Kuali Time Quick Start Guide: Adding Approver and Payroll Processor Delegates

- Allows Department Administrator to temporarily assign approval to another person.
- Delegate can approve timesheets when the main approver or payroll processor is unavailable.
- Does NOT permanently delegate those responsibilities to that user.
- Can enter a date when the delegation expires.

Login to Kuali Time

- 1. Login to One.IU <u>https://one.iu.edu</u>.
- 2. Search for Kuali Time in the search bar at the top of the page (red box below).
- 3. Click the Kuali Time task tile (green box below) to open Kuali Time in a new tab or window.

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Add Approver Delegate

An Approver Delegate can approve timesheets on behalf of the main approver. This role must be assigned by Work Area.

1. On **Admin** tab, look under the **Administrative** menu, and click on **WorkArea Maintenance** link (red box below).

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Kuali Time Quick Start Guide: Delegations

- 2. In the Work Area Lookup, enter your search criteria (e.g., Department ID and/or Work Area) and click **search** (blue box below).
- 3. In the results, find the Work Area you want and in the 'Actions' column click **edit** (red box below).
- 4. Work Area Document opens, and at top of page, enter a document description in the 'Description' field (green box below):

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- 5. Go to the 'Roles' sub-section (blue box above): Enter the 'Effective Date' on which you want this delegation to take effect (defaults to the current date).
 - Enter or select the 'Principal Id' (employee Id) of the new delegate.
 - Select *Approver Delegate* as the Role Name.
 - (Optional step) You can enter the date when this role will expire in the 'Expiration Date' field.
 - Click **add** button to add the new delegate to the document (new delegate role appears at bottom of page).
- 6. Repeat step 5 above for each approver delegate you need to add.
- 7. When you are finished adding delegates, click **submit** at the bottom of the page.
- 8. After submitting, the document will have 'Enroute' status. To exit, click **close** at the bottom of the page.

Add Payroll Processor Delegate

A Payroll Processor Delegate can approve timesheets on behalf of the main payroll processor. This role must be assigned by Department.

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1. On Admin tab, look under the Administrative menu, and click on Department link.

- 2. On the Department Lookup, enter your Department and click search (green box above).
- 3. In the results, under 'Actions' column, click **edit** (blue box above).
- 4. Department Document opens. At top of page, enter a document 'Description' (black box below).

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- 5. Go to the 'Roles' sub-section (red box above) Enter the 'Effective Date' on which you want this delegation to take effect (defaults to the current date).
 - Enter the 'Principal Id' (employee Id) of the new delegate.
 - Select *Payroll Processor Delegate* as the 'Role Name'.
 - o (Optional step) You can enter the date when this role will expire in the 'Expiration Date' field.
 - Click **add** button to add the new delegate to the document (new delegate role appears at bottom of page).
- 6. Repeat step 5 for each payroll processor delegate you need to add.
- 7. When you are finished adding payroll processor delegates, click **submit** at the bottom of the page.
- 8. After submitting, the document will have 'Enroute' status. To exit, click **close** at the bottom of the page.

Get Help and Report Problems

- 1. Click the Help tab on your timesheet to view video demonstrations and online documentation.
- 2. Contact your supervisor if you have questions, can't log in, or need corrections to your timesheet.