Kuali HR 2.1.1 User Guide

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Chapter 1. Introduction

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 TIime?

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 is 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

Table 1.1. 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 Sinclare		**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.

Chapter 2. Logging In

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.

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.

Chapter 3. 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.

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 below.)

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 wo n' 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 (and inserts your timesheet Document ID and your Principal ID).

2. Select the Assignment where you missed clocking in or out. (If you only have one Assignment, the field will default to that value.)

   ### Note

   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).

3. 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.

4. 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)**

5. Click **Submit** to enter the missed punch on your timesheet.

6. 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 w ill 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 <u>Date Range</u> 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 <u>Earn Code</u> for the type of leave you are taking, such as SCK (sick), PTO, VAC (vacation), etc.

4. In the <u>Hours</u> 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.

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 '<u>Cust Serv Desk</u>').

2. This reopens the 'Add Time Blocks' entry box and you can modify the <u>Date Range</u>, the <u>Earn Code</u> (VAC, PTO, SCK, CPT, etc.) or the number of <u>Hours</u> 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 Calen dar 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.

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.

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 <u>Begin Time</u> and <u>End Time</u> for the selected Assignment:

- In Row 1 all you can enter is your actual <u>End Time</u> for that Assignment. (The <u>Begin Time</u> cannot be changed.)

- Go to the next row on the form and enter the same <u>Begin Time</u> as the <u>End Time</u> you entered in the row above. Then continue (in that same row) and enter the <u>End Time</u>, 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 <u>Begin Time</u> (and leave the <u>End Time</u> unchanged).

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

> ### Note
>
> 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.

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.

     b. In the 'Out' box, enter the time you stopped working

     ### Note

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

   - 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.

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.

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:

Chapter 4. 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 <u>Current Leave Calendar</u> link.

<u>Leave Ledger</u> 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 <u>Current Leave Period</u> at the top right side of the page takes returns to your leave calendars.

The <u>Leave Request</u> 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 <u>Current Leave Period</u> 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. <u>Adding, editing and deleting leave blocks to Leave Calendar works the same adding time to the Time Detail</u>.

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 "S ubmit leave request for approval" or the leave block can be added to the calendar as planned leave and later submitted for approval from the <u>Leave Request</u> page.

Viewing a Leave Summary

Below the calendar is a section showing the leave summary.

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 "p lanned " and the reason appears in the description on the Leave Request page.

Chapter 5. Other Employee Timekeeping Options

Changing Comp Hours to Overtime (and vice versa)

Notifying Approvers

Adding, Editing or Deleting a Timesheet Note

Viewing the Route Log

Viewing your Jobs, Asignments or Roles

Getting Help and Reporting Problems

Logging Out

Chapter 6. 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.

(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:

Timesheet Monitoring, Reviewing and Correcting

Finding Timesheets

Viewing Previous and Next Timesheets

Viewing Employee Work Status

Viewing Timesheet Warnings and Notes

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

Opening a Timsheet

Adding Time Blocks to a Timesheet

Editing Existing Time Blocks

Deleting Time Blocks

Adjusting Shift Differential Hours

Timesheet Approval and Routing

Employee Submission

Approver Approvals

Timesheets Not Ready to Approve

Approving Timesheets

Automated Approvals

Adding a Note to Employee Timesheets

Checking the Route Log

Leave Calendar Monitoring, Reviewing and Correcting

Leave Reqeuest Approval

Leave Calendar Approval and Routing

Chapter 7. More Options for Administrators

Using Inquiry Pages

Time Block Inquiry

Time Block History Inquiry

Clock Log Inquiry

Missed Punch Inquiry

Timekeeping Rules

Using the 'Show History' and 'Active?' Radio Buttons

Rule Look-up Example

Viewing Work Area Maintenance

Chapter 8. Department Administrator Options

Timekeeping Rules

How Rules Work

Rule Hierarchy

Effective Dates

Searching for Rules

Creating a New Rule

Editing a Rule

Inactivating a Rule

Clock Location Rule

Time Collection Rule

Department Lunch Deduction Rule

Leave Maintenance Functions

Administrative and HR/Payroll Functions

Work Area Maintenance

Creating a New Work Area or Task

Editing a Work Area, Task or Role

Inactivating a Work Area

Inactivating a Task

Inactivating an Approver, Approver Delegate or Reviewer Role

Inquiries

Chapter 9. Adding Employees to KPME

Hiring an Employee

Adding an Assignment

Editing an Assingment

Removing/Inactivating an Assignment