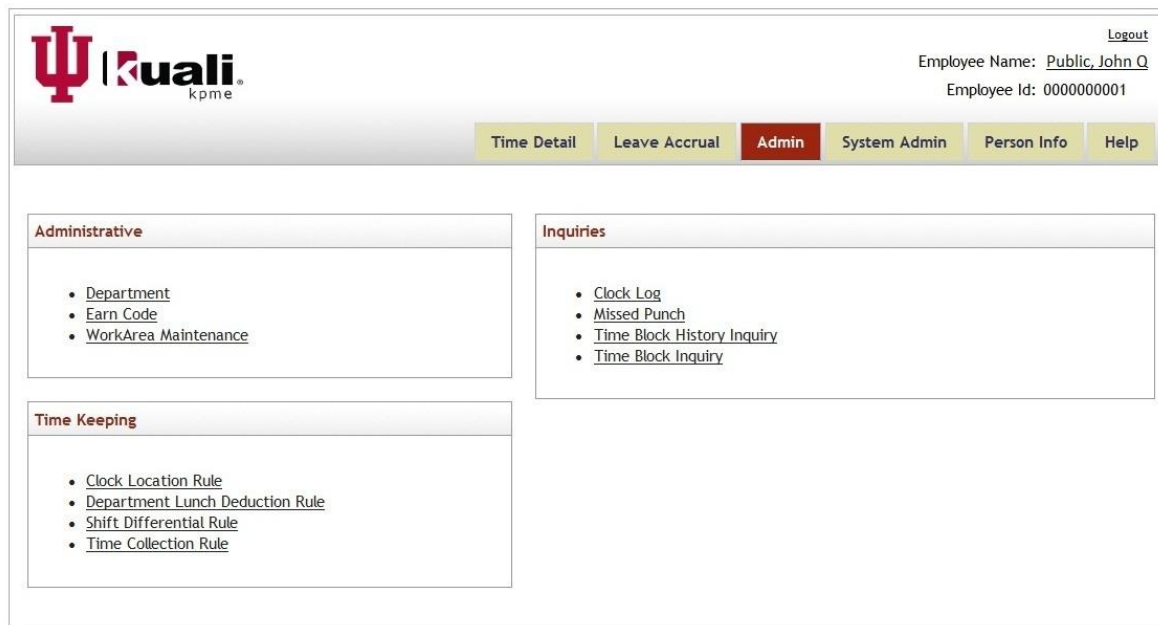


Kuali Time Rules Guide

Administration Tab

As a Department Administrator, when you open the Admin tab you will see 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 your 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.



Work Area Maintenance

This maintenance screen allows Department Administrators to view, create, and edit Work Areas, including setting overtime preferences, and assigning users as timesheet Approvers, Approver Delegates and Reviewers. Also, provides the option to add or edit Tasks for the Work Area.

Department Administrators use the Work Area Lookup screen to search for work areas, the Work Area Inquiry screen to view details for that Work Area, and the Work Area Document to create new or edit existing Work Areas (and Tasks). You can:

- Lookup specific Work Areas, by Department, Work Area, Description and Effective Date.
- View work area details, such as overtime preference, tasks, and (approver) roles.
- Create new or edit existing Work Areas and associated Tasks.
- Add and delete timesheet Approvers (Supervisors), temporary Approvers, and Reviewers.
- Set the Overtime Preference for employees in a 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.

Creating a New Work Area

1. In Quali Time, go to the Admin tab and click on the Work Area Maintenance link to open the ‘Work Area Lookup.’

WorkArea Lookup create new
* required field

Department:	<input type="text"/>
Work Area:	<input type="text"/>
Description:	<input type="text"/>
Effective Date From:	<input type="text"/>
Effective Date To:	<input type="text"/>
Active?:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Show History:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

2. Click Create New button. This opens the ‘Work Area Document’ showing the new work area number.

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.)

Document Overview hide

Document Overview

* Description: Explanation:

Organization Document Number:

Work Area Maintenance hide

New

* Effective Date:

WorkArea: 1074

* Description:

* Overtime Edit Role:

Default Overtime Earn Code:

* Department:

Admin Description:

* Active?:

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 you want this Work Area to become active.
 - 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:

- i. Select the Overtime Edit Role.
 - ii. Enter the Default Overtime Earn Code (OVT, CPE).
 - d. Enter or select your Department code.
 - e. (Optional) Enter an Admin Description for the Work Area. . (This can be the same or different from the Description.)
 - f. Leave “Active?” box checked as the default value.
5. (Optional step. Skip to step 6 if you are not adding Tasks.) To enter a New Task for the work area:

The screenshot shows a web form titled 'Tasks' with a 'hide' button. Below the title is a section for 'New Task'. The form contains the following fields:

- * Effective Date: [text input with calendar icon]
- Task: [text input]
- * Description: [text input]
- Admin Description: [text input]
- * Active?:

 An 'add' button is located at the bottom right of the form.

- a. In the Tasks sub-section, enter the Effective Date you want the task to become active.
 - b. Enter a Description for the Task. (This is what the employee sees when selecting this Assignment to clock or enter hours.)
 - c. (Optional) Enter the task Admin Description. (Can be the same or different from the Description.)
 - d. Leave “Active?” box checked as the default value.
 - e. Click Add. (The system will then assign a new Task number.)
 - f. Repeat this step (step 5) for each Task you need to add for this Work Area.
6. Enter the Roles you need to add. You must add at least one Approver.

The screenshot shows a web form titled 'Roles' with a 'hide' button. Below the title is a section for 'New Role'. The form contains the following fields:

- * Effective Date: 07/23/2013 [calendar icon]
- Principal Id: [text input with search and help icons]
- Position Number: [text input with search and help icons]
- Name: [text input]
- * Role Name: Approver [dropdown menu]
- Expiration Date: [text input with calendar icon]
- * Active:

 An 'add' button is located at the bottom right of the form.

- a. In the Roles sub-section, enter the Effective Date you want the role to become active.
- b. Enter or select the Principal ID of the user you are adding to this role.
- c. Select the Role Name (Approver, Approver Delegate or Reviewer) of the role you are adding.
- d. (Optional) You can enter a date when you want this role to expire in the Expiration Date field.
- e. Leave “Active” box checked as the default for the role.
- f. Click Add.

- g. Repeat this step (step 6) for each Role you need to add.
7. When finished setting up the Work Area, Tasks and Roles, click Submit button.
8. Click Close to close out of the document.

Editing or Inactivating a Work Area - Including Roles and Tasks

1. In Quali 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. This opens the Work Area Document for that work area.
4. Edit the appropriate fields in the 'Document Overview' and 'Work Area Maintenance' sub-sections. Be sure to enter a document Description and verify the Effective Date shows the date you want this change to take effect.
 - a. If you inactivating this Work Area, UNCHECK the 'Active?' checkbox and skip to Step 7.
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 remove (inactivate) someone from an "Approver, Approver Delegate or Reviewer" role, you can UNCHECK the 'Active' box for that role. (The person removed will then show under the 'Inactive Roles' sub-section of the document.)
7. When finished editing the Work Area document, click Submit.
8. Click Close to close out of the document.

Time Collection Rule

This rule determines whether employees will record their work hours by clocking in and out (clock-entry) or by manually adding work hours (manual-entry) to their timesheet.

Department Administrators use the Time Collection Lookup to search for clock entry rules that impact their department, and the Time Collection Rule Inquiry screen to view details about a specific rule.

These rules are managed centrally to ensure that policy is being followed and all exceptions are documented. The university-wide policy is that all part-time (hourly) employees clock, so the system default is clock entry/synchronous. The campus policy at Northwest, East, South Bend and most Indianapolis RCs is that the biweekly (BWP and BW1's) clock. The rules for these campuses make these pay types as Clock User = Yes. Any departments/work areas with an exception to this policy should have a rule in place. For exceptions at these locations, the rule shows as Clock User = No.

For Bloomington, Southeast and some Indianapolis RCs the biweekly staff are manually entering their time. The rules for BL and SE campuses make these pay types as Clock User = No. Exceptions at these locations, where biweekly staff clock, shows an entry with Clock User = Yes.

If you do not see an exception in the inquiry for your department you will need to [request an exception](#). Exceptions to policy are only considered when there is a consistent inability to access the internet to clock.

You can lookup time collection rules, by Location, Department, Work Area, and Pay Type.

Looking Up and Viewing Time Collection Rules

1. In Quali 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.

Time Collection Rule Lookup ? create new
* required field

Location:	<input type="text"/>
Department:	<input type="text"/>
Work Area:	<input type="text"/>
Pay Type:	<input type="text"/>
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Show History:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

One item retrieved.1

Actions	Location	Department	Work Area	Pay Type	Effective Date	Clock User	Active
<input type="button" value="view"/>	%	%		BW1	01/01/2013	No	Yes

Export options: CSV | Excel | XML

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

Time Collection Rule Inquiry expand all collapse all

Time Collection Rule hide

Location:	
Effective Date:	01/01/2013
Department:	%
Work Area:	%
Pay Type:	BW1
Clock User:	No
Hr Distribution:	No
User Principal Id:	ldingram
Active:	Yes

close

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

Clock Location Rule

The clock location rule specifies a particular computer (or set of computers) that a group of employees should be clocking in and out from. These rules are identified by that computer’s IP address.

Department Administrators use the Clock Location Rule Lookup to search clock location rules, the Clock Location Inquiry to view the details for that rule, and the Clock Location Rule Document to create new or edit existing Clock Location rules.

When entering rules you should always setup the rule for the majority and then put in exceptions for those not subject to the rule. For example, if you have a work area where everyone, except one person, should be using a kiosk to clock in/out, you should set up the rule for the work area first, and then add an additional rule as an exception for that one employee by using a “wildcard” for the IP address.

The Clock Location Rule lookup allows you to:

- Lookup specific clock location rules, by Department, Work Area, Principal Id, Job Number and Effective Dates.
- View clock location rule details, such as Work Area, Job Numbers, and IP addresses.
- Create new or edit existing Clock Location rules.
- Add and delete IP addresses in a rule at any time.
- Add multiple IP address and wildcard part of an IP address so you can set rules for subnets.


Creating a New Clock Location Rule or Editing an Existing Rule

1. In Quali Time, go to the Admin tab, and click on Clock Location Rule link.

Clock Location Rule Lookup ? create new

Department Id:	<input type="text"/>
Work Area:	<input type="text"/>
Principal Id:	<input type="text"/>
Job Number:	<input type="text"/>
Effective Date From:	<input type="text"/>
Effective Date To:	<input type="text"/>
Active:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Show History:	<input type="radio"/> Yes <input type="radio"/> No

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:
 - 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.
 Note: You can use the “%” symbol as a wildcard to indicate multiple computers under the same subnet. For example, if employees will be clocking in from multiple computers in the same room, they are likely on the same subnet, so you could enter a “%” symbol in the last octet of the IP address (e.g. 129.72.25.%).
 - 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.

ClockLocationRuleDocument ?	Doc Nbr: 10117957	Status: INITIATED
	Initiator: ktrinkle	Created: 12:11 PM 03/05/21

[expand all](#) [collapse all](#)
* required field

Document Overview ▼ hide

Document Overview

* **Description:** updating CL rule for WA 1111

Organization Document Number:

Explanation:

Clock Location Rule Maintenance ▼ hide

New

* **Effective Date:** 03/05/2012

* **Department Id:** UA-FMOP

* **Work Area:** 1111

* **Principal Id:** %

* **Job Number:** 0

* **Active:**

IP Addresses ▼ hide

New IP Address

* **IP Address:**

▼ hide **IP Address**

IP Address: 33.33.33.33

▼ hide **IP Address**

IP Address: 129.49.12.12

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

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

Department Lunch/Meal Deduction Rule

This rule allows Department Administrators to specify an automatic deduction for lunch or meal hours. If a lunch rule is not setup, employees clock in and out for lunch.

You can set a maximum number of minutes for an employee’s lunch. No lunch rule is required. The clock use lunch rule simply shows the time deducted as a lunch/meal on the employee’s timesheet and denotes it as a lunch for exception reporting. The lunch rule without clock use will automatically deduct the specified time from a shift of 6+ hours.

When entering rules you should always setup the rule for the majority and then put in exceptions for those not subject to the rule. For example, if you have a work area where everyone, except one person, should have a meal deducted, you should set up the rule for the work area first and then add an additional rule as an exception for that one employee by setting the deduction minutes as 0.

Creating a New Lunch Deduction Rule or Editing an Existing Rule

1. Log into Kualu 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.”

Department Lunch Rule Lookup ? create new

Department:	IN-PAY
Work Area:	
Principal Id:	
Job Number:	
Effective Date From:	
Effective Date To:	
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Show History:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

One item retrieved.1

Actions	Department	Work Area	Principal Id	Job Number	Lunch Deduction Minutes	Shift Hours	Effective Date	Time Stamp	Active
edit view	IN-PAY	%	0000000007	%	5	0.1	01/01/2012	02/28/2012 03:29 PM	Yes

Export options: [CSV](#) | [Excel](#) | [XML](#)

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 close out of document.