KPME v2.0
User Guide
Time and Attendance
Leave Management

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The Kuali Foundation

Revision History

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1.0	**Sept. 2011**		**Version 1.0**
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Introduction to KPME

What is KPME?

KPME is an open source, Comprehensive HR/Payroll system built for Higher Ed, By Higher Ed. The KPME roadmap can be found at: http://kuali.org/kpme. The first KPME module release was Time and Attendance and the latest release is Leave Management that includes integration with Time and Attendance. KPME modules handle multiple jobs, pay types, and pay cycles based on employee's active appointment in your department. The system also provides approval routing based on jobs so your designated approvers can view and approve employee timesheets and leave online.

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 also calculates all special rates of pay such as overtime, shift differential, premium, and holiday pay.

What is KPME Leave Management?

KPME Leave Management also provides a 24/7 electronic leave management system for organizations and their employees to accrue, request, report and track the use of benefit time (eg. Vacation, Sick) for exempt and non-exempt faculty and staff.

Why is it used?

The primary purposes of the timekeeping and leave management 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 and leave 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 time worked and/or leave. The system supports hourly and flat-rate employees which allow it to handle uncommon pay conditions. Employees also use KPME to record leave usage such as days off when sick or on vacation and request future planned leave.
- **Approvers** use KPME to review, edit, and approve the hours worked their employees have recorded and/or leave reporting calendars. Approvers can also approved leave requested submitted by their employees.
- **Reviewers** are KPME users who have the same 'view and edit' timesheet options as Approvers but are unable to approve timesheets or leave calendars.
- **Department Administrators** are able to access the administrative or HR/Payroll functions in KPME allowing them to create Work Areas, add approvers for approval routing, and change the rules in their department.
- **System and Location Administrators** 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's Timekeeping and Leave Management is available 24 hours, 7 days a week, and 365 days a year for employees to record hours worked and report leave and for approvers to process timesheet approvals.

How does it work?

KPME is a web-based application and can be accessed from any network-connected device with a web browser. Non-exempt employees will log into the KPME Time central portal which provides access to timesheets for either clock entry or manual entry of hours worked. Non-exempt employees with leave benefits will also have access to a leave calendar to plan and request leave along with accessing their accrual balances. Exempt employees will log into KPME Leave Management to access their leave calendar with accrual balances to plan, request, and report leave time.

A department must first create **Work Areas** in KPME to control the Approval Routing and to set up **Assignments** that the employee uses to record work hours and leave time. KPME 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	**Organization:** DP-BOOK
Work Area: Cashier	**Work Area:** Warehouse
Approver: John Doe	**Approver:** Sally Farnsworth
Employees: Daniel Smith Ramona Sinclair	**Employees:** Ray Johnson Daniel Smith

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

Employees can have many different Assignments and can even have multiple Assignments associated with the same job. Non-exempt 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 taken during a pay or leave calendar.

The timesheet or leave calendar at the end of each period 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 and/or leave taken for their specific Work Area. Once the Approver has reviewed and approved all of the work and leave hours, the timesheet or leave calendar 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 role in that Work Area. The same is true for Sally.

After all timesheet approvals are recorded, the hours for that employee can be 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

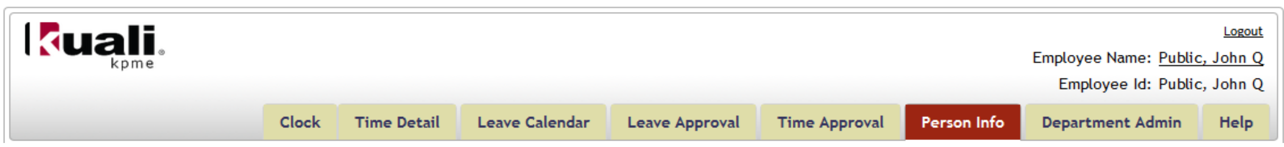
Workstations must run Windows 7, XP or Vista with Internet Explorer version 5.5 Service Pack 2 or newer. KPME also functions with other operating systems and browsers such as Mozilla Firefox and Google Chrome.

Logging in to KPME

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

In KPME 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 to add work 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 Administrator, and explains what each role can see and do using the system tabs.

KPME 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 Calendar:** Employees can use this tab to view an employee's leave balances, plan and request leave. Exempt employees will use this tab to report and submit leave usage.
- **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.
- **Leave Calendar:** View-Only users use this tab to view leave calendars but do not have any editing capabilities.
- **Department Admin:** View-Only users can view only global, location, or departmental rules depending on their level of access.
- **Person Info:** Available to all users. Displays job, assignment and role information for the selected employee.
- **Help:** Displays information to help employees, approvers and reviewers use the system.

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 Calendar:** Approvers and administrators can use this tab to approve an employee's leave calendar usage and view leave balances.

- **Time Approval:** Approvers use this tab to review and approve all timesheets for their employees.
- **Leave Approval:** Approvers use this tab to review and approve all leave calendars for their employees and also access leave requests waiting for their approval.
- **Department Admin:** Approvers are only allowed to “view” the rules or maintenance pages that impact 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 Calendar:** Reviewers can use this tab to verify an employee’s leave balances and ensure 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:** Department Admins can use this tab to clock an employee out if they missed their last clock out.
- **Time Detail:** Department Admins can use this tab to enter time block adjustments to an employee’s timesheet.
- **Leave Calendar:** Department Admins can use this tab to verify an employee’s leave balances and ensure usage is correct.
- **Department Admin:** Department Admins can access departmental maintenance and rules pages so they can define attributes associated with their departments, work areas, and employees.
- **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 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 Calendar:** Administrators can use this tab to verify an employee’s leave balances and ensure usage is correct.
- **Department Admin:** Administrators can access all the system maintenance and rules pages to define attributes associated with employees, work areas, departments and system-level settings.
- **Batch Job:** Administrators use this tab to run various batch jobs.
- **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.
- **KPME Home**: System administrations can use the Rice Portal’s Maintenance tab to access all the system maintenance and rules pages.

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

Employee Options

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

Timesheets

Non-exempt employee in KPME 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 assignments during the pay period will have timesheets created automatically 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 Administrator who can use the timesheet Create maintenance document to do so. Please contact your Department Administrator or System Administrator 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 in/out 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.

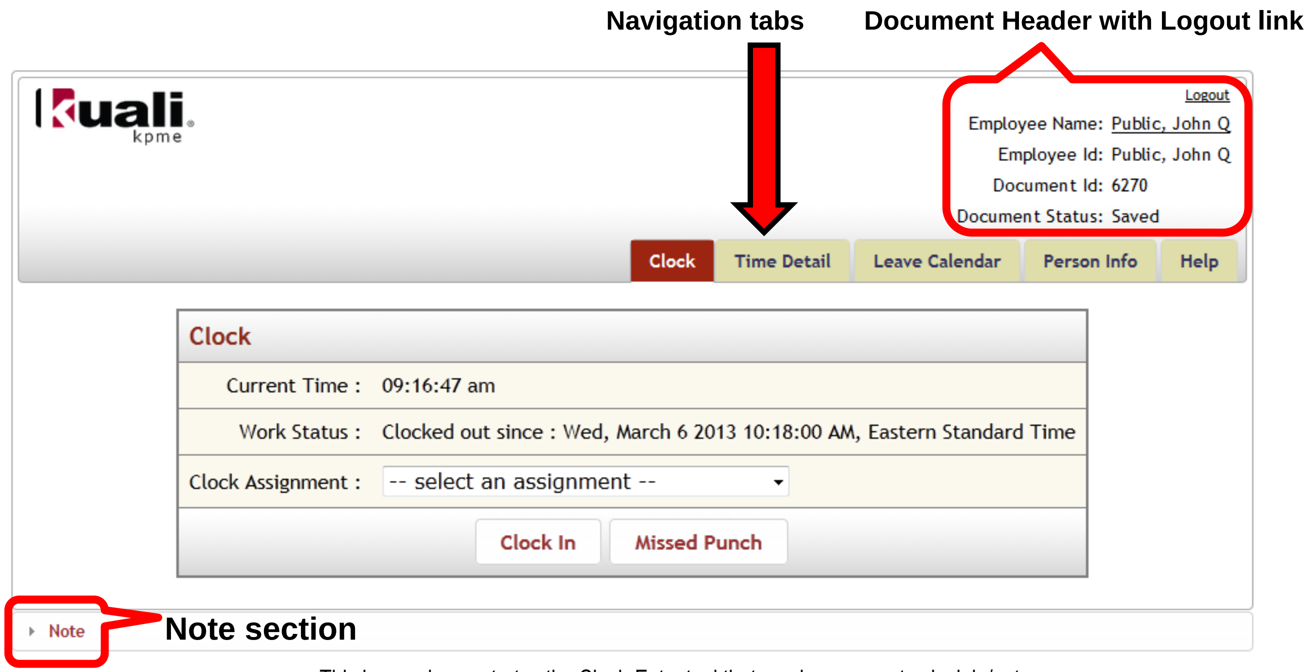
Timesheet Overview and Navigation

When you open a timesheet, it shows side by side **Navigation tabs** that you can use to navigate from page to page. These tabs show where you are and where you can go within the timesheet.

To navigate to any other page in your timesheet, just click on that tab.

- 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. This tab also provides a **Note** section, so you can add a note to your timesheet. (See *Clock* tab illustration below.)

- If you are an employee with a **Manual-Entry** assignment, your timesheet will open on the *Time Detail* tab, where you manually add the time blocks you have worked or the leave hours you have taken.



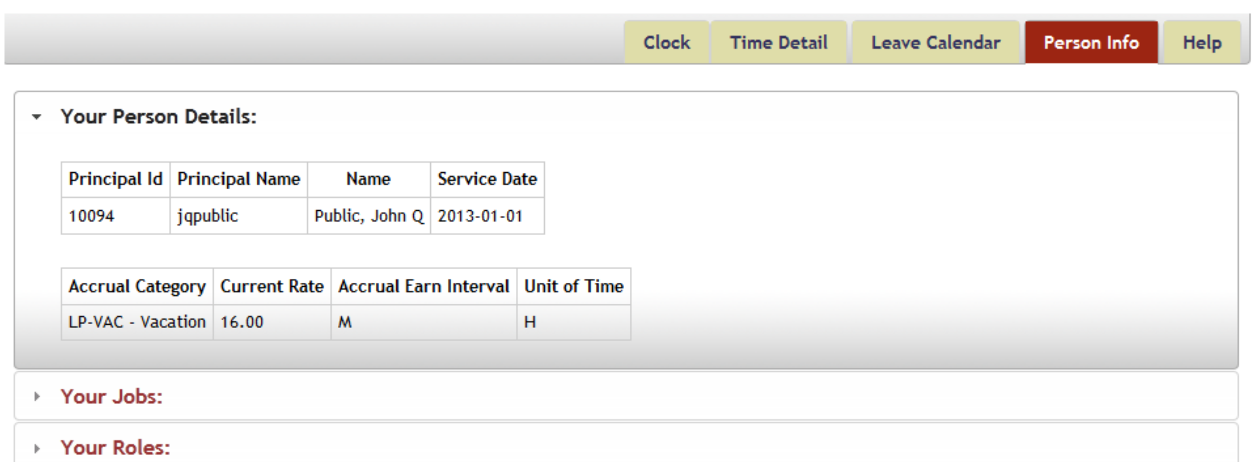
This image demonstrates the Clock-Entry tool that employees use to clock in/out.

Other navigational tabs you may see on your timesheet include the *Time Detail* tab, the *Leave Calendar* tab, *Person Info* tab and the *Help tab*. If you are an employee who is also an approver for a Work Area, you may also see a *Time Approval* and/or a *Leave Approval* tabs.

All timesheets display a "**Document Header**" in the top right corner that includes your identifying information, such as Employee Name, Employee Id, (timesheet) Document Id, and Document status (Saved, Enroute, or Final).

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 underlined Employee Name here, it will open the *Person Info* tab, where you can view details about your time assignments, jobs, and roles. Or you can click on the *Person Info* tab to open the same page.



Let's take a closer look at the *Time Detail* tab. (See *Time Detail* tab illustration on next page.)
All employees (whether **Clock-Entry** or **Manual-Entry**) will have the *Time Detail* tab which opens a calendar view of the pay period covered by the timesheet. (A pay period can be weekly, biweekly, bimonthly or monthly, depending how your organization wishes to define it.)

Clock-Entry employees will use this tab to review the time blocks they have clocked on the timesheet and to manually enter any leave hours, such as sick, vacation or PTO they took during the pay period.

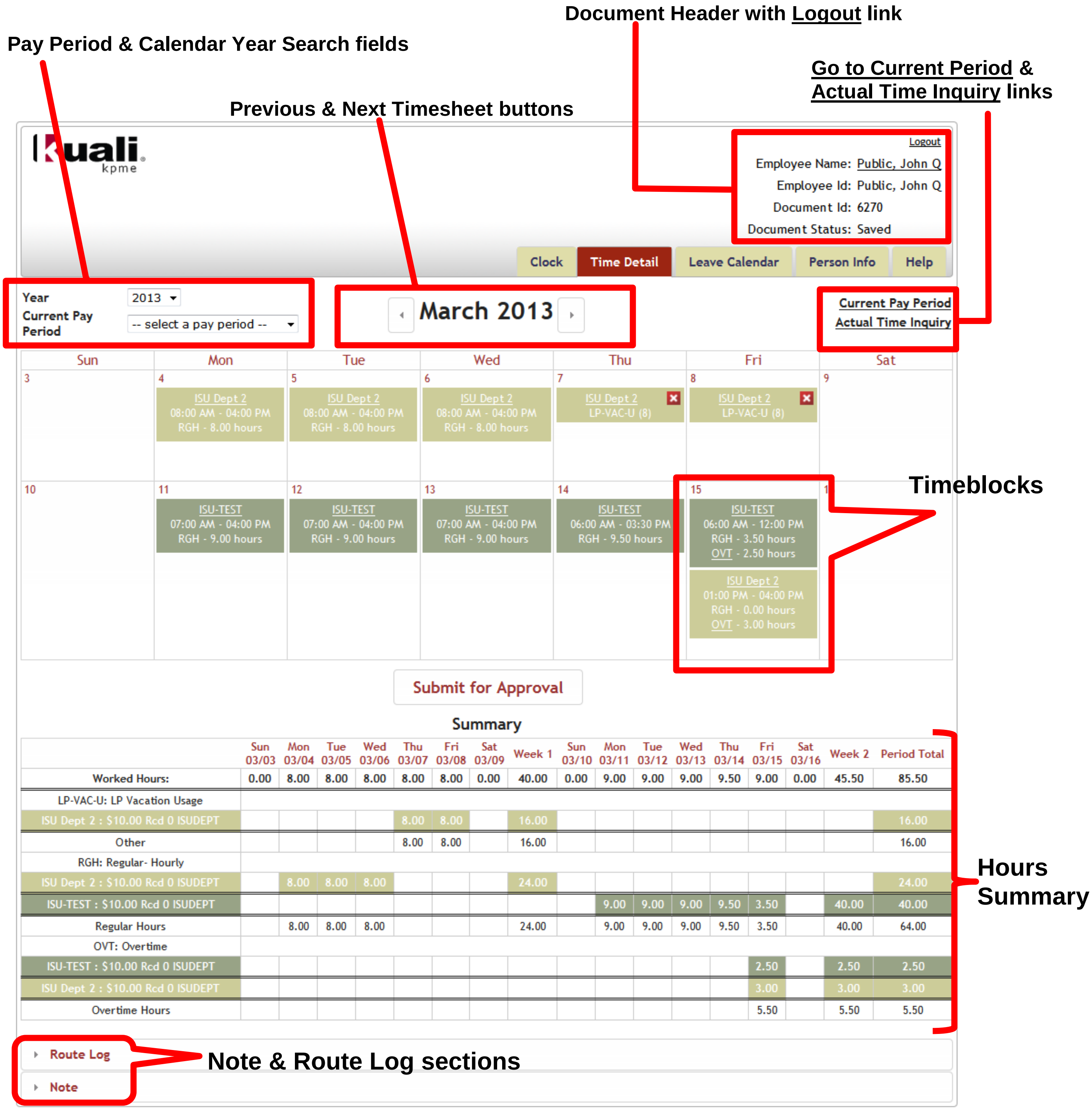
Manual-Entry employees will use this tab to manually add time blocks for the hours they have worked and the leave hours they have taken during the pay period.

There are **Previous** and **Next** arrow buttons located on each side of the Pay Period heading that allows you to scroll back and forth by pay period, in chronological order, and view a previously approved timesheet or to go forward to the next timesheet (in the order).

This tab also provides two dropdown search fields, **Calendar Year** and **Pay Period** where if you jointly select the year and pay period, it jumps to the selected timesheet, so you can view it.

Once you open any previous timesheet, the **Go to Current Period** link will appear on the page, and serves as a "shortcut" you can click to return to your timesheet for the current pay period.

Also, **Clock-Entry** employees can click the **Actual Time inquiry** link to view a list of their actual clock times.



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.

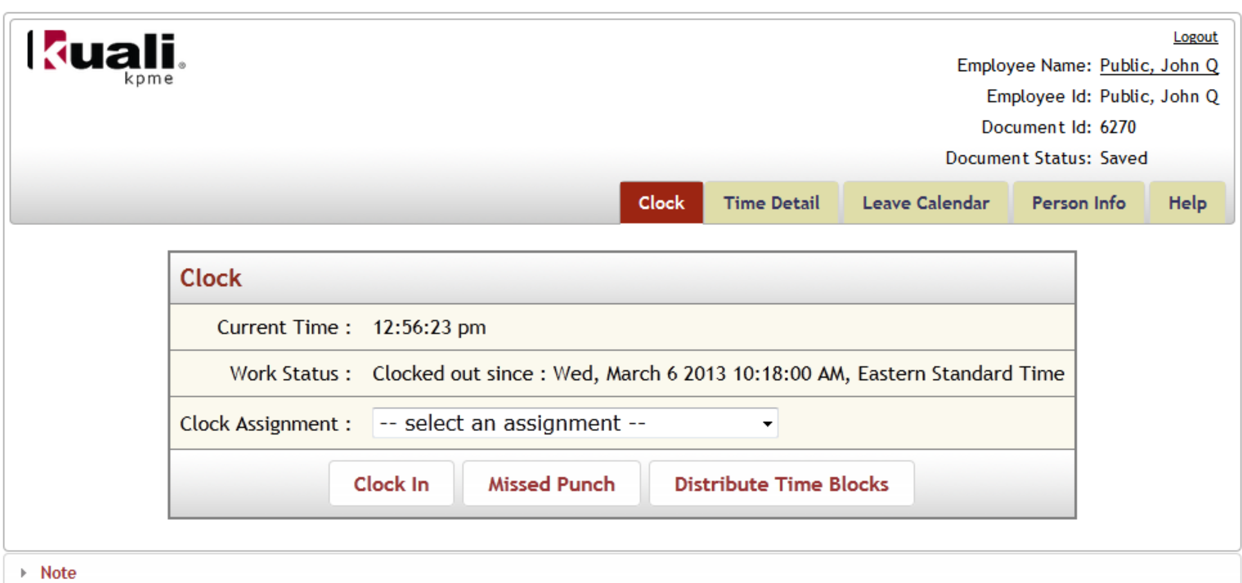
An Earn Code is a classification of earning that represents the hours worked or some special earning like shift time, sick time or overtime. An Assignment is a unique combination of your Job, Job Number, and Work Area (and Task), and is used to record the hours that you work.

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.

If you click on the *Leave Calendar* tab, you see leave recorded on the timesheet. When you scroll forward to future calendars, leave blocks can be added similar to time detail that will be used to plan and request time off.

Clock-Entry Timekeeping

Employees with **Clock-Entry** assignments 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 "Current Time" field shows you the current clock time.

The "Work Status" 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 "Clock Assignment" 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.

If you forgot to clock in or clock out, the **Missed Punch** button allows you to submit a missed punch document to notify your approver or supervisor and record the "missed punch" on your timesheet.

The optional **Distribute Time Blocks** button, when present, allows you to clock in and out of a single assignment to create one time block and then distribute those hours at the end of your shift to multiple assignments.

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

The **Logout** link (located with the "**Document Header**" in the upper-right hand corner of the page) allows you to log out of the system and close your timesheet.

How to Record Hours (on the Clock tab)

On the *Clock* tab, you will use the clock-buttons to clock in and out. This tab also allows you to submit a Missed Punch document if you missed a clock in, lunch out, lunch in, or clock out; to add a Note to your timesheet; and (if applicable) to distribute work hours clocked on one assignment over several assignments.

Clocking In and Out

To clock in:

1. Log into KPME Time. (Timesheet opens on the *Clock* tab.)
2. In the Clock Assignment 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:

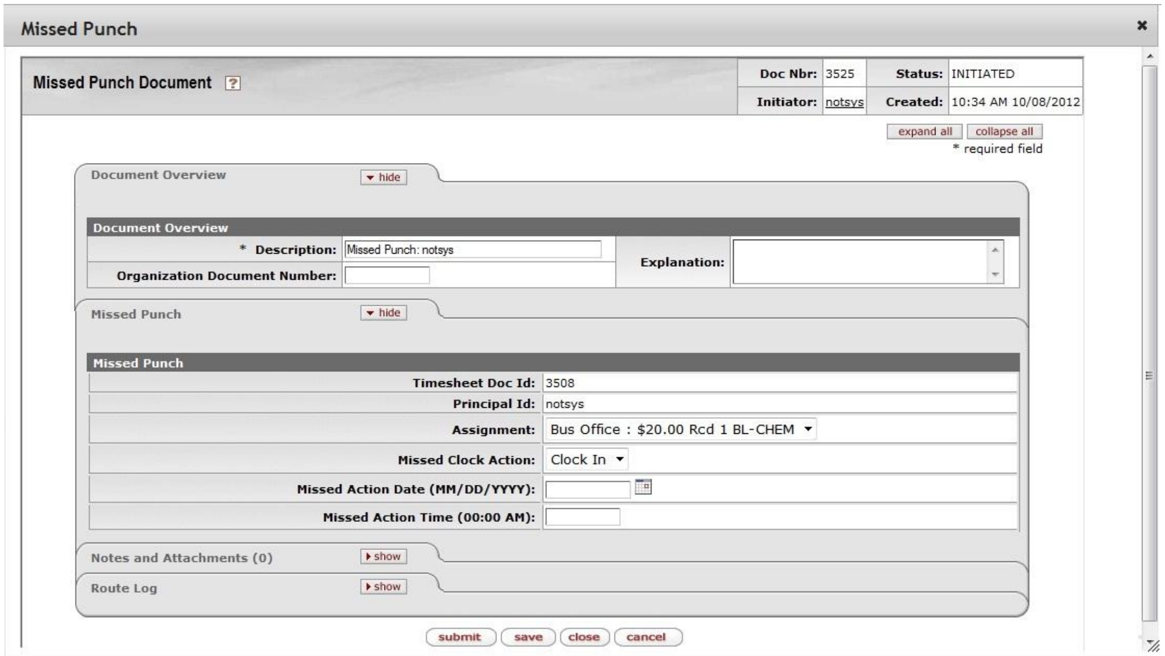
1. Log into KPME Time and click on **Clock Out** button. (Work Status will then change to show you are clocked out.)

Adding a Missed Punch

If you missed your last clock action, you can click on the **Missed Punch** button to add that missed clock in, lunch out, return from lunch, or clock out to your timesheet.

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.



Only submit a Missed Punch document if you missed your last clock action.

 **Warning!** ***Employees can only submit one Missed Punch document per (work shift) Time Block.***

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. (and inserts your timesheet Document ID and your Principal ID).
3. Select the Assignment where you missed clocking in or out. (If you only have one Assignment, the field will default to that value.)
   Note: The Missed Clock Action field will default to the clock punch that you missed, (i.e., 'clock out' if you missed clocking out, or 'lunch in' if you missed clocking your return from lunch).
4. Enter the date of your missed clock punch into the Missed Action Date field. The Date format to use is: MM/DD/YYYY. You can type in the date or select it using the calendar button, located with each date field.
5. Enter the time (then enter a space followed by AM or PM) of your missed clock punch into the Missed Action Time field. The format to use is: **hh:mm AM/PM (i.e., 10:54 AM or 9:06 PM)**
6. Click **Submit** to enter the missed punch on your timesheet.
7. Click **Close** to close out of the document.

Time Detail Tab

The *Time Detail* tab is visible to all employees. As a **Clock-Entry** employee, you will use this tab to view the time blocks clocked on your timesheet, to add time blocks that record any leave hours you are taking, and to correct (the assignment for) a time block that was accidently clocked on the wrong assignment.

You can also use this tab to view a summary of your worked hours, to add a timesheet Note, to view the Route Log to see who approves your timesheet, and, if applicable, to view any automatic meal deductions that were subtracted.

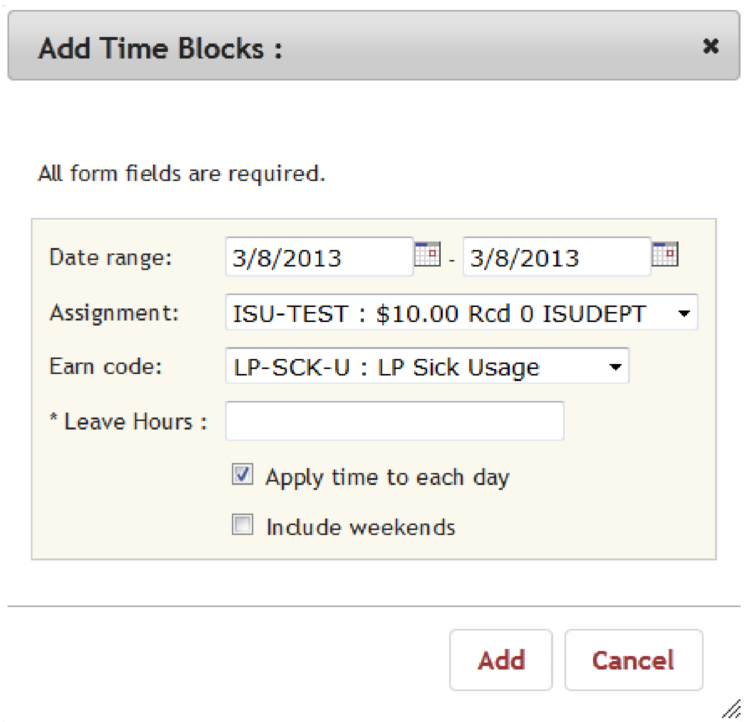
Adding Leave Hours to a Timesheet

Any employee (whether **Clock-Entry** or **Manual-Entry**) who qualifies to accrue benefit Leave Hours such as paid time-off (PTO), vacation (VAC) or sick hours (SCK) will use the *Time Detail* tab to enter those hours for the current pay period. Future leave hours can be requested from the Leave Calendar tab reviewed later in this section.

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 change to display an 'Hours' input field (instead of the usual In/Out fields.

To enter leave hours on your timesheet:

1. Log into KPME Time (and go to the *Time Detail* tab.)
2. On the timesheet pay period calendar, select the day or date range on which you want to add leave hours. This will open the 'Add Time Blocks' entry box:
    - To add leave hours for one single day, click on the day you want to add.
    - To add the same number of leave hours on multiple days, go to the first day you are taking leave in the calendar, and simultaneously **click and hold down your (left) mouse button** and drag the cursor across the days you will be out, and then release the button. (For example, click and hold on Monday, drag cursor across to Friday, and release it, and that will enter a date range of Monday through Friday.)
    - You can also type in or select a range of dates in the Date Range fields on the 'Add Time Blocks' entry box to enter the same number of leave hours on each day. If you type in the dates, use this format: M/D/YYYY (e.g. 2/4/2012 or 10/22/2012)



3. Select the Earn Code for the type of leave you are taking, such as SCK (sick), PTO, VAC (vacation), etc.
4. In the Hours field, enter the number of leave hours you are taking.
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 that the time block(s) for your leave hours are correct on your timesheet.

Example of a 'Leave' time block.

Shows the Assignment, Earn Code that describes the type of leave (i.e., sick), and number of "Hours" of leave taken.

This image demonstrates how a 'Leave' time block will appear on a timesheet.

Editing Leave Hours on a Timesheet

To **edit** a leave time block:

1. Click on the underlined Assignment name (in the example shown above, you would click on 'Cust Serv Desk').
2. This reopens the 'Add Time Blocks' entry box and you can modify the Date Range, the Earn Code (VAC, PTO, SCK, CPT, etc.) or the number of Hours of leave you are taking.
3. When finished, click **Update** and verify that the time block(s) are correct on your timesheet.

Deleting Leave Hours from a Timesheet

1. To **delete** a leave time block from a timesheet, click on the red 'X' button, in the upper right-hand corner of the time block. (See Leave time block example above).
2. When asked to confirm the deletion, click **OK** to delete it.

Correcting a Time Block Clocked on the Wrong Job/Assignment

If you clock in on one job assignment, and find that you have clocked-in on the wrong assignment, you should continue to work and clock out at the end of your work period. That will record a Time Block for that assignment.

During the current pay period only, you can change the assignment for a Time Block you clocked and recorded under the wrong assignment so it shows for the assignment you actually worked.

To move a clocked Time Block (and the hours worked) over to the correct Assignment:

1. Go to the *Time Detail* tab on your timesheet.
2. Find the time block you need to change.
3. Click on the underlined Assignment link in that time block (which opens the 'Add Time Block' entry box).
4. In the Assignment dropdown, select the assignment that you actually worked.
5. Click **Update**.

This will update your timesheet so that Time Block (and the work hours) will show under the Assignment that you actually worked.

Viewing Recorded Time Blocks on your Pay Period Calendar

Click on the *Time Detail* tab to open the Pay Period calendar and view the current pay period. (See the illustration of the Calendar under the section, "Timesheet Overview and Navigation.")

This tab displays all the time blocks you have clocked, or manually entered, such as time blocks you added to record any leave hours that you took during the pay period. If 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** buttons next to the pay period dates, that allow you to scroll back and forth to view your previous timesheets. A **Document Header** includes your Name, Employee Id, and the Document Id of the timesheet.

Viewing a Summary of Worked Hours

Below the calendar is a section showing a **Summary** of the hours that you have recorded on your timesheet. This section shows you the total 'Worked Hours' for each day along with a breakdown of the hours you worked by assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a weekly total, FLSA total and period total.

Summary

	Sun 03/03	Mon 03/04	Tue 03/05	Wed 03/06	Thu 03/07	Fri 03/08	Sat 03/09	Week 1	Sun 03/10	Mon 03/11	Tue 03/12	Wed 03/13	Thu 03/14	Fri 03/15	Sat 03/16	Week 2	Period Total
Worked Hours:	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00	0.00	9.00	9.00	9.00	9.50	9.00	0.00	45.50	85.50
LP-VAC-U: LP Vacation Usage																	
ISU Dept 2 : $10.00 Rcd 0 ISUDEPT					8.00	8.00		16.00									16.00
Other					8.00	8.00		16.00									16.00
RGH: Regular- Hourly																	
ISU Dept 2 : $10.00 Rcd 0 ISUDEPT		8.00	8.00	8.00				24.00									24.00
ISU-TEST : $10.00 Rcd 0 ISUDEPT										9.00	9.00	9.00	9.50	3.50		40.00	40.00
Regular Hours		8.00	8.00	8.00				24.00		9.00	9.00	9.00	9.50	3.50		40.00	64.00
OVT: Overtime																	
ISU-TEST : $10.00 Rcd 0 ISUDEPT														2.50		2.50	2.50
ISU Dept 2 : $10.00 Rcd 0 ISUDEPT														3.00		3.00	3.00
Overtime Hours														5.50		5.50	5.50

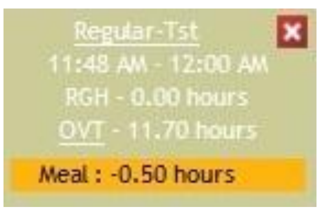
An earn code is a classification of earnings that represents regular hours worked or special type of earnings like sick time, shift or premium pay.

Regular hours that contribute toward weekly overtime eligibility are totaled and displayed. Sick or Vacation/PTO 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.

Viewing (and Correcting) Automatic Lunch/Meal Deductions

Some departments set up automatic lunch deduction rules for Clock-Entry employees. In those departments, all employees have to do is clock in and clock out (and work the required minimum number of hours), and the timesheet will automatically deduct the meal (whether breakfast, lunch, or dinner), usually 30 minutes (0.50 hours) or 60 minutes (1 hour).

Timesheets will show the amount of time deducted for a meal, highlighted in a yellow bar, at the bottom of a clocked time block.



Example of a ‘clocked’ time block that shows an automatic lunch/meal deduction.

This image demonstrates how the automatic lunch/meal deduction will appear to employees on a timesheet.

If an employee works through a scheduled meal or skips it for some reason, the timesheet may still show that a meal was deducted on that day.

If you are a Clock-Entry employee and work through or skip your scheduled meal break (with departmental approval), and a meal was deducted on that day, please notify your supervisor to correct your timesheet.

Distributing Work Hours

Some employees will have the option to clock in and out of a single Assignment and then click on the **Distribute Time Blocks** button (on the *Clock* tab) to distribute those worked hours between two or more assignments.

Note: You can also open the Note section when working in these screens to add a note to your timesheet.

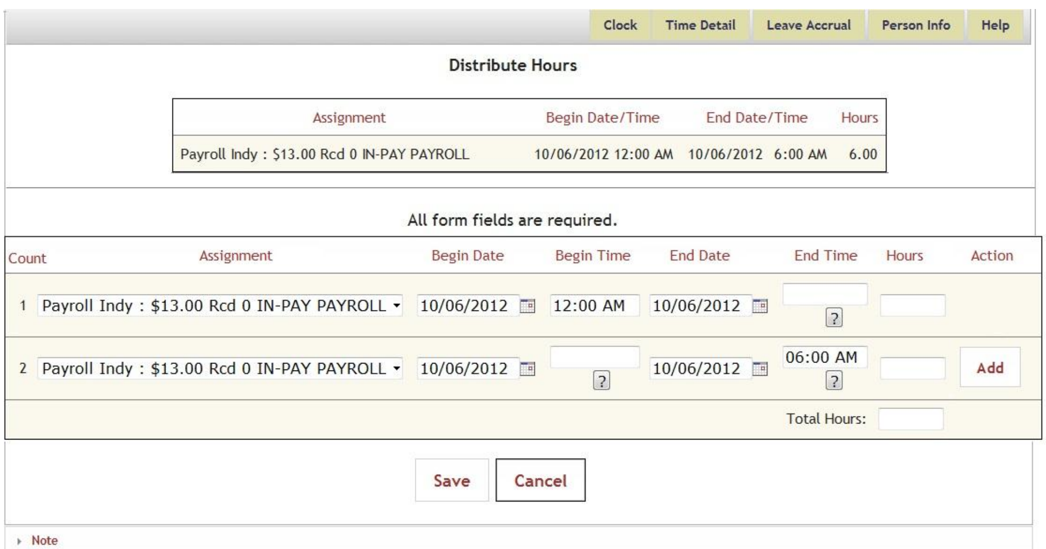
To distribute clocked work hours:

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**. This opens the *Distribute Hours* screen, showing the Time Block you selected with the total Hours you worked.

   Just below your selected Time Block, a special "form" displays and shows that Time Block as already split into two rows so you can enter Time Blocks for each of those two different Assignments.

   If you are distributing the hours from your original Time Block to more than two Assignments, use the **Add** button to add additional (Assignment) rows to the form. Then, complete each row on the form to enter the distinct Time Blocks you worked in each Assignment.



3. To complete the form and distribute your hours:

   a. Determine how many Assignment rows you need on the form. You need one row on the form for each Assignment you actually worked. (To distribute hours to three Assignments, you need three rows; for four Assignments, four rows, and so on.)

      To add an additional row to the form, click **Add**, and repeat for each row you need to add. This inserts a duplicate of the second row onto the form.

   b. On the form, go through every row and verify the Assignment showing in each one is correct. Use the <u>Assignment</u> dropdown in any row where you need to change the Assignment to the one you actually worked.

   c. Go through each row and verify the <u>Begin Date</u> and <u>End Date</u> are correct for the selected Assignment. To change a date, click on the calendar button, and then select a date from the pop-up calendar. Or, type a date into the field, formatted as DD/MM/YYYY.

Note: You probably won't need to adjust these dates unless you worked a Time Block in that Assignment that was overnight and spans over two days.

d. Go through each row and enter your Begin Time and End Time for the selected Assignment:

- In Row 1 all you can enter is your actual End Time for that Assignment. (The Begin Time cannot be changed.)
- Go to the next row on the form and enter the same Begin Time as the End Time you entered in the row above. Then continue (in that same row) and enter the End Time, Repeat this step for each row on the form, **unless it is the last row**.
- **If this is the last row on the form**, all you need to enter is the Begin Time (and leave the End Time unchanged).

The form will then show each Time Block and calculate the hours you worked in that Time Block for each Assignment.

HINT: Roll your cursor over the Question Mark, to see what formats are accepted by time-entry fields.

e. Verify the **Total Hours** you distributed to all your Assignments match the number of **Hours** you worked in the original Time Block (at the top of the screen). If not, enter any adjustments to the Time Blocks in your Assignment rows, as needed.

4. Click **Save**. That will distribute the hours, and return you to the *Clock* tab. If you open your *Time Detail* tab you can view the new Time Blocks (and hours worked) under each Assignment.

Manual Entry Timekeeping

Employees with **Manual-Entry** assignments will use the *Time Detail* tab to manually add time blocks for the hours they work or the hours of leave they take. When you login to KPME Time, your timesheet will open on this tab.

How to Record Hours (on the Time Detail tab)

If you have a **Manual-Entry** assignment, you will use the *Time Detail* tab on your timesheet to record your work hours. Here you enter your time "In" and time "Out" which adds a Time Block to your timesheet. If you accrue benefit leave hours, you will also enter a Time Block to record the type of leave (sick, vacation, PTO) and number of "Hours" that you took. This tab also allows designated employees to add a Time Block to enter a fixed-rate dollar "Amount" (such as tips).

Adding Time Blocks to a Timesheet

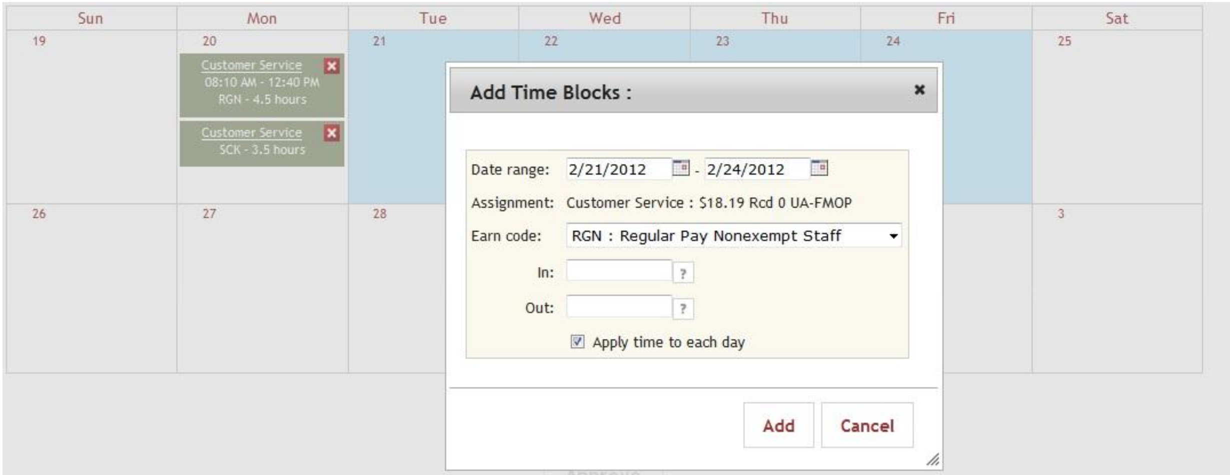
To **add** work hours, leave hours, or fixed dollar amounts on your timesheet, you must add a Time Block:

1. Log into KPME Time. (Timesheet opens on the *Time Detail* tab.)
2. On the pay period calendar, select the day or date range to add your Time Blocks:
   - To add a Time Block for one single day, click on the day you want to add.
   - To add the same Time Block on multiple days, such as Monday through Friday, **click and hold down the (left) mouse button** on the first day of your date range (Monday), **and simultaneously drag the cursor** over to the last day in the range (Friday), then release it.

   If you select multiple days, it highlights those days, and the 'Add Time Blocks' entry box 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 the **click and drag** method to select your two days. But, make sure you UNCHECK the 'Apply time to each day' checkbox.

   - Once you open the 'Add Time Blocks' entry box, you can also type in the date range you want or click the calendar button, located with each date field, to pop-up a monthly calendar and select a range of dates. For example, you could type in or select the date range as: 02/27/2012 to 03/01/2012.



This image shows the Add Time Blocks entry box, which opens above the timesheet calendar.

3. Verify the Date Range is correct.
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. The Earn Code field will default to the regular earn code for your job (RGH, RGW, RGN, RGP, or RBP). If you need to change it, select the appropriate Earn Code from the dropdown.
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 working.

HINT: Roll your cursor over the Question Mark, ? to see what formats are accepted by time-entry fields.

     b) In the 'Out' box, enter the time you stopped working.
   - 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 (e.g. 29 or 100 or 79.75).
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 a time block either for the hours you worked, the leave hours or the fixed amount you entered.

Example of the three types of Time Blocks

This image shows time blocks entered for regular hours, leave hours (i.e., sick) and fixed dollar amounts (i.e., tips).

Editing Existing Time Blocks

To **edit** a time block:

1. Click on the underlined Assignment name (in the example above, you would click on 'Cust Serv Desk').
2. This reopens the 'Add Time Blocks' entry box and you can edit the Date Range, and/or the Earn Code.
3. Depending on the Earn Code selected, you can also edit the In and Out times, the number of Hours, or the Amount.

4. When finished with your entries, click **Update**.
5. Verify that the Time Blocks are correct before you exit the timesheet.

Deleting Time Blocks

To **delete** any time block from a timesheet, click on the red 'X' button, in the upper right-hand corner of the time block. (See Time Block examples above.) When asked to confirm the deletion, click **OK** to delete it.

Employees can continue to edit their timesheets until it is approved by their timesheet Approver. If you have any questions about which Assignments or Earn Codes you should use, please contact your Approver.

Viewing a Summary of Worked Hours

On the *Time* Detail tab, below the calendar is a section showing a **Summary** of the hours that you have recorded on your timesheet. This section shows you the total 'Worked Hours' for each day along with a breakdown of the hours you worked by assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a week total, FLSA total, and period total.

Summary

	Sun 03/03	Mon 03/04	Tue 03/05	Wed 03/06	Thu 03/07	Fri 03/08	Sat 03/09	Week 1	Sun 03/10	Mon 03/11	Tue 03/12	Wed 03/13	Thu 03/14	Fri 03/15	Sat 03/16	Week 2	Period Total
Worked Hours:	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00	0.00	9.00	9.00	9.00	9.50	9.00	0.00	45.50	85.50
LP-VAC-U: LP Vacation Usage																	
ISU Dept 2 : $10.00 Rcd 0 ISUDEPT					8.00	8.00		16.00									16.00
Other					8.00	8.00		16.00									16.00
RGH: Regular- Hourly																	
ISU Dept 2 : $10.00 Rcd 0 ISUDEPT		8.00	8.00	8.00				24.00									24.00
ISU-TEST : $10.00 Rcd 0 ISUDEPT										9.00	9.00	9.00	9.50	3.50		40.00	40.00
Regular Hours		8.00	8.00	8.00				24.00		9.00	9.00	9.00	9.50	3.50		40.00	64.00
OVT: Overtime																	
ISU-TEST : $10.00 Rcd 0 ISUDEPT														2.50		2.50	2.50
ISU Dept 2 : $10.00 Rcd 0 ISUDEPT														3.00		3.00	3.00
Overtime Hours														5.50		5.50	5.50

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 and Warnings

If an employee should input an error when adding or modifying time blocks, the 'Add Time Block' entry box will show an error message highlighted in red at the top of the box. Corrective action should be taken to fix the fields noted in the error message.

Possible entry errors include:

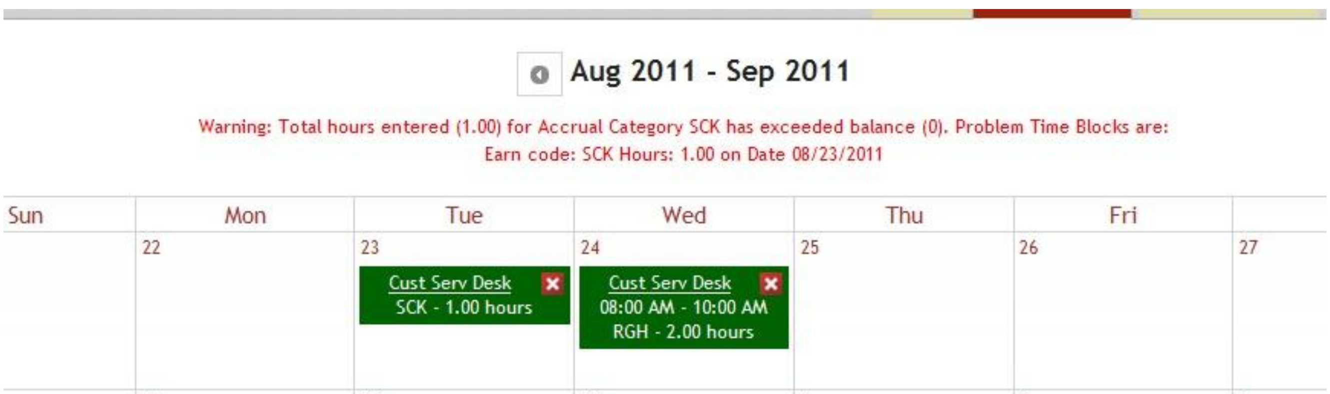
- The time or date is not valid.
- Start time and end time cannot be equivalent.
- Time entry field cannot be empty.
- Hour field cannot be empty.
- Amount field cannot be empty
- Amount cannot have more than two digits after decimal point.
- The start date/time is outside the pay period.
- The end date/time is outside the pay period.
- One time block cannot exceed 24 hours.
- The time block you are trying to add overlaps with an existing time block.
- Assignment is not valid for start/end date

The *Time Detail* tab will also display error and warning messages at the top of the timesheet in red text. Most entries, such as using sick or vacation time in excess of available balances, will issue a warning.

If there are only warnings, the timesheet will advance for approval, but the warning stays on the timesheet so the Approver will see it during approvals.

Corrective action should be taken to fix any errors or warnings that violate University or departmental policies.

The image below shows an example of a timesheet warning:



Leave Calendar

Leave eligible employees in KPME will have *Leave Calendar* tab that displays the leave reporting period for the employee. Leave reporting periods can be set up to fit department needs, such as weekly, biweekly, or bimonthly.

Non-exempt employees will report their leave usage on their timesheet and will use future leave calendars to plan and request leave. Exempt employees will report leave on their current and previous reporting leave calendars and will use future leave calendar periods to plan and request leave. Exempt employees' reporting leave calendars Kuali Rice/Workflow documents— Kuali Rice/Workflow is a routing and approval engine used to manage who can view and take actions on a particular leave calendar. Exempt employees with an active KPME Assignment will have a leave calendar automatically created when accessing the current leave calendar period.

Navigating the *Leave Calendar* is similar to the *Time Detail* tab described earlier in this document. There are two additional leave related links next to the go to Current Leave Calendar link.

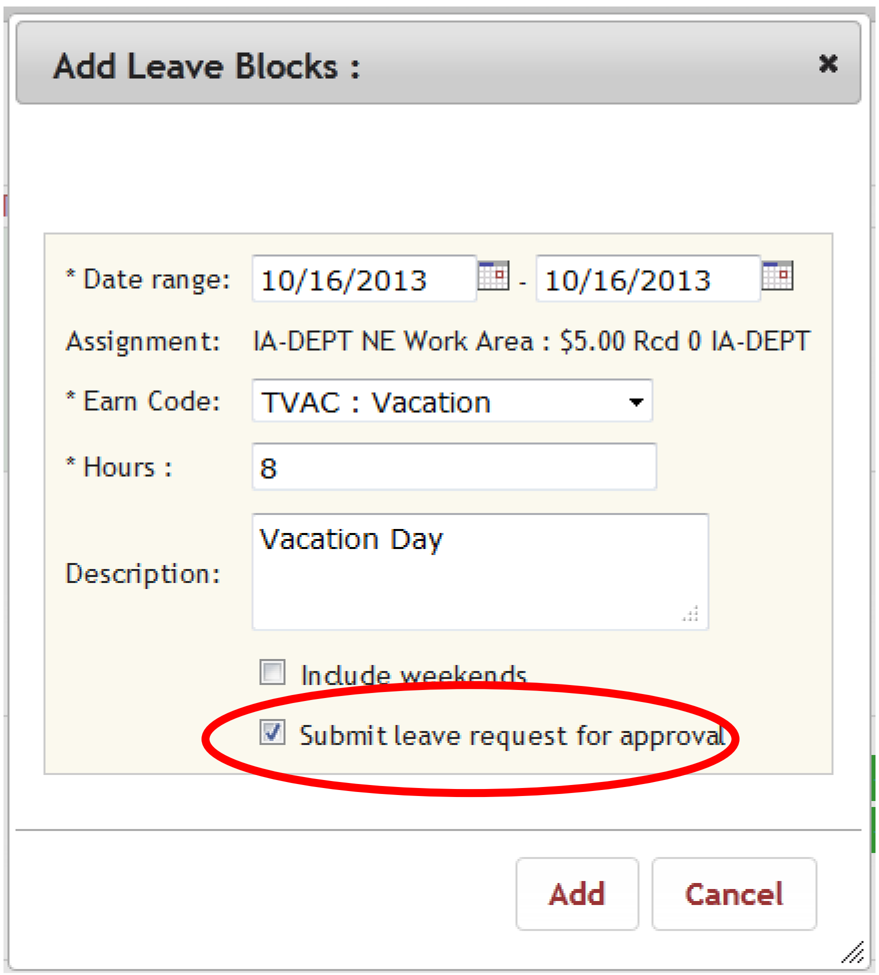
Leave Ledger is a tabular version of all the leave blocks on the leave calendar showing planned, requested, usage, and accrual leave entries in chronological order with balances for identified accrual categories. Previous and future year leave usage and accruals can be accessed by using the scrolling buttons shown on each side of the displayed year. The Leave Ledger also displays a record of the "Days removed in correction" and "Inactive Leave Entries". A link to the Current Leave Period at the top right side of the page takes returns to your leave calendars.

The Leave Request link from the leave calendar displays planned leave blocks that have been placed on future leave calendars and can be submitted for approval. This page also contains Leave Request Pending Approval, Approved Leave Requests and Disapproved Leave Requests. Past and future year leave requests and approvals accruals can be accessed by using the scrolling buttons shown on each side of the displayed year. A link to the Current Leave Period at the top right side of the page takes returns to your leave calendars.

Adding/Editing/Deleting Leave Blocks to a Leave Calendar

An employee who accrues leave hours such as paid time-off (PTO), vacation (VAC) or sick hours (SCK) will enter those hours either on their current timesheet if non-exempt or on their current leave calendar if exempt employee. Adding, editing and deleting leave blocks to Leave Calendar works the same adding time to the Time Detail.

Future leave hours can be added by scrolling forward to desired leave calendar period and adding a leave block. When adding a leave block, the request for leave can immediately be submitted for approval by checking “Submit leave request for approval” or the leave block can be added to the calendar as planned leave and later submitted for approval from the Leave Request page.



Viewing a Leave Summary

Below the calendar is a section showing the leave summary.

March 17 - March 30 2013

last approved: February 17 - March 2 2013

Accrual Category	Prior Year Carryover	YTD Earned	YTD Usage	Accrued Balance	Available Balance	Usage Limit	Future/Planned Usage	YTD FMLA Usage
LP-VAC	0.00	32.00	16.00	16.00	16.00		0.00	0.00
LP-SCK	0.00	24.00	0.00	24.00	24.00		0.00	0.00

Accrual Category totals…

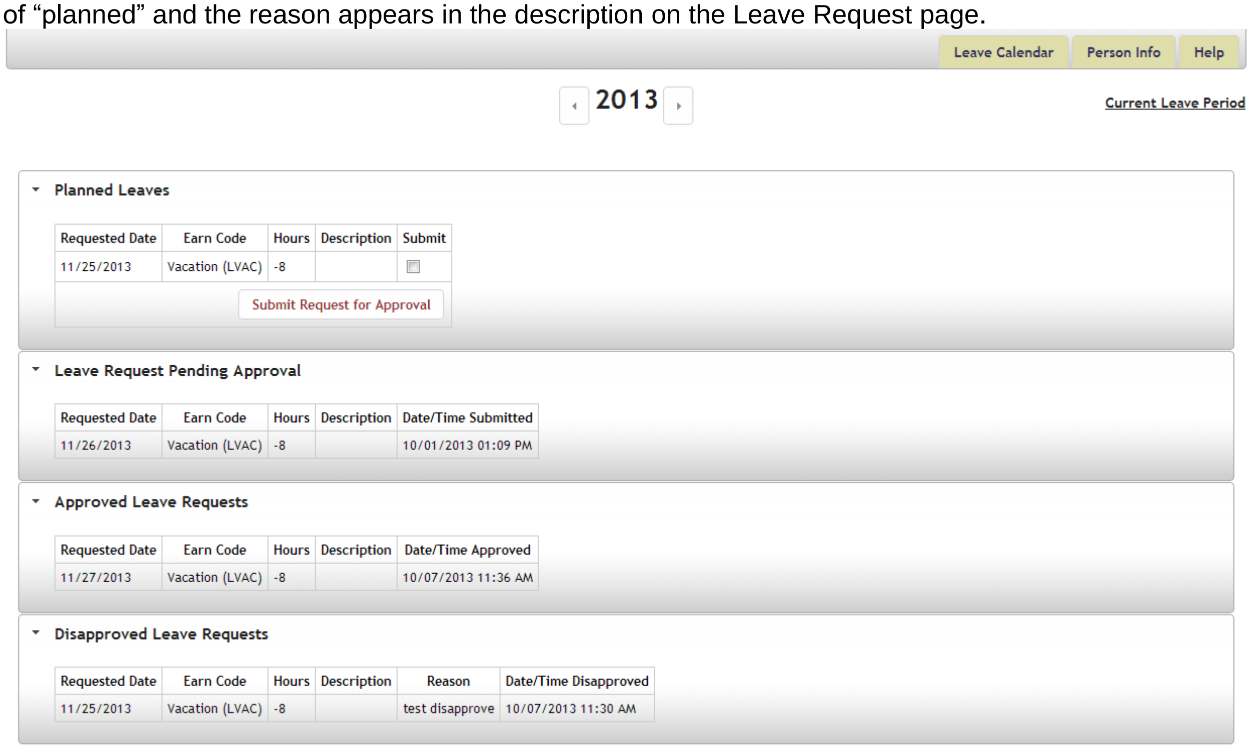
- Prior Year Carryover is the final accrued leave balance from the leave plan's previous year.
- YTD (year to date) Earned is the total accruals along with any leave adjustments that have occurred since the beginning of the Leave Plan's start date to the first date of the leave calendar being displayed (i.e. above example shows accruals up to March 17th).
- YTD Usage is the total usage since the beginning of the Leave Plan's start date to the last date of the leave calendar being displayed (i.e. above example totals include March 30th).
- Accrued Balance is sum of the Prior Year Carryover and YTD Earned minus YTD Usage and future leave usage
- Available Balance is the Usage Limit minus the YTD Usage.
- Usage Limit is the accrual category's rule applicable for the displayed leave calendar. When new usage leave blocks are added to the calendar, the total YTD usage cannot exceed the Usage Limit if there is one.
- Future/Planned Usage is the total usage leave blocks that have been added to future leave calendars.
- YTD FMLA Usage is the total usage of leave blocks with an FMLA flagged earned code that exists on the current and previous leave calendars.

The leave summary on leave calendars for the previous leave plan year will show the leave plan year's totals.

Leave Requests

Leave blocks are added to future leave calendars, they can be added to the leave calendar as a leave block with status of “planned”. To submit “planned” leave, click on the **Leave Request** link on the left under the document header. The Leave Request page has 4 different sections that leave blocks by leave block statuses: planned leave, requested leave that is pending approval, approved leave requests, and disapproved leave requests.

The Planned Leave section displays leave blocks that can be submitted for approval. From the planned leave section, leave can be requested. Leave can also be requested when adding leave blocks or editing a leave block on a future leave calendar by checking “Submit leave request for approval” on the add Leave Block dialog box. Leave requests are routed for approval to the requested leave block’s assignment’s Work Area Approver. A leave block that has been submitted for approval will appear in the Leave Request Pending Approval section of the Leave Request page. Once the leave requested is approved, the leave block will appear on the Leave Request page as an Approved Leave Requests and the leave block will appear on the leave calendars as approved. If leave block will appear is disapproved the requested leave block will be removed from the leave calendar and will appear in the last section of the Leave Request page, Disapproved Leave Requests, with the approver’s reason. Approvers can also defer requested leave with a reason for deferring. Deferred leave blocks will return to status of “planned” and the reason appears in the description on the Leave Request page.


Leave Calendar | Person Info | Help

2013

Current Leave Period

Planned Leaves

Requested Date	Earn Code	Hours	Description	Submit
11/25/2013	Vacation (LVAC)	-8		

Submit Request for Approval

Leave Request Pending Approval

Requested Date	Earn Code	Hours	Description	Date/Time Submitted
11/26/2013	Vacation (LVAC)	-8		10/01/2013 01:09 PM

Approved Leave Requests

Requested Date	Earn Code	Hours	Description	Date/Time Approved
11/27/2013	Vacation (LVAC)	-8		10/07/2013 11:36 AM

Disapproved Leave Requests

Requested Date	Earn Code	Hours	Description	Reason	Date/Time Disapproved
11/25/2013	Vacation (LVAC)	-8		test disapprove	10/07/2013 11:30 AM

Other Employee Timekeeping Options

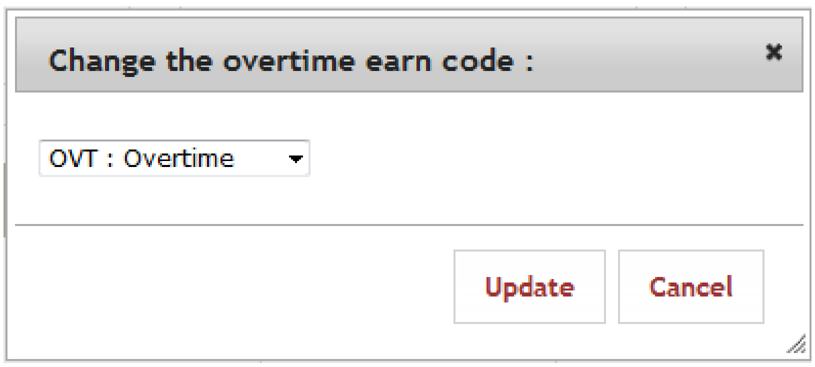
Changing Comp Hours to Overtime (and vice versa)

Departments set up rules that determine whether or not employees for their department's work areas earn comp time or overtime when accumulating more than 40 hours in a week.

Your department may give you the option to change comp time to overtime hours, and vice versa.

1. If you have this option, go to the *Time Detail* tab, and find the Time Block you want to change.
2. Roll your cursor over the underlined overtime earn code text in that Time Block and the cursor will change to a 'hand' cursor which indicates the underlined text serves as a link.

3. Click on that link to pop open the "Change the overtime earn code" box, then go to the dropdown field and change the earn code to the one you want, and click **Update**.



The hours will update to that earn code in the Time Block and on the timesheet (hours) Summary.

Notifying Approvers

Employees without access to e-mail or immediate access to their timesheet approvers (or supervisors) can use the *Person Info* tab on their timesheet to send an e-mail message and report a problem or convey other work-related information.

To send an e-mail to your approver(s):

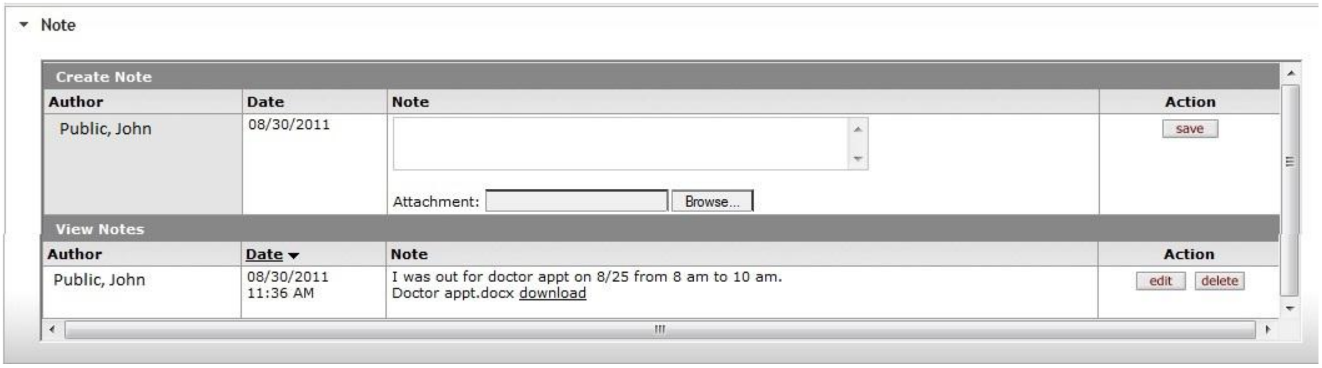
1. Open your timesheet and go to the *Person Info* tab.
2. Click on the '**Your Jobs**' section to open it. The names of your approver(s) are listed there.
3. Click on the underlined <u>Name</u> of your approver.
4. If that opens an Internet Explorer Security window, click the **Allow** button.
5. This opens a blank email screen (in Outlook) already addressed to your approver. Type in the subject and message you wish to send.
6. When finished, click **Send**.

Adding, Editing or Deleting a Timesheet 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 '<u>Attachment</u>' 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 <u>Attachment</u> field shows the selected file is ready to upload, then click **Save**. The title of the file you attached will appear next to a <u>download</u> link.

If you click the <u>download</u> link, it allows you or others, such as your timesheet approvers to view the attached file.

Warning! ***In the timesheet Notes, do NOT enter text or attach a document that contains sensitive information such as SSN's or HIPPA-related data.***

Use the **Edit** or **Delete** buttons to modify a note, or to remove an existing note that you added. (You cannot remove any notes other than the ones you added.)

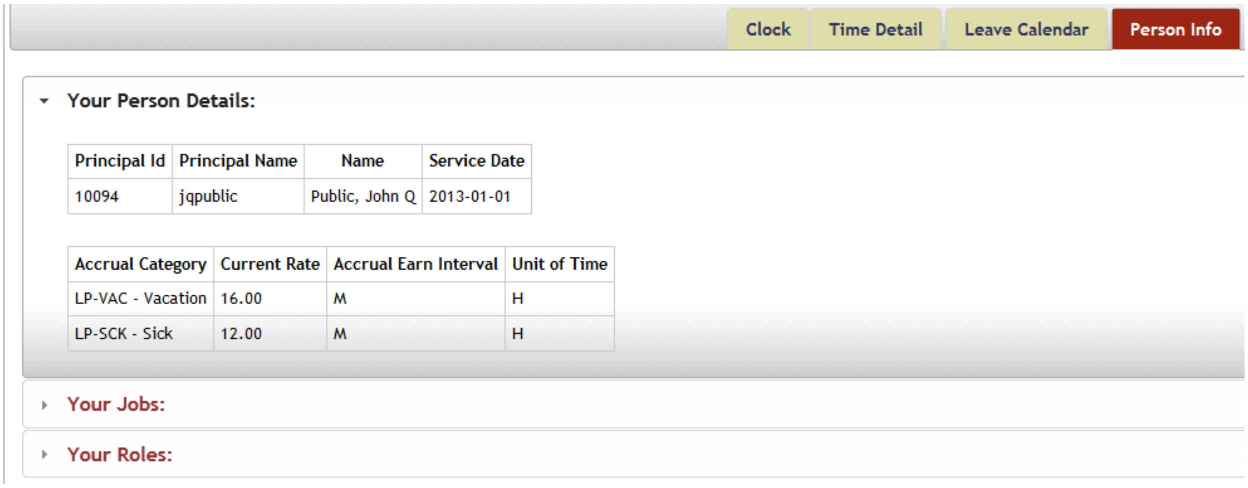
Viewing the Route Log

Click on the **Route Log** section to open that section and view the approval routing for your 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 about University and/or departmental rules about going into negative balances.

Viewing your Jobs, Assignments or Roles

The *Person Info* tab will show you details about your person, jobs and roles.



The “Your Person Details” section shows your employee name and employee Id number. If you are a leave eligible employee, the leave accrual for the employee’s leave plan will appear.

The “Your Jobs” section is a reference tool that shows you what Jobs and Assignments you have, including your Organization, Work Area/Task and the name of your approver(s). It includes active links that allow you to send an email to your approver(s) to notify them of an issue or to ask questions.

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

Getting Help and Reporting Problems

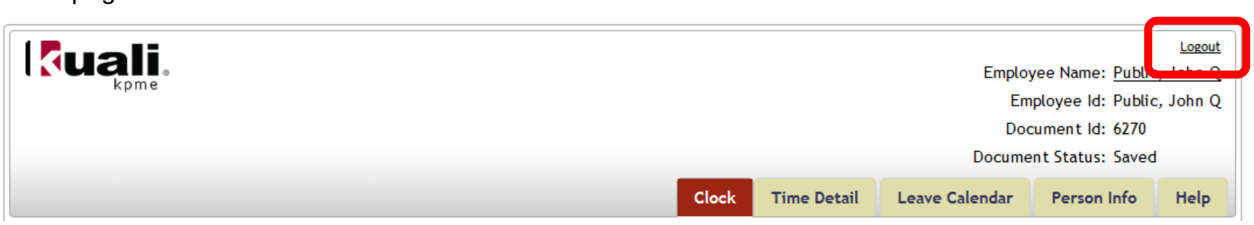
The *Help* tab on your timesheet provides online tutorials if you need help in clocking in/out, or adding time blocks and leave hours. Links to online system documentation are also provided there.

If you have trouble logging in or clocking on your timesheet:

1. Check with your departmental Supervisor or Approver to make sure that your 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.

Logging Out

To log out of the system and close your timesheet, click on the **Logout** link located at the upper right-hand corner of the page.



Approver Options

This section discusses the key tasks that Approvers can perform in the KPME system, such as approving timesheets, entering/modifying Time Blocks, reviewing missed clock punches, adding Notes to a timesheet, or viewing Route Logs. KPME can have two types of approvers depending on the employee's assignments on their timesheet or leave calendar. First required approval will be by the assignments Work Area approver. An optional second level routing can be designated by Department for approval of a department's Payroll Processor. Work Area Approvers and Department Payroll Processors will use the same Time and Leave Approval tabs for approving timesheets and leave calendars.

Overview of the Time and Leave Approval tabs

When you log into the system as an a work area approver or department payroll processor, you will have the *Time Approval* and *Leave Approval* tabs. *Time Approval* is used for approving their non-exempt employees' timesheets. *Leave Approval* is used for approving exempt employees leave calendars. Work Area approvers can also access the Leave Request Approval page from the Leave Calendar to approve employee submitted leave requests.

The approval tabs open the '**monitor and approval**' page which provides a "one-stop" portal for approvers to monitor, clean-up and approve timesheets or leave calendars. The Calendar Period heading on these tabs will show what period you are in.

This page provides the ability to '**sort and filter**' by Department and Work Area to find those timesheets or leave calendars which you monitor and approve, and the ability to '**search by**' Principal ID or Document ID and find a specific timesheet or leave calendar. However, these fields only search within the calendar period you are viewing at that time.

It also provides two other dropdown search fields, **Calendar Year** and **Calendar Pay/Leave Period** when used jointly gives you the ability to instantly jump to any set of employee timesheets or leave calendars.

Once you go to any historical timesheets or leave calendar, the **Go to Current Period** link will appear, and serves as a "shortcut" you can click to return to the same set of employee timesheets or leave calendars in the current calendar period.

Finally, there are **Previous** and **Next** arrow buttons located on each side of the Calendar Period heading that allow you to scroll back and forth through a set of historical (or current) calendars by calendar period, in sequential order.

You can open 'quick views' of any Notes and Warnings present on the timesheet or leave calendar, and scroll back and forth by calendar period to view and open previously "approved" timesheets and previous or future leave calendars. On Time Approval, you can monitor a **Clock-Entry** employee's work status (in real-time). If one of your timesheet employees fails to clock out after 12 hours, their Name is shaded in red to flat it for attention.

When necessary, you can click on a Document Id number to open that employee's timesheet or leave calendar to enter corrections, to delete an automatic meal deduction on a timesheet when the employee did not take one, and if applicable, to distribute work hours between multiple Assignments.

Additionally, you can open any historical timesheet or leave calendar to review the recorded time or leave blocks for that employee.

Or, you can use the Name link to access the *Person Info* tab and view the jobs, assignments and KPME roles held by that employee.

On Time Approval, a summary view of the employee's timesheet can be viewed by using the Plus buttons to pop-open the summary (minus to close). This view can be used to monitory their daily hours, review their daily weekly and total pay period hours by assignment. Leave Approval has Plus buttons that expand to show the leave usage and balance for the period.

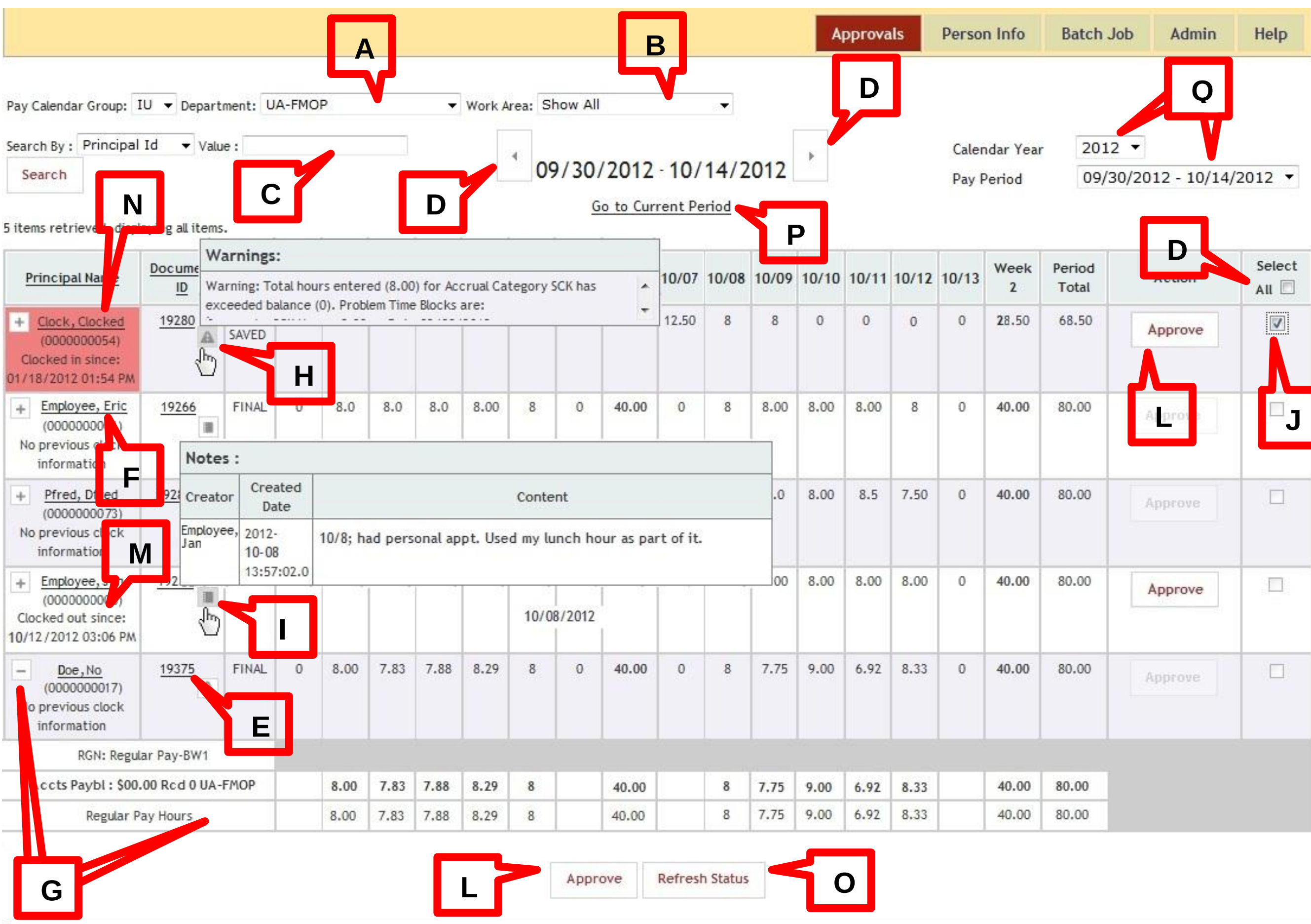
These approval tools allow you to monitor, review and clean-up your employee's timesheets or leave calendar prior to approval and during the calendar reporting period.

If you are a work area approver, you should check your Action List notification emails during each pay period to ‘Approve’ or to ‘Correct and Approve’ any Missed Punch documents routed to you. These documents inform you of any missed clock-ins or clock-outs by the employees you supervise, and allow you to correct a document submitted with an inaccurate clock time. Leave requests are also routed to only the Work Area Approvers. Balance Transfers and Payouts triggered by max balances on the leave calendar are routed for approval to the work area approver and department’s payroll processor, if applicable for that department,

At the end of each pay period, work area approvers must approve timesheets. The ‘monitor and approval’ page provides you the option to approve an individual timesheet or do bulk approvals. Work area timesheets that require the second level Department Payroll Processor approval will be routed for approval. On ‘monitor and approval’ page, timesheets that enroute will have a label above the “Approve” button to indicate the next approval action, “Approver” or “Payroll Processor”, The information on a fully approved (Final) timesheet is then processed and can be sent to an associated Payroll system.

After the leave calendar period, an exempt employee can submit their leave calendars for approval. On the Leave Approval page, employees’ leave calendar will be available to approve individual or in bulk.

The following illustration of the *Time Approval* tab demonstrates the options available on both the approval tabs.



Note: This image presents all the options available on the *Time Approval* 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 on the *Time Approval* tab. You can:

A Select a specific Department from the dropdown list at the top of the page to view all the employee timesheets for that department.

B (After selecting a Department), select a specific Work Area from the dropdown list at the top of the page, to view the timesheets for that work area.

C Search for a specific timesheet, in that pay period, by Principal ID or by Document ID. In the 'Search By' field, select 'Principal ID' or 'Document ID' from the dropdown, then enter the specific ID number of the employee or timesheet you want to find in the 'Value' field and click **Search**.

D Click the **Previous** or **Next** arrow buttons, when present, to view the previous (or next) set of timesheets (for your employees) in sequential order, by pay period.

E Click on the 'Document ID' of the timesheet, to open that employee's timesheet.

F Click on an employee's 'Name' to open the *Person Info* tab for that employee and view their jobs, assignments, and KPME roles.

G Click on the 'Plus' button by an employee's name to open a "summary view" beneath that row so you can see the hours that employee recorded by Assignment. Click the 'Minus' button to close the summary.

H Roll (and hold) your cursor over the 'Warnings' button to pop open a "quick view" window that shows the warnings present on that timesheet.

I Roll (and hold) your cursor over the Notes button to pop open a "quick view" window that shows the notes entered on that timesheet.

J Select an individual timesheet as 'ready to approve,' by clicking the "Select" checkbox.

K Select all of the 'ready to approve' timesheets on that page by clicking the "Select ALL" checkbox (at the top of the column).

L Click the **Approve** button to approve timesheet(s). The **Approve** button at the bottom of the page allows bulk approval of all the timesheets you have selected. If you select only one timesheet to approve, you will use the **Approve** button for that specific timesheet, located on the right side of the page in the 'Action' column.

M See the current 'Work Status' of clock-entry employees

N Spot employees clocked in > 12 hours, as they are flagged (highlighted) in red.

O Click the **Refresh Status** button to refresh the current status of the timesheets you are viewing.

P Click on the **Go to Current Period** link to jump from a previous timesheet back to the one for the current pay period.

Q Search for historical employee timesheets by year and then pay period, by using the Calendar Year field jointly with the Pay Period field.

Note: Many of the same features listed above for the *Time Approval* tab are also available on the *Leave Approval* tab.

Timesheet Monitoring, Reviewing and Correcting

During the Pay Period, and before timesheets are routed for approval, you can use the *Time Approval* tab to open your '**monitor and approval**' page. This page provides a "one-stop" portal to monitor, clean-up and approve your employee's timesheets.

Here you will see a list of timesheets for all the employees you supervise (or approve), with options to sort them by Work Area or to search for a specific timesheet.

Timesheets are accessible throughout the pay period which allows you to monitor employee status in real-time, to catch employees flagged as being clocked-in greater than 12 hours (so you can get them clocked out), and if warranted, to open and edit that timesheet to enter corrections.

The Work Status of clock-entry employees (clocked in, out for lunch, returned from lunch, clocked out) is shown, along with the status of each timesheet (saved, enroute, or final).

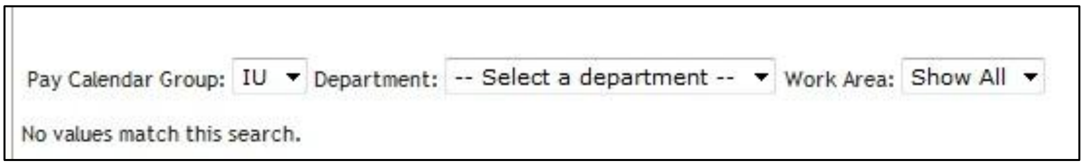
You can roll your cursor over icons that open up “quick views” of Notes and Warnings, and clickable icons are provided to open (and close) a brief summary view of all hours and dollar amounts recorded, by Assignment, on an employee’s timesheet.

When a timesheet or set of timesheets are ready to approve, you will use the Approve buttons on this tab to do your approvals. Once a timesheet is fully approved (Final), the information is then processed and can be extracted to an automated Payroll system.

Finding Timesheets

When you first open the ‘monitor and approval’ page, it finds a list of all the departments that you supervise (or approve). If you approve timesheets for only one department, that value is already loaded in the Department field.

Use the ‘sort and filter’ fields (see illustration below) to sort timesheets by Department and then to filter the list down by Work Area to view only the timesheets for the employees in that work area.



1. Log in to KPME Time and go to the *Time Approval* tab.
2. Select the Department you wish to view from the Department dropdown. That displays a list of timesheets you can monitor, review, (and at the end of the pay period) approve. ***Note:*** It may take the system several seconds to find all of your timesheets—the bar at the bottom of the page will show, “waiting for response from iu.edu…” while this search occurs.
3. You can use the Work Area field to filter and view your timesheets by a specific work area. Select the Work Area you want to view in the Work Area dropdown.

   The system will find the timesheets you specified. If there are no timesheets found for that Department or Work Area, you will see the message, “no values matching this search” on the page.

You can also use the ‘search by’ fields (see illustration below) to search for a specific timesheet by Document ID, or Principal ID (University ID). These fields will only appear (below the ‘sort and filter’ fields) once you have selected a set of timesheets to view.

1. In the Search By field, select the Parameter you wish to search by and in the Value field, enter the specific number you want to find.
2. It may take the system a few seconds to find this value (and you will see a black circle briefly spinning on the page). If the value you entered is found, it shows in a dropdown box under the Value field. In that box, click the ID number again to select it.

The system will find the timesheet you specified. If this employee or timesheet do not belong to the Department or specific Work Area where you are searching, you will see the message, “no values matching this search” on the page.

Viewing Previous and Next Timesheets

On the ‘monitor and approval’ page, you can click on the **Previous** or **Next** arrow buttons (located on each side of the Pay Period heading) to view the same set of previous employee timesheets, by pay period.

All historical timesheets have been converted to the KPME Time system, so you can use these buttons to scroll back and forth and view previously approved timesheets, in chronological order, for your employees.

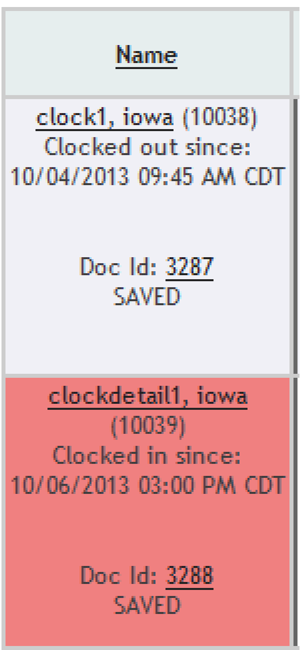
Once you go to any previous or future pay period, the **Go to Current Period** link will appear on the page, and serves as a “shortcut” you can click to return to the current pay period.

You can also use the **Calendar Year** and **Pay Period** fields jointly, and select a year and pay period to jump instantly to that set of employee historical (current, or future) timesheets.

Viewing Employee Work Status

The **Name** column on the timesheet ‘monitor and approval’ page includes the name of the each employee, their University Id, and it shows the current Work Status for **Clock-Entry** employees.

You can view, during the Pay Period, the current work status of **Clock-Entry** employees. This allows you to monitor your employees in real-time during the Pay Period, and spot any employees who failed to clock out.



The current Work Status for a **Clock-Entry** employee appears just under their Name and Principal ID.

Spotting employees clocked in > 12 hours

In this example, you can see that the first employee is clocked out. The second employee’s ‘Name’ cell is flagged (highlighted in red), which indicates it’s been more than 12 hours since the employee clocked-in.

This allows you to spot an employee who missed a punch out, so you can contact them to submit a Missed Punch document and record their clock out.

You also have the option to submit a Missed Punch document for this employee to record their missed punch on the timesheet.

Refreshing Employee/Timesheet Status

At the bottom of the ‘monitor and approval’ page there is a **Refresh Status** button. When you click that button, it updates the current work status of the employees and their timesheets.

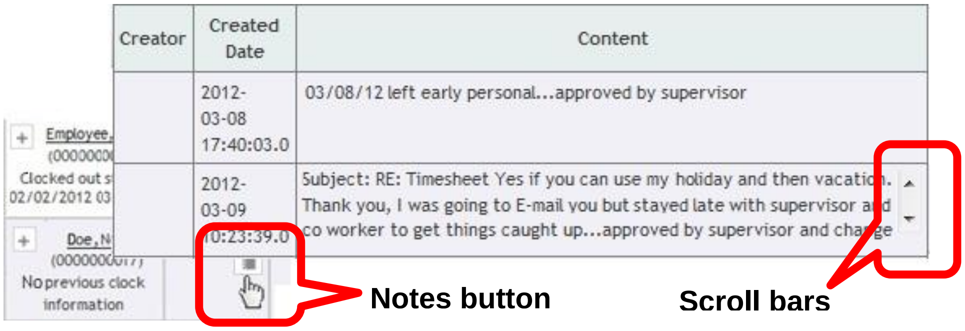
Viewing Timesheet Warnings and Notes

You can view the Warnings and Notes entered on a timesheet without having to open it. The ‘monitor and approval’ page provides special ‘roll-over’ buttons that appear (with the Document ID number) whenever that timesheet contains any Warnings or Notes.

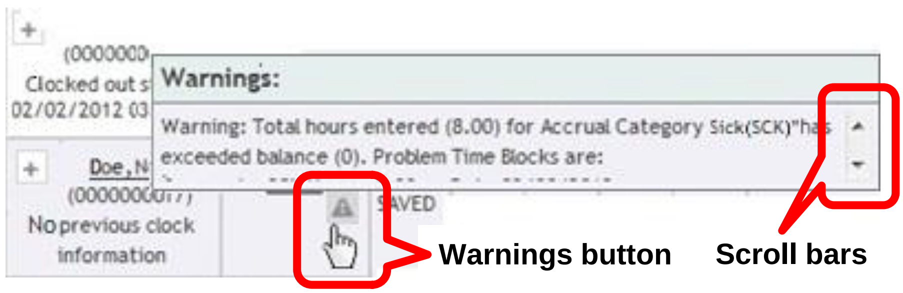
When you roll (and hold) your cursor over either one of these special buttons, it will pop-up a ‘quick view’ window of any Warnings or Notes on that employee’s timesheet.

1. Log into KPME Time and go to the *Time Approval* tab.
2. To open the Notes “quick view” window for a timesheet, roll (and hold) your cursor over the Notes button (located with the timesheet Document ID).

3. If a Note contains several lines of text, move your cursor onto the 'quick view' window, and use the scroll bars located on the right to scroll up and down and read the entire Note.



1. Log into KPME Time and go to the *Time Approval* tab.
2. To open the Warnings "quick view" window for a timesheet, roll (and hold) your cursor over the 'Warnings' button (located with the Document ID).
3. If a Warning contains several lines of text, move your cursor onto the 'quick view' window, and use the scroll bars located on the right to scroll up and down and read the entire Warning.

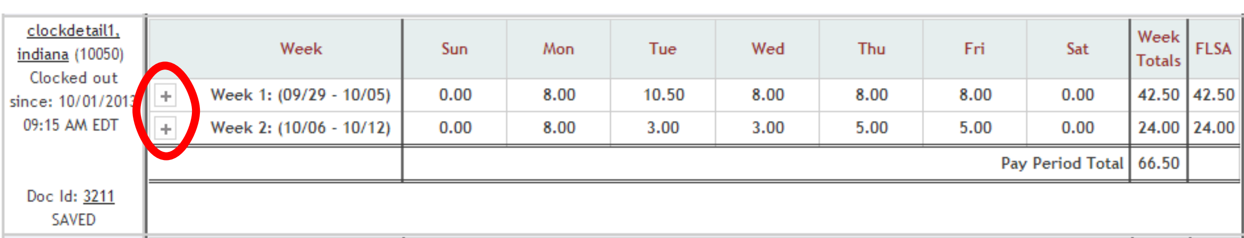


Opening (and Closing) the 'Summary View' of Employee Hours

On the 'monitor and approval' page, you can open (and close) a 'summary view' of the hours that an employee recorded on their timesheet.

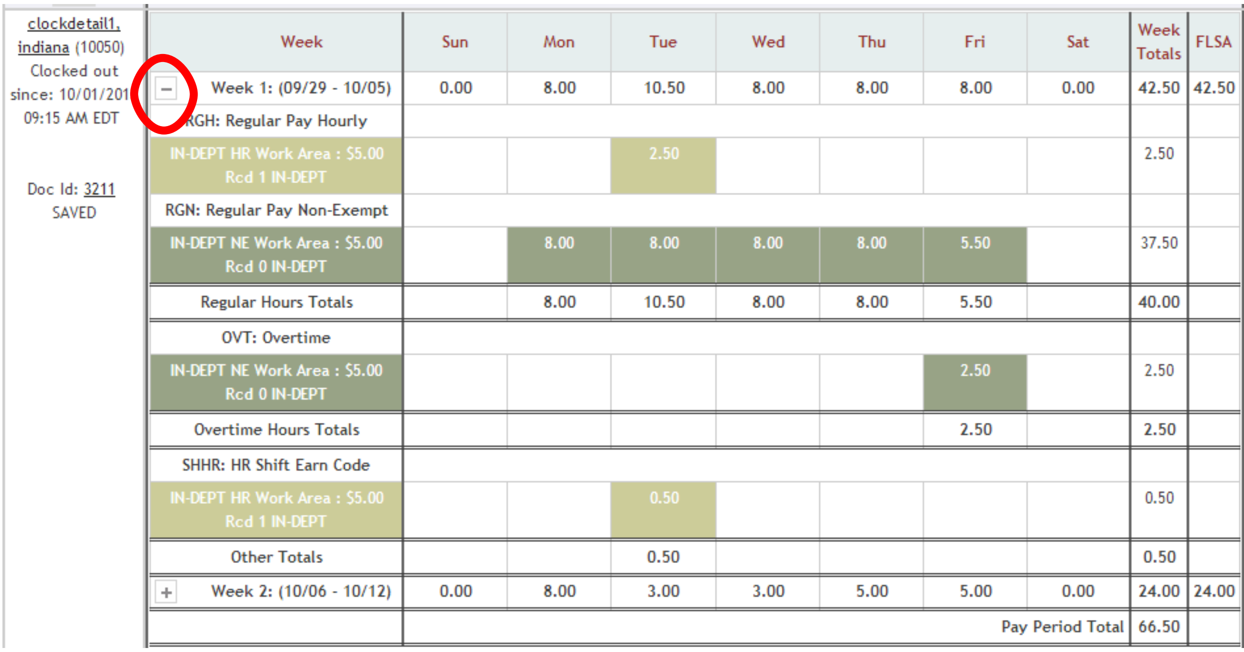
This "summary view" is the same as the hours **Summary** located on the employee's *Time Detail* tab. Both will show you the total 'Worked Hours' for each day along with a breakdown of the hours worked by Assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a week total, FLSA week total, and period total.

1. Log into KPME Time and go to the *Time Approval* tab.
2. To open the "summary view" for an employee's week, click the 'Plus' button by the week you wish to expand for an employee.



	Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Week Totals	FLSA
clockdetail1, indiana (10050) Clocked out since: 10/01/2013 09:15 AM EDT	Week 1: (09/29 - 10/05)	0.00	8.00	10.50	8.00	8.00	8.00	0.00	42.50	42.50
	Week 2: (10/06 - 10/12)	0.00	8.00	3.00	3.00	5.00	5.00	0.00	24.00	24.00
								Pay Period Total	66.50	
Doc Id: 3211 SAVED										

This opens, just beneath that row, the "summary view" of worked hours by the employee.



clockdetail1, indiana (10050)
Clocked out since: 10/01/201 09:15 AM EDT

Doc Id: 3211
SAVED

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Week Totals	FLSA
− Week 1: (09/29 - 10/05)	0.00	8.00	10.50	8.00	8.00	8.00	0.00	42.50	42.50
RGH: Regular Pay Hourly									
IN-DEPT HR Work Area : $5.00 Rcd 1 IN-DEPT			2.50					2.50	
RGN: Regular Pay Non-Exempt									
IN-DEPT NE Work Area : $5.00 Rcd 0 IN-DEPT		8.00	8.00	8.00	8.00	5.50		37.50	
Regular Hours Totals		8.00	10.50	8.00	8.00	5.50		40.00	
OVT: Overtime									
IN-DEPT NE Work Area : $5.00 Rcd 0 IN-DEPT						2.50		2.50	
Overtime Hours Totals						2.50		2.50	
SHHR: HR Shift Earn Code									
IN-DEPT HR Work Area : $5.00 Rcd 1 IN-DEPT			0.50					0.50	
Other Totals			0.50					0.50	
+ Week 2: (10/06 - 10/12)	0.00	8.00	3.00	3.00	5.00	5.00	0.00	24.00	24.00
							Pay Period Total	66.50	

3. To close the “summary view,” click the ‘Minus’ button by the expanded week.

Note: You can open the ‘summary view’ of hours worked for more than one employee at a time.

Opening a Timesheet

To view an employee’s timesheet or to enter corrections, you can open it from your action list of timesheets on the ‘monitor and approval’ page.

1. Log into KPME Time and go to the *Time Approval* tab.
2. Use the ‘sort and filter’ or ‘search by’ fields to find the timesheet you want to open.

   Click on the underlined Document ID number. That opens the employee’s timesheet calendar on the *Time Detail* tab. (The calendar header is clearly marked to indicate you are working on an employee’s timesheet.)

   Here you can review or edit any Time Blocks recorded by this employee, or click on other tabs to view the employee’s Leave Accruals, Person Info, or last Clock action. On the *Clock* tab, you could clock the employee in/out, or submit a Missed Punch document to record a missed clock action.

3. To close the timesheet (calendar) for this employee, click the **Return** button at the top of the page. This returns you to the ‘monitor and approval’ page.

Adding Time Blocks to a Timesheet

To **add** work hours, leave hours, or fixed-rate dollar amounts to an employee’s timesheet, you must add a Time Block:

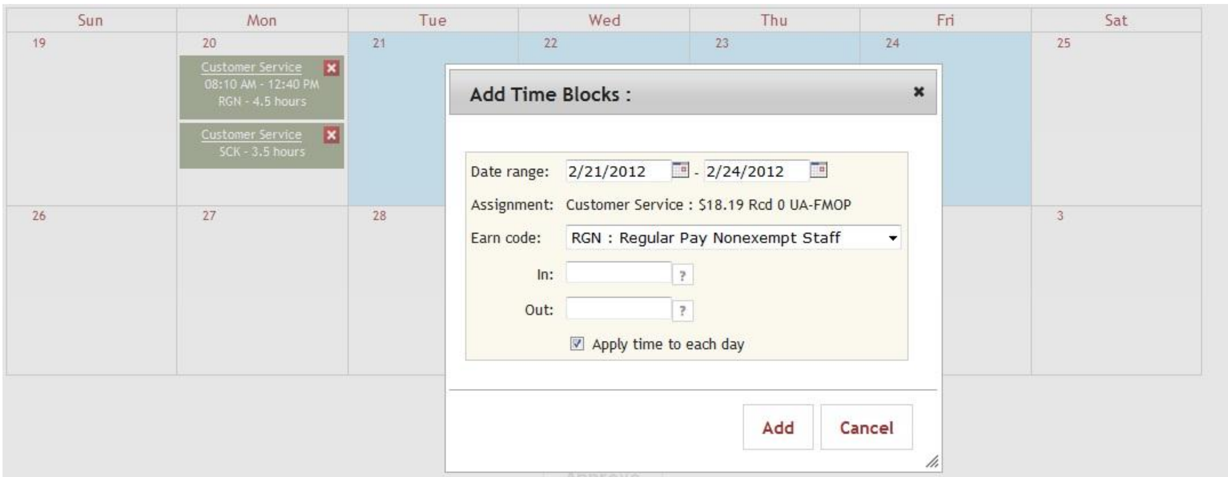
1. Log into KPME Time and go to the *Time Approval* tab.
2. Use the ‘sort and filter’ or ‘search by’ fields to find the timesheet you want to open.
3. Click on the underlined Document ID number. That opens the employee’s timesheet calendar on the *Time Detail* tab.
4. On the Pay Period calendar, select the day or date range on which to add the Time Blocks:

   - To add a Time Block for one single day, click on the day you want to add.
   - To add the same Time Block across multiple days, such as Monday through Friday, **click and hold down the (left) mouse button** on the first day of your date range (Monday), **and simultaneously drag the cursor** over to the last day in the range (Friday), then release it.

When you select multiple days, it highlights those days (in blue), and the ‘Add Time Blocks’ entry box opens showing the date range you selected. A single day entry, just opens the ‘Add Time Blocks’ screen with the date range showing as the same day.

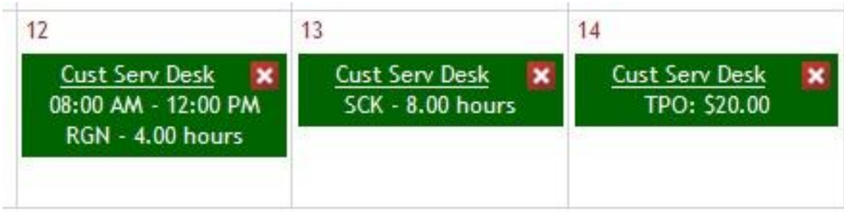
If the employee works an **overnight shift**, you can use the **click and drag** method to select both days in the shift. But, you must UNCHECK the ‘Apply time to each day’ checkbox.

- Once the ‘Add Time Blocks’ entry box is open, you also have the option to type in the date range or click on the calendar button, beside each date field, to pop-up a monthly calendar and select the range of dates. For example, you could type in or use the calendar button to enter a date range such as: 02/27/2012 to 03/01/2012.



This image shows the Add Time Blocks entry box, which opens above the timesheet calendar.

5. Verify the Date Range is correct.
6. Select the Assignment for the time block you are adding. (If the employee has only one Assignment, it will already be selected.) A time **Assignment** is a unique combination of Job, Job Number, Work Area (and Task), and is used to record the hours that an employee works.
7. The Earn Code field will default to the regular earn code for the employee’s job (RGH, RGW, RGP, RGN, or RBP).
   - If you need to change it, select the appropriate Earn Code from the dropdown list (such as ABS, SCK, VAC, PTO, CPT, etc.)
8. You can enter Time Blocks for regular hours worked, hours of leave time taken, or for fixed-rate dollar amounts:
   - If the entry is to add a Time Block for regular hours worked:
     c) In the ‘In’ box, enter the time that the employee started work. (Roll your cursor over the Question Mark, to see what formats are accepted by time-entry fields.)
     d) In the ‘Out’ box, enter the time that the employee ended work.
   - If your entry is to add a Time Block of Leave Hours being taken (e.g., sick, vacation):
     a) In the ‘Hours’ box, enter the number of leave hours the employee is taking.
   - If your entry is to add a fixed-rate dollar amount (e.g. tips):
     a) In the ‘Amount’ box, enter the dollar amount. (e.g., 65 or 55.32).
9. 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 an overnight shift.**
10. When finished, click **Add**. This adds a Time Block either for the regular hours worked, the leave hours taken, or the fixed dollar amount you entered.



Example of the three types of Time Blocks

This image shows time blocks entered for regular hours, leave hours (i.e., sick) and fixed dollar amounts (i.e., tips).

Editing Existing Time Blocks

To **edit** Time Blocks already clocked or entered on an employee's timesheet as regular work hours, leave hours, or fixed-rate dollar amounts:

1. Use the 'sort and filter' or 'search by' fields to find the employee's timesheet you want to edit.
2. Click on the underlined Document ID number to open that timesheet on the *Time Detail* tab.
3. In the Pay Period calendar, click on the underlined name of the **Assignment** you want to edit. (In the illustration above, you would click on 'Cust Serv Desk').
4. This reopens the 'Add Time Blocks' entry box and you can edit the Date Range, and/or the Earn Code.
5. Depending on which Earn Code was selected, you can also edit the In and Out times, the number of Hours, or the Amount.
6. When finished with your editing, click **Update**.
7. Verify that the Time Blocks are correct before you exit the timesheet.

Deleting Time Blocks

To **delete** any Time Blocks already clocked or entered on an employee's timesheet:

1. Use the 'sort and filter' or 'search by' fields to find the employee's timesheet you want to edit.
2. Click on the underlined Document ID number to open that timesheet on the *Time Detail* tab.
3. To **delete** any Time Block from the Pay Period calendar, click on the red 'X' button, in the upper right-corner of that Time Block. (See the Time Block illustration above.)
4. When asked to confirm the deletion, click **OK** to delete it.

Important! Employees can continue to edit their timesheet (after the pay period ends) until their timesheet Approver approves it.

Adjusting Shift Differential Hours

Approvers may have to adjust shift differential hours for Manual-Entry employees working an overnight shift that starts in one pay period, but ends in the next pay period (e.g., 11 PM to 7 AM), because the Minimum Hours (for shift pay) will not be met before the end of the first Pay Period.

Timesheet Approval and Routing

This section explains how timesheets are routed for approval, briefly reviews issues that might prevent you from approving a timesheet, and explains how to approve one timesheet or multiple timesheets.

Employee Submission

Employees click on the **Submit** button to route their timesheets for approval, and they can continue to enter edits on them up until the moment they are approved. After all the approvals are completed, the employee may no longer enter any changes on their timesheet ("final" document status).

Approver Approvals

Timesheets route from the employee to the work area approver using Workflow. When you log into the system as an Approver, you will see the *Time Approval* 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.

If the information on the "monitor and approval' page is not sufficient for you to do your approval, then click on the Plus buttons to view a summary of the hours worked. You can also click on the underlined Document ID number to open that timesheet and view a detailed 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' that shows you the current routing status of each timesheet. A status of "SAVED" indicates a timesheet was created and is still in the employee's hands. A status of "ENROUTE" indicates the employee has submitted the timesheet to route it for approval, and a status of "FINAL" indicates the timesheet was approved and is final.

When a timesheet is ready to be approved, the "Action" column will show an active "Approve" button. Above that button will display the route level the approval is for, Approver or Payroll Processor. To bulk approve timesheets ready to approval, click the 'select' box next to the employee you wish to approve and click the **Approve** button at the bottom. After doing an approval action, click the "Refresh" button at the bottom to update the document statuses. This completes the approval and any notifications are removed from your Action List.

Timesheets Not Ready to Approve

Some timesheets may have problems that prevent them from being approved. In this case, the Approver should enter 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.

The *Time Detail* tab will display error and warning messages at the top of the timesheet in red text.

If there are only warnings, the timesheet will advance for approval, but the warning stays on the timesheet so the Approver will see it during approvals.

Timesheets with problems will not have an active approval button in the Action column (the button will be grayed out or 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 hours each week.

Corrective action should be taken to fix any errors or warnings that violate departmental policies

Approving Timesheets

Detailed steps are presented below for performing individual and bulk timesheet approvals. Please note these procedures list all the possible steps, including ones where you may need to distribute work hours or enter a correction on a timesheet. If you have already performed that step or find it unnecessary, please go to the next step in the procedure.

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 *Time Approval* tab.
2. Select the Department you wish to approve from the Department dropdown. That displays a list of timesheets you can approve.

a. You can use the Work Area field to sort and view your timesheets by a specific work area.

b. You can use the Search By field to search for a specific timesheet by Document ID, or Principal ID (University ID). Select the parameter you wish to search by and in the Value field, enter the specific value you want to find, and then click **Search**.

3. Review the **Summary** of hours for each week of the timesheet. You can click on the plus button next to the week to open a view of the timesheet summary section and view the hours recorded under each Assignment. [Click the minus button to close the Summary section.]

clockdetail1, indiana (10050)
Clocked out since: 10/01/2013 09:15 AM EDT

Doc Id: 3211
SAVED

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Week Totals	FLSA
− Week 1: (09/29 - 10/05)	0.00	8.00	10.50	8.00	8.00	8.00	0.00	42.50	42.50
RGH: Regular Pay Hourly									
IN-DEPT HR Work Area : $5.00 Rcd 1 IN-DEPT			2.50					2.50	
RGN: Regular Pay Non-Exempt									
IN-DEPT NE Work Area : $5.00 Rcd 0 IN-DEPT		8.00	8.00	8.00	8.00	5.50		37.50	
Regular Hours Totals		8.00	10.50	8.00	8.00	5.50		40.00	
OVT: Overtime									
IN-DEPT NE Work Area : $5.00 Rcd 0 IN-DEPT						2.50		2.50	
Overtime Hours Totals						2.50		2.50	
SHHR: HR Shift Earn Code									
IN-DEPT HR Work Area : $5.00 Rcd 1 IN-DEPT			0.50					0.50	
Other Totals			0.50					0.50	
+ Week 2: (10/06 - 10/12)	0.00	8.00	3.00	3.00	5.00	5.00	0.00	24.00	24.00
							Pay Period Total	66.50	

RGN: Regular Pay-BW1																
Accts Paybl : $00.00 Rcd 0 UA-FMOP		8.00	7.83	7.88	8.29	8		40.00		8	7.75	9.00	6.92	8.33		40.00	80.00
Regular Pay Hours		8.00	7.83	7.88	8.29	8		40.00		8	7.75	9.00	6.92	8.33		40.00	80.00

4. If necessary, enter any changes to the Time Blocks, leave hours or dollar amounts on the timesheet. You can also delete automatic meal deductions if an employee worked without taking a meal and you can also distribute work hours to the proper Assignments:

   a. Click on the Document Id to open that timesheet on the employee's *Time Detail* tab. In the calendar, you can now add, edit or delete regular Time Blocks, leave hours, or amounts.

      i. To add a new Time Block, or a block of leave hours or dollar amounts, click on a day, complete the fields on the 'Add Time Blocks' entry box and click **Add**.

      ii. To edit any Time Block on that timesheet, click on the underlined Assignment name within that block to open the 'Add Time Block' entry box. You can modify the Date Range, and/or the Earn Code. The fields in the entry box change based upon the Earn Code selected, so you may need to modify the In/Out times, the Hours, or the Amount to complete your correction. Then, click **Update**.

      iii. To delete any Time Block from the timesheet, click on the red 'X' button, in the upper right corner of the block. A confirmation message opens, asking you to click **OK** to confirm the delete, (or click **Cancel** to cancel it.)

      iv. To delete an automatic lunch or meal deduction, and credit the meal hour(s) as regular work hours, find the Time Block(s) with a lunch/meal deduction that needs to be removed. In the **yellow bar** showing the lunch/meal deduction, click on the red 'X' button, .

      v. (Optional step) To distribute work hours, go to the employee's *Clock* tab and click the **Distribute Time Blocks** button. On the *Time Blocks to Distribute* screen, select the Time Block you want to distribute and click **Edit**. This opens the *Distribute Hours* screen, which shows the selected Time Block and Hours at the top. In the form fields on that page, you can change the Begin Date and End Date, and enter or change the Begin Time and End Time, or assign the hours to another assignment by selecting that assignment in the Assignment field. Use the **Add** button to add more Assignment rows on the form. When finished, clock **Save**.

   b. When finished with this timesheet, click **Return** in the header to return to your *Time Approval* tab.

5. To approve this timesheet, click the “Approve” button in the Action column of the employee’s timesheet row or click the “Select” checkbox for that timesheet and click the **Approve** button at the bottom. This completes the approval, grays-out the Approve button for the timesheet. If timesheet requires payroll processor approval, “Payroll Processor” label will appear above the disabled “Approve” button. If Approver is the final step for the timesheet, clicking refresh will update the ‘Status’ field of the timesheet to show “Final.”

To approve more than one timesheet or to do bulk approvals:

1. Log in to KPME Time and go to the *Time Approval* tab.
2. Select the department you wish to approve from the Department dropdown. That displays a list of timesheets you can approve.
   - You can use the Work Area field to sort and view your timesheets by a specific work area.
3. Review the timesheet **summary** of hours information for each employee. You can click on the plus button, by the week to pop open a ‘summary view’ which shows you the hours that employee recorded, by Assignment. [Click the minus button to close up the summary.]
4. If necessary, enter any changes to the Time Blocks, leave hours or amounts on these timesheets, and/or delete any automatic lunch or meal deductions if an employee worked without taking a meal, and/or distribute work hours:
   a. Click on the Document Id, which opens that timesheet on the employee’s *Time Detail* tab. In the calendar, you can add, edit or delete regular Time Blocks, leave hours or amounts.
      i. To add a new Time Block, or a block of leave hours or dollar amounts, click on a day, complete the fields on the ‘Add Time Blocks’ entry box and click **Add**.
      ii. To edit any Time Block on that timesheet, click on the underlined Assignment name within that block to open the ‘Add Time Block’ entry box. You can modify the Date Range, and/or the Earn Code. The fields in the entry box change based upon the Earn Code selected, so you may need to modify the In/Out times, the Hours, or the Amount to complete your correction. Then, click **Update**.
      iii. To delete any Time Block from the timesheet, click on the red ‘X’ button, in the upper right corner of the block. A confirmation message opens, asking you to click **OK** to confirm the delete, (or click **Cancel** to cancel it.)
      i. To delete an automatic lunch or meal deduction, and credit the meal hour(s) as regular work hours, find the Time Block(s) with the lunch/meal deduction that needs to be removed. In the **yellow bar** showing the meal deduction, click on the red ‘X’ button, .
      iv. (Optional step) To distribute work hours, go to the employee’s *Clock* tab and click the **Distribute Time Blocks** button. On the *Time Blocks to Distribute* screen, select the Time Block you want to distribute and click **Edit**. This opens the *Distribute Hours* screen, which shows the selected Time Block and Hours at the top. In the form fields on that page, you can change the Begin Date and End Date, and enter or change the Begin Time and End Time, or assign the hours to another assignment by selecting that assignment in the Assignment field. Use the **Add** button to add more Assignment rows on the form. When finished, clock **Save**.
   b. When finished with the timesheet, click **Return** in the header to return to your *Time Approval* tab.
   c. Repeat this step (step 4) for each timesheet you need to adjust.
5. To mark a timesheet in your list for approval click the “Select” checkbox for that timesheet. You canselect more than once timesheet in your list to approve.

6. To mark all timesheets in your list for bulk approval, use the select “all” checkbox at the top of the ‘Select’ column. This will select all timesheets that are available to be approved.
7. To take the bulk approval action, click the “**Approve**” button at the bottom of the timesheet list. This completes the approval, grays-out the Approve button for those timesheets. If timesheet requires payroll processor approval, “Payroll Processor” label will appear above the disabled “Approve” button. If Approver is the final step for the timesheet, clicking refresh will update the ‘Status’ field of the timesheet to show “Final.”

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

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 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.

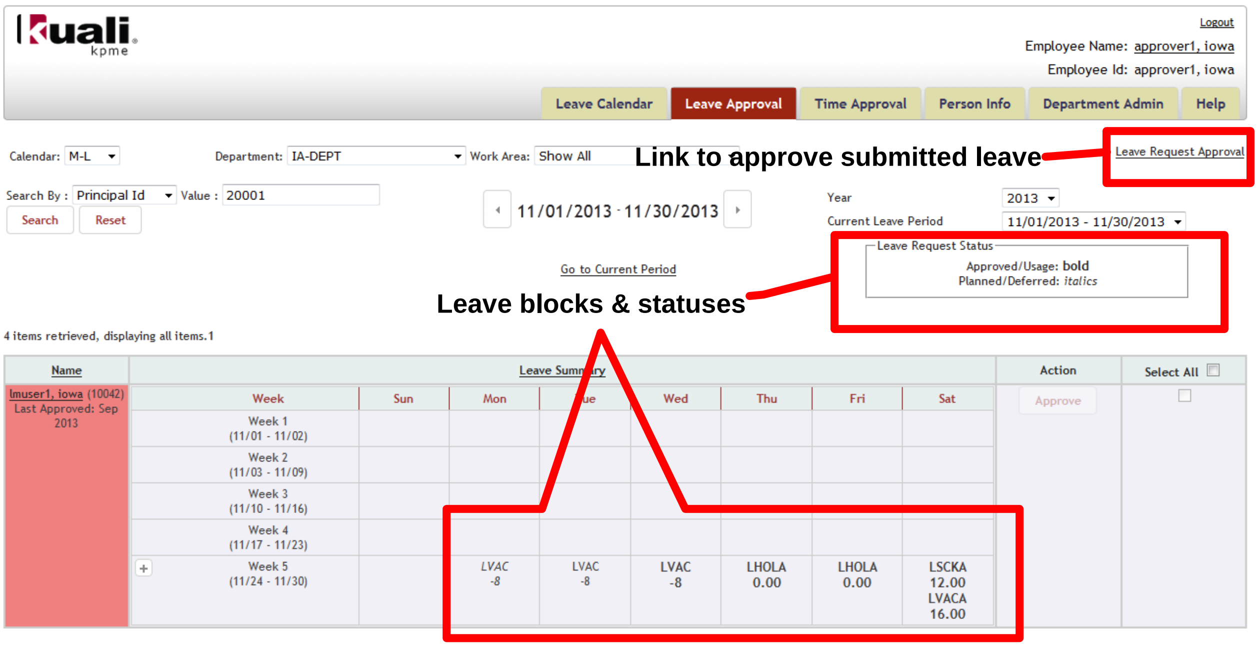
- The Pending Action Requests section shows who still needs to take action on the document. It is possible that multiple requests exist at the same Time. This situation will occur if the employee has multiple KPME Assignments with different Approvers.

- The Future Action Requests section shows who will need to take future action on the document.

Leave Calendar Monitoring, Reviewing and Correcting

During the leave calendar's reporting period, and before calendars are routed for approval, you can use the *Leave Approval* tab to open your '**monitor and approval**' page. This page provides a "one-stop" portal to monitor, clean-up and approve your employee's leave calendar and leave requests. Navigation of the *Leave Approval* tab is similar to the *Time Approval* tab described earlier in this document.

On the Leave Approval page, a list of employees you supervise will appear with options to filter by department and work area. Non-exempt employees that report leave on their timesheet are displayed to show leave active (usage and accruals) and summary with period usage and available balances. The Leave Approval page for exempt employees will be used to approve previous leave calendars where the employee reported leave usage. All employees future leave calendars periods will show planned, requested and approved leave.



For the current and previous leave calendars, the status of each leave calendar document is displayed (saved, enroute, or final).

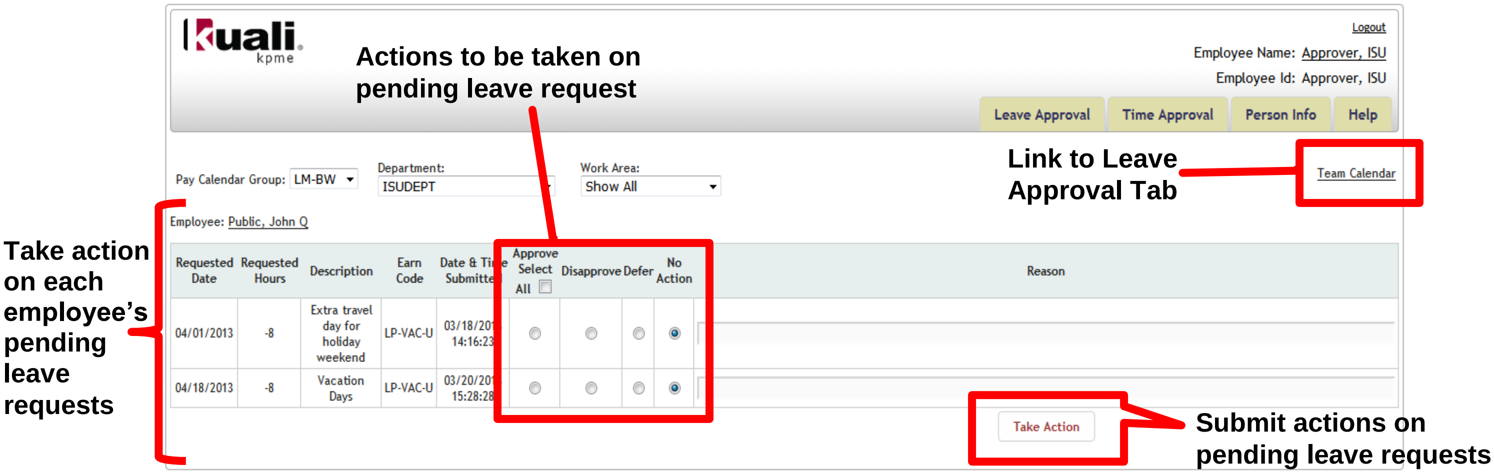
You can roll your cursor over icons that open up "quick views" of Notes and Warnings, and clickable icons are provided to open (and close) a brief leave summary view on an employee's leave calendar. Warnings can be a Max Balance action occurred on a leave calendar such as pending balance transfer or payout requires those documents to be approved prior to approving that leave calendar.

Leave calendars can be opened from the *Leave Approval* tab by clicking on the Document ID number. Here you can add, edit, or delete Leave Blocks for the employee.

When a leave calendar or set of leave calendars are ready to approve, you will use the Approve buttons on this tab to do your approvals.

Leave Request Approval

When an employee submits leave request for approval, the approver will see the request in their action list and be directed to the Leave Request Approval page that lists all of the pending leave requests for their employees. This page can also be accessed via the Leave Request Approval link on Leave Approval tab.



Pending leave requests will be listed grouped by each employee. An approver can approve each leave request individually or act on all of an employee's pending requests. "Select All" checkbox will select approve option for all of the employee's leave requests. Disapprove and Defer requires a Reason to be entered. Deferred leave requests will return to the employee's leave calendars as a planning leave block that the employee can resubmit at a later date for approval. Leave requests with No Action selected will remain as a pending leave request.

Leave Calendar Approval and Routing

Routing and approval of exempt employees' leave calendars is similar to the non-exempt employee's timesheet approval routing. The employee will submit leave calendars after the calendars reporting period. The latest leave calendar cannot be submitted until previous calendars have been submitted for approval.

Leave calendars are routed from the employee to Approver(s) using Workflow. The employee's work area(s) determine the first level of approval. Some work area may also record a second level approver from their department's Payroll Processor. When you log into the system as an Approver, you will see the *Leave Approval* tab. Here you can see all the exempt and non-exempt employees you supervise and their recorded leave. Only exempt employees will have leave calendars to approve from this tab with non-exempt employees leave being approved with their timesheet.

Leave accrual balances in the leave summary can be viewed by clicking the plus icon button to verify balances have not been exceeded. You can also click on the underlined Document ID number to open that leave calendar and view details of the leave taken during that reporting period.

Also note under each employee's name, you can view the last approved leave calendar. Leave calendars must approved in chronological order so a submitted leave calendar will not be available to approve until the previously submitted leave calendars are approved. If 2 or more previous leave calendars have not been approved the employee's name will be shaded in red.

A 'Status' is shown of the current routing status of each leave calendar. A status of "SAVED" indicates a leave calendar was created and is still in the employee's hands. A status of "ENROUTE" indicates the employee has submitted the leave calendar to route it for approval, and a status of "FINAL" indicates the leave calendar was approved and is final.

When a leave calendar is ready to be approved, the "Action" column will show an active "Approve" button. Above that button will display the route level the approval is for, Approver or Payroll Processor. To bulk approve leave calendars that area ready to approve, click the 'select' box next to the employee you wish to approve and click the

Approve button at the bottom. After doing an approval action, click the “Refresh” button at the bottom to update the document statuses. This completes the approval and any notifications are removed from your Action List.

Some leave calendars may have pending actions that prevent them from being approved. These leave calendars will typically have a warning message indicating a max balance action occurred on the leave calendar and a balance transfer or payout document needs approved prior to the leave calendar being approved. Non-exempt employee with pending balance transfer or payout document will have a warning displayed on both the *Time Approval* and *Leave Approval* tab records.

KPME 2.0 implementations have the option to automatically approve submitted leave calendars at designated times. The automated process is not to be in lieu of Approvers reviewing and correcting timesheets.

More Options for Administrators

This section discusses other options that KPME2.0 provides for Administrators, which were not discussed in the previous sections of this manual. It also includes a brief review of how to view the timekeeping and leave rules set up for your department.

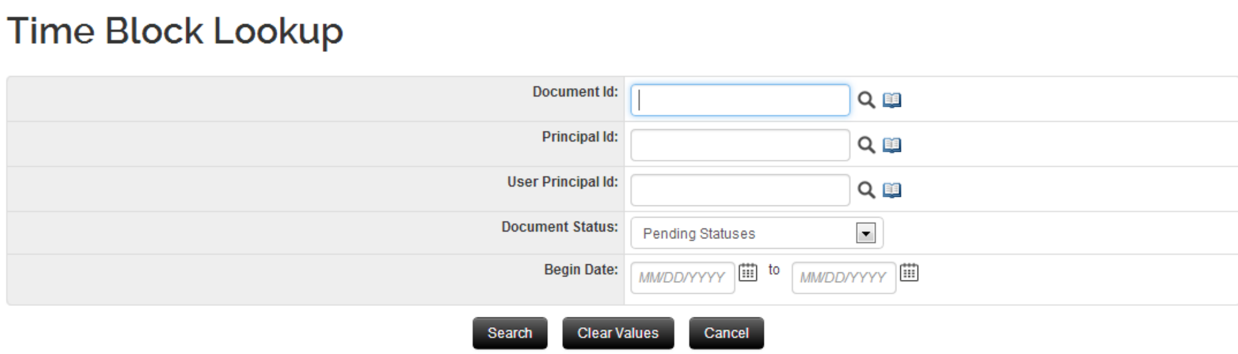
Using Inquiry Pages

On the *Department Admin* tab, KPME provides four Inquiry screens that are useful tools to look at the time blocks recorded on a timesheet, to view the history of time blocks added or deleted from a timesheet, to see the clock transactions logged by an employee, and to find any missed clock punch documents submitted by or for an employee.

Time Block Inquiry

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

Important! Time Blocks are never deleted from the system, they are just inactivated.



To perform a Time Block Inquiry, follow these steps:

1. Log into KPME, go to the *Department Admin* tab, and 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.
3. You can search by other criteria including the Principal Id and Document Status.
4. Time Blocks within a specified date range can be search.
5. Click **Search**.

   The result of this search is displayed in a tabular format and includes: Document ID, Principal ID, Job Number, User Principal ID, Earn Code, Work Area, Task, Hours or Amount, and Begin Time and End Time.

Show 10 entries

csv xml xls

Actions	Document Id	Principal Id	Job Number	User Principal Id	Earn Code	Work Area	Task	Hours	Amount	Overtime Preference	Lunch Deleted	Begin Time	End Time
view	3219	10101	0	10099	RGN	1400	0	9			false	09/30/2013 09:00 AM	09/30/2013 06:00 PM
view	3219	10101	0	10099	RGN	1400	0	9			false	10/01/2013 09:00 AM	10/01/2013 06:00 PM
view	3292	10045	0	10046	RGN	1200	0	10			false	10/09/2013 08:00 AM	10/09/2013 06:00 PM
view	3292	10045	0	10046	RGN	1200	0	10			false	10/10/2013 08:00 AM	10/10/2013 06:00 PM
view	3292	10045	0	10046	RGN	1200	0	10		OVT	false	10/11/2013 08:00 AM	10/11/2013 06:00 PM
view	3487	20002	0	20002	RGH	1107	0	7.17	0		false	10/03/2013 04:50 PM	10/04/2013 12:00 AM
view	3487	20002	0	20002	RGH	1107	0	7.32	0		false	10/04/2013 12:00 AM	10/04/2013 07:19 AM
view	3287	10038	0	10038	RGH	1202	0	2	0		false	10/03/2013 11:00 PM	10/04/2013 01:00 AM
view	3287	10038	0	10038	RGH	1202	0	8.76	0		false	10/04/2013 01:00 AM	10/04/2013 09:45 AM
view	3650	20011	0	admin	RGH	1107	0	7.09	0		false	10/05/2013 04:54 PM	10/06/2013 12:00 AM

Showing 1 to 10 of 55 entries

First Previous 1 2 3 4 5 Next Last

6. (Optional step) You can click on the “view” link in the results, to open a page that shows a full description of that Time Block. The details displayed are the Job Number, Work Area, Earn Code, Begin Time, End Time, and the Hours or Amount, along with a confirmation indicating whether or not the entry was logged by the clock.

   At the bottom of the page, are the Time Hour Details, which show the Earn Code, Hours and/or Amount, (including any minutes deducted for a lunch meal). Click **Back** to exit this page.

Time Block Inquiry

Expand All | Collapse All

TimeBlock Id:	10037
Document Id:	3219
Job Number:	0
Work Area:	1400
Earn Code:	RGN
Begin Time:	09/30/2013 09:00 AM
End Time:	09/30/2013 06:00 PM
Hours:	9
Amount:	
Clock Log Created:	false
User Principal Id:	10099
Principal Id:	10101
Overtime Preference:	
Lunch Deleted:	false
Time Stamp:	09/29/2013 11:23 PM

Time Hour Details

Earn Code:	RGN
Hours:	9
Amount:	

7. Click **Back** to close the search results page and return to the *Department Admin* tab.

Time Block History Inquiry

Reviewers, Approvers, and Department Administrators who have employees in KPME 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.

Important! Time Blocks are never deleted from the system, they are just inactivated.

Time Block History Lookup

Document Id:	
Principal Id:	
User Principal Id:	
Document Status:	Pending Statuses
Begin Date:	MM/DD/YYYY to MM/DD/YYYY
Modified Time:	MM/DD/YYYY to MM/DD/YYYY

Search | Clear Values | Cancel

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

1. Log into KPME, go to the *Department Admin* tab, and in the Inquiries column, click the "Time Block History Inquiry" link.
2. Enter the Document ID of the timesheet you want to view the history of any Time Blocks clocked, added,

or deleted on that particular timesheet.

- You can also search by other criteria including the Principal Id (employee), User Principal Id (person who added/removed the Time Block), Document Status, and the Date From and Date To fields.

3. Click **Search**.

The results of this search are displayed in a tabular format and include: Document ID, Principal ID, User Principal ID, Work Area, Task, Job Number, Earn Code, Begin Time and End Time, and Hours or Amount, along with a confirmation indicating whether or not the action was recorded in the clock log, and what Action History was performed on that Time Block (add, update, or delete).

Show 10 entries

csv xml xls

Actions	Document Id	Principal Id	Time Block Id	Work Area	Task	Job Number	Earn Code	Begin Time	End Time	Hours	Amount	Clock Log Created	Action History	User Principal Id	Modified Time
view	3219	10101	10037	1400	0	0	RGN	09/30/2013 09:00 AM	09/30/2013 06:00 PM	9	0	false	addTimeBlock	10099	09/29/2013 11:23 PM
view	3219	10101	10038	1400	0	0	RGN	10/01/2013 09:00 AM	10/01/2013 06:00 PM	9	0	false	addTimeBlock	10099	09/29/2013 11:23 PM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10065	1100	0	0	RGN	10/10/2013 08:00 AM	10/10/2013 08:00 PM	12	0	false	updateTimeBlock	10056	10/02/2013 11:35 AM
view	3214	10056	10066	1100	0	0	RGN	10/11/2013 08:00 AM	10/11/2013 08:00 PM	12	0	false	addTimeBlock	10056	10/02/2013 11:35 AM

Showing 1 to 10 of 71 entries

First Previous 1 2 3 4 5 Next Last

5. (Optional step) You can click on any of these following active links in the search results (view, Document ID, Time Block ID) to open a full description of that historical Time Block. The details shown in this Inquiry screen are the User Principal ID, Time Stamp, Document ID, Job Number, Work Area, Earn Code, Begin Time, End Time, Hours or Amount, along with the Clock Log Created confirmation and the Action History indicator.
6. (Optional step) You can click on the (underlined) Principal ID or User Principal ID links in the search results to open an Inquiry screen for that person, which shows their Kuali Affiliation Type (staff, guest, student), along with their basic job information.
7. (Optional step) If you open any Inquiry page, click **Back** to exit from it.
8. Click **Cancel** to close the search results page and return to the *Department Admin* tab.

Clock Log Inquiry

Reviewers, Approvers, and Department Administrators who have employees in KPME 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. Log into KPME, go to the *Department Admin* tab, and in the Inquiries column, click the "Clock Log" link.
2. In the Clock Log Lookup, enter the Document ID or Principal ID of the timesheet or employee you wish to view. (You can also search by other criteria including Work Area, Task, IP Address or Clock Timestamp From and Clock Timestamp To.)
3. Click **Search**.

   The results of this search are displayed in a tabular format and include: Document ID, Principal ID, Work Area, Task, IP Address, Clock Action, Job Number, User Principal ID, Clock Timestamp, Clock Timestamp Timezone, and Timestamp, Clocked by Missed Punch.

200 items retrieved, displaying 1 to 100.[First/Prev] **1**, 2 [Next/Last]

Actions	Document Id	Principal Id	Work Area	Task	IP Address	Clock Action	Job Number	User Principal Id	Clock Timestamp (MM/DD/YYYY HH:MM AM)	Clock Timestamp Timezone	Timestamp	Clocked By Missed Punch
edit view	3183	10038	1202	0	67.224.44.225	CI	0	10038	09/28/2013 07:00 AM	America/Chicago	09/28/2013 01:03 PM	Yes
edit view	3184	10039	1202	0	67.224.44.225	CI	1	10039	09/28/2013 04:31 PM	America/Chicago	09/28/2013 04:31 PM	No
edit view	3168	10049	1102	0	67.224.44.225	CI	0	10049	09/28/2013 04:33 PM	America/Indiana/Indianapolis	09/28/2013 04:33 PM	No
edit view	3169	10050	1102	0	67.224.44.225	CI	1	10050	09/28/2013 04:34 PM	America/Indiana/Indianapolis	09/28/2013 04:34 PM	No

4. (Optional step) If you click on an employee's (underlined) Principal ID, Work Area, or Task, it is a link that opens an Inquiry page which shows details about that person, work area or task. Click **Close** to exit this Inquiry page.
5. Click **Cancel** to close the search results page and return to the *Department Admin* tab.

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 and clock outs, or missed lunch outs and returns from lunch.

To perform a Missed Punch Inquiry, follow these steps:

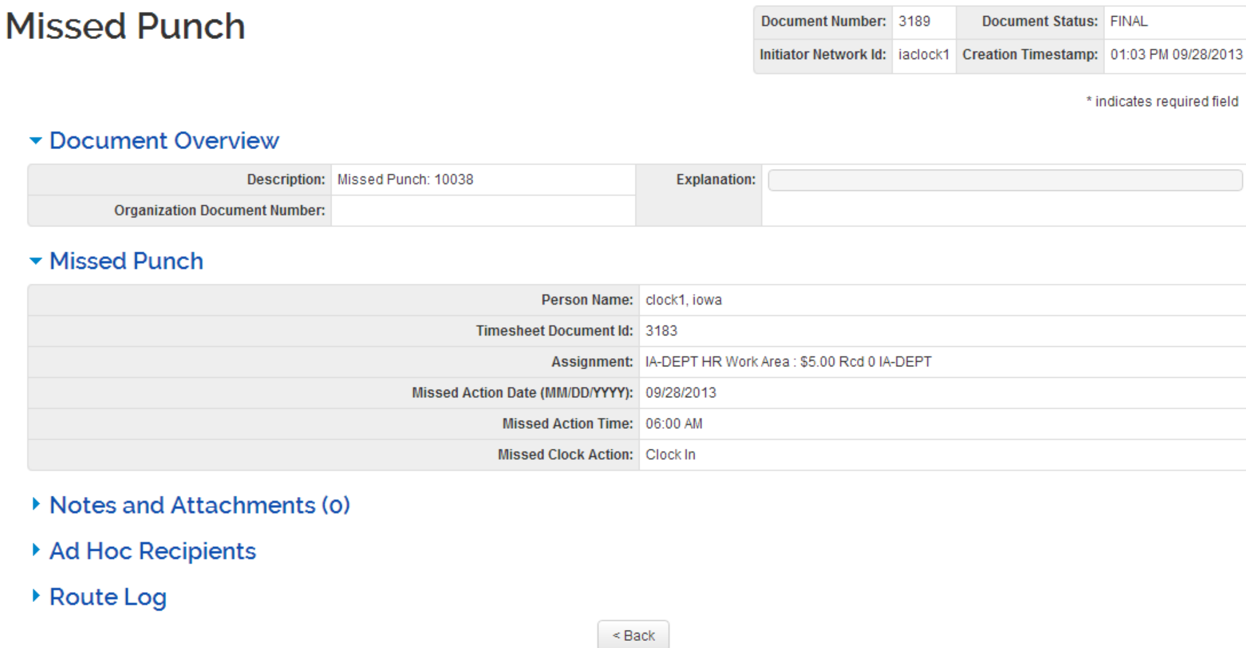
1. Log into KPME, go to the *Department Admin* tab, and in the Inquiries column, click the "Missed Punch" link.
2. This opens the Document Lookup screen:
   - Enter the Document ID of the Missed Punch document that was submitted by the employee.
   - If you don't have the Document ID, go to the Document Type field, and input the value, MissedPunchDocument (enter capitals at the start of each word with no spaces between them) or else verify that this value is already showing in the field. Then, search for any Missed Punch documents by Initiator (username of the employee), or by a date range in the Date Created From and Date Created To fields.

   HINT: 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.

The information displayed in the search results includes the Person Name, Timesheet Document ID, Assignment, Missed Action Date Time and Missed Clock Action.

4. Click on the "view" link to open a copy of the Missed Punch Document that was submitted for an Assignment so you can view the clock action, and date and time of the punch that was missed.



5. Click **Back** to close the Missed Punch Document and return to your search results.
6. Click **Cancel** to close the search results page and return to the *Department Admin* tab.

Timekeeping Rules

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.

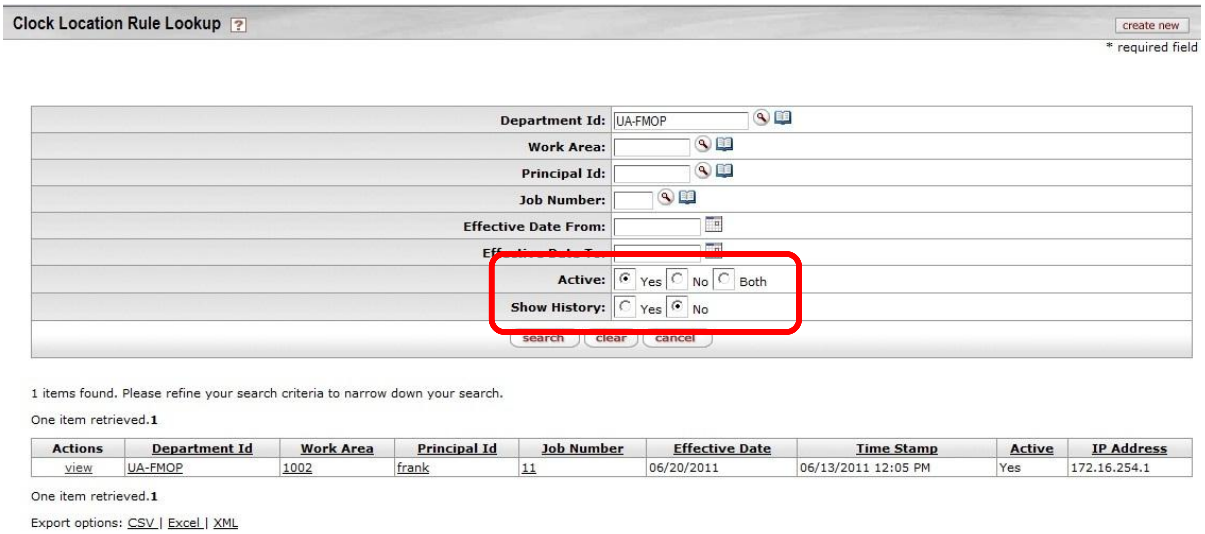
Active: The purpose of this radio button is to allow you to filter rows based on their active status.

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

Rule Look-up Example

In the example below (for Clock Location Rule), we entered a Department ID (UA-FMOP) and clicked **Search**.

(By default, the ‘Show History’ button is set to “No” and the ‘Active’ button is set to “Yes,” to find the highest effective dated row.) This search found the active rules established for our sample department.



In this example, the rule results retrieved show the date and time 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.

In general, the results retrieved when doing a rule search, displays values for many of the fields used as search criteria on that specific Rule Lookup screen. It always shows the Effective Date (of that rule), and whether or not the rule is Active.

The KPME system provides the following **Departmental Rule**s that you may be able to view, if applicable, for your department:

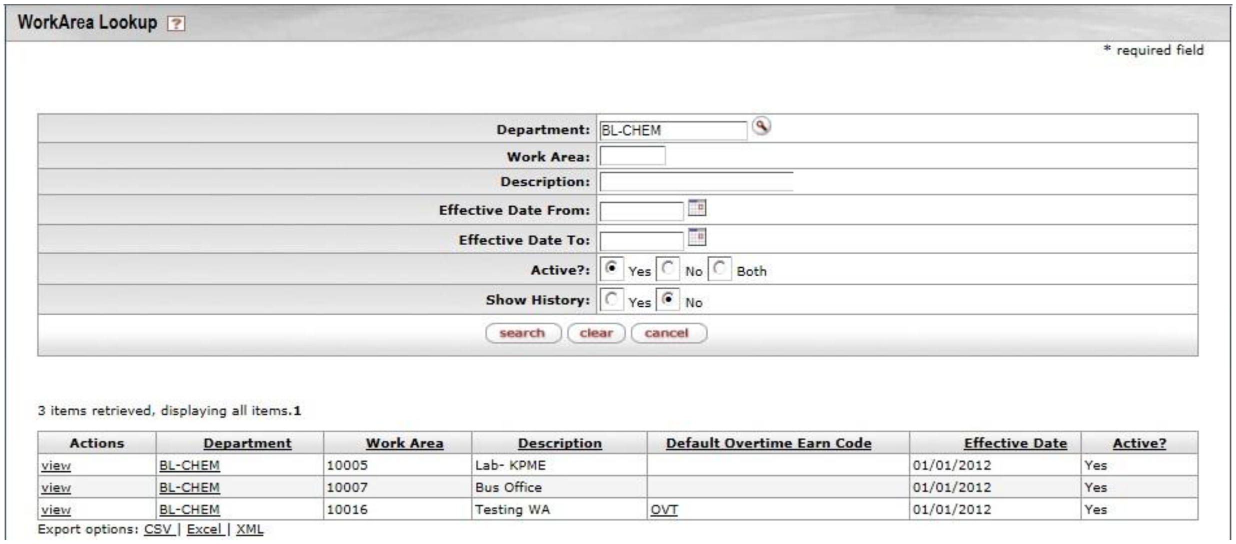
- Clock Location
- Department Lunch Deduction
- Time Collection (sets employee as Clock-Entry vs. Manual-Entry)

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

Viewing Work Area Maintenance

You can use the **Work Area Maintenance** Lookup to view information about the work areas in your department. Click on the Work Area Maintenance link under the HR/Payroll column to open the **Work Area Maintenance** Lookup.

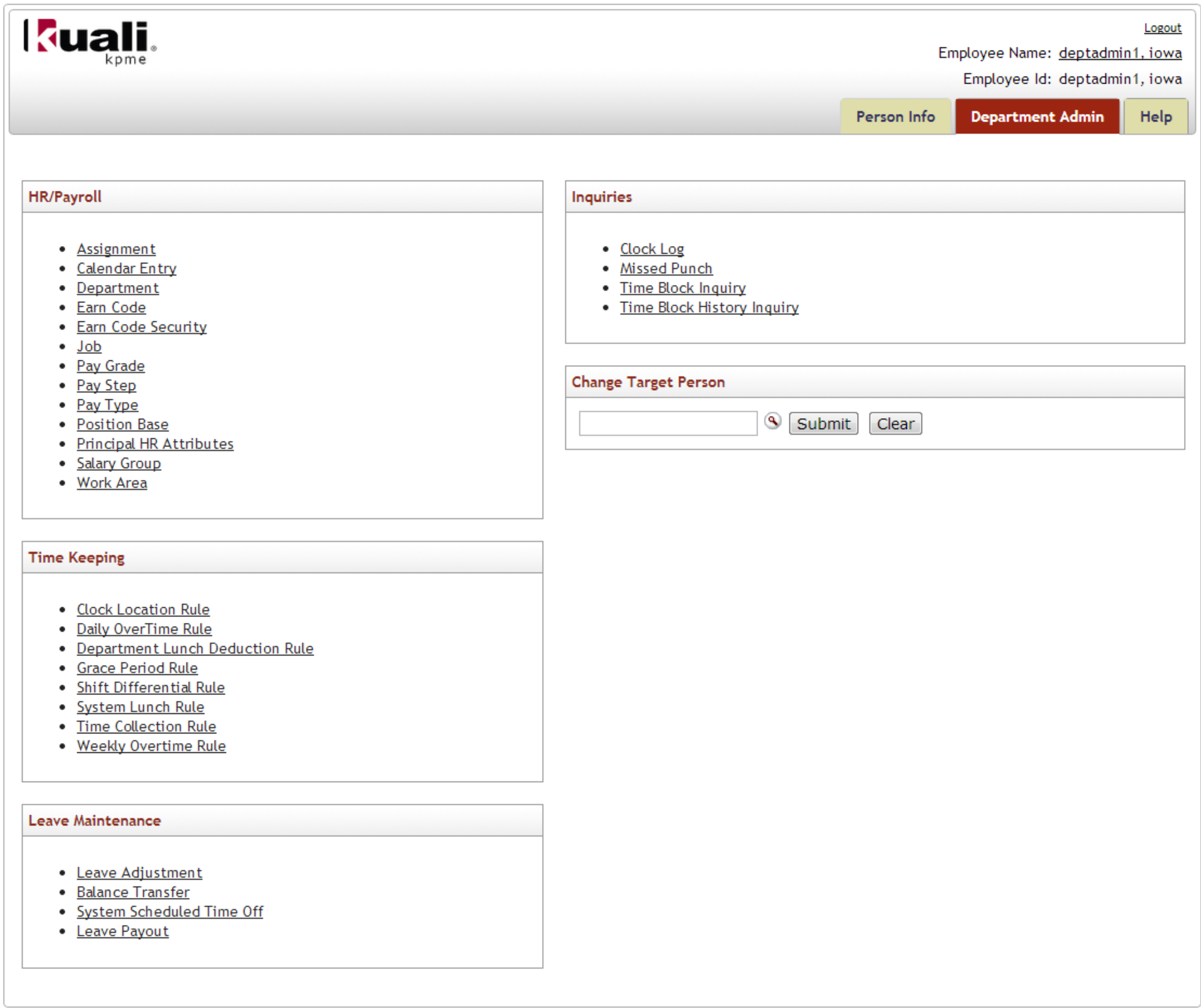
The results of a search on this lookup screen will show you the Department, the Work Area Description, the Effective Date, the Default Overtime Earn Code, and if it is an ‘Active’ work area.



Department Administrator Options

As a Department Administrator, when you open the *Department Admin* tab you will see links to the Maintenance pages for Timekeeping, Leave, Administrative and HR/Payroll functions, and Inquiries (see illustration below).

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



Timekeeping Rules

Department Administrators can establish and maintain business rules that determine how their department will interact with KPME 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 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.

A few departmental rules are 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 the Departmental Lunch Deduction rule, or 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 129.29.29.10. KPME Time will not in any way stop an employee from clocking in or out at a different workstation, but the timesheet will display a Warning message (that stays with the timesheet) indicating the employee clocked elsewhere.

The Time Collection rule differs from the other rules in that it impacts what options will be available for employees to record their work hours. It determines whether a time Assignment for a Work Area will be Clock-Entry or Manual-Entry.

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 ATHL.

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
01/01/2013	UA-FMOP	@	@	@	A
09/01/2013	UA-FMOP	@	@	@	B

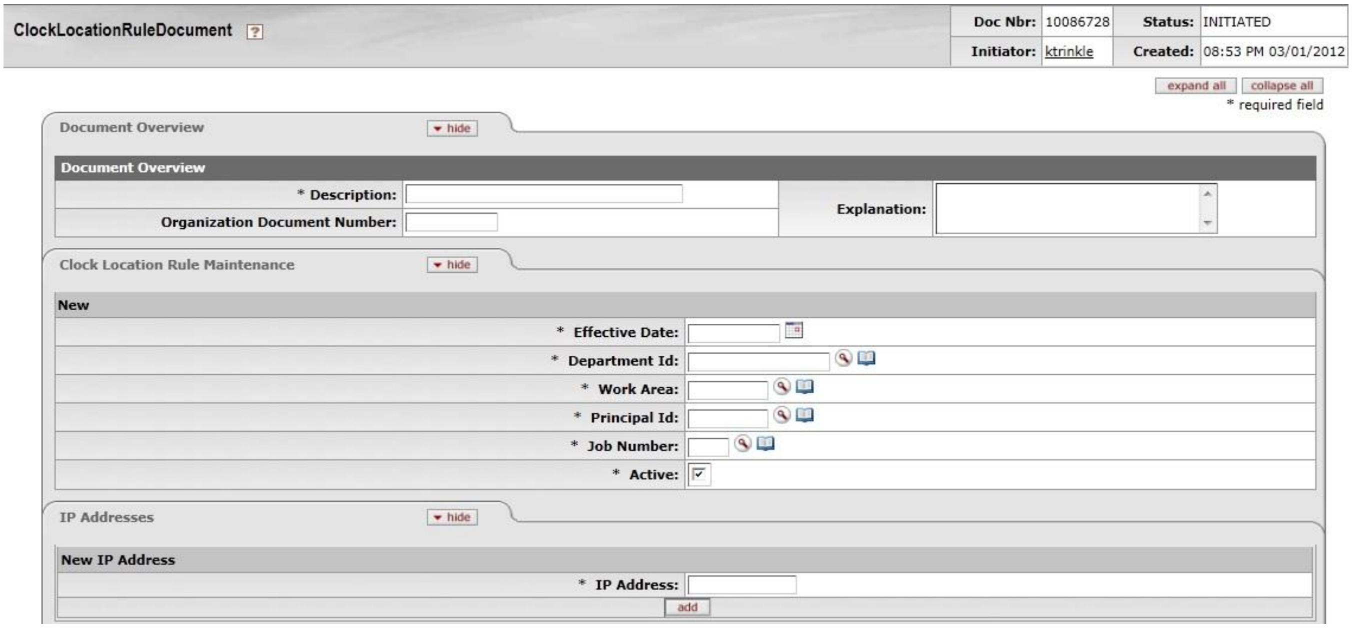
In this case, rule A would be in effect starting on January 1st, 2013 and would stay in effect through August 31st, 2013. Beginning on September 1st, 2013 rule B would take effect.

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.

Creating a New Rule

In the ‘Time Keeping’ 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 (see document example below).



You must enter or select values in all **required** fields. (Required fields are marked by an asterisk.)

Enter a Description at the top of each rule document, enter the Effective Date (which will be the date when the new rule takes effect), and enter your Department ID. Next, enter values for the Work Area, Principal ID, and Job Number, and then verify the 'Active' checkbox is checked.

Using Wildcards

You can enter the % (percent sign) as a 'wildcard' value in the Work Area, Principal ID and Job Number fields. When you enter the percent sign, % in a required field, it indicates you want this rule to affect ALL Work Areas, ALL Principal ID's or ALL Jobs.

Note: For the **Clock Location Rule** document (shown in the illustration above) you are also required to add one or more IP Addresses to specify Clock Locations. In the IP Address field, enter a valid IP address, (for example 200.200.95.10 or 200.200.95.%) and then click **Add**. Repeat this step for each IP Address you need to add.

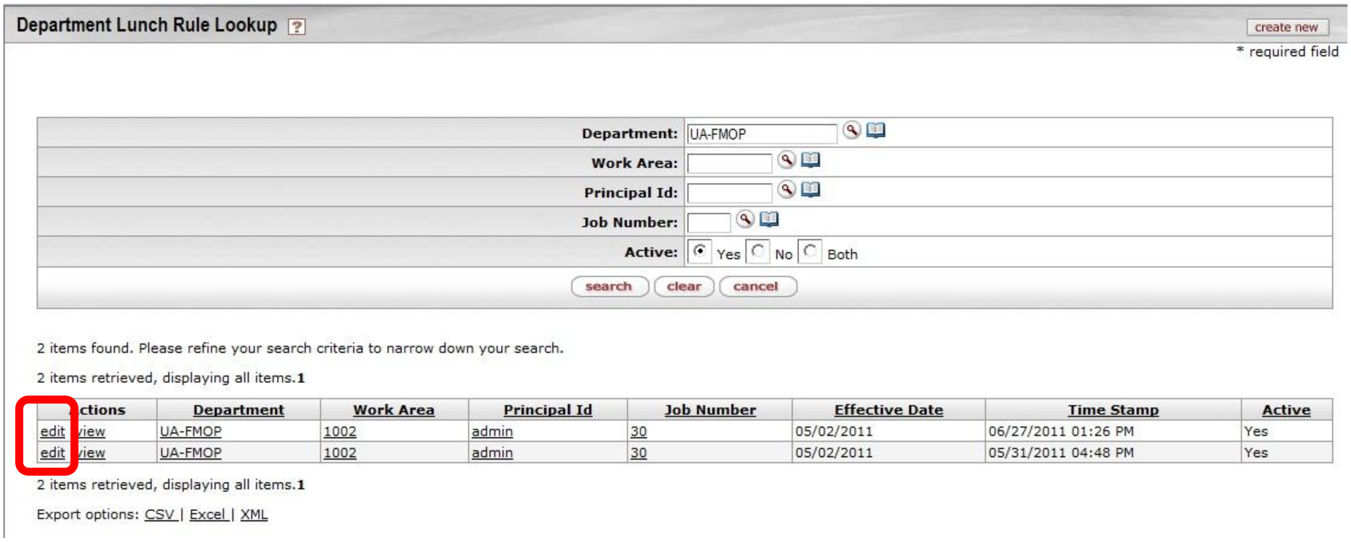
Note: For the **Department Lunch Deduction Rule** document, you are also required to add the number of Lunch Deduction Minutes to be deducted (usually 30 or 60), and the minimum number of Shift Hours an employee must work before the meal break is deducted.

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

Editing a Rule

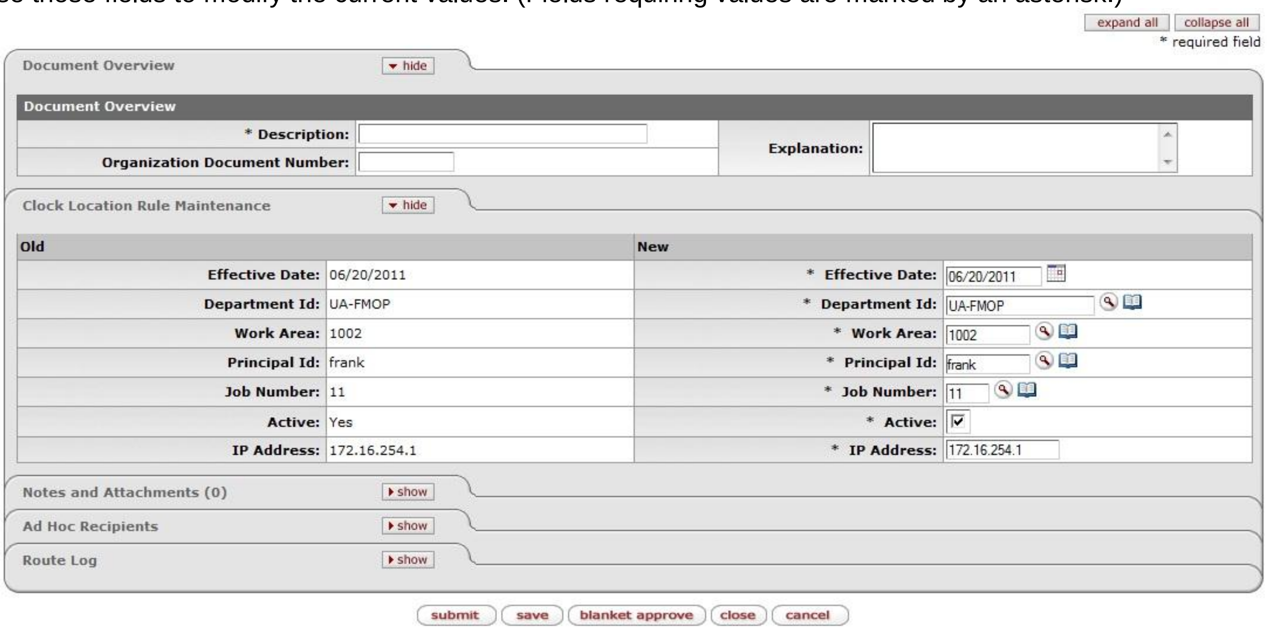
To edit an existing rule, under the 'Time Keeping' column, select the rule you want by clicking on the link (underlined name of the rule), and that opens the rule Lookup screen.

Enter your search criteria (e.g., Department ID and/or Work Area) to lookup the rule you want to edit. Once you find that rule in your search results, go to the 'Actions' column and 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 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.

Inactivating a Rule

To inactivate an existing rule, go to the *Department Admin* tab and then the 'Time Keeping' column, and select the rule you want by clicking on the link (underlined name of the rule). That opens the rule Lookup screen.

Enter your search criteria (e.g., Department ID and/or Work Area) to lookup the rule you want to inactivate. Once you find that rule in your search results, go to the 'Actions' column and 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.

You must enter a Description at the top of each rule document and enter an Effective Date (which is the date when the rule will no longer apply). Find the "Active" box in the left pane under '**New**' and UNCHECK it.

When finished, click the **Submit** button, and then click **Close** to close out of the rule document. This will inactivate the rule on the effective date you entered.

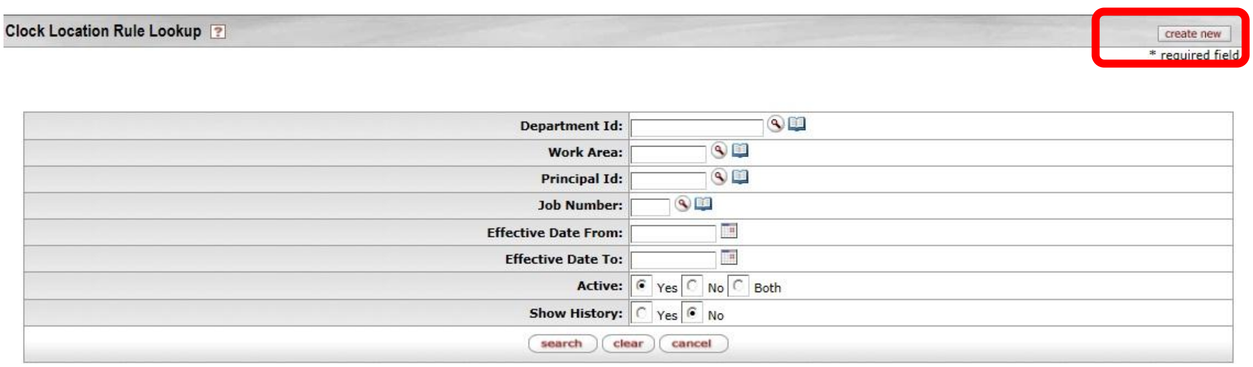
Clock Location Rule

Use this rule to specify that you want a particular group of employees to clock in and out from a specific location.

Clock Location: Please specify the IP Address of the computer where you want your Clock-Entry employees to clock in and out. You can specify more than one IP address as the workstation locations where your employees can clock. 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. Log into KPME, go to the *Department Admin* tab, and click on Clock Location Rule link.



2. This opens the Clock Location Rule Lookup:
   - To create a new rule, click **Create New** (and skip to step 4).
   - To edit (or inactivate) an existing rule, enter your search criteria—Department ID, Work Area, Principal ID and/or employee Job Number. Other lookup parameters include Effective Date From and Effective Date To.   (Then, continue to step 3.)

HINT: Use the "%" symbol as a wildcard value in the Work Area, Principal ID, and Job Number fields to indicate "ALL."

3. Click "**Search**."   In the search results, find the rule that you want to edit (or inactivate) and go to the first column of that rule and click **edit**.
4. This opens the Clock Location Rule document:
   - If creating a new rule, the document is blank and required fields are marked with an asterisk (*).
   - If editing an existing rule it shows the "Old" values for that rule in the left pane and you can edit any of the appropriate fields in the right pane under "New."
   - If all you want to do is inactivate an existing rule, UNCHECK the "Active" box in the right pane under "New," and enter a (document) Description and the Effective Date when the rule will no longer apply. (Then, skip to step 11 and submit the document.)

a. Enter a document Description.

b. For Effective Date, enter (or verify) the date when you want this rule to take effect.

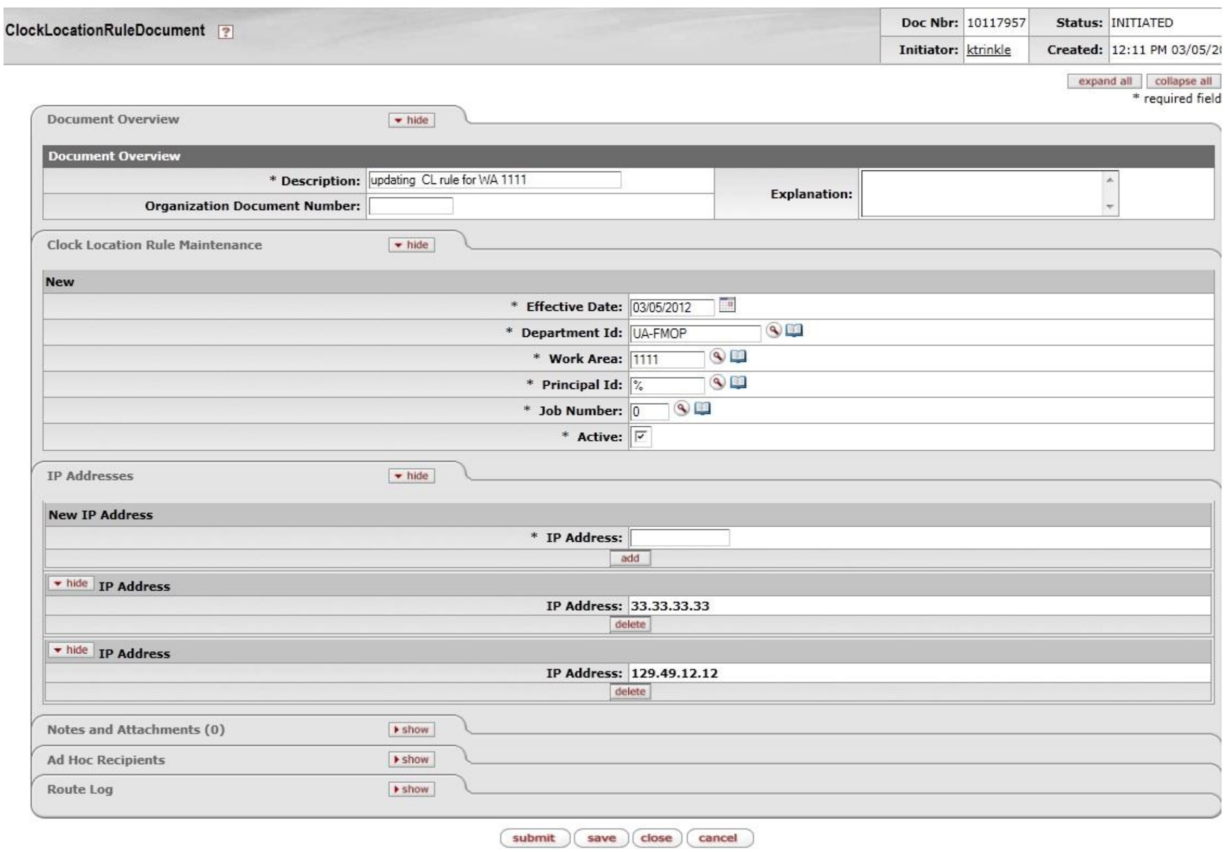
5. Enter (or verify) the Department Id is correct for your department.
6. Enter (or verify) the Work Area is correct. (You can enter % as a wildcard value to indicate "ALL" work areas.)
7. If you want this rule to affect only one employee in that Work Area, then enter a specific Principal ID. (You can enter % as a wildcard value to indicate "ALL" employees in the specified work areas.)
8. Enter (or verify) the Job *Number* is correct. (You can enter % as a wildcard value to indicate "ALL" job numbers for the specified employee(s).)
9. You can enter one or multiple IP Addresses as clock locations:

   a. Enter (or verify) the "IP Address" is correct—this is the IP address of the computer (or kiosk) that you wish this group of employees to clock in and out from.

   b. If you entered a new IP Address, click "**Add**" to add that address to the document.

   c. Click "**Delete**" to remove an existing IP Address that is no longer valid.

   d. Repeat this step (step 9) for each IP Address you need to add or delete.



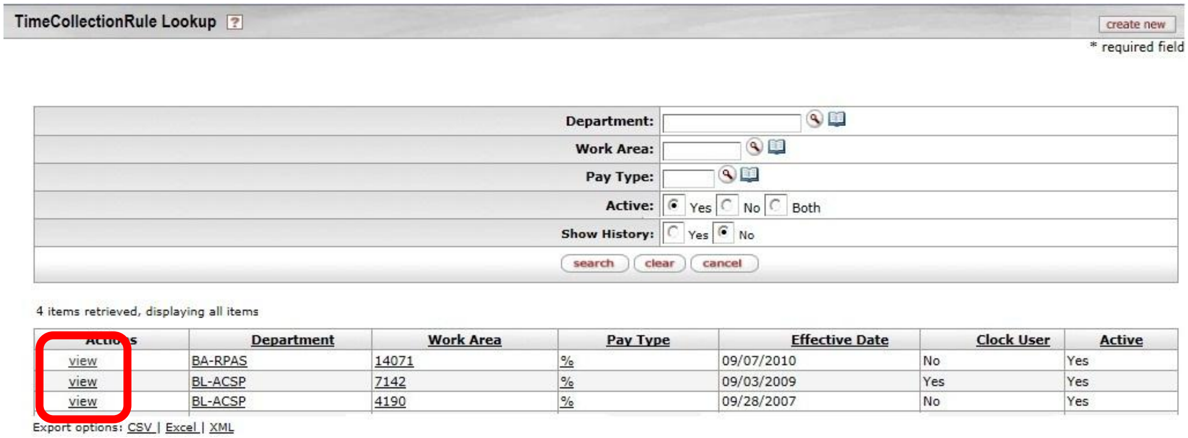
10. Leave the "Active" box checked as the default value, unless you want to undo a rule. (In that case, when you establish a new version of a rule, leave the "active" box unchecked.)
11. When finished entering, editing or verifying the rule settings are correct, click "**Submit**."
12. Click "**Close**" to close out of document.

Use this rule to **view** how the employees in your department will interact with KPME Time. Will they clock in and out (Clock-Entry) or will they record time blocks or leave hours directly on their timesheet (Manual-Entry)?

Time Collection Rule

Time Collection rules will follow University, Campus and/or Departmental polices concerning how employees should enter their time, so they are set up by the System Administrators.

1. Log into KPME, go to the *Department Admin* tab, and click on Time Collection Rule link.
2. On the Time Collection Rule Lookup, enter your search criteria—Department ID, Work Area and/or Pay Type.


TimeCollectionRule Lookup

create new

* required field

Department:

Work Area:

Pay Type:

Active: Yes No Both

Show History: Yes No

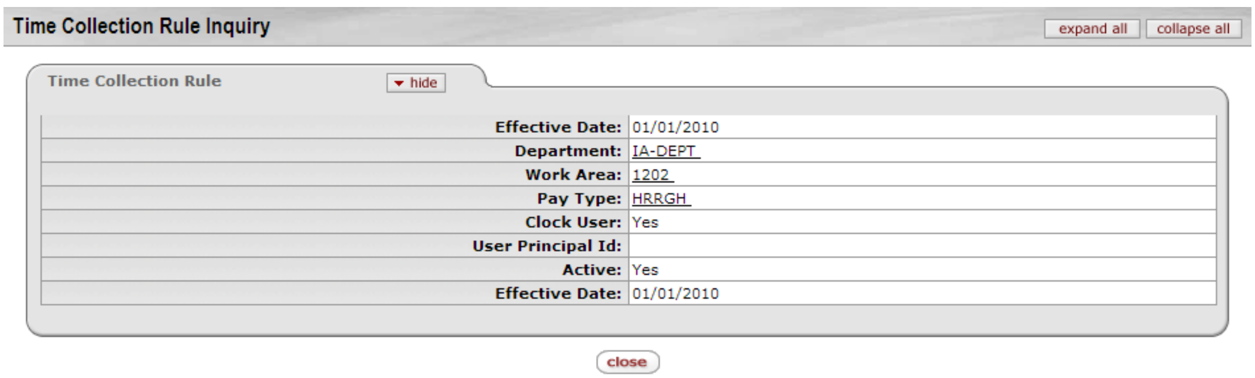
search clear cancel

4 items retrieved, displaying all items

Actions	Department	Work Area	Pay Type	Effective Date	Clock User	Active
view	BA-RPAS	14071	%	09/07/2010	No	Yes
view	BL-ACSP	7142	%	09/03/2009	Yes	Yes
view	BL-ACSP	4190	%	09/28/2007	No	Yes

Export options: CSV | Excel | XML

3. Click "**Search**."
4. In the search results, you can click the View link to open an Inquiry screen and view the rule details.


Time Collection Rule Inquiry

expand all collapse all

Time Collection Rule

hide

Effective Date:	01/01/2010
Department:	IA-DEPT
Work Area:	1202
Pay Type:	HRRGH
Clock User:	Yes
User Principal Id:	
Active:	Yes
Effective Date:	01/01/2010

close

5. Clock **Close** to close the inquiry view.
6. Click **Cancel** to close the search results page.

Department Lunch Deduction Rule

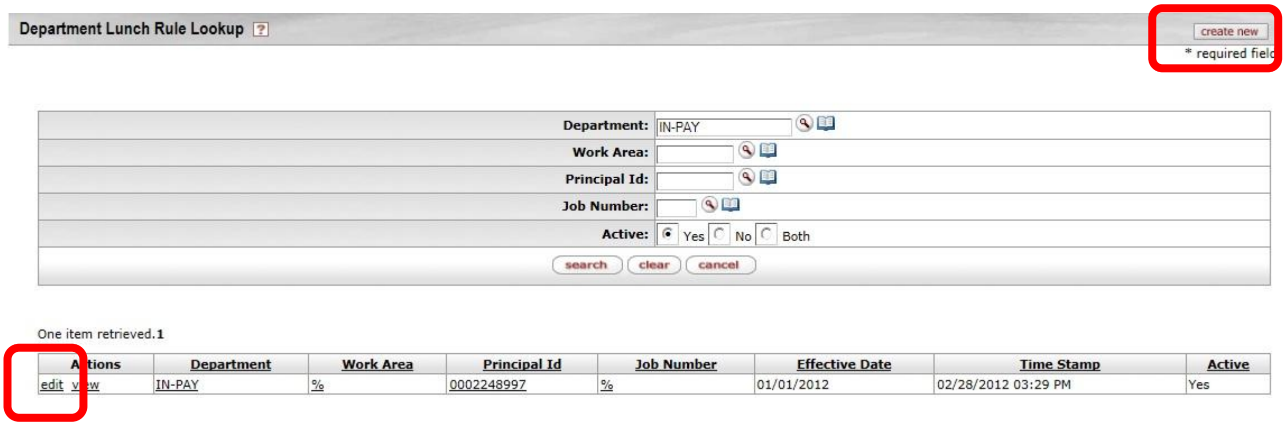
Use this rule for employees who clock in and out to determine the automatic deduction for their meal breaks.

Default Lunch Deduction: You can establish a default amount of meal hours (usually 30 minutes or 60 minutes) that are automatically deducted from the employee's work shift once they have worked the "defined" number of shift hours (usually a minimum of 6 hours).

Note: This rule does not apply to Manual-Entry employees.

1. Log into KPME, go to the *Department Admin* tab, and click on Department Lunch Rule link.
2. This opens the Department Lunch Rule Lookup:
   - To create a new rule, click **Create New** (and skip to step 4).
   - To edit (or inactivate) an existing rule, enter your search criteria—Department ID, Work Area, Principal ID and/or employee Job Number. (Continue to step 3.)

HINT: Use the "%" symbol as a wildcard value in the Work Area, Principal ID, and Job Number fields to indicate "ALL."



3. Click “**Search**.” In the search results, find the rule that you want to edit (or inactivate), go to the ‘Actions’ column (at left side of page) in that result row and click **edit**.
4. This opens the Department Lunch Rule document:
   - If creating a new rule, the document is blank and required fields are marked with an asterisk (*).
   - If editing an existing rule it shows the “Old” values for that rule in the left pane and you can edit any of the appropriate fields in the right pane under “New.”
   - If all you want to do is inactivate an existing rule, UNCHECK the “Active” box in the right pane under “New,” and enter a (document) Description and the Effective Date when the rule will no longer apply. (Then, skip to step 12 and submit the document.)
     a. Enter a document Description.
     b. For Effective Date, enter (or verify) the date when you want this rule to take effect.
5. Enter (or verify) the Department Id is correct for your department.
6. Enter (or verify) the Work Area is correct. (Enter % as a wildcard to indicate ALL work areas.)
7. Enter (or verify) the Principal ID is correct. If you want this rule to affect only one employee in that Work Area, then enter a specific Principal ID. ((Enter % as a wildcard to indicate ALL employees in the specified work area(s).)
8. Enter (or verify) the Job Number is correct. (Enter % as a wildcard to indicate “ALL” job numbers for the specified employee(s).)
9. You can enter (or edit) the number of Lunch Deduction Minutes (usually 30 or 60 minutes).
10. Enter (or edit) the number of Shift Hours the employee must work before a meal is deducted (usually 6 hours).
11. Leave the “Active” box checked as the default value, unless you want to undo (inactivate) a rule. (In that case, when you establish a new version of a rule, leave the “Active” box unchecked.)
12. When finished entering, editing or verifying that the rule settings are correct, click “**Submit**.”
13. Click “**Close**” to close out of document.

Leave Maintenance Functions

Leave Department Administrators have access to initiated Leave Adjustments, Balance Transfers and Leave Payouts for their department’s employees.

Leave Adjustment: Ability to modify an employee’s accrual balance. On submit a Leave Adjustment leave block will be generated and displayed on their leave calendar. An employee will not have ability to modify their own leave balances.

Balance Transfers: Balance Transfer maintenance document is used by department admins or system admins to change leave from one Accrual Category to another. When the Balance Transfer document is final, leave blocks representing the transfer of leave will appear on the employee’s leave calendar.

Leave Payout: Payout maintenance document is used to payout earned accruals. Department or System Admins will submit this document to payout accruals at time of termination/retirement. Leave Payout documents will appear as a leave block on the calendar with the amount of leave paid out.

Administrative and HR/Payroll Functions

Department Administrators will use the **Work Area Maintenance** document to create new Work Areas and Tasks, to manage Approver roles, and to add temporary Approver delegates.

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

Tasks are optional sub-divisions of Work Areas. Assignments in KPME 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 on a particular project.

Work Area Maintenance

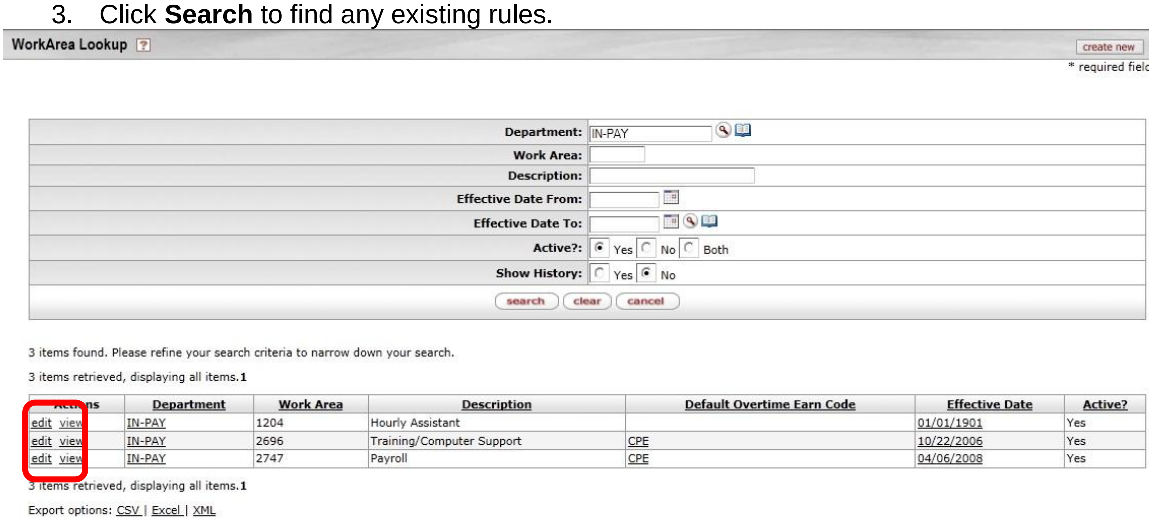
Use this document to view, create or edit the Work Areas and Tasks that will exist for your Department. You can also establish the Approver and Reviewer roles to review, edit and/or approve timesheets or leave calendars for those Work Areas.

To view the details for a Work Area (including Tasks and Roles):

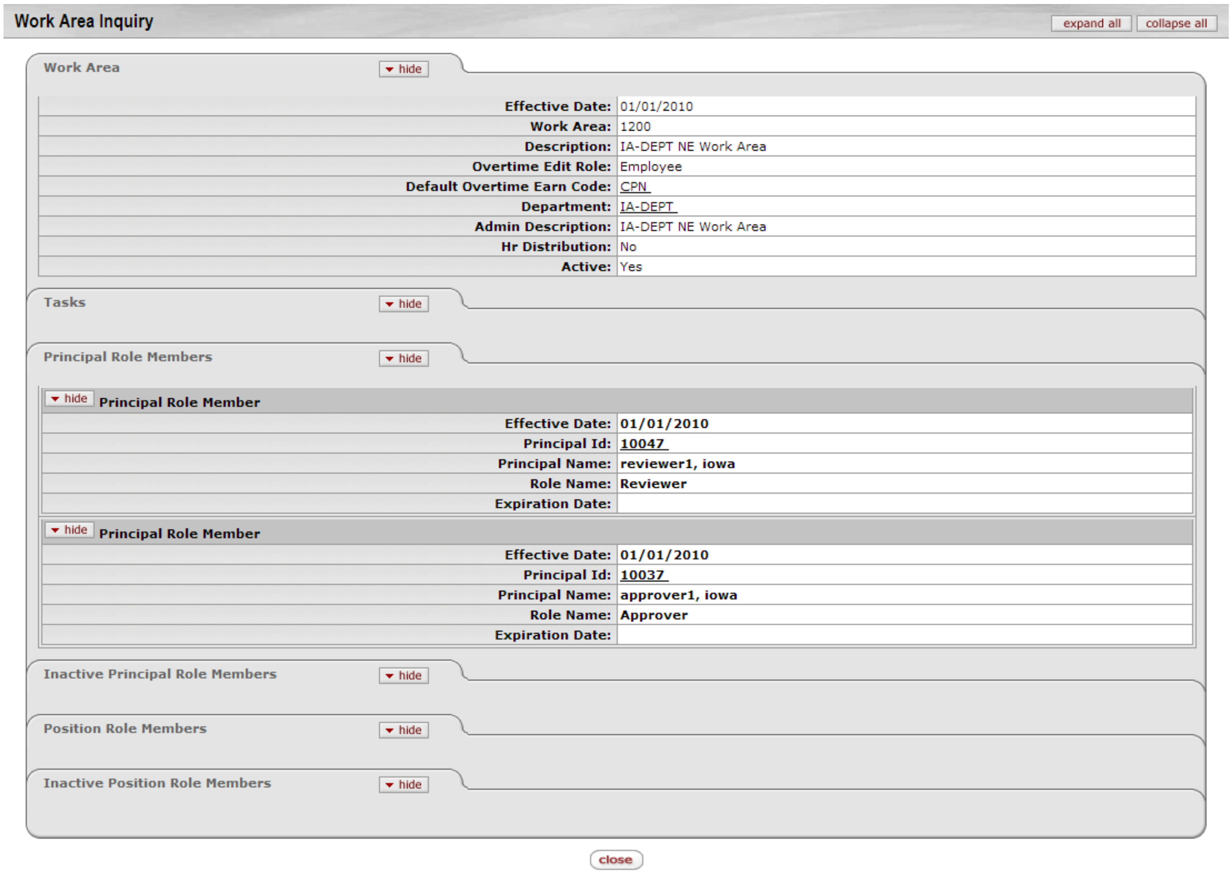
1. Log into KPME, go to the *Department Admin* tab, and click on <u>Work Area Maintenance</u> link.
2. On the Work Area Maintenance Lookup, enter your search criteria—<u>Department ID</u>, <u>Work Area</u>, <u>Description</u>, <u>Effective Date From</u> or <u>Effective Date To</u>.

HINT: Use the "%" symbol in any field (except date fields) as a wildcard value to indicate "ALL."

3. Click **Search** to find any existing rules.



4. In the search results, click **<u>view</u>** to view the details for that Work Area. That opens the **Work Area Inquiry** page where you can view details on the Work Area, Tasks, and (Approver, Reviewer, or Approver Delegate) Roles.



5. Clock **Close** to close the inquiry page.
6. Click **Cancel** to close the search results page and return to the *Department Admin* tab.

Creating a New Work Area or Task

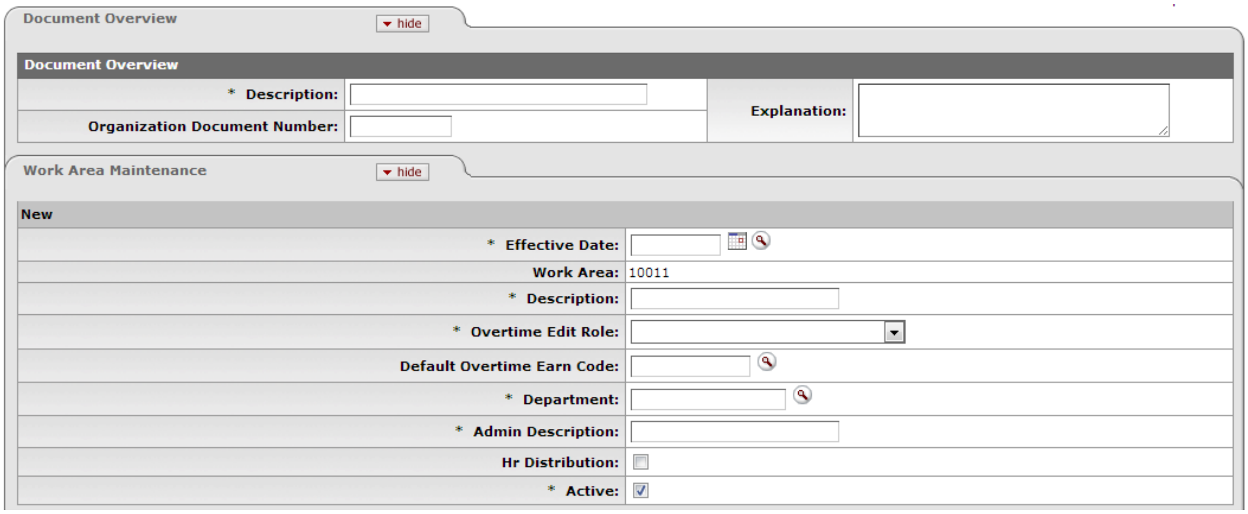
Work Area numbers are unique and assigned by the system. When creating a new work area the WA Description is important because that is what the employee sees when choosing an assignment to clock into.

The Approver role is assigned on the Work Area maintenance document. The Work Area must have at least one valid Approver to route for approval. You can also assign the "Reviewer" role, which allows someone in that role to view and edit timesheets/leave calendars, and the "Approver Delegate" role to set up a temporary delegate to approve timesheets or leave calendars.

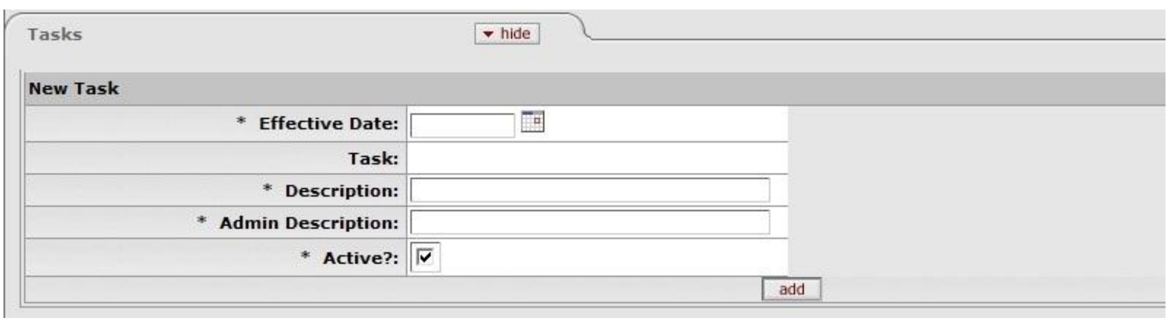
To add a new Work Area or Task:

1. Log into KPME, go to the *Department Admin* tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. Click **Create New** button to create a new rule (which opens a Work Area Maintenance document).

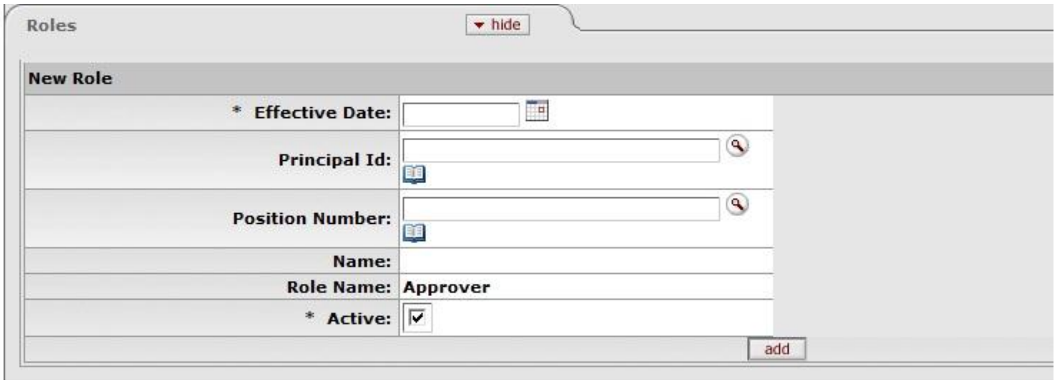
   Each **Work Area Maintenance** document is divided into four sub-sections: Document Overview, Work Area Maintenance, Tasks, and Roles. (***Note*****:** New Work Area numbers and Task numbers are automatically generated by the system.)



3. At top of document under ‘Document Overview,’ enter the document <u>Description</u>.
4. In the ‘Work Area Maintenance’ sub-section:
    a. Enter the <u>Effective Date</u> that you want this Work Area to be effective.
    b. Enter the Work Area <u>Description</u>. (This is what the employee sees when selecting this Assignment to clock or enter hours.)
    c. Select <u>Overtime Edit Role</u> (i.e., Employee, Approver, Approver Delegate, or Department Admin). (This determines which role can edit an employee’s timesheet to change overtime hours to comp time and vice versa.)
    d. Select your <u>Department</u> code (such as BL-RPAS or IN-SPEA)
    e. Enter the work area <u>Admin Description</u>. (This can be the same or different from the Description.)
    f. Leave “Active?” box checked as the default value.



5. (Optional step. Skip to step 6 if you are not adding Tasks.) To enter a **New Task** for the work area:
    a. In the Tasks sub-section, enter the <u>Effective Date</u> on which you wish this task to be effective.
    b. Enter the task <u>Description</u>. (This is what the employee sees when selecting this Assignment to clock or enter hours.)
    c. Enter the task <u>Admin Description</u>. (Can be the same or different from the 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 (step 5) for each Task you wish to add under this Work Area.



6. To add a **New Role** for the work area:
    a. In the Roles sub-section, enter the Effective Date on which you want this role to be effective.
    b. Enter the Principal ID of the person you are assigning to this role.
    c. (Optional step) You can enter the Position Number of this employee. This assigns the role to that position and automatically assigns it to any employee who is hired under that position number.
    d. In the Role Name field, select the role you are assigning (i.e., Approver, Approver Delegate, or Reviewer).
    e. Leave "Active" box checked as the default value for the role.
    f. Click **Add**.
    g. Repeat the "Role" steps (step 6) for each role you wish to add.

Note: You must have at least one person or position assigned to the "Approver" role.

7. After you've completed the work area document, click "**Submit**."
8. Click "**Close**" to close out of the document.

Editing a Work Area, Task or Role

Use the **Work Area Maintenance** document to edit an existing Work Area, the Tasks under that Work Area, or the Roles (Approver, Reviewer and Approver Delegate) you have assigned to review or approve timesheets for that Work Area.

To edit an existing Work Area, including the Tasks and Roles for that Work Area:

1. Log into KPME, go to the *Department Admin* tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click "**Search**."
3. In the search results, find the Work Area you want to edit, and in the "Actions" column of that search result click **edit**.
4. Edit the appropriate fields in the 'Work Area Maintenance' sub-section. Be sure to enter a document Description and to check the Effective Date. Leave the 'Active?' box checked as the default value, unless you want to "inactivate" this Work Area.
5. (If you don't use Tasks, skip this step.) You can add, edit or inactivate Tasks for this Work Area:
    - To add a **New Task**, go to the blank fields at the top of the 'Tasks' sub-section and enter values in all required fields, then click **Add**. (The system will then assign a new Task number.)
    - To edit 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 an existing Task, UNCHECK the 'Active?' box for that Task. (***Note:*** You will be unable to inactivate a Task that is currently being used in an active Assignment.)
6. In the 'Roles' sub-section, you can add new roles, edit existing roles, or inactivate a role:

- To add a **New Role**, as an “Approver, Approver Delegate or Reviewer,” go to the blank fields at the top of the ‘Roles’ sub-section and enter values in all required fields, then click **Add**. (You must assign a role to a person or a position.)
- To edit an existing Role, change the appropriate fields for that Role under the ‘**New**’ section in the right pane of the ‘Roles’ sub-section. You could change the Principal Id, or the Position Number of the person in that role, or you could change their role to “Approver, Approver Delegate or Reviewer.”
- To remove (inactivate) someone from an “Approver, Approver Delegate or Reviewer” role, you can UNCHECK the ‘Active’ box for that role. (The person removed will then show under the ‘Inactive Roles’ sub-section of the document.)

7. When finished editing the Work Area document, click “**Submit**.”
8. Click “**Close**” to close out of the document.

Inactivating a Work Area

You can inactivate a Work Area if there are no active Assignments under either the Tasks or the Work Area.

To inactivate an existing Work Area:

1. Log into KPME, go to the *Department Admin* tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click “**Search**.”
3. In the search results, find the Work Area you want to inactivate, and in the “Actions” column click **edit**.
4. Enter a document Description.
5. To inactivate the Work Area (which will inactivate all the Tasks and Roles under that Work Area):
    a. In the **New** section on the right, enter the Effective Date on which you want the Work Area to be inactive.
    b. Then, UNCHECK the ‘Active?’ box for that Work Area. ***Note:*** You will be unable to inactivate a Work Area or a Work Area with Tasks that is currently being used in an active Assignment.)
6. Click “**Submit**.”
7. Click “**Close**” to close out of the document.

Inactivating a Task

You can inactivate a Task if there are no active Assignments under that Task.

To inactive a Task for a Work Area:

1. Log into KPME, go to the *Department Admin* tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click “**Search**.”
3. In the search results, find the Work Area where the Task you want to inactivate belongs, and in the “Actions” column click **edit**.
4. Enter a document Description.
5. To inactivate a Task under that Work Area:
    a. In the **New** section on the right, enter the Effective Date on which you want the Task to be inactive.
    b. Then, UNCHECK the ‘Active?’ box belonging to that Task. (***Note:*** You will be unable to inactivate a Task that is currently being used in an active Assignment.)
6. Click “**Submit**.”
7. Click “**Close**” to close out of the document.

Inactivating an Approver, Approver Delegate or Reviewer Role

You can inactivate a Approver, Approver Delegate or Reviewer role for a Work Area. (***Note:*** For the Approver role, at least one person or position must be assigned to that role. You will be unable to inactivate this role if that person is the only Approver for this Work Area.)

To inactive a Role for a Work Area:

1. Log into KPME, go to the *Department Admin* tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click "**Search**."
3. In the search results, find the Work Area where the Role you want to inactivate belongs, and in the "Actions" column click **edit**.
4. Enter a document Description.
5. To inactivate an Approver, Approver Delegate or Reviewer role under that Work Area:
    a. In the **New** section on the right, enter the Effective Date when you want the Role to be inactive.
    b. Then, UNCHECK the 'Active' box for that Role. (***Note:*** You must have at least one person or position assigned to the "Approver" role.)
6. Click "**Submit**."

Inquiries

KPME provides 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 Punch documents submitted by or for an employee.

- Use the **Time Block** lookup screen to view the recorded Time Blocks present on a particular timesheet.
- Use the **Time Block History Detail** lookup screen to view the history of Time Blocks added, updated or deleted on a particular timesheet.
- Use the **Clock Log** 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**) Document Search screen to view any missed clock in's or clock outs for an employee.

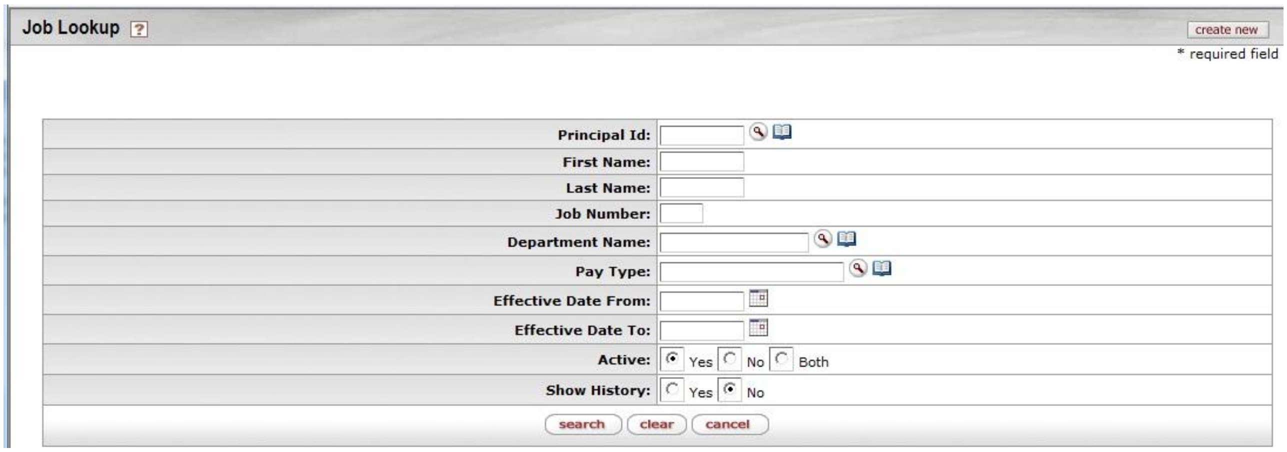
Adding Employees to KPME

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

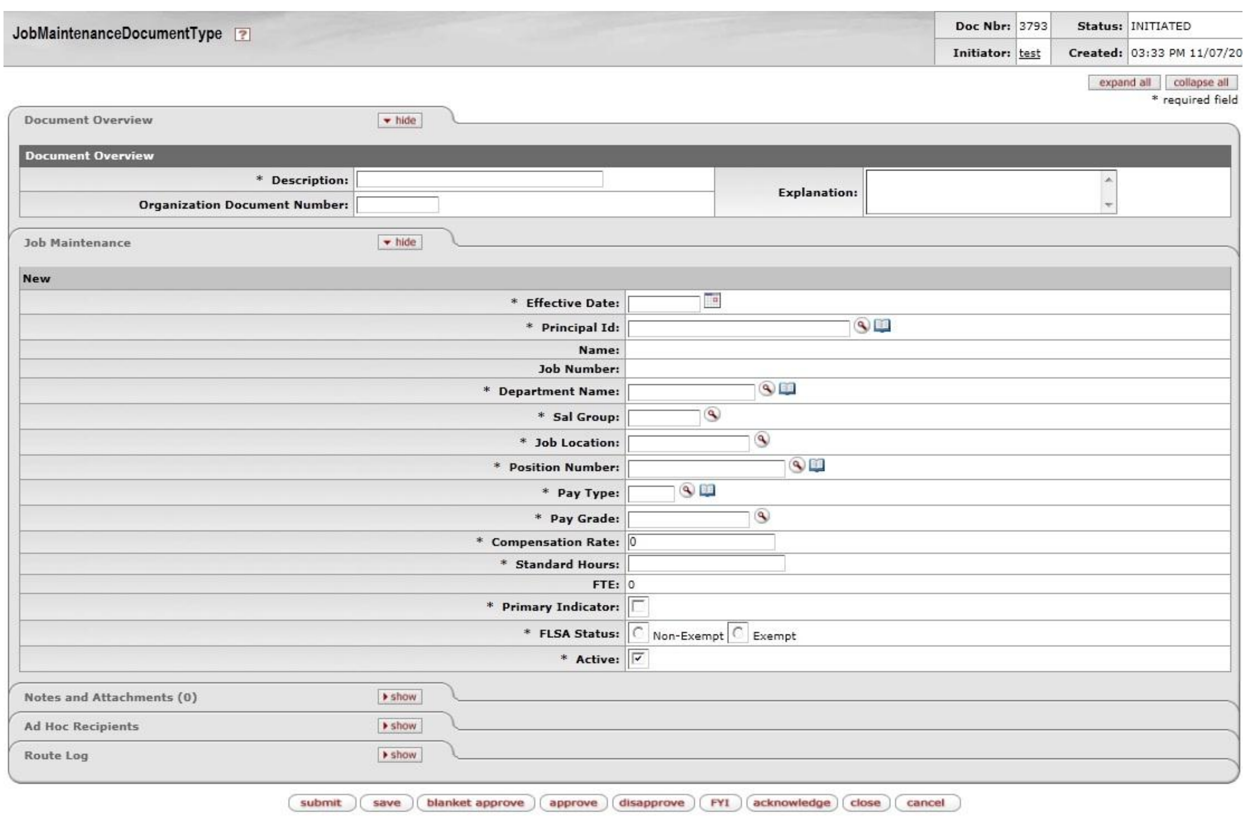
Hiring an Employee

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 or leave. 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 *Department Admin* tab, go to the HR/Payroll column, and click on the Job link to open the **Job Lookup** page.



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



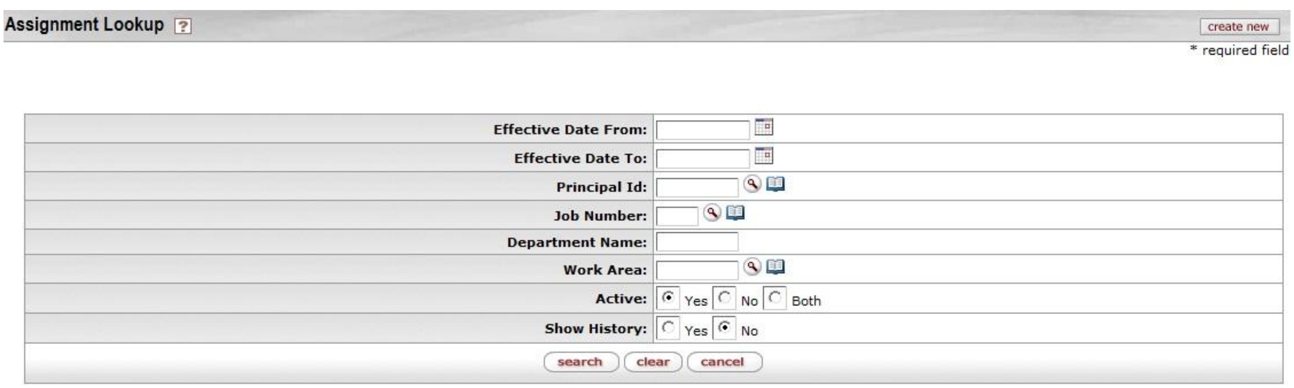
3. At top of document under ‘Document Overview,’ enter the document Description.
4. Enter the Effective Date on which you wish this hire to be effective.
5. Enter the Principal ID of the person you are hiring into this job.
6. Enter or select the Department Name.
7. Select the Salary Group from the lookup.
8. Enter or select 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. Select the correct FLSA Status for this employee; either Non-Exempt or Exempt.
16. Leave “Active” box checked as the default value.
17. After you’ve completed your Job hire document, click “**Submit**.”
18. Click “**Close**” to close out of document.

Adding an 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 an Assignment for an employee.

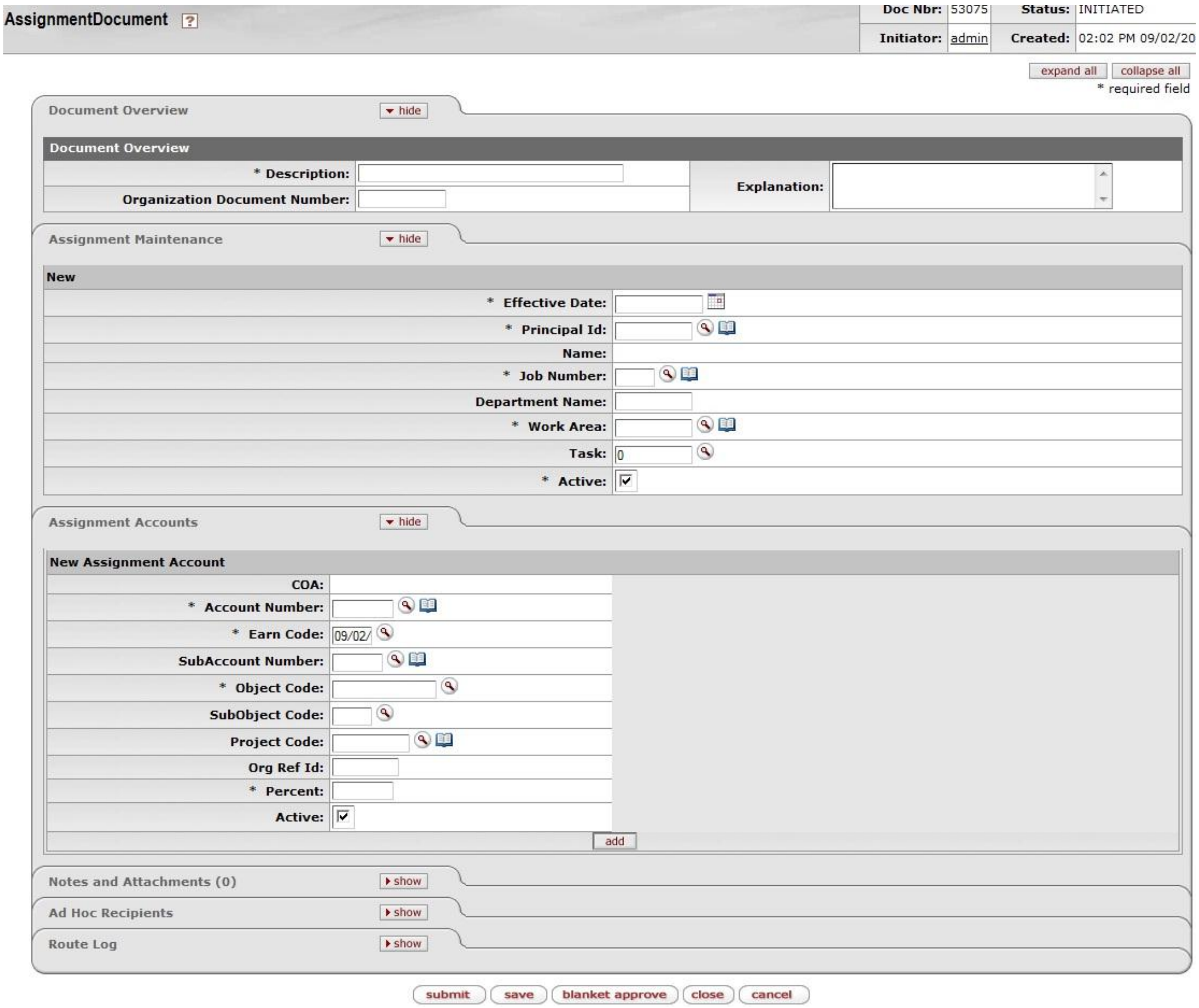
An employee can be given one or many assignments and the funding per assignment must total to 100%. Multiple assignments can be used when the employee reports to different Approvers, or when different accounts should be charged based on the work done. The employee records the hours against assignments.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

1. On the *Department Admin* tab, go to the HR/Payroll column, and 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 <u>Description</u>.
4. In the ‘Assignment Maintenance’ sub-section, enter the information to add the assignment:
    a. Enter the <u>Effective Date</u> that you wish this assignment to be effective.
    b. Enter the <u>Principal ID</u> of the employee you are adding to this assignment. (This fills-in the <u>Name</u>.)
    c. Select the <u>Job Number</u> from the lookup.
    d. Select the <u>Work Area</u> from the lookup.
    e. (Optional) If applicable, enter or select the <u>Task</u> from the lookup.
    f. 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 <u>Account Number</u> from the lookup.
    b. Select the <u>Earn Code</u> from the lookup. (You must define the ‘regular earn code’ for the job.)
    c. Select the <u>Object Code</u> from the lookup.
    d. Enter the <u>Percent</u>. (100 is maximum allowed value, but total of ALL Accounts added together must equal 100%)
    e. Leave “Active” box checked as the default value
    f. Click **Add** button to add the account funding.
    g. Repeat the ‘Assignment Account’ steps for each Account you need to add.
6. After you’ve completed all the required fields and section on the Assignment document, click “**Submit**.”
7. Click “**Close**” to close out of document.

Editing an Assignment

You can use the **Assignment** maintenance document to edit 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 *Department 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 or leave calendar.
    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 entering your changes to the Assignment document, click "**Submit**."
8. Click "**Close**" to close out of document.

Removing/Inactivating an Assignment

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

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

1. On the *Department 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.