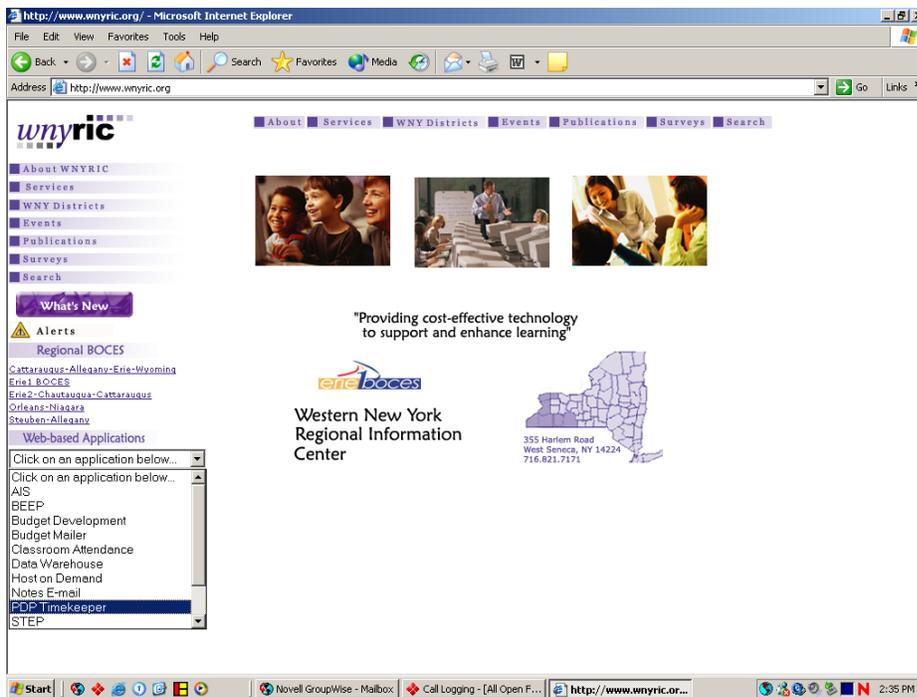


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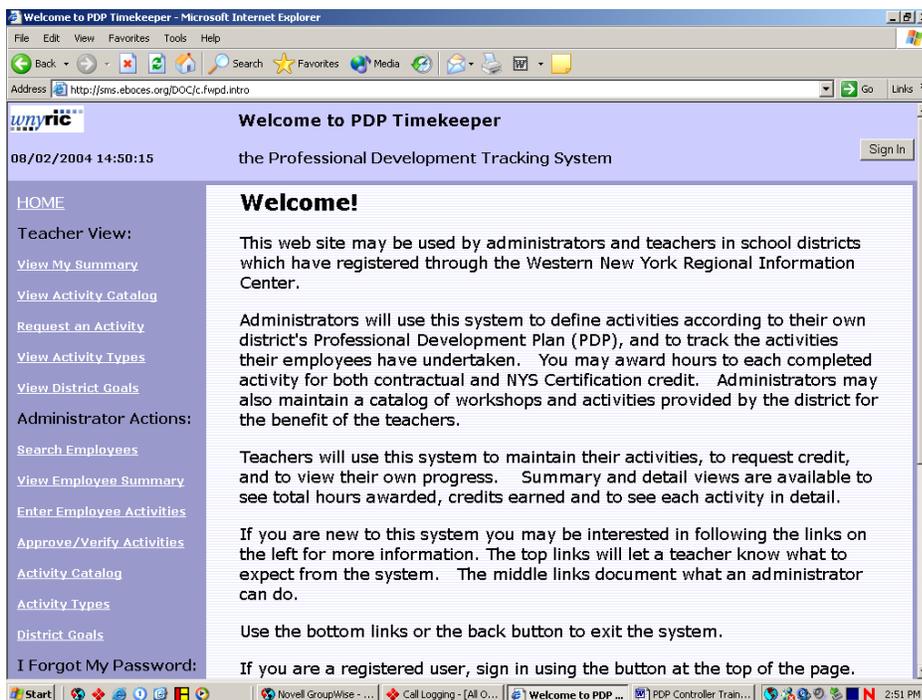
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## Logging Into PDP Timekeeper

1. You can access the website by either clicking on the link on your district website or typing <http://www.wnyric.org> in the address box of your browser and clicking GO.
2. On the bottom left hand side of the screen click the drop down for Web Based Applications and select PDP Timekeeper.

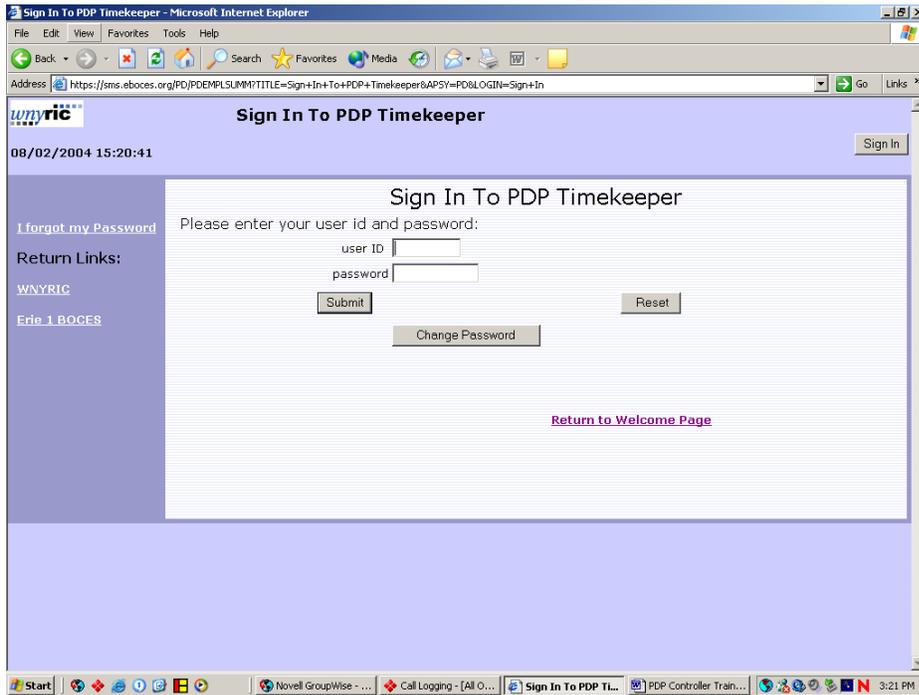


3. When the log in screen appears click on the Sign In button in the upper right corner of the screen.



4. On the login screen fill in User ID and password, then click on the Submit Button.

Note: If this is the first time you are logging in the password will be your first and last initial plus the last 6 numbers of your SSN.



Once Login is completed the approve/verify screen will come up for controllers and administrators. The Summary screen will come up for employees/teachers.

# Searching Activities

The Search Activities option is where the user can create a variety of reports for tracking activities requested by employees. By using the selection criteria in the search activities button the user can create the following reports.

**Class Roster** – Select by activity

**Activity Listing by Current Status** – Select by status

**Employee Activity by Date Listing** – Select by date

**Employee Activity by Activity Type Listing** – Select by Activity Type.

**Employee Activities by District Goals Listing** – Select by District goals

**Employee Activities by Building Listing** – Select by Building

**Employee Activities by Funding Source Listing** – Select by Funding Source

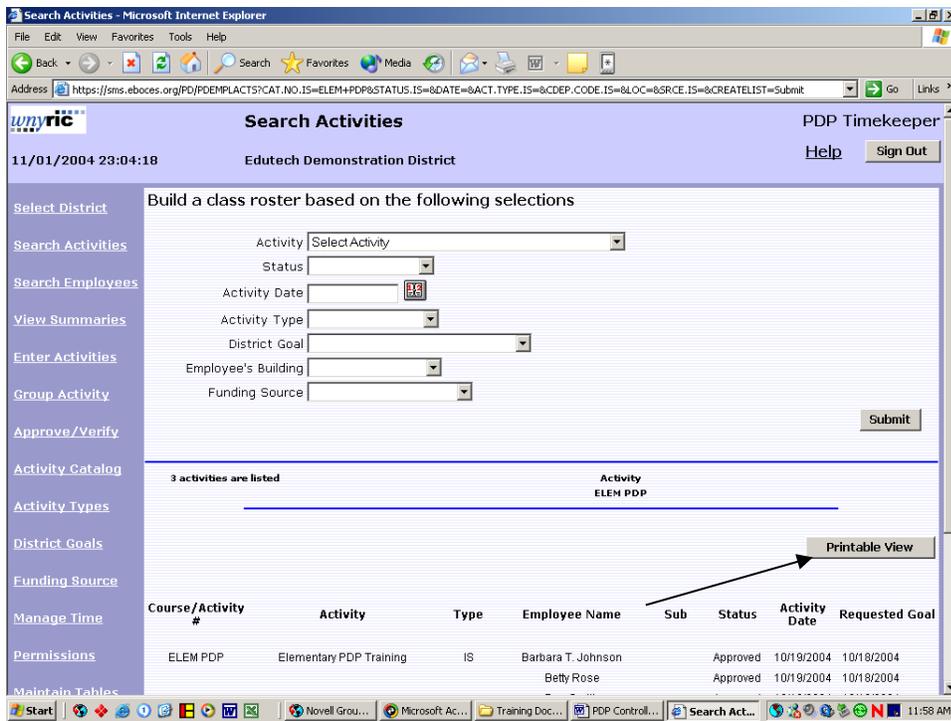
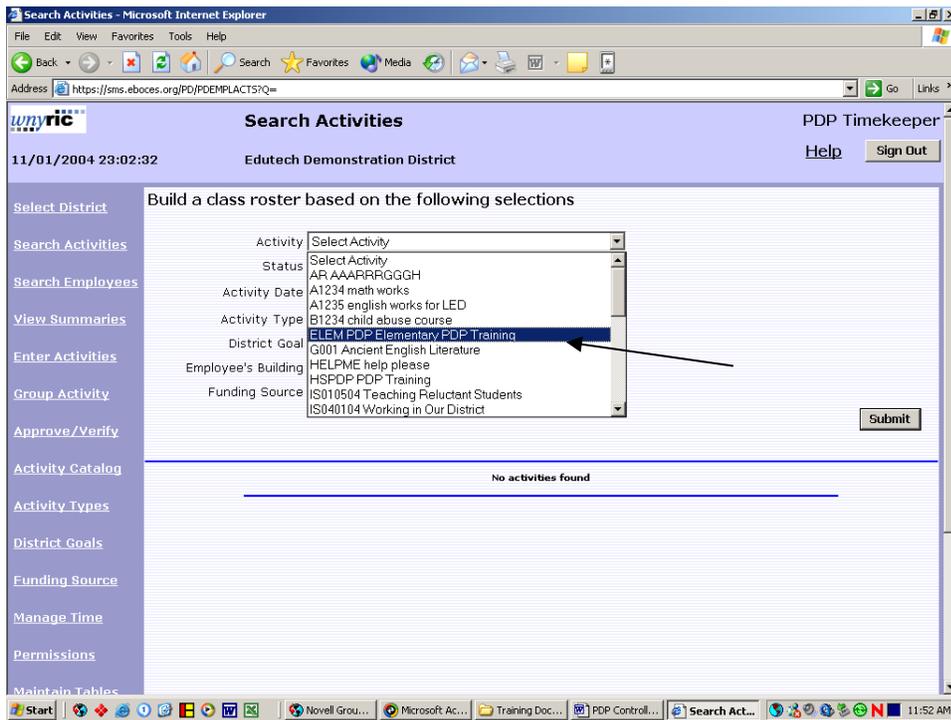
**Note:** To create variations of the reports listed above select multiple criteria, for example using both the date and building a report of employee activities by date within a building can be created.

1. From any screen in PDP click on the Search Activities Button.

The screenshot shows the 'Approve/Verify' web application interface. The top navigation bar includes 'Search Activities', 'Search Employees', 'View Summaries', 'Enter Activities', 'Group Activity', 'Approve/Verify', 'Activity Catalog', 'Activity Types', 'District Goals', 'Funding Source', 'Manage Time', 'Permissions', and 'Maintain Tables'. The main content area displays a list of activities with columns for 'P', 'A', 'V', 'Name', 'Title', 'Catalog No', 'Sub', 'Activity Date', and 'Requested'. The list is sorted by 'Catalog Number'.

P	A	V	Name	Title	Catalog No	Sub	Activity Date	Requested
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	School Admin			06/03/2004	06/03/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	* Teaching Reluctant Studen	IS010504		01/05/2004	02/25/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	Thomas Anderson	Working in Our District	IS040104		04/01/2004	02/05/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	David S. Conley	Methods for Teaching Chal	IS121203		12/12/2003	12/02/2003
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	Methods for Teaching Chal	IS121203		12/12/2003	12/03/2003
<input type="checkbox"/>	Y	<input type="checkbox"/>	David S. Conley	Mentor Orientation	MN001		01/05/2004	05/10/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	TEACHER X, GUEST	Mentor Orientation	MN001		01/05/2004	05/10/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	TEACHER X, GUEST	Mentor Orientation	MN001		01/05/2004	07/21/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	library	MN002		01/05/2004	06/23/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	* Mentor Observation	MN002		01/05/2004	05/26/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	TEACHER X, GUEST	Visit w/ Dr Phil	OTH050304		05/03/2004	05/03/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	David S. Conley	Visit w/ Dr Phil	OTH050304		05/03/2004	04/30/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	Visit w/ Dr Phil	OTH050304		05/03/2004	05/20/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	* Visit w/ Dr Phil	OTH050304		05/03/2004	05/25/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	Visit w/ Dr Phil	OTH050304		05/03/2004	07/26/2004
<input type="checkbox"/>	N	<input type="checkbox"/>	TEACHER X, GUEST	Visit w/ Dr Phil	OTH050304		05/03/2004	07/27/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	Joann X. Smyth	Follow Up With Phil	P404		07/12/2004	07/16/2004
<input type="checkbox"/>	Y	<input type="checkbox"/>	Arthur P. Wilson	Follow Up With Phil	P404		07/12/2004	07/16/2004

2. Use drop down menus to fill in the selection criteria at the top of the screen to create the desired report.

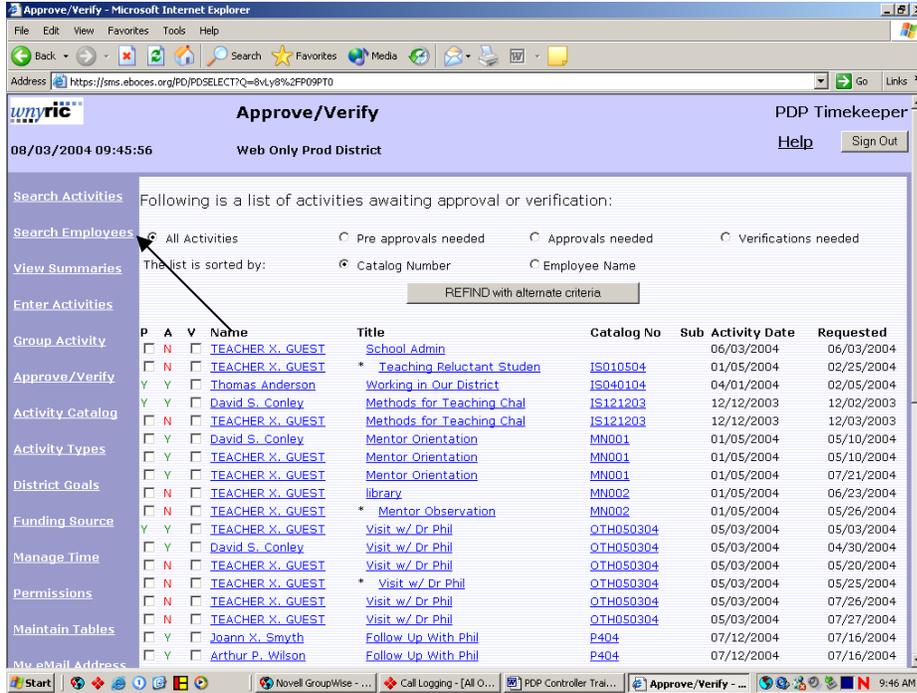


3. To print a report version of the screen click on the Printable View button.

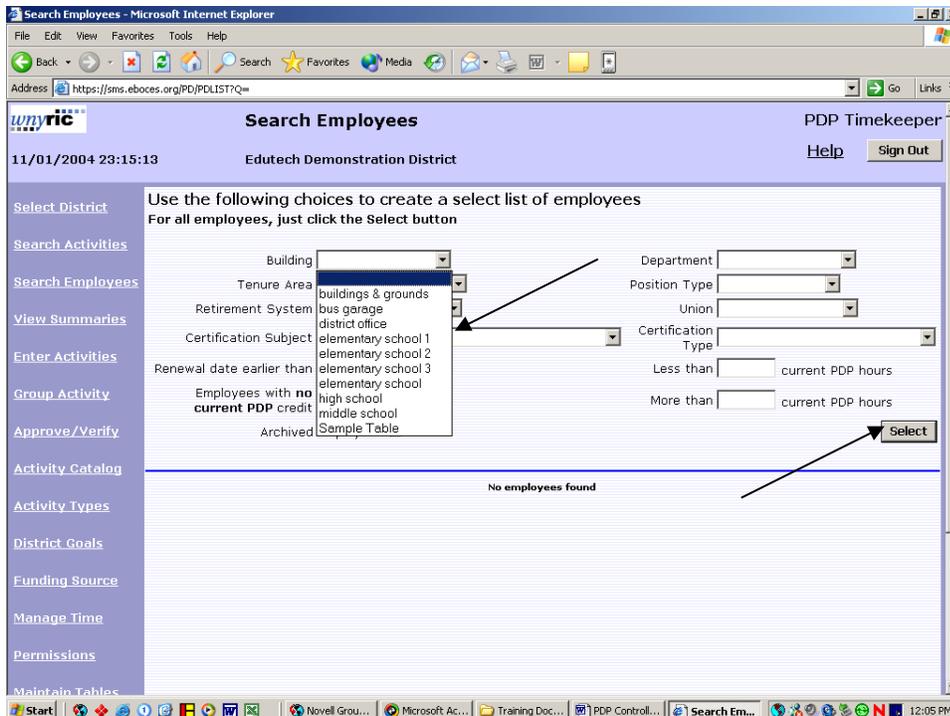
## Search Employees

The Search Employees option allows administrators and controllers to view employee summaries and update data for individual employees. Reports can be created by using the search criteria. For example: a list of employees assigned to a specific building can be created by selecting the building and clicking the printable view button.

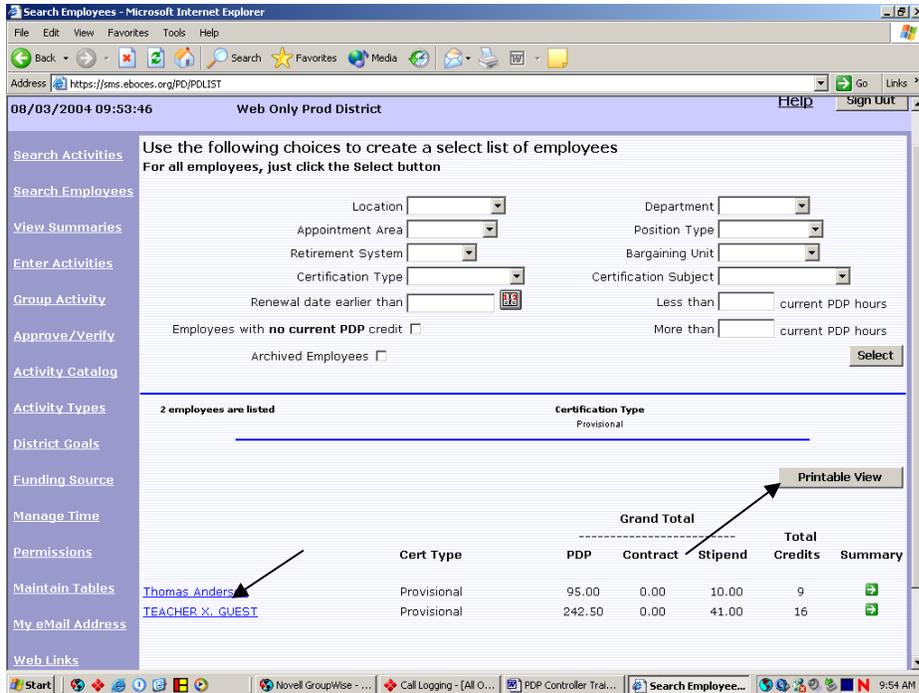
1. From any screen in PDP click on the Search Employees button.



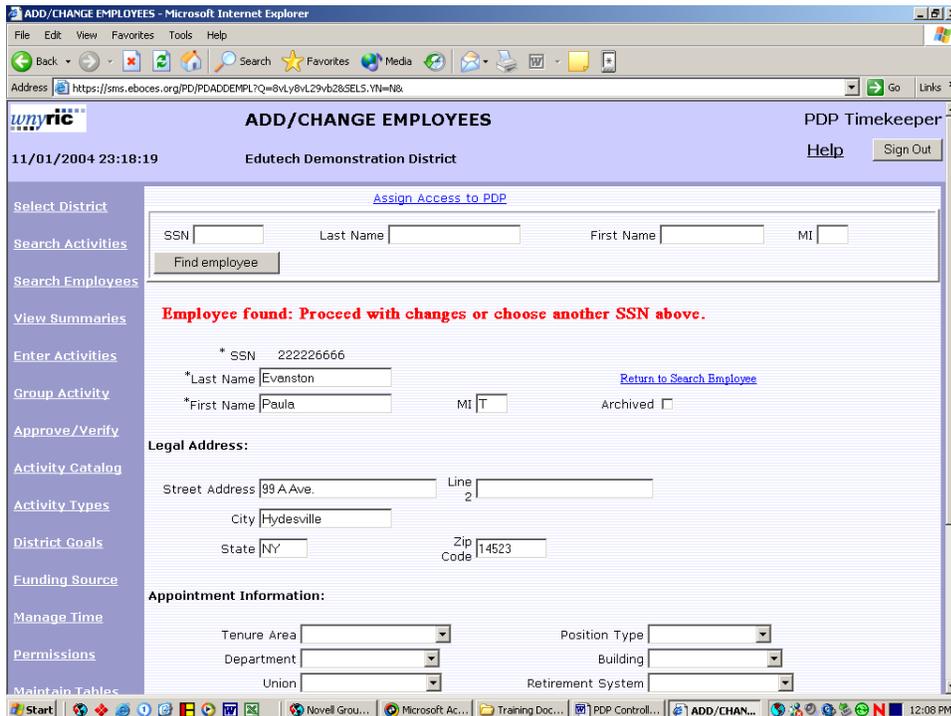
2. Fill in any search criteria to search for a specific group of employees or leave criteria blank to view all employees. Click the Select button.



- To view summary data for an employee click the Summary button on the right hand side of the screen.



- To update employee information Click on the employee's name.

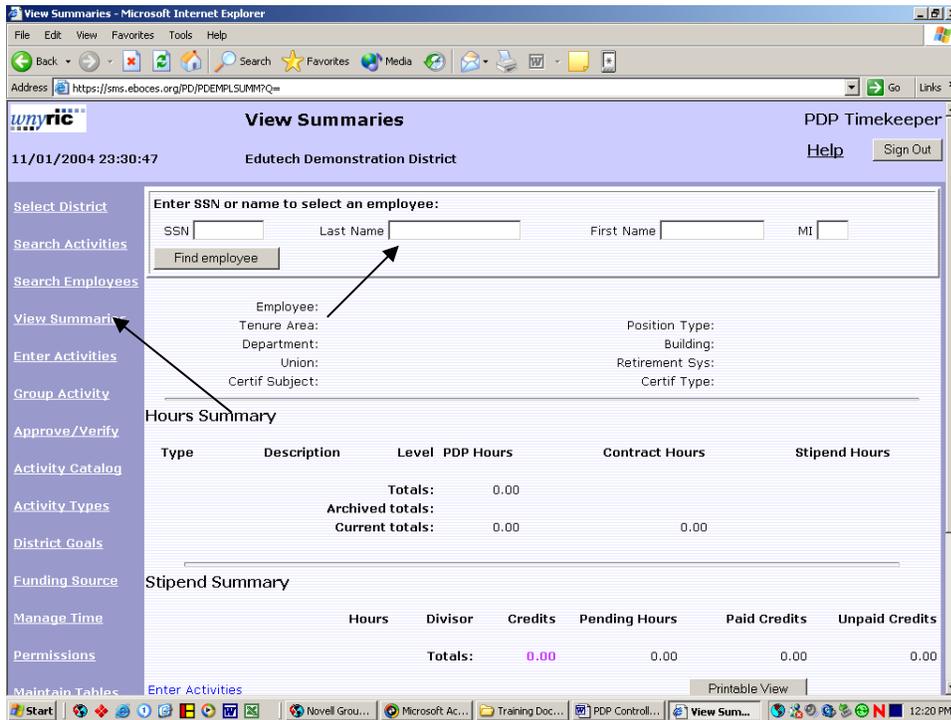


- Make necessary changes and click the update employee button at the bottom of the screen.

## View Summaries

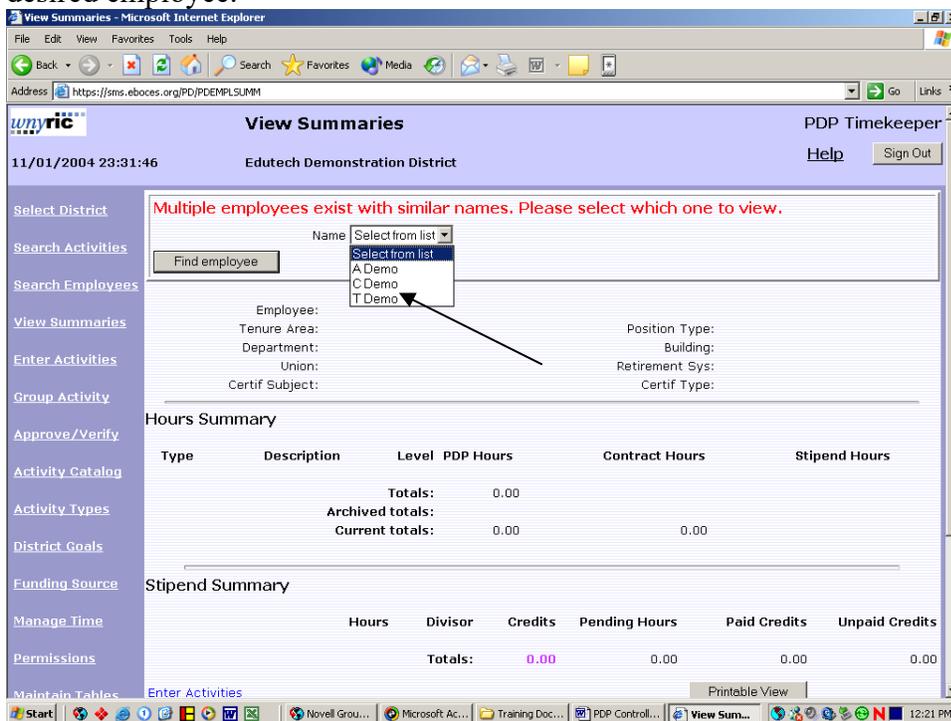
View Summaries is another way for administrators and controllers to access summaries for individual employees.

1. From any screen in PDP click on the View Summaries button.



2. Fill in Last Name and click the Find Employee button or leave SSN blank and click Find Employee button to search from a list of employees.

**Note:** If there is more than one employee with the same last name use the drop down list to select the desired employee.



## Enter Activities

A Controller or an Administrator can submit an activity for an employee to attend by using the Enter Activity Function.

**Note:** Administrators and controllers use this function to enter activities for themselves..

1. From any screen in PDP click the Enter Activities button.
2. Enter the employee's last name or leave blank to select from a list of employees and click the Find Employee button.

**Note:** If there is more than one employee with the same last name use the drop down list to select the desired employee.

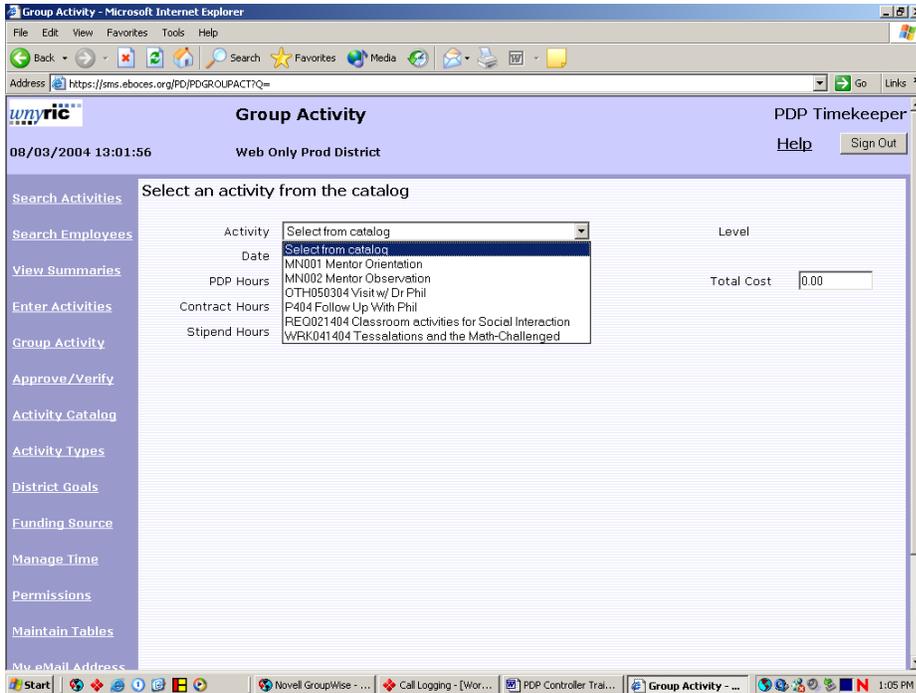
3. Either select activity from the Activity Catalogue or manually enter activity if not in the catalogue. **Note:** Fields marked with an asterisk are required. Then click the Submit button to enter the activity.

The screenshot shows the 'Enter Activities' web application. The browser window title is 'Enter Activities - Microsoft Internet Explorer'. The address bar shows a URL starting with 'https://ms.ebores.org/PD/PDENTRY?ACT.TYPE.CODE=IS&K=9Fjw6Q=8fLz9YI29%2Fj5'. The page has a blue sidebar on the left with navigation links: Search Employees, View Summaries, Enter Activities, Group Activity, Approve/Verify, Activity Catalog, Activity Types, District Goals, Funding Source, Manage Time, Permissions, Maintain Tables, My eMail Address, Web Links, and WNYRIC. The main content area shows employee information for 'TEACHER X. GUEST' with area '7-12 teacher', union 'Teacher ass'n.', and cert subject 'Math 7-9 Exten'. Below this is a form titled 'Enter or change information in the following form.' with a note '\* indicates required fields'. The form contains several fields: 'Type of Activity' (dropdown menu set to 'In Service'), 'District Catalog #' (text box with 'A1234'), '\* Title' (text box with 'math works'), 'Justification' (dropdown menu), '\* Date' (calendar icon set to '08/14/2002'), 'Goal' (dropdown menu set to 'improve math'), 'Contract Hours' (text box with '0.00'), 'Total Cost' (text box with '0.00'), 'PDP Hours' (text box with '3'), 'Funding Source' (dropdown menu), 'Stipend Hours' (text box with '3'), and 'Substitute Needed' (checkbox). At the bottom of the form are buttons for 'Submit Activity', 'Clear the Form', 'Delete Activity', and 'Reset'. Below the form is a 'View Summary' link and a note 'Use this link to escape updating'. At the very bottom, there is an 'Approvals:' section.

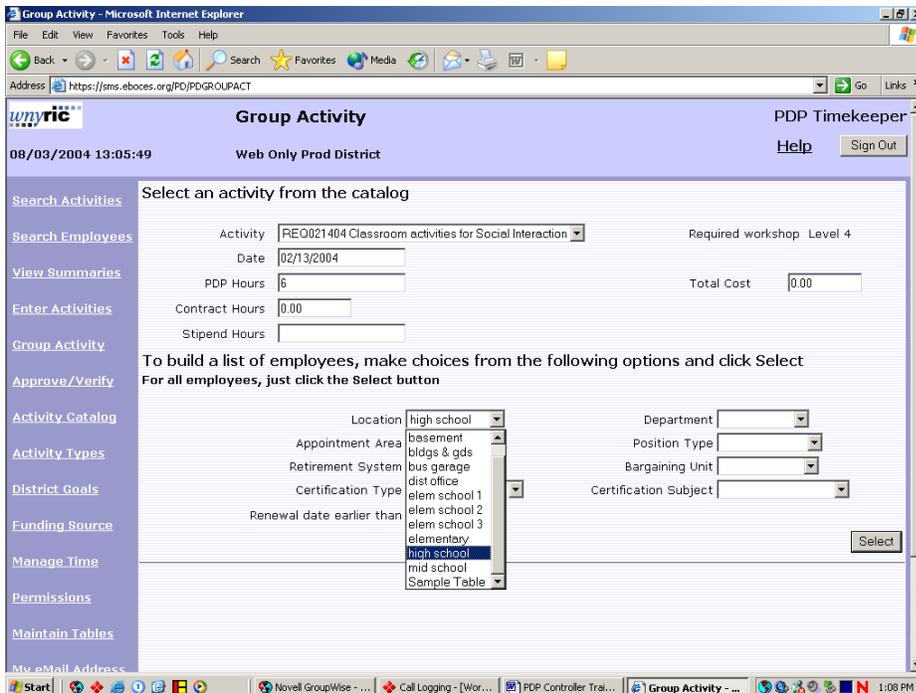
## Group Activity

Group Activity gives controllers and administrators the option to add an activity request to a selected group of employees.

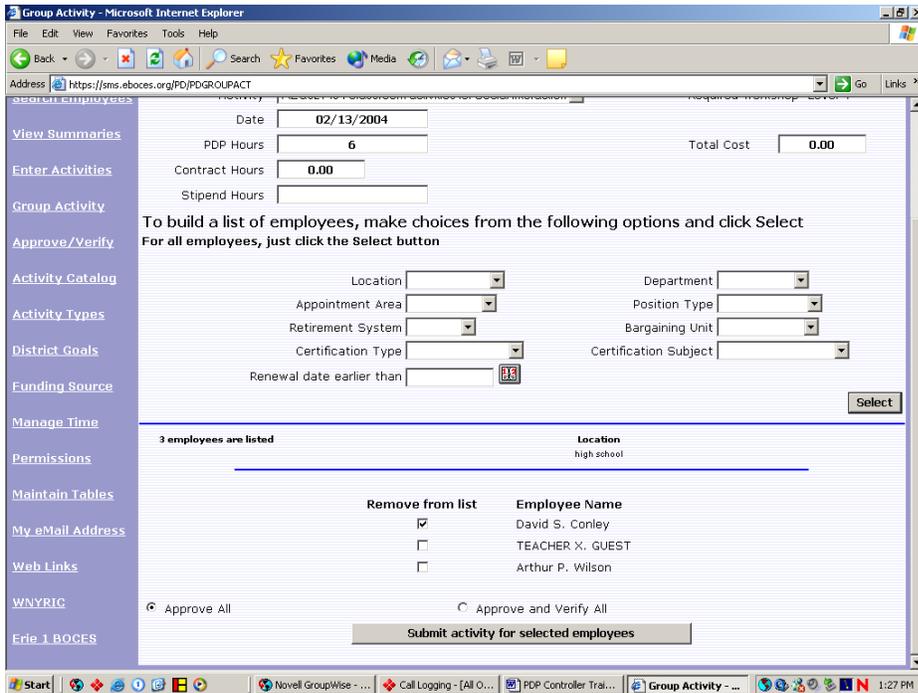
1. From any screen in PDP click on the Group Activity button.
2. From the Group Activity Screen select an activity from the Activity Catalog.



3. Then using the criteria choices available select the desired group or leave blank to bring in all employees and click on the Select button.



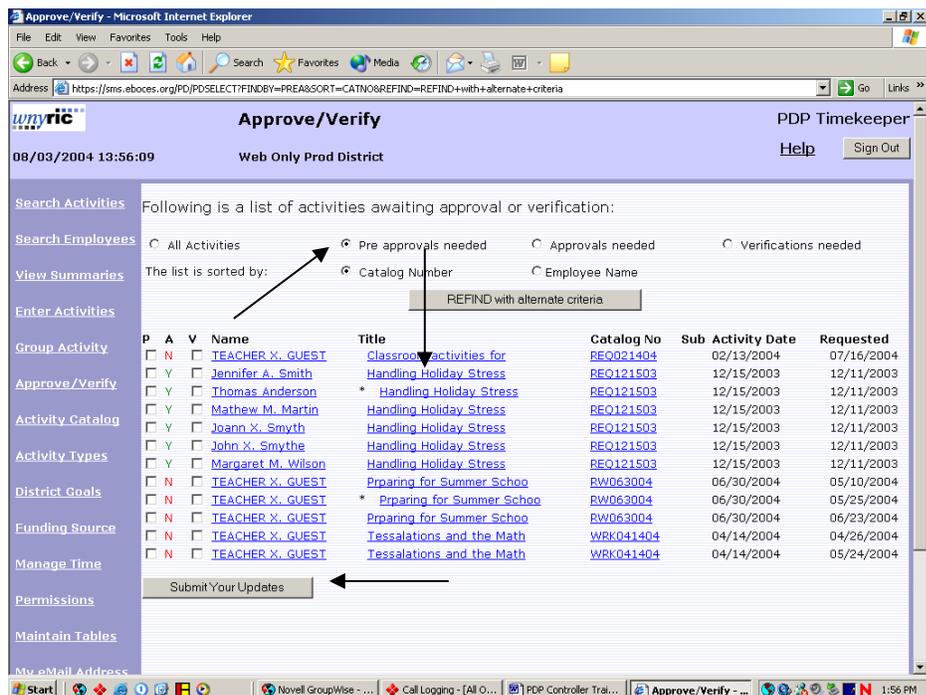
- Click in Remove From List check box to remove any employees from this activity, click in either approve or approve and verify (if this activity has already been completed) and click the Submit Activity For Selected Employees.



# Approve/Verify

The Approve/Verify option in PDP is used for Controllers and Administrators to pre-approve, approve, verify or deny activity requests from employees. Requests should be reviewed daily.

1. From any screen in PDP click on the Approve/Verify button.  
**Note:** This is the opening screen when controllers or administrators log in to PDP.
2. Use criteria options at the top of the screen to select from All activities, Pre-approvals needed, approvals needed or verifications needed.
3. Pre-approve, approve or verify activities by clicking in appropriate check boxes to the left of the chosen activity and clicking the Submit Your Updates on the bottom of the screen.



- To deny an activity request click on the activity title. At the bottom of the screen click button to the right of the denial date to input date denied and type denial reason in the comment field. Click the update approvals button.

Enter Activities - Microsoft Internet Explorer

Address: <https://sms.eboces.org/PD/PDENTRY?ACT.TYPE.CODE=I5&w=9PH28vg%3D&q=8PFx9%2FDx8vP08FINDBY=ALL>

**District Goals**

**Funding Source**

**Manage Time**

**Permissions**

**Maintain Tables**

**Import Employees**

**My eMail Address**

**Web Links**

WNYRIC

Erie 1 BOCES

\* Title: Elementary PDP Training

Justification: [Dropdown]

\* Date: 10/19/2004

Goal: [Dropdown]

Contract Hours: 0.00

Total Cost: 0.00

PDP Hours: 1.00

Funding Source: [Dropdown]

Stipend Hours: 0.00

Substitute Needed:

Submit Activity Clear the Form Delete Activity Reset

[View Summary](#) [Return to Approve/Verify](#)

[Use this link to escape updating](#)

**Approvals:**

Pre-approval Date: 10/19/2004 By: DEB REED [Back to Top](#)

Comment: [Text Field]

Approval Date: 10/18/2004 By: DEB REED

Comment: [Text Field]

Verified Date: [Text Field] By: [Text Field] Grade: [Text Field]

Comment: [Text Field]

**! Note ! A denial date is only allowed when an activity is neither approved nor verified**

Denial Date: [Text Field] By: [Text Field]

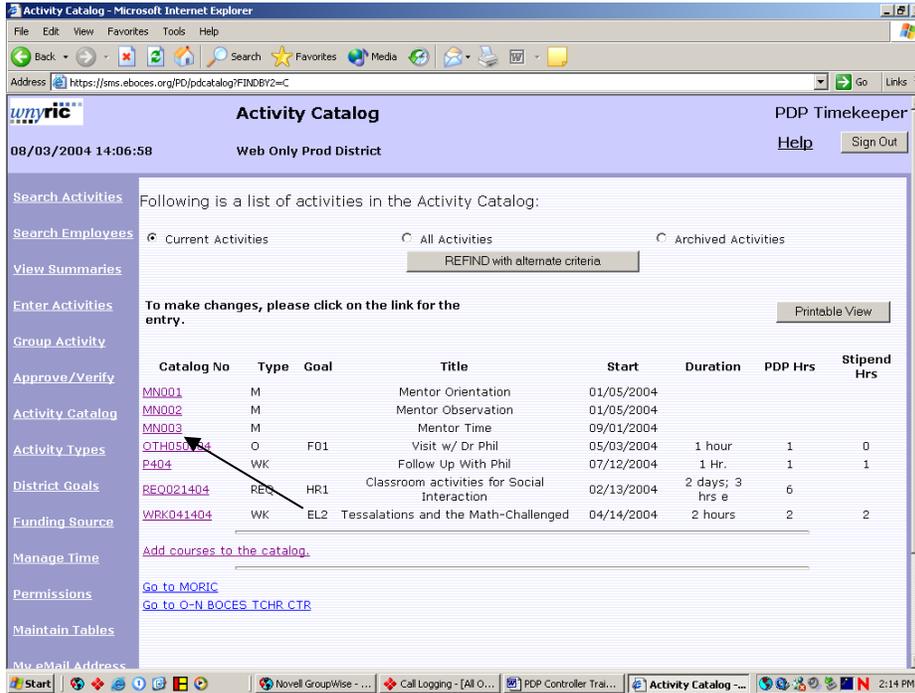
Comment: [Text Field]

Update Approvals

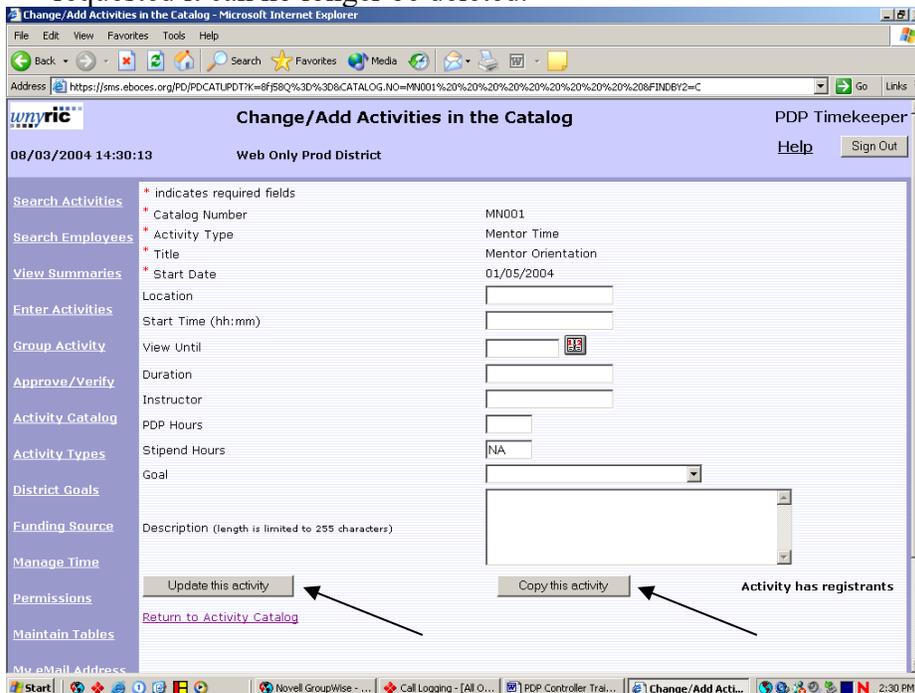
## Activity Catalogue

The Activity Catalogue option allows users to view and make changes to existing catalogue entries as well as to add new entries into the catalogue.

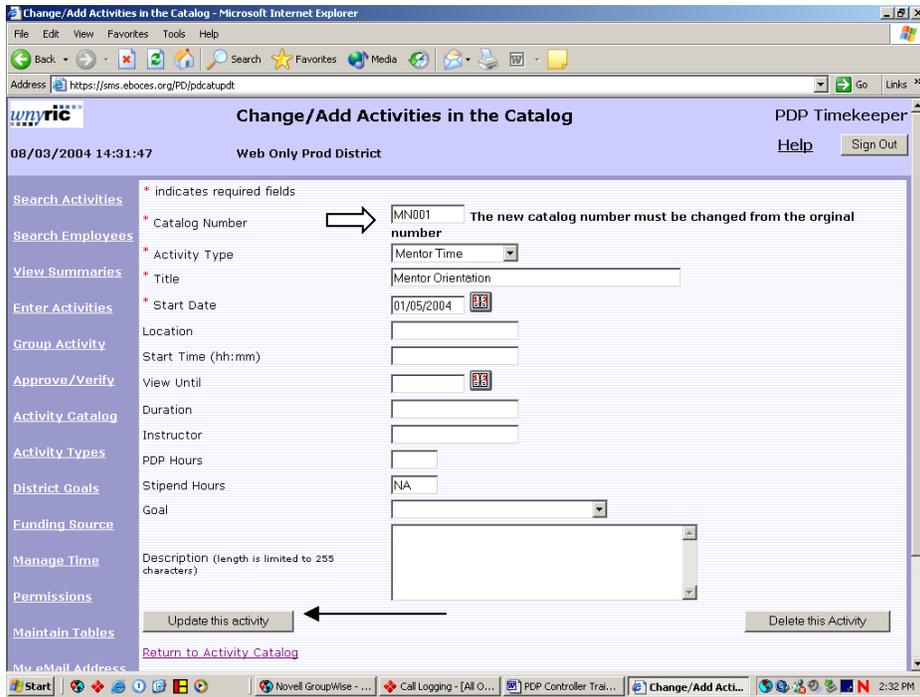
1. From any PDP screen click on the Activity Catalogue button.
2. To **update** an existing activity click on the link to the activity in the catalogue number column.



3. Make any necessary changes and click on the Update This Activity button.
- Note:** If no employee has requested this activity it may be deleted. Once it has been requested it can no longer be deleted.



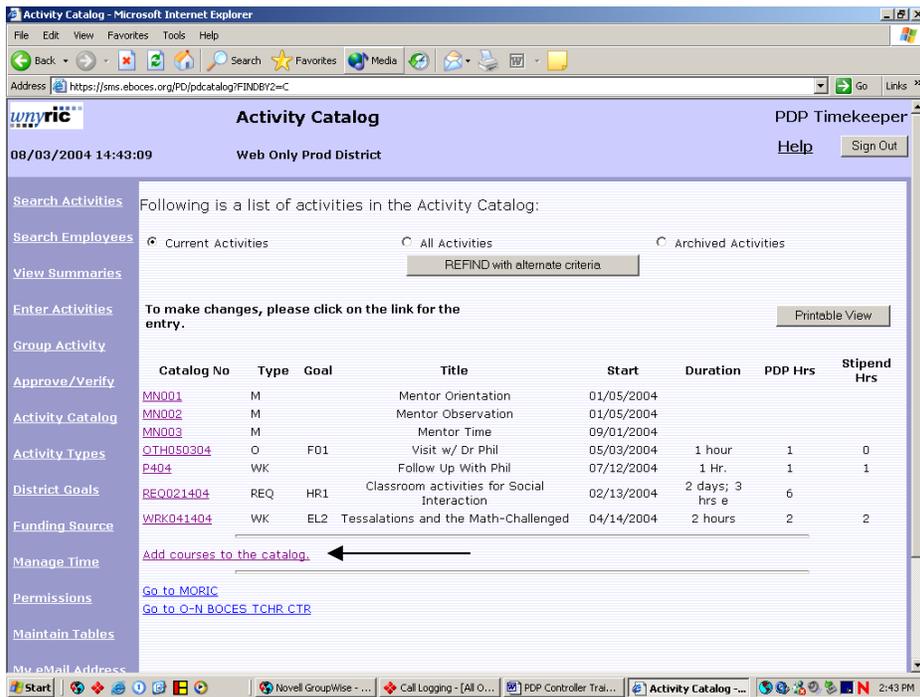
4. To copy an existing activity into a new activity click the Copy This Activity button.



5. The catalogue number **must be changed**. Make any other required changes and click the Update This Activity button to add to the catalogue.

6. Click the Return To Activity Catalogue link to return.

7. To add a new activity to the catalogue, click the Add Courses To The Catalogue link.

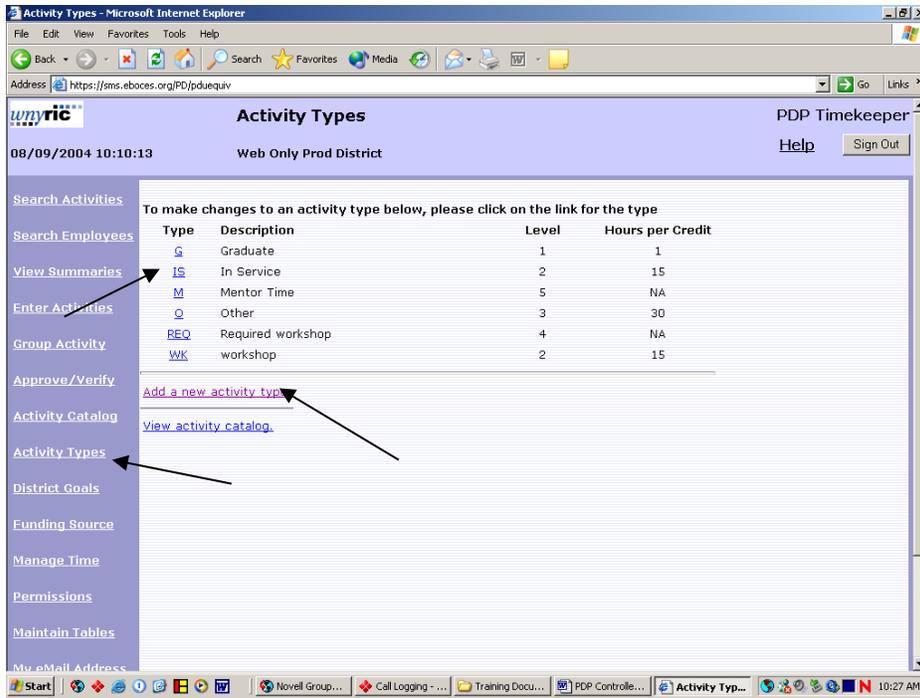




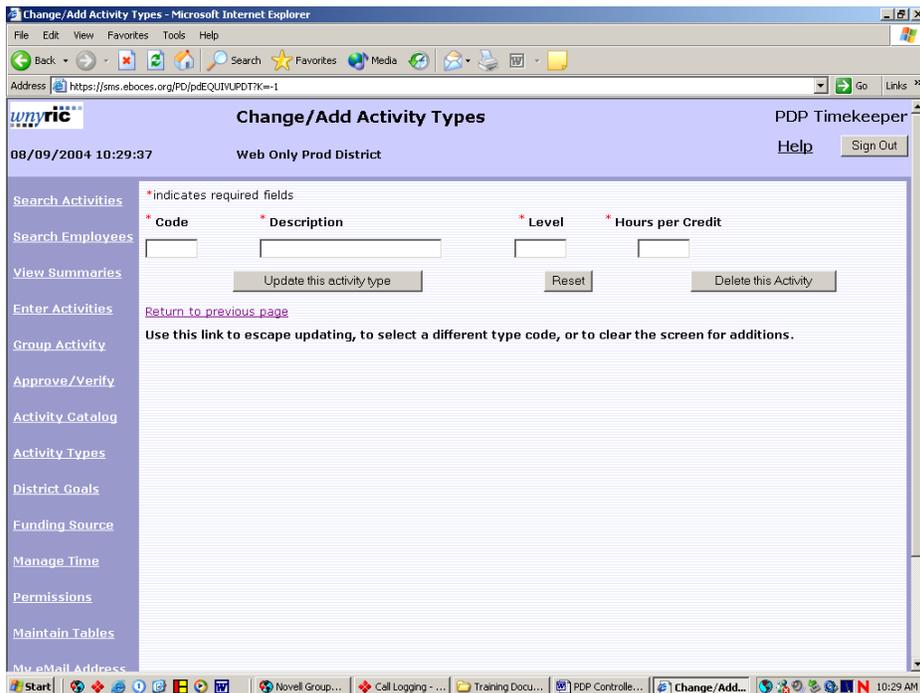
# Activity Types

Activity Types allow the district to group activities in the catalogue in district defined groups and to assign hours per credit to facilitate tracking hours for stipend pay.

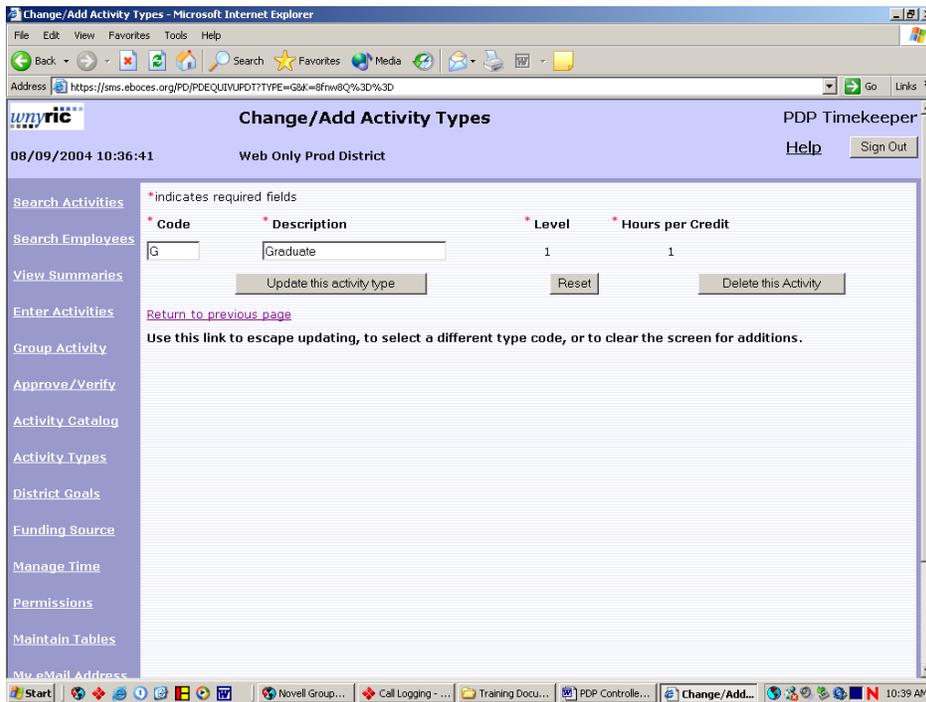
1. From any PDP screen click on the Activity Types button.



2. To add a new activity Click on the Add a new activity type button.



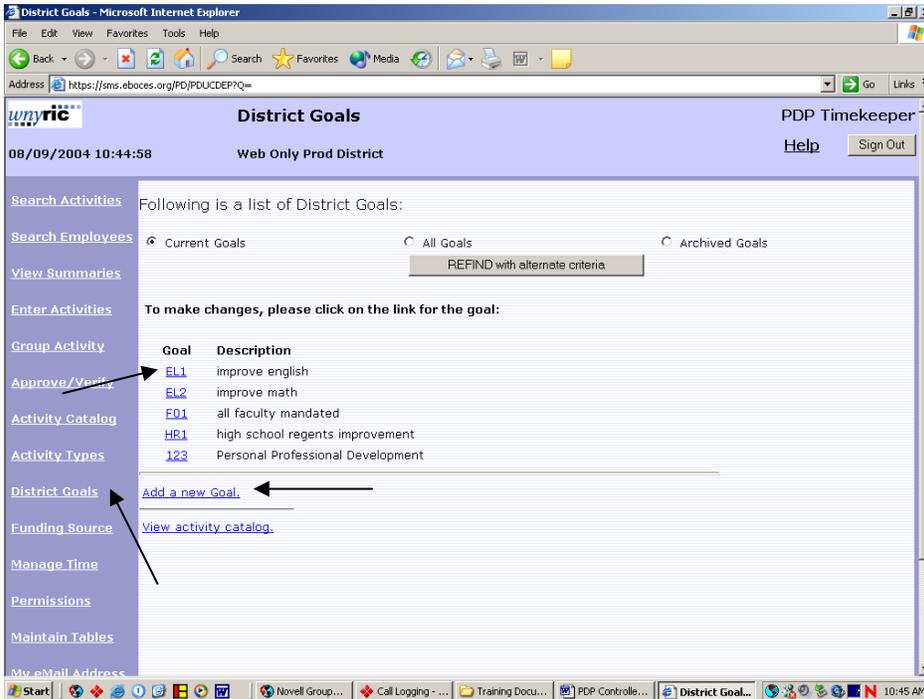
3. Fill in the 5 character code, a description, the level and hours per credit. Click the update this activity button.
4. To update an existing activity click on the activity code to be changed. The user may then change the code or the description only. Click the update this activity button.



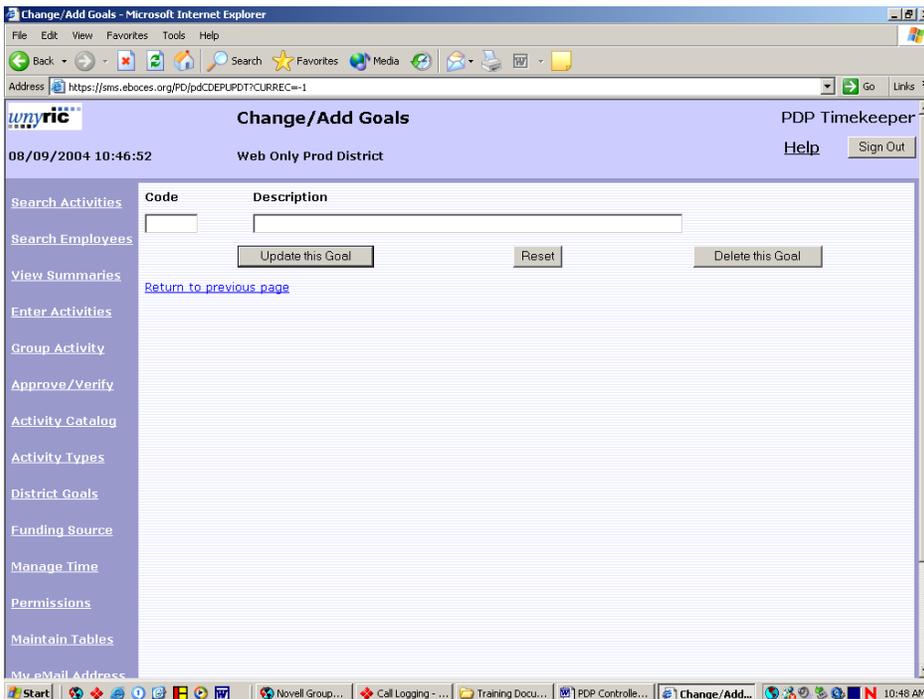
# District Goals

District goals allow the district to track hours accumulated to reach district defined goals.

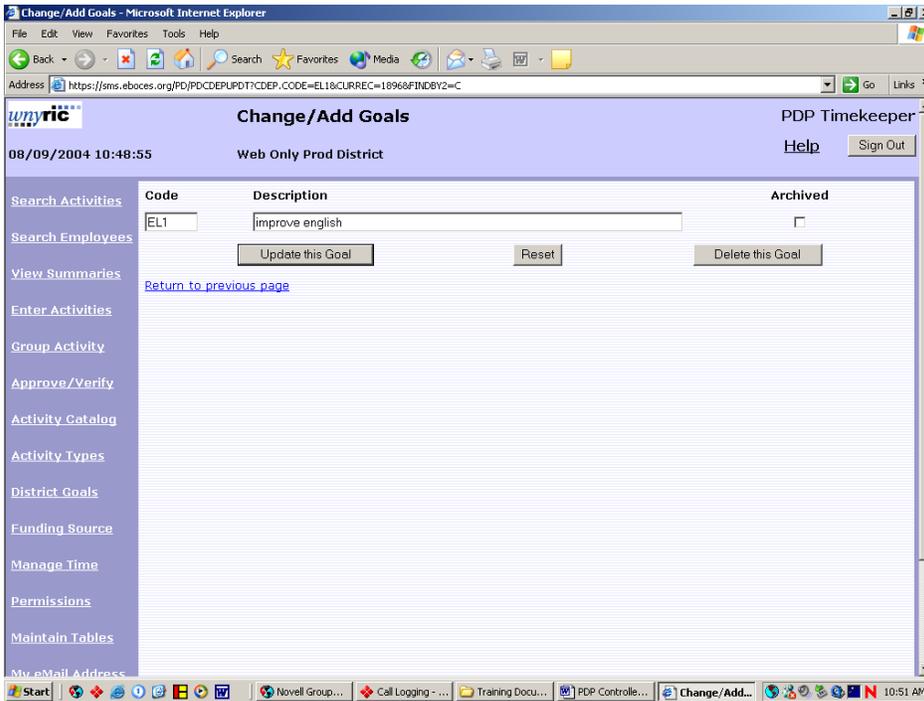
1. From any PDP screen click on the District Goals button.



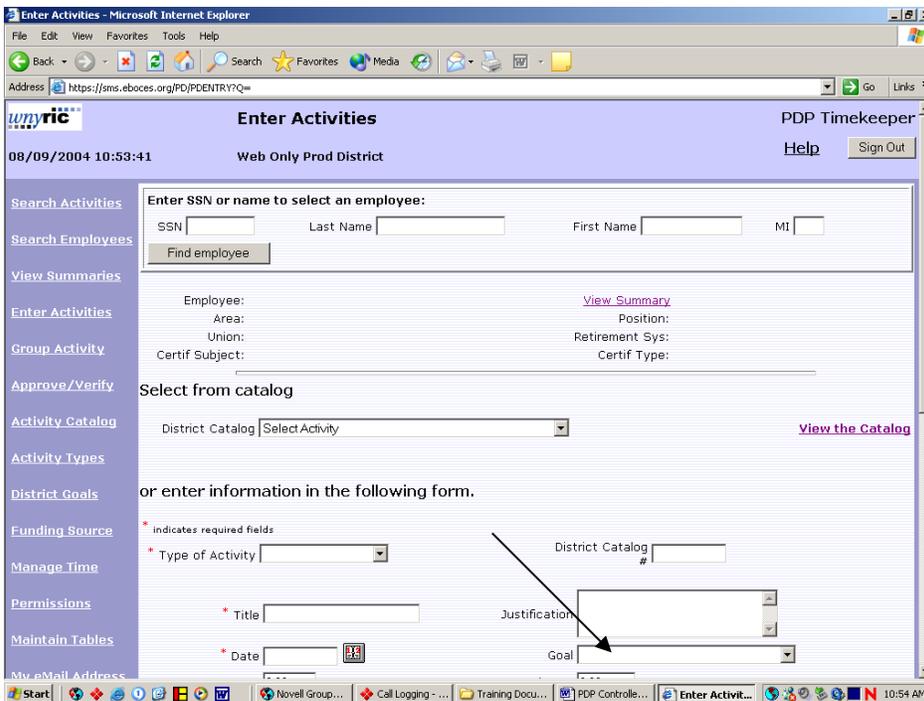
2. To add a new goal click on the add a new goal button. Fill in up to an 8 character code and a description and click on the update this goal button.



- To update or archive an existing goal click on the goal code. Make any necessary changes to the code or the description. To archive, click on the archive check box. Click on the update this goal button to save.



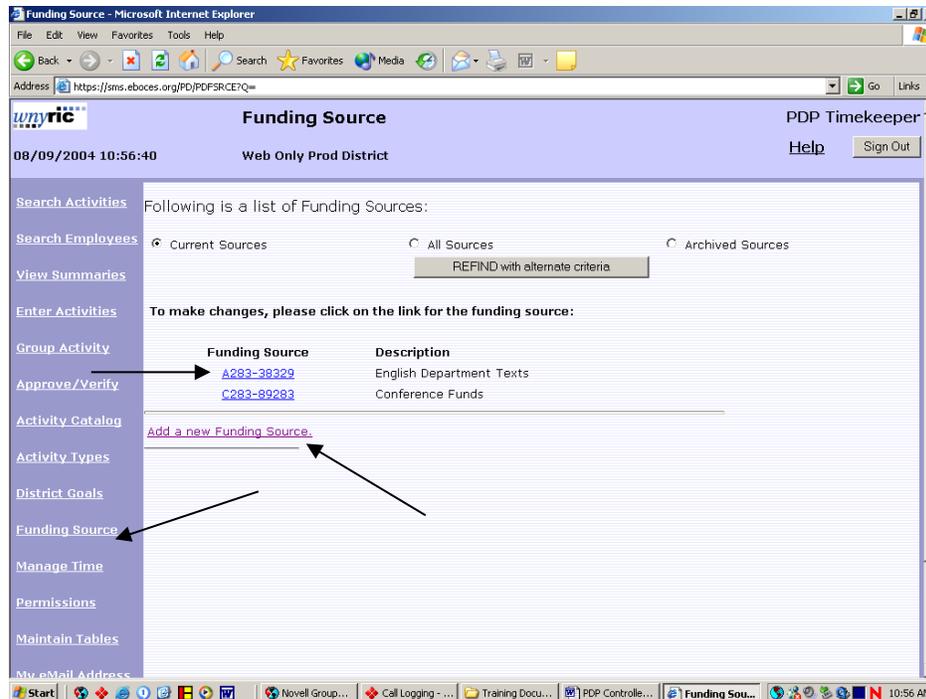
- Users may now add a District Goal to an individual activity by clicking on the Enter Activities button and selecting the goal in the Goals drop down list.



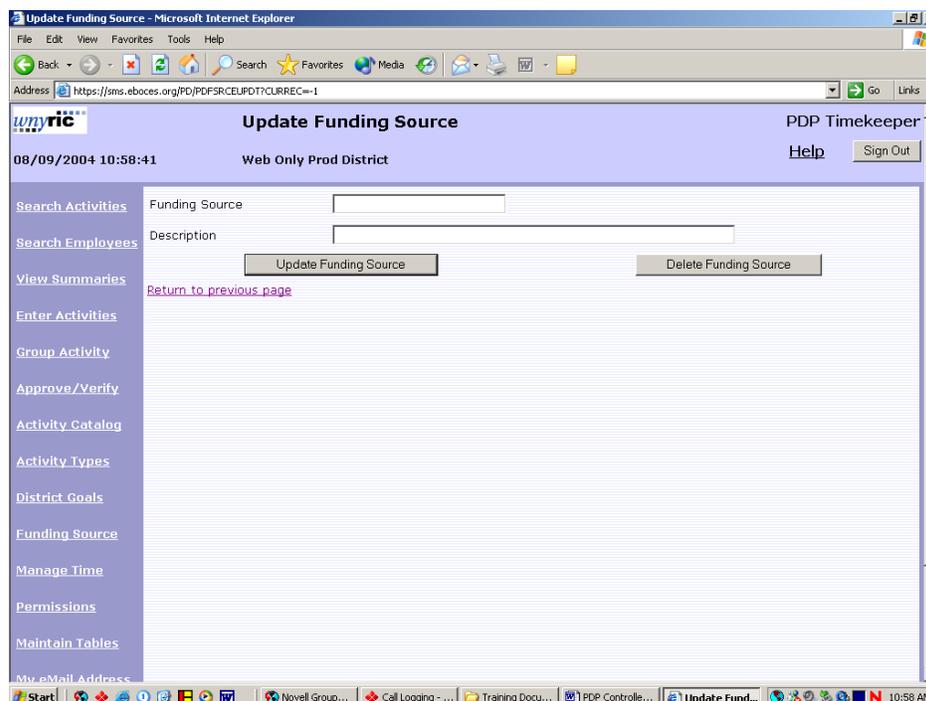
# Funding Source

Funding sources may be attached to individual activities allowing the district to track groups of activities by the source of funding.

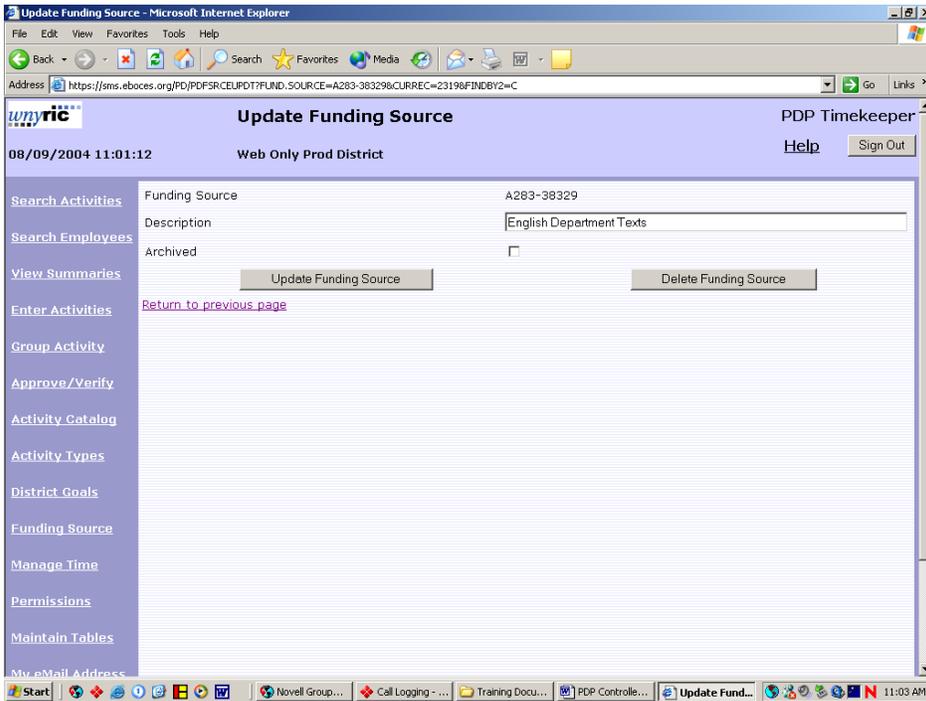
1. From any PDP screen click on the Funding Source button.



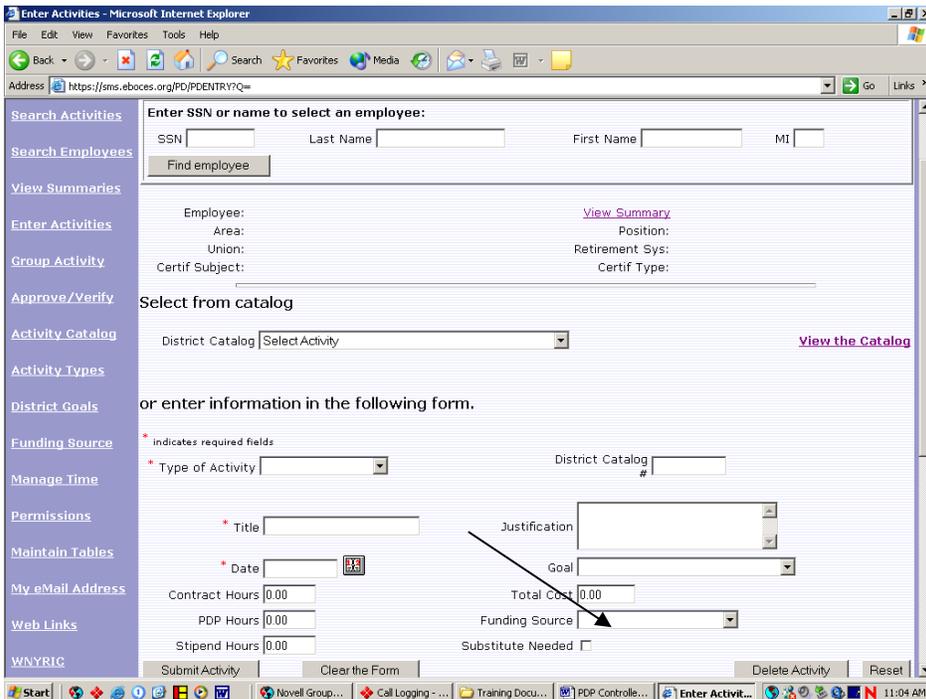
2. To add a new funding source, click the add a new funding source button. Fill in the funding source and description. Click the update funding source button.



- To update or archive an existing funding source. Click on the funding source code to be updated. Then update the description or click in the archive check box to archive. Click the update funding source button to save.



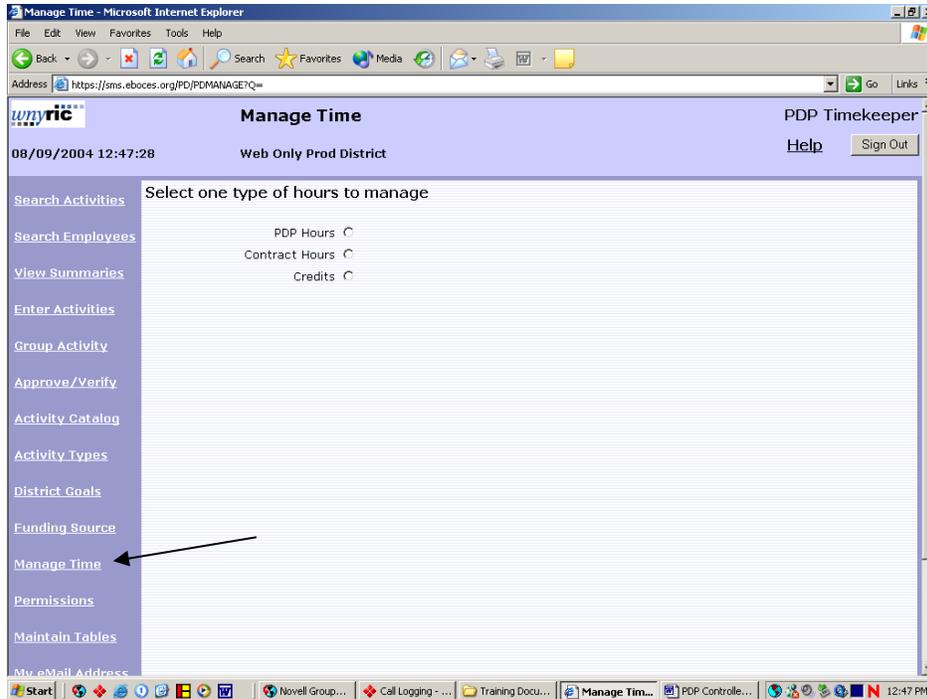
- Users may now add a Funding Source to an individual activity by clicking on the Enter Activities button and selecting the source in the Funding Source drop down list.



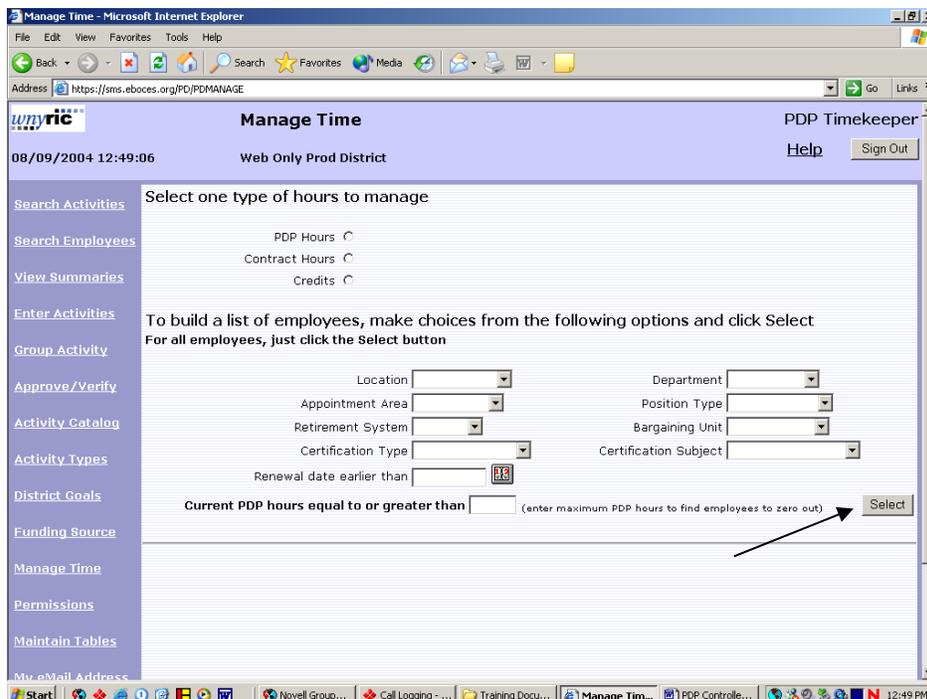
# Manage Time

The manage time option is used to archive time accumulated at the end of the year. By archiving the district can track how many hours were accumulated in the current year.

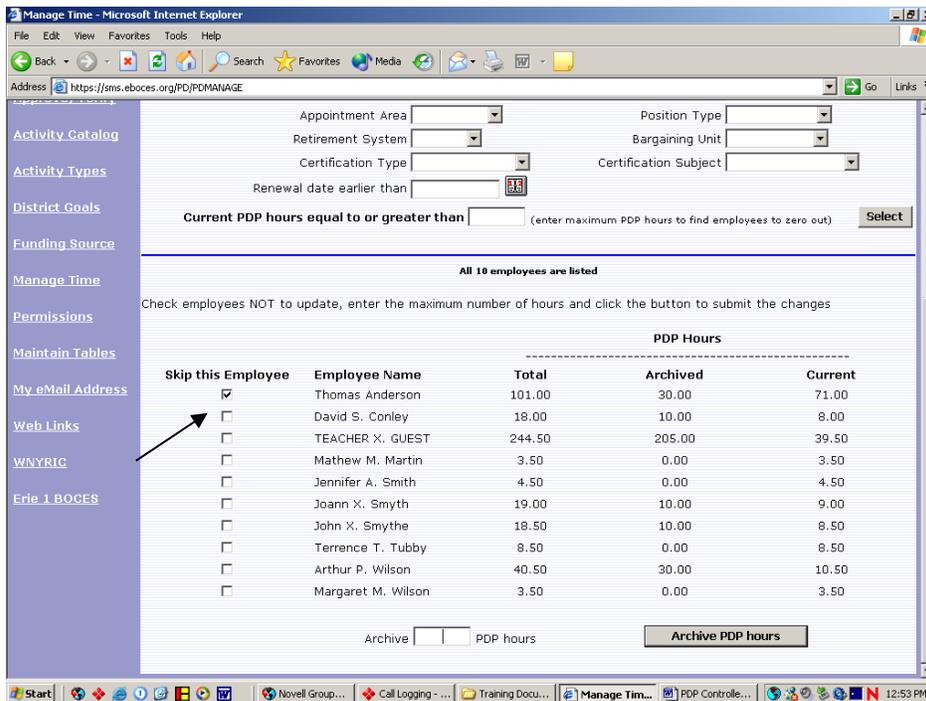
1. From any PDP screen click on the Manage Time button.



2. To archive time select the type of time to be archived. PDP Hours, Contract Hours or Credit Hours.



3. Enter selection criteria to view a specific group of employees or leave criteria blank to view all employees and click the select button.



4. To skip and not archive an employee click the skip check box to the left of the employee.
5. Enter the number of hours to be archived and click the archive hours button.
6. The system will move the hours from the current column to the archive column.

## Permissions

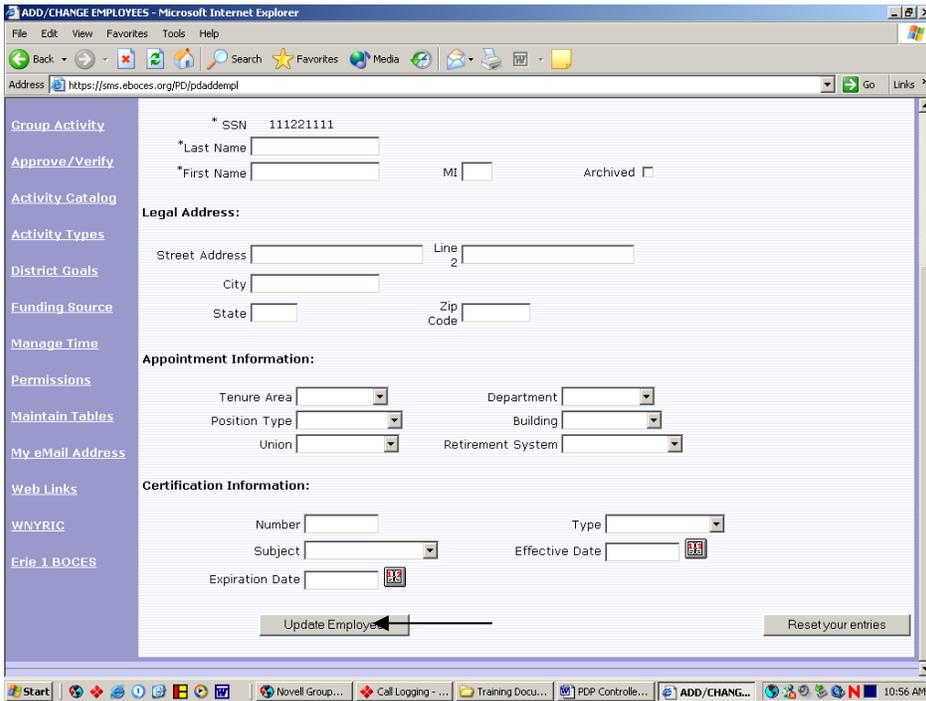
The permissions option is used to Add or modify employee information, to set user level access to the PDP system and to generate a user ID and password. A new employee may be added as a teacher/employee or an administrator. Note: To set an employee as a controller contact BOCES support.

### Adding/Modifying an Employee

To add a new employee first the employee information should be added and the user ID and level of access should be set up.

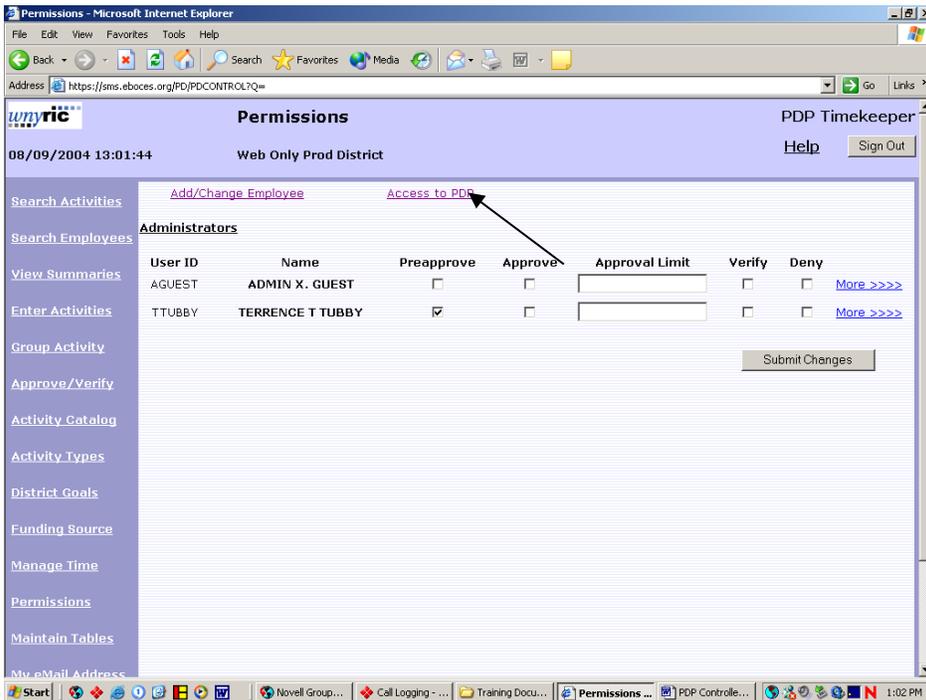
1. From the Permissions screen Click the Add/Change button.
2. Enter the employee's SSN and click the find employee button.

3. If the employee is already in the database the employee's data will appear and now may be modified by making changes and clicking the update employee button. If not the fields will be blank and the new employee data may be added. Then click the update employee button.

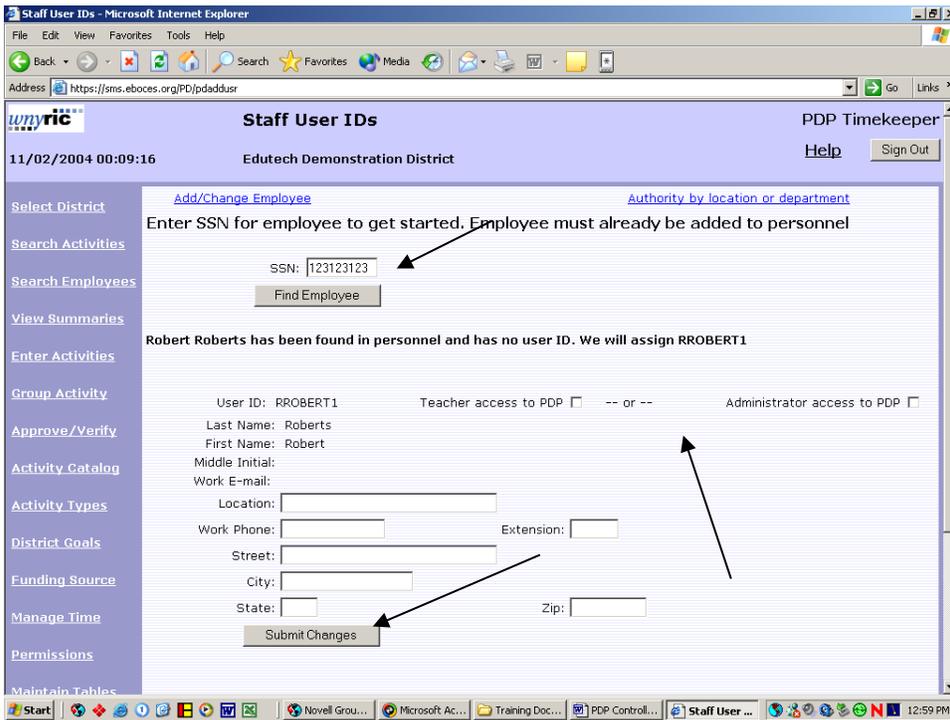


## Setting User Teacher or Administrator Access

1. From any PDP screen click on the Permissions button.



2. Click the access to PDP button on the top of the screen
3. Fill in the employee's SSN and click find employee.

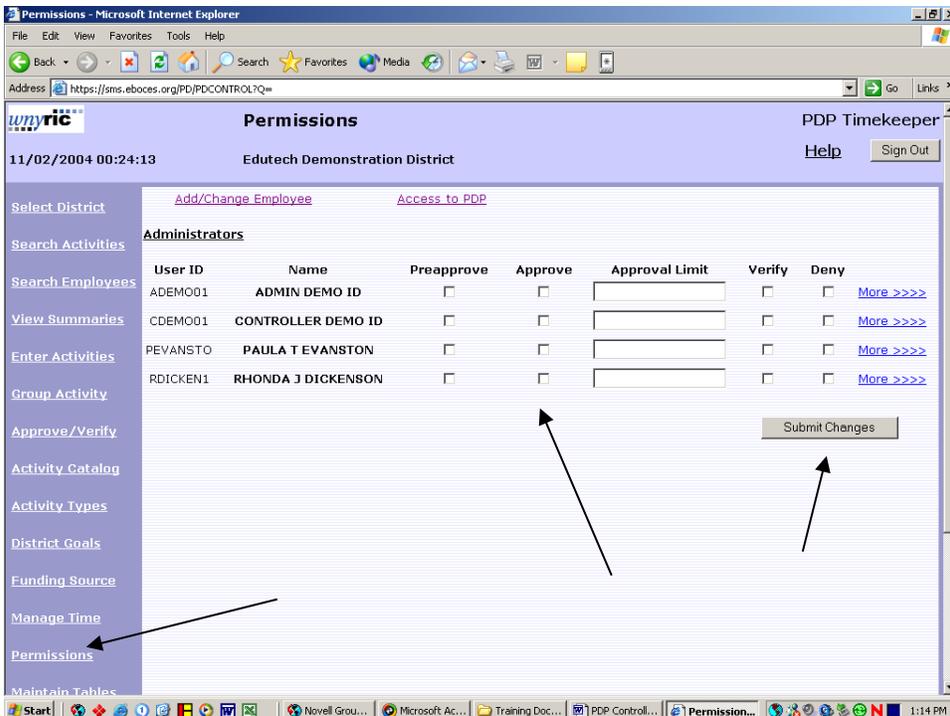


4. Select teacher or Administrator access and click submit changes.
5. The system will create the user ID and password automatically. The user ID will appear at the top of the screen and the password will be first and last initial plus the last 6 digits of the employee's SSN.

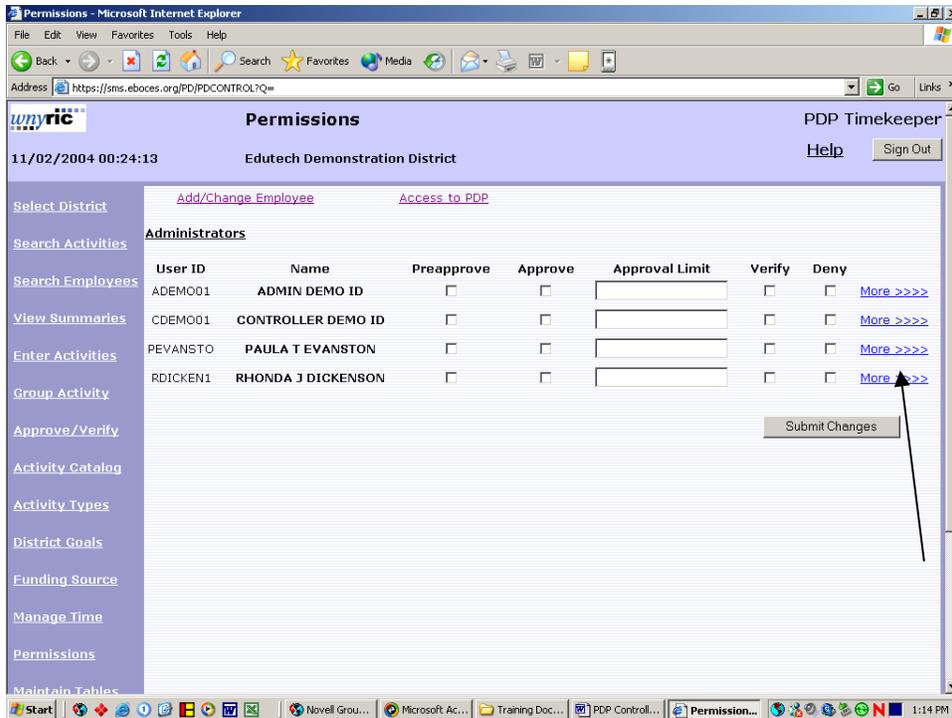
### Giving Approval Access

Administrators and controllers may given access to pre-approve, approve, verify or deny activity requests from employees.

1. From any PDP screen click on the permissions button on the left side of the screen.



- To restrict access to a specific action click the check box next to the action and click the submit changes button. If all options are left blank the administrator will have access to perform all approval actions.
- To set approval access for a specific building or department click the more button on the right side of the screen.

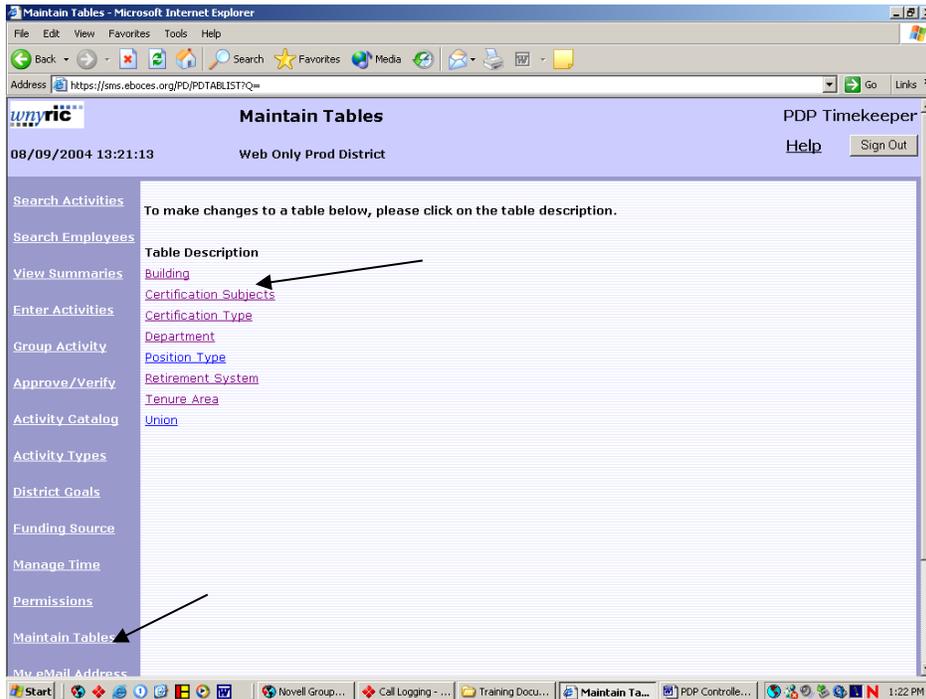


- Click the check box next to the building and/or the department and click submit changes on the bottom of the screen. Leaving these blank will give the administrator access to all buildings and departments.

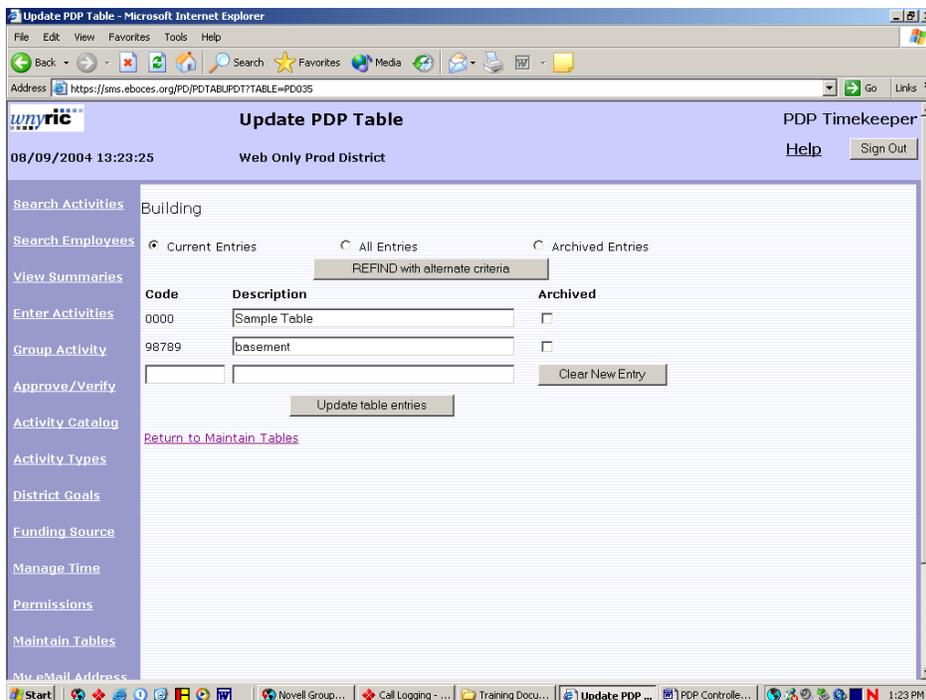
# Maintain Tables

The maintain tables option allows the district to add or archive specific criteria for grouping employees together. The tables are buildings, certification subjects, certification types, departments, position types, retirement system, tenure area and union. These tables are not required, but they are useful in restricting searches to specific criteria.

1. From any PDP screen click on the Maintain Tables button.



2. Click on the table to be updates.

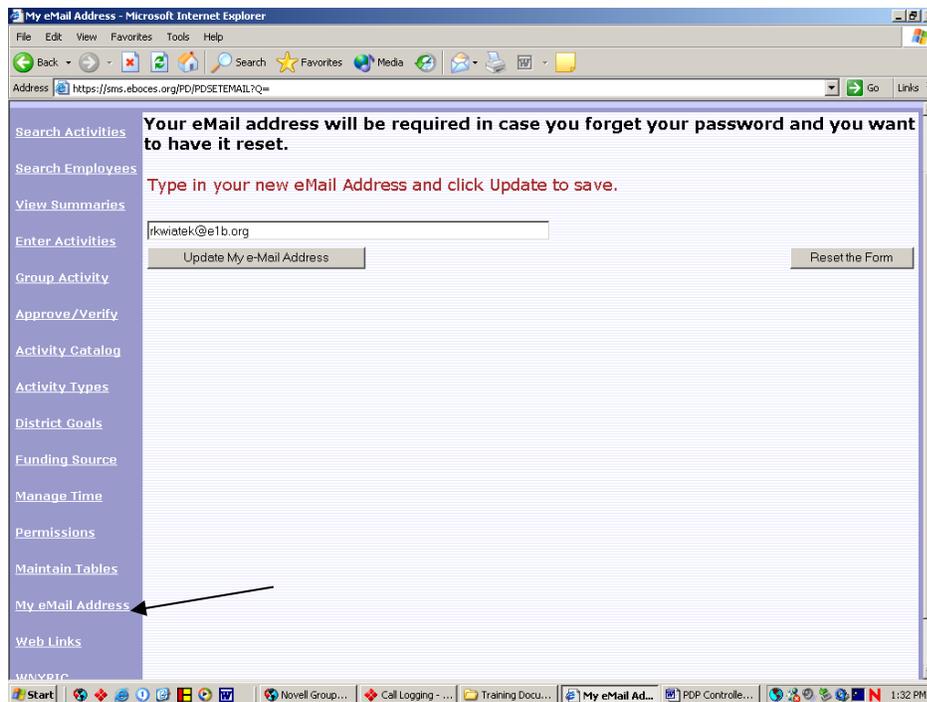


3. Fill in the code and description and click the update table entries button to save.
4. To archive click the archive check box and click the update buttons.
5. To view archived entries select archived entries and click the refind with alternative criteria button.

## My E-Mail Address

All employees can set or update their own e-mail address within the system. The e-mail address is used by PDP to send automatic e-mails when a controller or administrator adds a group activity or when a user forgets their password and requests a password reset.

1. From any PDP screen click on the My E-Mail Address button.

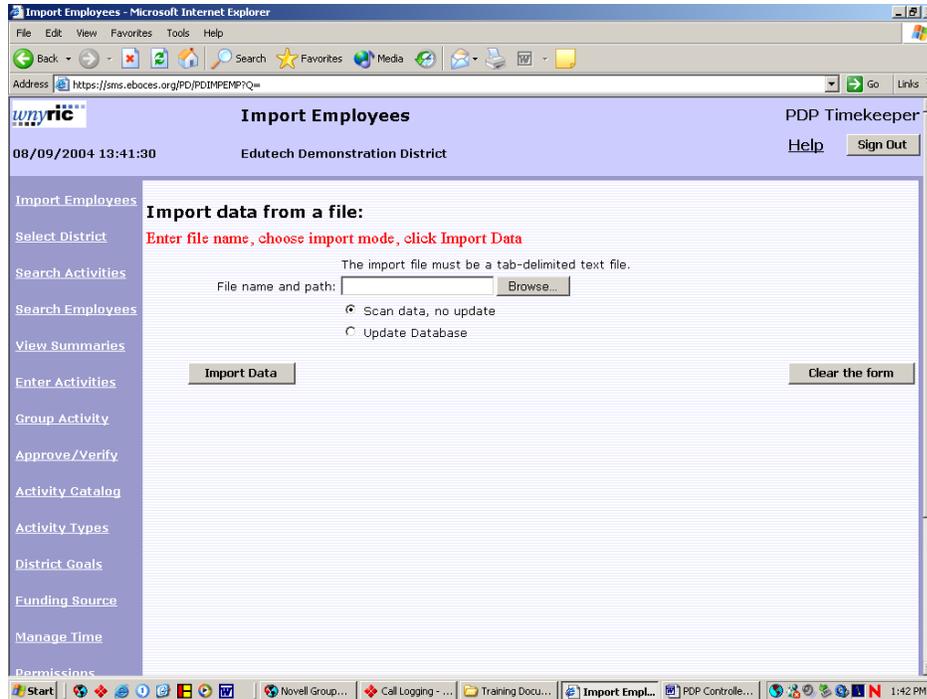


2. Fill in the e-mail address and click the update my e-mail address button.

# Import Employees

Controllers have the ability to upload a group of employees into the database. The file must be in a tab delimited format spread sheet. See appendix B for the file layout.

1. From any PDP screen click on the Import Employees button.



2. Fill in the path to the file or click browse to find.
3. The scan data, no update option is used to verify the data is correct without importing. Use this option first to validate the data will upload correctly. If so repeat steps using the update database option.
4. Contact Boces to run batch routine to create user IDs.

## Definitions

**Activity**—any professional development activity that the district wishes to track, e.g. Workshop: “Using Computers in Science Class”

**Activity Type**— Activity categories, e.g. In-service, Workshop, Grad Course and more

**Catalog**—listing of professional development activities offered by the district, a college, BOCES, etc.

**Approve**—give the employee the go-ahead to take a course or other activity

**Verify**—indicate that proof of completion of an activity has been submitted; assign value

**PDP Hour**—time value awarded to an activity for SED requirement of 175 hours every 5 years

**Contract Hour**—time value awarded to an activity to meet district contractual requirements for professional development each year

**Stipend Hour** - time value awarded to an activity to build toward an advancement in salary

**Stipend Credit**—credit earned after a given number of stipend hours are completed

**Level**—all activity types with the same weight are grouped into one level for totaling purposes

**Block**—number of credits needed to earn a stipend or to advance on salary schedule

**Funding Source**—budget code or other basis of payment for a requested activity

**PDP Import File Field Specifications**

*Employee Record Data*

<i>Field #</i>	<i>Description</i>	<i>Maximum length</i>
1*	SSN	11
2*	Last Name	16
3*	First Name	14
4	Middle Init	1
5	Address 1	20
6	Address 2	20
7	City	20
8	State code	2
9	Zip.	10

*Appointment Record Data*

<i>Field</i>	<i>Description</i>	<i>Maximum length</i>
10	appointment(tenure) area code	8
11	appointment(tenure) area name	45
12	Department code	8
13	Department name	45
14	Position (employee) type code	8
15	Position (employee)type name	45
16	Bargaining unit code	8
17	Bargaining unit name	45
18	Building code	8
19	Building name	45
20	Retirement System code	8

*Certification Record Data*

<i>Field</i>	<i>Description</i>	<i>Maximum length</i>
21	Certification number	11
22	Certification Type	8
23	Area of Certification code	8
24	Area of certification words	45
25	Certification Date	8
26	Certification expiration Date	8
27	blank column	

**\* Required Fields**

*File notes:*

- Tab delimited text file
- Provide only one appointment record and one certification record per employee.
- Data elements not loaded electronically may later be added manually within PDP Timekeeper.

## Suggested Reports

Although PDP does not have an actual report creation area many of the screen may be use to generate reports by clicking on the printable view button. The following is a list of reports that can be created this way.

**Note:** Any of the following reports can be modified by use multiple criteria. Such as in Search Activities selecting a building and a date will give a report of all activities for a specified building for a specified date and can be used to verify the number of subs needed.

Report Name	Purpose	How To run
Class Roster	A listing of all employees enrolled in a specified class or seminar.	In <b>Search Activities</b> select by activity.
Activities by Status	A listing of all activities by a given current status.	In <b>Search Activities</b> select by status.
Activities by Type	A listing of activities by district defined categories.	In <b>Search Activities</b> select by activity type.
Activities by Goals	A listing of activities tied to a district defined goal.	In <b>Search Activities</b> select by goal.
Activities by Building	A listing of activities for a specified building.	In <b>Search Activities</b> select by building.
Activities by Funding Source	A listing of activities for a specified funding source.	In <b>Search Activities</b> select by funding source.
Employees with no PDP credit	A listing of employees without any current PDP hours.	In Search Employees click on employees with no current PDP credit check box.