Kuali Time Department Administrator Guide

Using This Guide

This guide discusses all the key tasks that Department Administrators can perform for the Departments they will administer in the Kuali Time system. It reviews the various Maintenance pages available on the Admin tab, discusses establishing and maintaining Kuali Time business rules, and explains how to:

- Use the Time Keeping pages to:
    - lookup and view Clock Location rules
    - create, edit, or inactivate Clock Location rules
    - lookup and view Department Lunch Deduction rules
    - create, edit, or inactivate Department Lunch Deduction rules
    - lookup and view Shift Differential rules
    - lookup and view Time Collection rules
- Use the Administrative pages to:
    - look-up and view Work Areas
    - create, edit or inactivate Work Areas
    - look-up and view Department details and roles
    - look-up and view Earn Code details
- Use the Inquiries pages to look-up and view:
    - Time Blocks entered on a timesheet
    - Time Block History recorded for a timesheet
    - Clock Log transactions entered by or for an employee
    - Missed Punch documents submitted by or for an employee

Overview of the *Admin* Tab

On the *Admin* Tab, Department Administrators will have links to the Maintenance pages for Time Keeping Rules, Administrative functions and Inquiries (see illustration below).

You will use these pages to create and maintain Clock Location and Department Lunch Deduction rules, to view the Shift Differential and Time Collection rules impacting your department and work areas, to create and maintain Work Areas for your Department, and to search for specific employee time blocks, historical time blocks, clock transactions, or missed punch documents.

The Change Target Person field allows you to enter an employee's username (Principal Name) and open their timesheet.
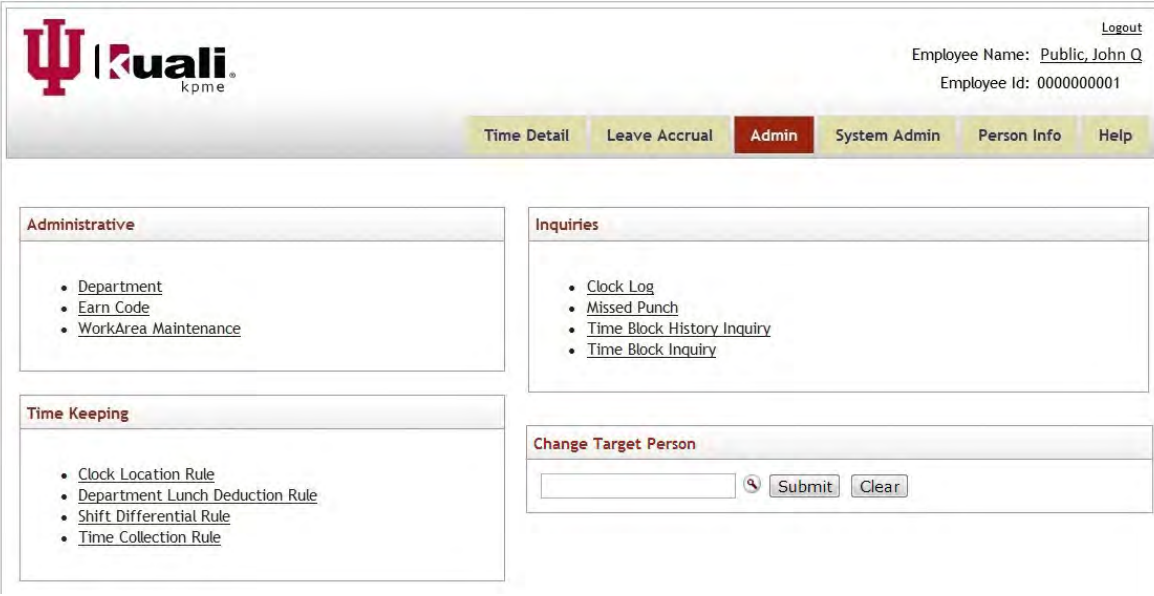
Timekeeping Rules

Department Administrators can establish and maintain business rules that determine how their department will interact with Kuali Time and what available options their employees will use. These business rules allow you, as a Department Administrator, 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 Kuali Time for use by your department. If used correctly, business rules can help make everyone's job easier and make Kuali Time reflect your departmental policies and procedures.

Each departmental rule is briefly described below:

o 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.

o Department Lunch Deduction Rule
   Determines if your Clock-Entry employees will use an automatic meal deduction, once they work a certain number of hours in a shift. It allows you to set a maximum number of minutes for an employee's meal and that value, usually 30 minutes or 60 minutes, is deducted from the employee's clocked hours.

o Shift Differential Rule
   This is view-only for Department Administrators. Determines how and when shift pay is earned based on University policies, and determines which shift pay earn codes to use.

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o Time Collection Rule
This is view-only for Department Administrators. Determines whether your employees will record work hours by clocking in and out (Clock-Entry) or by adding hours manually to their timesheet (Manual-Entry). These rules must follow University, Campus and/or Departmental policies, and will be set up by the System Administrators. You can request an exception to these policies, based on unusual circumstances for an employee.

How Rules Work

Most rules, such as the Departmental Lunch Deduction rule, or the Clock Location rule will not prevent your employees from using Kuali 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. Kuali 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 on 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

Kuali 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 Kuali 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 Kuali 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 BL-PARK or IN-SPEA

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.

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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

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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

On the Admin tab, under the 'Time Keeping' section, all Departmental Rule maintenance screens will take you to a Rule Lookup screen. On the Admin tab, go to the 'Time Keeping or Administrative' sections and click on the underlined link to open the Lookup screen for that rule.

Then, enter your search criteria, such as Department ID, Work Area, Principal ID, Job Number, etc., or simply click "Search" to retrieve a list of existing rules.

It's recommended that you enter only your Department ID in the search criteria if you wish to see all the rules for your particular department.

Creating a New Rule

On the Admin tab, go to the 'Time Keeping' section and click on the underlined link to open the Lookup screen for that rule. Then, click the Create New button at the top right of the page (see previous illustration).

This initiates a new Workflow document form where you enter values in the required fields to create the new rule (see document example below).

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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 (usually 6).

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, go to the Admin tab and then the 'Time Keeping' section, and select the rule you want by clicking on the underlined link. 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.

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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 will edit those fields to change the current values for this rule. (Fields requiring values are marked by an asterisk.)

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You must enter a Description at the top of each rule document, enter 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 Admin tab and then the 'Time Keeping' section, 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 workstation 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 Manual-Entry employees.

1. Log into Kuali Time, go to the 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 click Search (and 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. 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. Enter a "Document Overview" Description, (no matter whether you are creating, editing or inactivating a rule).

   - If all you want to do is inactivate this rule:

     a. In Effective Date field, enter the date when the rule will no longer apply.

     b. UNCHECK the "Active" box in the right pane under "New."

     c. Then, skip to step 11 and submit the document.

To create a new rule, you must enter values in the required fields marked by an asterisk (*). (Continue to Step 5.)

To edit an existing rule, the document shows the "Old" values for that rule in the left pane and you can edit any of the fields in the right pane. (Continue to Step 5.)

5. Enter a valid Department Id, or verify the existing value is correct.

6. Enter a valid Work Area for that Department, or verify the existing value is correct. (You can enter % as a wildcard value to indicate "ALL" work areas.)

7. Enter a valid Principal Id, or verify the existing value is correct. Note: 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 to indicate "ALL" employees for the specified Work Area(s).

8. Enter a valid Job Number, or verify the existing value is correct. Note: If you want this rule to affect only one job record for employee(s), then enter a specific Job Number. (You can enter % as a wildcard to indicate "ALL" job records for the specified employee(s).)

9. You can enter one or more than one IP Address as a clock location:

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a. Verify any IP Address entries already present in the document are 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 required, enter a new IP Address, and 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 that 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 exit from the document.

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).

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

1. Log into Kuali Time, go to the Admin tab, and click on Department Lunch Deduction 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, Work Area, Principal Id and/or employee Job Number. Then click Search (and 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. 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. Enter a "Document Overview" Description, (no matter whether you are creating, editing or inactivating a rule).

   - If all you want to do is inactivate this rule:

     a. In Effective Date field, enter the date when the rule will no longer apply.

     b. UNCHECK the "Active" checkbox in the right pane under "New."

     c. Then, skip to step 12, and submit the document.

   To create a new rule, you must enter values in all required fields marked by an asterisk (*). (Continue to Step 5.)

   To edit an existing rule, the document shows the "Old" values for that rule in the left pane and you can edit any of the fields in the right pane. (Continue to Step 5.)

5. Enter a valid Department Id, or verify the existing value is correct.
6. Enter a valid Work Area for that Department, or verify the existing value is correct. Note: (You can enter % as a wildcard to indicate ALL work areas.)

7. Enter a valid Principal Id, or verify the existing value is correct. Note: 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 to indicate "ALL" employees for the specified Work Area(s).)
8. Enter a valid Job Number, or verify the existing value is correct. Note: If you want this rule to affect only one job record for employee(s), then enter a specific Job Number. (You can enter % as a wildcard to indicate "ALL" job records for the specified employee(s).)
9. 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 exit from the document.

Time Collection Rule

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

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

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

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

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

Shift Differential Rule

Use this rule to view any shift pay rules that may impact your employees. Shift Differential rules will follow University polices, so they are set up by the System Administrators.

1. Log into Kuali Time, go to the Admin tab, and click on Shift Differential Rule link.
2. On the Shift Differential Rule Lookup, enter your search criteria—Location, Salary Group, Pay Grade, and/or Effective Date From and Effective Date To.

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

ShiftDifferentialRule Inquiry

Effective Date:	01/01/2013
Location:	IN
Sal. Group:	LE
Pay Grade:	05
Earn Code:	SRF
From Earn Group:	OTA
Begin Time (00:00 AM):	06:00 PM
End Time (00:00 AM):	06:00 AM
sunday:	Yes
monday:	Yes
tuesday:	Yes
wednesday:	Yes
thursday:	Yes
friday:	Yes
saturday:	Yes
Max. Gap Minutes:	0
UserPrincipal Id:	ktrinkle
Active:	Yes
Pay Calendar Group:	IU

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

Administrative Functions

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

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

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

Department Administrators can also view details about their Departments and about Earn Codes.

Creating a New Work Area

Use the Work Area maintenance document to view, create, edit or inactivate the Work Areas and Tasks that will exist for your Department.   Work Area and Task numbers are unique and assigned by the system.

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When creating a new work area the (Work Area) Description is important because that is what the employee sees when choosing an assignment to clock into.

In the Work Area maintenance document, you will select the 'Overtime Edit Role' to determine which role will be able to edit the Overtime Earn Code (and change it to Comp Time and vice versa).

You have the option to set the 'Default Overtime Edit Code' (as OVT)—but If you don't select a value in this field the timesheet will automatically compute Comp Time (CPE or NEC) when an employee works more than 40 hours in a week.

You have the option to add one or more Tasks to further sub-divide the work area for employees paid from multiple accounts or working on multiple projects.

The Time "Approver" (Supervisor) role is also assigned on the Work Area maintenance document. The Work Area must have at least one valid Approver to route a timesheet for approval.

You can also assign the "Reviewer" role, which allows a user in that role to view and edit timesheets, and the "Approver Delegate" role to set up a temporary delegate to approve timesheets whenever a Supervisor is not available to do so.

To add a new Work Area:

1. Log into Kuali Time, go to the 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. Required fields are marked by an asterisk (*).

   (Note: New Work Area numbers and Task numbers are automatically generated by the system.)

3. At top of document under 'Document Overview,' enter the document Description.
4. In the 'Work Area Maintenance' sub-section:
   a. Enter the Effective Date that you want this Work Area to be effective.

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b. Enter the Work Area Description. (This is what the employee sees when selecting this Assignment to clock or enter hours.)

c. Set the Overtime Preference for employees in that Work Area. This is split into two fields, the Default Overtime Earn Code, and the Overtime Edit Role. When you select an Overtime Edit Role it will allow that role and every role above it to edit. For example, if you select "Employee," then the Employee, Approver (Supervisor), and Payroll Processor can edit the overtime code.
   i. Select Overtime Edit Role (i.e., Employee, Approver, Approver Delegate, Payroll Processor, or Time Department Admin).
   ii. Enter Default Overtime Earn Code (OVT, CPE).

d. Select your Department code (such as BL-RPAS or IN-SPEA)

e. Enter the work area Admin Description. (This can be the same or different from the Description.)

f. Leave "Active?" box checked.

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 Effective Date on which you wish this task to be effective.
   b. Enter the task Description. (This is what the employee sees when selecting this Assignment to clock or enter hours.)
   c. Enter the task Admin Description. (Can be the same or different from the Description.)
   d. Leave "Active?" box checked.
   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:

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        a.   In the Roles sub-section, enter the Effective Date when you want this role to become active.

        b.   Enter the Principal ID of the user you are assigning to this role.

        c.   In the Role Name field, select the role you are assigning (i.e., Approver, Approver Delegate, or Reviewer).

        d.   (Optional step) If this role is temporary, you can enter a date when you want this role to expire in the Expiration Date field.

        e.   Leave "Active" box checked.

        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 assigned to the "Approver" role.

7. After you've completed the work area document, click "Submit."
8. Click "Close" to exit from the document.

Adding a Delegate for a Time Approver

Delegation allows the Department Administrator to temporarily assign approval to another person. The intent of delegation is to allow an alternate to approve timesheets when the main approver is unavailable to do so. It does NOT permanently delegate those responsibilities to that user. Delegations are created by the Department Administrator using the Work Area maintenance document in Kuali Time.

Delegations are set to a specific person and work area. This means when a Supervisor who approves timesheets for three Work Areas goes on vacation, there should be three different delegates established to cover all of that Time Approver's responsibilities. Delegates should be chosen from among other Time Approvers or Payroll Processors.

To add a person as an Approver Delegate, follow these steps:

1. Log into Kuali Time, go to the 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 you want to add an Approver Delegate, and in the "Actions" column click edit.
4. Enter a document Description.
5. Go to the 'Roles' sub-section, and enter the Effective Date on which you want this delegation to take effect.
6. To add a new delegate, type-in or select the Principal Id of that person.
7. Select Approver Delegate as the Role Name.
8. (Optional step) You can enter a date when you want this role to expire in the Expiration Date field.
9. Click Add to add the role to the document.
10. Leave "Active" box checked.
11. When finished with your entries, click "Submit."
12. Click "Close" to exit from 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 Kuali Time, go to the 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.)

    - 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 of the person in that role, or you could change their role to "Approver, Approver Delegate or Reviewer." If this is a temporary role, you can also edit or enter the date you want this role to expire, in the Expiration Date field.

    - To inactivate a user 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 exit from the document.

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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 Kuali Time, go to the 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. Go to the 'Work Area Maintenance' sub-section and 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.

Removing a Task

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

To remove a Task for a Work Area:

1. Log into Kuali Time, go to the 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 remove belongs, and in the "Actions" column click edit.
4. Enter a document Description.
5. To remove a specific Task under that Work Area, click "Delete."
6. Click "Submit."
7. Click "Close" to exit from the document.

Removing an Approver, Approver Delegate or Reviewer Role

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

To remove a Role for a Work Area:

1. Log into Kuali Time, go to the 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 remove belongs, and in the "Actions" column click edit.
4. Enter a document Description.
5. Go to the 'Roles' sub-section and find the role you want to remove, then click "Delete."
6. Click "Submit."
7. Click "Close" to exit from the document.

Viewing Work Area Details

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

1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link.
2. On the Work Area Maintenance Lookup, enter your search criteria—Department, Work Area, Description, Effective Date From or Effective Date To.

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

3. Click Search to find Work Area results.

4. In the search results, click view to view the details for that Work Area. That opens the Work Area Inquiry page where you can view details about the Work Area, including Tasks, and the users assigned as timesheet Approvers, Reviewers, or Approver Delegates.

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

Adding Departmental Roles (Department Admin, Department View Only, Payroll Processor and Payroll Processor Delegate)

Use the Department maintenance screen to add the following roles for your department: Department Administrator, Department View Only, Payroll Processor and Payroll Processor Delegate. This screen also allows you to view a list of users who hold these roles for any other department.

To add a new Role (Payroll Processor, Payroll Processor Delegate, Department Admin or Department View Only):

1. Log into Kuali Time, go to the *Admin* tab, and click on Department link.

2. On the Department Lookup, enter your Department and click "Search."
3. Click on the edit link to open the Department Document maintenance screen.
4. Enter a document Description.
5. To add a new Role:
    a. Go to the 'Roles' sub-section and enter the Effective Date when you want this role to be active.
    b. Enter or select the Principal Id of the user who will be assigned the role.
    c. Select the Role Name for this user: Payroll Processor, Payroll Processor Delegate, (Time) Department Admin, or (Time) Department View Only.
6. If this is temporary role (such as a Payroll Processor Delegate who is covering for someone on vacation or leave of absence), then enter a date when the role will expire into the Expiration Date field.
7. Leave "Active" box checked.
8. Click "Add" to add the role to the document.
9. Repeat steps 5 through 8 for each role you need to add.
10. When finished adding roles, click "Submit."
11. Click "Close" to exit from the document.

Inactivating Departmental Roles

Use the Department maintenance screen to remove the following roles for your department: Department Administrator, Department View Only, Payroll Processor and Payroll Processor Delegate.

Note: For the Payroll Processor role, at least one person must be assigned to that role.

To inactivate a Departmental role for a user:

1. Log into Kuali Time, go to the *Admin* tab, and click on Department link.
2. On the Department Lookup, enter your Department and click **Search**.
3. Click on the edit link to open the Department Document maintenance screen.
4. Enter a document Description.
5. Go to the 'Roles' sub-section, find the role you want to inactivate and UNCHECK the 'Active?' box. Repeat this step for each role you need to remove.
6. When finished with your edits, click "Submit."
7. Click "Close" to exit the document.

Viewing Department Details

To view the details for a Department which includes a list of users who are assigned Roles:

1. Log into Kuali Time, go to the Admin tab, and click on Department link.
2. On the Department Lookup, enter your search criteria—Department, Location, and/or Description.

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

3. Click Search to find your Department.

4. In the search results, click view to view the details for that Department. That opens the Department Inquiry page where you can view details about the Department, and the users who have administrative or view-only Roles in that Department.

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

Viewing Earn Code Details

Use the Earn Code lookup screen to search for and view details about specific earn codes, such as the description, accrual category, whether it is an overtime earn code, has an inflate factor, counts as regular pay, or how it is recorded on the timesheet (Time, Hours, or Amount).

To view the details for an Earn Code:

1. Log into Kuali Time, go to the Admin tab, and click on Earn Code link.
2. On the Earn Code Lookup, enter your search criteria—Earn Code, Description, Leave Plan, Accrual Category, Overtime Earn Code (Y or N), and/or Effective Date From and Effective Date To.

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

3. Click "Search" to find your Earn Code.

4. In the search results, click view to view the details for that Earn Code. That opens the Department Inquiry page where you can view details about the Department, and the users who have administrative or view-only Roles in that Department.

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

Inquires

On the Admin tab, Kuali Time provides four Inquiry screens that are useful tools for looking at the Time Blocks recorded on a timesheet, the historical Time Block entries on a timesheet, the clock transactions logged for an employee, or the Missed 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 Punch documents submitted to record a missed clock in or clock out action by an employee.

Time Block Inquiry

Department Administrators who have employees in Kuali 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 Kuali Time, go to the Admin tab, and in the Inquiries column, click the "Time Block Inquiry" link.
2. Enter the Document ID of the timesheet you want to view the time blocks entered on that particular timesheet.
3. You can also search by other criteria including the Principal Id (University Id of employee), User Principal Id (University ID of person who entered the Time Block), Document Status and Date From and Date To (to find Time Blocks entered on a specific date or range of dates).
4. Click "Search."

The results of this search are displayed in a tabular format and include: Document ID, Principal ID, Job Number, User Principal ID, Earn Code, Work Area, Task, Hours or Amount, Overtime Preference, Lunch Deleted, and Begin Time and End Time.

9 items retrieved, displaying all items.

Document Id	Principal Id	Job Number	User Principal Id	Earn Code	Work Area	Task	Hours	Amount	Lunch Deleted	Begin Time	End Time
10000	0000000007	0	0000000007	RBP	0100	0	5		No	07/01/2013 08:30 AM	07/01/2013 01:30 PM
10000	0000000007	0	0000000007	RBP	0100	0	5		No	07/05/2013 08:30 AM	07/05/2013 01:30 PM
10000	0000000007	0	0000000007	RBP	0100	0	4.25		No	07/03/2013 01:30 PM	07/03/2013 05:45 PM
10000	0000000007	0	0000000007	RBP	0100	0	3		No	07/01/2013 02:00 PM	07/01/2013 05:00 PM
10000	0000000007	0	0000000007	HOL	0100	0	8		No	07/04/2013 12:00 PM	07/04/2013 12:00 PM
10000	0000000007	0	0000000007	RBP	0100	0	4.5		No	07/03/2013 08:30 AM	07/03/2013 01:00 PM
10000	0000000007	0	0000000007	RBP	0100	0	3.42		No	07/02/2013 02:00 PM	07/02/2013 05:25 PM

Export options: CSV | Excel | XML

5. (Optional step) You can click on any of the (underlined) Document ID numbers 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 (if applicable), along with a confirmation indicating whether or not the entry was logged by the clock.

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

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6. Click "Cancel" to close the search results page and return to the Admin tab.

Time Block History Inquiry

Department Administrators who have employees in Kuali Time can go to the Admin tab and use the Time Block History Inquiry to view the history of time blocks entered on a particular timesheet or for a specific employee. The history that is recorded will show when time blocks were added, updated, or deleted from that employee's timesheet.

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

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

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the "Time Block History Inquiry" link.

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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 (University Id of employee), User Principal Id (person who added/removed the time block), Document Status, Date From and Date To fields, and Modified Time From and Modified Time 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, Time Block Id, Work Area, Task, Job Number, Earn Code, Begin Time and End Time, and Hours or Amount, along with a confirmation indicating whether the action was recorded in the clock log, what Action History was performed on that Time Block (add, update, or delete), and when it was modified.

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

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
3113	10039	975575	10005	0	0	RGN	09/17/2012 04:33 PM	09/17/2012 04:36 PM	0.05	0.00	Yes	Delete	10039	09/17/2012 04:36 PM
3113	10039	975575	10005	0	0	RGN	09/19/2012 03:48 PM	09/20/2012 12:00 AM	7.70	0.00	Yes	Add	10039	09/17/2012 04:36 PM
3113	10039	975575	10005	0	0	SCK	09/18/2012 11:59 PM	09/18/2012 11:59 PM	8.00		No	Add	10039	09/17/2012 04:53 PM

4. (Optional step) You can click on the (underlined) Document Id or Time Block Id links in the search results 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.

TimeBlockHistory Inquiry   expand all   collapse all

TimeBlockHistory   ▼ hide

Time Block Id:	14334
Document Id:	405376
User Principal Id:	0000000007
Job Number:	0
Work Area:	0100
Earn Code:	RGH
Begin Time:	02/09/2012 04:25 PM
End Time:	02/09/2012 11:25 PM
Hours:	7
Amount:	
Clock Log Created:	Yes
Action History:	Delete
Principal Id:	9900006421
Modified Time:	02/16/2012 01:17 PM

close

5. (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 (student, staff), along with their basic job information.
6. (Optional step) If you open any Inquiry page, click "Close" to exit from it.
7. Click "Cancel" to close the search results page and return to the Admin tab.

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Clock Log Inquiry

Department Administrators who have employees in Kuali Time can use the Clock Log to view the clock transactions logged on a particular timesheet.

To perform a Clock Log Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the "Clock Log" link.
2. Enter the Document ID of the timesheet or the Principal ID of the 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: Principal ID, Work Area, Task, IP Address, Clock Action, Job Number, User Principal ID, Clock Timestamp, Clock Timestamp Timezone, and Missed Punch Document ID.

4 items retrieved, displaying 1 to 4

Document Id	Principal Id	Work Area	Task	IP Address	GPS Longitude	GPS Latitude	Clock Action	Job Number	UserPrincipal Id	Clock Timestamp (MM/DD/YYYY HH:MM AM	Clock Timestamp Timezone	Timestamp	Missed Punch Document Id
10000	1000000009	7891	0	129.79.25.18			CI	0	1000000009	09/07/2010 12:00 AM	America/Indianapolis	09/17/2010 12:34 AM	0109700
10000	0000000081	7891	0	10.56.9.153			CO	0	0000000081	09/07/2010 01:00 AM	America/Indianapolis	09/17/2010 01:00 AM	
10000	0000000081	7891	0	10.56.9.153			CI	0	0000000081	09/20/2010 03:00 PM	America/Indianapolis	09/20/2010 03:01 PM	
10000	0000000081	7891	0	10.56.9.153			CO	0	0000000081	09/21/2010 12:00 AM	America/Indianapolis	09/20/2010 11:57 PM	

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 Admin tab.

Missed Punch Inquiry

Department Administrators with Clock-Entry employees can use the Missed Punch inquiry to find Missed Punch documents that were submitted by or for employees to report missed clock punches.

To perform a Missed Punch Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the "Missed Punch" link.

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2. This opens the Document Search screen with the Document Type pre-loaded as 'MissedPunchDocument.'
   a. Enter the Document ID of the Missed Punch document that was submitted by either you or the employee.
   b. If you don't have the Document ID then you can search for any Missed Punch documents by Initiator (Username of the person who submitted the document, usually the employee), Department, 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.

Document Id	Document Type	Title	Status	Initiator	Date Created	Document Description	Organization Document Number	Department	Work Area	Timesheet Document Id	Task	Missed Clock Action	Route Log
00808233	MissedPunchDocument	MissedPunchDocument - Missed Punch: 0000000006	ENROUTE	Public, John Q	10/02/2013 04:16 PM	Missed Punch: 0000000006		BL-MUS	2005	00808232	0	CI	🔍

Export options: CSV | spreadsheet | XML

The information displayed in the search results includes the Document ID, Document Type, Title, Status, Initiator, Date Created, Department, and Route Log.

4. Click on the underlined Document ID number 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.

   a. If you are the employee's Supervisor and still need to approve the Missed Punch document, you can edit it to enter the correct Clock Action, Action Date and/or Action Time.
   b. If the date and time of the missed punch is correct, then click Approve to approve the document.

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5. Click "Close" 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 Admin tab.

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