



SUPPLEMENTS MANAGEMENT PROGRAM v2.2

User Guide

Table of contents

Supplement Functions	
Supplement	1 - 6
My Entered Supplements	6 - 7
Approval Functions	
Supplements Pending My Approval	7 - 8
Other Options	
Change my Password	8
Change my Page Size Preference	8
Account Inquiry	8 - 9
Search Employee ID	9

SUPPLEMENT

The Supplement screen is the most important page of SMP, it is here where employees who will be receiving a supplement are entered.

The screen looks like the following

To initiate a supplement, two things are required:

1. The type of payroll frequency (Biweekly, or Monthly)
2. After the frequency is selected, the “Purpose” of the supplement should be entered.

When this is done, Click on the “NEW” button, this will bring up the Data Entry screen

To key in an employee, type in the numerical part of the Employee ID, SMP will auto fill leading zeroes.

If you don't have the employee id, click on the  icon to bring up the Employee Search Screen.

Employee ID Search by Name

Last: First: M:

LAST	FIRST	MIDDLE	FREQ	EMPID	SELECT
CAMPBELL	JOHN	T	6	000000018	
BROWN	JO	A	6	000000016	
GOLDBERG	JOSSEF	H	6	000000011	
DOBNEY	JOLYNN	M	6	000000007	
EVANS	JOHN	P	4	000000083	

of records found: 5

The Employee Search Screen uses a phonetic search algorithm. Partial or full names can be typed into any of the First, Middle, and Last name textboxes and any relevant records will be retrieved. In the above example, keying in JO would bring up the five records shown. Typing in JOHN would bring up only two records.

Employee ID Search by Name

Last: First: M:

LAST	FIRST	MIDDLE	FREQ	EMPID	SELECT
CAMPBELL	JOHN	T	6	000000018	
EVANS	JOHN	P	4	000000083	

of records found: 2

**** NOTE: Your results may vary depending on your District employees ****

To select an employee, click on the icon for the desired row, this will place the employee ID on the data entry screen as shown below

NEW SUPPLEMENT RECORD

Employee ID:

Category:

Sub Category:

Employee Name:

Hrs/Units:

Rate:

Amount Due:

Budget Account:

Next, select a Category for the supplement. This will allow SMP to get the Sub Categories for your selection, if there are no categories for the selection, SMP will issue an error.

Next select a Sub Category, this will allow the system to look up the Employee Name associated with the Employee ID.

NEW SUPPLEMENT RECORD	
Employee ID	000000018 
Category	After School Tutorials
Sub Category	Instructional Aide/Office Clerk Sub Category
Employee Name	CAMPBELL JOHN T
Hrs/Units	
Rate	10.00
Amount Due	
Budget Account	
<input type="button" value="ADD"/> <input type="button" value="CLOSE"/>	

Depending on the Category / Sub Category combination selected, Hrs/Units may or may not be editable. For example, if your Payroll Department had a Sub Category which pays a flat amount, SMP would place 1.00 in the Hrs/Units textbox.

Using this example, type in the number of hours to be paid to the selected employee on the Hrs/Units textbox.

This will auto calculate the Hrs/Units x Rate of Pay for the selected Category / Sub Category combination as shown:

NEW SUPPLEMENT RECORD	
Employee ID	000000018 
Category	After School Tutorials
Sub Category	Instructional Aide/Office Clerk Sub Category
Employee Name	CAMPBELL JOHN T
Hrs/Units	2.75
Rate	10.00
Amount Due	27.50
Budget Account	
<input type="button" value="ADD"/> <input type="button" value="CLOSE"/>	

The last step before clicking the "ADD" button is to key a valid 20 digit Budget Account code that will be paying for the supplement. SMP will check for valid accounts using your District's Financial System.

There is no separation between the account components; this means that rather than typing 199 11 6112 01 113 2 11 000 you would have to type 19911611201113211000.

Q. Why would you have to type in the account in this manner?

A. This allows the use of copy / paste when keying in many supplement items.

When done, click on the "ADD" button.

If the record passes the system checks, it will be added in the background, and the data entry section will be cleared.

SUPPLEMENT Back to Main

SID# 13 S - Saved

Local Print Attachments Approval Path Notes Delete Update Purpose

Biweekly Monthly Pay Date: 5/25/2012 Purpose AFTER SCHOOL TUTORIALS FOR APRIL

NEW SUPPLEMENT RECORD

Employee ID

Category

Sub Category

Employee Name

Hrs/Units

Rate

Amount Due

Budget Account

ADD CLOSE

Edit Delete

Q. Why not just show the grid instead of showing the data entry screen?

A. This allows for faster data entry where you can add one employee after another without the need to click on "Add" on the supplement screen.

When done adding employees, click on the "CLOSE" button.

The supplement will look similar to

SUPPLEMENT Back to Main

SID# 13 S - Saved

Local Print Attachments Approval Path Notes Delete Update Purpose

Biweekly Monthly Pay Date: 5/25/2012 Purpose AFTER SCHOOL TUTORIALS FOR APRIL

EMPID	Employee's Name	Hrs/U	Rate	Due	Account	CAT	S-CAT	SC	Edit	Delete
000000018	CAMPBELL JOHN T	2.75	10.00	27.50	19911611201113211000	After School Tutorials	Instructional Aide/Office Clerk	76		

Page: 1 of 1

<< >>

Note that there are many more options than before.

The "Local Print" button is enabled (*this allows you to print your supplement*)

The "Attachments" button is enabled (*this allows you to add supporting documentation for your supplement*)

The "Notes" button is enabled (*this allows you to see the supplement notes*)

The "Delete" button is enabled (*as its name implies, this allows you to delete the supplement*)

The "Update Purpose" button is enabled (*this allows you to update only the Purpose textbox*)

The "Submit" button is enabled (*this allows you to submit the supplement*)

Attachments are required to submit a supplement.

To add an attachment to the supplement, click on the “Attachments” button, the following will show up

Find your file by clicking on the “Browse” button. When you have selected your file, click on the “Upload” button. If your file is successfully uploaded, it will show up under the “Uploaded Files” section as shown below:

File Name	Date	Size	Delete
Sample file.pdf	04/21/2012	385 KB	X

The only file types allowed by SMP are PDF. They must be no larger than 3MB in size. If you have an attachment larger than 3MB, it is recommended that it's scanned and uploaded in two parts. Moreover, it is recommended that if documents are scanned, they are scanned in 300 dpi (dots per inch) resolutions. Please contact your IT department for help in how to meet the scan requirement.

If you are ready to submit, click on the “Submit” button. If your supplement is past the Payroll Department deadlines, the following prompt will show up:

When this happens, click on the “Submit to the Next Available Pay date”, this will change the supplement pay date to the next available pay date.

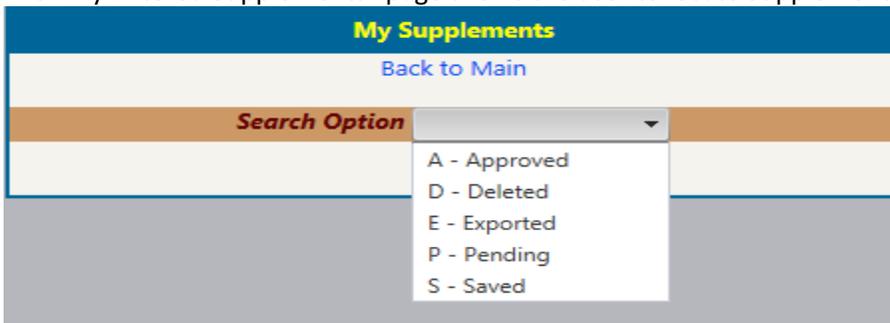
If the user submitting the supplement does not have multiple approval paths for the same fund, SMP will submit the supplement for approval; however, if the user has multiple approval paths, SMP will show the following

Select the appropriate Approval Path by clicking on the desired radio button, this will submit the supplement.

This will submit the supplement.

MY ENTERED SUPPLEMENTS

The “My Entered Supplements” page allows the user to locate Supplement requests.



To find a specific type of supplement, click on the drop down option and any relevant results will be shown.



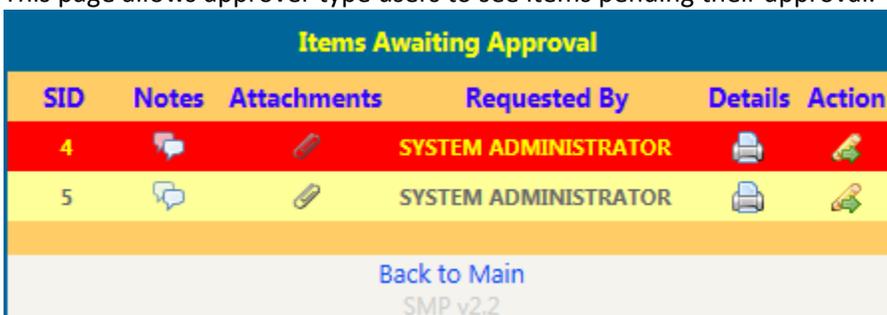
The following icons are present:

- Shows the comments for the supplement
- Shows the approval path for the supplement
- Shows the Attachments for the supplement
- Shows the printout for the supplement

Clicking on the icon will bring up the relevant page.

SUPPLEMENTS PENDING MY APPROVAL

This page allows approver type users to see items pending their approval.



The icons perform the same functionality described on page 19

Supplements highlighted in red have been moved by SMP into the next Pay Date.
 Supplements not highlighted in red are en-route to being paid into the current pay date.

To Approve / Deny a supplement, click on the  icon, this will bring up the approval screen as shown below:

#	Approver Name	Date	Time	Status	Action
1	SYSTEM ADMINISTRATOR			P - Pending	Save
2				A - Approve	Save
3				D - Deny	Save
4				P - Pending	Save
5					Save
6					Save
7					Save

The options for a supplement are as follows:

- A – Approve** Approves the supplement and forwards to the next approver if any. If there are no more approvers, selecting 'A – Approve' then "Save" will finalize the supplement and place it on the "Exports" Section (covered later)
- D – Deny** Allows Approver to send back a supplement for corrections, upon selection, it will show a textbox where 'Denial Comments' can be entered. These comments will be shown in the body of the email to the originator and they will also be saved into the Supplement's history notes.
- P – Pending** Default action for a supplement, it does not enable the "Save" button.

Upon an "Approver" or "Deny" action, SMP will reload the page so that the approvals grid can be reloaded.

If there are no supplements pending an approval, SMP will show an appropriate message.

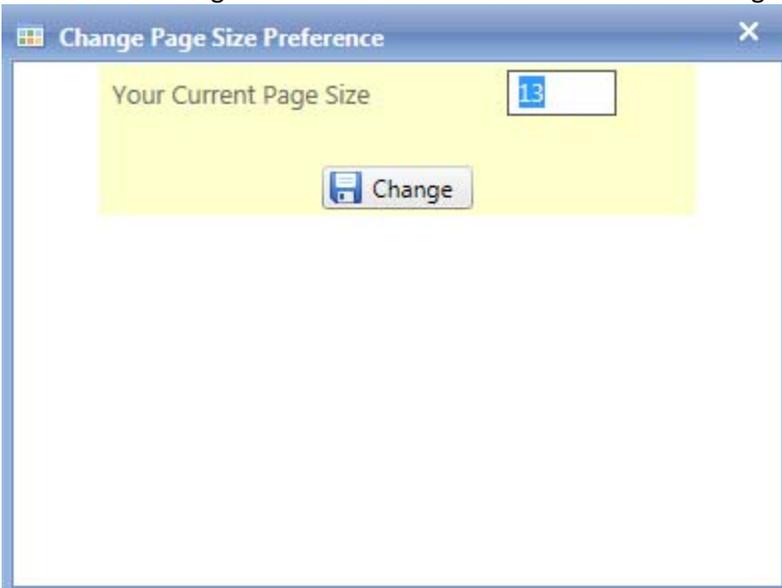
CHANGE PASSWORD

This menu option allows users to change their original password '1234' into something more to their requirements.

CHANGE PAGE SIZE PREFERENCE

This menu option controls depending on your user’s page size, the number of records shown on a user’s monitor. The bigger the monitor, the more “read estate” a user may have to display more records.

The default setting for all users is 13. This can be modified using this menu option



There is no need to logoff to make this change take place.

ACCOUNT INQUIRY

The “Account Inquiry” screen allows users to query the system for account used in supplements

Supplements Budget Account Inquiry

FND	FNC	OBJ	SOBJ	ORG	Y	PR	ED	PRJ
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Run Query							Clear	
Back to Main								
SMP v2.2								

To search for accounts, type in a mask where wild cards are left blank. Depending on a mask, relevant results will be shown

Supplements Budget Account Inquiry

FND	FNC	OBJ	SOBJ	ORG	Y	PR	ED	PRJ
<input type="text" value="199"/>	<input type="text" value=" "/>	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Run Query							Clear	
Available Pay Dates <input type="text" value="[Select One]"/>								
SID	EmpID	Employee Name	Category - SubCategory	Org	Units	Rate	Due	PDT
5	00029	*KEIL KENDALL C	After School Tutorials - Intructional Aide @ 10.00	001	12.00	10.00	120.00	05/04/2012
4	00035	*KUPPA VAMSI N	After School Tutorials - Intructional Aide @ 10.00	001	12.00	10.00	120.00	04/25/2012
3	00028	*SHARMA ASHVINI R	After School Tutorials - Teacher / Librarian	001	10.00	20.00	200.00	05/25/2012
# of Records in Query: 3 * Currently In Process				Totals:	34.00		440.00	
Back to Main								
SMP v2.2								

