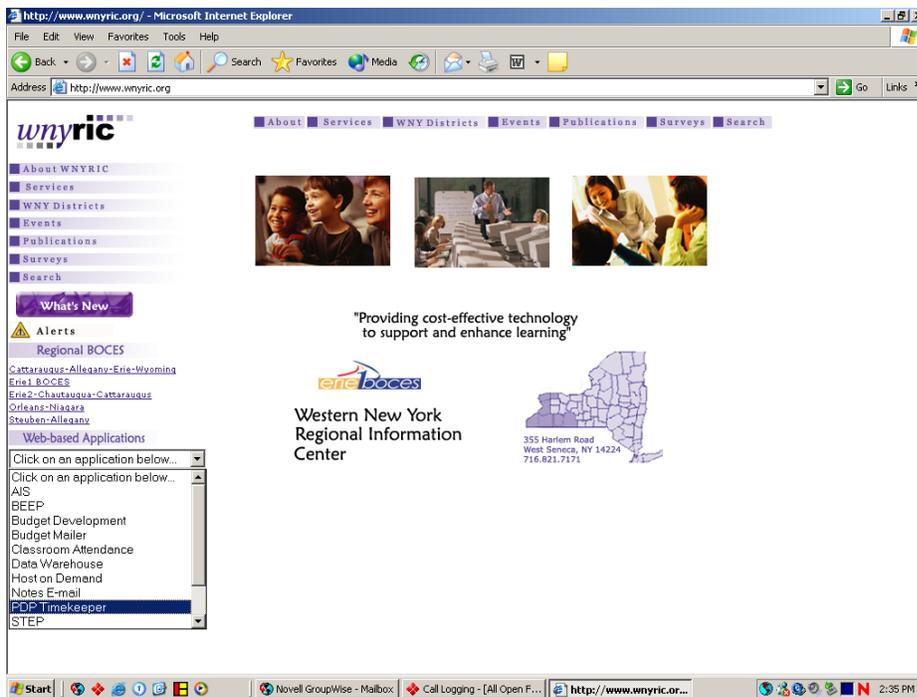


Table of Contents

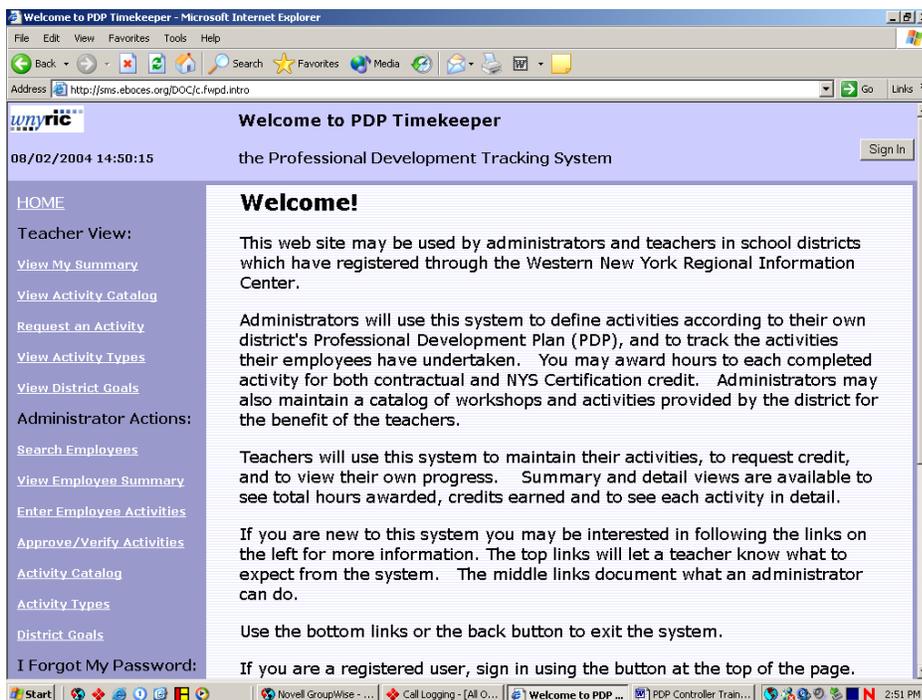
Page #	Menu Options
1-1 -----	Logging Into PDP Timekeeper
2-1 -----	Search Activities – Report creation and printing
3-1 -----	Search Employees – View and updating employee information for existing employees.
4-1 -----	View Summaries – View summary information for selected employees
5-1 -----	Enter Activities - Adding activity requests for a single user including yourself
6-1 -----	Group Activity - Adding activity requests for a group of users
7-1 -----	Approve/Verify – Updating the status of requested activities
8-1 -----	Activity Catalogue – Viewing, adding and updating activities in the catalog
9-1 -----	Activity Types – Viewing, adding and updating activity types
10-1 -----	District Goals – Viewing, adding and updating district goals
11-1 -----	Funding Source – Viewing, adding and updating funding sources
12-1 -----	My E-Mail Address – Updating current e-mail address for PDP
Appendix A	Definitions
Appendix B	Import File Specifications
Appendix C	Suggested Reports – A listing of suggested reports

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.

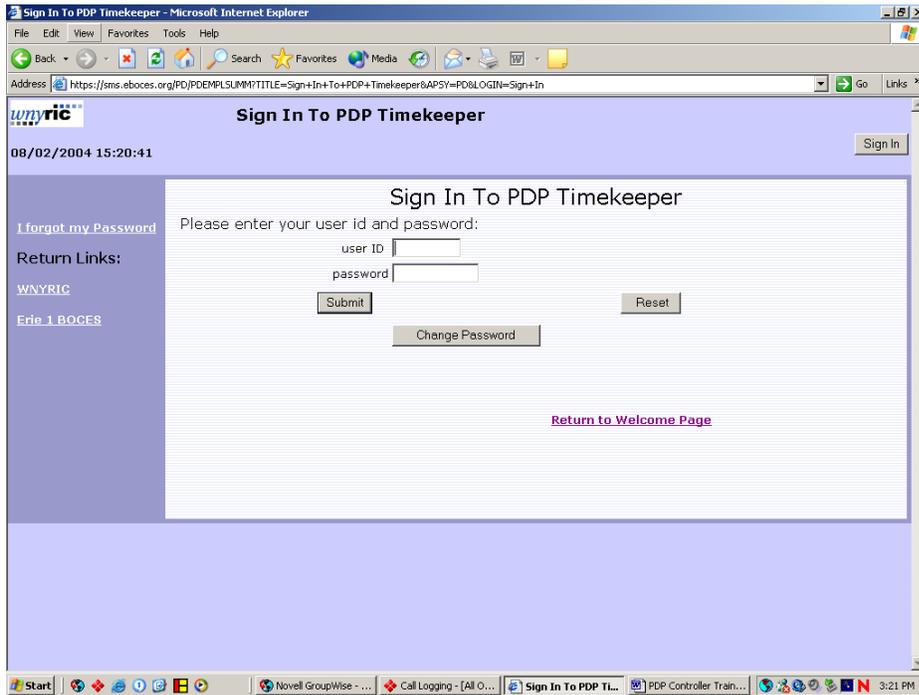


3. When the log in screen appears click on the Sign In button in the upper right corner of the screen.



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.

Approve/Verify - Microsoft Internet Explorer

Address: https://sms.ebores.org/PD/PDEMPUSUMM?TITLE=Sign+In+To+PDP+Timekeeper&APSY=PD&LOGIN=Sign+In

Approve/Verify PDP Timekeeper

08/03/2004 09:09:48 Web Only Prod District Help Sign Out

Search Activities: Following is a list of activities awaiting approval or verification:

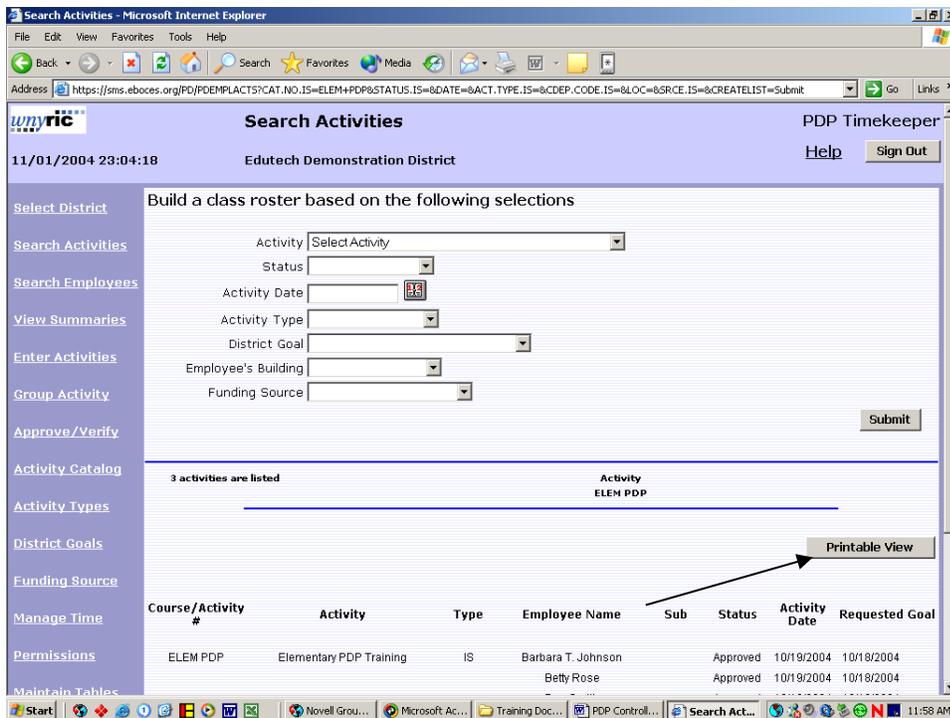
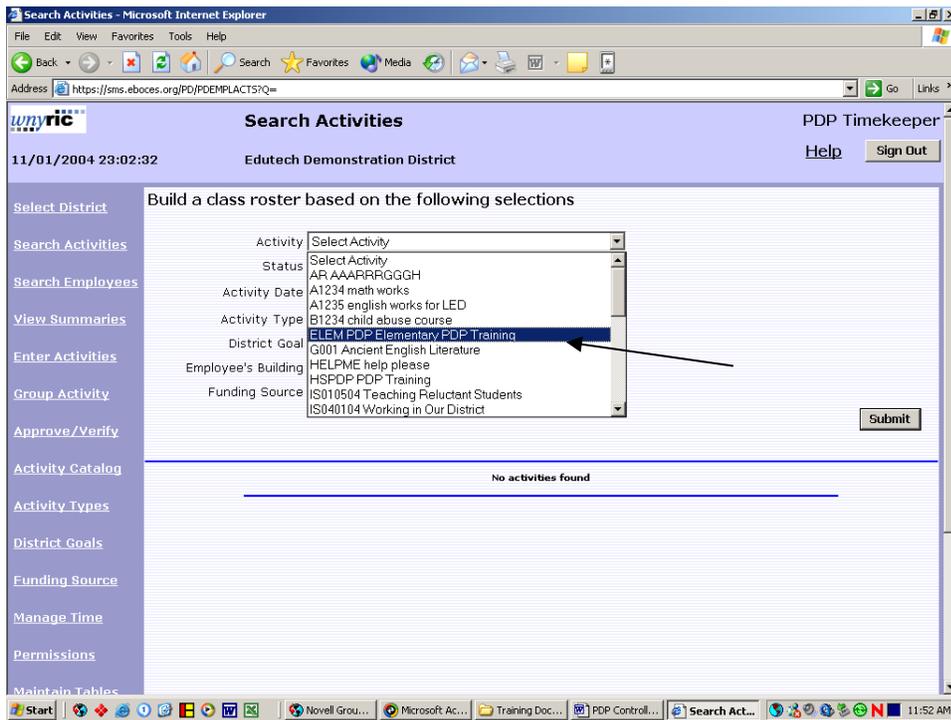
Search Employees: All Activities Pre approvals needed Approvals needed Verifications needed

View Summaries: The list is sorted by: Catalog Number Employee Name

Enter Activities:

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.

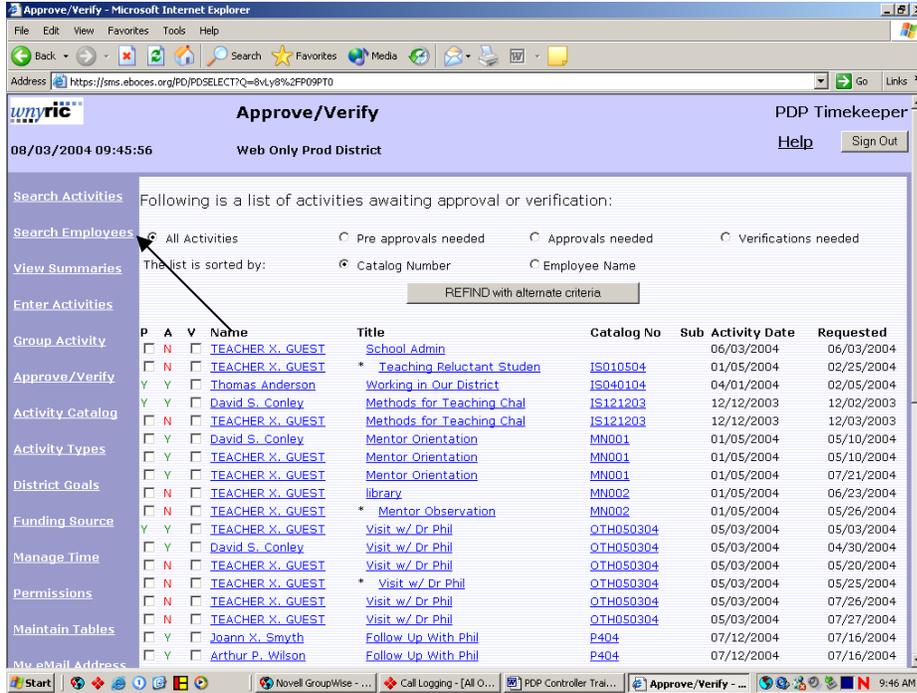


3. To print a report version of the screen click on the Printable View button.

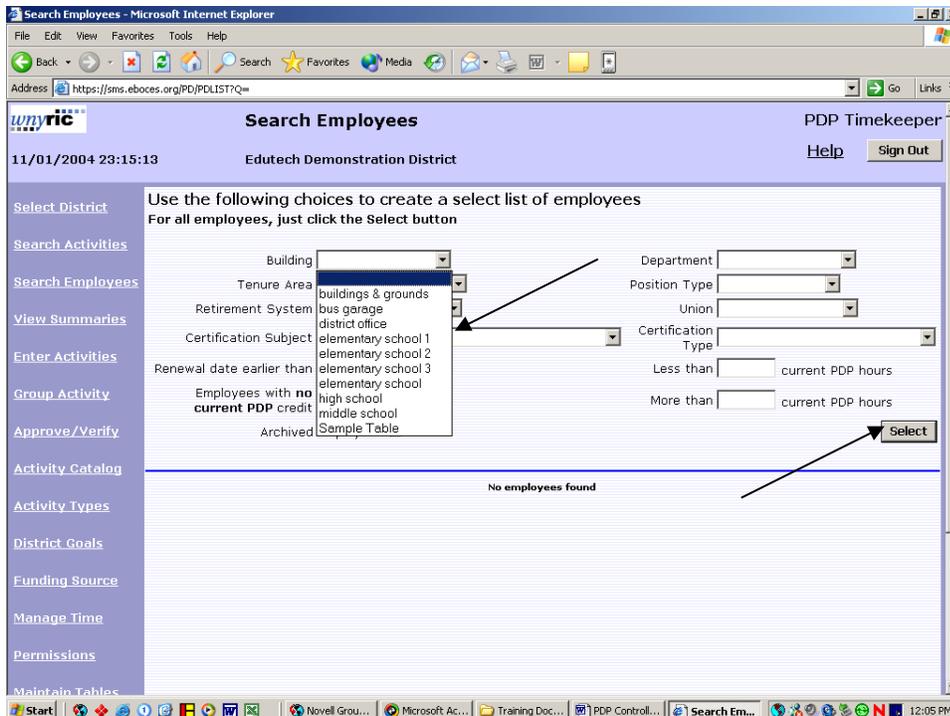
Search Employees

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.

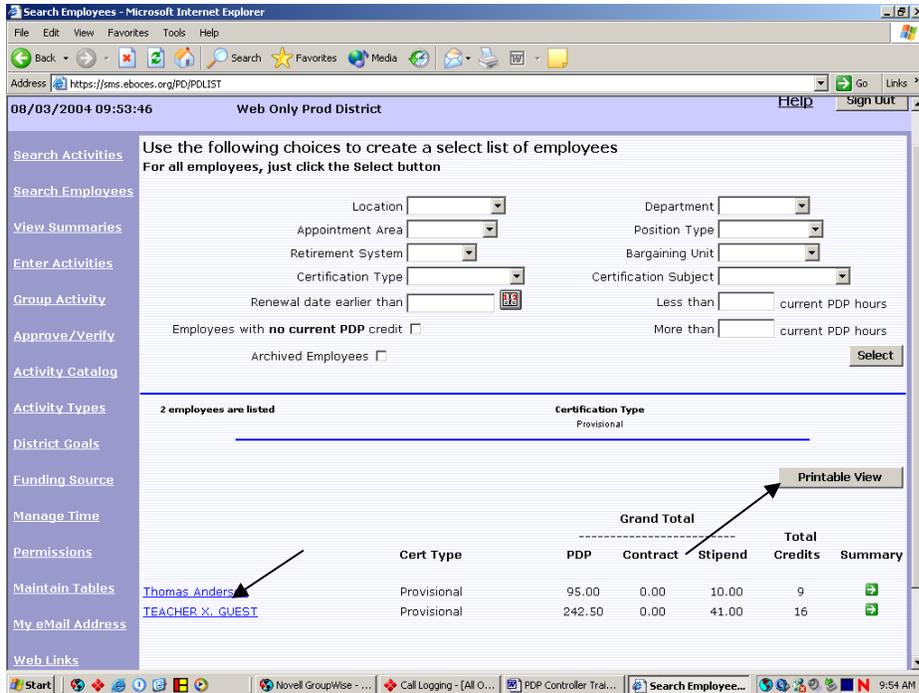
1. From any screen in PDP click on the Search Employees button.



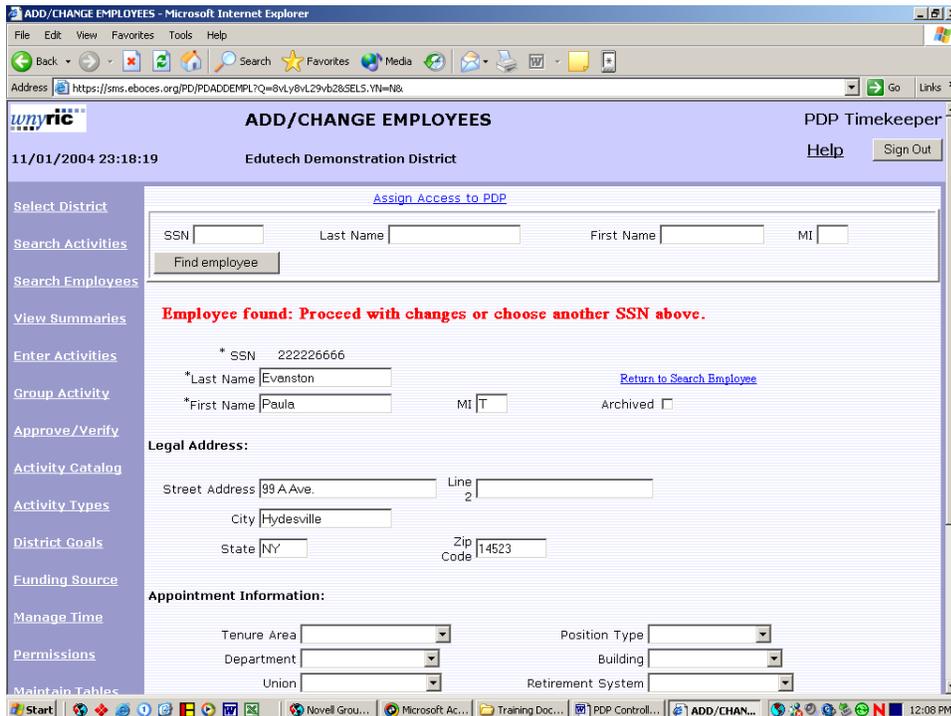
2. Fill in any search criteria to search for a specific group of employees or leave criteria blank to view all employees. Click the Select button.



- 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.

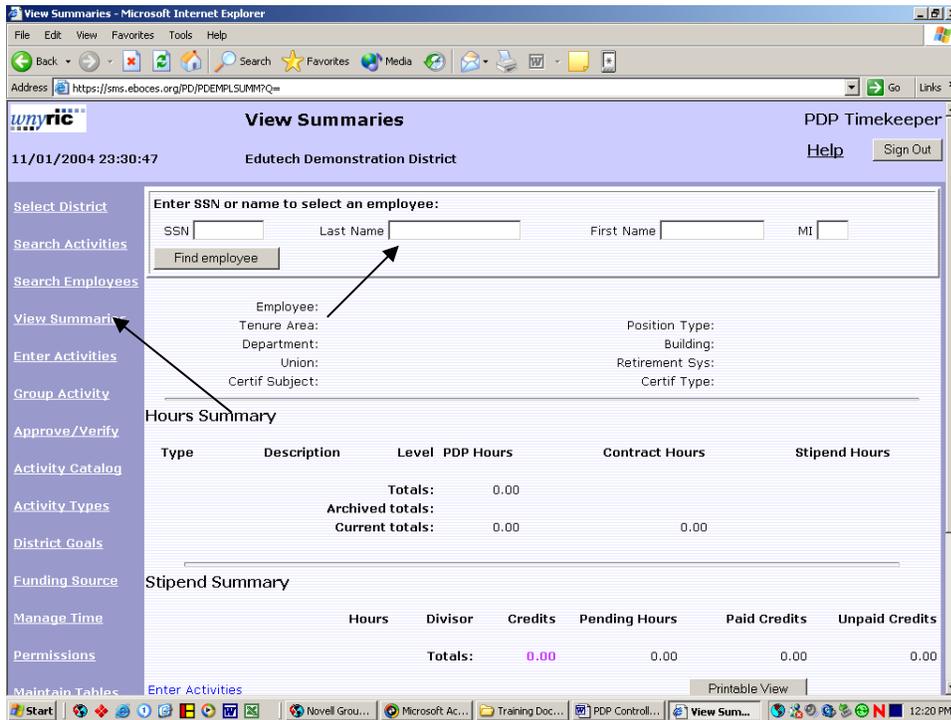


- Make necessary changes and click the update employee button at the bottom of the screen.

View Summaries

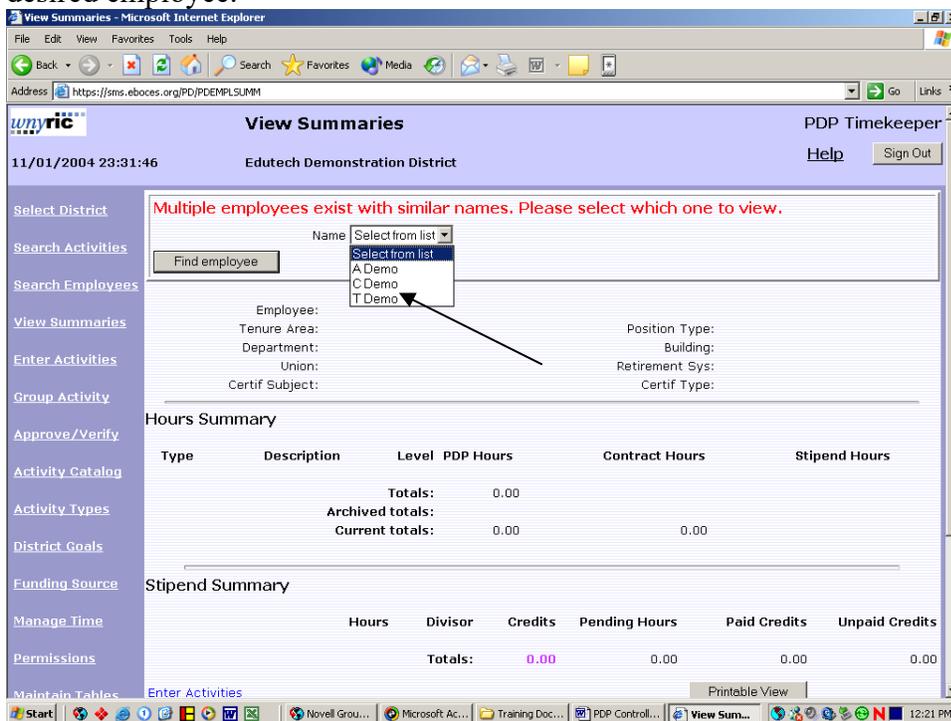
View Summaries is another way for administrators and controllers to access summaries for individual employees.

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.

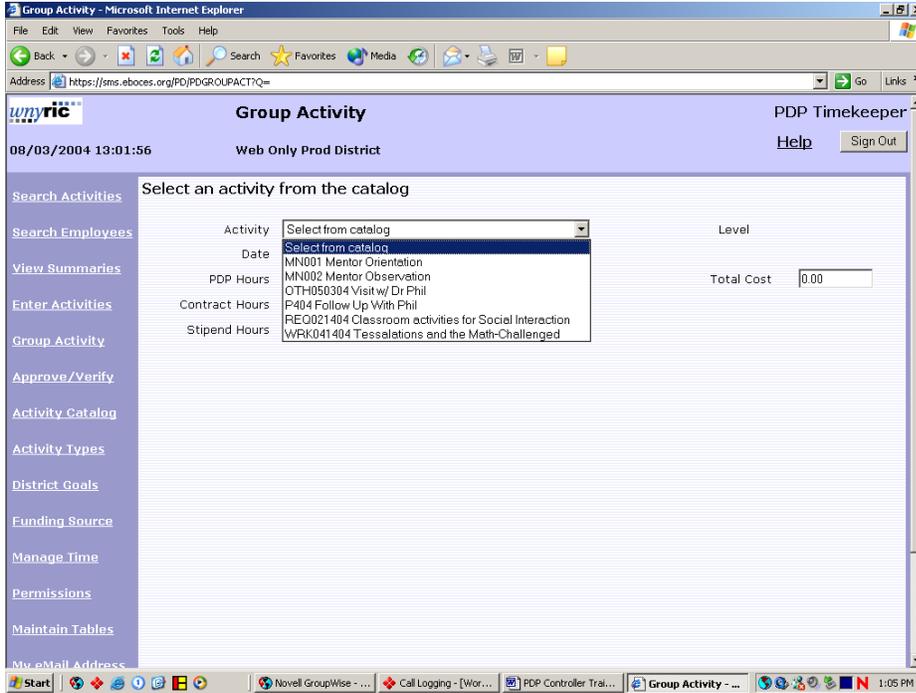
3. Either select activity from the Activity Catalogue or manually enter activity if not in the catalogue. **Note:** Fields marked with an asterisk are required. Then click the Submit button to enter the activity.

The screenshot shows the 'Enter Activities' web form. The browser title is 'Enter Activities - Microsoft Internet Explorer'. The address bar shows the URL: <https://sms.ebooces.org/PD/PDENTRY?ACT.TYPE.CODE=IS&K=9Fjw6Q=8fLz9YI29%2Fj5>. The form includes a search bar for employees with fields for SSN, Last Name, First Name, and MI, and a 'Find employee' button. Below this, employee information is displayed: Employee: TEACHER X. GUEST, Area: 7-12 teacher, Union: Teacher ass'n, Retirement Sys: TRS, Certif Subject: Math 7-9 Exten, and Certif Type: Provisional. A 'View Summary' link is provided. The main form area is titled 'Enter or change information in the following form.' and contains several fields: 'Type of Activity' (In Service), 'District Catalog #' (A1234), 'Title' (math works), 'Justification' (empty), 'Date' (08/14/2002), 'Goal' (improve math), 'Contract Hours' (0.00), 'Total Cost' (0.00), 'PDP Hours' (3), 'Funding Source' (empty), 'Stipend Hours' (3), and 'Substitute Needed' (checkbox). There are buttons for 'Submit Activity', 'Clear the Form', 'Delete Activity', and 'Reset'. A 'View Summary' link is also present. At the bottom, there is a section for 'Approvals:'.

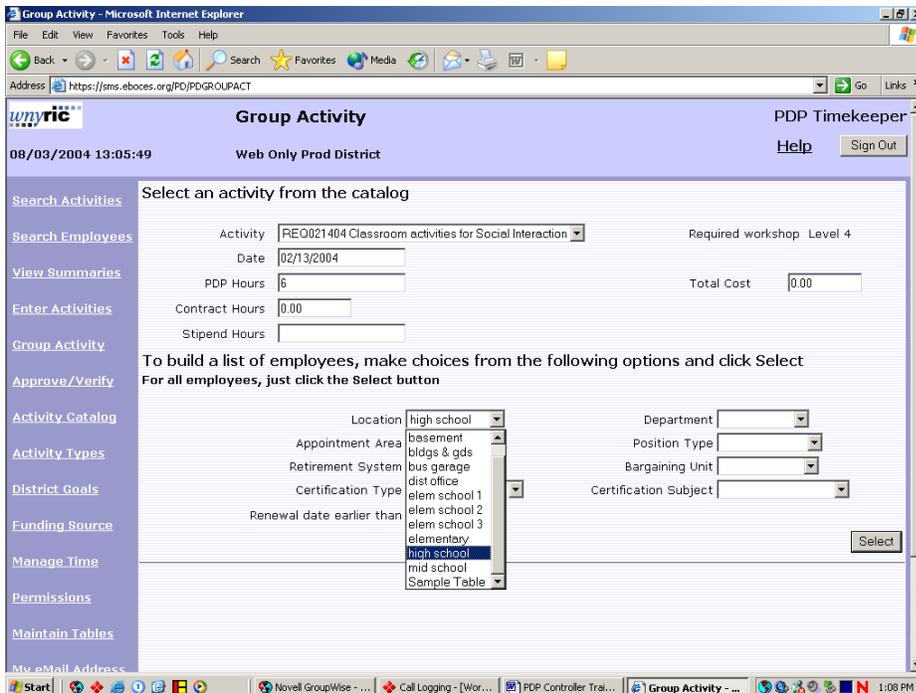
Group Activity

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

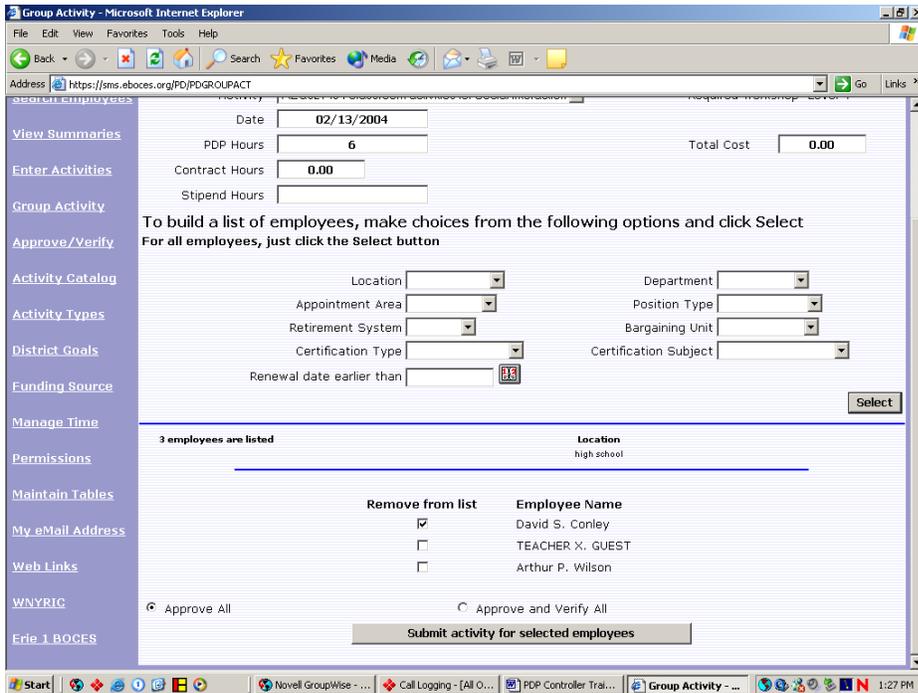
1. From any screen in PDP click on the Group Activity button.
2. From the Group Activity Screen select an activity from the Activity Catalog.



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.



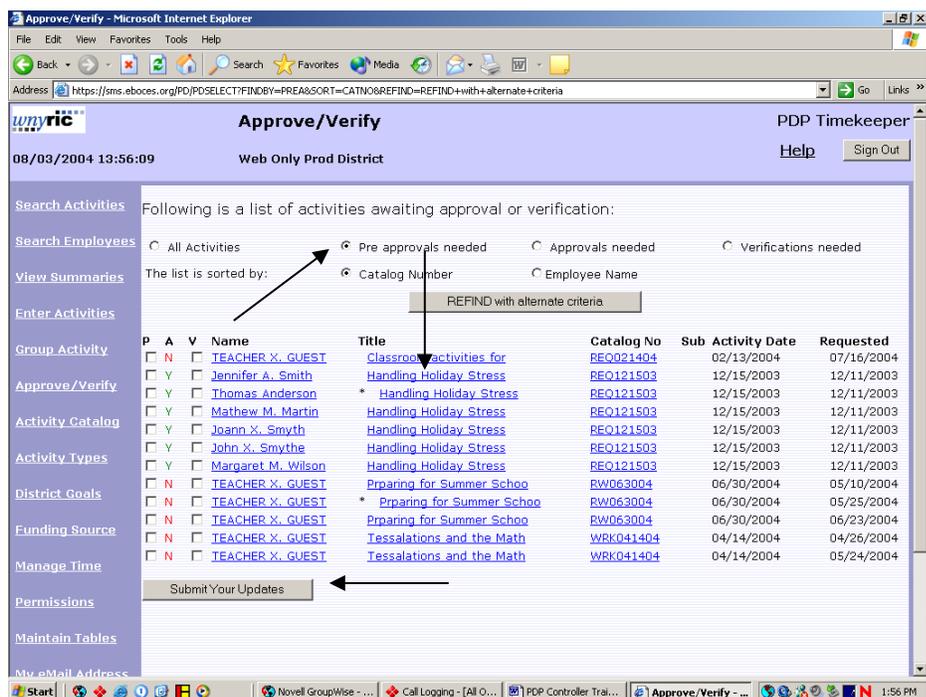
- Click in Remove From List check box to remove any employees from this activity, click in either approve or approve and verify (if this activity has already been completed) and click the Submit Activity For Selected Employees.



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 area]

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

Comment: [text area]

Verified Date: [text area] By: [text area] Grade: [text area]

Comment: [text area]

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

Denial Date: [text area] By: [text area]

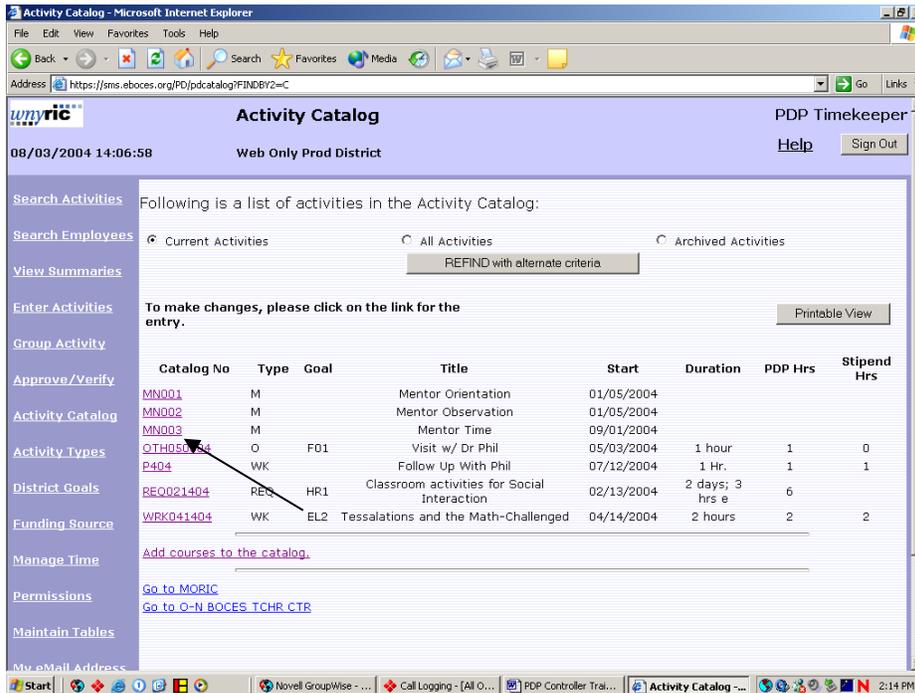
Comment: [text area]

Update Approvals

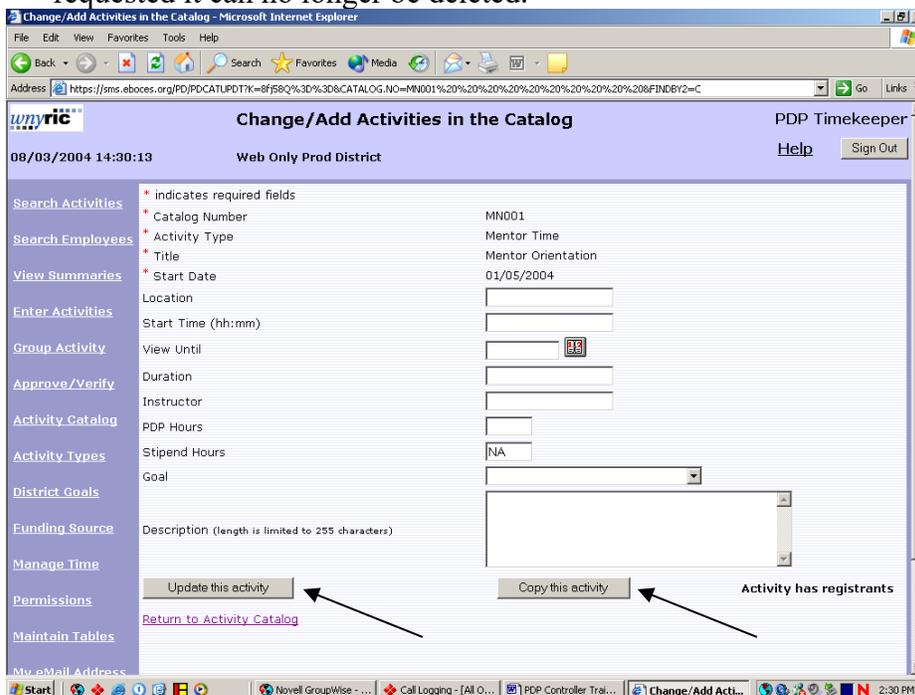
Activity Catalogue

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.

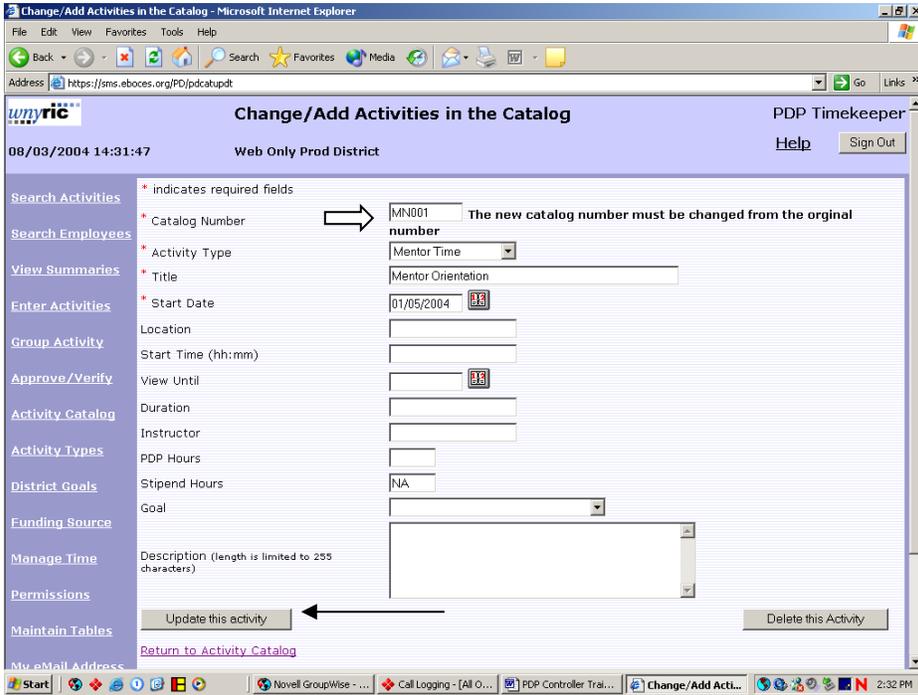
1. From any PDP screen click on the Activity Catalogue button.
2. To **update** an existing activity click on the link to the activity in the catalogue number column.



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.



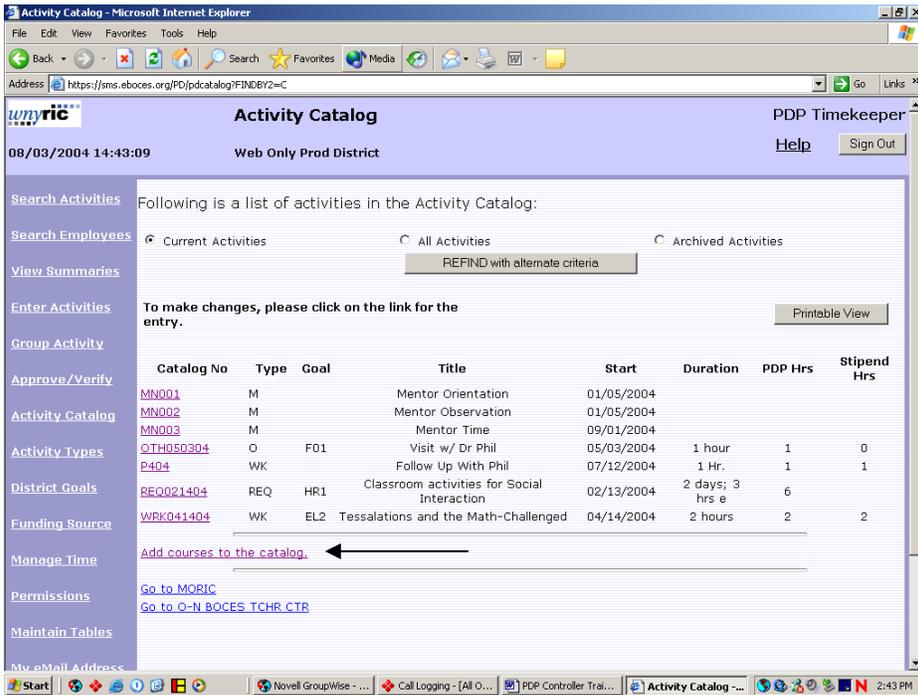
4. To copy an existing activity into a new activity click the Copy This Activity button.



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.

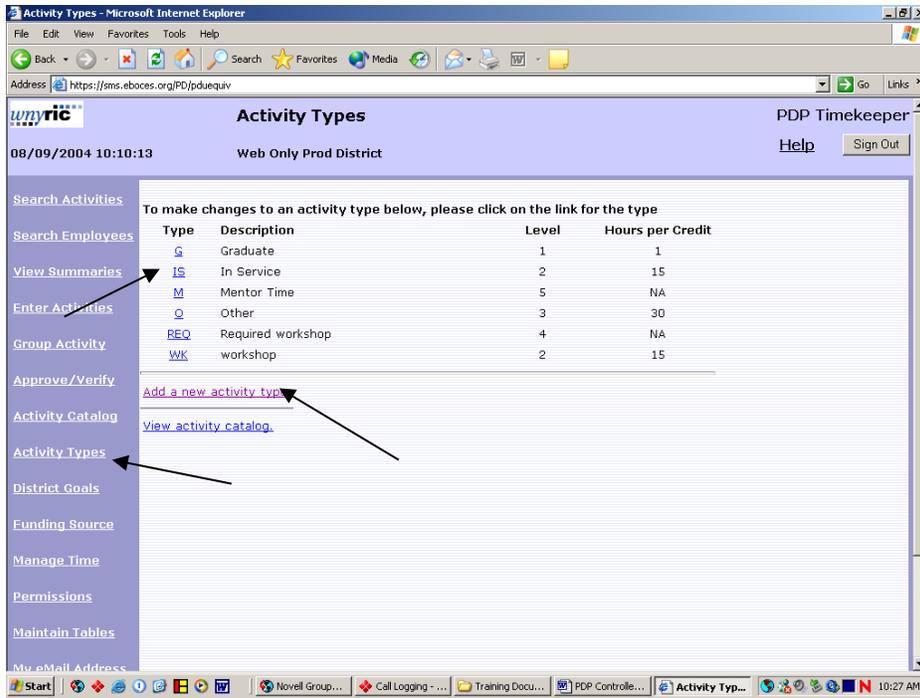
7. To add a new activity to the catalogue, click the Add Courses To The Catalogue link.



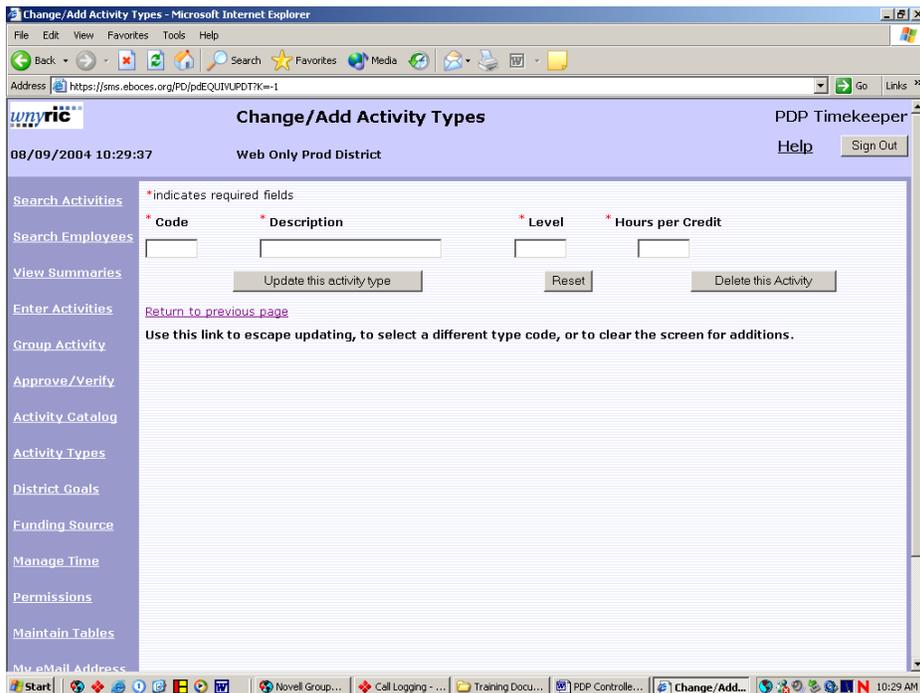
Activity Types

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.

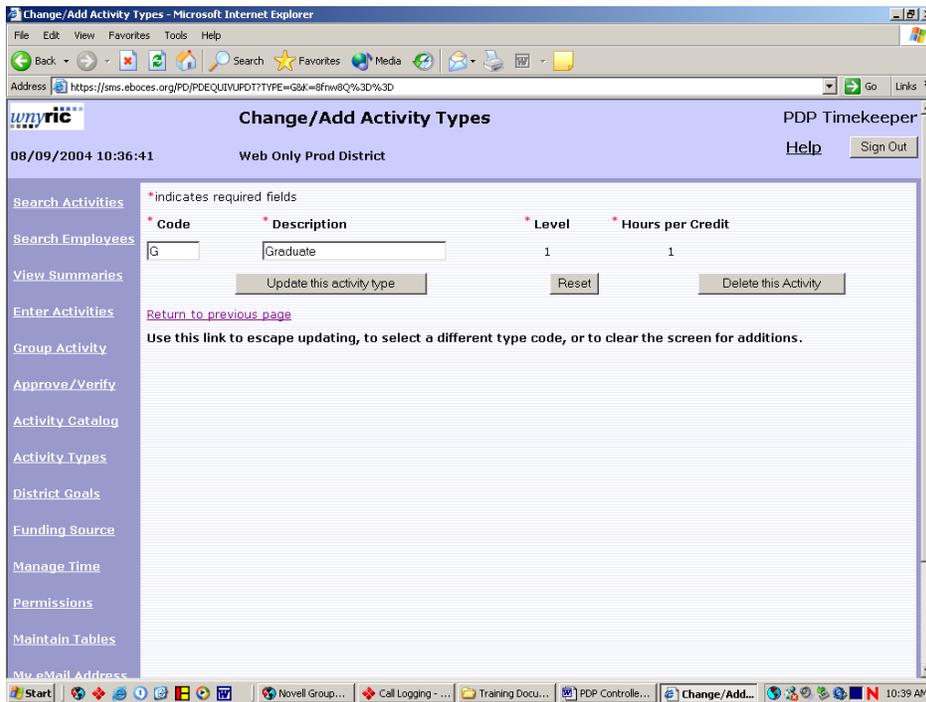
1. From any PDP screen click on the Activity Types button.



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



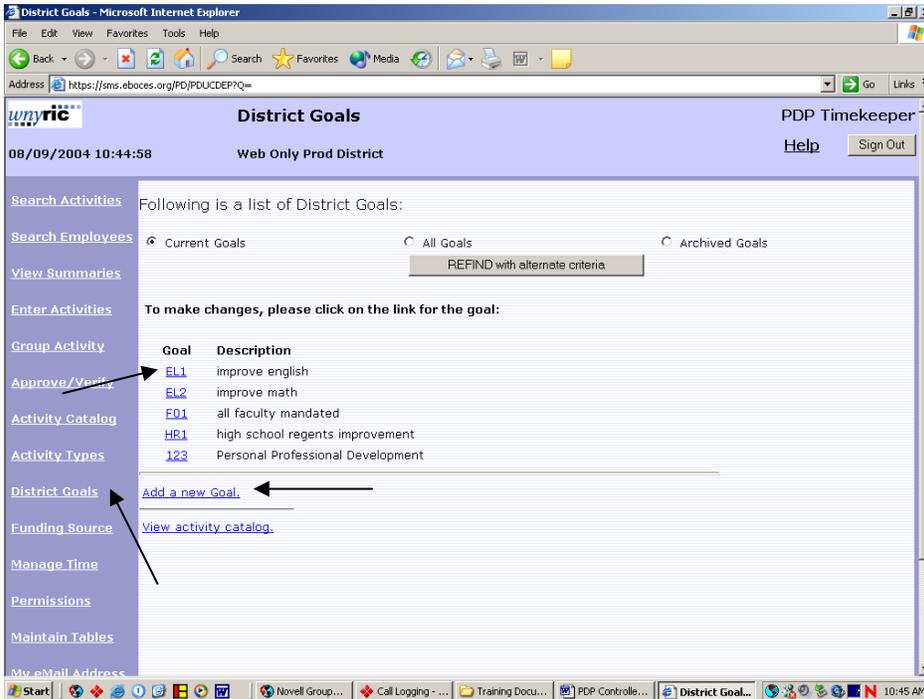
3. Fill in the 5 character code, a description, the level and hours per credit. Click the update this activity button.
4. To update an existing activity click on the activity code to be changed. The user may then change the code or the description only. Click the update this activity button.



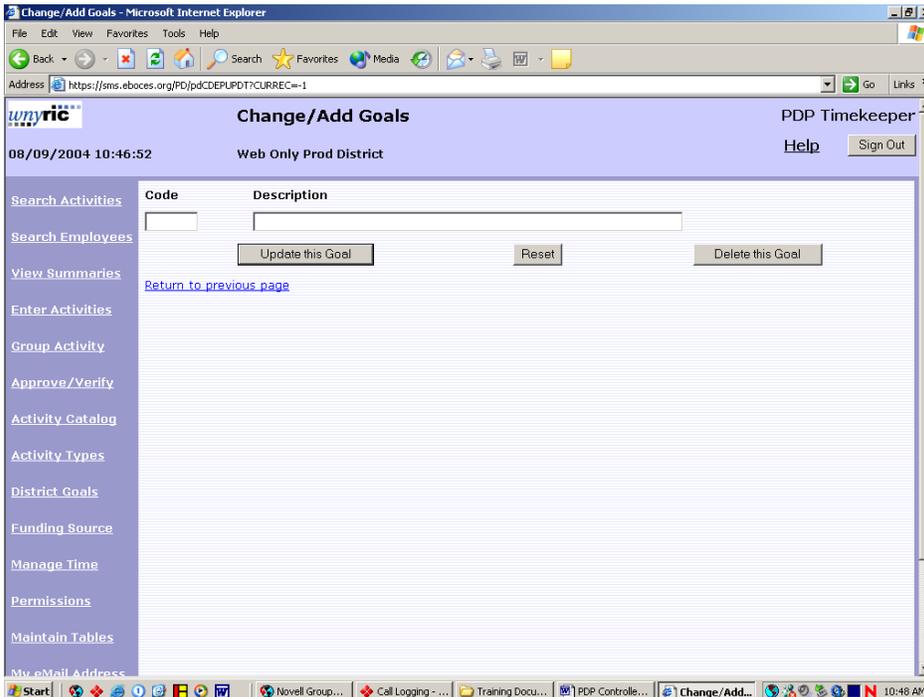
District Goals

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

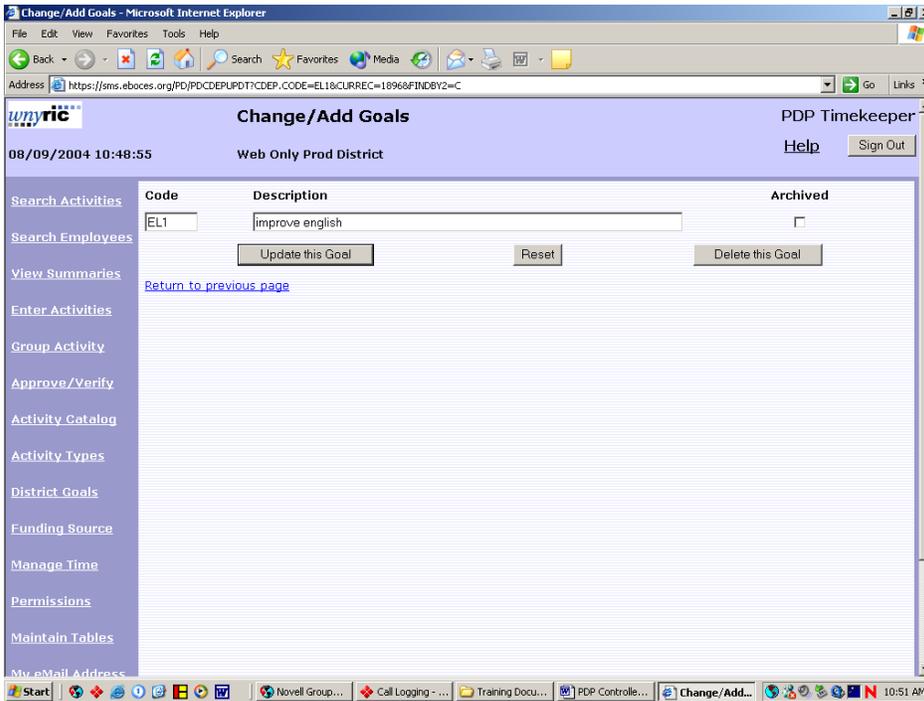
1. From any PDP screen click on the District Goals button.



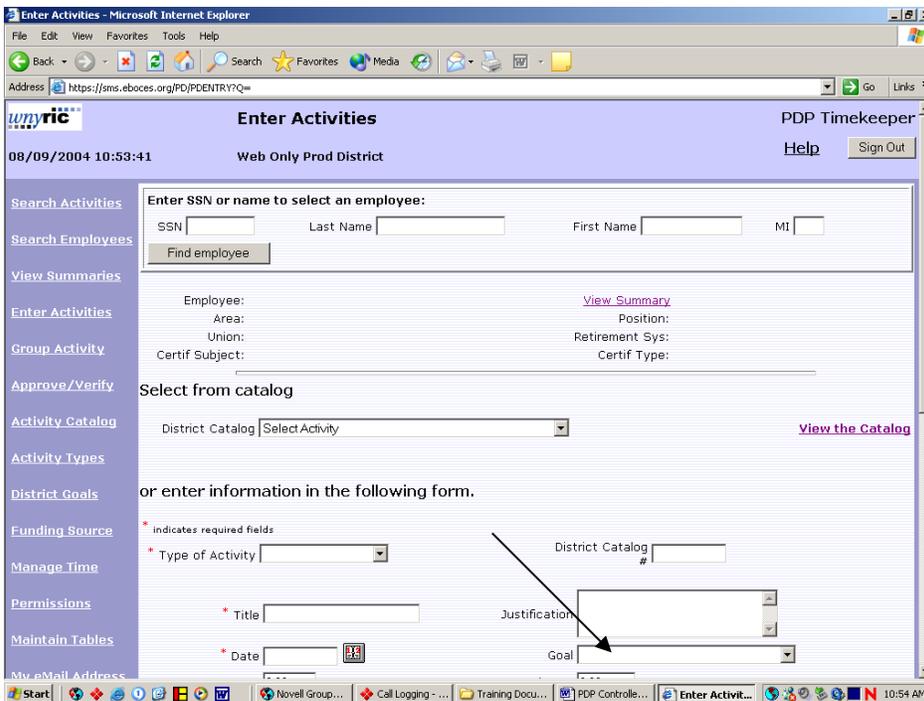
2. To add a new goal click on the add a new goal button. Fill in up to an 8 character code and a description and click on the update this goal button.



- 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.



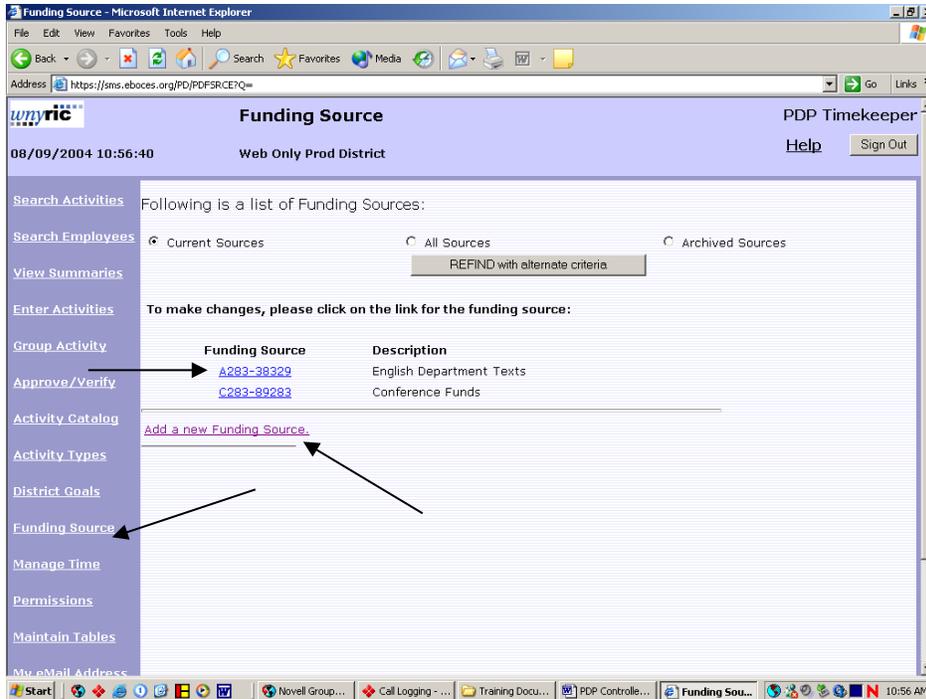
- Users may now add a District Goal to an individual activity by clicking on the Enter Activities button and selecting the goal in the Goals drop down list.



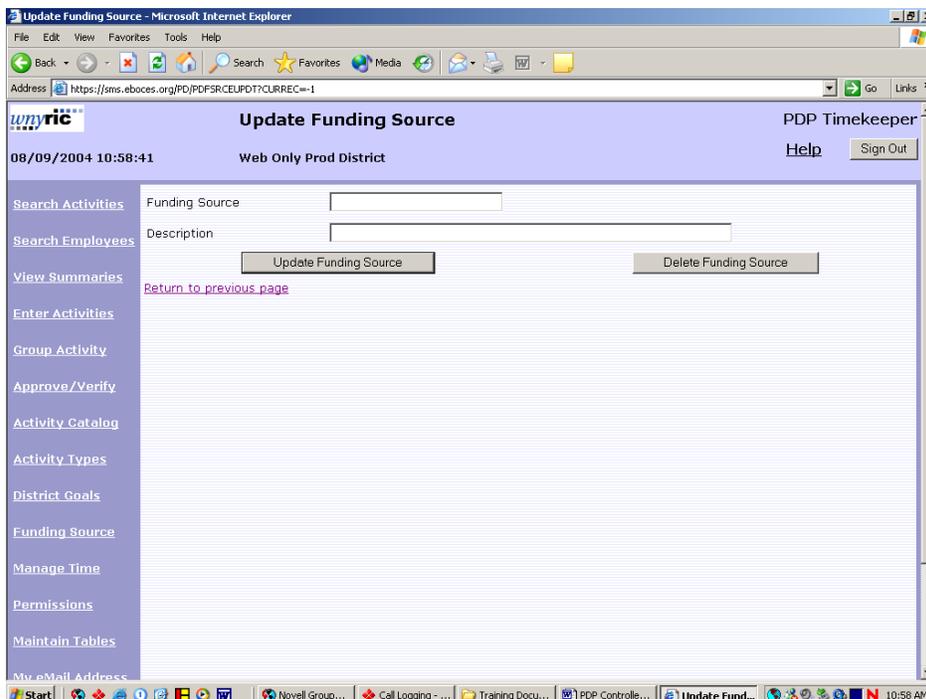
Funding Source

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

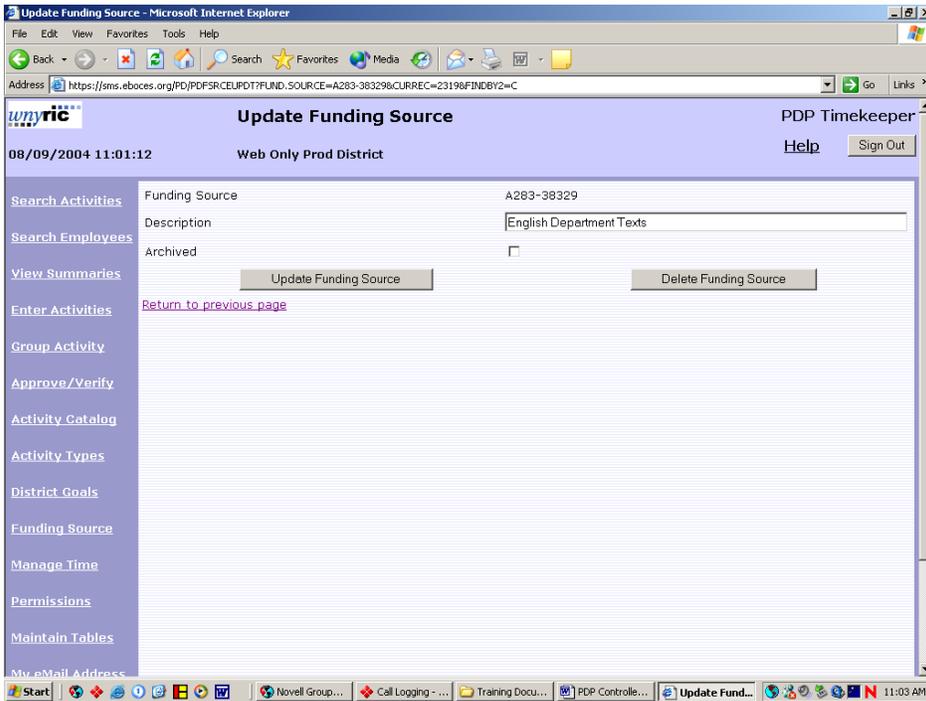
1. From any PDP screen click on the Funding Source button.



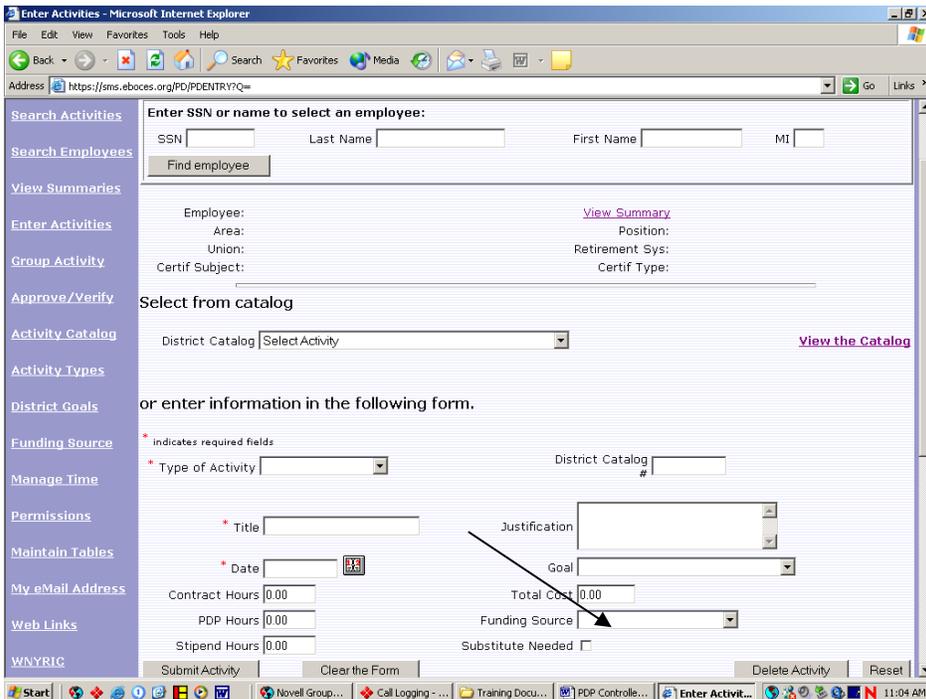
2. To add a new funding source, click the add a new funding source button. Fill in the funding source and description. Click the update funding source button.



- 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.



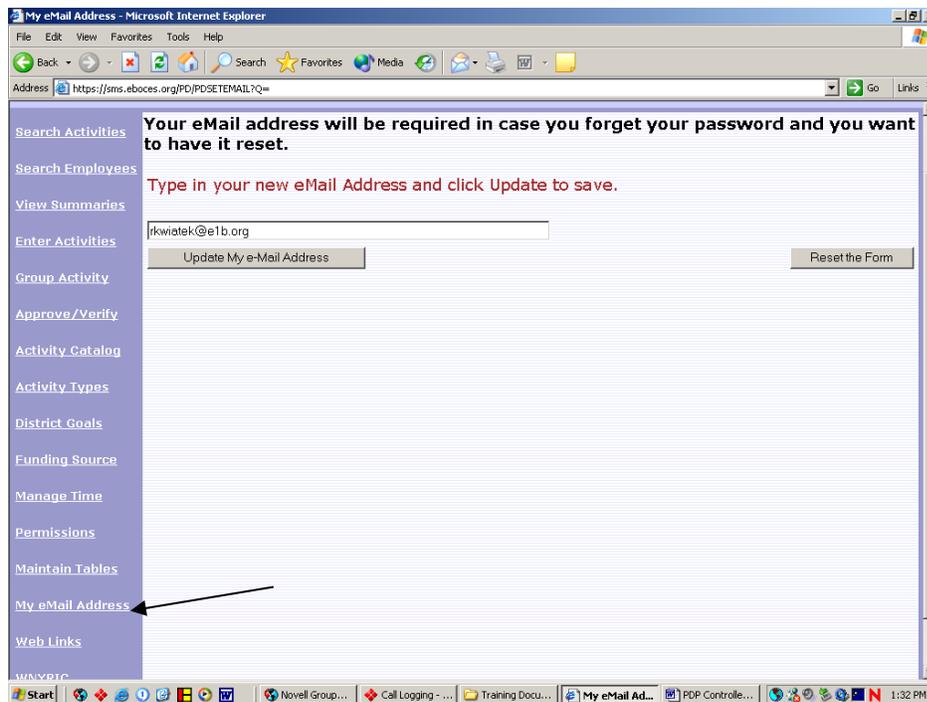
- Users may now add a Funding Source to an individual activity by clicking on the Enter Activities button and selecting the source in the Funding Source drop down list.



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.

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 Search Activities select by activity.
Activities by Status	A listing of all activities by a given current status.	In Search Activities select by status.
Activities by Type	A listing of activities by district defined categories.	In Search Activities select by activity type.
Activities by Goals	A listing of activities tied to a district defined goal.	In Search Activities select by goal.
Activities by Building	A listing of activities for a specified building.	In Search Activities select by building.
Activities by Funding Source	A listing of activities for a specified funding source.	In Search Activities 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.