

Bamboo Effort

- ▶ Certification

Supervisor Training

July 6, 2022 | CCE Tompkins HR

Please watch the Bamboo Effort Certification Staff Training first

- ▶ It contains basic information about Bamboo and Effort Certification that you'll need before watching this training.
- ▶ Find it at <http://ccetompkins.org/about-us/for-staff/effort-certification>



▶ Supervisor Responsibilities

All staff effort certification responsibilities

- ▶ All staff are responsible for entering their effort certification in Bamboo no later than the last day of their pay period.
 - ▶ Non-exempt hourly deadline: biweekly on Wednesday
 - ▶ Exempt salaried deadline: 15th & last day of each month.

Supervisor effort certification responsibilities

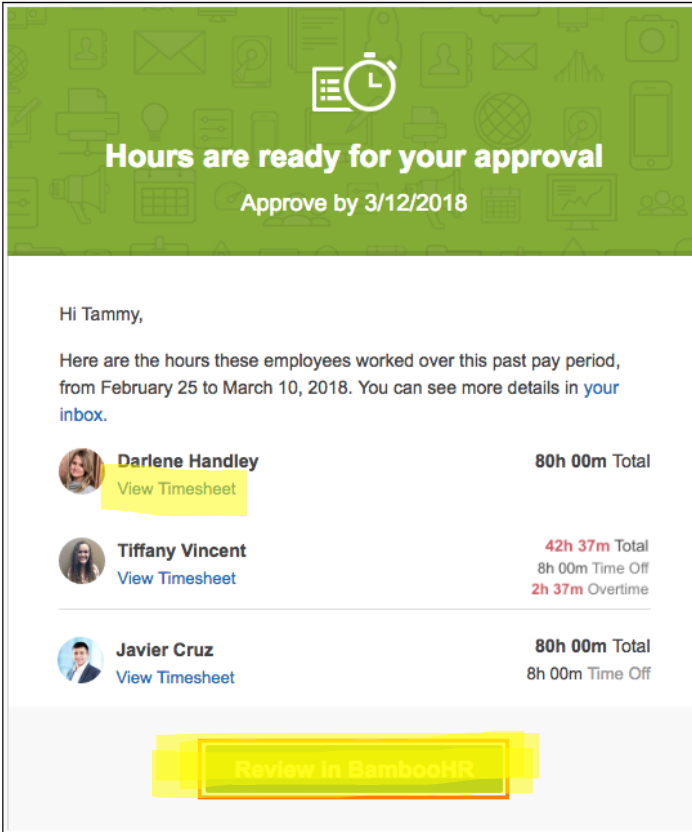
- ▶ Approve Bamboo time tracking for your direct reports no later than 5 days after end of pay period.
- ▶ Monitor effort certifications to keep staff time & budget on track.
- ▶ Make sure staff CPC codes stay up to date in Bamboo and Acumatica.
- ▶ Inform your staff of their CPC codes and time budget expectations.



▶ How to Approve

Where to find effort certifications

- ▶ You'll get an email from Bamboo when timesheets are ready for approval.






The screenshot shows an email notification with a green header. The header contains a clock icon and the text "Hours are ready for your approval" and "Approve by 3/12/2018". The main body of the email is white and contains a greeting "Hi Tammy," followed by a paragraph explaining that the hours for the past pay period (February 25 to March 10, 2018) are ready for review. Below this, there are three entries for employees: Darlene Handley (80h 00m Total), Tiffany Vincent (42h 37m Total, 8h 00m Time Off, 2h 37m Overtime), and Javier Cruz (80h 00m Total, 8h 00m Time Off). Each entry includes a "View Timesheet" link. At the bottom, there is a yellow button labeled "Review in BambooHR".

Hours are ready for your approval
Approve by 3/12/2018

Hi Tammy,

Here are the hours these employees worked over this past pay period, from February 25 to March 10, 2018. You can see more details in [your inbox](#).

 Darlene Handley View Timesheet	80h 00m Total
 Tiffany Vincent View Timesheet	42h 37m Total 8h 00m Time Off 2h 37m Overtime
 Javier Cruz View Timesheet	80h 00m Total 8h 00m Time Off

[Review in BambooHR](#)

Where to find effort certifications

- ▶ Or you can check your inbox within Bamboo for timesheet notifications.

The screenshot displays the BambooHR web interface. At the top, the navigation bar includes the logo and menu items: Home, My Info, People, Hiring, Reports, and Files. A search bar and user profile icons are on the right. The main content area is titled 'Requests' and features a sidebar with filters: 'Assigned to Me', 'Inbox (6)' (with sub-items: Approvals (4), Timesheets (2), Time Off Requests (2)), 'Signatures (1)', 'Peer Feedback (1)', 'Completed', and 'Sent'. The main list shows two notifications: 'Hours are ready for your approval. - Dec 26, 2019 Approval due Dec 29, 2019 at 8:00 AM (3 days)' and 'Hours are ready for your approval. - Nov 28, 2019 Approval due Dec 1, 2019 at 8:00 AM (past due)'. The 'Timesheets (2)' notification is highlighted with a yellow box. A dropdown menu is open from the top right, listing 'Inbox', 'Signatures (1)', 'Peer Feedback (1)', 'Time Off Requests (2)', 'Timesheets (2)', and 'Sent Requests'. The bottom right corner shows '1 - 2 of 2' and navigation links '« Prev | Next »'.

Where to find effort certifications

- ▶ Or you can check the employee profile. Type their name into the Bamboo search bar, then click the Timesheet tab in their profile.
- ▶ Use the dropdown in the right corner to choose pay periods.

The screenshot shows the BambooHR interface for an employee profile. The top navigation bar includes 'Home', 'My Info', 'People', 'Hiring', 'Reports', and 'Files'. A search bar is highlighted in yellow. The profile header for Jennifer (Jenn) Caldwell, VP of People, includes a 'Request a Change' button and a settings icon. The 'Timesheet' tab is selected in the sub-navigation. On the left, contact information and hire date (Jun 1, 2014) are shown. The main area displays a 'Timesheet' table with columns for days (Mon, Tue, Wed, Thu) and time slots. A 'Previous Pay Period' dropdown is highlighted in yellow, showing 'Dec 12 - 25' with a total of '16h 00m' and '8h Holiday'. A green 'Approve' button is highlighted with a red box, and a note indicates 'Must approve by Dec 29'.

Day	Time
Mon Dec 9	<input type="text"/>
Tue Dec 10	<input type="text"/>
Wed Dec 11	<input type="text"/>
Thu	<input type="text"/>

Previous Pay Period
Dec 12 - 25
16h 00m
8h Holiday
Approve
Must approve by Dec 29

Approving effort certifications

- ▶ Be sure to check that...
 - ▶ ...all your employees have submitted effort certifications.
 - ▶ ...timesheets are accurate.
 - ▶ ...all hours are assigned to a specific project.
 - ▶ ...there are no duplicated hours due to an employee entering time off into their timesheet.
 - ▶ ...non-exempt hourly employee timesheets match their Workday timesheets exactly.
- ▶ Once you're ready, click Approve!

Deadlines to remember

- ▶ You have 5 days after the pay period to work with your employee to make any necessary corrections.
- ▶ During this time, the employee can make the corrections directly in the timesheet.
- ▶ After 5 days and/or after you approve the timesheet, it will lock. After this point, you'll need to contact HR if any changes are necessary.

Finding help with approvals

- ▶ See Bamboo Help Guide:
<https://help.bamboohr.com/hc/en-us/articles/360006331414>
- ▶ You must be logged in to access this help guide.

The background features a complex geometric design. On the left, there are overlapping, semi-transparent shapes in various shades of green and a dark blue-grey. These shapes create a layered, abstract effect. The right side of the image is a solid, vibrant green. Centered on this green background is the text '▶ How to Monitor' in a clean, white, sans-serif font.

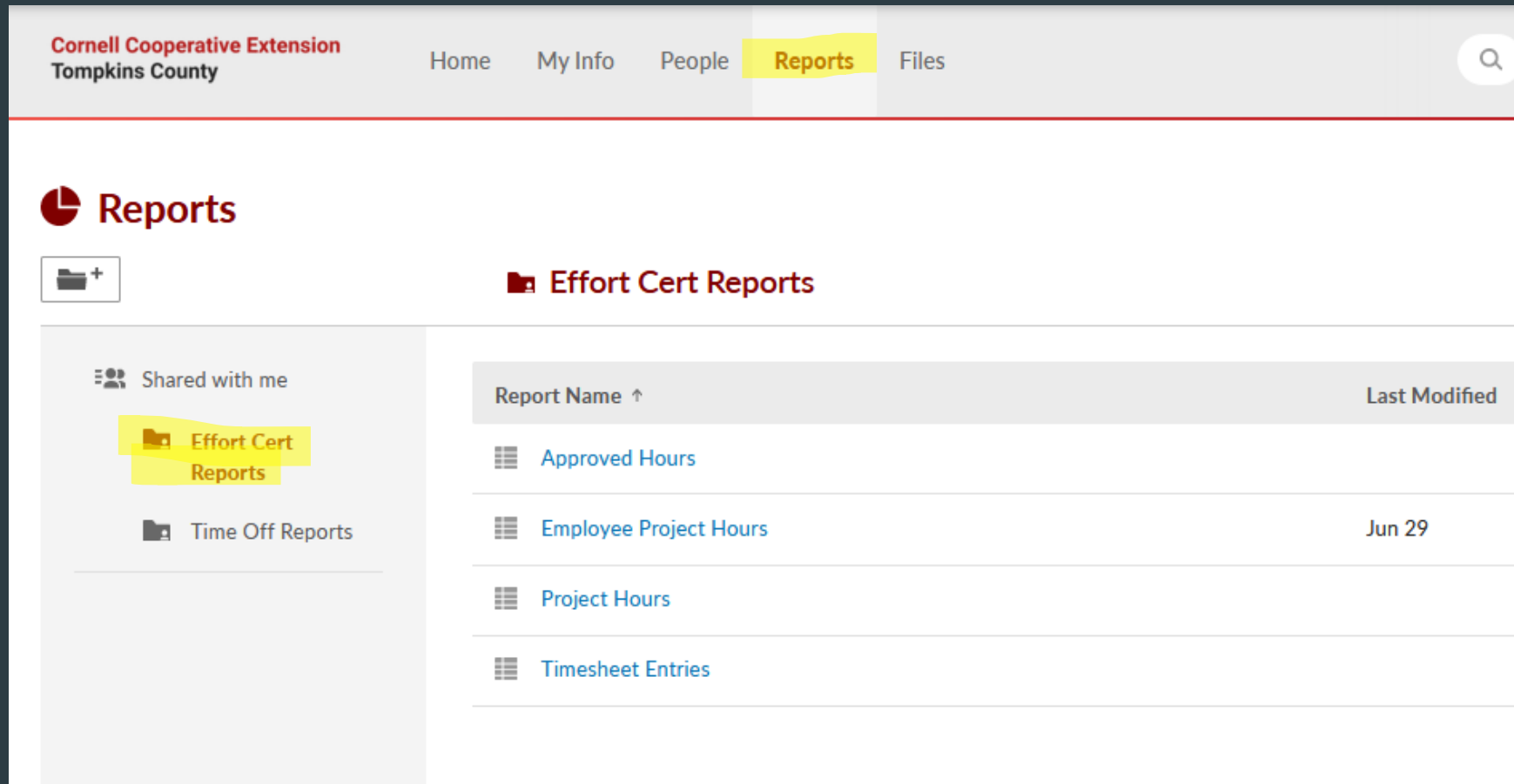
▶ How to Monitor

Why monitor effort certifications?

- ▶ This helps you keep staff time & budgets on track.
- ▶ It helps catch errors before they get into our accounting system or funder invoices.

Using Bamboo reports

- ▶ Go to the Reports tab and select the Effort Cert Reports folder.



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Home My Info People **Reports** Files

Reports

Effort Cert Reports

Shared with me

- Effort Cert Reports
- Time Off Reports

Report Name ↑	Last Modified
Approved Hours	
Employee Project Hours	Jun 29
Project Hours	
Timesheet Entries	

Effort Cert Reports

- ▶ Approved Hours - shows total approved hours per employee.
- ▶ Employee Project Hours - shows which projects an employee worked on.
- ▶ Project Hours - for each CPC, shows employee hours worked.
- ▶ Timesheet Entries - shows daily detail by employee

Reports only show employees in your reporting structure. To see other employees, contact HR or Finance.

Example: Employee Project Hours

- ▶ Select a date range and click Apply

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Home My Info People **Reports** Files

Employee Project Hours More ▾

06/01/2022 - 06/30/2022 All Employees **Apply** Reset Showing Active ▾

June 2022							July 2022						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4						1	2
5	6	7	8	9	10	11	3	4	5	6	7	8	9
12	13	14	15	16	17	18	10	11	12	13	14	15	16
19	20	21	22	23	24	25	17	18	19	20	21	22	23
26	27	28	29	30			24	25	26	27	28	29	30
							31						

billable or non-billable, all of it.

Example: Employee Project Hours

- ▶ You can also filter by dept, division, and other options.
- ▶ Click Apply to generate the report.

The screenshot shows the 'Employee Project Hours' report interface. At the top, the navigation bar includes 'Home', 'My Info', 'People', 'Reports', and 'Files'. The 'Reports' tab is active. Below the navigation bar, the page title 'Employee Project Hours' is displayed. The main content area features a date range selector set to '06/01/2022' to '06/30/2022'. A dropdown menu is open, showing filter options: 'All Employees' (highlighted in yellow), 'Department', 'Division' (highlighted in red), 'Employment Status', 'Job Title', and 'Location'. To the right of the dropdown is an 'Apply' button (highlighted in yellow) and a 'Reset' button. Further right, there is a 'Showing' dropdown set to 'Active'. A red arrow points to the 'Apply' button with the text 'Just enter a date range and click Apply. We'll show you the history of all the hours logged to date, all of it.'

Example: Employee Project Hours

- ▶ View the report in Bamboo or click More to download as Excel or CSV file.

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Home My Info People **Reports** Files

Employee Project Hours

06/01/2022 - 06/30/2022 Division (2) + Reset Showing

More ▾

Export Report as...
Excel
CSV

Employee Name	Billable Hours	Non-Billable Hours	Total
👤 Cassidy, Gina	162.50	7.50	170.00
▶ 10614 - Clean Energy Communities	162.50	7.50	170.00
👤 Coville, Robbie	110.50	13.50	124.00
▶ 11125 - NYSERDA Ag Energy	110.50	13.50	124.00
👤 Metz, Guillermo	162.50	1.50	164.00
▶ 11125 - NYSERDA Ag Energy	3.00	--	3.00
▶ 11155 - NYSEG - Non-Pipeline Alt Energy '22	--	0.50	0.50
▶ 10614 - Clean Energy Communities	5.50	--	5.50



▶ How to Update CPC Codes

How to Update CPC Codes

- ▶ Email HR (Tompkins-HR@cornell.edu) and Finance (Tompkins-Expenses@cornell.edu) to let them know when you need an employee's CPC code changed.
- ▶ Let HR and Finance know when a new CPC code is added or an old one is deactivated.



▶ How to Inform Your Employees

How to inform your staff about CPCs and effort certification

- ▶ Inform staff when they're hired and each time a CPC code or time budget changes.
 - ▶ Which CPC/project should they log hours for?
 - ▶ How many hours are they expected to log per pay period for the CPC/project?
 - ▶ When will this CPC/project be over?
- ▶ Consider using a standard template to share CPC information with your team. Talk to your Leadership Team representative about available templates.

If staff from another team is working on one of your projects....

- ▶ ...make sure that staff member and their supervisor are informed.
- ▶ ...work with that staff member's supervisor to monitor their time and budget for your project.

Frequently Asked Supervisor Questions

- ▶ How is time off billed?
 - ▶ As of July 2022, the default method used by Finance is to divide it proportionally based on time worked in that pay period.
 - ▶ If your staff need something different, get in touch with Finance.
- ▶ How are retroactive time and retroactive raises billed?
 - ▶ Retro time entry and raises can cause major problems, because Finance can't always go back to correct the books or funder invoices. Strive to submit hours and raises on time to prevent problems.
 - ▶ As of July 2022, the default method used by Finance is to divide it proportionally based on the time worked in the pay period that the payroll bill was received.
 - ▶ If you have questions, reach out to Finance.



▶ Next tasks for you

Tasks for supervisors

- ▶ Enter your personal Effort Certification hours.
- ▶ Review and approve timesheets for your staff.
- ▶ Monitor effort certifications proactively.
- ▶ Contact HR and Finance to keep CPC codes up to date.
- ▶ Inform your staff about CPC expectations.



▶ How to get help

How can I get help?

- ▶ First, try the Bamboo Help Center. Log into Bamboo and click the question mark icon in the top right corner. From here, you can search for help guides on any topic.

The screenshot displays the BambooHR user interface for Amina Omari, Human Resources Manager. The top navigation bar includes 'Home', 'My Info', 'People', 'Hiring', 'Reports', and 'Files'. A search bar is located in the top right corner. A question mark icon in the top right corner is highlighted with a yellow circle, and a dropdown menu is open, showing search results for 'add hours to my timesheet'. The dropdown menu includes options like 'Add Hours to My Timesheet', 'Time Tracking Widget', 'Chat with Us Now', 'Submit a Support Request', 'BambooHR Help Center', 'BambooHR Learning Courses', and 'Product Updates'. The main content area shows the 'Timesheet' tab with a calendar view for June 30 and July 1, both showing 8h 00m.

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Home **My Info** People Hiring Reports Files

Search...

14 ?

How can we help you?

Q add hours to my timesheet

Add Hours to My Timesheet
How do I add hours to my timesheet?
Purpose: You can add hours on Home or the Timesheet tab

Add Hours to My Timesheet
How do I add hours to my timesheet?
Purpose: You can add hours on Home or the Timesheet tab

Time Tracking Widget
and pay period. Additionally, clicking My

Chat with Us Now

Submit a Support Request

? BambooHR Help Center

BambooHR Learning Courses

Product Updates

Personal Job Time Off **Timesheet** Assets

Amina Omari
Human Resources Manager

ao33@cornell.edu

Hire Date
Dec 1, 2018
3y - 7m - 5d

1044957-ao33
Regular
Leadership Team
Exempt

Timesheet

Jul 1-15

Thu Jun 30	8h 00m
Fri Jul 1	8h 00m

How can I get help?

- ▶ Second, try asking your supervisor and/or Leadership Team representative.
- ▶ Third, visit HR office hours. You can find the link to HR office hours on <http://ccetompkins.org/about-us/for-staff>
- ▶ Finally, you can email Tompkins-HR@cornell.edu or Tompkins-Expenses@cornell.edu with any questions that you can't solve with the help center, your supervisor, or office hours.

I hope Bamboo makes your
work life easier!

Please email Tompkins-HR@cornell.edu with your feedback.

Thank you!