's scheduled workday after the holiday."

## ADMINISTRATION

Employees are to use Form 3971 to notify management of their intent to elect annual leave in lieu of holiday leave pay. Modifications to the form are being developed. Meanwhile, employees are to use PS Form 3971. The block labeled, "Other" under "Type of Absence" should be checked, and the words, "Elect Annual Leave in lieu of Holiday Leave (holiday name, e.g. President's Day)" should be written in the "Remarks" section. The form must be submitted to the supervisor no later than the end of the employee's holiday or designated holiday.

The supervisor is to sign and date the form, provide the employee with a copy and keep the original for record keeping purposes. Also, supervisors are to inform employees that until the payroll system changes are completed, the deferred leave hours will not appear on the employees' annual leave balances. As soon as administratively possible, Headquarters Finance will provide the field with information about when the conversion of deferred holiday leave to annual leave will take place. Even after such changes are made, it will continue to be critical that accurate records of deferred holiday leave requests are maintained.

## QUESTIONS AND ANSWERS

1. Does it make any difference how many hours an employee works on their holiday?

**ANSWER:** No. The opportunity to receive annual leave in lieu of holiday leave pay should be granted to those contractually eligible (i.e., in a pay status the last hour of the employee's scheduled workday prior to or the first hour of the employee's scheduled workday after the holiday) and who work any part of their holiday or designated holiday.

2. If an employee elects annual leave in lieu of holiday leave pay, and does not work a full day on their holiday or designated holiday, are they required to take leave?

**ANSWER:** If an employee elects annual leave in lieu of holiday leave pay, and requests to work only part of the holiday, the employee must at the same time request some type of paid or unpaid leave (e.g., annual, sick, LWOP) to account for the remainder of that day, as with any other workday. Supervisors may refuse employees' requests to work only part of their holiday. The supervisor would also exercise normal discretion to approve or disapprove a leave request for the remainder of that day based on local leave policy and procedures. If the employee works a partial holiday because management requires it, guaranteed time, with few exceptions, may be appropriate for the remainder of the day.

3. Are Part Time Regulars (PTRs) eligible? If so, do they get 8 hours of annual leave even if they wouldn't have received 8 hours of holiday leave?

**ANSWER:** PTRs may elect to receive annual leave in lieu of holiday leave pay. The number of holiday leave hours PTRs will be entitled to convert is the same as the number of holiday leave hours that they were entitled to receive leave pay for under the 1998 contract language, Article 11.3.A., "... for a number of hours equal to the employee's regular working schedule, not to exceed eight (8) hours." For example, a PTR who is normally scheduled 5 days in a service week for 6 hours per day would normally be entitled to 6 hours of holiday leave pay. Therefore, if otherwise eligible, the employee may elect to convert it into 6 hours of annual leave.

4. May employees who do not work any part of their holiday or designated holiday elect annual leave in lieu of holiday leave?

**ANSWER:** No. The option to elect annual leave in lieu of holiday leave is available only to eligible employees who work at least some part of their holiday or designated holiday.

5. When is this new annual leave available for use?

**ANSWER:** The annual leave will be included in the employee's regular annual leave balance and be available for use, subject to established local leave usage policy and procedures, as early as the pay period after the holiday or designated holiday. Initially, employees' records will not reflect the converted annual leave. Employees' annual leave balances will be updated as soon as the payroll systems have been modified. Once payroll system changes are completed, annual leave in lieu of holiday leave pay will be reflected as annual leave in employee records the pay period following the holiday or designated holiday.

Please ensure that this information is disseminated to all field offices. If you need further information, please contact Dee Scott of my staff at (202) 268-4398.



Peter A. Egro  
Manager  
Contract Administration



January 29, 2002

MANAGERS, LABOR RELATIONS (AREAS)  
MANAGERS, HUMAN RESOURCES (AREAS)  
MANAGERS, HUMAN RESOURCES (DISTRICTS)  
MANAGERS, CUSTOMER SERVICE AND SALES (DISTRICTS)  
MANAGERS, FINANCE (AREAS)  
MANAGERS, FINANCE (DISTRICTS)  
MANAGERS, OPERATIONS SUPPORT (AREA)

SUBJECT: USPS/APWU Interest Arbitration Award - Compensability of Travel Time

The Goldberg Interest Arbitration Panel recently issued an award that establishes the terms and conditions of the 2000-2003 National Agreement between the Postal Service and APWU-represented employees. One part of the Award changed the rules governing travel pay for employees covered by this contract.

Under the terms of the Award, effective December 18, 2001, all time spent by an APWU represented employee on travel for the purpose of receiving job-related training at which the employee remains overnight, is compensable. Included in the decision is that Article 36, Section 2 will be amended by adding the following:

***"C. All travel for job-related training will be considered compensable work hours."***

The provisions for compensable travel time for APWU-represented employees should be applied in the following fashion:

1. **Eligibility:** This type of travel is compensable on scheduled and nonscheduled days. Travel time is the time spent by an employee moving from one location to another during which no productive work is performed. This includes time spent traveling between residence, airport, training facilities, and hotel (portal to portal).

Portal to portal compensable in-transit time:

- begins with departure from the employee's residence or home installation and ends with arrival at the temporary place of lodging or work location; or
- begins with the departure from one temporary place of lodging or work location and ends with the arrival at another temporary place of lodging or work location; or
- begins with the departure from the temporary place of lodging or work location and ends with the arrival at the employee's residence or home installation.

2. **Scheduling of Travel:** Travel away from home overnight is to be scheduled by management. While the employee can make his/her own travel arrangements, those arrangements are subject to the concurrence of the employee's approving official. The employee may not commit Postal Service funds without the proper approval. Wherever possible, travel should be scheduled within the employee's regular workweek.
3. **Schedule Change for Employees Returning Home from Training:** Employees may request a schedule change in order to attain a reasonable amount of personal time for rest and relaxation prior to reporting for work. Such a request is subject to prior approval of the employee's union steward and supervisor. The employee will not be eligible for out-of-schedule premium as a result of these changes. When employees do not request a schedule change, and the return time [which equates to the end of the approved compensable training time] is within ten hours of the employee's regular scheduled tour, managers will (prior to the beginning of training) identify the training schedule hours as extending through the employee's first nonscheduled day following completion of classes. In such circumstances, this schedule change is considered to be required as part of the training, and the employee will not be eligible for out-of-schedule premium.
4. **Intermediate Travel Home:** When employees are attending extended training courses (such as in Norman, Oklahoma), they may be entitled to a trip home for personal convenience, as specified in Handbook F-15, Section 8-1. While the cost of the transportation expenses are paid by the Postal Service, the travel time for this trip is not compensable.
5. **Approved Travel Time:** Approved travel time is the time allotted by the Postal Service. Employees will not be compensated for extensions beyond this time due to personal actions. Extensions beyond this time at the request of an employee are considered excessive time. Employees will not be compensated for additional travel hours due to their own personal actions; e.g., use of POA rather than traveling by airplane (F-15), volunteering to be bumped, or changing flights for personal convenience.
6. **Handling Unusual/Emergency Circumstances:** In light of the current conditions surrounding increased airport/airline security, when employees experience delays and cancellations, procedures in Handbook F-15 should be followed. (Example: An employee is traveling home from Norman, Oklahoma via Denver. The scheduled flight is cancelled. There is no alternative flight. The employee must remain overnight in Denver. The employee is paid up until he/she reaches the place of lodging from the airport, at which time the clock stops. The travel time would resume the following day when the employee leaves for the airport). Each office should set standards for its employees to follow, in compliance with ELM 438 and F-15).
7. **Maximum Hours Allowed:** ELM 432.32 specifies that "Except as designated in labor agreements for bargaining unit employees... employees may not be required to work more than 12 hours in 1 service day. In addition, the total hours of daily service, including scheduled workhours, overtime, and mealtime, may not be extended over a period longer than 12 consecutive hours." Since travel for job related training at which the employee remains overnight is considered compensable "work hours," APWU bargaining unit employees should not be required to work more than 12 hours a day, whether it be in a travel status, or in a travel and training status. However, if the employee travels beyond the 12 hours for personal convenience, that is his/her own choice.



8. **Recording Time:** Code 83 will no longer be used to record non-compensable travel time. Eligible employees will be compensated for this travel time whether or not it is within their bid schedule. The kind of compensation will depend on when they travel. It will be recorded as regular work hours, overtime, penalty overtime, or holiday work, as appropriate.

These changes are only applicable to APWU travel for training at which the employee remains overnight. The ELM and F-15 handbooks will be revised to comply with the changes specified in the interest arbitration award.

Please ensure that all travel of APWU-represented employees is carefully monitored so that proper compensation is provided in such travel situations. If there are any questions, please direct them to Thomas Valenti at (202) 268-3831.



Peter A. Sgro  
Manager  
Contract Administration



*overtime for 13-4 or 11-0 employees for week 1 should have been authorized.*

*Ask participants if they have any questions before we proceed.*

### **First Group Exercise (PW,55)**

*Explain that we will spend some time practicing what we've learned. We fixed the errors we found in week 1 for our assigned employee. Now hand out the generic Clock Ring Error Report, obtained from the TACS web page, for the other types of employees for week 1.*

*Next, divide the class into groups of 3. Each group is assigned 2 other types of employees. CS has been working on a 13-4 employee: in this exercise, they will work on an 11-0 and a 43-4. P&D has been working on an 11-0 employee; in this exercise, they will work on a 12-0 and a 41-0. The class pay location will have 5 employees of these other types. To make the assignment, either prepare copies of the Employee Listing Report for the class pay location in advance, with two employees highlighted on each handout, that the group will fix. Or, you may project the Employee Listing Report for the class pay location and have each group write down the employees they will fix.*

*We will now split into groups of 3. Each group will be assigned a PTF and another employee type. Correct all of the errors that appear on the Clock Ring Error Report for your assigned employees for week 1.*

After you have corrected all of the errors, run the Clock Ring Error Report, the Hours Inquiry Report for codes 062 and 068, and the Unauthorized Overtime Report to check your work.

**Individual Exercise (PW,56)**

*Have participants return to their seats. Hand out the generic Clock Ring Error Report for the 11-0 or 13-4 employee, obtained from the TACS web page, for week 2. Tell them to use the report to fix the week 2 errors for the employee they were previously assigned.*

There is a holiday in week 2, so their employees get 8 hours of holiday pay. In addition, they worked one of their off days. On the off day worked, they are guaranteed 8 hours. Their rings for the day add up to 7.95, so they are paid .05 guarantee overtime (068).

On the fourth workday, your employee came in .15 late, had a scheduled doctor's appointment at lunch, and had to work 2 hours of overtime.

★*The correct solution for the fourth workday is .15 of code 055 09 at the scheduled begin tour, 1.5 hours of code 056 00 and code 093, at lunch, and 2 hours of 091 02 at the scheduled end tour.*

*The instructors should circulate, making sure that everyone knows what they are doing.*

**Second Group Exercise (PW,56)**

*Hand out the generic Clock Ring Error Report, obtained from the TACS web page, for the other types of employees for week 2.*

We will now split up into the same groups of 3 we did earlier. For the same 2 employees your group was previously assigned, identify the week 2 errors and then fix them.

When you believe you have fixed all the errors, run a Clock Ring Error Report for week 2 for the class pay location. If the errors are fixed, your employees will not appear on that report.

Then run an Hours Inquiry Report to check guarantee time and guarantee overtime for week 2. After you have finished correcting any guarantee time for your assigned employees, run an Unauthorized Overtime Report, and authorize any OT worked by your assigned employees that has not yet been authorized.

These exercises you have just completed are exactly what you will be doing when TACS is in production. The differences are that you will be working on your own employees, you will be working alone, and the errors will not be so numerous. Remember that you can ask for assistance from your peers, the data site, the TACS Coordinator, TACS instructors and coaches. The way to make sure the errors are few is to ensure that your employees use the EBR correctly.

## **MOVING HOURS FROM ONE STATION TO**

**ANOTHER** (PW,57) *(For Customer Service and others, if appropriate)*

A question delivery supervisors always ask: "How can I move work hours when I borrow/lend a carrier to/from another station." The

local unit add-on to the operation number reflects the pay location in delivery units. By simply changing the LU to another pay location, you transfer the hours. For this demonstration, we will use FTR Annie Smith, 198-92-0556, who normally works on operation/LU 721-00/722-00. We will move the hours to 721-12/722-12.

- In order to move the hours to another station, all we need to do is change the LU on the operation numbers from 00 to 12.
- Highlight the first BT on the screen with your mouse.
- Click on the change button or <Alt> U on your keyboard.
- When the box moves to LU just type over 00 with 12 and do this for all rings with operation numbers.
- A simpler way would be to ask the employee to use LU 12 at the time she is clocking in at the EBR.

Hours can also be transferred between finance numbers in the Clock Ring Editor, as long as the user has access to both finance numbers involved.

Customer Service supervisors have instructions, in Appendix 4, for uploading TACS work hour information to DSIS.

*DRAFT*

TACS TRAINING

**MODULE FOUR -- USING TACS  
TO MONITOR EMPLOYEE  
PERFORMANCE**

*DRAFT*

TACS TRAINING



## INTRODUCTION TO MODULE FOUR (PW, 61)

Generally speaking, most of your work in TACS will be done early in your tour. This way you can review yesterday's performance and identify positive and negative trends as you review and correct your employees' clock rings.

After you have made appropriate changes in the Clock Ring Editor based on the errors you identified from the Clock Ring Error Report, the Hours Inquiry Report, and the Unauthorized Overtime Report, wait a short while (10 minutes in the plant; 1 hour, or a different pre-set interval, at a station using a modem connection) and run either the Station Summary Report or LDC/Operation Summary Report. These reports will provide summary information incorporating the changes you entered and are used to check that your employees' hours are now correct. In delivery units, if employee clock rings are fixed by the time the daily DSIS report is run, employee rings will not need to be fixed in DSIS.

**NOTE:** Do not run reports until you have fixed the rings for the day: if you run reports for employees with errors in their rings, the reports will incorporate the errors and the results will be inaccurate. Remember, garbage in, garbage out.

If time permits, it will help the next day's timekeeping if you enter 1260s and 1261s, 3971s, 3189s, etc. into the Clock Ring Editor before you leave for the day. **Note: You may enter same day data only after the employee's scheduled ring time.** If time permits, you may begin correcting same day rings for employees who have already ended tour.

In Module 4 we will look at and discuss some additional reports as well as some other features of TACS that you will find useful.

## **ARCHIVE REPORTS** (PW,62)

In general, 2 pay periods or 4 weeks of information remains available for TACS reports. After 4 weeks, the information is no longer available, except for archive reports. The following 9 reports will be able to retrieve archive data in TACS. Data that is archived is available for three years before being dropped.

### **Employee Reports**

- Employee Everything Report
- Employee Listing Report
- Employee Moves Report

### **Finance Reports**

- LDC/Operation Summary Report
- Station Summary

### **Schedule Reports**

- Hours Analysis Report
- Daily Hours Report

### **Clock Ring Reports**

- Ring Disallowance Report

### **Timecard Entry Reports**

- Time Certification Report

## **Reports Exercise** (60 minutes) (PW,62)

*Divide the class into 3 groups. Assign each group one of the groupings of reports. Tell them that they should run each report*

*at least twice using different parameters for their class pay location. Then 3 different spokespersons in each group will explain the three reports to the rest of the class who will use the sample report in the report packet to follow along.*

LDC/Operation Summary (P&D) or Station Summary (CS)

Daily Hours

Employee Listing

Employee All

Employee Moves

Missing Time

Overtime Alert

Hours and Dollars

Employees on the Clock

For your assigned group of reports, run each report at least twice using different parameters, and discuss all of the assigned reports, using Finance Number 47-4632, pay location 980 (Customer Service) or 47-4634, p/l 980 (Processing & Distribution). Discuss the value of each report with your group, and identify which reports will be most helpful and/or most widely used at your workplace, and why.

Each group will identify 3 spokespersons, and each spokesperson will explain one of the 3 assigned reports to the rest of the participants, using the sample report in the report packet for illustration.

If you will want to refer again to the report after viewing it, be sure to minimize it rather than close it. If there is no data in the report, use the sample reports in the report packet.

There are other valuable reports that we will not look at because they are not available in our training database. For example, Raw Ring Errors and Automatic Higher Level Reports both depend on rings from time clocks; and the Time Certification Report and the FLASH Reference Report require that the week be closed.

*The following information is provided to the instructor to assist in debriefing each of the reports.*

**The Station Summary Report** lists work hours by LDC, as well as overtime and sick leave hours. The hours are reported by day of the week and a weekly total column is also provided.

*This report, as all TACS reports, is only as good as the data feeding it. For example, if employees used erroneous operation numbers that are not corrected, the report will be skewed. If your office uses local units, you should run this report by local units: this will allow you to reconcile the Station Summary with PCFlash.*

**The LDC/Operation Summary Report** offers several reporting options in the "Summarize By" section on the bottom of the form. The user can pick the LDC's, Operations and Local Units desired to see on the report. The default will be all LDC's and/or all Operations and Local Units. All of the reports total work hours, overtime hours and sick leave hours by LDC and/or by Operation. These reports are based on operation hours attributed to the finance number and/or pay location you select. Again the data is only as good as the inputs: EBR errors will produce erroneous reports ("Garbage in, garbage out!")

**Daily Hours Report** gives daily totals of different hours codes. Casuals and PTF's may not work everyday, but because they

are not in error and don't follow a fixed schedule, they will not show up on the Clock Ring Error Report or the Missing Time Report. The Daily Hours Report will show what hours were actually worked by these employees.

**Employee Listing Report** generates lists of employee, by pay location, showing non-scheduled days, reporting times, base operations, etc. It can be used in granting leave requests. Any corrections to the Employee Listing Report should be sent to the TACS Control Site so that the Employee Master File can be correct.

The **Employee All Report**, which we looked at in the beginning of the class will give you all rings for a pay location or a single employee. It can be used for payroll and grievance research, and shows all activity relating to each employee. It will identify which EBR was used for particular rings, who made changes in the Clock Ring Editor, employee leave balances, etc.

The **Employee Moves Report** identifies the amount of time spent by employees in a particular operation and/or LU.

One very useful report will be the **Overtime Alert Report**, which will assist you in maintaining the Overtime Desired List. It will help you monitor employees, including PTF's and casuals, who have worked overtime on consecutive days so as to avoid penalty overtime. It will also identify instances of creep overtime. An employee will show up on this report if

- S/he has worked more than 8 hours for any day of the week;
- S/he has worked both scheduled days off;

- *She has worked more than 32 hours for the week and also worked a scheduled day off;*
- *She has already worked overtime;*
- *She is still on the clock and the projected time remaining on her/his schedule will take her/him into overtime;*
- *His/her cumulative work, plus his/her remaining schedule will take him/her into overtime for the week.*

*The **Missing Time Report** will identify employees who are missing time. **Caution: not all employees missing time (i.e., casuals) will show up in the Clock Ring Error Report.** For example, the Missing Time Report will pick up an erroneous entry made via the EBR that does not appear in the Clock Ring Error Report.*

*The **Hours and Dollars Report** provides actual work hour costs by employee category and Des. Act. code.*

*The **Employees on the Clock Report** can tell or who is working at a given time and on what operation. It is useful for delivery units to determine you who is still out on the street. It can be used in a crisis situation to determine who is in the building. This is also an important report for the Inspection Service.*

*The **Carrier Moves report** will show when carriers left and returned to the office.*

## OTHER OPTIONS/BENEFITS IN TACS

### Badge Control (PW,64)

The new software in your Badge Making Equipment is able to assign a badge type and sequence number to a particular badge.

All badge types currently in use will be recognized as sequence number "0" when you start using TACS. If an employee loses a badge, the badge is deactivated in TACS, and the next sequence number (i.e., "1") is assigned to the new badge. If the employee uses a badge that does not have this "active" sequence number, the employee's rings will not process. These unprocessed rings will be found only in the Raw Ring Error Report. We hope to see an enhancement shortly which will have employee use of an unassigned badge appear as an error in the Clock Ring Error Report.

There are <sup>3</sup>~~six~~ types of badges that can be created for employees.

Type 1: Permanent Regular Badge

Type 2: Permanent Authorizing Badge

~~Type 3: Permanent Dual Badge~~

~~Type 4: Temporary Employee Badge~~

~~Type 5: Temporary Authorizing Badge~~

Type 9: Vehicle Badge

While your employees will have one, and only one, Type 1 badge, supervisors will be issued a Type 2, authorizer, badge.

In the next module, we will see how to use the EBR to enter data in TACS. The Authorizer Badge will enable you to work on your employees' time at the EBR. It is possible to do just about everything you can do in the Clock Ring Editor on the EBR.

Authorizing overtime on the EBR in fact can be easier than doing it on a personal computer.

It will also enable you to restart an EBR should one lose power.

Finally, you can use it as a badge to record your own time. You can swipe an authorizer badge in the same way a craft employee swipes a Type 1 badge.

The TACS Coordinator will not normally provide any postal employee with update access to his/her own employee record.

All EAS employees can be paid automatically and by exception. When the 1261 indicator is checked in the job assignment tab of the employee's maintenance file, clock rings are automatically generated by TACS. EAS exempt employees do not qualify for overtime or other premiums, so their timekeeping amounts to entering leave when appropriate.

Special Exempt employees do qualify for extra straight time when they work more than 8.5 hours. The supervisor can swipe the ET with the authorizer badge, and it will override automatic generation of the ET. If the extra work is before tour, the supervisor should swipe the BT and the ET. Alternatively, the supervisor can provide a 1260 to his manager who can enter the ET for the supervisor in the Clock Ring Editor and authorize the additional work time.

Because the automatically generated rings are always swept first on Friday of week 2 of the pay period, the inputs for additional supervisory work on Fridays need to be timely. If a supervisor is working extra straight time on day 7 of week 2, he should ask the data site to put his rings on "hold."



## THE EMPLOYEE MAINTENANCE MODULE (PW,66)

The Employee Maintenance Module contains information on each employee in TACS. This information is updated from the Minneapolis Mainframe each week. When Employee Maintenance is selected, the User, providing he has update access, may add, change or delete (remove) employees from the TACS application.

You will have query only access to most of the Employee File Maintenance module. All changes to Employee Master files will be made by TACS Control Site personnel, with the exception of Daily Schedules changes.

When the User first enters the Employee Maintenance Module, the Employee Tab screen will appear. An employee ID must be entered before any other tabs can be used. *Enter an employee's*

*name so the fields are filled in.*

- “Start Pay period” indicates the pay period during which the employee started in the Postal Service.
- “Start Date” gives the actual date of hiring, useful for determining seniority, and is downloaded from the mainframe.
- “Employee Status” indicates if the employee is active, pending, terminated, or deleted.
- “LATS Access Level” will indicate the particular user’s level of access in LATS.
- “Automatic Higher Level Indicator” must be checked for the employee to be paid higher level automatically when using certain operation numbers, as long as he/she is of the correct DA Code and LDC. (See PW, 93-96.)
- “Borrowed Employee Indicator” is checked only when the employee is on loan from another performance cluster and is being paid out of the other performance cluster. If this box is erroneously checked for a performance cluster employee, the employee will get LWOP for that period of time.
- “Time Collection” indicates whether the employee is in a time clock (EBR) or time card office.

Other employee information can be accessed from this screen. By selecting a Tab on the top of the screen the User may select Job Assignment/Weekly Schedule Tab, Daily Schedules Tab, Prior Assignments Tab, or Leave Information Tab. We will briefly discuss these tabs.

*All tabs and buttons not available for use will appear grayed out. After the data is retrieved from the tables, these tabs and buttons will be available, based on the User's permissions. Users must either click the Find button, which displays a list of employees, or type in the Employee ID, before any access to the other tabs is available. With security permission, the User may access the other screens by clicking a selected tab. All accessible data*

displays only one employee ID at a time. If a User has multiple employees to change she/he will need to return to the Employee Tab screen for each new employee ID.

## JOB ASSIGNMENT/WEEKLY SCHEDULE TAB

(PW,67)

**Oracle Developer Forms Runtime - Web**  
System Employee Site Time External Reports Help Window

**Employee Maintenance Module** 13-Nov-2008  
TAC500F0 Employee Maintenance Module Restricted Information

Employee Job Assign/Weekly Daily Schedules Prior Assignments Leave Information

Employee ID: 185-19-2174 Name: GUSS, MIGUEL ✓ Clear  
Last/First/MI Find

Type of JA: B FLSA: N Route: 000000  
Start Yr Pk: 2000.05.7 Em Type: C Limited Hours: Add  
End Yr Pk: Fin Number: 474634 WW Type: 5 Delete  
DA / RSC: 410 P Finance Unit: 0000 Diff Wk/JA  
RSC Subc: 0 Pay Location: 104 Auto Lunch  
Po Level: 05 LDC: 1400 Var EAS Ind  
Step Code: A Oper / Lk: 0300 00 Save

**Weekly Schedule**

	Sched ID	Rotating Week	Begin	End	Lunch Begin	Lunch Duration	Schedule Type
Primary:	0	1	14.00	22.50	18.00	00.50	F
Holiday (10/4):							

Help

Each employee MUST have at least one base job assignment active for any given year, pay period and week, unless the employee's status is "deleted". This screen comes up when the User has clicked on the Job Assignment/Weekly Schedule Tab from the Employee Maintenance module. Much of the information on this screen is summarized in the Clock Ring Editor when you click on the "Job Assignment" button.

The Add button, Update button, and Delete button are available only when the User has permissions for these. The Employee ID and Name boxes are carried over from the Employee Tab and the User cannot move into or click on these items.

Temporary assignments of a week or longer are entered here with a "T" in the "Type of Job Assignment" box. If the job assignment is a Temporary job, it may be deleted. Base and Dual assignments may not be deleted.

On the right side of the form, there are three boxes. "1261," when checked, will automatically generate rings. "Auto lunch," when checked, will automatically generate lunch rings based on the employee's schedule. "Variable EAS Indicator" allows eligible EAS employees to be paid premiums to which they may be eligible if their schedule is temporarily changed. When this box is checked the employee will be held until the final upload on Monday so that any premium worked may be adjusted before upload.

The Weekly Schedule is populated weekly from the download procedure, but, if the User has made modifications or added new schedules for an employee, the most recent record will be used.

#### **DAILY SCHEDULES TAB (PW,69)**

Oracle Developer Forms Runtime - Web

System Employee Site Time External Reports Help Window

Employee Maintenance Module

TAC500F0 Employee Maintenance Module 13-Nov-2000 Restricted Information

Employee Job Assign/Weekly Daily Schedules Prior Assignments Leave Information

Employee ID: 198-92-0556 Name: SMITH ANNE Effective Start Date: 2000-05-2

Type Of Job Assignment: B

	Tour		Lunch		Day Off	Schedule	Holiday	Sunday Premium	Act. Orig.
	Begin	End	Begin	Duration					
SATURDAY	07:00	15:50	11:00	00:50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUNDAY	07:00	15:50	11:00	00:50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MONDAY	07:00	15:50	11:00	00:50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TUESDAY	07:00	15:50	11:00	00:50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WEDNESDAY	07:00	15:50	11:00	00:50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
THURSDAY	07:00	15:50	11:00	00:50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FRIDAY	07:00	15:50	11:00	00:50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clear Edit Add Delete Diff Wk/JA Save Close Help

The purpose of the Daily Schedules Tab is to allow modifications to be made, on a day to day basis, for the employee's schedule. It is only accessible after the User has brought up an employee on the Employee Tab. It is populated with the schedule information from the most current base assignment and weekly schedule.

In the "Type of Job Assignment," you will see a "B" for Base assignment or a "T" for a temporary job assignment. You can toggle back and forth between the base and temporary assignment by clicking into the Job Assignment Tab and clicking on the "Diff Wk/JA" button.

Supervisors may have access to make temporary schedule changes for their employees.

## TEMPORARY SCHEDULE CHANGE (PW,70)

In the Employee Maintenance Module, call up the employee you were previously assigned. Move to the Daily Schedules Tab. Click on the 'x' in one of the boxes in the "Day Off" column to turn it off, and click on another box (any day) to make the 'x' appear.

You have now changed someone scheduled day off for the current week. Make sure you're in the correct PP and week. Also, be very careful as to which day you change: if the wrong day is indicated, the employee could get LWOP for one day and OT for the other day.

The TACS system will re-compute for the employee which day is the holiday if there is a change of days off in a holiday week. It will also re-compute the Sunday premium if it is affected by a change of off days. **NOTE: If an employee requests the change (3189) for personal convenience, he/she is not entitled to Sunday premium even if the employee works on Sunday. The supervisor should uncheck the Sunday Actual Box.**

Unless the change is for personal convenience, a change in starting time could result in the employee becoming eligible for out-of-schedule premium. When management changes the employee's bid schedule, the Out of Schedule box must be checked, and form 1723 completed, for the employee to receive this premium. (Out of schedule premium may also be entered using code 073 in the Clock Ring Editor.)

## LEAVE INFORMATION TAB (PW,71)

Oracle Developer Forms Runtime - Web  
System Employee Site Time External Reports Help Window

Employee Maintenance Module 13-Nov-2000 Restricted Information

TAC500F0 Employee Maintenance Module

Employee | Job Assign/Weekly | Daily Schedules | Prior Assignments | Leave Information

Employee ID: 198-92-0556 Name: SMITH, ANNE C

by leave year - by ipsoe 12 month period

Balances		Hours Used		FMLA Information	
Annual:	22.51	Annual:	00	Work Hours:	2223.38
Sick:	178.95	Sick:	0.00	Hours Used:	00
		LWOP:	00	SLDC Used:	00

Clear Find Add Delete Print View JA

Save Close Help

The Leave Information Tab, in the Employee Maintenance Module, is populated from the Employee Tab, based on the employee ID. The user's security clearance is checked before access to this information is allowed. Leave balances are downloaded from the Payroll System on the Eagan mainframe each Thursday. The leave totals are based on paid hours and even though they are downloaded each week they are not updated until after an employee is paid and updates to the main frame are complete (biweekly).

The Leave information is for display purposes only and is not changed during the week. The Leave information is based on the Leave Year. SLDC cannot exceed 80 hours in a calendar year. In order to be eligible for FMLA, a minimum of 1250 hours must have been worked over the past 12 months. No more than 480 hours of FMLA leave may be used in a calendar year.

*DRAFT*

TACS TRAINING



*DRAFT*

TACS TRAINING

**MODULE FIVE -- TACS AND THE  
ELECTRONIC BADGE READER**

*DRAFT*

TACS TRAINING

**INTRODUCTION** (PW,75)

The major difference for badge users in PSDS offices is that the upper left button on the Operations portion of the EBR is now referred to as the Base operation. If a user wants to clock in on his/her Base operation, all s/he needs to do is press the BT button and swipe the badge. Unless a user chooses otherwise, the base operation button will be active. If a user wants to clock in on a different operation, then it is business as usual and s/he presses BT and the appropriate operation button.

**BASE OPERATION**

[BT] [LV]	<input type="text"/>	<input type="text"/>	<input type="text"/>										
[OL] [HL]	<input type="text"/>	<input type="text"/>	<input type="text"/>	1	2	3	4	5	6	7	8	9	Clear
[IL ] [OT]	<input type="text"/>	<input type="text"/>	<input type="text"/>										←
[MV] [VEH]	<input type="text"/>	<input type="text"/>	<input type="text"/>										Exit
[ET] [TR]	<input type="text"/>	<input type="text"/>	<input type="text"/>	Sel	0	Acc							Enter

When badge users Move, the base operation will be lit and the employee must choose an operation if different from base.

The other changes to the EBR concern the functionality of the second row of preprogrammed codes. Authorization of leave, higher level, and overtime have been assigned buttons, in addition to entry of vehicle information and transfer of employee hours. Use of these buttons is explained in the succeeding pages.

**NOTE: At this time the EBR will only accept 3-digit operation numbers, and 2-digit hours codes.**

**STAND UP TALK FOR ALL EBR USERS (PW,76)**

We are cutting over to a new timekeeping system called TACS (Time and Attendance Collection System). The Electronic Badge Readers (EBR) have been slightly modified to work with this new system.

**The first change you will notice is the Base Operation button. You have been assigned to a particular operation to which all of your hours are charged, unless you MV to a different operation. When clocking into the base operation, the system will allot your hours to your base operation—which may be different than the base operations of the persons ahead and behind you. As long as the base operation button is depressed, each person's hours will be charged to his/her particular base operation. You can of course clock in to a different operation than your base by selecting that operation number.**

Be aware that the new EBR is faster and makes a different tone when it accepts your badge. If it doesn't accept the badge, it makes a squawk. When you hear a beep, your badge was accepted. Don't keep swiping your badge because you don't hear the sound you used to hear.

You also need to be aware of the lower two buttons in the second column of buttons. The Vehicle (VEH) button is used when you need to enter vehicle information because a vehicle badge is not available. The Transfer (TR) button is used only when your time is being charged to a different Finance Number.

Remember, you are your own best timekeeper. You can guarantee that you are paid correctly if you use your badge to discharge your timekeeping responsibility correctly.

### LETTER CARRIER NOTE (PW,77)

The move ring is utilized to change route numbers when serving different routes on the same day. The carrier utilizes the MOVE, and selects the OPR Code. The carrier can key in the 3-digit OPR or 5-digit OPR-LU code, if the LU is applicable. If the carrier is using the numeric keypad to key in the operation number and is required to enter the LU, the carrier must press the SEL key, prior to entering the LU. The Route Number will be the number to which the carrier is moving.

The MOVE ring is also used when the carrier leaves the office to a street operation, and when the carrier returns to the office from the street. It can also be used to enter route changes (moves) after the fact when the EBR is unavailable or malfunctioning. When it is used after the fact to enter prior data for that day, the route number must be entered.

Once the route number has been entered, the EBR screen will display:

---

Move -> OPR: 721-00 RT:00014  
enter TIME or swipe VEH/EMP BADGE

---

The employee will then enter the time that the employee moved to that route and/or operation. For example, if the employee enters 1392 (hours and hundredths), the EBR screen will display:

Move -> OPR: 721-00 RT:000014 13.92  
swipe VEHICLE or EMPLOYEE BADGE

## USING VEHICLE BADGES

### Carriers (PW,78)

When carriers record vehicle information, the vehicle badge is always swiped first, prior to swiping the employee badge. If the vehicle badge is unavailable, the employee presses the VEH key and enters the 9-digit vehicle ID number. If the carrier presses the VEH key, the screen prompts:

Move -> OPR- 721 Rte:00014  
enter VEHICLE

The carrier enters the vehicle number using the numeric keypad (i.e. 123456789).

Once the vehicle badge is swiped or the vehicle ID number is entered and the carrier is leaving for the route (OPR code 721), the screen prompts the carrier to swipe the employee badge.

Move -> OPR: 721-03 Rte:00014 VEH OUT  
swipe EMPLOYEE BADGE

When the vehicle badge is swiped or the vehicle ID number is entered and the carrier is returning to the office (OPR code 722), the screen prompts the carrier to enter the Odometer reading.

Move -> OPR: 721-03 Rte:00014 VEH IN  
ENTER ODOMETER:

The carrier can enter up to six digits on the EBR for the odometer reading. Once the carrier has entered the odometer reading, the carrier must press ENTER. If for example, the odometer reading is 321, the 321 is keyed in and the carrier presses ENTER. **The EBR will automatically insert the leading zeroes.** The screen then prompts the carrier to swipe the employee badge.

Move > OPR: 722 03 Rte:00014 VEH IN  
swipe EMPLOYEE BADGE ODOMETER:.000321

The carrier swipes the employee badge.

#### USING VEHICLE BADGES

##### Other Employees (PW,79)

When an employee is required to record vehicle information on the EBR, the employee performs the same procedures as a carrier. For example, after entering OPR Code 760-01, the employee swipes the vehicle badge or presses the VEH key to enter the 9-digit vehicle ID number, if the vehicle badge is unavailable.

**Note: The screen does not prompt the employee to swipe the vehicle badge because it does not recognize the OPR code as requiring a vehicle.**

If the employee presses the VEH key, the screen prompts:

Move -> OPR: 760-01  
enter VEHICLE #:

The employee enters the 9-digit vehicle number using the numeric keypad (i.e. 123456789).

Once the vehicle badge is swiped or the vehicle ID number is entered, the screen prompts the employee to indicate the departure {(2) OUT} or return {(1) IN} of the vehicle. The employee will be required to enter the odometer reading when the employee returns {(1) IN} to the office.

Move    OPR: 760    VEH  
Press (1) In or (2) Out with Vehicle

If departing, the employee presses (2), and the screen prompts the employee to swipe employee badge.

Move -> OPR: 760-01    VEH OUT  
swipe EMPLOYEE BADGE

If returning, the employee presses (1), and the screen prompts the employee to enter the Odometer reading.

Move -> OPR: 760-01    VEH IN  
ENTER ODOMETER:

The employee can enter up to six digits on the EBR for the odometer reading. Once the employee has entered the odometer reading, the employee must press ENTER. If, for example, the odometer reading is 321, the 321 is keyed in and the employee presses ENTER. **The EBR will automatically insert the leading zeroes.** The screen then prompts the employee to swipe the employee badge.

Move ->    OPR: 760 1    VEH IN  
swipe EMPLOYEE BADGE    Odometer 000321



The employee swipes the employee badge.

Special note: before a badge is swiped, the employee must make sure, the correct clock ring type (function) and opr keys (if applicable) are lit.

### **AUTHORIZATION CLOCK RINGS (PW,81)**

There is one password for all authorizations. Authorizations must be input for each day separately, not the entire week in one clock ring. For example, if an employee is scheduled for 40 hours of leave for the week, you must input the leave to be taken each day. You cannot input the 40 hours as one authorization. The system will reject it. When the EBR prompts you for the employee badge, you can either swipe the badge or enter the SSN of the employee on the numeric key pad.

### **OT – Overtime (PW,81)**

Supervisors who are authorized to input Overtime authorizations may do so at the EBR. The password is needed for this type of authorization. The following is an example of how to authorize 2 hours OT beginning at 1500 on March 21.

The first step of the authorization for overtime is pressing the OT key. The clock ring type (transaction) keys are located on the left side of the EBR keyboard.

When OT is selected, the EBR displays the following screen:

OT Auth  
swipe AUTHORIZER BAGDE

When the supervisor swipes his or her badge through the EBR, the screen prompts:

OT Auth  
Enter PASSWORD

When the four-digit password has been entered correctly, the screen prompts:

OT  
enter EMPLOYEE # from pad or swipe BADGE

When the employee's badge has been swiped through the EBR or the ID number is entered from the numeric keypad, the screen will display the employee's social security number as follows:

OT 123-45-6789  
enter OT HOURS Authorized

After the number of hours of overtime (0200) are entered from the numeric keypad in Hours and hundredths, the screen display prompts:

OT 123-45-6789 02:00  
Month:

Enter the calendar month in two digits (03) from the numeric keypad, the screen display prompts:

OT 123-45-6789 02:00 03

Day:

Enter the calendar day (21) the Over-time is scheduled to begin, not necessarily the tour day. After the day is entered from the numeric keypad, the display prompts:

OT 123-45-6789 02:00 03/21

enter START TIME (HH.hh):

After start time (1500) is entered from the numeric keypad, the screen display prompts:

OT 123-45-6789 02.00 03/21 15.00

enter Acc to accept – Clear to reject

If data is correct, press the "ACC" key to process the transaction. The screen will remain locked/latched in for the next OVERTIME transaction. If the data is the same for subsequent employees, swipe the employee's badge and press the "ACC" key to process/complete that transaction. Continue this process until all employees have been authorized.

If data for the next employee or group of employees is different, press the "CLEAR" key, enter the new information and start again. You must press the "CLEAR" key after the last transaction has been completed. If you do not enter a transaction within a short period of time, the system will automatically clear the screen.

**Note: Supervisors are not allowed to input overtime authorizations for themselves.**

**Overtime Authorization Input Overview: (PW,84)**

- 1. Press the "OT" key**
- 2. Swipe Authorizer Badge**
- 3. Enter Password**
- 4. Swipe Employee Badge or enter ID number**
- 5. Enter Number of Overtime Hours Authorized (4 digits - Hours and hundredths)**
- 6. Enter Month (2 digits)**
- 7. Enter Calendar Day Overtime is to Begin (2 digits)**
- 8. Enter Time Overtime is to Start (4 digits - Hour and Hundredths)**
- 9. Press the "ACC" key to complete the transaction (or CLEAR/EXIT to start over)**
- 10. If authorizing a group of employees for the same date, amount and start time, swipe the next employee badge then press the "ACC" key. Continue this process until all employees have been authorized.**
- 11. Press the "CLEAR" or "EXIT" key after the LAST transaction has been completed**

**Authorizing Leave (PW,85)**

Supervisors are authorized to input leave authorizations via the EBR. The password is needed for this type of authorization.

The following is an example of how to input an authorization for 8 hours of sick leave (code 056) beginning at 0700 on March 21:

The first step of the input for Leave is pressing the LV key, which is located on the left side of the EBR keyboard.

When LV is selected, the EBR displays the following screen:

A rectangular box representing a screen display. Inside, the text "Leave" is on the first line and "swipe AUTHORIZER BADGE" is on the second line.

When the supervisor swipes his or her badge through the EBR, the screen prompts:

A rectangular box representing a screen display. Inside, the text "Leave" is on the first line and "enter PASSWORD:" is on the second line.

When the four digit password has been entered correctly, the screen prompts:

A rectangular box representing a screen display. Inside, the text "LV" is on the first line and "enter EMPLOYEE # from pad or swipe BADGE" is on the second line.

When the employee's badge has been swiped through the EBR, or the ID number is entered from the numeric keypad, then the screen will display the employee's social security number as follows:

LV 123-45-6789  
enter LEAVE CODE from numeric key pad

When the 2-digit leave code (56) has been entered from the numeric keypad, the screen displays:

LV 123-45-6789 [56]  
enter LEAVE HRS Authorized (HH.hh):

After the total number of leave hours are entered from the numeric keypad in hours and hundredths, the screen display prompts:

LV 123-45-6789 [56] 08.00  
Month:

After the calendar month (03) is entered from the numeric keypad, the screen display prompts:

LV 123-45-6789 [56] 08.00 03  
Day:

Enter the actual calendar day (21) the leave is scheduled to begin (not necessarily the tour day). After the day has been entered from the numeric keypad, the screen display prompts:

LV 123-45-6789 [56] 08.00 03/21  
enter START TIME (HH.hh):

After start time for Leave (Hours and hundredths) is entered (0700) from the numeric keypad, the screen display prompts:

LV 123-45-6789 [56] 08.00 03/21 07.00 S  
ACC >Accept ENTER>Reason SEL>Unsched/Sched

If the reason code for the leave entered is "00," just press ACC(ept). If the reason code for the leave entered is other than "00," press the ENTER button and input the 2-digit reason code. You may change the "S" (scheduled) to "U" (unscheduled) prior to ACC(ept) by pressing the SEL(ect) button. NOTE: A list of applicable Reason Codes may be found in Appendix 3.

If data is incorrect, press the CLEAR or EXIT key and start again.

After the "ACC" key is pressed to process the transaction, the screen will remain locked in for the next identical LEAVE transaction. You must press "CLEAR" after the last transaction has been completed.

Note: all leave transactions must be supported by form 3971.

### **No Lunch (PW,87)**

When NO LUNCH is approved, the authorization can be entered at the EBR. Follow the instructions for LEAVE and use Code 93 (No Lunch Authorized).

**Leave Authorization Input Overview: (PW,88)**

- 1. Press the "LV" key**
- 2. Swipe Authorizer Badge**
- 3. Enter Password**
- 4. Swipe Employee Badge or enter ID number**
- 5. Enter Leave Code**
- 6. Enter Number of Hours Authorized (4 digits - Hours and hundredths)**
- 7. Enter Month (2 digits)**
- 8. Enter Calendar Day Leave is to Begin (2 digits)**
- 9. Enter Time Leave is to Start (4 digits - Hours and hundredths)**
- 10. Enter Reason Code and select Scheduled or Unscheduled.**
- 11. Press the "ACC" key to complete the transaction (or CLEAR/EXIT to start over)**
- 12. Press the "CLEAR" or "EXIT" key after the LAST transaction has been completed**




**Authorizing Higher Level (PW,89)**

Supervisors who are authorized to input Higher Level authorizations may do so at the EBR. The password is needed for this type of authorization. In the following example, 8 hours of higher level are authorized for Level 15, RSC E, beginning at 1000 on March 21.

Note: Higher Level authorization inputs are not required for qualified employees moving to selected operation numbers (see automatic higher level) provided they meet the base criteria established for those operation numbers.

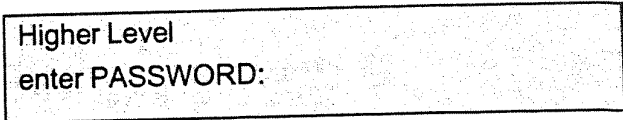
The first step of the input for the authorization of HL is pressing the HL button. The clock ring keys are located on the left side of the EBR keyboard.

When HL is selected, the EBR displays the following screen:



Higher Level  
swipe AUTHORIZER BADGE

When the supervisor swipes his or her badge through the EBR, the screen prompts:



Higher Level  
enter PASSWORD:

When the four digit password has been entered correctly, the screen prompts:

HL  
Enter EMPLOYEE # from pad or swipe BADGE

When the employee's badge has been swiped through the EBR or the ID number is entered from the numeric keypad, the screen will display the employee's social security number as follows:

HL 123-45-6789 E-  
use SEL to select RSC – use ACC to accept

If E is not the Rate Schedule Code (RSC) you want, use the SEL key to scroll through the valid RSC listing. Normally, you will use only 4 RSC codes—M=Mail Handlers, P=Clerks, Q=City Letter Carriers, and E=Executive and Administrative/Casuals. When the desired RSC is displayed, press the ACC key. The screen prompts:

HL 123-45-6789 E-  
enter LEVEL from numeric keypad

After the level (15) is entered from the numeric keypad, the screen display prompts:

HL 123-45-6789 E-15  
enter HL HOURS Authorized (HH.hh):

After the hours authorized (0800) have been entered from the numeric keypad, the screen display prompts:

HL 123-45-6789 E-15 08.00  
Month:

Enter the calendar month (03) in two digits from the numeric keypad. The screen display prompts:

HL 123-45-6789 E-15 08.00 03  
Day:

Enter the calendar day (21) the higher level is scheduled to begin, not necessarily the tour day. After the day is entered from the numeric keypad, the display prompts:

HL 123-45-6789 E-15 08.00 03/213-27  
enter START TIME (HH.hh):

Enter the time the higher Level is to BEGIN (Hours and hundredths). After the start time (1000) has been entered from the numeric keypad, the screen display will prompt:

HL 123-45-6789 E-15 08.00 03/21 10.00  
enter ACC to accept – Clear to reject

If data is correct, press the "ACC" key to process the transaction. The screen will remain locked in for the next identical HIGHER LEVEL transaction. You must press "CLEAR" after the last transaction has been completed.

If data is incorrect, press the CLEAR key and start again.

Note: All higher level must be supported by an approved assignment order (1723).

**Higher Level Authorization Input Overview: (PW,92)**

- 1. Press the "HL" key**
- 2. Swipe Authorizer Badge**
- 3. Enter Password**
- 4. Swipe Employee Badge or enter ID number**
- 5. Press the "SEL" key to select the RSC (Rate Schedule Code)**
- 6. Press the "ACC" key to accept the RSC selected**
- 7. Enter the Level (2 digits)**
- 8. Enter Number of Higher Level Hours Authorized (4 digits Hour and hundredths)**
- 9. Enter Month (two digits)**
- 10. Enter Calendar Day Higher Level is to Begin (2 digits)**
- 11. Enter Time Higher Level is to Start (4 digits Hours and hundredths)**
- 12. Press the "ACC" key to complete the transaction (or CLEAR/EXIT) to start over)**
- 14. Press the "CLEAR" or "EXIT" key after the LAST transaction has been completed**

Note: In the event more hours are worked at the higher level than were originally authorized, a second HL authorization must be made for the additional hours, or change the original authorization in the clock ring editor.

**AUTOMATIC HIGHER LEVEL (PW,93)**

TACS will automatically credit higher level hours for specific categories of working certain positions, once the employee selects the operation number. The employee must have the proper LDC and D/A code in the Employee Master File for the system to generate the higher level. For example, a mail processor, level 4 with an LDC 11 and a D/A 41-0, who is assigned to manual cases and instructed to move to operation 030 is paid level 5 for the amount of time the employee is in that operation. The higher level will automatically end whenever the employee moves to an operation number for which higher level is not payable, or punches OL or ET.

Automatic Higher Levels are generated for the following positions:

**1. OCR Operator (Mail Processor) to Manual**

*Employee's Base Criteria:*

*Level = P-04*

*LDC = 11*

*D/A = 11-0, 31-0, or 41-0*

*Automatic higher level as P-05 for hours in*

*Operation Numbers: 030-079, 100-104,*

*111-130, 150-179*

2. **Mailhandler to "Mark," Tow (Mule) or Forklift Operator**

*Employee's Base Criteria:*

*Level = M-04*

*LDC = 17*

*D/A = 12-0, 32-0, 42-0*

*Automatic higher level as M-05 for hours in*

*Operation Numbers: 011-016, 225, 229*

3. **CFS Clerks to Mail Processing**

*Employee's Base Criteria:*

*Level = P-04*

*LDC = 49*

*D/A = 11-0, 31-0, or 41-0*

*Automatic higher level as P-05 for hours in*

*Operation Numbers: 030-038, 040-044*

**SPECIAL NOTE:** DO NOT assign Operation Numbers 011 through 016 to Mailhandlers (Level M-04) "Base".

**Automatic Higher Level - Bulk Mail Centers (PW, 95)**

**1. Clerk to Trainer - On the Job, Clerk Keying**

*Employee's Base Criteria:*

*Level = P-04 or P-05*

*LDC = 12, 13, 14, 15*

*DIA = 11-0, 31-0, 41-0, 81-0*

*Automatic higher level as P-06 for hours in  
Operation Number 197 or 198*

**2. Mail Flow Controller - Intermittent**

*Employee's Base Criteria:*

*Level = P-05 or P-06, M-04 or M-05*

*LDC = 12, 13, 14*

*DIA = 11-0, 31-0, 41-0, 81-0, 12-0, 32-0, 42-0*

*Automatic higher level as E-14 for hours in  
Operation Number 119.*

**3. Dock Clerk**

*Employee's Base Criteria:*

*Level = P-05*

*LDC = 12, 13, 14*

*DIA = 11-0, 31-0, 41-0*

*Automatic higher level as P-06 for hours in  
Operation Number 540-549.*

**4. Bulk Mail Technician**

*Employee's Base Criteria*

*Level = P-05*

*LDC = 12, 13, 14, 17, 18*

*DIA = 11-0, 31-0, 41-0, 81-0*

*Automatic higher level as P-06 for hours in  
Operation Numbers 563, 569.*

5      **Mailhandler to Sack Sorter**

*Employee's Base Criteria:*

*Level =M-04*

*LDC =13, 14*

*D/A =12-0,32-0,42-0*

*Automatic higher level as M-05 for hours in  
Operation Number 140-143.*

6.      **Mailhandler to Tow (Mule) or Fork Lift Operator**

*Employee's Base Criteria:*

*Level =M-04*

*LDC = 12, 13, 14, 17*

*D/A =12-0,32-0,42-0*

*Automatic higher level as M-05 for hours in  
Operation Numbers 220-229.*

7.      **Mailhandler to Trainer - On The Job Keying**

*Employee's Base Criteria:*

*Level =M-04*

*LDC = 12, 13, 14, 15*

*D/A =12-0,32-0,42-0*

*Automatic higher level as M-05 for hours in  
Operation Number 197 and 198.*



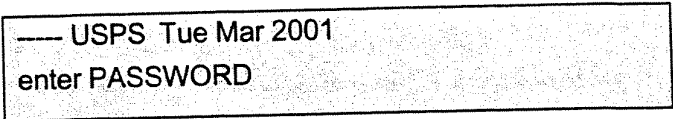
**Authorizing Missing Clock Rings (PW,97)**

When an employee is missing a basic Clock Ring(s), the employee is in an error status and will be listed on **the Clock Ring Error Report**. If the supervisor inputs the missing ring, a Form 1260 or 1261 is not required. However, if the timekeeper is inputting the clock rings, a Form 1260 or 1261 must be submitted to the timekeeper for the missing ring as documentation and authorization. Not all "missing ring" conditions cause an error report. For example, a carrier moves to another route while on the street. Such rings should be input at the EBR as soon as the data is available to the supervisor.

A supervisor can enter the missing clock ring(s) at the EBR or add the missing ring to the employee's record (from the 1260 or 1261) using the "Add" option on the Transaction Editor.

The Missing Ring Mode allows supervisors to enter missing clock rings at the EBR. The following is an example of how to input a missing Begin Tour for an employee on March 22 at 0850 in Operation 130.

The first step for entering the missing clock ring at the EBR is to press the 'Clear' key to clear the screen. When the supervisor swipes his or her Authorizer badge through the EBR, the screen prompts:



--- USPS Tue Mar 2001  
enter PASSWORD

When the four digit password has been entered correctly, the screen prompts:

Add Missing Ring	(3) Volume Data
Delete Bad Ring	Select

When (1) Add Missing Ring is selected the screen prompts:

Add Missing Ring For 00/00 0000
Month –

When the two code digit for the Month (03) has been entered correctly, the screen prompts:

Add Missing Ring For 03/00 0000
Day:

Enter the calendar day (22) that the missing clock rings is for. Remember, midnight (0000) starts the new calendar day. After the day has been entered, the screen prompts:

Add Missing Ring For 03/22 0000
Hour:

Enter the actual time in hours and hundredths (0850) for the missing clock ring from the numeric keypad. After the time for the missing clock ring has been entered, the screen prompts:

Add Missing Ring For 03/22 0850
enter FUNCTION

Press the appropriate Function key for the missing clock ring. Remember to enter the Operation number when selecting "BT", "EL" and "MV" functions. Operation numbers are not used when

selecting "OL" and "ET" functions. After the function has been selected (BT), the screen prompts:

Begin Tour Oper:000-LU  
enter OPR or SEL LU or swipe BADGE:

After the operation number (130) has been entered, the screen prompts:

Begin Tour Oper:130  
enter Local Unit or swipe BADGE

Swipe the employee's badge to complete the transaction. The screen will remain locked in for the next MISSING CLOCK RING transaction. You must press "CLEAR" after the last transaction has been completed.

**Missing Clock Ring Authorization Input Overview: (PW,100)**

- 1. Press the "CLEAR" key, then Swipe Authorizer Badge**
- 2. Enter Password**
- 3. Select (1) Missing Clock Ring**
- 4. Enter Month (2 digits) of Missing Clock Ring**
- 5. Enter Day for the Missing Clock Ring (2 digits)**
- 6. Enter Time for the Missing Clock Ring (4 digits - Hour and hundredths)**
- 7. Press the appropriate Function Key for the Missing Clock Ring (BT, OL, EL, W or ET)**
- 8. Enter the appropriate Operation Number if Missing Clock Ring is for a BT, IL or NW**
- 9. Swipe Employee Badge or enter ID number**
- 10. Press the "CLEAR" key after the LAST transaction has been completed**

### Deletion of Erroneous Clock Rings (PW,101)

When an employee has erroneous clock ring(s), the employee will be listed on the Clock Ring Error Report. If the supervisor deletes the ring(s), no documentation is required. However, if a timekeeper deletes the clock ring(s), documentation is required to authorize the timekeeper to do so. Not all erroneous rings cause an error report. For example, a clerk clocked on a carrier's operation in error will not show up as an error. When erroneous ring(s) are discovered, they should be deleted and the correct ring(s) entered.

The Delete Bad Ring Mode allows supervisors to delete the rings at the EBR. It is the same as the Missing Clock Ring Mode except, after entering the password, select (2) Delete Bad ring when prompted. The following is an example of how to delete a bad begin tour ring for an employee on March 22 at 0850 in Operation 130.

**Note: To delete a ring, all of the information, including the date, month, hour, function, and operation number must be entered exactly as listed on the error report.**

The first step for deleting bad ring(s) at the EBR is to press the "Clear" key to clear the screen. When the supervisor swipes his or her Authorizer badge through the EBR, the screen prompts:

----- USPS ETC Tue Mar 22,2001  
enter PASSWORD.

When the four-digit password has been entered correctly, the screen prompts:

Add Missing Ring  
Delete Bad Ring                      Select

When (2) Delete Bad Ring is selected, the screen prompts:

Delete Bad Ring For 00/00 0000  
Month –

When the two digit code for the Month (03) has been entered correctly, the screen prompts:

Delete Bad Ring For 03/00 0000  
Day:

Enter the calendar day (22) of the bad clock ring. (Remember, midnight 0000} starts the new calendar day). After the day has been entered, the screen prompts:

Delete Bad Ring For 03/22 0000  
Hour:

Enter the actual time in Hours and hundredths (0850) for the bad clock ring from the numeric keypad. After the time for the bad clock ring has been entered, the screen prompts:

Delete Bad Ring For 03/22 0850  
enter FUNCTION

Press the appropriate Function key for the bad clock ring. Remember to enter the operation number when selecting "BT", "OL" and "MV" functions. Operation numbers are not used when selecting "OL" and "ET" functions. After the function has been selected (BT), the screen prompts:

Begin Tour Oper:000-LU  
enter OPR or SEL LU or swipe BADGE:

The EBR will only accept a 5-digit number. DO NOT enter the trailing zero for the operation number. Instead of entering 1300-00, enter 130-00. After the operation number (130) has been entered, the screen prompts:

Begin Tour Oper:130  
enter Local Unit or swipe BADGE

Swipe the employee's badge to complete the transaction. The screen will return to the menu screen to select your next entry. You must press "CLEAR" after the last transaction has been completed.

**Delete Bad Clock Ring Authorization Input Overview:**

*(PW,104)*

1. Press the "CLEAR" key, then Swipe Authorizer Badge
2. Enter Password
3. Select (2) Delete Bad Clock Ring
4. Enter Month (2 digits) of Bad Clock Ring
5. Enter Day for the Bad Clock Ring (2 digits)
6. Enter Time for the Bad Clock Ring (4 digits - Hour and hundredths)
7. Press the appropriate Function Key for the Bad Clock Ring (BT, OL, IL, MV or ET)
8. Enter the appropriate Operation Number if Bad Clock Ring is for a BT, IL, or MV
9. Swipe Employee Badge or enter ID number  
Press the "CLEAR" key after the LAST transaction has been completed



**Restarting the EBR with an Authorizer Badge (PW,105)**

1. Swipe the Authorizer badge.
2. Press the (SEL) key until the correct calendar day of the week appears. Then press the (ACC) key.
3. Enter the 2-digit numeric code for the month.
4. Enter the 2-digit numeric code for the day.
5. Enter the 2-digit numeric code for the year.
6. Enter the 2-digit numeric code for the hour.
7. Enter the 2-digit numeric code for the minute.\*
8. Enter the 2-digit numeric code for seconds.
9. If all parameters are correct, press the (ACC) key to accept the setting. If the setting is incorrect, press the (Clear) key to reject.

Setting Clock	Fri	11/27/00	10:05:00
Enter ACC to Accept		CLEAR to Reject	

\*Minutes are used for manual resetting. The clock will automatically convert to hundredths upon pressing the (ACC) key.

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TACS TRAINING

*DRAFT*

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## **APPENDICES**

*DRAFT*

TACS TRAINING

## Appendix 1 (PW,109)

## KEYBOARD SHORTCUTS

## SHOW KEYS

Function

Keys

Function

Keys

Function	Key
Display Error	Shift+Ctrl+E
Down	Down
Edit	Ctrl+E
List of Values	F9
Next Field	Tab
Next Record	Down
Previous Field	Shift+Tab

Previous Record	Up
Print	Ctrl+P
Return	Return
Scroll Down	PageDown
Scroll Up	PageUp
Show Keys	Ctrl+K
Up	Up

## BUTTON SHORTCUTS

Button Name	Short-Cut
Clear	Alt-I
Find	Alt-F
Add	Alt-A
Delete	Alt-D
Change	Alt-H
Save	Alt-S
Close	Alt-C
Help	Alt-P

Button Name	Short-Cut
Duplicate	Alt-U
Calc	Alt-L
PreProc	Alt-O
Job Assign	Alt-G
Add -CANCEL	Alt-N
Change -CANCEL	Alt-N
Next Emp	Alt-N
Conv Table	Alt-Q

Button Name	Short-Cut
Add -CANCEL	Alt-N
Change -CANCEL	Alt-N
Next Emp	Alt-N
Conv Table	Alt-Q
Run	Alt-U
Print MUA	Alt-W
Add All Fin	Alt-N
Force Save	Alt-Y

## Appendix 2 (PW,110)

### TACS Reports

#### Active Operations Reports (TAC140R0)

- **Active Operations Report** is a listing of operations and local units that have been "turned on" or made valid for a particular finance number.
- **National Authorized Operations Report** provides a listing of nationally authorized operations, and CAG office and LDC Codes for which they are authorized.
- **Operation Errors** provides a list of employees who are assigned to base operations that have been deactivated. This report should be run in the TACS Control Site when changes to operation numbers are announced.

#### Badge Reports (TAC050R0)

Badge Reports Module allows you to create and run 3 reports: for Badge Assignment, Unassigned Badges, and Badge Type Listing.

#### Clock Ring Reports (TAC800R0)

- **Clock Ring Errors Report** will display errors on a clock ring or set of clock rings that can not be posted for an employee. The report will also show employees who do not have time posted for a scheduled day or who do not crossfoot any day.
- **Missing Time Report** will show employees who do not have time posted for a scheduled day or who do not crossfoot on any day.

- **Overtime Alert Report** lists employees in an overtime status for the week or who are approaching overtime for the week.
- **Overtime and Leave Report** will list employees who have both overtime and leave on the same day.
- **Raw Ring Errors Report** shows raw ring errors.
- **Ring Disallowance Report** lists employee clock-generated badge swipes that have been changed by a supervisor or timekeeper so that time is, in effect, "disallowed."
- **Self-Adjustment Report** lists all the users who made any type of change to their own clock rings.
- **Tour Deviations Report** is designed to allow the user the ability to select employees who deviate from their assigned schedule and/or lunch amounts.
- **Unauthorized Overtime Report** lists employees with overtime worked which exceeds the amount of overtime authorized.

#### **Employee Reports (TAC500R0)**

- **Authorized Higher Level Report** lists employees who have been authorized Higher Level.
- **Automatic Higher Level Report** lists employees who have worked an operation that entitles them to automatic higher level.
- **Employee Everything Report** lists almost every thing in the TACS database for a particular employee for a particular year, pay period and week.
- **Employee File Comparison Report** lists TACS employees found with differences between what is in the master file in Minneapolis and TACS.
- **Employee Listing Report** lists the employees within the office.

- **Employee Moves Report** displays the operations an employee has worked during the week.
- **Employees on the Clock Report** will display all employees currently on the clock.
- **Higher Level Details Report** will generate a report listing those employees on long term higher level details.
- **LTD Duty/REHAB Report** displays for each person on limited duty or rehabilitation, total hours to date for each operation. These are persons on Operation 959, or for whom the base Labor Distribution Code is 6900.
- **Carrier Moves Report** displays moves for letter carriers only.

#### **Finance Reports (TAC100R0)**

- **Hours and Dollars Report** displays the hours worked and an approximation of the cost, in dollars, for the selected criteria: pay location, finance unit finance number, weekly or range of weeks.
- **LDC/Operation Summary Report**
  - **The Operation Summary Report** totals work hours, overtime hours and sick leave hours by Operation or Operation/Local Unit code. These reports are based on operation hours attributed to the finance number you have selected.
  - **The LDC Summary Report** totals work hours, overtime hours and sick leave hours by LDC, LDC/Operation, or LDC/Operation/Local Unit code.
- **Station Summary Report** lists work, overtime and sick leave hours by LDC for carrier stations.
- **Finance Description Report** will display information on finance number(s) selected, including ROG codes, CAG and office type.



- **Flash Reference Report** provides line item data totaling hours by LDC within function.
- **Finance Unit Descriptions Report** provides descriptions of finance units and pay locations.
- **Non-Mail Handler Casual Report** provides, for the Mail Handler's Union, a report of non-mail handler employees who worked in specified mail handler operations.

**LTATS Reports (TAC860R0)**

- **LTATS - Loaned Employee Report** displays those employees 'loaned to' another office. It displays work hours, overtime, and Penalty Overtime.
- **LTATS - Missing CAG A to G Report displays missing LTATS (1236s)** for small offices on timecards.
- **LTATS - Summary Report** displays work and overtime hours that have been transferred to a different LDC/DA or loaned to another office.

**Miscellaneous Site Report (TAC160R0)** provides site descriptions and Finance and IS contacts for that site.

**PPWk Reports (TAC840R0)**

- **Non-Crossfoot Errors Report** lists employees who do not crossfoot for the week. This report is designed to be a tool at the end of the week, and it is recommended that it not be used until you are ready to release T&A data.
- **Pay Week Status Report** provides information regarding time transmitted to Minneapolis.
- **Weekly Form 1261 Report** provides employee clock rings in 1261 format.

- **Weekly Total Hours Report** provides the total amount of hours of each hours code and reason type recorded for the week.
- **Pay Period Report** provides the status of aggregate pay period clock ring data.
- **Pay Week Status Detail Report** provides pay period status for individual employees: on hold, ready to upload, or closed.

#### **Schedule Reports (TAC120R0)**

- **Guarantee Waivers/No Lunch Report** will display authorizations for Guaranteed Time Waivers (Transaction Code 092), and No Lunch (Transaction Code 093).
- **Hours Analysis Report** displays work, overtime, sick leave and annual leave hours for each employee.
- **Hours Type Inquiry Report** lists employees with a specific hours type and/or the hours reason codes.
- **Master Schedule Report** identifies 23 predefined schedules.
- **REHAB/PTR Holidays Report** is designed to list REHAB (LDC 6900) and Part Time Regular employees (designation 3XX) who may be entitled to holiday leave but due to their work schedules the system does not automatically generate the holiday leave. This report is only available during weeks that contain a holiday.
- **Daily Hours Report** lists employees in performance cluster, finance number, sub-unit and employee order. The first line for each employee is the indicative data (Employee Id, Name, RSC, LDC, etc.). The next line will be the hours the employee has worked in his/her base job. Subsequent lines will reflect any hours worked in higher level positions.
- **Schedule Report** lists employees that are in a selected schedule.

**Timecard Entry Report (TAC820R0)**

Time Certification Report consists of "FRONT of TIMECARD" data. The employees are listed in: Performance cluster, Finance number, Sub-unit, and Employee order.

**User Reports (TAC010R0)**

- **The User Access Report** shows users who have access to the system.
- **The User Log Report** shows users who have logged on and off of TACS.

**Valid Codes Report (TAC940R0)**

Valid Codes Report provides a listing of valid national codes.

**ARCHIVE REPORTS**

The following 9 reports will be able to retrieve archive data in TACS. Data that is archived is available for three years before being dropped.

**Employee Reports**

- Employee Everything Report
- Employee Listing Report
- Employee Moves Report

**Finance Reports**

- LDC/Operation Summary Report
- Station Summary

**Schedule Reports**

- Hours Analysis Report
- Daily Hours Report

Clock Ring Reports

- Ring Disallowance Report

Timecard Entry Reports

- Time Certification Report

## Appendix 3 (PW,117)

### Hours Codes/Reason Codes

\* Indicates system-generated rings, not input in the Clock Ring Editor or EBR.

**HOURS CODES** (sometimes referred to as the payroll code)

010 - Begin Tour

011 - Move

012 - Out to Lunch

013 - In from Lunch

014 - End Tour

024 - AWOL

\*030 - Full LWOP Hours (Generated at mainframe)

\*031 - Partial LWOP Hours (Generated at mainframe)

032 - Telephone time

\*033 - Guarantee Telephone time

034 - Beeper Time

\*035 - Extra straight time

\*036 - Guarantee telephone overtime

\*043 - Penalty Overtime Payment (POP)

044 - Military LWOP

046 - Donated Leave - Personal

\*047 - Rural Free Saturday

048 - Holiday Schedule Premium

049 - OWCP LWOP Hours

\*050 - Rural Carrier Trips

\*051 - Rural carrier actual hours

\*052 - Work Hours

\*053 - Overtime Hours

054 - Night Work premium hours

055 - Annual Leave  
056 - Sick Leave  
\*057 - Holiday work  
058 - Holiday Leave  
059 - Part Day LWOP  
060 - Full Day LWOP  
061 - Court Leave  
\*062 - Guarantee time  
\*063 - TE cross-foot (also for code 035)  
065 - Meeting time  
066 - Convention leave  
067 - Military leave  
\*068 - Guarantee overtime  
069 - Blood donor leave  
070 - Stewards duty time  
071 - Continuation of pay leave  
072 - Sunday Premium  
073 - Out of schedule premium  
074 - Christmas work  
\*076 - Non-scheduled cross-foot  
077 - Civil defense leave  
078 - Act of nature leave  
079 - Veterans funeral leave  
080 - Relocation leave  
081 - Civil disorder leave  
082 - Travel within schedule  
083 - Travel outside schedule  
084 - Union official leave  
085 - Voting leave  
086 - Other paid leave  
088 - Non-bargain reschedule premium  
089 - Postmaster Org. leave  
090 - Higher level authorization

091 - Overtime authorization  
092 - Disallow guarantee time  
093 – No lunch punch

## **REASON CODES**

The following are payroll codes with corresponding reason codes:

024 00 AWOL  
024 09 AWOL - Late  
049 00 OWCP - Regular  
049 99 IOD/OWCP - Family Medical Leave  
055 00 Annual leave - Regular  
055 01 Annual leave – In lieu of sick  
055 09 Annual leave – Late  
055 10 Annual leave – Emergency  
055 99 Annual leave - Family Medical Leave  
056 00 Sick leave – Regular  
056 09 Sick leave - Late  
056 11 Sick leave - Restricted  
056 97 Sick leave - Dependent care  
056 98 Sick leave - FMLA Dependent care  
056 99 Sick leave - Family Medical Leave  
059 00 Part Day LWOP  
059 01 Part Day LWOP - in lieu of sick leave  
059 02 Part Day LWOP - Proffered  
059 03 Part Day LWOP - Personal  
059 04 Part Day LWOP - Other  
059 05 Part Day LWOP - Maternity  
059 06 Part Day LWOP - Suspension  
059 07 Part Day LWOP - Union Official  
059 08 Part Day LWOP – Suspending term  
059 09 Part Day LWOP - Late

059 59 Part Day LWOP – System-generated  
059 99 Part Day LWOP - Family Medical leave  
060 00 Full day LWOP  
060 01 Full day LWOP - in lieu of sick leave  
060 02 Full day LWOP - Proffered  
060 03 Full day LWOP - Personal  
060 04 Full day LWOP - Other  
060 05 Full day LWOP - Maternity  
060 06 Full day LWOP - Suspension  
060 07 Full day LWOP - Union official  
060 08 Full day LWOP - Suspending term  
060 09 Full day LWOP - Late  
060 99 Full day LWOP - Family Medical Leave  
071 00 COP - Regular  
071 99 COP - Family Medical Leave  
091 00 Overtime Authorization  
091 01 OT Auth - Before Scheduled Tour  
091 02 OT Auth - After Scheduled Tour  
091 03 OT Auth - Full Tour  
091 04 OT Auth - Before Scheduled Tour – Out of Schedule  
091 05 OT Auth - After Scheduled Tour – Out of Schedule  
091 06 OT Auth - Full Tour – Out of Schedule



## Appendix 4 (PW,121)

### EXTERNAL TRANSFER – DSIS

#### Background....

The TACS system is an Oracle based system. The Employee file that is resident on the database is not in the correct format for DSIS Host Utilities. In order to make it compatible a conversion program must be executed after the employee file and ring file is extracted from TACS. This conversion program, along with a Batch job called DSIS.BAT, will be installed on several workstations (local drive) in the Data Site. By so doing, several of the data techs will have the capability to extract the rings and the employee file from TACS and load these files into the DSIS Host Utilities PC.

#### Installing....

The DSIS.bat file must be edited to change the 3-digit database number to reflect the database being used. You will receive this file and Empcvnt.exe from Minneapolis with instructions. On the root of C create a folder called DSIS (or from a DOS prompt (C:\) type MD DSIS <ENTER>). Copy the EMPCVNT.EXE file into this folder/directory. Copy the DSIS.bat file to the root directory (C).

#### Instructions for Transferring to DSIS....

- Choose Externals; External Transfers from the drop down menu on the Home Page. The first Tab will be DSIS.
- All Unsent Rings will be highlighted; leave as is.
- Click on Single Finance Number and either key in the finance number needed or press <F9> for a list and select the finance number.
- Click on the 'RUN DSIS' button. TACS will retrieve the rings and the employee file.

- A window appears with the heading 'Save As...'. The file name will be DSISRAW\_XXX\_DAT.exe (where XXX is the database number)
- Choose the DSIS folder on the 'C' drive and click on Save.  
Note: After the first time these procedures are followed the system will ask if you want to over-write the existing files – click on Yes.
- Another file appears EMPLOYEE.XXX\_TXT.exe. Click Save again.
- Click on Start on the bottom left of the screen. Then click on RUN.
- Insert a diskette in Drive A.
- Type C:\DSIS and click OK or press <Enter>. The 2 files will be copied to the diskette. Load the files from the diskette into SIS host utilities.

## **TACS – Daily Procedures**

**Daily Process** - The daily process should consist of the following items:

- ◆ Correcting all outstanding errors, guaranteed time and unauthorized overtime. Users should enter TACS at least three times throughout the day in order to manage their employee's time daily.
- ◆ Entering daily overtime, higher level, leave authorizations and change of schedule requests
- ◆ Monitoring employee's time
- ◆ Take corrective action as necessary

### **Correcting All Outstanding Errors and Missing Time**

**Run and Print the Following Reports.** The first three reports (A, B & C) are within the same clock ring reports module.

- Clock Ring Error report (Reports, Clock Ring Reports, Clk RngErr tab)
- Unauthorized Overtime report (Reports, Clock Ring Reports, Unauth OT tab)
- Missing Time report (Reports, Clock Ring Reports, Miss Time tab)
- Hours Type Inquiry report (Reports, Schedule Reports, Hrs Type Inq)

**Clock Ring Error Report** - Correct all clock ring errors via the Clock Ring editor (Time, Clock Ring Editor).

- Add/Delete all obvious errors
- Enter all missing time via Form 1260's/1261's not entered from previous day
- Enter all missing leave via Form 3971 not entered from previous day
- Verify each correction as it is made via the pre-process option and save the transaction if corrected properly
- Rerun the Clock Ring Error Report for verification via Reports, Reports Queue

**Unauthorized Overtime Report** - Authorize all overtime that was not authorized for the previous day via the Clock Ring editor (Time, Clock Ring Editor). These authorizations should be taken from the overtime call report generated out of the general clerk's office.

- Add Code 091, *Overtime Authorization*, for each authorized instance
- Post the remaining unauthorized overtime to Form 1017B

**Missing Time Report** - Enter all missing time for the employee's who did not appear on the clock ring error report (Time, Clock Ring Editor).

- Add 1260's/1261's
- Add 3971's

**Hours Type Inquiry Report (Guaranteed Time (GT) Report)** - Disallow all unauthorized guaranteed time via the clock ring editor (Time, Clock Ring Editor).

- Add Code 092, *Disallow Guarantee Time*, for each unauthorized instance for which a Form 3971 has been received and is valid
- Post the remaining unauthorized overtime to Form 1017A

**Enter current day authorizations via the clock ring editor (Time, Clock Ring Editor).**

- Enter all current day leave from Form 3971
- Enter all current day overtime authorizations from the overtime call report
- Enter all higher level authorizations from Form 1723
- Enter all change of schedule requests from Form 3189 (Employee, Employee Maintenance, Daily Schedule tab). It is important to select the correct week when changing daily schedules. When two weeks are open, TACS defaults to the second week.

**Employees on the Clock Report (Reports, Employee Reports, Emp O tab)** - Review report to ensure employee's are in the proper operation and take corrective action as necessary.

**Reports - Monitoring Employee's Time** – Several reports within the TACS system provide management with some very useful tools for monitoring employee's time. Some of these reports are outlined below with their respective explanation.

1. **Clock Ring Error Report** (Reports, Clock Ring Reports, Clock RngErr tab) – Details the employee's who are in a clock ring error status. The employee's that appear on this report will receive LWOP if the error is not resolved prior to the cutoff time.
2. **Unauthorized Overtime Report** - (Reports, Clock Ring Reports, Unauth OT tab) – Details the employees who have unauthorized overtime. Employee's that remain on this report must have their time posted to Form 1017B.
3. **Missing Time Report** (Reports, Clock Ring Reports, Miss Time tab) - Details the employee's who are missing time and may or may not have appeared on the clock ring error report.
4. **Hours Type Inquiry Report** (Reports, Schedule Reports, Hrs Type Inq) – Allows the user to generate a report based on selective pay codes (i.e. 055-A/L, 056-S/L etc.) This report is mostly used to show employee's who are receiving Guaranteed Time.
5. **Employee's Not In Crossfoot** (Reports, PPWK Reports, Non-Crossfoot Err) – Details the employee's whose time does not crossfoot to 40 hours for the week.
6. **Pay Week Status Total** (Reports, PPWK Reports, Pay Week Status Total) – Details the number of employee's released to the mainframe for the selected week and finance number. This report also lists the number of employee's that the mainframe expects to receive time for.
7. **Tour Deviation Report** (Reports, Clock Ring Reports, Tour Dev tab) – Details employee's who have deviated from their scheduled begin/end tour or lunch schedule. This report can be generated up to .001 of time.
8. **Employees on the Clock Report** (Reports, Employee Reports, Emp O tab) – Details the employee's on the clock for a selected operation and date/time.
9. **Overtime Alert Report** (Reports, Clock Ring Reports, OT Alrt tab) – Details employee's who may be approaching penalty overtime. This report should be run as early as Tuesday for those employees within plant operations.
10. **Employee All Report** (Reports, Employee Reports, Emp All tab) – details all of an employee's transactions for the selected year, pay period and week.
11. **LDC/Operation Report** (Reports, Finance Reports, LDC/Oper Sum tab) – Allows the user to generate an operations report based on a selected LDC/Operation Number/LU.
12. **Raw Ring Error Report** (Reports, Clock Ring Reports, Raw RngErr tab) – Allows the User to determine, by a selected error code, which employee's have duplicate badges which may or may not be working. The recommended error codes are 098 and 106 and it is highly recommended that supervisor's do not select "All error Codes." Supervisor should run this by individual employee. It is important to note that once the timecard has been replaced, the error remains on this report for four weeks. Subsequent reports should be run for a specific date.
13. **Employee Listing** (Reports, Employee Reports, Emp List) – Details all employee's for the selected finance number and pay location, including the employee's base schedule, D/A, LDC, N/S days, lunch times and base operation numbers. It is recommended that this report be generated after each posting result to ensure accuracy of the pay location.
14. **Limited Duty Rehab** (Reports, Employee Reports, LTD DTY) – Details all employee's who are on limited duty or rehabilitation. This report should be generated each week that includes a holiday as these employee's must have their Holiday manually entered. TACS does not automatically enter Holiday premium for these employee's or PTR employee's.
15. **Station Summary** (Reports, Finance, Station Sum) – Details a station summary also known as Form 3630.
16. **Hours Analysis** (Reports, Schedule Reports, Hrs Anly) – Details annual leave, sick leave, hours worked and overtime for the employee's and finance number selected.
17. **Time Certification** (Reports, Time Card Entry Reports, Time Certification) – Details the employee's indicative data and then their base hours and higher level hours transacted for the selected week.