# KPME Time
# And Attendance
# User Guide 1.0

September 2011

**The Kuali Foundation**

Revision History

| Version | Date | Chapter | Description |
|---|---|---|---|
| **1.0** | **Sept. 2011** | | **Version 1.0** |

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# Introduction to KPME Time and Attendance

## What is KPME Time?

KPME Time provides a 24/7 electronic timekeeping system to record hours worked, hours in pay status, and absent Time in an easy-to-use, always accessible, web-based interface. It handles multiple jobs, pay types, and pay cycles based on employees active appointments in your department. It also calculates all special rates of pay such as overtime, shift differential, premium, and holiday pay.

In addition, the system provides approval routing based on jobs so your designated approvers can view and approve employee timesheets online.

## Why is it used?

The primary purposes of the timekeeping system are:

- Elimination of paper-based, departmental, or outsourced systems
- Provide for appropriate approval routing based on jobs and labor distribution
- Provide for consistent application of an department's policy as well as state and federal labor laws
- Provide for easy auditing of records and reports

Timekeeping data can also be used to generate relevant reports that are useful for tasks such as labor budgeting.

## Who uses it?

- **Employees** use the system to record the hours they work. The system supports hourly and flat-rate employees which allow it to handle uncommon pay conditions. Employees also use KPME Time to record leave balance usage such as days off when sick or on vacation.
- **Approvers** use KPME Time to review, modify, and approve the hours their employees have recorded. They can also view the rules (lunch deduction, shift rules, etc.) set up for their department.
- **Reviewers** are KPME Time users who have the same 'view and edit' timesheet options as Approvers but are unable to approve timesheets.
- **Department Administrators** are able to access the administrative functions in KPME Time allowing them to create Work Areas, add approvers for approval routing, and change the rules in their department.
- **System Managers** are able to access all timesheets, administrative and system functions and provide support to answer questions or assist users.
- **View Only** users are granted access to view, but not modify, timesheets for a given department.

## When is it used?

KPME Time is available 24 hours, 7 days a week, and 365 days a year for employees to record hours worked and for approvers to process timesheet approvals.

## How does it work?

KPME Time is a web-based application and can be accessed from any network-connected device with a web browser. Employees will log into the KPME Time central portal which provides access to timesheets for either clock entry or manual entry of hours worked.

A department must first create **Work Areas** in KPME Time to control the Approval Routing of the timesheet and to set up **Assignments** that the employee uses to record work hours. KPME Time also allows for further definition of Work Areas called Tasks. Tasks are optional sub-divisions of Work Areas and allow departments to keep track of the hours an employee works on a particular project.

### Work Area Example:

| |
|---|
| Organization: DP-BOOK |
| Work Area: Cashier |
| Approver:<br>John Doe |
| **Employees:**<br>Daniel Smith<br>Ramona Sinclair |

| |
|---|
| Organization: DP-BOOK |
| **Work Area:** Warehouse |
| Approver:<br>Sally Farnsworth |
| **Employees:**<br>Ray Johnson<br>Daniel Smith |

The above example shows one Organization with two different Work Areas in KPME Time. Notice that one employee (Daniel Smith) works in both Work Areas. When employees are associated with a KPME Time Work Area it appears as an "Assignment" on their timesheet.

Employees can have many different Assignments and can even have multiple Assignments associated with the same job. Employees either clock in/out or manually edit the timesheet to record hours worked in their various Assignments. Employees can also enter the leave hours they take during that pay period, such as sick or vacation.

At the end of each pay period, the timesheet is submitted by the Employee to an Approver and the Employee can access it up until it is approved. Each Approver must then review and approve all hours worked for their specific Work Area, along with any leave hours taken. Once the Approver has reviewed and approved all of the hours, the timesheet is Final and can only be changed at that point by the System Administrator.

In the example above, Daniel's timesheet will route to both John (Work Area: Cashier) and Sally (Work Area: Warehouse) for approval of hours worked in their work area. John will be able to see Warehouse hours on Daniel's timesheet but he is not able to add/modify/delete those hours because he does not have a KPME Time role in that Work Area. The same is true for Sally.

After all approvals are recorded, the hours for that employee can be are transferred to your institution’s payroll system.

## Recommended System Specifications

Note: These configurations are current as of the publication of this User Manual.

### Desktop Devices

Workstations must run Windows 7, XP or Vista with Internet Explorer version 5.5 Service Pack 2 or newer.

KPME Time may function with other operating systems and browsers such as Mozilla Firefox, but customer support is not provided for these other configurations.

# Logging in to KPME Time

To access the system, you will log in via a central portal, with your username and passphrase.

In KPME Time you are assigned a user role that determines which system tabs you will see after you log in.

The illustration below demonstrates all of the navigational tabs that are available in the system. An Employee will see tabs, depending on their assignment, to clock in or navigate to other pages in the timesheet to add hours, or to verify benefit leave hours. An Approver will see a tab that allows them to approve timesheets. An Administrator will see tabs related to department or system administrative functions.


The next section describes each of the user roles, from Employee to System Manager, and explains what each role can see and do using the system tabs.

# KPME Time User Roles

Below is a description of each User Role and the tabs that are visible once that user logs into the system.

**Employee** tabs include:
- **Clock:** Clock Entry employees use this tab to clock in and out.
- **Time Detail:** All employees (with a valid Time Assignment) can see this tab. Clock entry employees use this tab to review their daily, weekly or total hours for the pay period and to add benefit leave time blocks. Manual Entry employees use this tab to add all of their work hours and benefit leave time blocks.
- **Leave Accrual:** Employees can use this tab to verify an employee's leave balances and ensure their usage is correct.
- **Person Info**: Available to all users. Displays job, assignment and role information for each of the employee's job records.
- **Help**: Displays information to help employees, approvers and reviewers use the system.

**View-Only** tabs include:
- **Time Detail:** View-Only users use this tab to view timesheets but do not have any editing capabilities.
- **Admin:** View-Only users are only allowed to "view" the rules for their department.

**Approver** tabs include:
- **Clock:** Approvers can use this tab to clock an employee out if they missed their last clock out.
- **Time Detail:** Approvers can use this tab to enter time block adjustments to an employee's timesheet.
- **Leave Accrual:** Approvers and administrators can use this tab to verify an employee's leave balances and ensure their usage is correct.
- **Approval:** Approvers use this tab to review and approve all timesheets for their employees.
- **Admin:** Approvers are only allowed to "view" the rules or maintenance pages for their department.
- **Person Info**: Available to all users. Displays job, assignment and role information for each of the employee's job records.
- **Help:** Displays information to help employees, approvers and reviewers use the system.

**Reviewer** tabs include:
- **Clock:** Reviewers can use this tab to clock an employee out if they missed their last clock out.
- **Time Detail:** Reviewers can use this tab to enter time block adjustments to an employee's timesheet.
- **Leave Accrual:** Reviewers can use this tab to verify an employee's leave balances and ensure their usage is correct.
- **Person Info**: Available to all users. Displays job, assignment and role information for each of the employee's job records.
- **Help**: Displays information to help employees, approvers and reviewers use the system.

**Department Administrator** tabs include:
- **Clock:** Administrators can use this tab to clock an employee out if they missed their last clock out.
- **Time Detail:** Administrators can use this tab to enter time block adjustments to an employee's timesheet.

- **Leave Accrual:** Administrators can use this tab to verify an employee's leave balances and ensure their usage is correct.
- **Admin:** They have edit mode for only the department-level maintenance and rules pages so they can define attributes associated with employees, work areas, and departments.
- **Person Info**: Available to all users. Displays job, assignment and role information for each of the employee's job records.
- **Help**: Displays information to help employees, approvers and reviewers use the system.

**System Manager** tabs include:

- **Clock:** Administrators can use this tab to clock an employee out if they missed their last clock out.
- **Time Detail:** Administrators can use this tab to enter time block adjustments to an employee's timesheet.
- **Leave Accrual:** Administrators can use this tab to verify an employee's leave balances and ensure their usage is correct.
- **Admin:** They can access all the system maintenance and rules pages and define attributes associated with employees, work areas, departments and system-level settings.
- **Batch Job:** Administrators use this tab to run various batch jobs and system reports.
- **Person Info**: Available to all users. Displays job, assignment and role information for each of the employee's job records.
- **Help**: Displays information to help employees, approvers and reviewers use the system.

If you have more than one role in KPME Time you will see all the appropriate tabs for each role.

# Employee Options

This section provides a description of the timesheet used in KPME Time, including the navigational options. In addition, it describes the two methods used to record work or leave hours, and explains how to use the timesheet to record hours, distribute work hours and report missed clock punches.

## Timesheets

Every employee in KPME Time has one timesheet for each pay period. Pay periods can be set up to fit departmental needs, such as weekly, biweekly, or bimonthly. Each FSLA (Fair Labor Standards Act) period meets the standard for overtime hours, overtime pay and collected unpaid overtime. Each timesheet represents a document in the Kuali Rice/Workflow system—a routing and approval engine used to manage who can view and take actions on a particular timesheet.

### Timesheet Creation

Employees with active KPME Time assignments during the pay period will have timesheets created automatically the Friday before the next pay period begins, or when the batch job is scheduled. The batch job can be run nightly.

If an employee is missing a timesheet, one may need to be created by the System Manager who can use the timesheet Create maintenance document to do so. Please contact your Department Administrator or System Manager and include the employee's Principal ID number in the request.

### Clock Entry vs. Manual Entry

There are two methods an employee may use to record regular hours:

1. **Clock Entry** is used when capturing exact in and out times. After logging in, the timesheet opens on the **Clock Tab**. This tab includes a clock section with a dropdown list of active Clock Assignments, and one selects the appropriate assignment to clock in or out. Clock buttons that may be visible here include Clock In or Clock Out**,** Missed Punch and Distribute Time Blocks.

   Only assignments where you must clock in and out will show up in the Clock Assignment dropdown. If you also have Manual Entry assignments you will need to click on the **Time Detail** tab to manually enter those work hours (see Manual Entry below).

2. **Manual Entry** is used when clocking is not required, and the hours worked are recorded by entering blocks of time manually into the timesheet. After logging in, the timesheet opens on the **Time Detail** tab.

Manual Entry assignments do not appear on the Clock Tab. If your only time assignment is a Manual Entry assignment, you will not see the Clock Tab on your timesheet.

## Timesheet Overview and Navigation

Let's look at a sample timesheet.

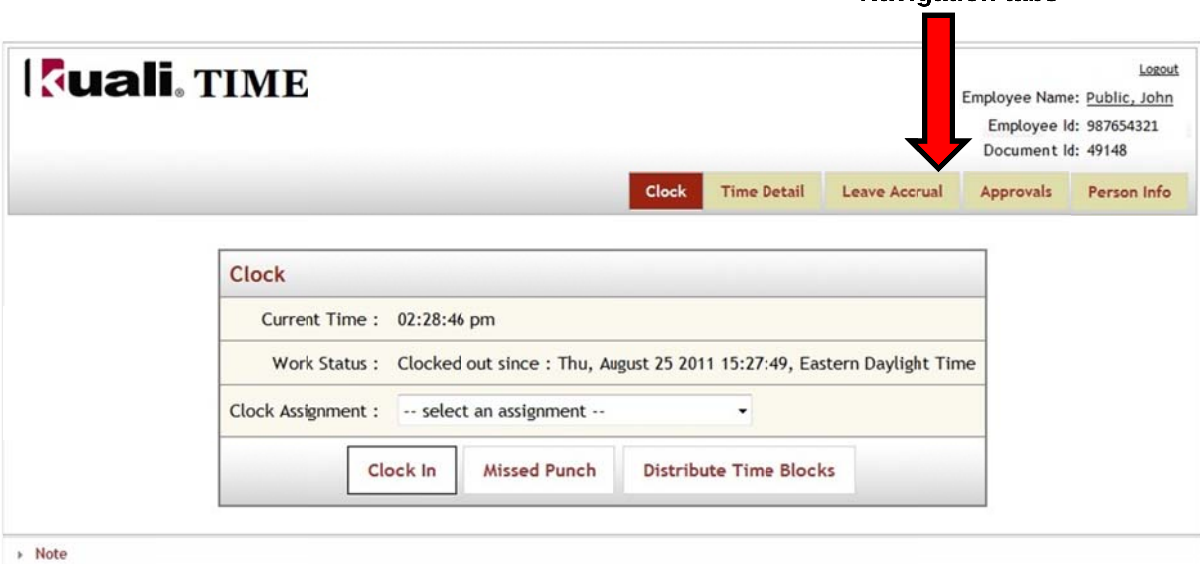
If you are an employee with a **Clock Entry** assignment, your timesheet will open on the *Clock* tab so you can easily clock in and out.

You can also see and access the *Time Detail* tab, *Leave Accrual* tab, and *Person Info* tab.

If you are an employee who also approves timesheets, you will see the *Approvals* tab.

To move to the any other tab on the timesheet, just click on that tab.

**Navigation tabs**




All timesheets display a Document Header in the top right corner that includes basic information, such as your Employee Name, Employee Id, and the Document Id number of your timesheet.

This area also includes a **Logout** link that you will use to log out of the system and close your timesheet.

If you click on your Employee Name, that will open the *Person Info* tab, so you can view details about your assignments, jobs, and roles. Or you can click on the *Person Info* tab to open the same page.

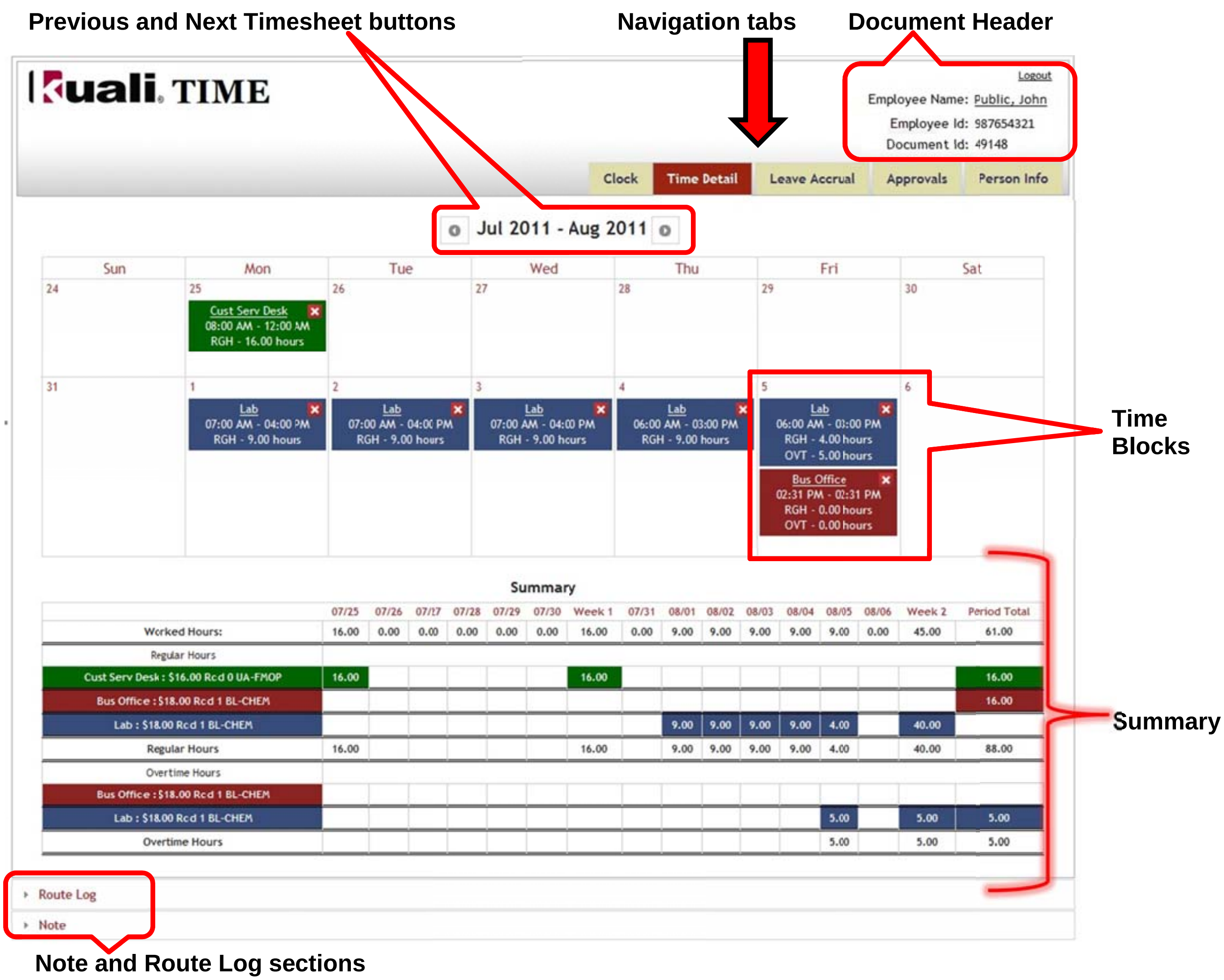

If you click on the *Leave Accrual* tab, you can see the vacation, sick or other leave hours available for your use.

The *Time Detail* tab opens a calendar view of the pay period covered by the timesheet, and allows you to review the Time blocks you have clocked on the timesheet and to enter any leave hours, such as sick and vacation, that you took during the pay period.

If all you have is a **Manual Entry** assignment, your timesheet will open on this tab, so you can manually add the Time blocks you are working or taking as leave.

The calendar format of the *Time Detail* tab shows the length of your pay period and it will gray-out any days not included in that period. It also displays all the Time blocks you have clocked, or manually entered, including any leave Time blocks.  It you work more than one Time assignment; they are color coded, so you can see the Time blocks and hours that you have accumulated under each assignment.

There are **Previous** and **Next** arrow buttons located next to the calendar date that allow you to view your previous and next timesheet as available.



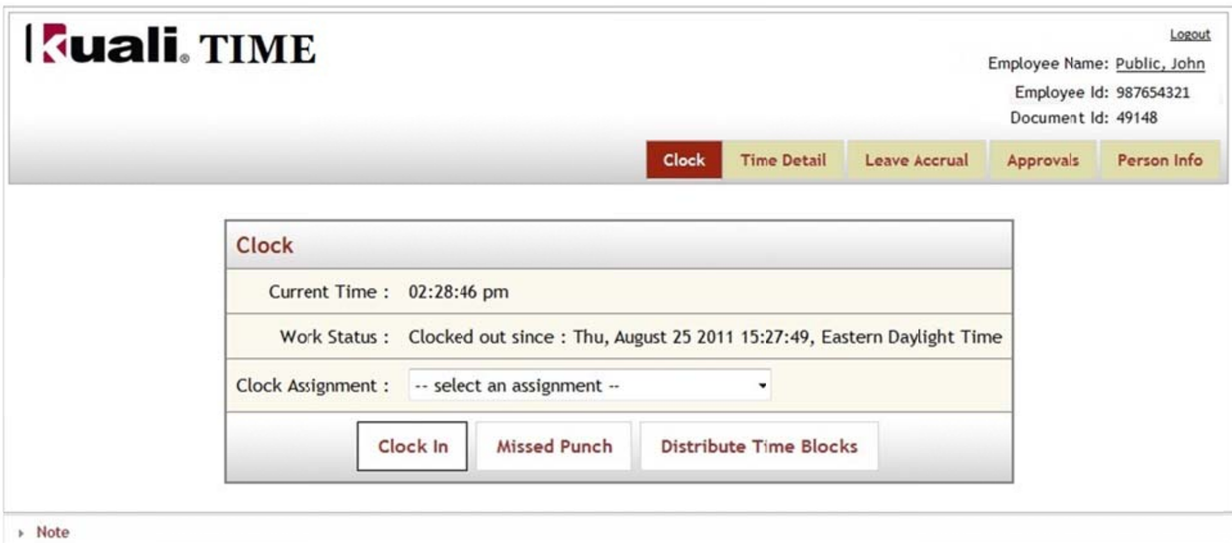

Below the calendar is a **Summary** section that shows the total Worked Hours for each day along with a breakdown of the hours worked by assignment, day  and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a Weekly and Period Total.

An Earn Code is a classification of earning that represents the hours worked or some special earning like shift Time, sick Time or overtime.  An Assignment is a unique combination of your Job, Job Number, Work Area (and Task), and is used to record the hours that you work.

The bottom of the timesheet on both the *Clock* and *Time Detail* tab contains a **Note** section, which allows you, your approvers and administrators to add and save notes on the timesheet. The *Time Detail* tab also includes a **Route Log** section that allows you to view the approval routing for your timesheet.

# Clock Entry Timekeeping

**Clock Entry** employees use the *Clock* tab to clock in and out. When you login to KPME Time, your timesheet will open on this tab.




Let's review the fields and buttons available on this tab:

The "<u>Current Time</u>" field shows you the current clock Time.

The "<u>Work Status</u>" field shows you the last clock action you recorded on your timesheet. It shows your last action (clocked in/clocked out), and the date and Time of that action.

A Time **Assignment** is a unique combination of your Job, Job Number, Work Area (and Task), and is used to record the hours that you work.

The "<u>Clock Assignment</u>" field will show you a list of your current assignments so you can select the specific **Assignment** you are going to clock in on. If you only have one assignment, or are already clocked in there won't be an assignment dropdown.

The **Clock In** and **Clock out** buttons allow you to clock in or out.

The **Missed Punch** button allows you to submit a missed punch, if you forgot to clock in or clock out.

The **Distribute Time Blocks** button allows you to clock in and out of a single assignment and then distribute hours at the end of the day to multiple assignments.

The **Note** section allows you to add a Note on your timesheet.

## Clocking In and Out

To clock in:

1. Log into KPME Time. (Timesheet opens on the *Clock* tab.)
2. In the <u>Clock Assignment</u> field, select an Assignment. (If you only have one assignment, it will already be selected.)
3. Click on **Clock In** button. (Work Status will show you are clocked in.)

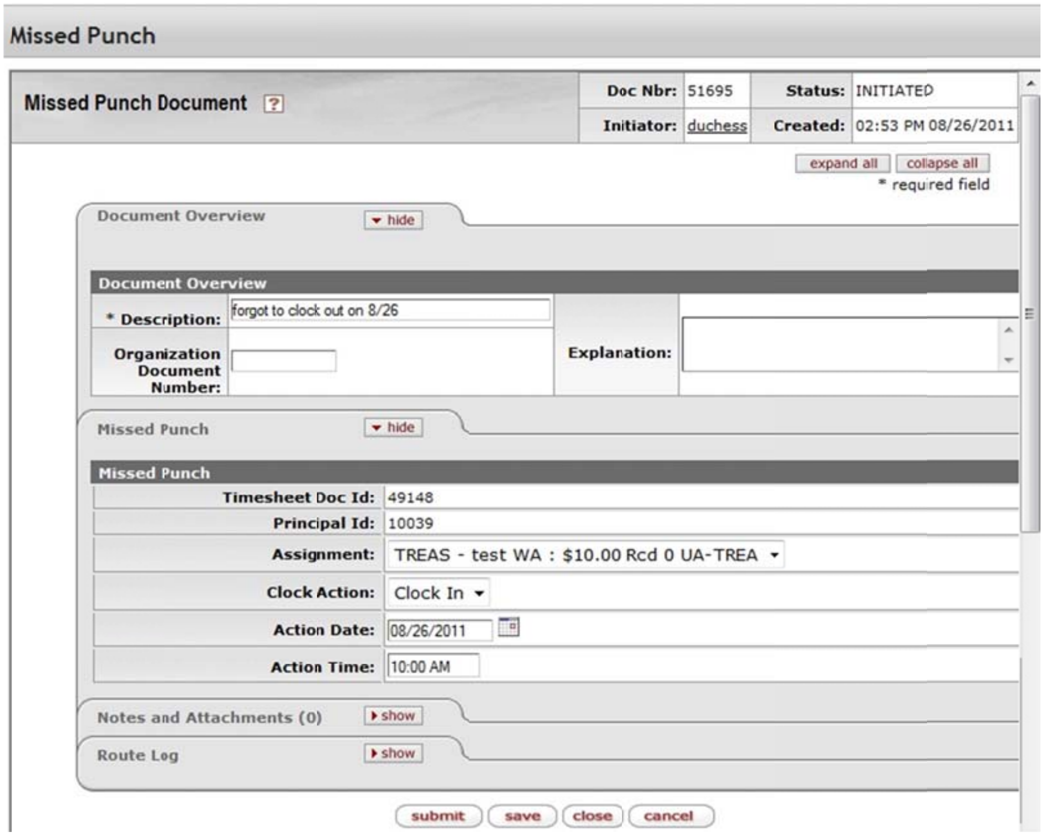
To clock out, log into KPME Time and click on **Clock Out** button. (Work Status will show you are clocked out.)

## Adding a Missed Punch

If you missed your last clock action, you can click on the **Missed Punch** button.

This opens the *Missed Punch* maintenance document, where you enter your missing clock action information and submit it for approval.

Once you submit this document, the missed clock action is added to your timesheet, and the missed punch document is routed to your timesheet approver for approval.




**<u>Only submit a Missed Punch document if you missed your last clock action</u>**.

To submit this document, please follow the steps below:

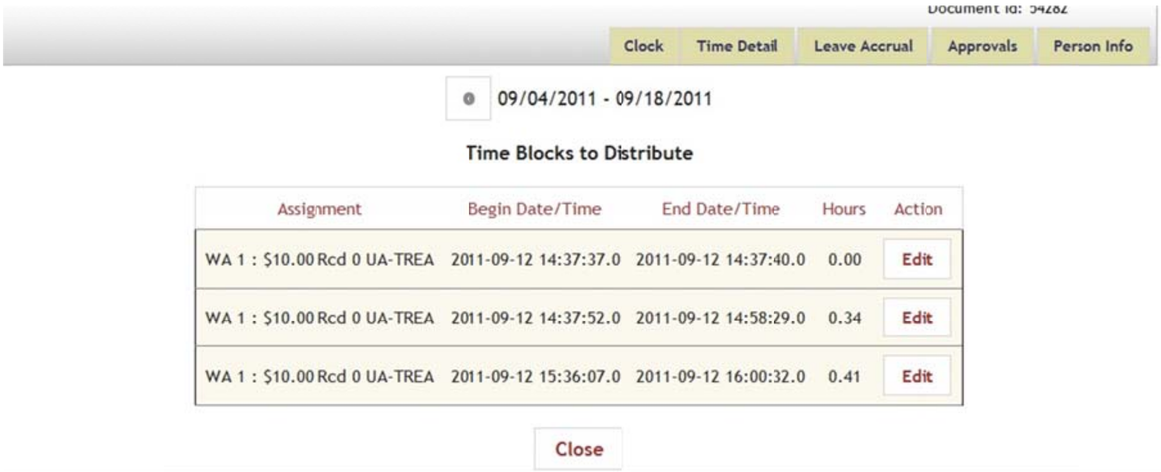
1. From the *Clock* tab, click on **Missed Punch**. This opens the *Missed Punch* maintenance document.
2. In the <u>Description</u> field, enter a brief <u>Description</u> (i.e., forgot to clock out on 8/20).
3. Select the <u>Assignment</u> where you missed punching the clock.
4. Enter the <u>Action Date</u> of your missed punch.
5. Enter the <u>Action Time</u> of your missed punch.
6. Click **Submit** to submit the information to your timesheet.

## Distributing Work Hours

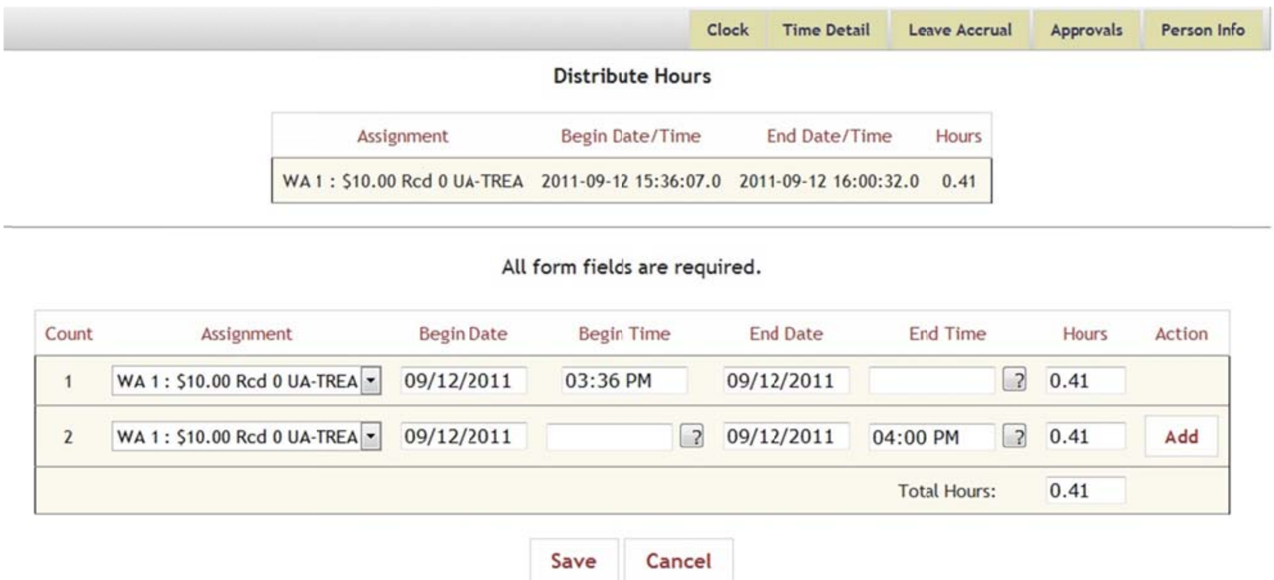
You can clock in and out of a single assignment and then click on the **Distribute Time Blocks** button to distribute hours at the end of the day to multiple assignments.

This opens the *Time Blocks to Distribute* screen, where you select the Time block you want to edit.

1. From the *Clock* tab, click on **Distribute Time Blocks**. This opens the *Time Blocks to Distribute* screen.




2. Select the Time block you want to distribute and click **Edit**.
3. This opens the *Distribute Hours* screen, and shows your selected Time block, where you can modify either the <u>Begin Time</u> or the <u>End Time</u> in the blank fields on the screen, or assign the hours to another assignment by selecting that assignment in the <u>Assignment</u> field.




4. When finished, click **Save**.

## Adding Leave Hours to a Timesheet

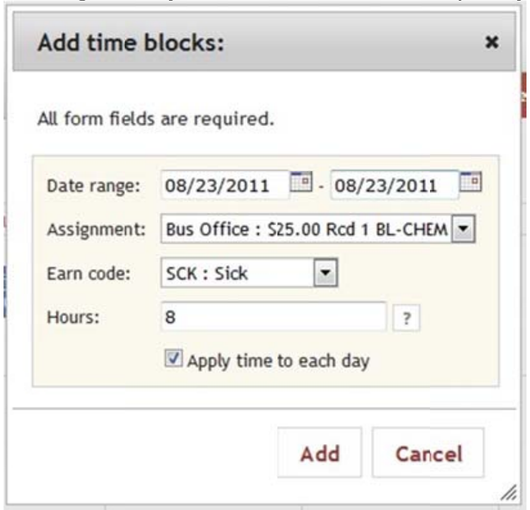
Any **Clock Entry** or **Manual Entry** employee, who qualifies for Leave Hours such as, paid Time off or sick pay will use the *Time Detail* tab to enter those hours.

This requires that you enter the number of “hours” to track your usage. Once the appropriate benefit earn code is selected, the ‘Add Time blocks’ entry box will hide the ‘In/Out’ fields and display an ‘Hours’ input field.

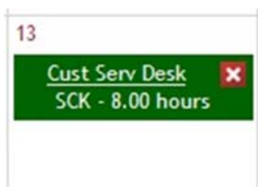
To add benefit leave hours to your timesheet:

1. Log into KPME Time (and go to the *Time Detail* tab.)

2. On the pay period calendar of your timesheet, select the day or days to add:
    - To add leave hours for a single day, click on the day you want to add.
    - To add leave hours for multiple days, such as Monday through Friday, just click on Monday, while holding down your mouse button and quickly drag the cursor over to Friday, then release it.




3. Select the correct leave Earn Code (such as sick or vacation).
4. In the Hours field, enter the number of hours you are taking. (Roll your cursor over the Question Mark icon to view a list of supported entries in this field.)
5. If you selected a range of dates, make sure the 'Apply Time to each day' checkbox, is checked so the hours you entered are applied to each day.
6. Click **Add** and verify the leave block(s) are correct on your timesheet.




To **modify** a leave block, click on the underlined Assignment name (in the example above, you would click on 'Cust Serv Desk'). This reopens the 'Add Time Blocks' pop-up and you can modify the Date Range, Assignment, leave Earn Code and the amount of Hours you entered. When finished, click **Add**.

To **delete** a leave block, click on the red X in the right corner of the leave block. When asked to confirm the deletion, click **OK** to delete it.

## Viewing a Summary of your Hours

To view a summary of the hours that you have recorded, go to the *Time Detail* tab and look at the **Summary** section located below your pay period calendar. This section shows you the total 'Worked Hours' for each day along with a breakdown of the hours your worked by assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides you with a Weekly and Period Total.

For a more detailed explanation of the Summary, please go to the topic entitled, 'Summary of Hours.'

## Login/clocking Problems

1. Check with your Department Approver or Processor to make sure that your Time Assignment was established.

2. If the Assignment was established and you still cannot login, verify that you logged in under the right username and password.

3. If you still cannot login, contact your operational support team.

# Manual Entry Timekeeping

**Manual Entry** employees use the *Time Detail* tab to manually add Time blocks for the hours they work or the leave hours they take. It will also allow certain employees to add a fixed dollar amount (such as tips). When you login to KPME Time, your timesheet will open on this tab.

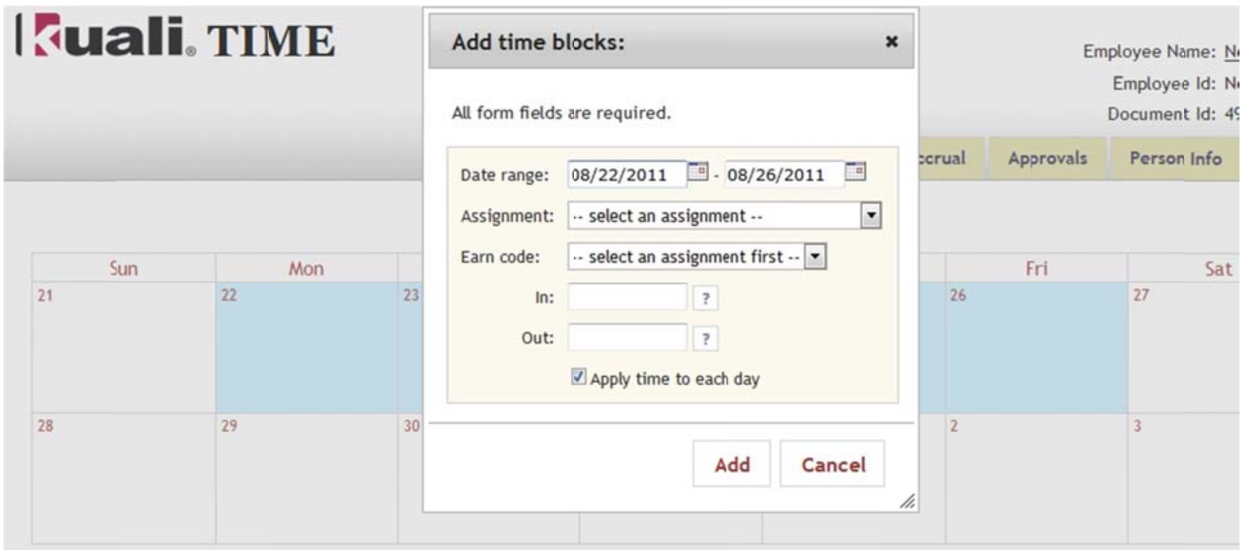
## Adding Time Blocks to a Timesheet

In order to add work hours, leave hours, or fixed dollar amounts to your timesheet, you must add a Time block:

1. Log into KPME Time. (Timesheet opens on the *Time Detail* tab.)
2. On the pay period calendar, select the days to add:
   - To add a Time block for a single day, click on the day you want to add.
   - To add a Time block for multiple days, such as Monday through Friday, just click on Monday, while holding down your mouse button and quickly drag the cursor over to Friday, then release it.

   If you selected multiple days, it highlights those days, and the 'Add Time Blocks' pop-up opens showing the range of dates you selected. A single day entry, just opens the 'Add Time Blocks' screen with the date range showing as the same day.

   If you work an **overnight shift**, you can use this drag and drop method to select your two days. But, make sure you uncheck the 'Apply Time to each day' checkbox.



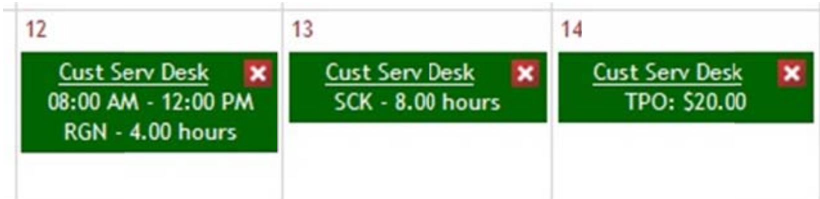

3. Verify the Date Range is correct.
   - You can also use the calendar icon to pop-up a calendar and manually change each of the dates you selected. For example, you could change the dates to be: 08/23/2011 to 08/24/2011.
4. Select the Assignment for the Time block you are adding. (If you only have one assignment, it will already be selected.) A Time **Assignment** is a unique combination of your Job, Job Number, Work Area (and Task), and is used to record the hours that you work.
5. Select the appropriate Earn Code. (The '**regular pay**' earn code is always at the top of the earnings list.) the fields on this

6. You can enter Time blocks for hours you have worked, hours of leave Time, or for fixed dollar amounts:
   - If your entry is to add a Time block for hours you have worked:
     a) In the 'In' box, enter the Time you started work. (Roll your cursor over the Question Mark icon to view a list of supported entries in this field.)

     b) In the 'Out' box, enter the Time you ended work.
   - If your entry is to add a Time block of leave hours (e.g., sick, vacation):
     a) In the 'Hours' box, enter the number of leave hours you are taking.

- If your entry is to add an amount (e.g. tips):
    a) In the 'Amount' box, enter the fixed dollar amount.

7. When checked, the 'Apply Time to each day' checkbox will enter the same Time blocks each day, for the range of dates you entered. **Uncheck this box for overnight shifts.**
8. When finished, click **Add**. This adds Time blocks for your worked hours, your leave hours taken, or the fixed amount you entered. (The illustration below shows an example of each of these entries.)




To **modify** a Time block, click on the underlined Assignment name (in the example above, you would click on 'Cust Serv Desk'). This reopens the 'Add Time Blocks' pop-up and you can modify the Date Range, Assignment, Earn Code and In and Out Times. For leave hours, you can modify the Hours, and for a fixed amount entry, you can modify the Amount. When finished, click **Add**.

To **delete** a Time block, click on the red X in the right corner of the Time block. When asked to confirm the deletion, click **OK** to delete it.

You can continue to edit your timesheet until it is approved by your supervisor.

If you have any questions about the Assignments or Earn Codes you should use, please see your supervisor.

# Summary of Hours

The **Summary** is a view-only section on your timesheet that shows the total 'Worked Hours' for each day along with a breakdown of the hours worked by assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a Weekly and Period Total.

Summary

| | 07/25 | 07/26 | 07/27 | 07/28 | 07/29 | 07/30 | Week 1 | 07/31 | 08/01 | 08/02 | 08/03 | 08/04 | 08/05 | 08/06 | Week 2 | Period Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Worked Hours: | 16.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 16.00 | 0.00 | 9.00 | 9.00 | 9.00 | 9.00 | 9.00 | 0.00 | 45.00 | 61.00 |
| Regular Hours | | | | | | | | | | | | | | | | |
| Cust Serv Desk : $16.00 Rcd 0 UA-FMOP | 16.00 | | | | | | 16.00 | | | | | | | | | 16.00 |
| Bus Office : $18.00 Rcd 1 BL-CHEM | | | | | | | | | | | | | | | | 16.00 |
| Lab : $18.00 Rcd 1 BL-CHEM | | | | | | | | | 9.00 | 9.00 | 9.00 | 9.00 | 4.00 | | 40.00 | |
| Regular Hours | 16.00 | | | | | | 16.00 | | 9.00 | 9.00 | 9.00 | 9.00 | 4.00 | | 40.00 | 88.00 |
| Overtime Hours | | | | | | | | | | | | | | | | |
| Bus Office : $18.00 Rcd 1 BL-CHEM | | | | | | | | | | | | | | | | |
| Lab : $18.00 Rcd 1 BL-CHEM | | | | | | | | | | | | | 5.00 | | 5.00 | 5.00 |
| Overtime Hours | | | | | | | | | | | | | 5.00 | | 5.00 | 5.00 |

An earn code is a classification of earning that represents regular hours worked or special type of earning like sick Time, shift or premium pay.

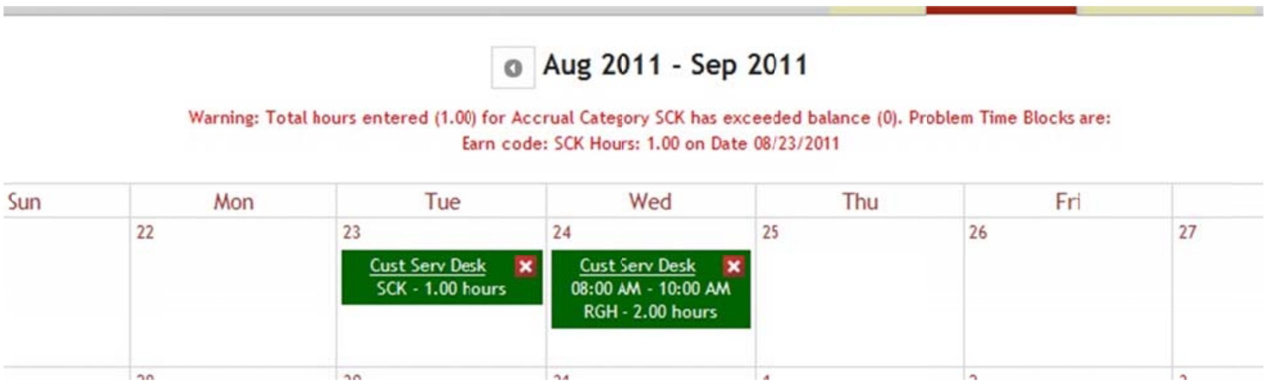
Regular hours that contribute toward weekly overtime eligibility are totaled and displayed. Sick or Vacation hours will also appear in separate rows. Overtime or Compensatory hours, if they exist, will appear in a row below your regular hours. Additional pay hours, such as shift rates or premiums will appear in rows above or below that.

# Timesheet Errors

If there are any timesheet errors, the ‘Add Time Block’ or the *Time Detail* tab will identify the entry involved by highlighting that field in red, and/or displaying an error message in red text. Corrective action should be taken to fix the fields highlighted or listed in the error message.

Some entries, such as using sick Time in excess of available balance, will issue a warning. If there are only warnings, the timesheet will advance for approval, but your Approver will see that a warning exists on your timesheet.

The following is an example of a timesheet warning:




# Other Employee Options Available in KPME Time

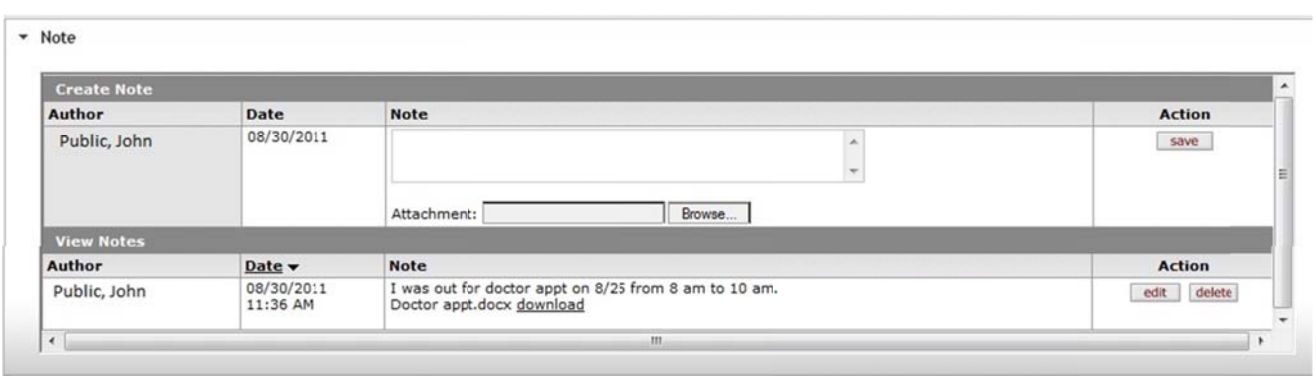
## Adding a Note

Anyone with access to a timesheet (employee, approver, reviewer, or administrator) can enter a note in the Note section.

To add the first note, click **'add notes'** and the notes entry page will appear. You can also attach documents and images as desired. Be sure to click **save** on the notes line to save your note. Notes are saved in the Workflow system where the timesheet documents route.

1. Click on the N**ote** section to expand it.
2. To add the first note, click the **Add Note** button in that section.
3. In the Note textbox that appears, type a note and click **Save.**

   Once a note has been added, the timesheet displays that note and provides a blank textbox where you can enter and save a new note.



You can also add an attachment, such as a Word, Excel or email file to a note:

1. In the 'Attachment' field just below the Note textbox, click the **Browse...** button.
2. This opens the 'Choose File to Upload' dialog box, where you select the name of a file to upload and click **Open**.
3. Verify the Attachment field shows the selected file is ready to upload, then click **Save**. The title of the file you attached will appear next to a download link.

   If you click the download link, it allows you or others, such as your timesheet Approver to view the attached file.

   Use the **Edit** or **Delete** buttons to modify a note, or to remove an existing note that you added.

## Viewing the Route Log

Click on the **Route Log** section to open that section and view the approval routing for your timesheet.

## Leave Accrual tab

If you qualify for leave, then you will have the *Leave Accrual* tab on your timesheet.

The leave balances displayed come directly from your HR or Payroll system, and will be updated according to your department's schedule.

Since leave balances usually lag since they are computed after the end of the previous pay period, your balances may not reflect your current totals, and do not update based on usage recorded on the timesheet.

You will receive a warning on your timesheet if you attempt to use more than your available balance. Check with your supervisor to find out your department's rules about going into negative balances.

## Person Info tab

Every timesheet includes the *Person Info* tab. If you open that tab, it will show you details about your person, jobs and roles.

The "Your Person Details" section shows your employee name and employee Id number.

The "Your Jobs" section is a reference tool that shows you what Jobs and Time Assignments you have, including your Organization, Work Area or Task and the name of your Approver.

The "Your Roles" section is a reference tool that shows if you have any approver or administrative roles.

# Approver Options

This section discusses the key tasks that Approvers can perform in the KPME Time system, such as approving timesheets, entering/modifying Time Blocks, reviewing missed clock punches, adding Notes to a timesheet, or viewing Route Logs.

# Approving Missed Punches

An employee who missed a clock action will submit a Missed Punch document to add the missed punch to their timesheet and to inform you (the Approver) of that missed clock action.

The Missed Punch document will route to your Workflow Action List, where you can approve the document.

# Correcting Employee Time Blocks or Leave Hours

To correct Time Blocks or Leave Hours on an employee's timesheet, follow these steps:

1. Log in to KPME Time and go to your *Approvals* tab.
2. Select the Department you need from the Department dropdown. That displays a list of employees for your work area(s).
3. Find the timesheet of the employee you need to correct and click on its Document Id.
4. This opens the timesheet on the employee's *Time Detail* tab, where you can add, modify or delete Time blocks or leave hours.
    a. To modify a Time block or a block of leave hours, click on that block, change the appropriate values and click **Add**.
    b. To add a Time block or a block of leave hours, click on a day, and complete the fields on the 'Add Time Blocks' screen and click **Add**.
    c. To delete a Time block or a block of leave hours, click on the red X in the right corner of the block.
2. Click **Return** in the header to return to your *Approvals* tab.

# Approving Timesheets

At the end of each pay period, Approvers must approve the timesheets for the employees in the Work Areas that they supervise.  When Approvers approve timesheets, they verify that the hours worked are correct and recorded for the correct assignment.

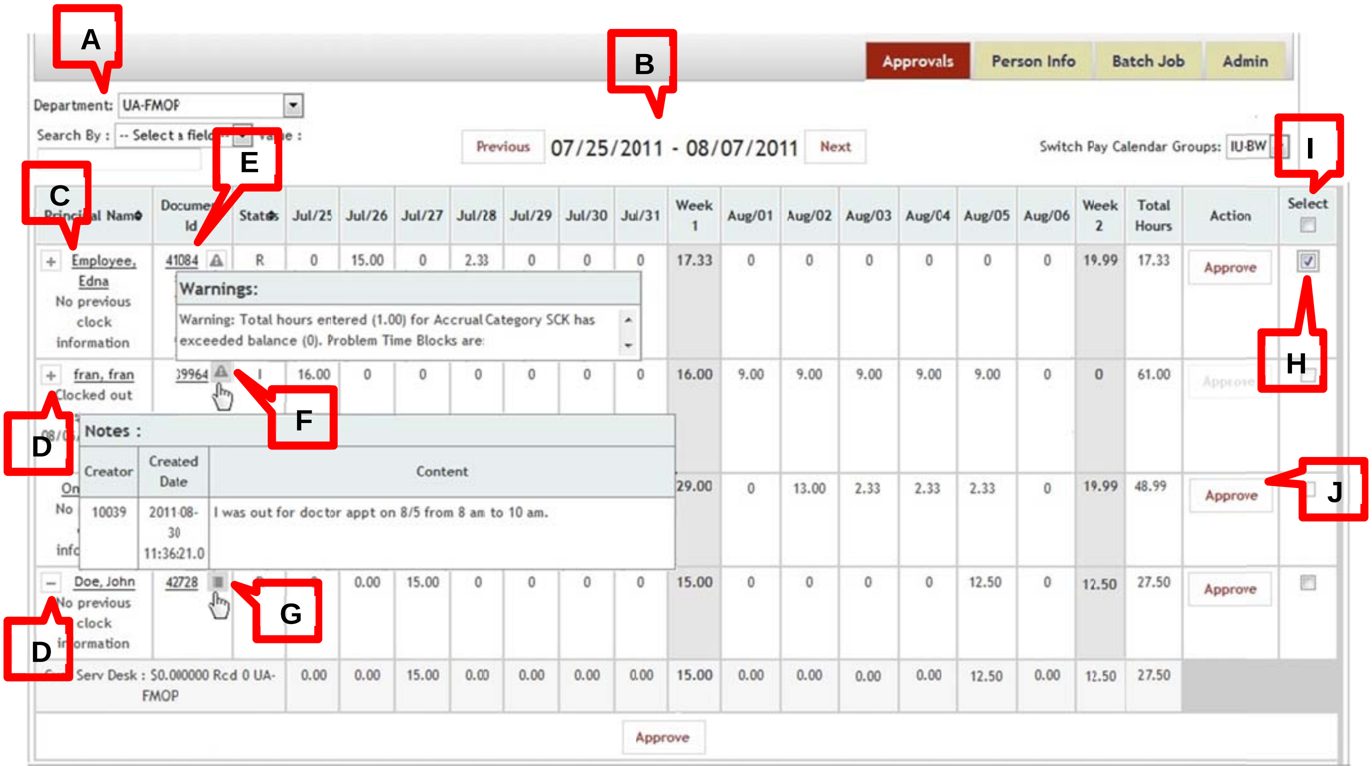
## Employee Submission

Employees click on the **Submit** button to route their timesheets, and they can continue to enter edits on them up until they are approved by their supervisor.   After this approval, the employee may no longer make any changes to their timesheet.

## Approver and/or Processor Approvals

Timesheets route from the employee to the Approver using Workflow.  A department can also set up a second level of approval using the **Processor** role.

When you log into the system as an Approver, you will see the *Approvals* tab.  Here you can see all of the employees you supervise.  The status of the approval is shown for each timesheet as is a summary of worked hours for each employee.




***Note:*** This illustration presents all the options available on your *Approvals* tab and is intended only to demonstrate those options. Please note you will only be able to open and view one set of timesheet Notes or Warnings at a Time.

(The letters located next to each option below are used to show that option on the illustration.)

Let's look's at the options available to you in the *Approvals* tab. You can:

- **A** Select the Department you want to view from the dropdown list at the top, if you approve timesheets for more than one department.
- **B** Click the **Previous** or **Next** buttons, when present, to view the previous or next timesheet for your set of employees.
- **C** Click on the employee name to open the *Person Info* tab for that employee.
- **D** Click on the plus sign ( + ) next to the employee's name to open a section that shows you the hours recorded under each Assignment. Click the minus sign ( **–** ) to close up the Assignment details.
- **E** Click on the Document ID of the timesheet, to open that employee's timesheet.
- **F** Click on the Warnings icon next to the Document ID number to open a pop-up box to view the warnings on that timesheet.
- **G** Click on the Notes icon next to the Document ID number to open a pop-up box to view the notes on that timesheet.
- **H** Click an individual "Select" checkbox when that timesheet is ready to approve.
- **I** Click the "select ALL" checkbox at top of the 'Select' column to select all of the 'ready-to-approve' timesheets in your Action List for approval.
- **J** Click the **Approve** button to complete an approval.

If the information in the summary is not sufficient for you to do your approval, then click on the + (plus) sign next to the employee's name to view a breakdown of the hours recorded by Assignment.

Also note under each employee's name, you can view their last clock action, if any.  There is also a 'Status' column that shows you the current routing status of each timesheet.  A status of "I" indicates the timesheet was "initiated" and still in the employee's hands. A status of "R" indicates the employee has submitted the timesheet to route it for approval, and a status of "F" indicates the timesheet was approved and is final.

To approve a timesheet, click the 'select' box next to the employee you wish to approve and click the **Approve** button at the bottom. This completes the approval and any notifications are removed from your Action List.

Detailed steps are presented below for individual and bulk approvals.

To approve an individual timesheet, follow these steps:

1. Log in to KPME Time and go to the *Approvals* tab
2. Select the Department you wish to approve from the <u>Department</u> dropdown. That displays a list of timesheets you can approve.
    - You can also use the <u>Search By</u> field to search for specific timesheets by Document ID, Principal Name, or Work Area.  Select the parameter you wish to search by and in the <u>Value</u> field, enter the specific value you want to find, e.g.
3. Review the **Summary** of hours for that timesheet. You can click on the + (plus sign) next to the employee's name to open a section that shows you the details recorded under each Assignment.  [Click the **–** (minus sign) to close up the Assignment section.]

| | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| − Doe, John No previous clock information | 42728 | R | 0 | 0.00 | 15.00 | 0 | 0 | 0 | 0 | 15.00 | 0 | 0 | 0 | 0 | 12.50 | 0 | 12.50 | 27.50 |
| Cust Serv Desk : $0.000000 Rcd 0 UA-FMOP | | | 0.00 | 0.00 | 15.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15.00 | 0.00 | 0.00 | 0.00 | 0.00 | 12.50 | 0.00 | 12.50 | 27.50 |

4. If necessary, enter any changes to the Time blocks or leave hours on the timesheet:
    a. Click on the <u>Document Id</u> to open that timesheet on the employee's *Time Detail* tab.  You can now add, modify or delete Time blocks or leave hours.
        i. To modify a Time block or a block of leave hours, click on that block, change the appropriate values and click **Add**.
        ii. To add a Time block or a block of leave hours, click on a day, complete the fields on the 'Add Time Blocks' screen and click **Add**.
        iii. To delete a Time block or a block of leave hours, click on the red X in the right corner of the block.
    a. When finished, click **Return** in the header to return to your *Approvals* tab.
5. To approve that timesheet, click the "Select" box for that timesheet and click the **Approve** button. This completes the approval and removes the timesheet from your Action List, and updates the 'Status' field to "F" for final.

To approve more than one timesheet at a Time:

1. Log in to KPME Time and go to the *Approvals* tab
2. Select the Department you wish to approve from the <u>Department</u> dropdown. That displays a list of timesheets you can approve.
3. Review the **Summary** of hours information for each employee's timesheet. You can click on the + (plus sign) next to the employee's name to open a section that shows you the details for each Assignment. [Click the **–** (minus sign) to close up the Assignment section.]
4. If necessary, enter any changes to the Time blocks or leave hours on those timesheets:
    a. Click on the <u>Document Id</u> of the timesheet, which opens it on the employee's *Time Detail* tab. You can now add, modify or delete Time blocks or leave hours.
        i. To modify a Time block or a block of leave hours, click on that block, change the appropriate values and click **Add**.
        ii. To add a Time block or a block of leave hours, click on a day, complete the fields on the 'Add Time Blocks' screen and click **Add**.

iii. To delete a Time block or a block of leave hours, click on the red X in the right corner of the block.

b. When finished, click **Return** in the header to return to your *Approvals* tab.
c. Repeat this step (step 4) for each timesheet you need to adjust.

5. To mark a timesheet in your action list for approval click the "Select" box for that timesheet. You can select more than once timesheet in your Action List to approve.
6. To mark all timesheets in your Action List for approval, use the select "all" checkbox at the top of the 'Select' column.
6. To take the approval action, click the "**Approve**" button at the bottom of the Action List. This completes the approval and removes all selected timesheets from your Action List, and updates the 'Status' field to show "F" for final.

When finished approving your timesheets you can **logout**.

## Timesheets Not Ready for Approval

Some timesheets may have problems that prevent them from being approved. In this case, the Approver should make needed corrections to the timesheet before approving it. For some departments this is the only approval, and it verifies that it is okay to pay employees for the hours worked, and the timesheet becomes Final.

Timesheets with problems will not appear with an approval button in the Action column (the column will be blank). These timesheets must be individually opened and corrected before approval can occur.

Approvers will be unable to approve timesheets with the following problems:

**Overlapping Time blocks:** Time blocks which include the same hours.

**Hours charged to an invalid assignment:** This means hours were charged to an assignment that was later deleted or end-dated on a prior date. A warning message will be displayed when viewing a timesheet with invalid Time blocks. To correct this problem simply open the timesheet, and make any needed corrections to the employee's hours or assignment.

**Expected Hours not met:** Appointed staff employees have a number of expected hours that must be accounted for each week. For example, a full-Time Biweekly employee must account for 40 hours, while a half-Time Biweekly employee needs to account for 20.

## Automated Approvals

KPME Time will automatically approve an unapproved timesheet at designated Times if the timesheet is deemed "ready to approve." Timesheets are deemed "ready to approve" if they meet all the approval conditions required for Approver approval.

Please note that the automated approval process is not to be used in lieu of Approvers reviewing and correcting timesheets. It is a fail-safe measure designed to ensure that employees are paid promptly if a problem keeps an Approver from completing their approvals.

## Adding a Note to Employee Timesheets

Approvers can add a Note to an employee's timesheet, and view any other notes already entered on the timesheet.

Please go to the topic heading entitled, "Adding a Note" under the employee section of this manual for detailed steps on how to add a Note or how to attach a file as an Attachment within a Note.

## Checking the Route Log

The Route Log for a timesheet shows who has approved a timesheet and who still needs to approve it.


To check the Route Log for a document, click on the **Route Log** section at the bottom of the timesheet. The Route Log will open and show who has taken action and whose action, if any, is still pending.

- The Document ID section contains identifying information about the document itself.
- The Actions Taken section shows who has taken action on the timesheet and when. Note that timesheets will appear here as initiated by the employee, though the KPME Time system initiates them on behalf of the employee. Timesheets are completed and submitted by the employee for approval at the end of the pay period.
- The Pending Action Requests section shows who still needs to take action on the document. It is possible that multiple requests exist at the same Time. This situation will occur if the employee has multiple KPME Time Assignments with different Approvers.
- The Future Action Requests section shows who will need to take future action on the document.

# More Options for Approvers

This section discusses other options that KPME Time provides for Approvers, Reviewers and Administrators, which were not discussed in the previous sections of this manual. It also includes a brief review of how to view the timekeeping rules set up for your department.

## Using Inquiry Pages

KPME Time provides three Inquiry screens that are useful tools for looking at the Time Blocks recorded on a timesheet, the clock transactions logged for an employee, or the missed clock punches for an employee.

### Time Block Inquiry

Reviewers, Approvers, and Department Administrators who have employees in KPME Time can use the **Time Block Inquiry** lookup screen to view the Time blocks recorded on a particular timesheet, or for a specific employee.

***Note:*** Time Blocks are never deleted from the system, they are just inactivated.


To perform a Time Block Inquiry, follow these steps:

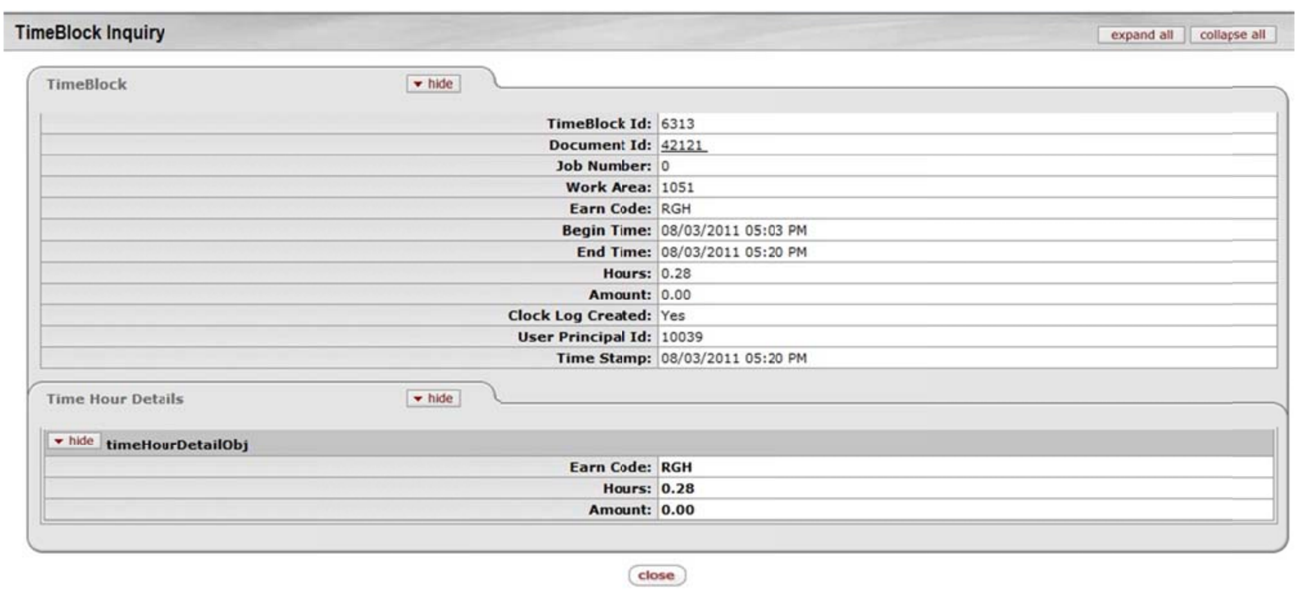
1. In the Inquiries column, click the "Time Block Inquiry" link.
2. Enter the Document ID of the timesheet you wish to see to view the Time Blocks entered on that particular timesheet.
   - You can also search by other criteria including the User's Principal Id, the Document Status, and the Pay Begin and Pay End dates.
3. Click **Search**.

The result of this search is displayed in a tabular format and includes: Document ID, User Principal ID, Earn Code, Begin Time and End Time.

34 items retrieved, displaying all items.1

| Document Id | User Principal Id | Earn Code | Begin Time | End Time |
|---|---|---|---|---|
| 42121 | 10039 | RGH | 08/03/2011 05:03 PM | 08/03/2011 05:20 PM |
| 42121 | 10039 | RGH | 08/03/2011 05:20 PM | 08/03/2011 05:28 PM |
| 42121 | 10039 | RGH | 08/04/2011 12:00 AM | 08/04/2011 10:26 AM |
| 42121 | 10039 | EC5 | 08/03/2011 05:30 PM | 08/04/2011 12:00 AM |
| 42121 | 10039 | EC5 | 08/04/2011 12:00 AM | 08/04/2011 12:00 AM |

If you click on the underlined Document Id in the results, it opens a full description of that Time block, so you can see the Job Number, Work Area, Earn Code, Hours or Amount, etc., along with a confirmation indicating whether or not the entry was logged by the clock.




Click **Close** to close the Time Block details and return to your search results.

## Time Block History Inquiry

Reviewers, Approvers, and Department Administrators who have employees in KPME Time can use the **Time Block History Inquiry** lookup screen to view the history of the Time blocks entered on a particular timesheet or for a specific employee. The history recorded here will show when Time blocks were added, updated, or deleted from the employee's timesheets.

***Note:*** Time Blocks are never deleted from the system, they are just inactivated.


To perform a Time Block History Inquiry, follow these steps:

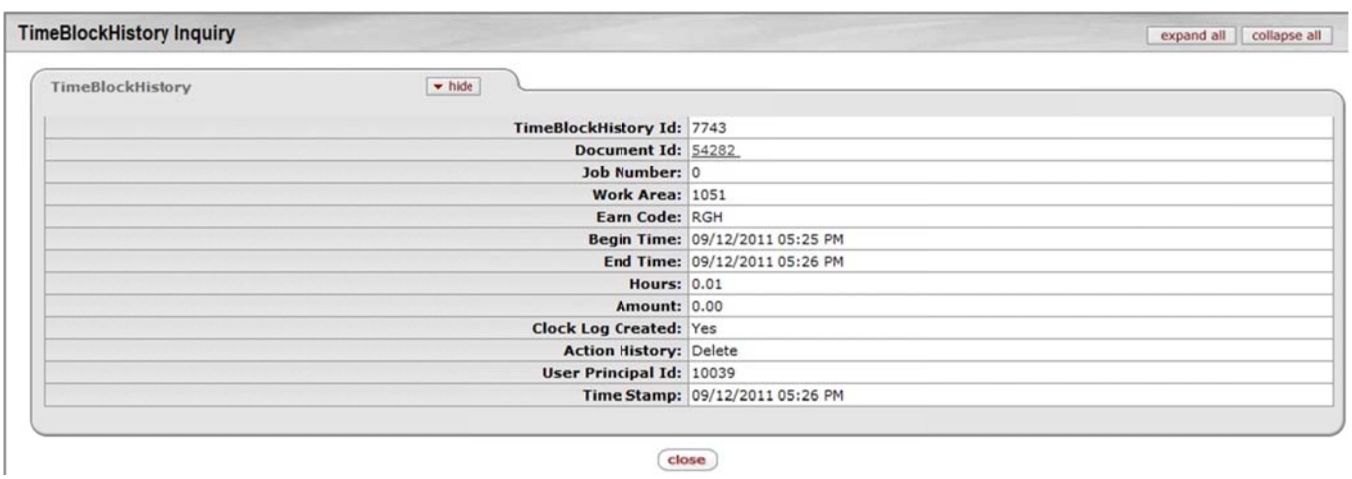
1. In the Inquiries column, click the "<u>Time Block History Inquiry</u>" link.
2. Enter the <u>Document ID</u> of the timesheet you wish to see to view the Time Blocks entered on that particular timesheet.
   - You can also search by other criteria including the <u>User's Principal Id</u>, the <u>Document Status</u>, and the <u>Pay Begin</u> and <u>Pay End</u> dates.
3. Click **Search**.

The result of this search is displayed in a tabular format and includes: Document ID, User Principal ID, Earn Code, Begin Time and End Time.

48 items retrieved, displaying all items.**1**

| Document Id | User Principal Id | Earn Code | Begin Time | End Time |
|---|---|---|---|---|
| 42121 | 10039 | RGH | 08/03/2011 05:03 PM | 08/03/2011 05:20 PM |
| 42121 | 10039 | RGH | 08/03/2011 05:20 PM | 08/03/2011 05:28 PM |
| 42121 | 10039 | RGH | 08/03/2011 05:30 PM | 08/04/2011 12:00 AM |
| 42121 | 10039 | RGH | 08/04/2011 12:00 AM | 08/04/2011 10:26 AM |

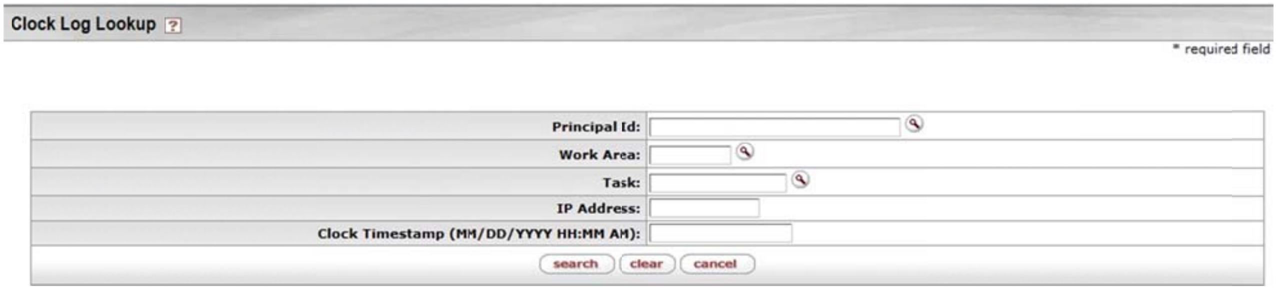
If you click on the underlined <u>Document Id</u> in the results, it opens a full description of that Time block, so you can see the Job Number, Work Area, Earn Code, Hours or Amount, etc., along with the Action (History) performed on that Time block (add, update or delete).




Click **Close** to close the Time Block History details and return to your search results.

## Clock Log Inquiry

Reviewers, Approvers, and Department Administrators who have employees in KPME Time can use the **Clock Log Lookup** screen to view the clock transactions logged on a particular timesheet.




To perform a Clock Log Inquiry, follow these steps:

1. In the Inquiries column, click the "Clock Log" link.
2. Enter the Principal ID of the employee you wish to view. (You can also search by Work Area and/or Task, or IP Address.)
3. Click **Search**.

4 items retrieved, displaying all items.1

| Principal Id | Work Area | Task | IP Address | Clock Action | Job Number | UserPrincipal Id | Clock Timestamp (MM/DD/YYYY HH:MM AM) | Clock Timestamp Timezone | Timestamp | Missed Punch Document Id |
|---|---|---|---|---|---|---|---|---|---|---|
| fran | 1004 | 2 | 129.186.77.99 | CI | 1 | fran | 09/09/2011 11:14 AM | America/Indianapolis | 09/09/2011 11:14 AM | |
| fran | 1004 | 2 | 129.186.77.99 | CO | 1 | fran | 09/09/2011 11:56 AM | America/Indianapolis | 09/09/2011 11:56 AM | |
| fran | 1004 | 2 | 129.186.77.99 | CI | 1 | fran | 09/21/2011 05:42 PM | America/Indianapolis | 09/21/2011 05:44 PM | |
| fran | 1004 | 2 | 129.186.77.99 | CO | 1 | fran | 09/21/2011 05:42 PM | America/Indianapolis | 09/21/2011 05:44 PM | |

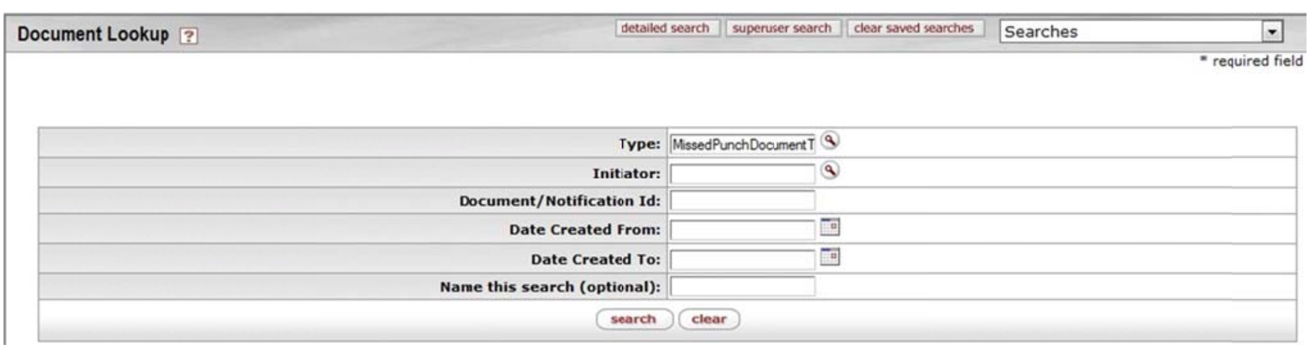
4 items retrieved, displaying all items.1

Export options: CSV | Excel | XML

The result of this search is displayed in a tabular format and includes: Principal ID, Work Area, Task, IP Address, Clock Action, Job Number, User Principal ID, Clock Timestamp, Clock Timestamp Time zone, and Missed Punch Document ID.

## Missed Punch Inquiry

Reviewers, Approvers, and Department Administrators who have Clock Entry employees can use the **Missed Punch Inquiry** lookup screen to find Missed Punch documents that were submitted by employees to report missed clock in's or clock outs.

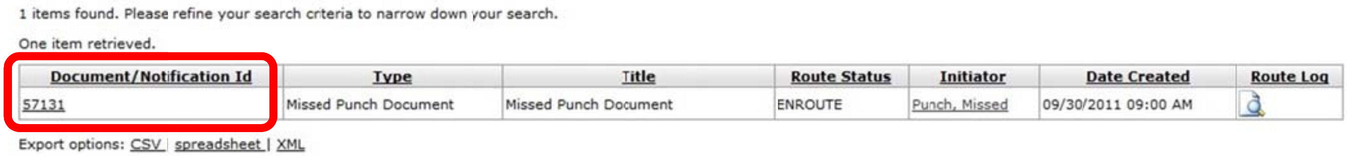



To perform a Missed Punch Inquiry, follow these steps:

1. In the Inquires column, click the "Missed Punch Inquiry" link.
2. Enter the Document ID of the Missed Punch document that was submitted by the employee. You can also search for these documents by Initiator (user name of the employee), or by date range in the Date

Created From and Date Created To fields. (**HINT!** You can use the lookup button next to the Initiator field to search for a specific employee.)

3. Click **Search**. This will find any Missed Punch Document that meets your search criteria.



1 items found. Please refine your search crteria to narrow down your search.

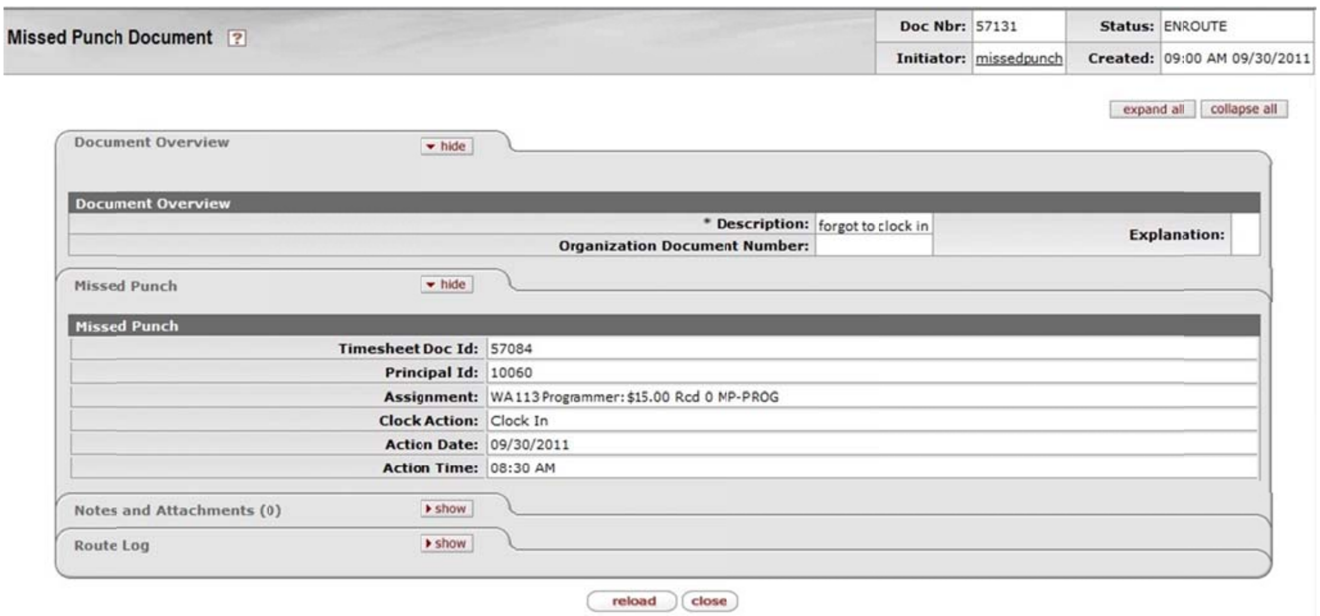
One item retrieved.

| Document/Notification Id | Type | Title | Route Status | Initiator | Date Created | Route Log |
|---|---|---|---|---|---|---|
| 57131 | Missed Punch Document | Missed Punch Document | ENROUTE | Punch, Missed | 09/30/2011 09:00 AM | |

Export options: CSV | spreadsheet | XML

The information displayed includes the Document/Notification ID, (Document) Type, Title, Route Status, Initiator, Date Created and Route Log.

4. Click on the underlined Document/Notification ID number to open the Missed Punch Document and view the date, time and clock action that the employee missed.



Missed Punch Document

| Doc Nbr: | 57131 | Status: | ENROUTE |
|---|---|---|---|
| Initiator: | missedpunch | Created: | 09:00 AM 09/30/2011 |

expand all | collapse all

Document Overview ▾ hide

**Document Overview**

| | | | |
|---|---|---|---|
| * Description: | forgot to clock in | Explanation: | |
| Organization Document Number: | | | |

Missed Punch ▾ hide

**Missed Punch**

| | |
|---|---|
| Timesheet Doc Id: | 57084 |
| Principal Id: | 10060 |
| Assignment: | WA 113 Programmer: $15.00 Rcd 0 MP-PROG |
| Clock Action: | Clock In |
| Action Date: | 09/30/2011 |
| Action Time: | 08:30 AM |

Notes and Attachments (0) ▸ show

Route Log ▸ show

reload | close

Click **Close** to close the Missed Punch Document and return to your search results.

# Viewing Timekeeping Rules

If you are an Approver, you will have the ability to view the rules established for your department.

All Rule maintenance screens will take you to a rule lookup screen. You can enter search criteria or simply click "Search" to view existing rules. It's recommended that you enter the Department ID in the search criteria if you wish to see all the rules for your particular department.

## Using the 'Show History' and 'Active?' radio buttons

When a rule row is edited, the system adds an inactive row for that rule with the same effective date as the new row being edited/added. This will inactivate the old values and the new values will be in place as of the effective date. A key is established which then allows the search to know which rows are prior edited rows vs. new rows.

**Show History**: The purpose of this radio button (on a rule or maintenance lookup screen) is to allow you to see the highest effective dated row only for a record, or the entire history of a record.

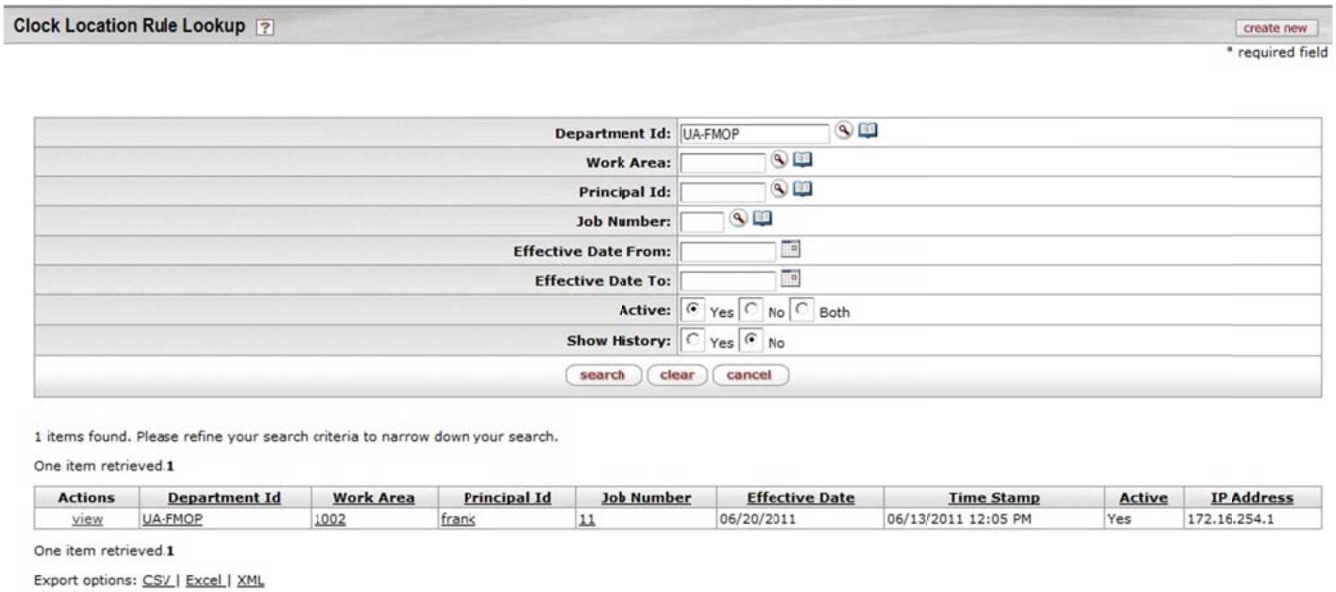
If Show History = No: The results will be the highest effective dated row as of the system date and any future rows.

If Show History = Yes: The results will be all rows in the database for the values entered.

**Active**: The purpose of this radio button is to allow you to filter rows based on their active status.

**To find the row which is in effect as of today, search for “active = **Both**, show history = **No**.”

In the example below (for the Clock Location Rule), we entered a Department ID and clicked Search. This found the active rules established for our department.




The rule results show the date and Time that the (Clock Location) rule was established, when it became effective, and the department, work area and ID of the employee who is required to clock at the IP Address listed in the rule.

The KPME Time system provides the following rules that you may be able to view, if applicable, for your department:

Departmental Rules:
- Clock Location
- Department Lunch Deduction
- Time Collection (clock entry vs. manual entry)
- Shift Differential

System Rules:
- System Lunch
- Grace Period
- Daily Overtime
- Weekly Overtime

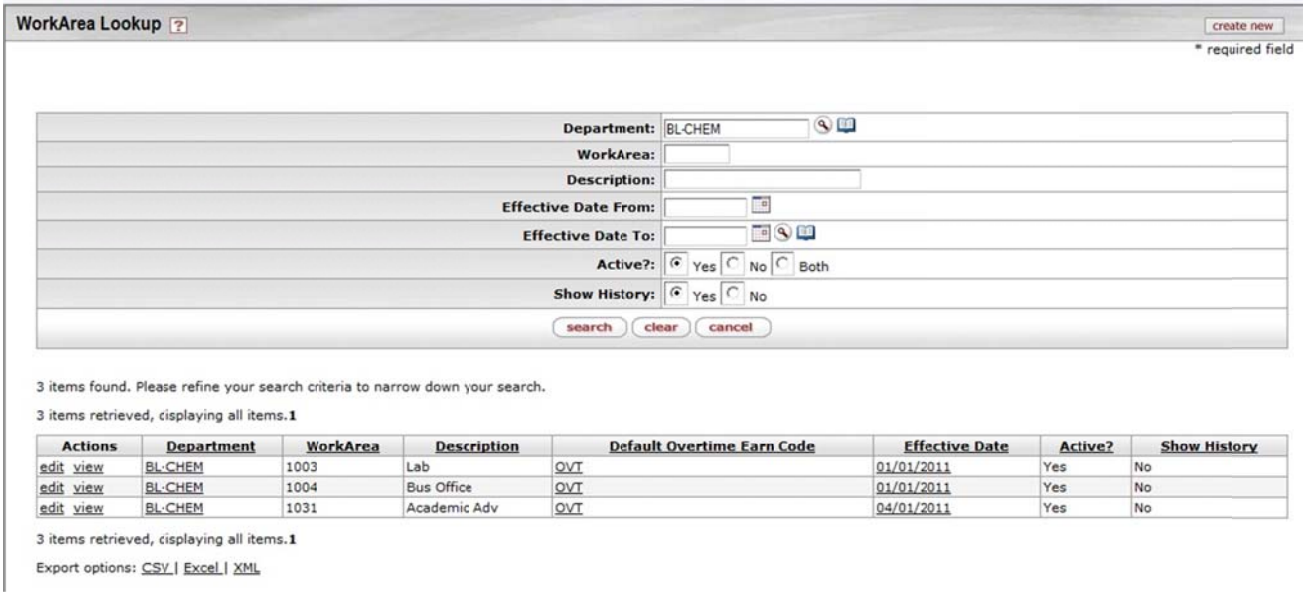
The rules that impact the Departments are discussed in more detail in the administrative section of this manual.

# Viewing Administrative Activities

You can use the **Work Area Maintenance** Lookup to view information about the work areas in your department.

To view your work area information, click the Work Area Maintenance link under the Administrative Activities column to open the **Work Area Maintenance** Lookup.

The results of a search on this lookup screen will show you the Department, a Description of that work area, the Effective Date, the Default Overtime Earn Code, and if it is an ‘Active’ work area.

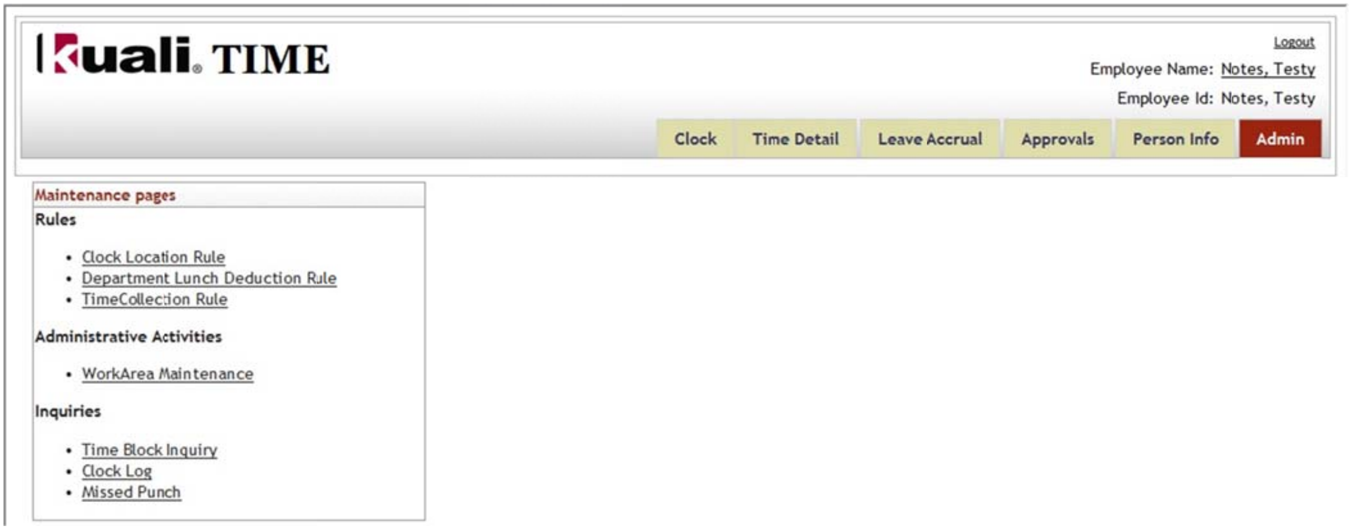



Can Approvers view the Work Area Maintenance screen (or any other maintenance screens)?

# Department Administrator Options

As a Department Administrator you will see the following Maintenance Pages when you go to your *Admin* tab.

You will use these pages to add departmental rules, to maintain your Work Areas, and to search for specific employee Time Blocks, clock transactions, or missed punches.




# Rules

Department Administrators can establish and maintain business rules that determine how their department will interact with KPME Time and what available options they will use. Business Rules allow you to customize the system to work in the most productive fashion for your department. Establishing Business Rules for your Work Areas is an important part of configuring KPME Time for use in your department. If used correctly, business rules can help make everyone's job easier and make KPME Time reflect your departmental policies and procedures.

Each departmental rule is briefly described below:

**Clock Location Rule:** Allows you to specify if employees should be clocking in and out from a particular computer, identified by that computer's IP address.

**Department Lunch Deduction Rule:** Determines if you will use a default lunch deduction. It also allows you to set a maximum number of minutes for an employee's lunch and that value, usually 30 minutes or 60 minutes is deducted from the employee's clocked hours.

**Time Collection Rule:** Determines whether your employees will record their work hours by clocking in and out (Clock Entry) or by adding hours manually to their timesheet (Manual Entry). Note that your Department may have requirements indicating which employee types must use which method.

## How Rules Work

Most rules, such as Lunch Rules, and the Clock Location rule will not prevent your employees from using KPME Time in any way. They are intended to establish limits, which will generate exceptions when those limits are exceeded. For instance, let's say you set a Clock Location rule requiring the employees under Work Area 1002 to clock in on a specific workstation with an IP Address of 129.29.29.1. KPME Time will not in any way stop an employee from clocking in or out at a different workstation.

The Time Collection Method rule differs from the other rules in that it impacts what options will be available for employees to record their work hours.

## Rule Hierarchy

KPME Time is flexible in that it allows you to apply different rules to different groups of employees. For instance, you might want most of your employees to clock in and out for lunch but perhaps there's a group of employees for which this choice is impractical. You'd like to establish a general rule for all employees to clock in and out for lunch yet make an exception for this particular group. To support this flexibility, rules exist in a hierarchy—where rules that are more specific override rules that are more general. Understanding how this hierarchy functions makes it easier and more efficient for you to establish rules for your department.

Most rules use the same basic criteria to identify whom a particular rule applies to. We can think of this information as being "identification criteria," information that exists to tell KPME Time who to apply the rule to. Each rule also contains criteria that identify the rule itself—indicating employees must clock in and out for lunch for example. We can think of this as "rule criteria," information that tells KPME Time what kind of rule limits to apply to the identified group.

The identification criteria used, listed from most general to most specific, are:

**Department:** The Department ID, such as PARK or BL-CHEM.

**Work Area:** The ID number for a particular Work Area, and used to identify a group of employees within a department.

**Principal ID:** The ID number that uniquely identifies a specific employee.

**Job Number:** The identifying number for an employee's job. Employees with multiple jobs will have multiple Job Numbers. You can only specify a Job Number if you have also specified an employee's Principal ID.

Rules established using more specific criteria override those using less specific criteria. Below is an example of different versions of the same rule using different identification criteria. The "%" symbol is a 'wildcard' symbol that is used in rules to indicate a selection of "ALL." We've numbered the rules so they can be identified and discussed below. The rule criteria itself is unimportant to understanding the hierarchy, so the criteria has been abstracted to simple values of "X," "Y," or "Z."

| Example # | Department ID | Work Area | Principal ID | Job Number | Rule Criteria |
|---|---|---|---|---|---|
| 1 | BA-BKST | % | % | % | X |
| 2 | BA-BKST | 0001 | % | % | Y |
| 3 | BA-BKST | 0001 | 0001234567 | % | Z |

Rule 1 indicates that all employees in the Department BA-BKST follow rule "X." The "%" symbols in all the other identification criteria fields indicate that all Work Areas, employee IDs and associated employee records apply this version of the rule. If you want to establish one version of a rule for the entire department this is a simple way to do that.

Rule 2 indicates that members of Work Area 0001 apply rule criteria "Y." This means that all employees and all employee record numbers associated with Work Area 0001 are an exception to the general rule established in example 1. Employees in this Work Area will have rule "Y" applied instead.

Rule 3 takes it one step further and says that a specific employee, identified by the employee ID number 0001234567, needs a different version of this rule applied. All this employee's jobs associated with BA-BKST Work Area 0001 will apply rule "Z."

It's unlikely that many users will need the level of flexibility provided by employee Principal ID and employee Job Number. Most users will find being able to apply rules to the Department and Work Area level are sufficient for their needs. However, the flexibility exists to make rules specific to individuals and individual jobs if necessary.

## Effective Dates

All Rules are effective dated, allowing them to be changed on specified dates while maintaining a historical record of previous rules.

The Effective Date is the date that a rule takes effect. Rules don't have an "end date" but instead end the day before a new rule takes effect.

For example, you could have two rules established as shown below.

| Effective Date | Department ID | Work Area | Principal ID | Job Number | Rule |
|---|---|---|---|---|---|
| 01/01/2011 | UA-FMOP | @ | @ | @ | A |
| 09/01/2011 | UA-FMOP | @ | @ | @ | B |

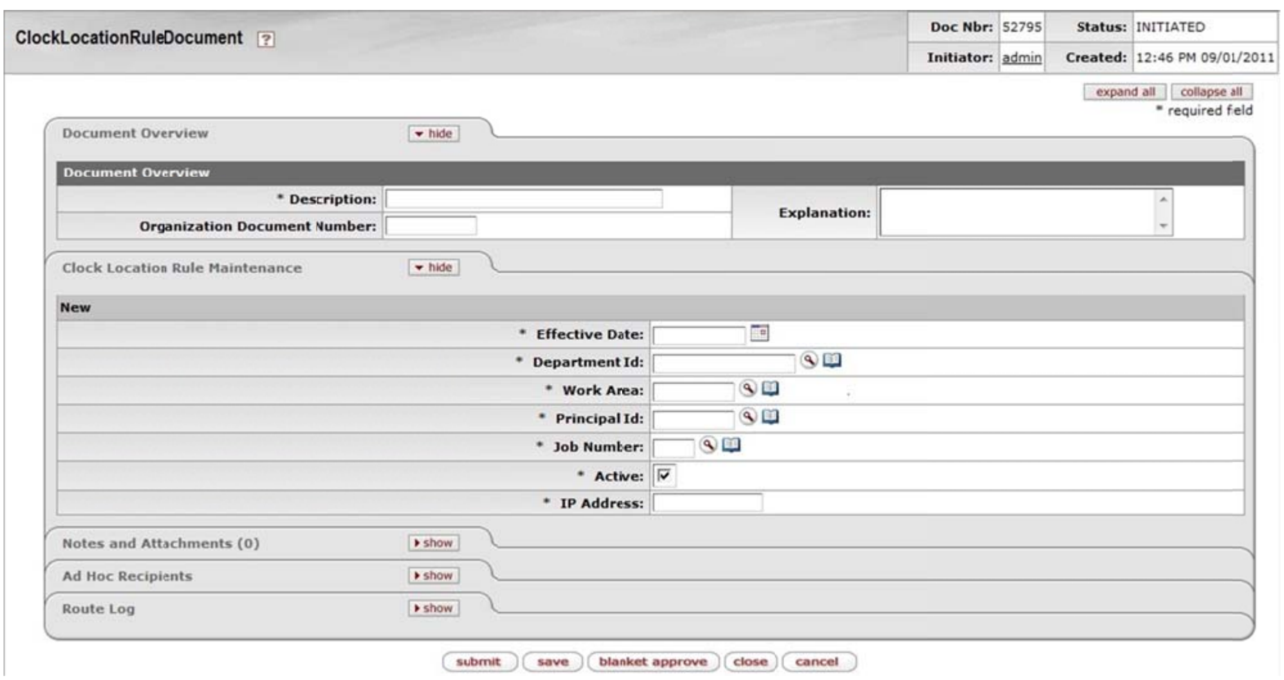
In this case, rule A would be in effect starting on January 1st, 2011 and would stay in effect through August 31st, 2011. Beginning on September 1st, 2011 rule B would take effect.

## Searching for Rules

All Departmental Rule maintenance screens will take you to a rule lookup screen. You can enter search criteria or simply click "Search" to view existing rules. It's recommended that you enter only Department ID in the search criteria if you wish to see all the rules for your particular department.

## Adding a New Rule

In the 'Rules' column, click on the name of the rule to open that specific Lookup screen. Then, click the **Create New** button at the top right of the page. This initiates a new Workflow document form where you enter the required values to add the new rule.



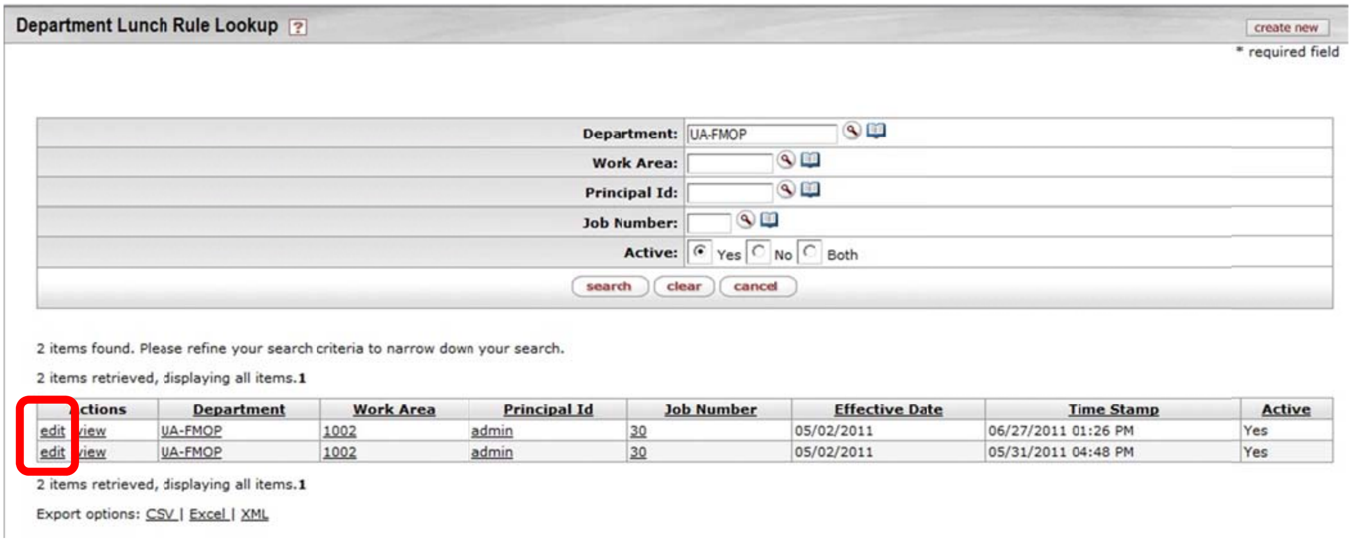

You must enter a Description at the top of each rule document, make sure the Effective Date is what you want (as that is date the new rule takes effect), verify the 'Active' checkbox is checked, and also enter or select values in all **required** fields. (Required fields are marked by an asterisk.)

When finished, click the **Submit** button, and then click **Close** to close out of the rule document.

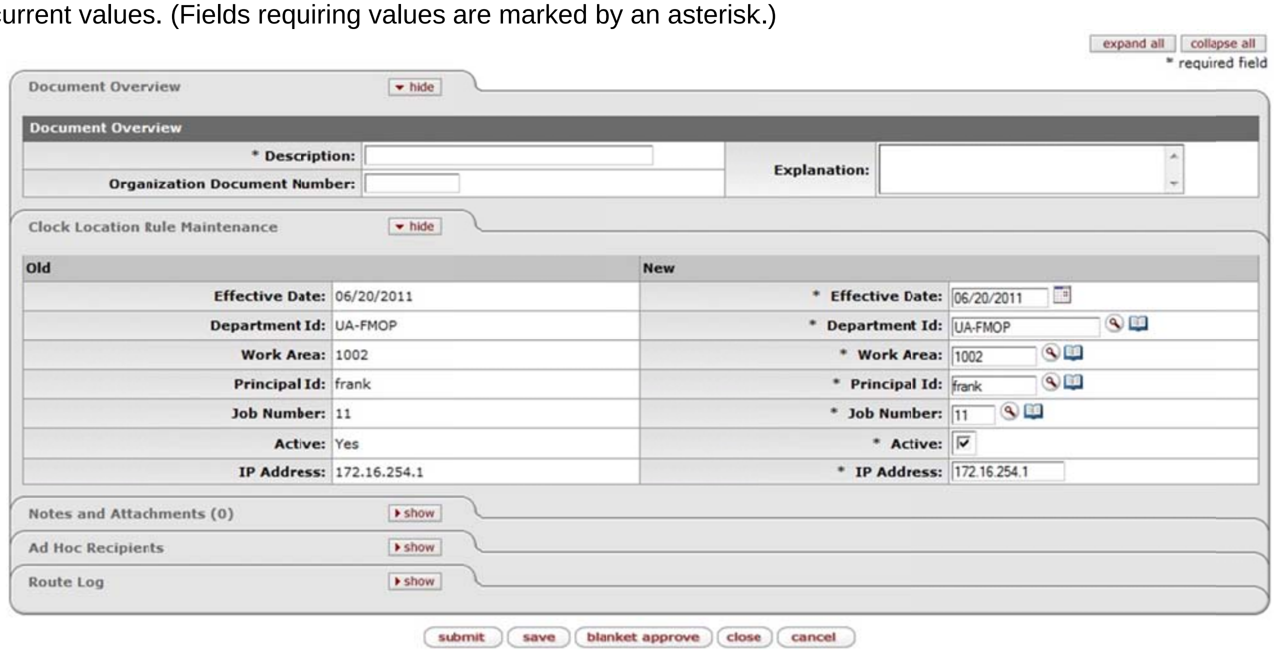
# Modifying Existing Rules

To modify an existing rule, under the ‘Rules’ column, select the rule you want by clicking on the link (underlined name of the rule), and that opens the rule Lookup screen.

Enter your search criteria to lookup the rule you want to change, and in the ‘Actions’ column, click on the **edit** link for that rule.




This opens a Workflow document form showing the **Old** values on the left. The rule form will carry over the existing values into a section called ‘**New**’ on the right side of the form and you use those fields to modify the current values. (Fields requiring values are marked by an asterisk.)




You must enter a Description at the top of each rule document, make sure the Effective Date is what you want (as that is the date the modified rule takes effect) and then update the values in any fields you need to change.

Make sure all the required fields are completed, and the “Active” box is checked, unless you are inactivating this rule. When finished, click the **Submit** button, and then click **Close** to close out of the rule document.

**Note:** To get rid of a rule you don’t want, add a new rule that supersedes it with a more recent effective date or by entering a new version of the rule with the same effective date as the current one. Each rule also contains an “active” flag. If you just want to undo a rule, establish a new version of it with this active flag unchecked. This new inactive rule will take precedence, effectively removing the former rule.

## Clock Location Rule

Use this rule to specify that you want a particular group of employees to clock in and out from a specific location. To do this, you specify the IP Address of the computer on which you want these clock actions to occur. If clock actions are entered at other machines, this rule will generate warnings on the timesheet.

***Note:*** This rule does not apply to employees who manually add hours to their timesheet.

1. On *Admin* tab, click on Clock Location Rule link.
2. On the Clock Location Rule Lookup, enter your search criteria—Department ID, Work Area, Principal ID and employee Job Number. Other lookup parameters include Effective Date From and Effective Date To.
   Remember you can use the "%" symbol in the Work Area, Principal ID, and Job Number fields as a wildcard value to indicate "ALL."
3. Click **Create New** to add a new rule, or edit to modify an existing rule.
4. Enter the document Description.
5. Enter the Effective Date on which you wish this rule to take effect.
6. Enter the Department Id for your department.
7. Enter a specific Work Area (or enter % as a wildcard value to indicate "ALL.")
8. Enter a specific Principal ID (or enter % as a wildcard value to indicate "ALL.")
9. Enter the Job Number.
10. Enter an "IP Address"—this is the IP address of the computer (or kiosk) that you wish this group of employees to clock in and out from.
11. Leave "Active" box checked as the default value, unless you want to undo a rule. In that case, when you establish a new version of a rule, leave the "active" box unchecked.
12. After you've completed your rule click "**Submit**."
13. Click "**Close**" to close out of document.

## Time Collection Rule

Use this rule to establish how employees in your department will interact with KPME Time.  Will they clock in and out (Clock Entry) or will they record their Time directly on their timesheet (Manual Entry)?  Each department establishes its own rules concerning how employees should enter their Time.

1. On *Admin* tab, click on Time Collection Rule link.
2. On the Time Collection Rule Lookup, enter your search criteria—Department ID and Work Area. The Time Collection rule is the only current rule that allows only these two lookup parameters.
   Remember you can use the "%" symbol in the Work Area field as a wildcard value to indicate "ALL."
3. Click **Create New** to add a new rule, or edit to modify an existing rule.
4. Enter the Description.
5. Enter the Effective Date on which you wish this rule to take effect.
6. Enter the Work Area (or enter % as a wildcard value to indicate "ALL.")
7. To require employees to clock in and out, check the "Clock User" box.  For Manual Entry employees, leave this box blank.
8. (Optional) if you want to allow a Clock Entry employee to distribute their hours among multiple assignments, check the "Hr Distribution" box.
9. Leave the "Active" box checked as the default value, unless you want to undo a rule. In that case, when you establish a new version of a rule, leave the "active" box unchecked.
10. After you've completed your rule click "**Submit**."
11. Click "**Close**" to close out of document.

## Department Lunch Deduction Rule

Use this rule for employees who clock in and out to determine the automatic deduction for their lunch breaks.

**Default Lunch Deduction:**  You can establish a default amount of lunch Time that is automatically deducted from the employee's work shift once they have worked the "defined" number of shift hours.

***Note:*** This rule does not apply to employees who manually add hours to their timesheet.

1. On *Admin* tab, click on Department Lunch Rule link.

2. On the Department Lunch Rule Lookup, enter your search criteria—Department ID, Work Area, Principal ID and employee Job Number.
   Remember you can use the "%" symbol in the Work Area field as a wildcard value to indicate "ALL."
3. Click **Create New** to add a new rule, or edit to modify an existing rule.
4. Enter the Description.
5. Enter the Effective Date on which you wish this rule to take effect.
6. Enter the Work Area.
7. Enter the Principal ID.
8. Enter the Job Number.
9. Enter the number of Lunch Deduction Minutes (usually 30 or 60).
10. Enter the number of Shift Hours worked before a lunch is deducted.
11. Leave "Active" box checked as the default value, unless you want to undo a rule. In that case, when you establish a new version of a rule, leave the "active" box unchecked.
12. After you've completed your rule click "**Submit**."
13. Click "**Close**" to close out of document.

# Administrative Activities

Department Administrators can use the **Work Area Maintenance** option to create new Work Areas and Tasks and manage approver roles by Work Area.

Work Areas are used to divide a Department into groups based on Approvers. Employee Time Assignments are associated with a Work Area. Approvers are also assigned by work area, therefore the work area drives routing for employee timesheets. Each Work Area can have one or more Approvers assigned to it.

Tasks are optional sub-divisions of Work Areas. Assignments in KPME Time can associate employees with a Work Area and with that Work Area's Tasks. Tasks allow departments to use increased tracking capabilities within a Work Area; for example, keeping track of the hours worked for a particular project.

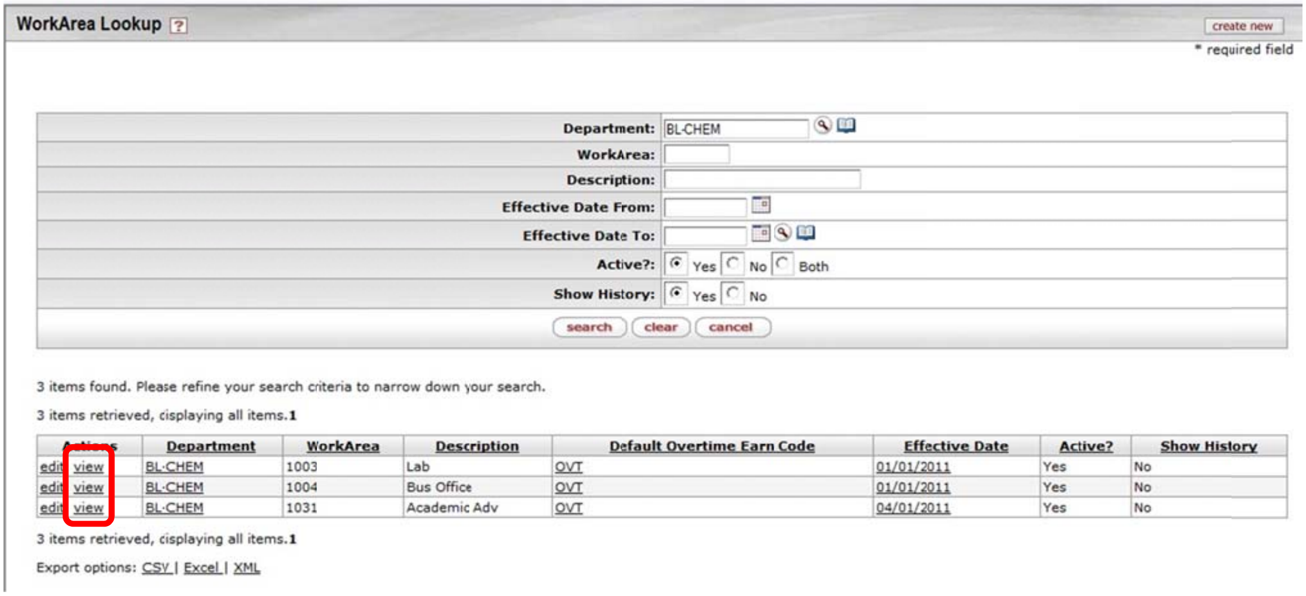
## Work Area Maintenance

Use this option to view, create or modify the Work Areas and Tasks that will exist for your Department. You can also establish the Approver and Reviewer roles to review/approve timesheets for those Work Areas.

## Viewing a Work Area

To view the details for a Work Area:

1. On *Admin* tab, click on WorkArea Maintenance link.
2. On the Work Area Maintenance Lookup, enter your search criteria—Department ID, Work Area, Description, Effective Date From or Effective Date To. Remember you can use the "%" symbol in the fields as a wildcard value to indicate "ALL." Click **Search** to find any existing rules.
3. In the search results, click **view** to view the details for that Work Area.




## Adding a new Work Area or Task

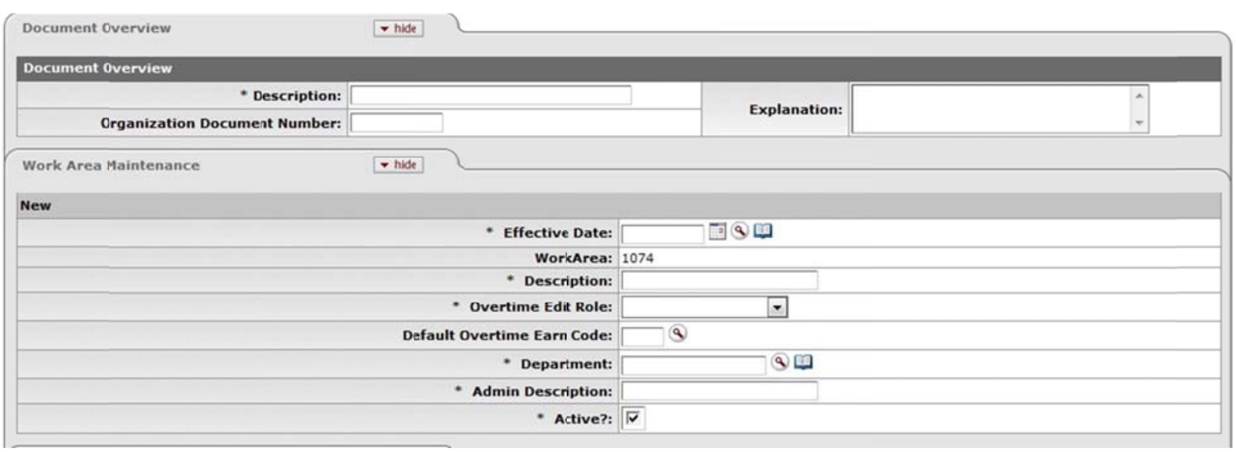
Work Area numbers are unique and assigned by the system. When creating a new work area the WA description is important because that is what the employee sees when choosing the assignment to clock into.

The "Approver" role is assigned on the Work Area maintenance document. The work area must have at least one valid approver to route a timesheet for approval.

To add a new Work Area or Task:

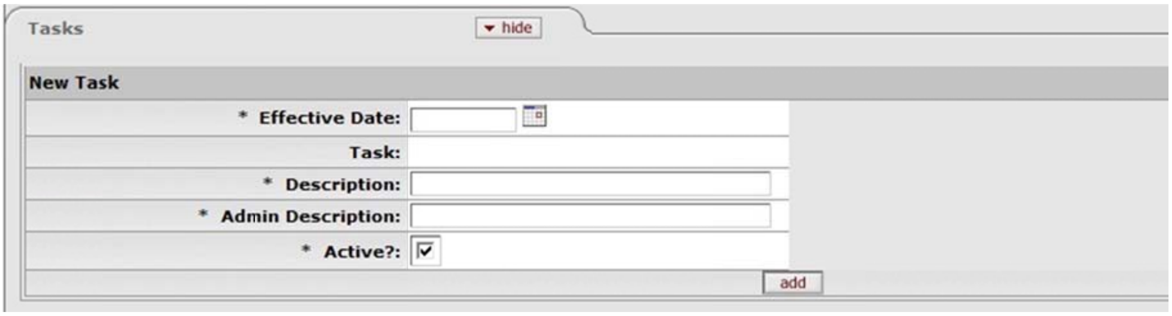
1. On *Admin* tab, click on WorkArea Maintenance link to open the Work Area Lookup.
2. Click **Create New** button to add a new rule (which opens a Work Area Maintenance document).

   Each **Work Area Maintenance** document is divided into four sub-sections: Document Overview, Work Area Maintenance, Tasks, and Roles. (**Note:** New Work Area numbers and Task numbers are automatically generated by the system.)

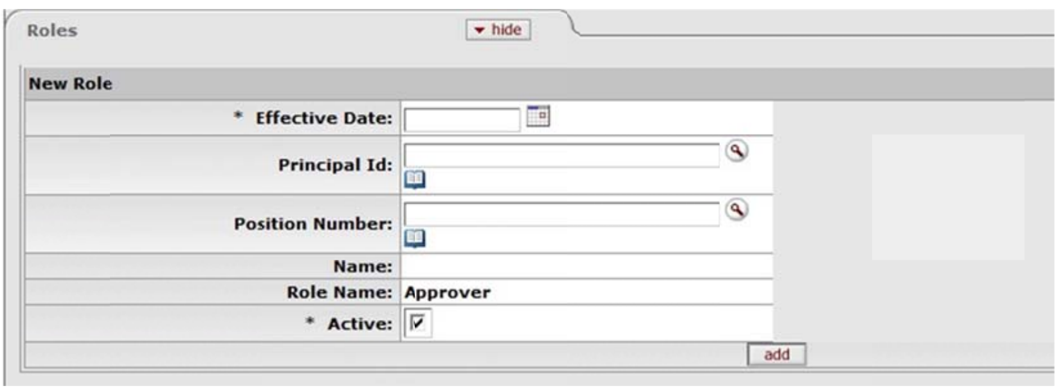



3. At top of document under 'Document Overview,' enter the document Description.
4. In the 'Work Area Maintenance' sub-section:
   a. Enter the Effective Date on which you wish this WA to be effective.
   b. Enter the Work Area Description. (This is what the employee sees when selecting this assignment to clock or enter hours.)
   c. Select Overtime Edit Role (e.g., Employee, Approver, Dept Admin). (This determines which role can change the overtime earn code.)

d. (Optional) Enter Default Overtime Earn Code (usually OVT). (You only need to do this if different than your weekly rule.)
e. Select your Department code (such as BL-RPAS or PARK)
f. Enter the work area Admin Description.
g. Leave “Active” box checked as the default value, unless you want to “inactivate” this work area.




5. (Optional) To enter a **New Task** for the work area:
   a. In the Tasks sub-section, enter the Effective Date on which you wish this task to be effective.
   b. Enter the task Description. (This is what the employee sees when selecting this assignment.)
   c. Enter the task Admin Description.
   d. Leave “Active” box checked as the default value.
   e. Click **Add**. (The system will then assign a new Task number.)
   f. Repeat the “Task” steps for each Task you wish to add.




6. To add a **New Role** for the work area:
   a. In the Roles sub-section, enter the Effective Date on which you wish this role to be effective.
   b. Enter the Principal ID of the approver you are assigning to this role.
   c. (Optional) You can enter the Position Number of this employee.
   d. Leave “Active” box checked as the default value for the role.
   e. Click **Add**.
   f. Repeat the “Role” steps for each role you wish to add.
7. After you’ve completed your work area document, click “**Submit**.”
8. Click “**Close**” to close out of document.

## Modifying an existing Work Area, Task or Approver

Use the Work Area maintenance document to modify an existing Work Area, the Tasks under that Work Area, or the Approvers you have assigned to approve timesheets for that Work Area.

To modify an existing Work Area, Tasks under that Work Area, or the Approvers for that Work Area:

1. On *Admin* tab, click on WorkArea Maintenance link.
2. On the Work Area Maintenance Lookup, enter your search criteria.
3. In the search results, click **edit** to modify an existing Work Area.

4. Modify the appropriate fields in the 'Work Area Maintenance' sub-section. Be sure to enter a document Description and to check the Effective Date. Leave "Active" box checked as the default value, unless you want to "inactivate" this Work Area.
5. You can add or modify Tasks for this Work Area:
    a. To add a **New Task**, go to the blank fields at the top left of the 'Tasks' sub-section and enter values in all required fields, then click **Add**. (The system will then assign a new Task number.)
    b. To modify an existing Task, change the appropriate fields for that Task under the '**New**' section on the right side of the 'Tasks' sub-section. (To inactivate that Task, uncheck the 'Active' box.)
6. In the 'Roles' sub-section, you can add new Approvers, or modify the role of existing Approvers for this Work Area:
    a. To add someone as an Approver, go to the **New Task** fields located at the top left of the 'Roles' section and enter values in all required fields, then click **Add**.
    b. To remove someone from the Approver role, you must inactivate that Role by unchecking the 'Active' box (located under '**New**' on the right side of the page). (The person removed will then show under the 'Inactive Roles' sub-section of the document.)
7. When finished entering your changes on the work area document, click "**Submit**."
8. Click "**Close**" to close out of document.

## Inquiries

KPME Time provides four Inquiry screens that are useful tools for looking at the Time Blocks recorded on a timesheet, the historical Time block entries on a timesheet, the clock transactions logged for an employee, or the missed clock punches for an employee.

- Use the **Time Block Inquiry** lookup screen to view the recorded Time blocks present on a particular timesheet.
- Use the **Time Block History Inquiry** lookup screen to view the history of Time blocks added, updated or deleted on a particular timesheet.
- Use the **Clock Log Inquiry** lookup screen to view the real-Time clock transactions logged on a particular timesheet, including the IP Addresses where the transaction was clocked.
- Use the **Missed Punch Inquiry** lookup screen to view any missed clock in's or clock outs for an employee.

Additional information about these inquiry pages is provided in other sections of this manual. Please see the topics entitled, "Time Block Inquiry, Time Block History Inquiry, Clock Log Inquiry and Missed Punch Inquiry."

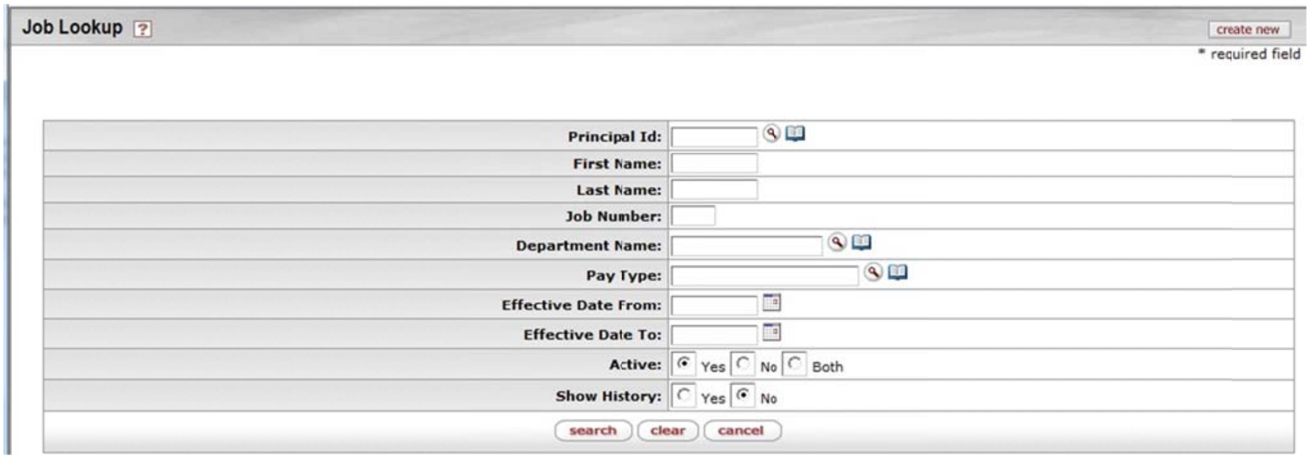
# Adding Employees to KPME Time

This section explains the maintenance screens available to hire an employee into a Job, and to add, modify or remove an employee from a Time Assignment in KPME Time

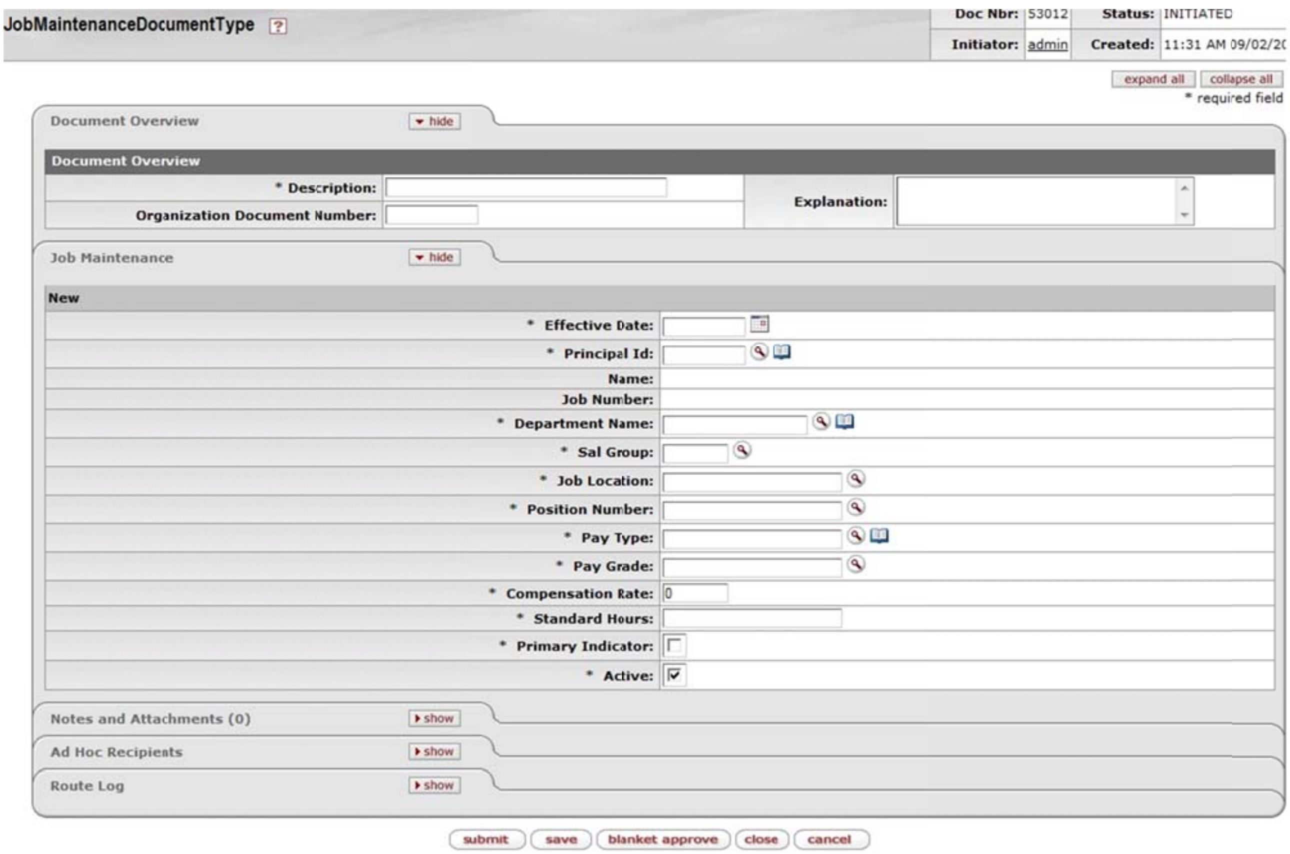
## Hiring an Employee

You can use the **Job Maintenance** document to hire an employee into an active job in the system. A single person may have multiple jobs and each job can have only one pay rate. Each job can have one or many assignments (work areas + tasks) for which they will be able to record their Time. Each job for a given employee is assigned a unique job number. Other attributes on the job maintenance page are used to determine which rules to apply. These attributes can be mapped to an existing payroll/HR system.

1. On the *Admin* tab, under Administrative Activities, click on the Job link to open the **Job Lookup** page.




2. Click **Create New** button.  This initiates the **Job Maintenance** document form.




3. At top of document under 'Document Overview,' enter the document Description.
4. Enter the Effective Date on which you wish this hire to be effective.
5. Enter the Principal ID of the person you are hiring into this job.
6. Enter or select the Department Name.
7. Select the Salary Group from the lookup.
8. Enter the Job Location.
9. Select the Position Number from the lookup.
10. Select the Pay Type from the lookup.
11. Select the Pay Grade from the lookup.
12. Enter the Compensation Rate.
13. Enter the Standard Hours.  (If none, enter '0')
14. If this is the employee's primary job, check the Primary Indicator box. (An employee can only have one primary job).
15. Leave "Active" box checked as the default value.

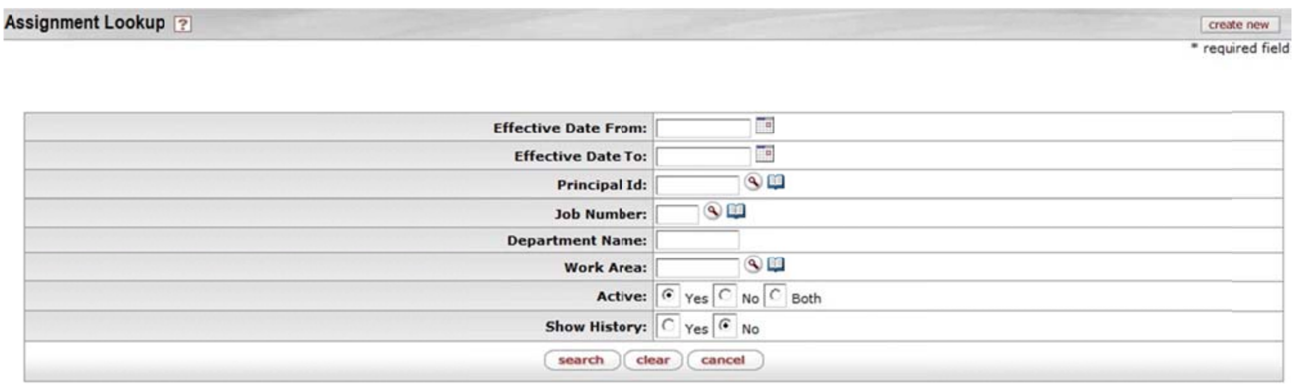
16. After you've completed your Job hire document, click "**Submit**."
17. Click "**Close**" to close out of document.

## Adding a Time Assignment

You can use the **Assignment** maintenance document to define the assignment and funding attributes for a given employees' job record.  It allows you to create, modify or remove a Time Assignment for an employee.

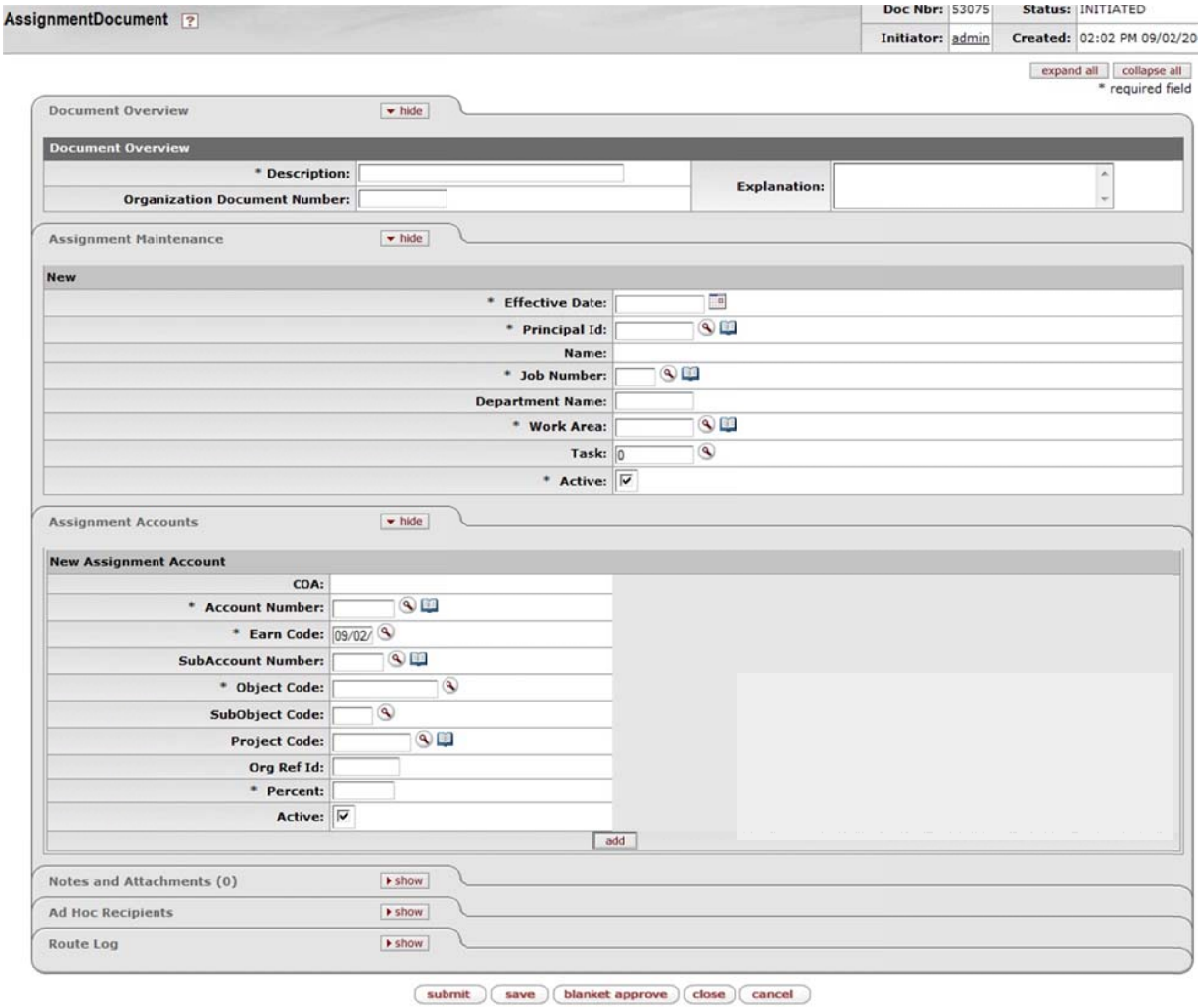
An employee can be given one or many assignments and the funding per assignment must total to 100%. Multiple assignments can be used when the employee reports to different Time Approvers, or when different accounts should be charged based on the work done. The employee records the hours against assignments. An assignment is a unique combination of job, job number, work area and/or task.

1. On the *Admin* tab, under Administrative Activities, click on the Assignment link to open the **Assignment Lookup** page.




2. Click the **Create New** button to add a new Assignment (which initiates the Assignment document).

   Each **Assignment** document is divided into three sub-sections: Document Overview, Assignment Maintenance, and Assignment Accounts.




3. At top of document under Document Overview, enter the document Description.
4. In the 'Assignment Maintenance' sub-section, enter the information to add the assignment:
   a. Enter the Effective Date that you wish this assignment to be effective.
   b. Enter the Principal ID of the employee you are adding to this assignment. (This fills-in the Name.)
   c. Select the Job Number from the lookup.
   d. Enter the Department Name.
   e. Select the Work Area from the lookup.
   f. (Optional) If applicable, enter or select the Task from the lookup.
   g. Leave "Active" box checked as the default value
5. In the 'Assignment Accounts' sub-section, enter the account information to fund this assignment:
   a. Select the Account Number from the lookup.
   b. Select the Earn Code from the lookup. (You must define the 'regular earn code' for the job.)
   c. Select the Object Code from the lookup.
   d. Enter the Percent. (100 is maximum allowed value, but total of ALL Accounts added must equal 100%)
   e. Click **Add** button to add the account funding.
   f. Repeat the 'Assignment Account' steps for each Account you need to add.
6. After you've completed your Assignment document, click "**Submit**."
7. Click "**Close**" to close out of document.

## Modifying a Time Assignment

You can use the **Assignment** maintenance document to modify the current Assignment for an employee. You can change the Work Area or Task, add or remove Accounts that fund the Assignment, or change the Percentage of each Account that funds it.

1. On the *Admin* tab, click on the Assignment link.
2. On the Assignment Lookup, enter your search criteria. In the search results, click edit to modify an existing Assignment
3. Enter a document Description.
4. You can modify the Work Area or a Task assigned under this Work Area:
    a. To modify the Work Area, go to '**New**' on the right side of the 'Assignment Maintenances' sub-section and select a **New Work Area**.
    b. To add or modify the Task assigned under the current Work Area, select a **New Task** number.
    c. Be sure to check the Effective Date, as that is the date when the Assignment will change on the employee's timesheet.
    d. Leave "Active" box checked as the default value, unless you want to "inactivate" this Assignment.
5. You can add or remove the Accounts funding this Assignment:
    a. To add a **New Assignment Account**, go to the blank fields at the top left of the 'Assignment Account' sub-section and enter values in all the required fields, then click **Add**.
    b. To remove an existing Account, uncheck the 'Active' box. (That keeps it from being used to fund this assignment.)
6. You can also reallocate your funding, and change the **Percent** for each Account (as long as ALL accounts total 100%).
7. After you've completed modifying your Assignment document, click "**Submit**."
8. Click "**Close**" to close out of document.

## Removing a Time Assignment

You can use the **Assignment** maintenance document to "inactivate" an employee's Time Assignment and that will remove it from the employee's timesheet.

If you inactivate all Time Assignments for an employee, they are no longer in KPME Time and the system will not generate timesheets for them.

1. On the *Admin* tab, click on the Assignment link.
2. On the **Assignment** Lookup, enter your search criteria to find the Assignment you want to remove.
3. In the search results, click **edit** to modify that Assignment. This initiates a new Assignment maintenance document which shows the current assignment and funding information for that Assignment.
4. Enter a document Description.
5. Enter the Effective Date when you want this Assignment to no longer be active.
6. Under the 'Assignment Maintenance' sub-section, uncheck the 'Active' box.
7. Click "**Submit**" to submit the document.
8. Click "**Close**" to close out of document.