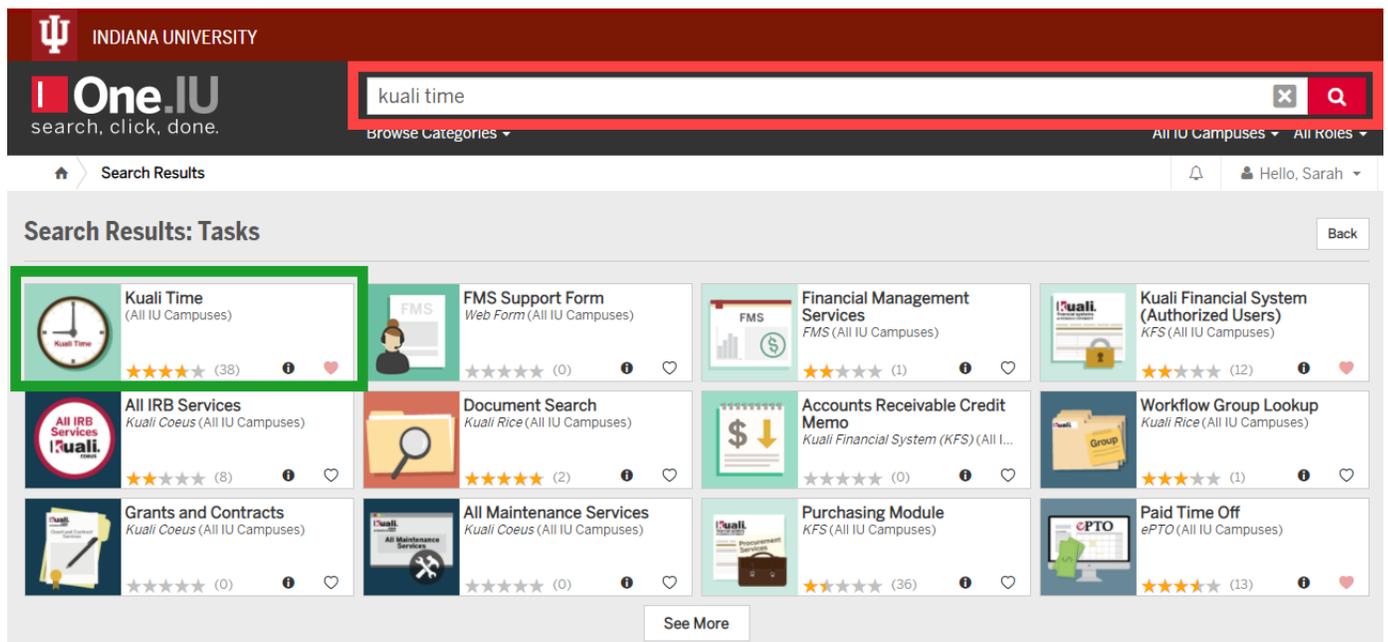


## Kuali Time Quick Start Guide: Adding Approver and Payroll Processor Delegates

- 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

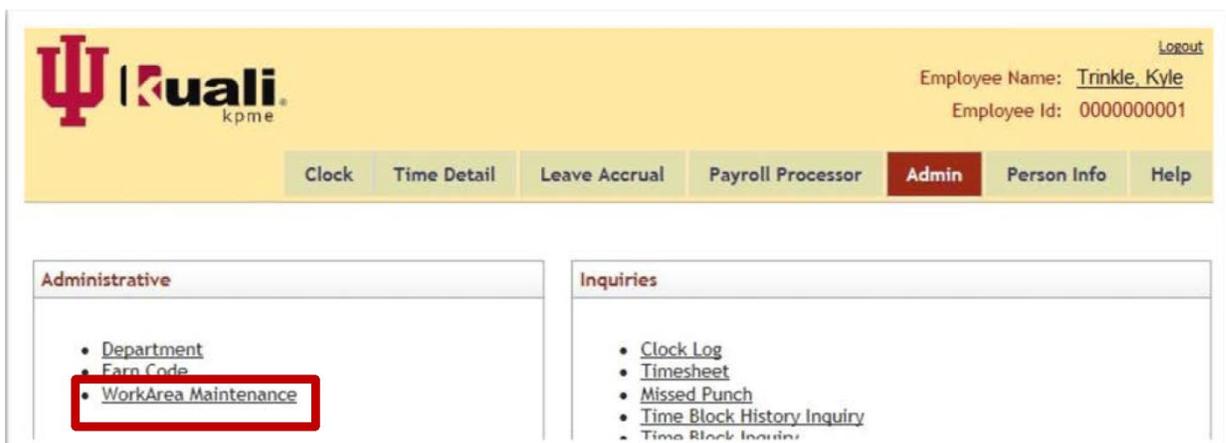
1. Login to One.IU <https://one.iu.edu>.
2. Search for Kuali Time in the search bar at the top of the page (red box below).
3. Click the Kuali Time task tile (green box below) to open Kuali Time in a new tab or window.



### 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).



## 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):

Work Area Lookup ?
create new \* required field

Department: BA-RPAS 🔍

Work Area: 1155

Description:

Effective Date From:  📅

Effective Date To:  📅

Active?:  Yes  No  Both

Show History:  Yes  No

One item retrieved. 1

	Actions	Department	Work Area	Description	Default Overtime Earn Code	Effective Date	Active?
	edit view	BA-RPAS	1155	HC Willkie Quad 6036492	OVT	01/01/1901	Yes

Work Area Document ?

Doc Nbr: 25062413    Status: INITIATED

Initiator: ktrinkle    Created: 03:52 PM 02/14

\* required field

Document Overview ▼ hide

Document Overview

+ Description: adding approver delegate for WA 1155

Organization Document Number:

Explanation:

Work Area Maintenance ▼ hide

Old	New
Effective Date: 01/01/1901	* Effective Date: 02/14/2014 <span style="font-size: x-small;">📅 *</span>
Work Area: 1155	Work Area: 1155
Description: HC Willkie Quad 6036492	* Description: HC Willkie Quad 6036492
Overtime Edit Role: Payroll Processor	* Overtime Edit Role: Payroll Processor ▼
Default Overtime Earn Code: OVT	Default Overtime Earn Code: OVT <span style="font-size: x-small;">🔍</span>
Department: BA-RPAS	* Department: BA-RPAS <span style="font-size: x-small;">🔍</span>
Admin Description: WILLKIE QD 6036492	Admin Description: WILLKIE QD 6036492
Active?: Yes	* Active?: <input checked="" type="checkbox"/>

Tasks ▼ hide

New Task

\* Effective Date: 02/14/2014 📅

Task:

\* Description:

Administrative Description:

\* Active?:

Roles ▼ hide

New Role

\* Effective Date: 02/14/2014 📅

Principal Id: 0123456739 🔍 📄

Name:

\* Role Name: Approver Delegate ▼

Expiration Date: 04/03/2014 📅

\* Active?:

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.

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

Department Lookup \* required field

Location:

Department:

Description:

Show History:  Yes  No

Active:  Yes  No  Both

One item retrieved. 1

Actions	Department	Description	Time Stamp	Active
<a href="#">edit</a> <a href="#">view</a>	UA-FMOP	FMS ADMINISTRATION	11/16/2010 12:00 AM	Yes

Export options: CSV | Excel | XML

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).

The screenshot shows a web application interface for a 'Department Document'. At the top, it displays 'Doc Nbr: 25062417', 'Status: INITIATED', 'Initiator: ktrinkle', and 'Created: 04:56 PM 02/14/2014'. Below this are sections for 'Document Overview' and 'Department Maintenance'. The 'Roles' section is highlighted with a red box, showing a 'New Role' form with the following fields: 'Effective Date' (02/14/2014), 'Principal Id' (0123456789), 'Role Name' (Payroll Processor Delegate), 'Expiration Date' (04/06/2014), and 'Active' (checked). An 'add' button is located at the bottom of the form.

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'.
    - (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.