2025

UKG/LoboTime 2.0

JOB AIDS

VERSION 1

Contents

Manager/Org Manager Job Aids

Job Aid: Logging in to UKG Pro via Computer or Mobile App

Access via MyUNM:

The LoboTime tile in **myUNM.edu → Staff tab → Lobotime Tile** which will send you directly to the new UKG Pro LoboTime login page: UKG PROD Login

You will then be prompted to sign in using SSO. You should utilize your @unm.edu or @salud.unm.edu email address and password to login.

Mobile App Access:

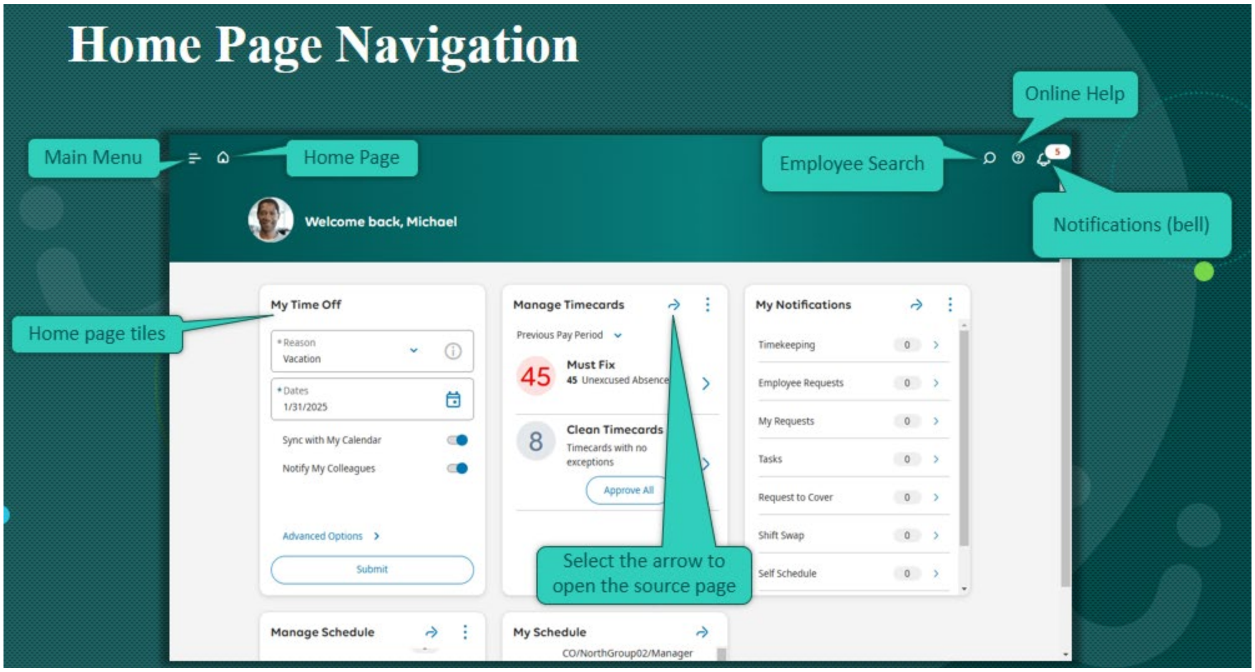
UKG now offers a mobile app for added convenience:

1. Search for **"UKG Pro"** in your device's app store.
   - Icon: Dark green background with yellow lettering.
2. After downloading, the app will prompt you to connect to a **workspace**.
   - Copy and paste this link: UKG PROD Login
3. Sign in using **SSO** and set up **facial recognition** if desired.

Job Aid: Navigating Your UKG Pro Home Page

Purpose:

Understand the layout and features of the UKG Pro Home page for quick access to tools and information.



Steps:

1. **Use the Persistent Banner**
    a. **Main Menu:** Access timecards, Dataviews, and reports.
    b. **Home Icon:** Return to the Home page.
    c. **Employee Search:** Quickly find employees and access their records.
    d. **Online Help:** Search for instructions.
    e. **Notifications:** Click the bell icon to view alerts.

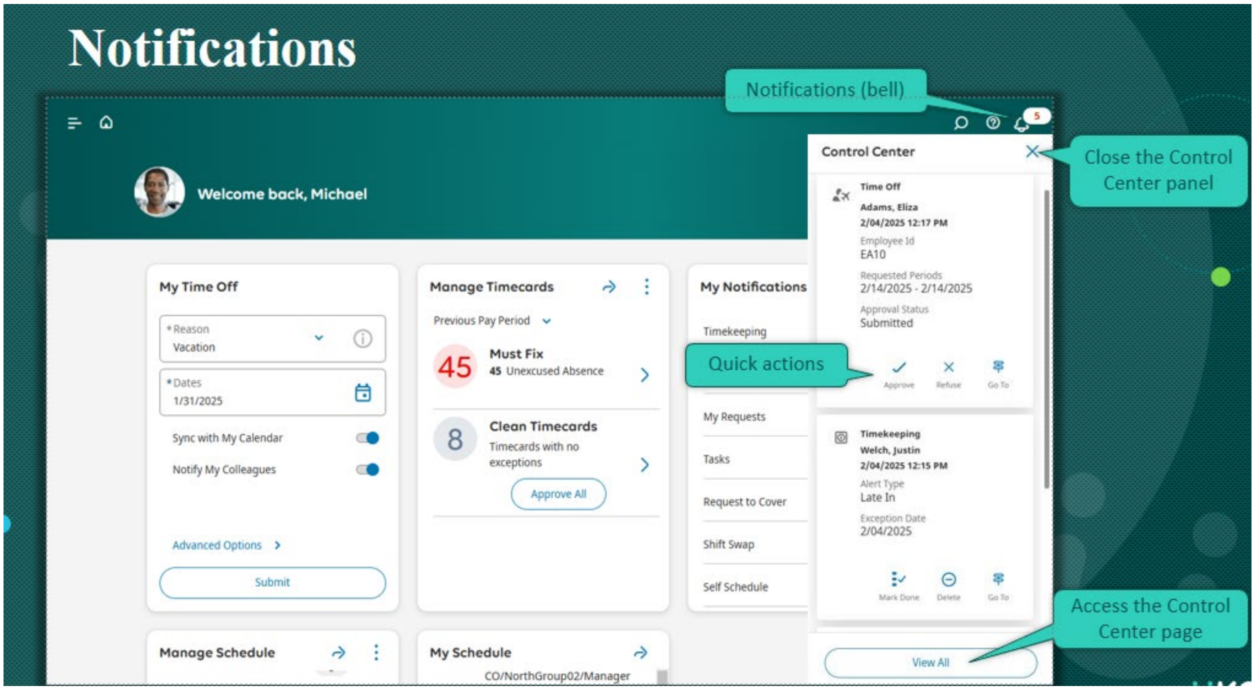
2. **Explore Home Page Features**
    a. View and customize tiles.
    b. Open source pages via tile arrows.
    c. Perform quick actions (e.g., submit time-off requests).

Tip: Use the banner for navigation and tiles for quick actions.

Job Aid: Using the Control Center Panel

Purpose:

Manage notifications and take quick actions without leaving the page.



What You Can Do from the Control Center Panel

- **View Notifications:** See the number of notifications that require your attention.

  Example: The panel shows **5 notifications** pending review.

- **Take Quick Actions:** Mark notifications as **Done** or respond directly.

  Example: Approve a time-off request without opening additional details.

- **Go To Detailed View:** Select **Go To** to open the relevant page for more information.

  Example: Jump to an employee's timecard for timekeeping exceptions.

- **View All Notifications:** Select **View All** to open the full Control Center page and review notifications by category.

  Example: Check older notifications or see full details of a time-off request.

- **Close the Panel:** Click the **X** in the upper-right corner to close the Control Center panel.

Steps to Review Notifications

1. **Open the Panel**

Click the **Notification (bell)** icon.

2. **Respond to Requests**
    a. Select **Approve** or **Refuse** for time-off requests.
    b. Use **Quick Actions** for other notifications.
3. **Access Details**

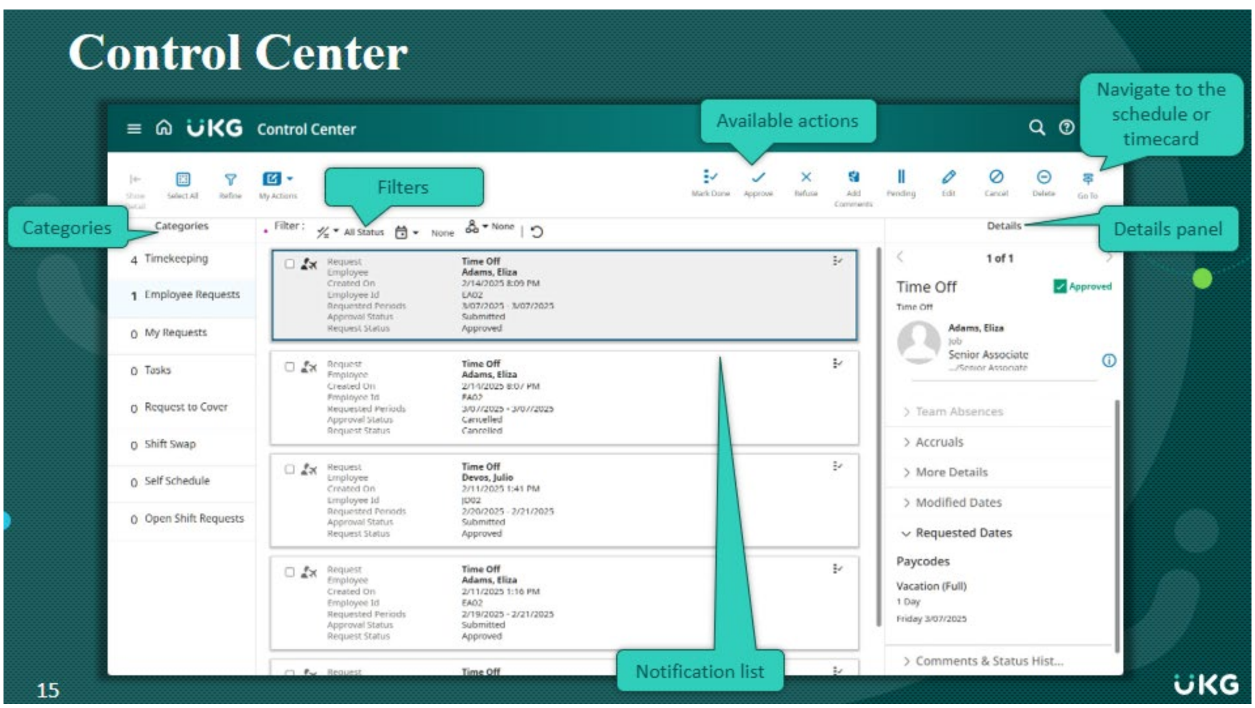
    Click **Go To** to navigate directly to the employee's timecard or request.

4. **Clear Notifications**
    a. Select **Mark Done** to remove the notification from the panel.
    b. Select **Delete** to permanently remove it (no history is retained- only delete if it was a mistake).

Job Aid: Using the Control Center Page

Purpose

The Control Center page provides a detailed view of notifications and allows you to manage current and past notifications efficiently.



What You Can Do in the Control Center

- **View Notifications by Category**

  Example: Select **Employee Requests** to handle time-off requests immediately.

- **Filter Notifications**

  Example: Display only notifications from a specific date or review previously completed notifications.

- **Review Notification Details**

  Example: Check comments or additional information submitted with a time-off request in the **Details** panel.

- **Take Action on Notifications**

  Example: Use action icons above the Details panel to **Approve**, **Refuse**, or handle requests.

How to Open the Control Center Page

- From the **Home Page**, click the **Notification (bell)** icon, then select **View All**.
- Or, select the arrow on the **My Notifications** tile.

Steps to Manage Notifications

1. **Select a Category**

   Choose the relevant category (e.g., Employee Requests).

2. **Choose a Notification**

   Click a specific notification to view its details.

3. **Act on the Notification**

   Use the available **Action icons** (Approve, Refuse, etc.).

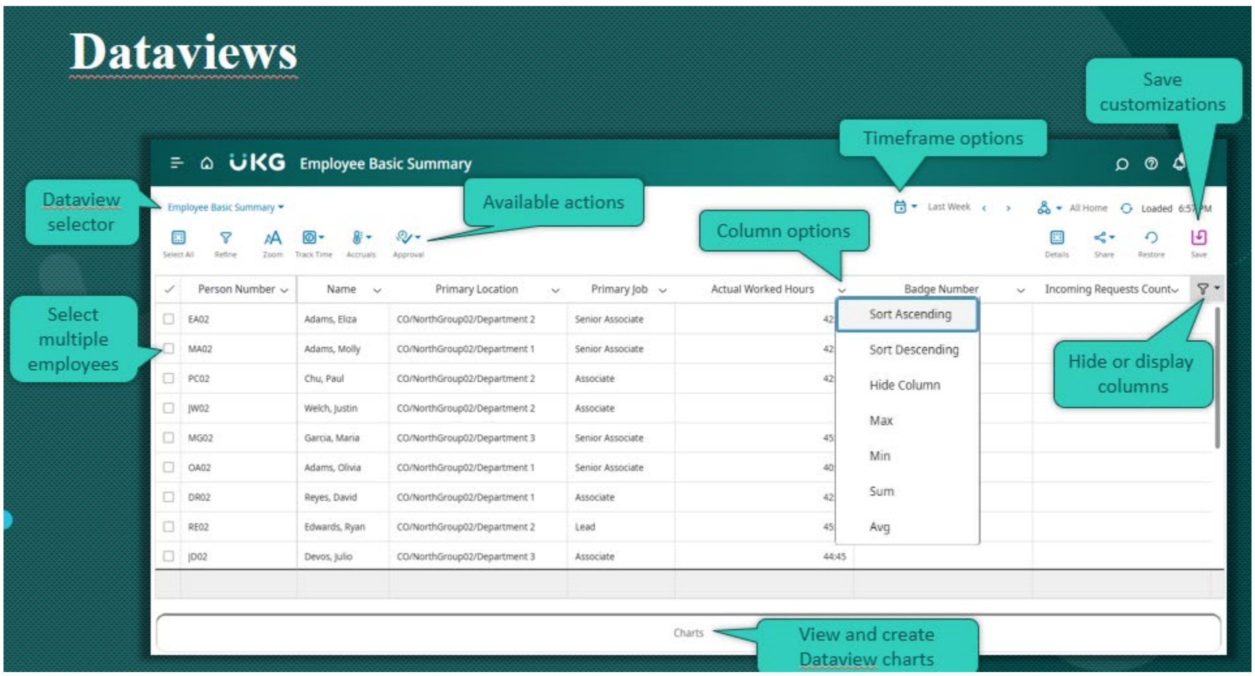
4. **Apply Filters**

   Use **Filter options** to narrow or expand the list of notifications.

Job Aid: Navigating and Using Dataviews

Purpose

Dataviews allow you to organize, analyze, and act on real-time data to make informed decisions.



Accessing Dataviews

- From the **Main Menu**, go to **Dataview & Reports**.
- Select the desired **Dataview** from the **Dataview Library**.

What You Can Do in a Dataview

- **Act on Selected Employees**

  Example: Select employees with cleared timecard exceptions and approve all timecards at once.

- **Filter Data**

Example: Show only employees with at least one Late In exception.

- **Sort Columns**

  Example: Sort the **Late In** column in descending order to see employees with the most exceptions at the top.

- **Apply Calculations**

  Example: Apply a **Sum** calculation to the **Worked Hours** column.

- **Group Data**

  Example: Group employees by **Primary Location**. Applied calculations will also aggregate by group.

- **Create Charts**

  Example: Generate a bar chart showing week-to-date overtime hours for your department.

Personalization Options

- **Save** your customized Dataview for future use.
- **Restore** to return to default settings.
- Use the **Dataview Selector** to switch between different Dataviews without returning to the Main Menu.

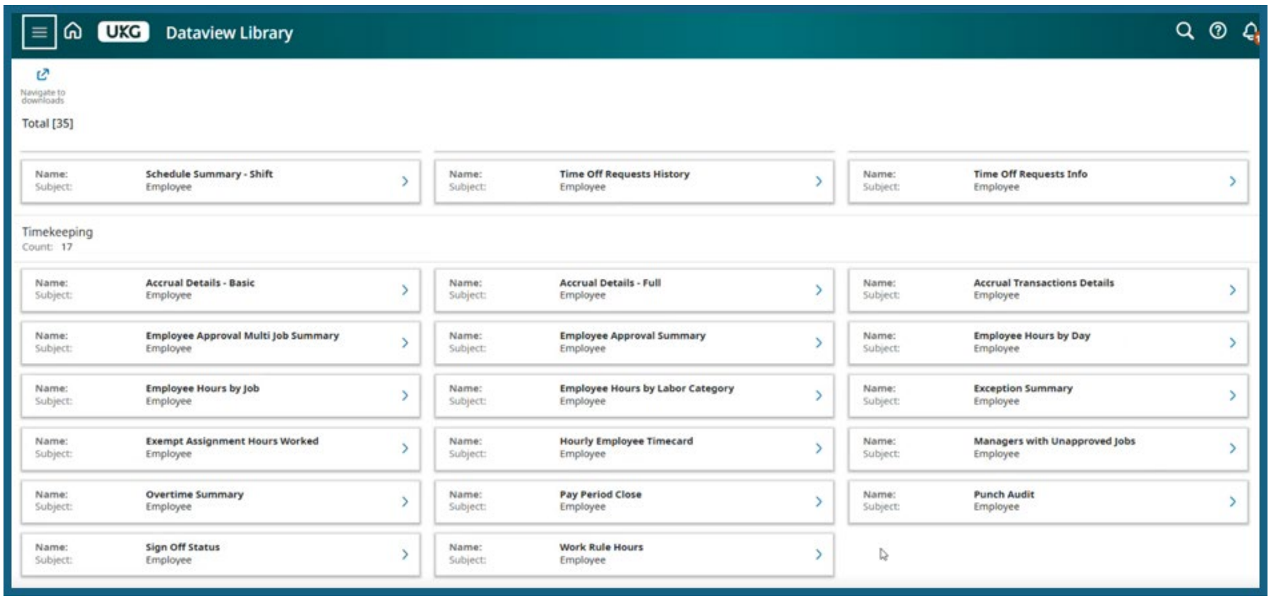
Steps to Navigate a Dataview

1. Access the **Dataview Library** and select a Dataview.
2. Optionally:
   a. Hide or show columns.
   b. Sort by any column.
   c. Add calculations to columns.
   d. Group data by a column.
   e. Save your personalized view.

Job Aid: Common Data Views

Purpose

Pay Period Close and Sign-off Status Dataviews are commonly used to verify timecard accuracy and readiness before payroll processing. They identify issues that must be resolved before approvals and signoffs can occur.



1. Pay Period Close Dataview

What it shows:

- **Sign-Off Status**: Indicates whether each employee's timecard has been signed off (True or False).
- **Employee Details**: Employee ID, name, and organizational hierarchy.
- **Missed Punches**:
  - Missed In Punch: Employee did not clock in.
  - Missed Out Punch: Employee did not clock out.
- **Unexcused Absences**: Scheduled work with no recorded time or absence code.
- **Scheduled vs. Actual Hours**: Displays total scheduled hours and total actual hours worked.
- **Approval Status**:
  - Employee Approval: Shows if the employee approved their timecard.

    - Manager Approval: Shows if the manager approved after the employee.

Why it matters:
Any missed punches, unexcused absences, or missing approvals must be corrected before payroll can close.

2. Sign-Off Status Dataview

What it shows:

- Departments and employees who have **completed sign-off**.
- Difference between Approve vs. Sign-Off:
    - **Approve**: Allows further edits and re-approval.
    - **Sign-Off**: Locks the timecard and prevents further edits.

Why it matters:
Sign-off is the final step before payroll processing. Use this report to confirm that all timecards are locked and ready.

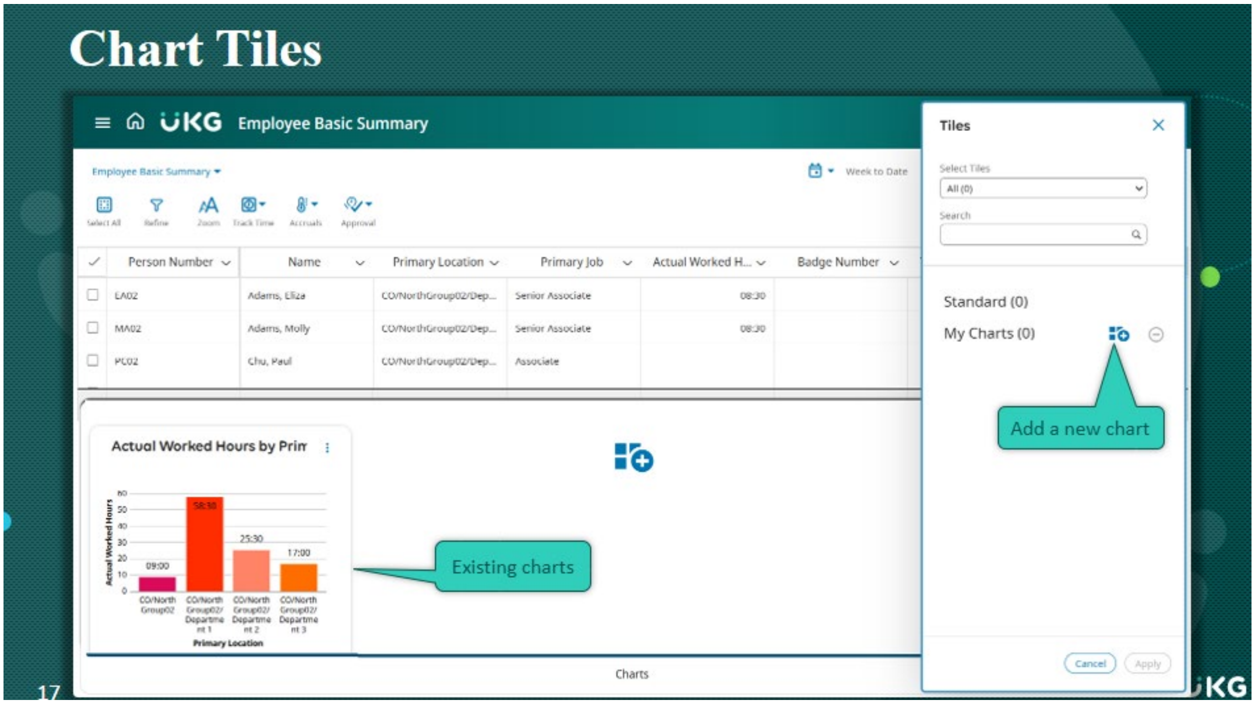
Key Actions Before Closing Payroll

- Resolve missed punches and unexcused absences.
- Ensure employee and manager approvals are complete.
- Confirm sign-off status for all employees.

Job Aid: Creating Charts in Dataviews

Purpose

Charts provide a visual representation of data from a specific Dataview (e.g., Overtime Analysis). Charts update dynamically as the underlying Dataview changes and can be added to your Home page for quick access.



Key Points

- Charts are created **within Dataviews**.
- You can choose the chart type (e.g., Pie, Bar, Line) and specify metrics and values.
- After creating a chart, you can add it as a **tile on your Home page**.

Steps to Create and Add a Chart

1. **Access the Dataview**
    a. Navigate to the appropriate Dataview from the **Dataview Library**.
2. **Open the Chart Tab**
    a. Select the **Chart** tab at the bottom of the page.
3. **Create the Chart**
    a. Click the **Tile Library** icon.
    b. In the Tiles panel, select **Create Chart**.
    c. Specify the **Category** and **Metric** to display.
    d. Choose your preferred visualization type (Pie, Bar, Line).
    e. Click **Save**.
4. **Add the Chart to the Home Page**
    a. Go to the **Home page**.
    b. Select the **Tile Library** icon.
    c. Find your chart and click **Apply**.

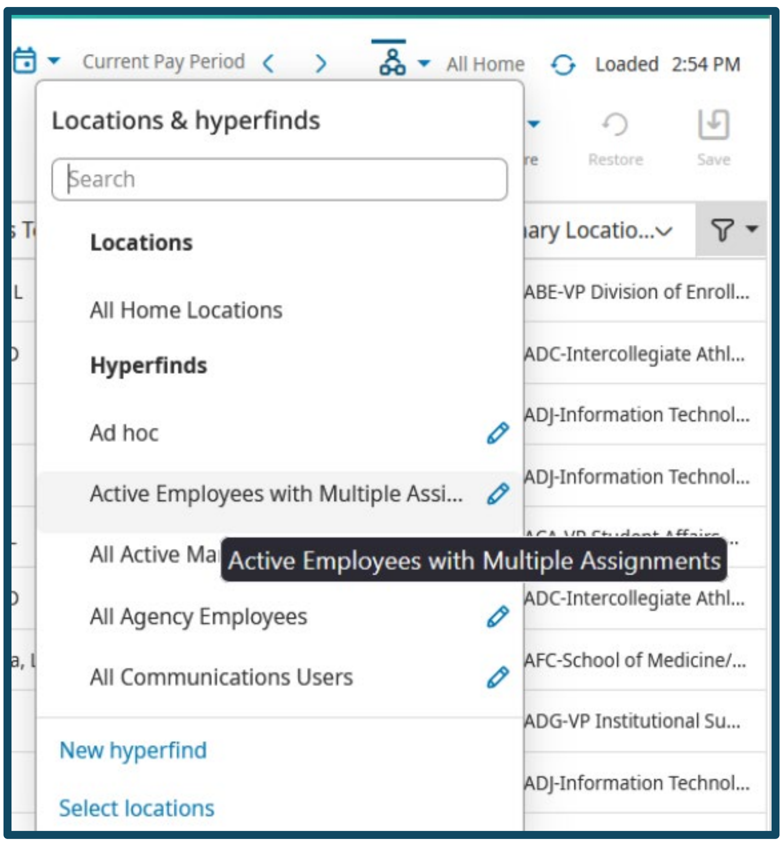
Job Aid: Hyperfind Queries

Purpose

Hyperfind is a search function that managers use within various system components to find employees who match specified search criteria.

For example, in a Dataview, managers click Select Timeframe and Select Hyperfind to display the appropriate employees as of the selected date. The results of the query depend on the manager's access rights as well as the employees the manager can access.

For example, managers with the appropriate access rights can also click Create Hyperfind within the Hyperfind drop-down box to modify or create Hyperfind queries in the Hyperfind Editor.



Below is a list of **Hyperfind Templates** already in the system and what they mean:

NAME	Description of Hyperfind
Active Employees with Multiple Assignments	This query finds all employees who have more than one job/assignment in a UKG Organization, one of which is within your Employee Group and/or Organizational Group that are active or employed and working as of today.
All Active Managers	This query finds all managers in my Employee Group and/or Organizational Group that are active or employed and working as of today.
All Home	This query finds all people in my Employee Group and/or Organizational Group that are active or employed and working as of today.
All Home and Scheduled Job Transfers	This query finds all employees in my Employee Group and/or Organizational Group, as well as those with jobs scheduled in my Organizational Group.
All Home and Transferred-in	
All People	It includes all employees past, present and future and not just active employees, it also includes any terminations.
Employee Timecard Approval	Query of Employee's who have approved their timecard
Employee Timecard Not Approved	Query of Employee's who timecards are not approved.
Employees with Comp Payout	Select all employee(s) with a Comp Payout balance
Employees with Unapproved Timecards	This query finds all people in my Employee Group and/or Organizational Group whose timecards are not approved.
Exempt Employees	Query for all UNM Monthly Employees
GB Bi-Weekly Graduate Student	Query for GB Bi-Weekly Graduate Student
Manager with Unapproved Timecards	This query finds all people in my Employee Group and/or Organizational Group whose manager has not approved their timecard.
Managers	Hyperfind Query only for managers
Multiple Assignments	
Non-Exempt Employees	Query for all Non-Exempt Pay Rules

Reports To Hierarchy	This hyperfind is used to identify Home Employees based on their Reports To Manager??
Reports To Logged On User	??
SC Contract, SD Temporary Monthly, SE Monthly, SN Shift 1 FT, SN Shift 1 PT, SN Shift 2 FT, SN Shift 2 PT, SN Shift 3 FT…	Query for each eClass/Pay Rule individually
Terminated and Inactive Employees	This query finds all people in my Employee Group and/or Organizational Group that are not active as of today.
Terminated Employees	

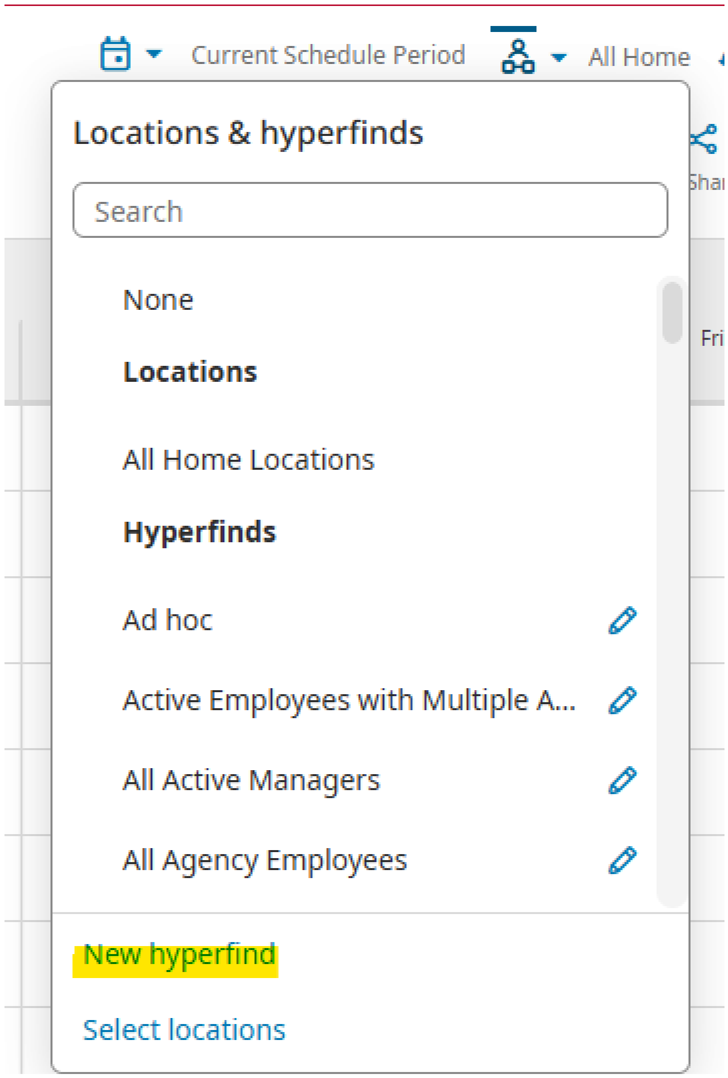
Job Aid: Create a New Personal Hyperfind:

Purpose

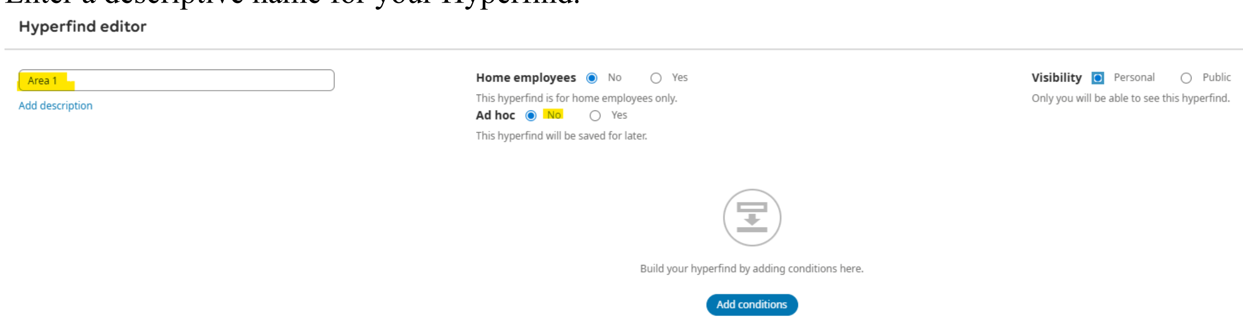
This job aid explains how to create and use Hyperfinds in UKG. Hyperfinds are custom filters that allow you to view only specific employees or groups within your organization. They are especially useful for managers or HR staff who have access to more employees than they need to manage, helping streamline navigation and reduce clutter.

Steps

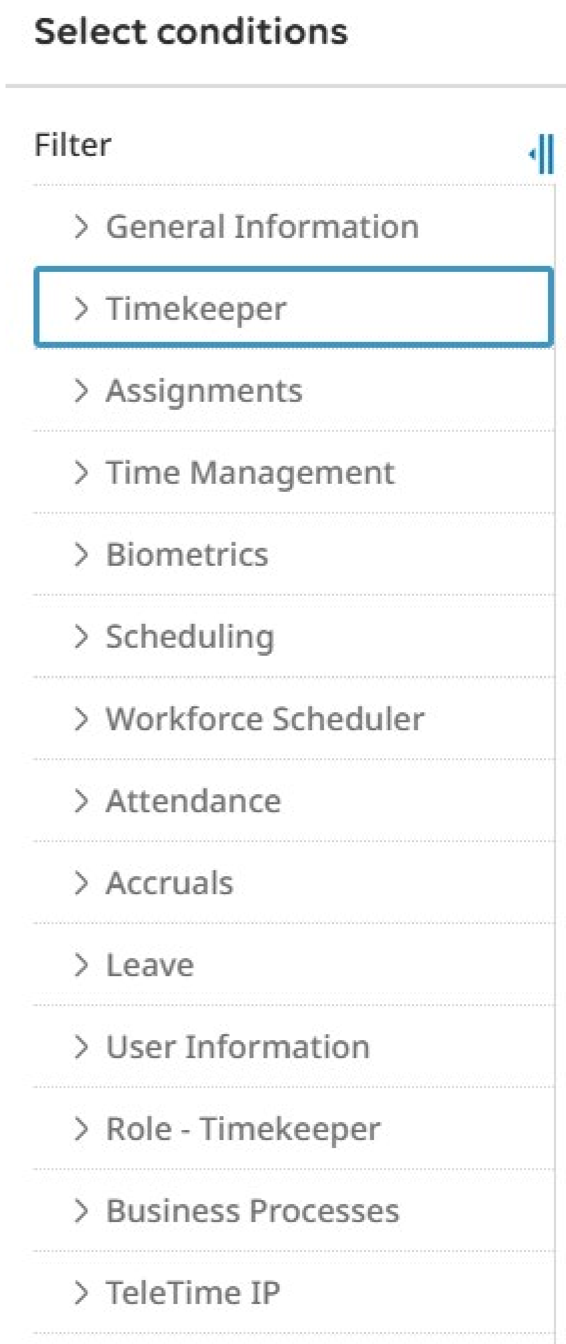
1. Click the **Hyperfind** button from the timecard, schedule, or dataview page.
2. Select **New Hyperfind**.



3. Change **Ad Hoc** to **No**.
4. Enter a descriptive name for your Hyperfind.



5. Click **Add Conditions** and select the appropriate orgs.
   a. Note: You will add conditions one at a time using the Filters on the left-hand side.

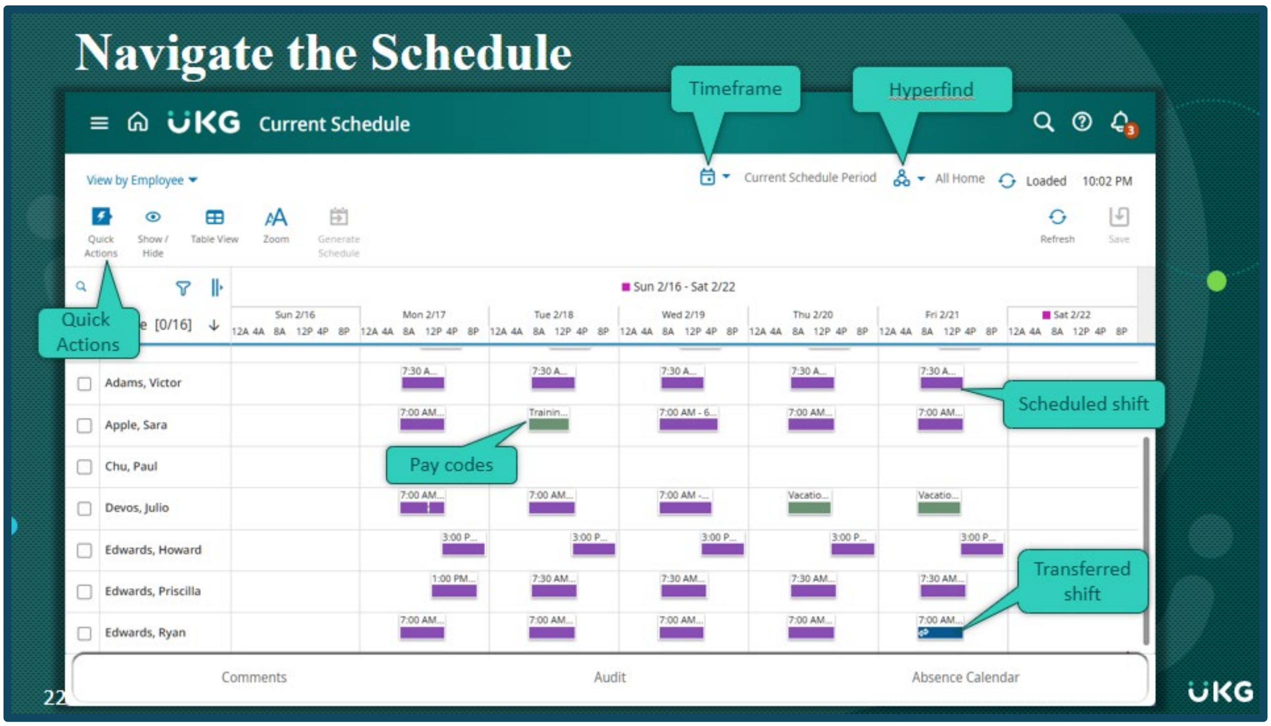


6. Click **Add**, then **Apply**.
    a. You can use the **Test Hyperfind** link in the bottom left to test if the parameters are working correctly.
7. Review your selections and click **Save**.
    a. **Note:** The Hyperfind will only be visible to you, so each individual will need to setup **personal hyperfinds** outside of the templates. You can make **edits** to your existing hyperfinds by clicking the **pencil button** next to the name of the hyperfind.

Job Aid: Using Hyperfinds and Navigating the Schedule

Purpose

Hyperfinds are organized, customizable groups of employees—similar to filters—that help managers quickly view and manage employee data. The **Current Schedule** allows you to view, modify, and create employee schedules in an interactive grid.



Key Features

- **Hyperfinds**
  - Act as filters to display specific employee groups.
  - Useful for managing large teams efficiently.
- **Schedule Grid**
  - Rows = Employees
  - Columns = Time units
  - Displays shifts, open shifts, holidays, availability, vacations, sick days, and more.
- **Scheduler Tools**
  - Grouping strategies
  - Templates and recurring patterns
  - Automatic schedule generation
  - Collapsible columns and tabs for additional details

Steps to Navigate the Schedule

1. **Select Current Schedule**

   Access the schedule from the main navigation.

2. **Change Timeframe**

   Use the **Timeframe** drop-down to select the desired period.

3. **Change Location or Hyperfind**

   Use the **Locations & Hyperfinds** drop-down to filter by location or employee group.

4. **Switch Views**

   Toggle between **Table View** and **Gantt View** for different visual perspectives.

5. **Show/Hide Options**

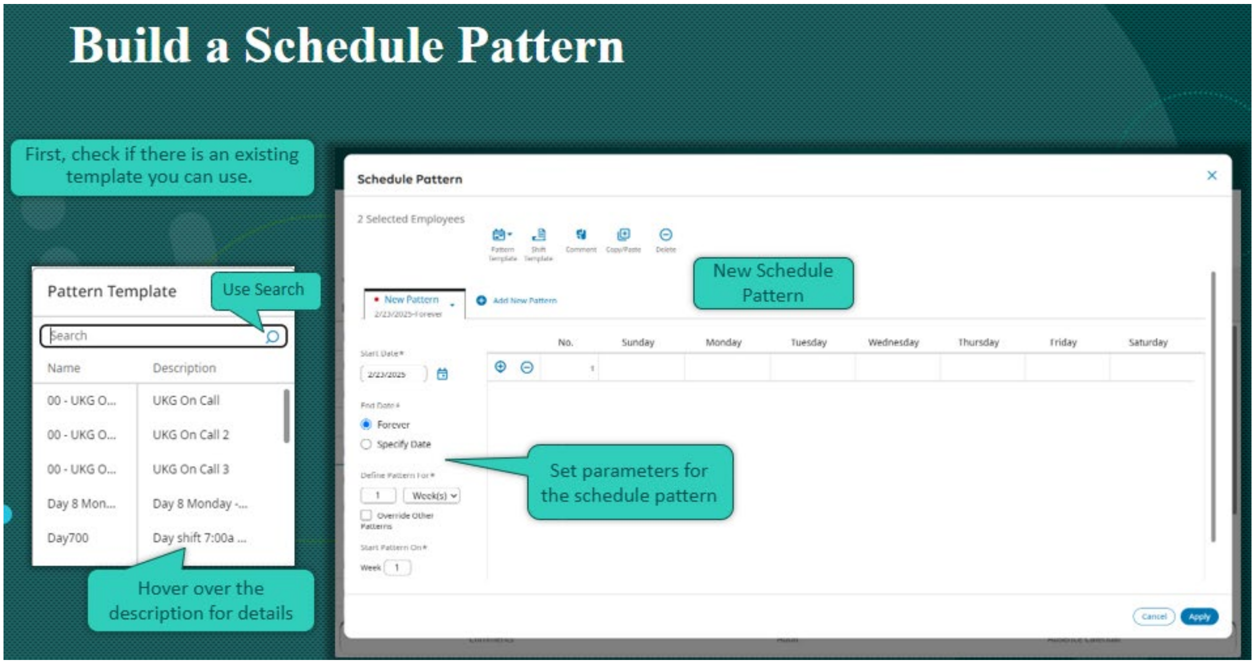
   Click the **Show/Hide** icon to customize visible columns and panels.

Job Aid: Creating a Schedule Pattern

Purpose

Schedule patterns allow managers to create consistent schedules for employees using either a new pattern or a pre-defined shift template. Patterns can be applied to:

- A single employee
- Multiple employees
- A schedule group
- Employees with the same employment terms



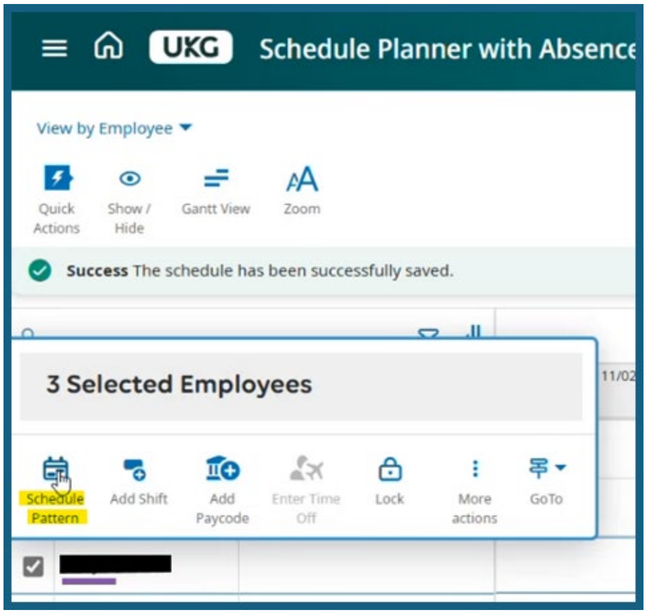
Before You Begin

- Verify **parameters**:
  - **Start Date** and **End Date**
  - Select **Override Other Patterns** if the new pattern replaces an existing one.

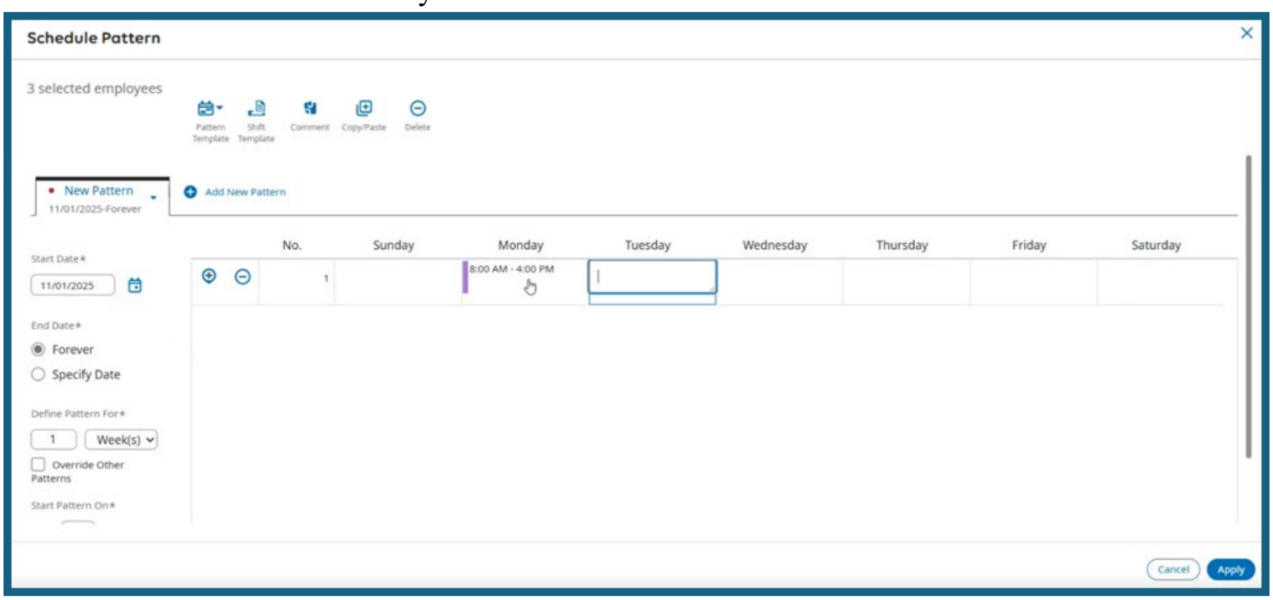
Important Note: The **start date** should reflect the beginning of the pattern, **not** the employee's hire date.

Steps to Create a Schedule Pattern

1. Select employees.
2. Right-click on one of the employees selected.
3. Select Schedule Pattern.

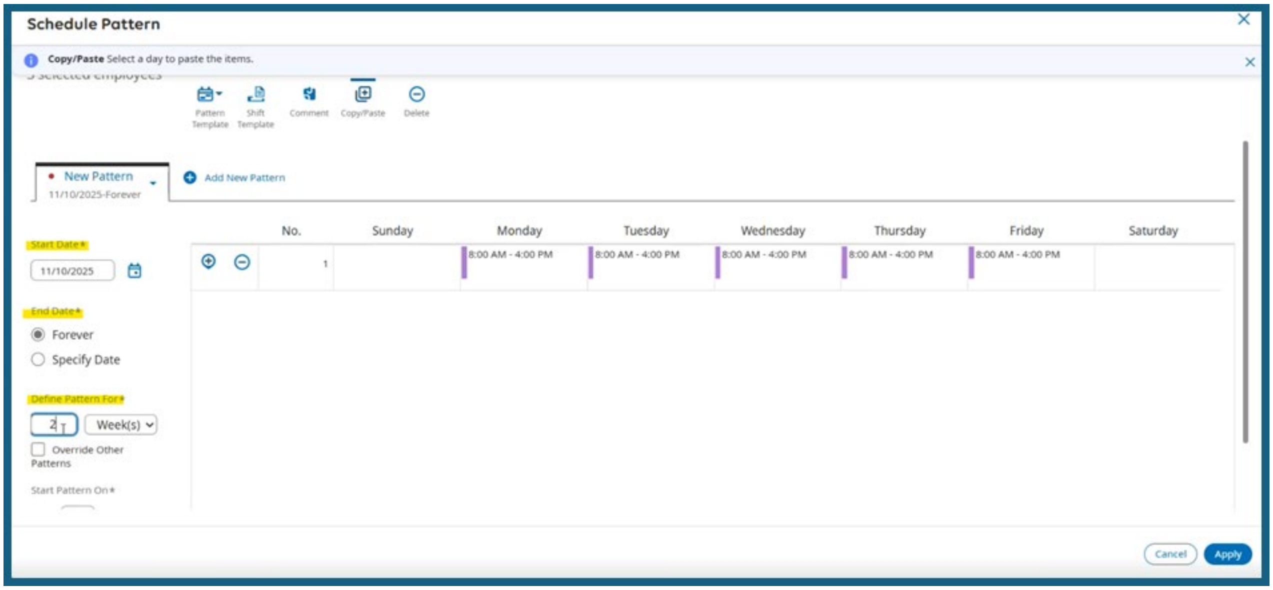


2. Enter start/end times for each day.

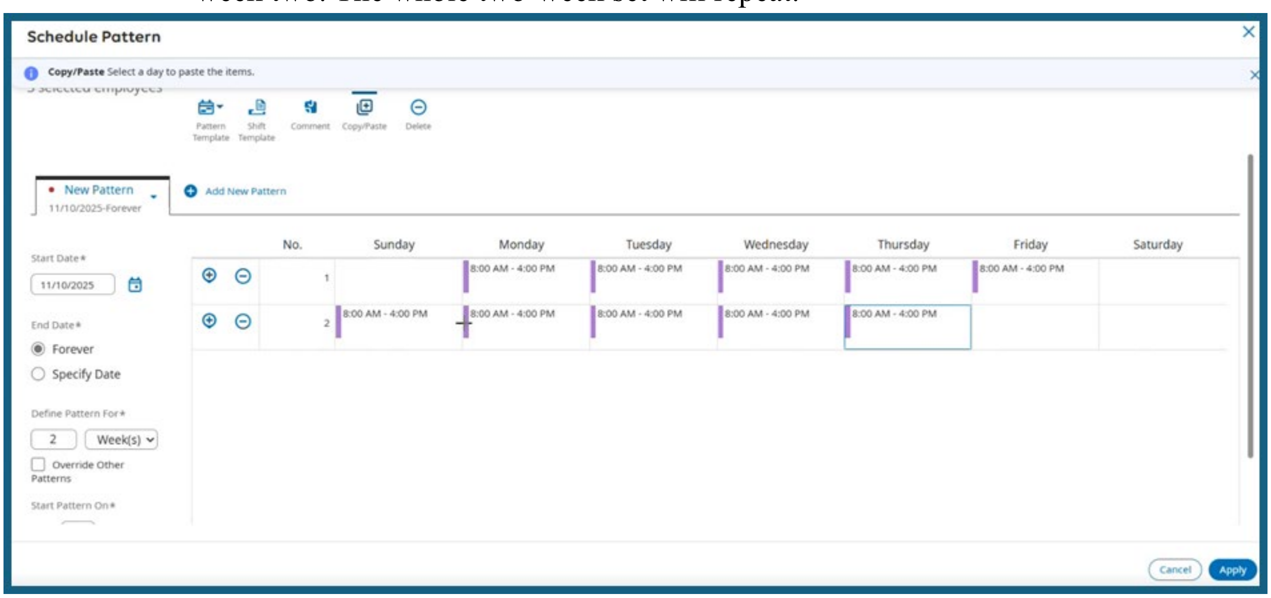


3. Define Start Date for Schedule Pattern
    a. The start date of the schedule pattern must match the schedule's intended start day.
       Example: If an employee starts on Wednesday and the pattern begins that day, Monday and Tuesday will remain unscheduled. Always set a start date that covers the entire pattern period.

4. Define pattern duration:
    a. Forever or Specific date range.



5. For patterns that repeat over a period of more than one week, you can:
    a. Change period to 2-4 weeks, enter shifts accordingly, and the shifts will repeat after the full defined schedule period has passed.
    Example: Employee works Monday-Friday week one, and then Sunday-Thursday week two. The whole two-week set will repeat.

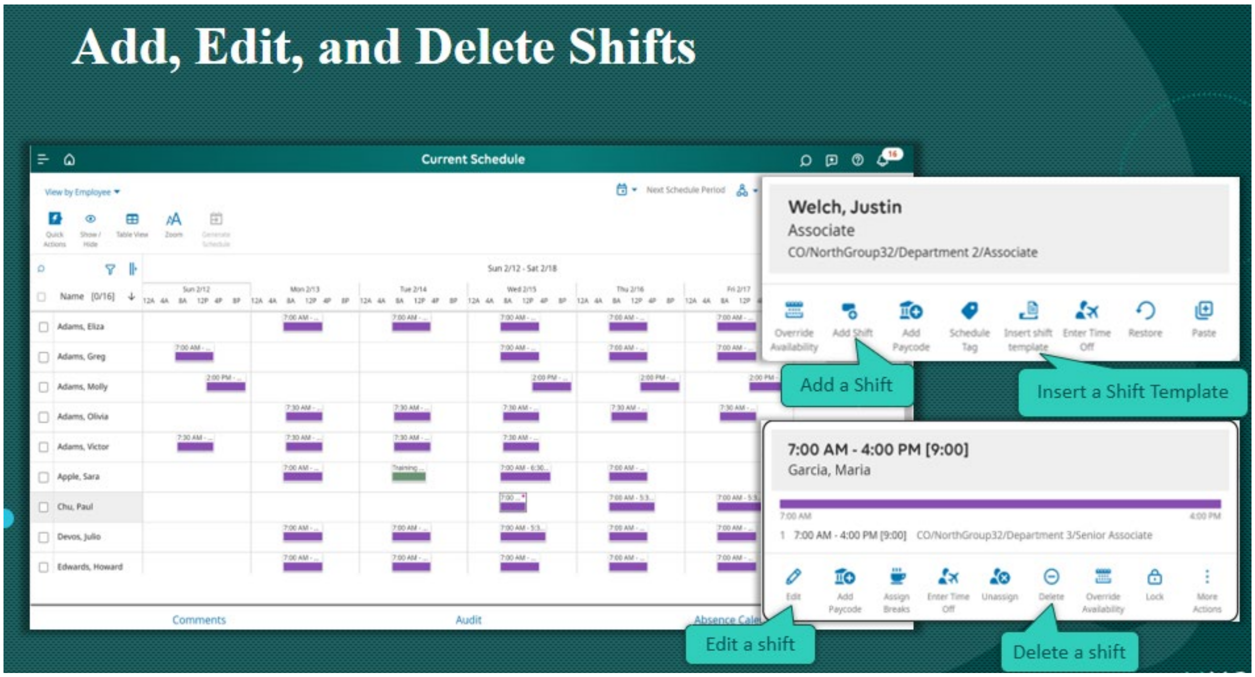


6. Apply work rules or shift templates as needed following the same instructions above.
7. Apply and Save.

Job Aid: Modifying Employee Schedules

Purpose

Managers can edit, add, or delete shifts to keep schedules accurate and aligned with business needs.



What You Can Do

- **Edit Existing Shifts**

  Example: Change the end time if an employee agrees to stay later.

- **Add Shifts**

  Example: Insert extra hours using an ad hoc shift or a pre-defined template.

- **Delete Shifts**

  Example: Remove scheduled hours if an employee is not needed.

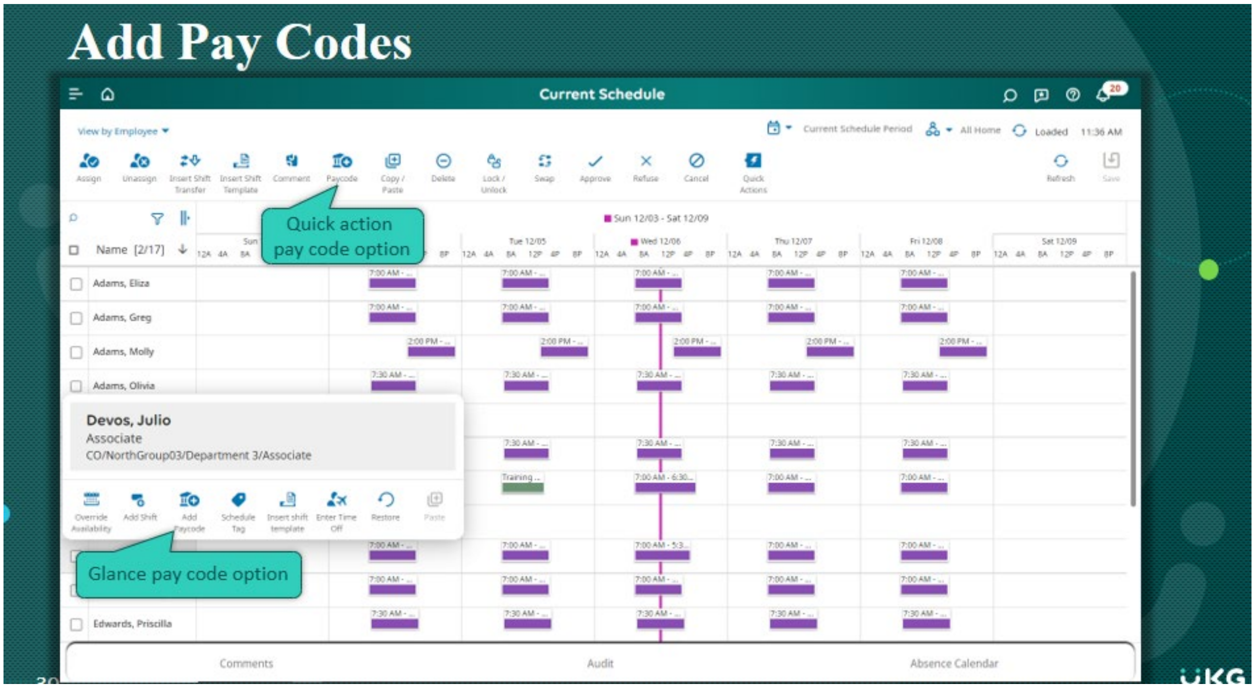
Steps to Edit, Add, or Delete Shifts

1. **Edit a Shift**
    a. Right-click the shift.
    b. Select **Edit**.
    c. Make necessary changes.
    d. Click **Apply**.
2. **Add a Shift**
    a. Right-click the applicable date cell.
    b. Choose one of the following:
        i. **Insert Shift Template** → Select a template.
        ii. **Add Shift** → Manually enter **Start** and **End** times.
3. **Delete a Shift**
    a. Right-click the shift.
    b. Select **Delete**.
4. **Save Changes**
    a. Click **Save** to finalize updates.

Job Aid: Using Quick Actions and Pay Codes in Schedules

Purpose

Managers can override shifts or apply pay codes to entire shifts or portions of shifts to accurately reflect non-productive time or special circumstances.



What You Can Do

- **Override a Regular Shift or part of a shift with a Pay Code**

  Example 1: Change a productive shift to sick leave when an employee calls out unexpectedly.

  Example 2: Replace part of a shift with annual leave pay code hours for car trouble the first two hours of their scheduled shift.

Steps to Use Quick Actions to Add Pay Codes

1. Expand the **Quick Actions** toolbar.
2. Select the **Pay Code** icon.
3. Choose the appropriate pay code.
4. Select the shift(s) where the pay code should be applied.
5. Click **Save**.

(Optional: Close the Quick Actions toolbar.)

Steps to Add a Pay Code to Part of a Shift

1. Right-click the shift and select **Add Pay Code**.
2. Choose the appropriate pay code.
3. Enter or select:
    a. **Start and End times** and/or **Duration**.
4. Ensure **Override Shift** is selected.
5. Edit/verify the **Create Open Shift** choice.
6. Click **Apply**.
7. Select **Save**.

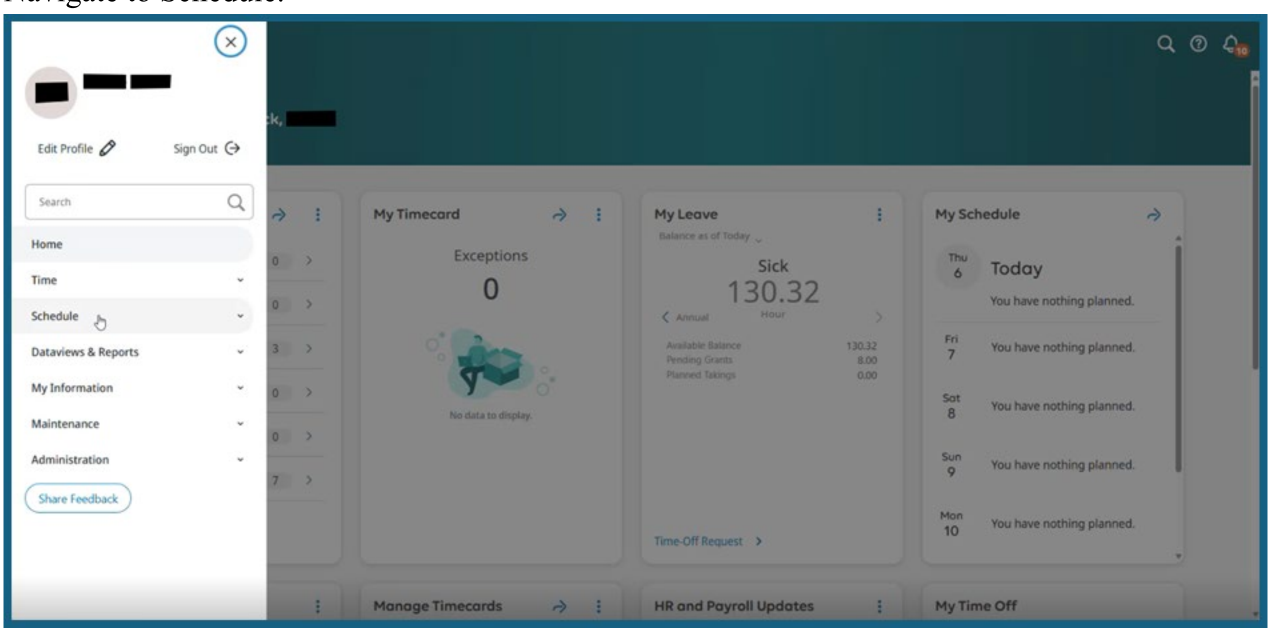
Job Aid: Creating Ad Hoc Schedules

Purpose

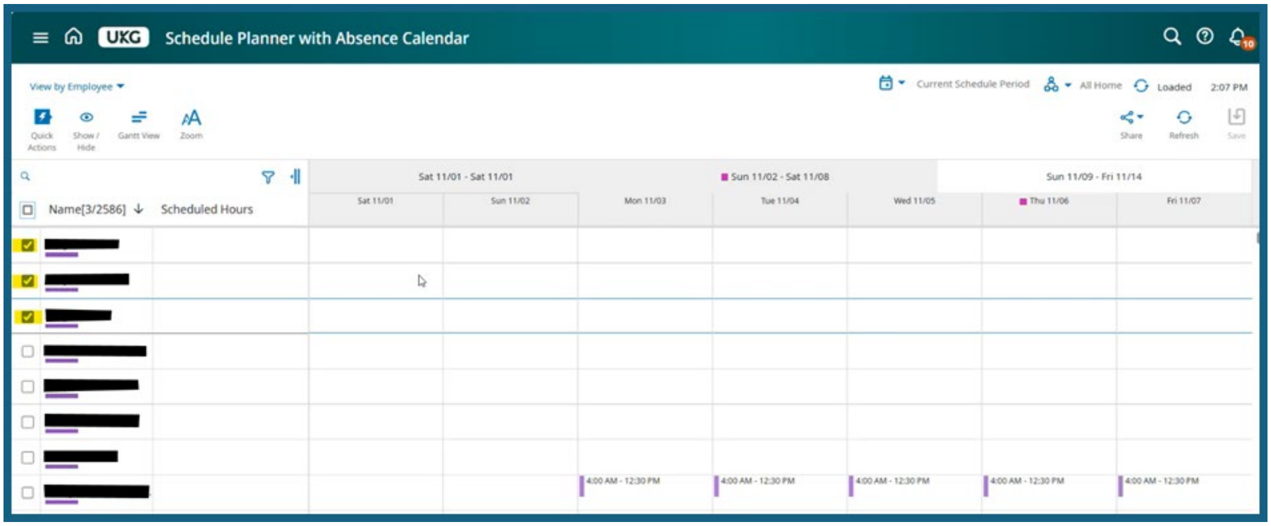
Add or edit schedules for individual employees on individual day(s) of the week. This is best used if you have non-repetitive schedules or need to make an ad hoc change to a particular day for an employee that already has a pattern assigned.

Steps:

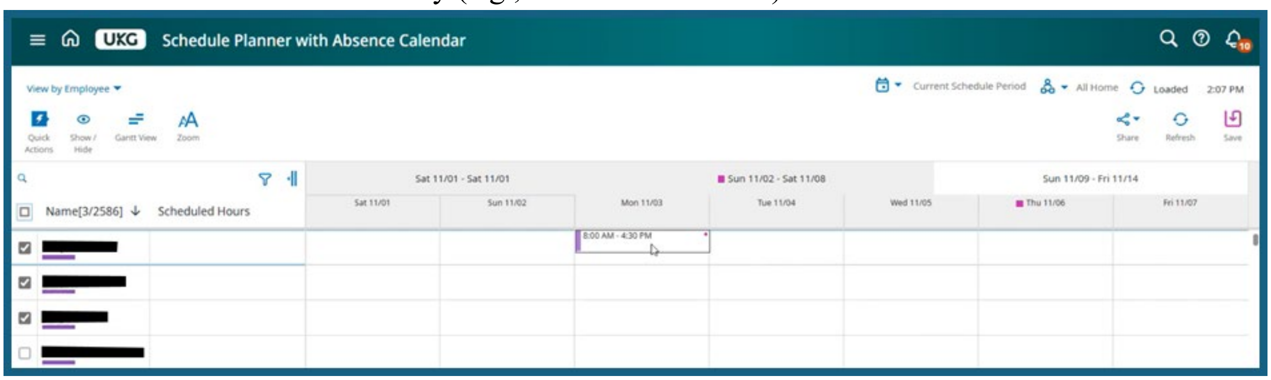
1. Navigate to Schedule.



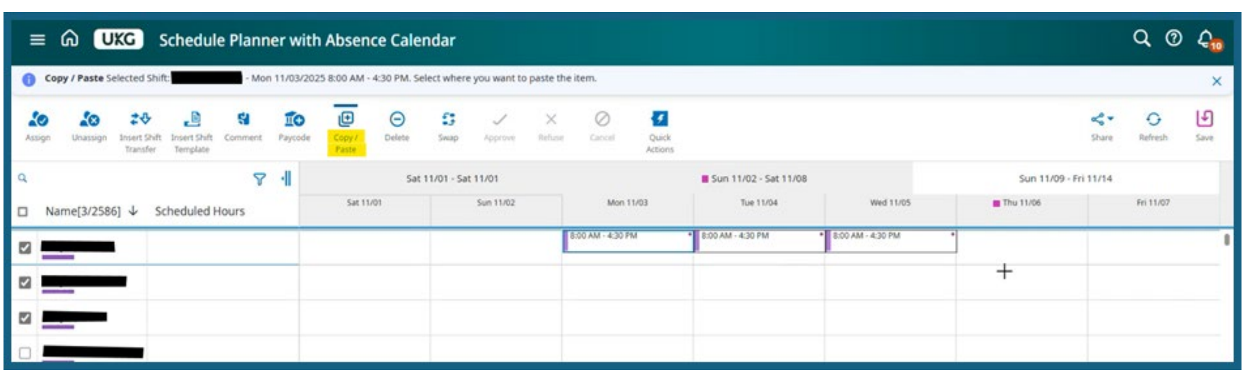
2. Select employee(s) without a schedule.



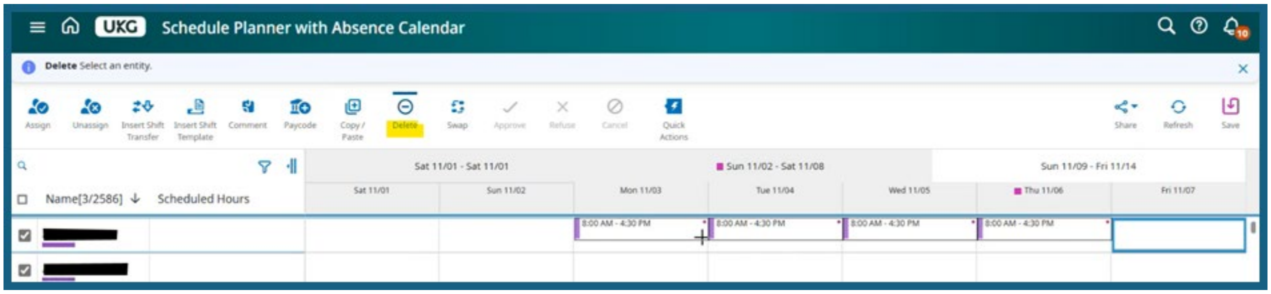
3. Enter start and end times manually (e.g., 8:00 AM–4:30 PM).



4. Use Quick Actions to open up more action options:
   - You can use the Copy/Paste function to apply schedules across multiple days or employees. Note: keyboard shortcuts for copy/paste also work.



- You can use the Delete function and then select any shifts you want to remove in order to delete incorrect entries. You can also use the delete button on your keyboard.



5. Click Save.

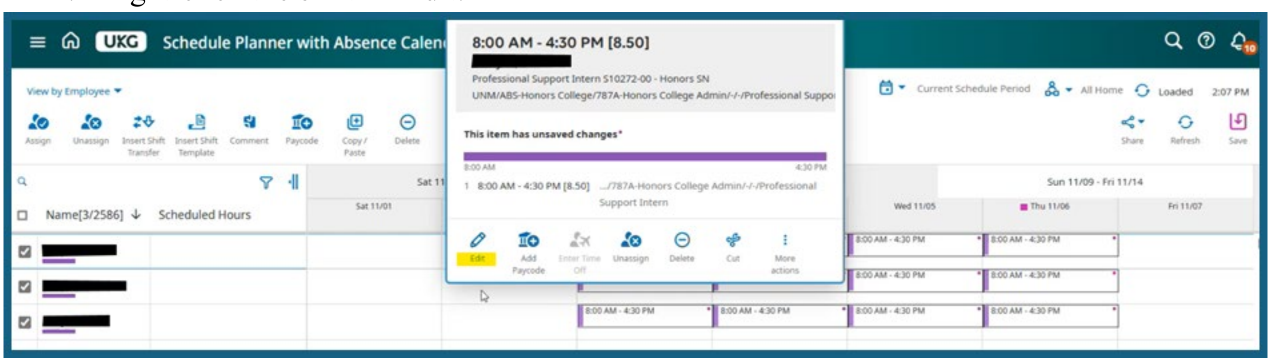
Job Aid: Adding Work Rule Transfers (Lunch Deduct)

Purpose

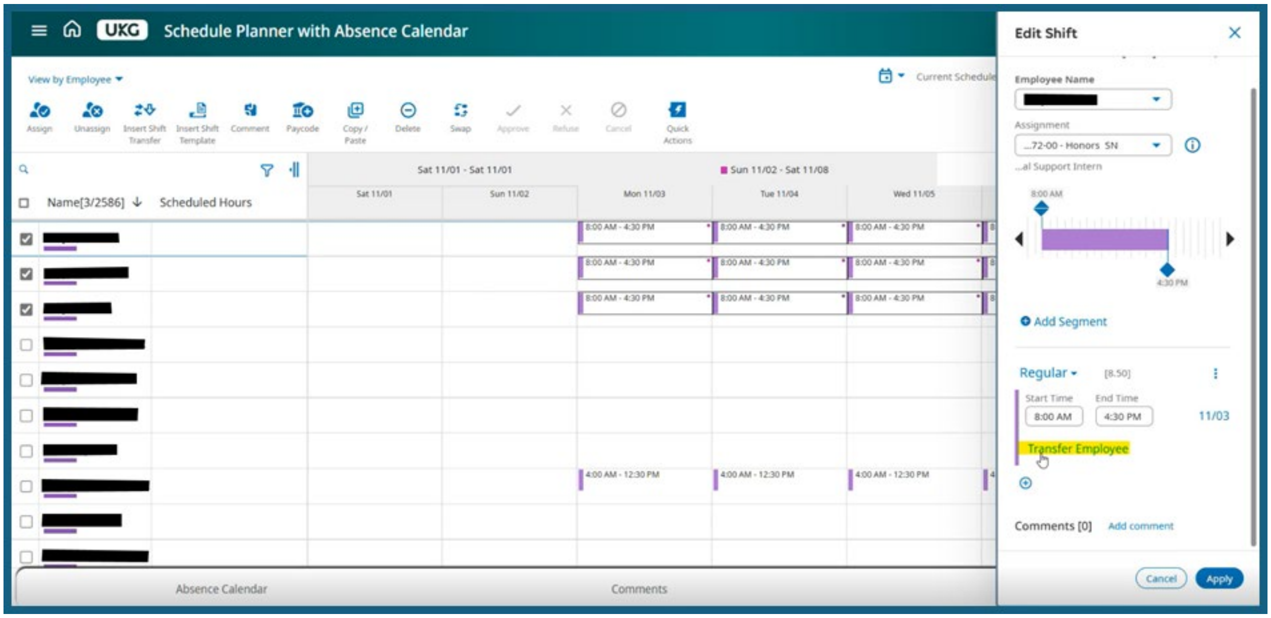
Apply automatic lunch deductions so an employee will not need to clock in/out for a lunch break.

Steps:

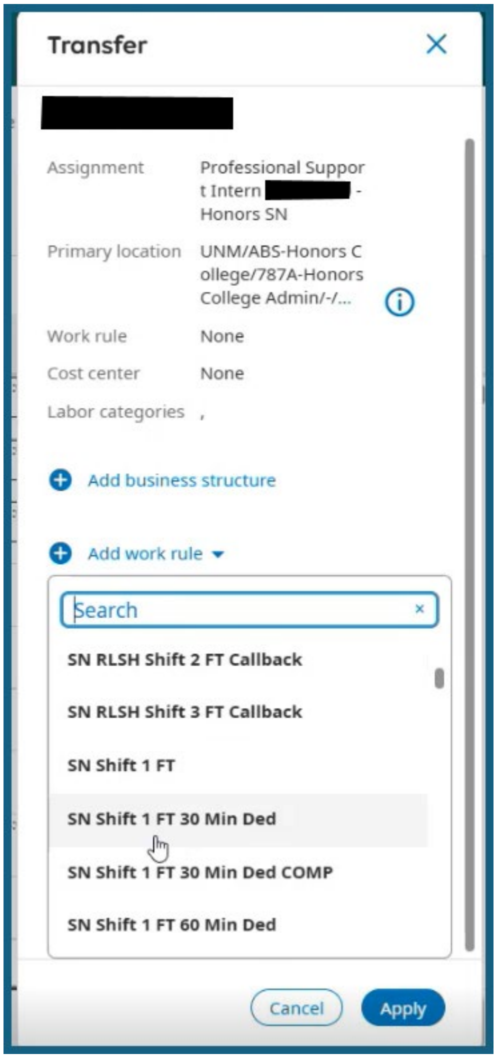
1. Right-click the shift → Edit.



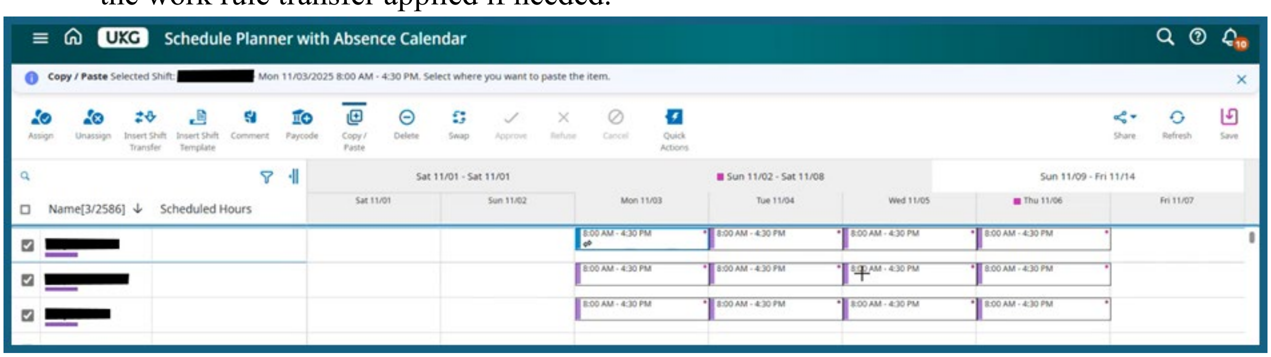
2. Select Transfer Employee.



3. Click on "Add Work Rule"
4. Choose the correct work rule (e.g., SN Shift 1 Full Time – 30 min lunch deduct). **Important Note**: You must select the correct work rule type that matches your employee type. For example, you would not select SN Shift 1 Full Time for an SW Shift 2 Full Time employee.



5. Click Apply and Save.
    a. If your Work Rule transfer applies correctly, it will show blue and have a transfer arrow symbol. You can then use your copy/paste option to replicate the shift with the work rule transfer applied if needed.



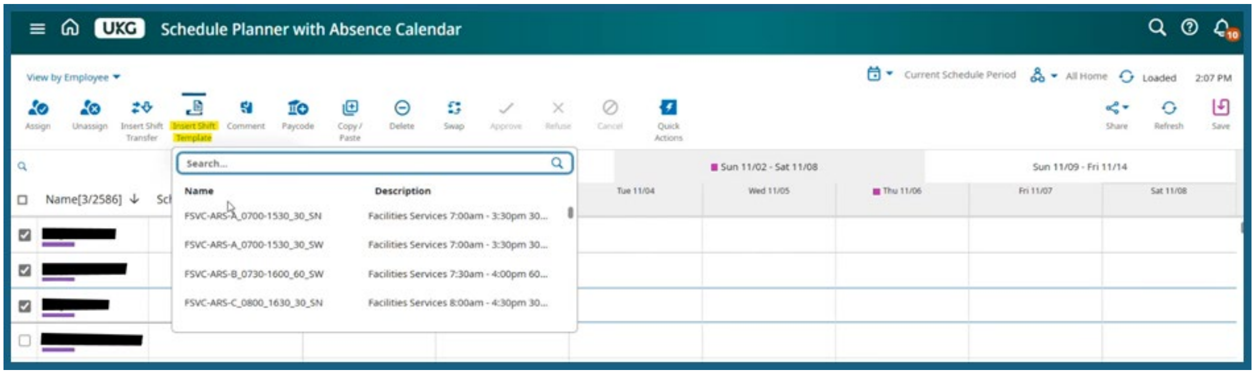
Job Aid: Using Shift Templates

Purpose

Apply pre-defined schedule times with or without work rules quickly. Note: Shift Templates can only be added by UKG Superusers, so contact time@unm.edu to manage templates for your area.

Steps:

1. Click Insert Shift Template.



2. Select the appropriate template (e.g., Facilities Services 7:00 AM–3:30 PM with 30-minute lunch deduct SN).
2. Click on desired day(s) to apply for desired employees, ensuring to match any work rule templates with the employee type.
3. Save changes.

Job Aid: Adding Break Segments

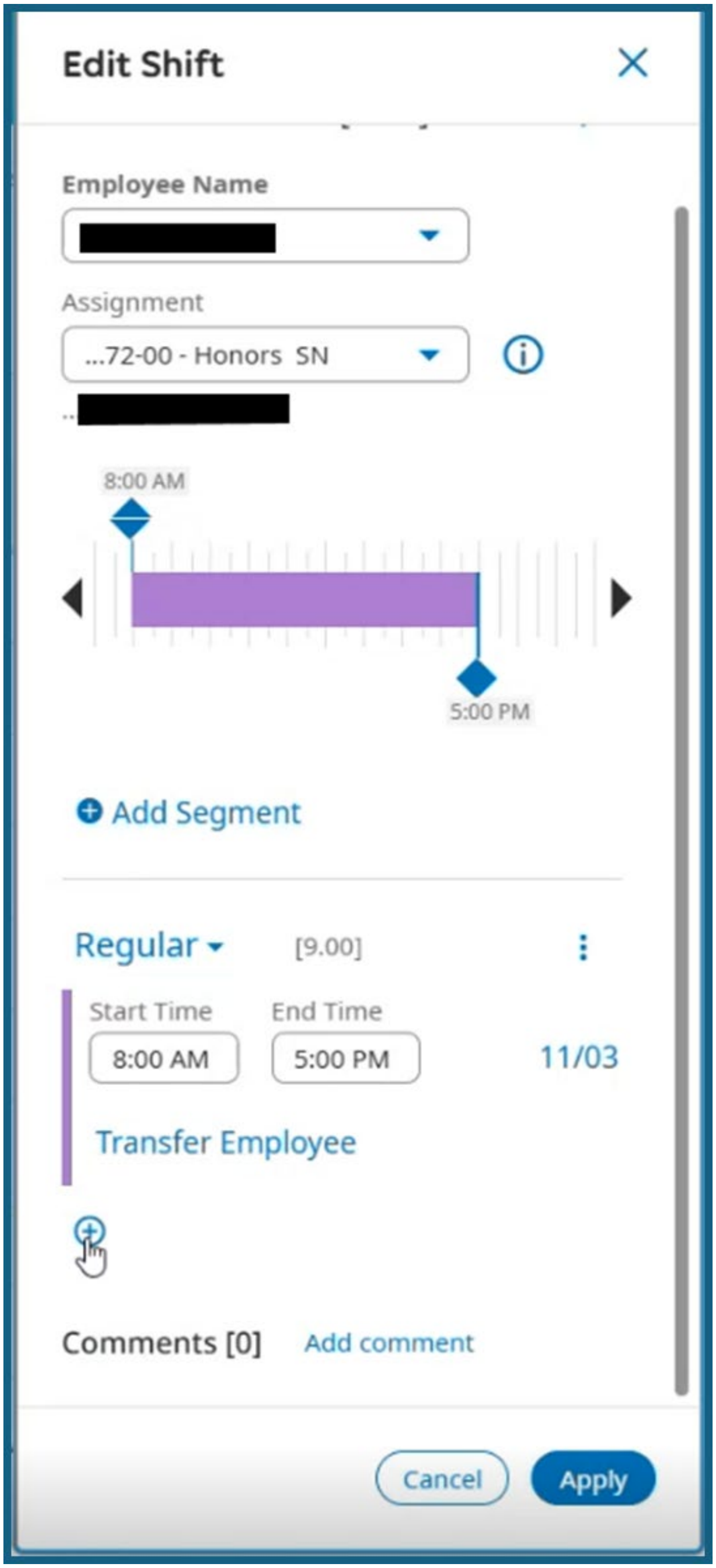
Purpose

Schedule specific break times in a schedule.

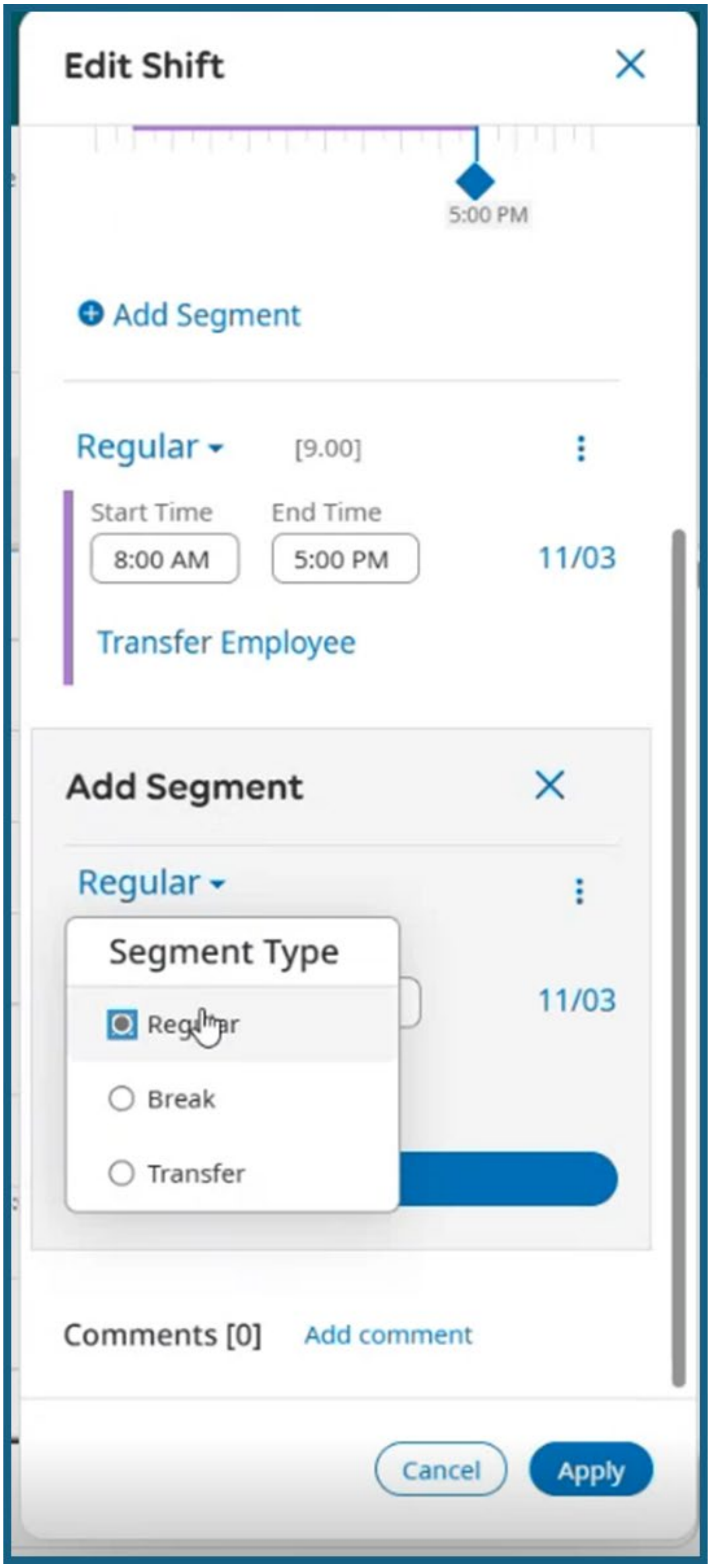
Note: Breaks are different than an Automatic Lunch Deduct Work Rule. A break is just informing the system of the time we expect an employee will punch out/in from a break. An automatic lunch deduction means the employee will not punch in/out for their breaks, and the system will just deduct 30 or 60 minutes from their total worked hours for the day.

Steps:

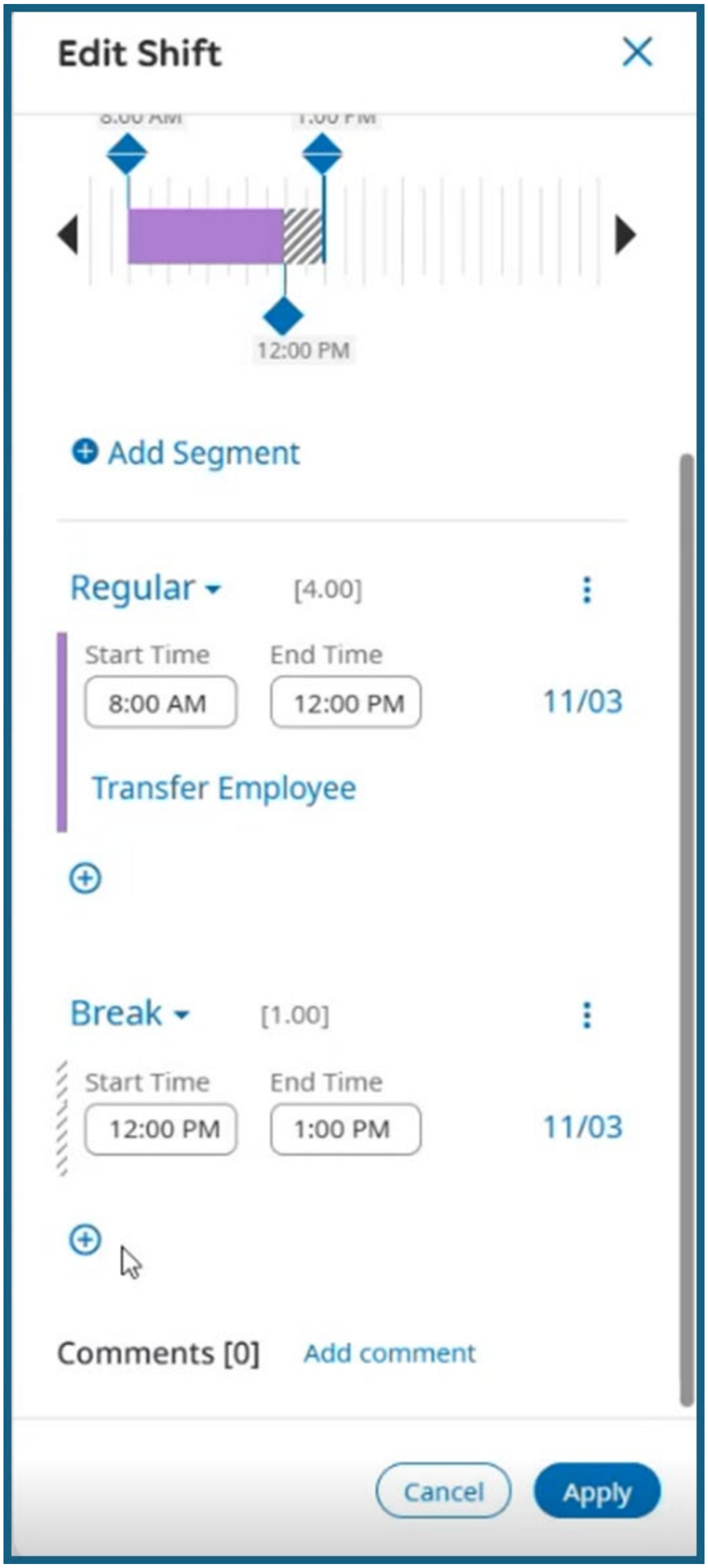
1. Right-click shift → Edit.
2. Click + Add Segment.



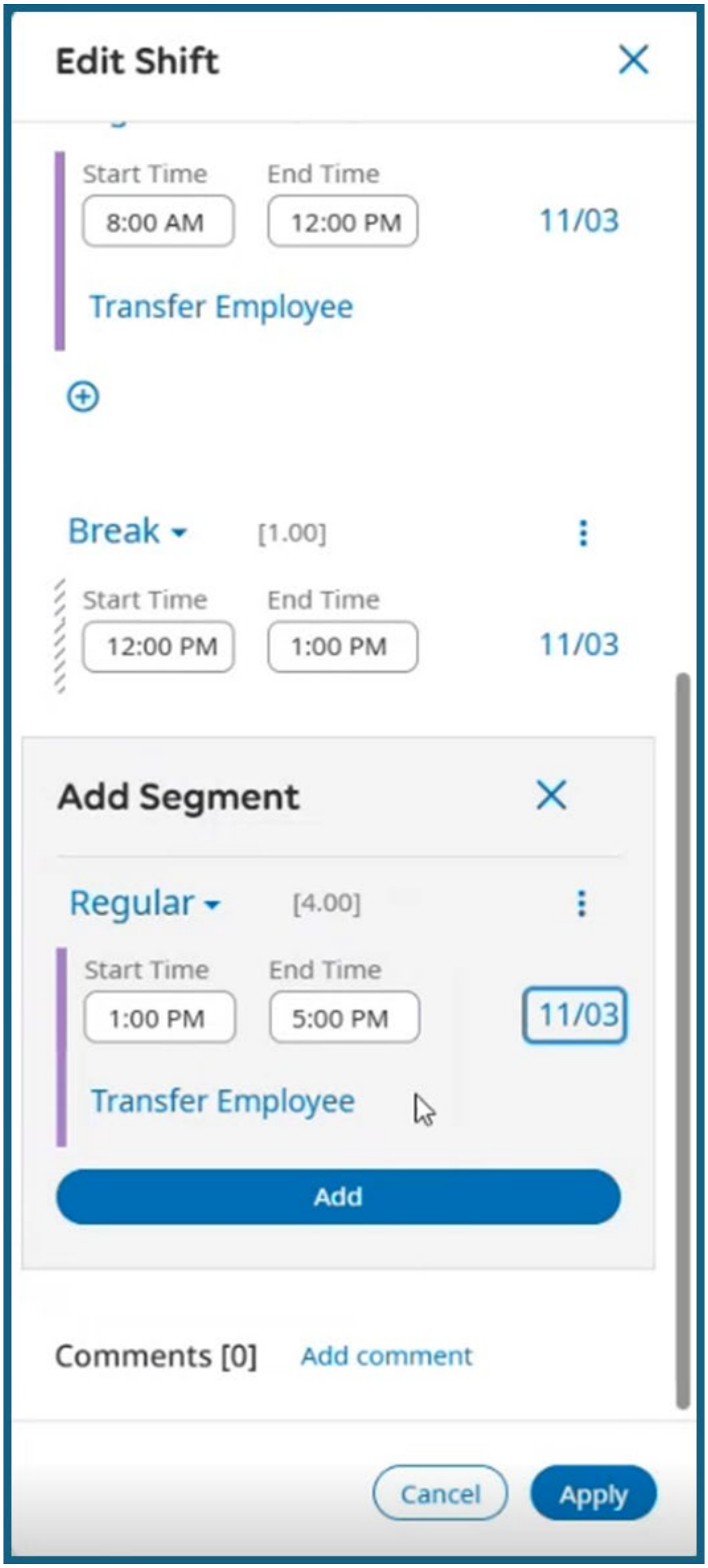
3. Select the drop-down button that says “regular” and change segment type to Break.



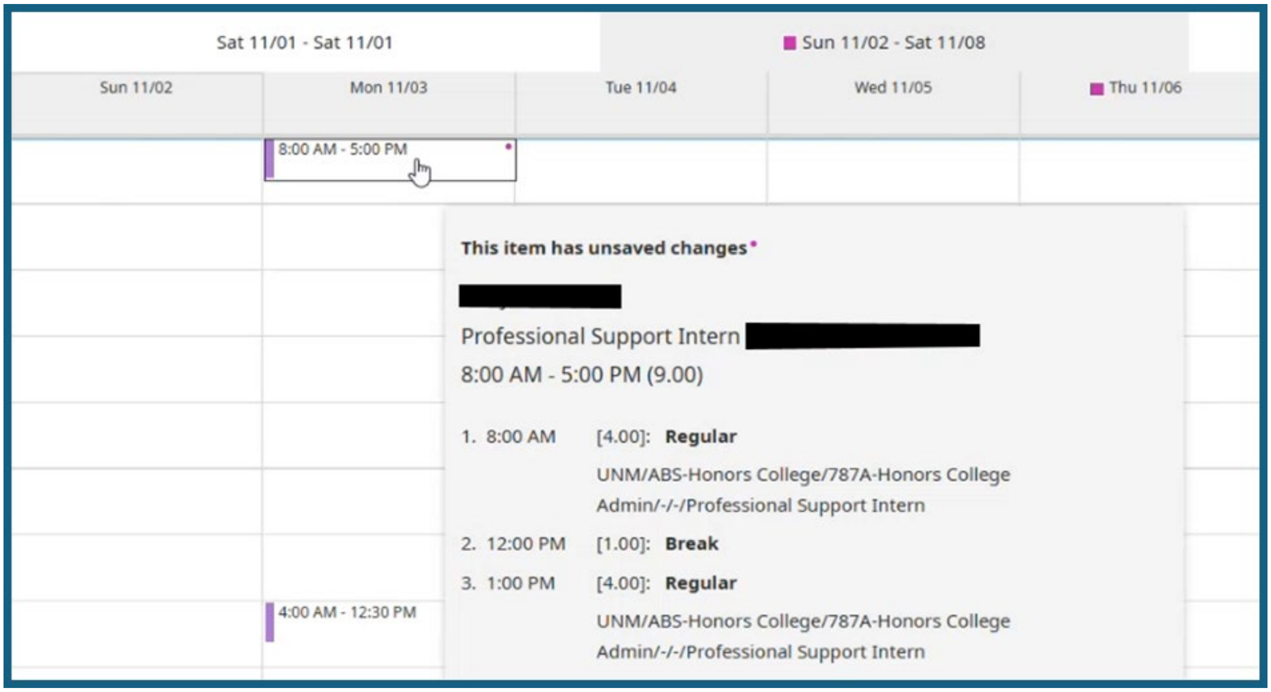
4. Enter break start and end time (e.g., 12:00 PM–1:00 PM). Note: You may also need to change the start/end time to correspond to the break you are adding.



5. Add the next segment for remaining work hours.



6. Apply and save.
    a. You can hover over the shift in the schedule to see the breakdown of the regular time and break time added.



Job Aid: Adding Index Transfers

Purpose

Assign a labor category (index) to scheduled shifts in advance. This is especially useful when multiple employees' work needs to be charged to a different index.

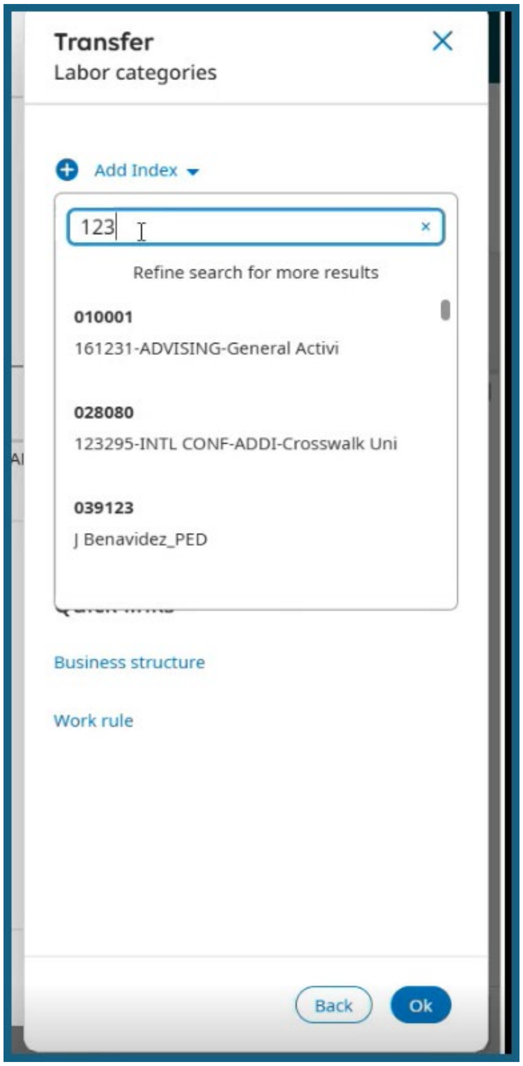
Why It Matters:
If you don't assign the index during scheduling before an employee punches in/out, you will need to:

- Manually change the index on each timestamp for every affected day and employee, or
- Submit a labor redistribution in Banner after payroll runs.

Tip: Assigning the index upfront saves time and prevents extra steps later.

Steps:

1. Right-click shift → Edit.
2. Under Transfer, select Labor Category.
   a. Note: if you already have a work rule transfer applied to that time, you can select the drop down and click "more" to add another transfer into the labor category.
3. Choose add index→ type in your index number→ and apply.



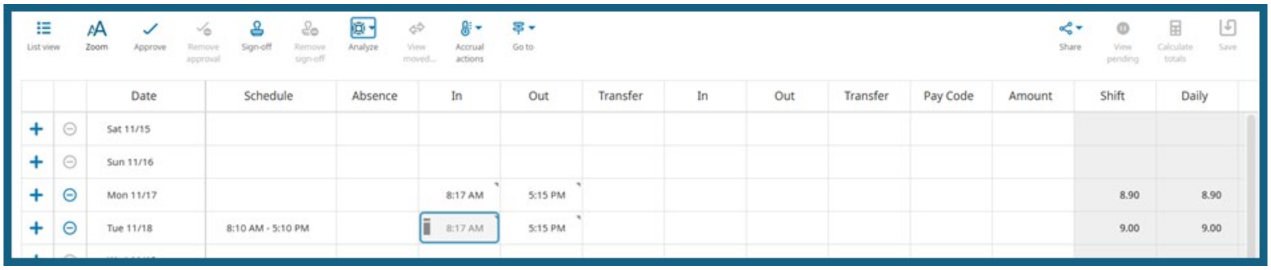
4. For recurring index transfers, add in Schedule Pattern.

Job Aid: Rounding Rules

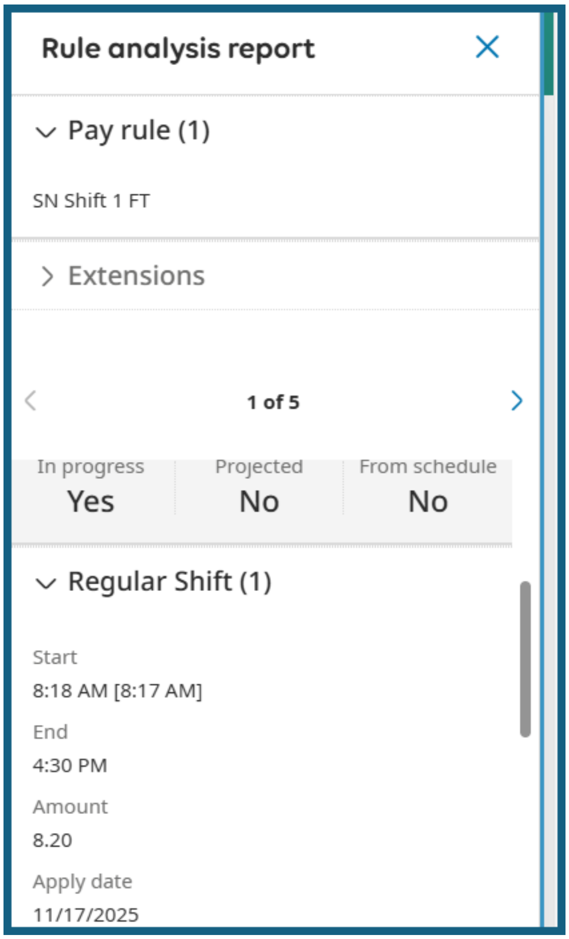
Purpose

Understand rounding differences between punches and manual entries.

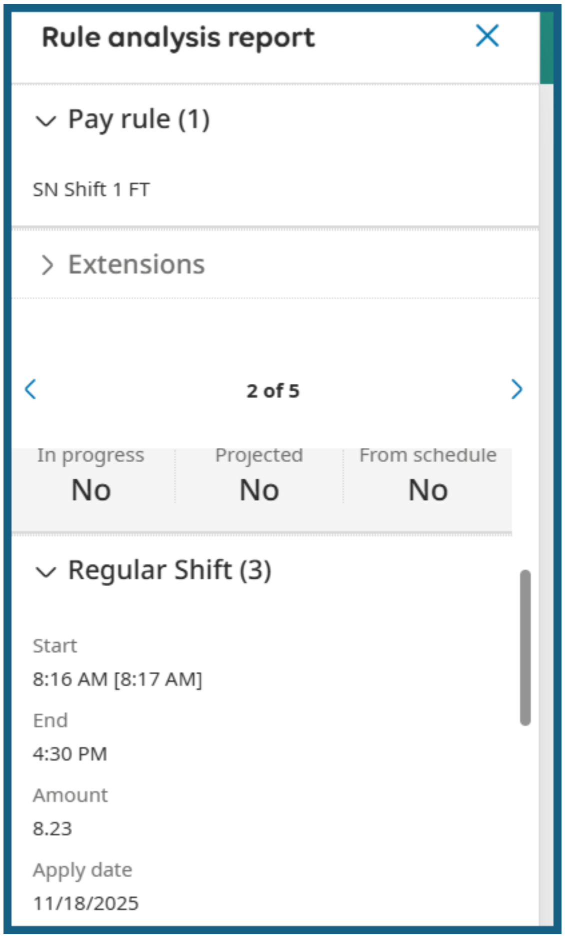
Example: a person has a day with a schedule input and one without.



- **Punches without a schedule**: Rounding is based on a traditional clock with **12 at the top**.



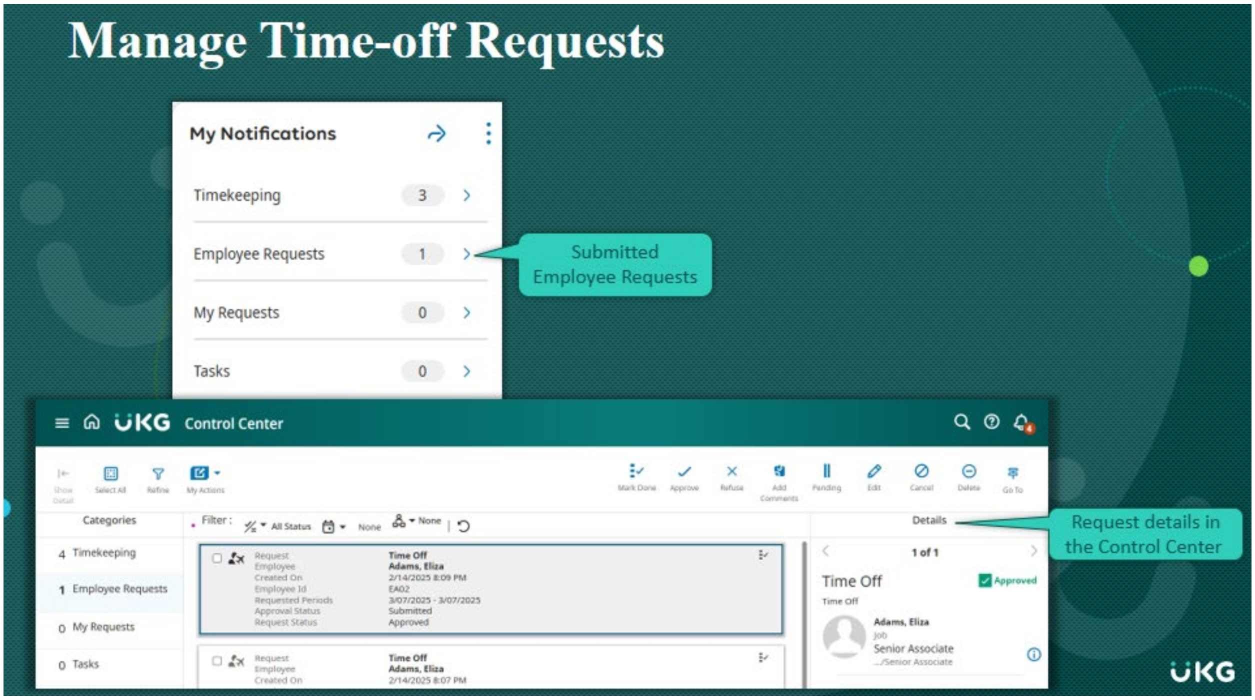
- **Punches with a schedule**: Rounded based on **schedule start time**. The system will round to the nearest tenth of an hour based on the **schedule start time**.



Job Aid: Approving Time-Off Requests from the Control Center

Purpose

Managers can quickly review and approve employee time-off requests directly from the Control Center.



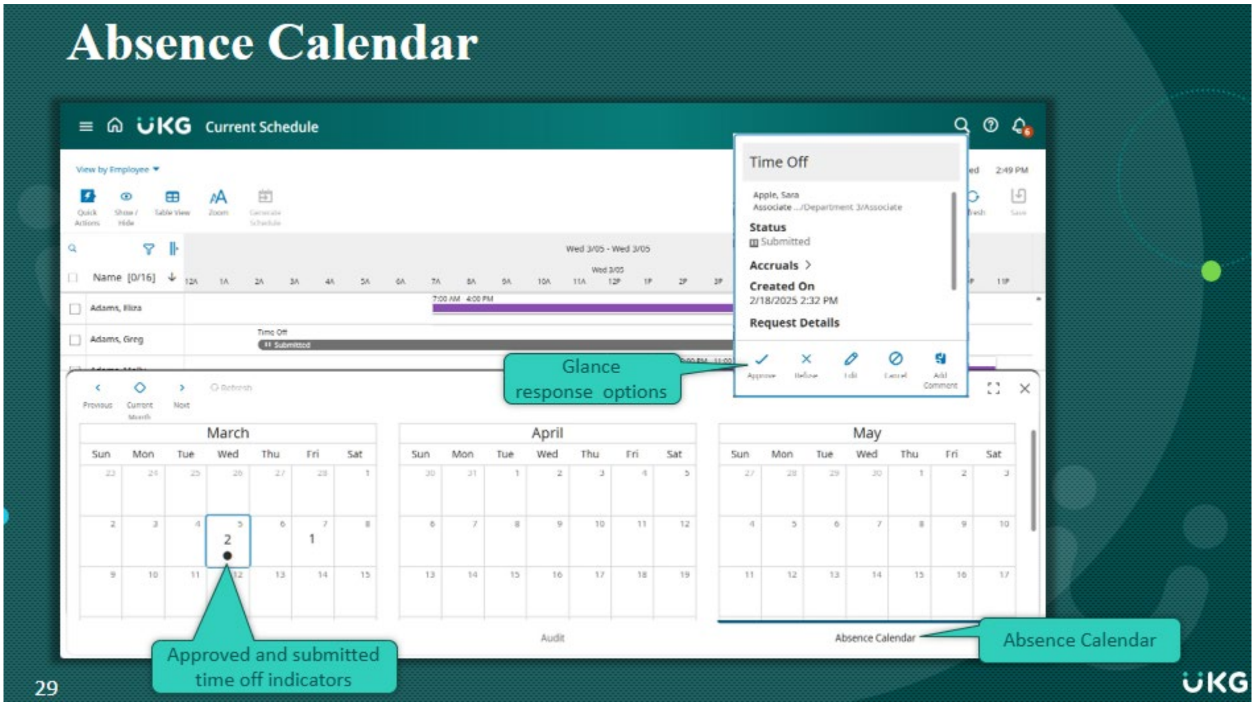
Steps to Approve Time-Off Requests

1. **Access the Control Center**
   a. From the **Home page**, select the **My Notifications** tile and click **Employee Requests**.
   b. OR click the **Notifications (bell)** icon and select the **Time Off** notification.
2. **Review Details**
   a. Check **Accruals** and other relevant information in the **Details** pane.
3. **Take Action**
   a. From the menu at the top, select **Approve** (or other available actions such as Refuse).

Job Aid: Approving Time-Off Requests from the Absence Calendar

Purpose

Managers can approve time-off requests directly from the **Absence Calendar** in the schedule view. This calendar shows how many employees have approved or submitted time off for a specific date, helping managers make informed decisions.



Steps to Approve Time-Off Requests

1. **Access the Absence Calendar**
   a. From the **Schedule**, select the **Absence Calendar** tab.
2. **Activate Approve Action**
   a. Click the **Approve** action to enable approval mode.
3. **Select the Time-Off Request**
   a. Choose the request you want to approve from the schedule.
4. **Deactivate Approve Action**
   a. Turn off the **Approve** action after completing the approval.
5. **Save Changes**
   a. Click **Save** to finalize the approval.

Job Aid: Approving Pending Leave Requests as an Org Manager

Option 1: Use the Time Off Request Info Dataview

1. **Navigate to:**
2. **Time Off Request Info Dataview**

a. This displays all outstanding requests in **Pending** or **Submitted** status.

2. **Select Employees:**
    a. Check the box next to one or multiple employees.
3. **Access Schedule:**
    a. Right-click and choose:
        More Actions → Go To → Schedule
4. **Approve/Deny Request:**
    a. In the schedule view, locate the specific day(s) with the time-off request.
    b. Take action (**Approve** or **Deny**) directly from the schedule.

Option 2: Use the Schedule View

1. **Navigate to Schedule**
2. **Locate Absence Calendar:**
    a. Scroll to the **Absence Calendar** at the bottom of the screen.
3. **Identify Pending Requests:**
    a. Look for dates with a **number** or **black dot** (indicates pending requests).
4. **Approve/Deny Request:**
    a. Click the specific date to view details and take action (**Approve** or **Deny**).

Job Aid: Managing Timecards from the Home Page

Purpose

The **Manage Timecard** tile provides a snapshot of key timecard information, including exceptions that require action. Managers can quickly review, fix issues, and approve timecards from this tile.

What You Can Do from the Manage Timecard Tile

- **Change Displayed Data**

  Example: Use the **Pay Period** drop-down to select which pay period to view.

- **Fix Urgent Exceptions**

  Example: Click **Must Fix** to navigate directly to exceptions requiring attention such as a missing punch out.

- **Review Punches**

  Example: Use the **Need Review** category to check and acknowledge punches that do not align with the schedule such as a late punch in.

- **Approve Timecards**

  Example: Access and approve timecards that have no exceptions.

Steps

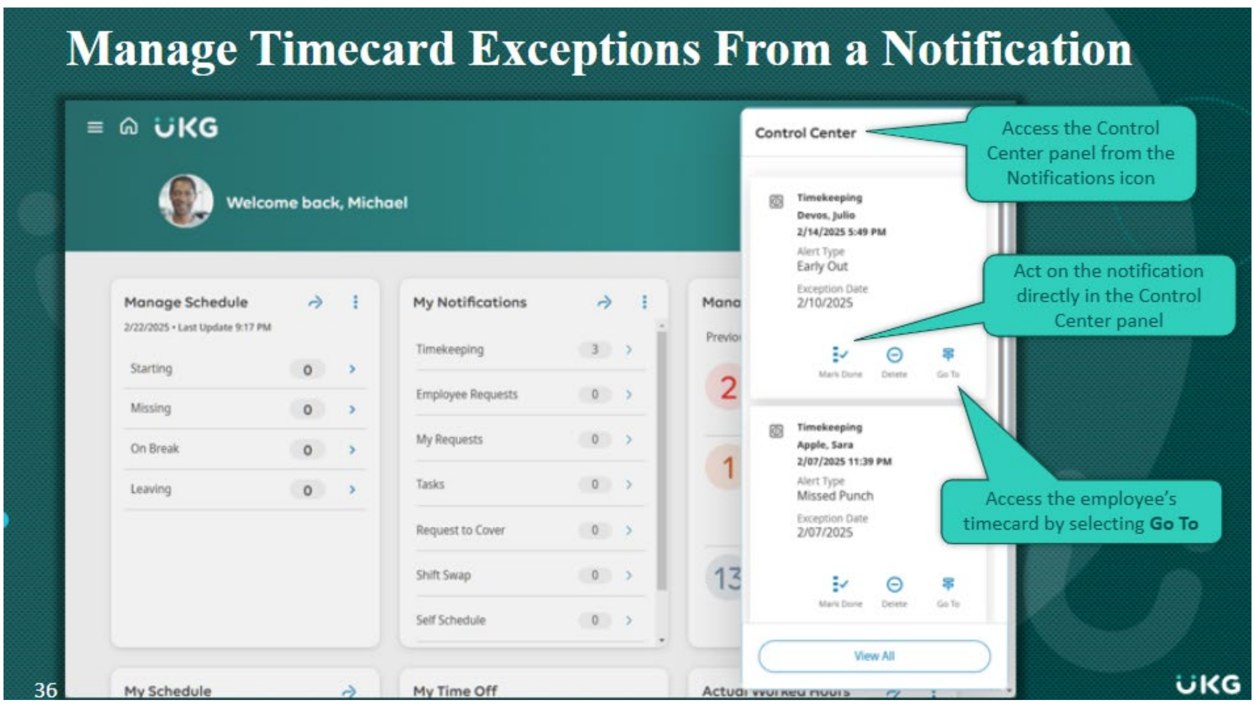
1. Go to the **Home Page** and locate the **Manage Timecard** tile.

2. Use the **Pay Period** drop-down to select the desired pay period.
3. Review categories:
    a. **Must Fix** for urgent exceptions.
    b. **Need Review** for punches requiring acknowledgment.
4. Select **Approve** for timecards without exceptions.
5. Confirm changes as needed.

Job Aid: Managing Timecard Exceptions from the Control Center

Purpose

The **Notifications** icon alerts managers to timecard exceptions. From the **Control Center** panel, you can review and resolve exceptions quickly.



What You Can Do

- **Mark Done**

  Example: If an Early Out exception does not require changes, select **Mark Done** to clear it.

- **Go To Employee's Timecard**

Example: Click **Go To** on the exception tile to navigate directly to the employee's timecard for review and resolution.

- **Delete Notification**

  Example: If an exception was triggered by an error that has already been corrected, select **Delete** to permanently remove the notification (history will not be retained).

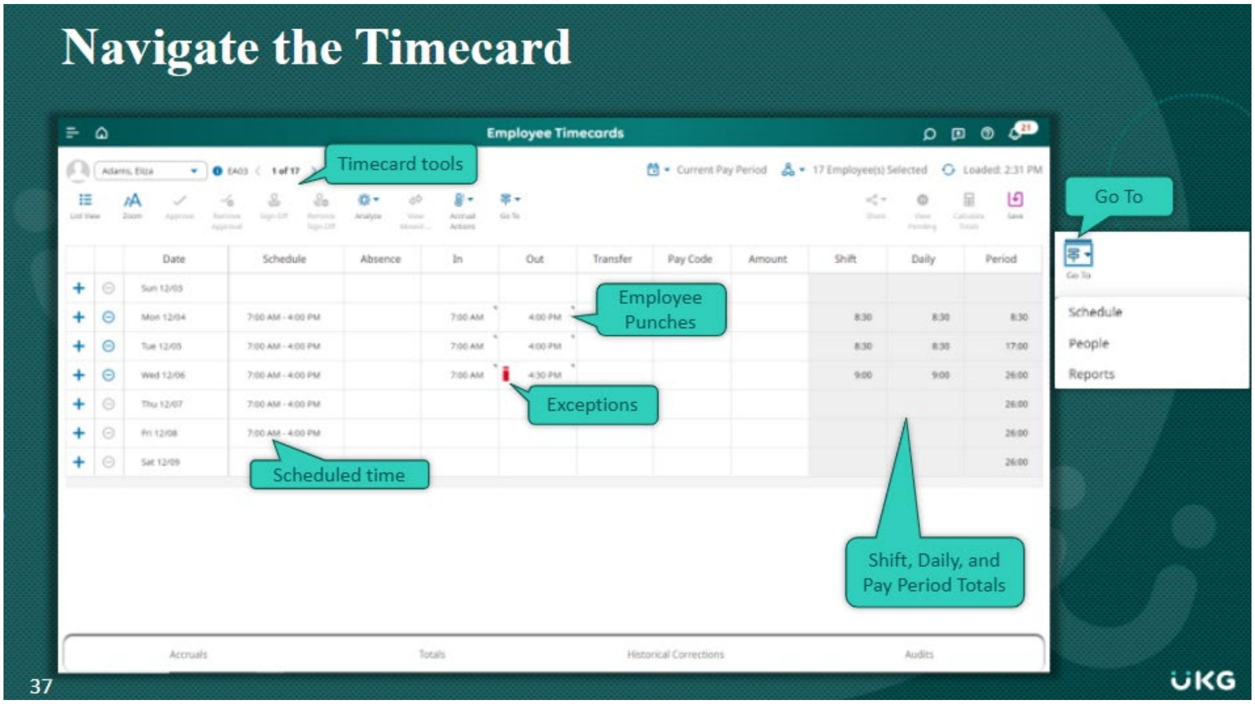
Steps

1. Click the **Notifications (bell)** icon to open the **Control Center** panel.
2. Review the list of **Timekeeping exceptions**.
3. Choose an action:
   a. **Mark Done** to acknowledge without changes.
   b. **Go To** to open the employee's timecard.
   c. **Delete** to remove the notification permanently.
4. Confirm changes as needed.

Job Aid: Viewing and Using Employee Timecards

Purpose

The **Employee Timecards** page provides detailed timecard information for employees selected from the **Employee Summary** page or the **Manage Timecards** tile.



What the Timecard Displays

- **Scheduled Time** *(if you input schedules for your employees)*
- **Punch In and Punch Out Times**
- **Punch Exceptions**
  - Deviations from scheduled time
  - *Note:* Exceptions do not display if scheduling is not used
- **Shift, Daily, and Pay Period Totals**

Additional Details via Timecard Tabs

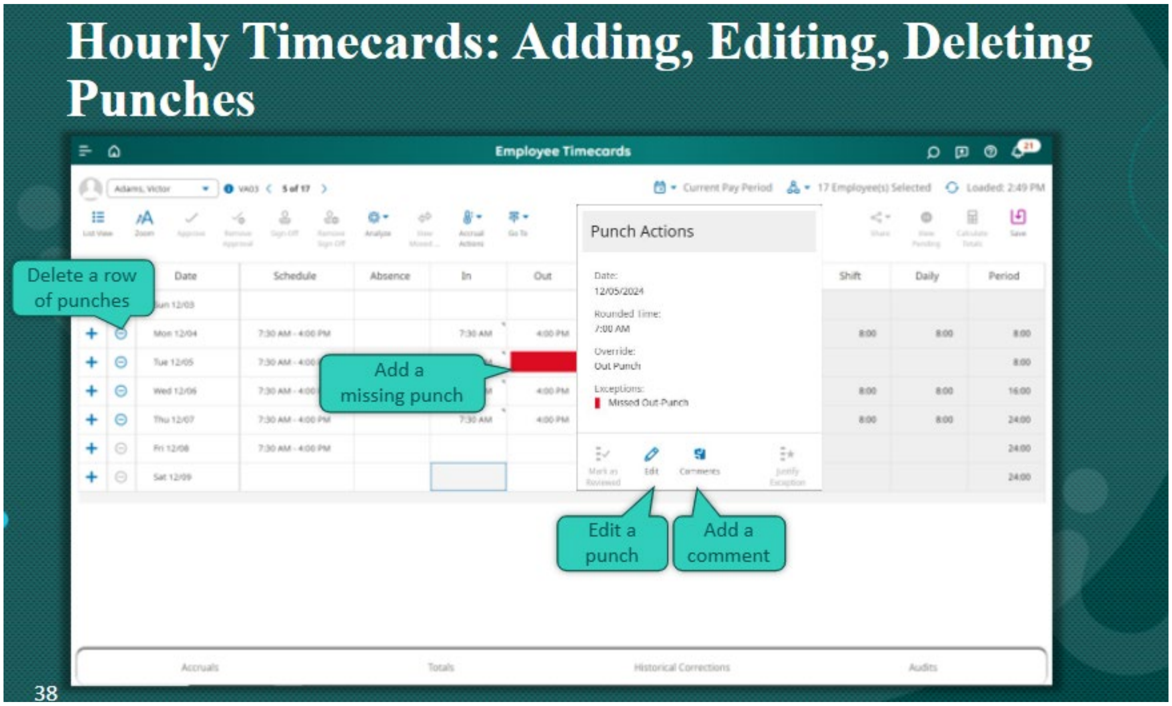
Located at the bottom of the timecard:

- **Accruals Balances**
- **Timecard Totals** for the selected timeframe
- **Timecard Audits**

Job Aid: Managing Punches in Employee Timecards

Purpose

Managers can add, edit, or delete punches in employee timecards to ensure accurate time tracking.



What You Can Do

- **Add a Missing Punch**

  Example: Enter a punch when an employee forgets to clock out.

- **Edit an Existing Punch**

  Example: Adjust an out punch if an employee works an extra hour.

  Note: A black triangle will appear in the cell to indicate an edit.

- **Delete a Row of Data**

  Example: Remove hours that were erroneously scheduled on a non-working day.

- **Delete a Single Punch**

Example: Remove an incorrect punch (e.g., an accidental punch out).

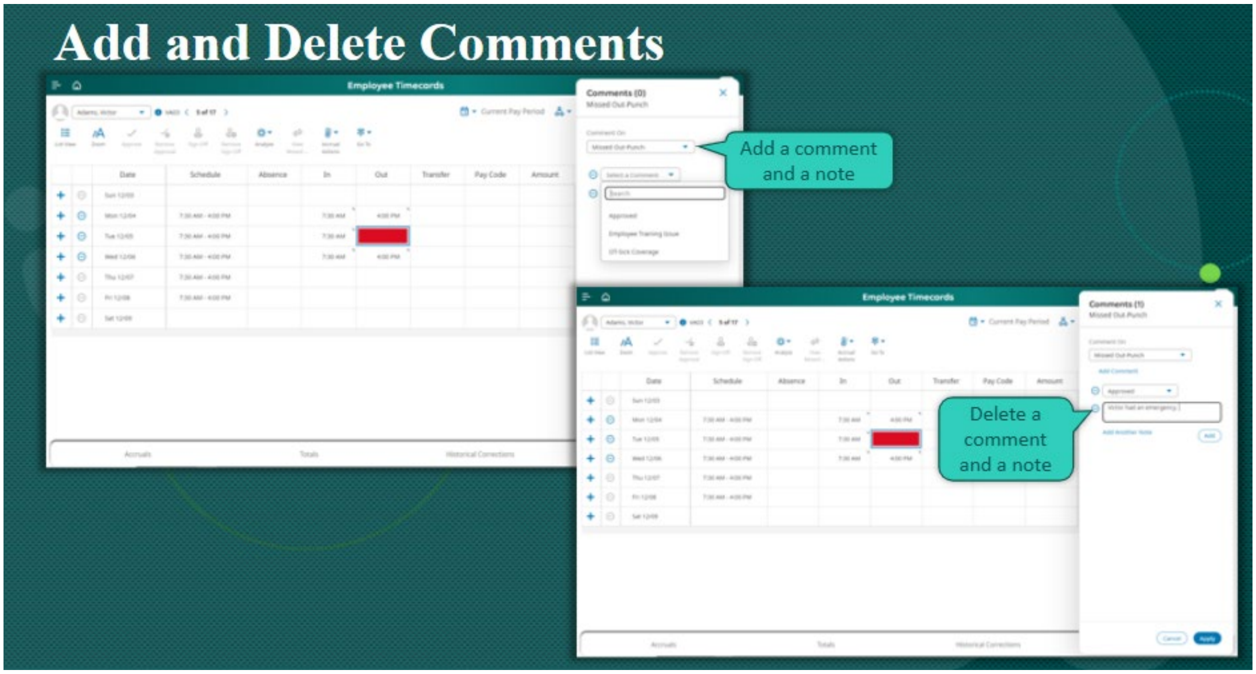
Steps

1. **Add a Missing Punch**
    a. Select the applicable cell.
    b. Enter the correct time.
2. **Edit an Existing Punch**
    a. Select the cell.
    b. Make the necessary edits.
    c. Confirm changes (black triangle indicates edit).
3. **Delete a Row**
    a. Click the **Delete** icon for the row.
4. **Delete a Single Punch**
    a. Select the punch.
    b. Press **Delete** on your keyboard.
5. **Save Changes**
    a. Click **Save** to finalize updates.

Job Aid: Adding Punches and Comments to a Timecard

Purpose

Adding comments when editing a timecard ensures proper record-keeping. Comments can also be added to exceptions and punches, and they can be edited or deleted later.



Steps to Add Punches and Comments

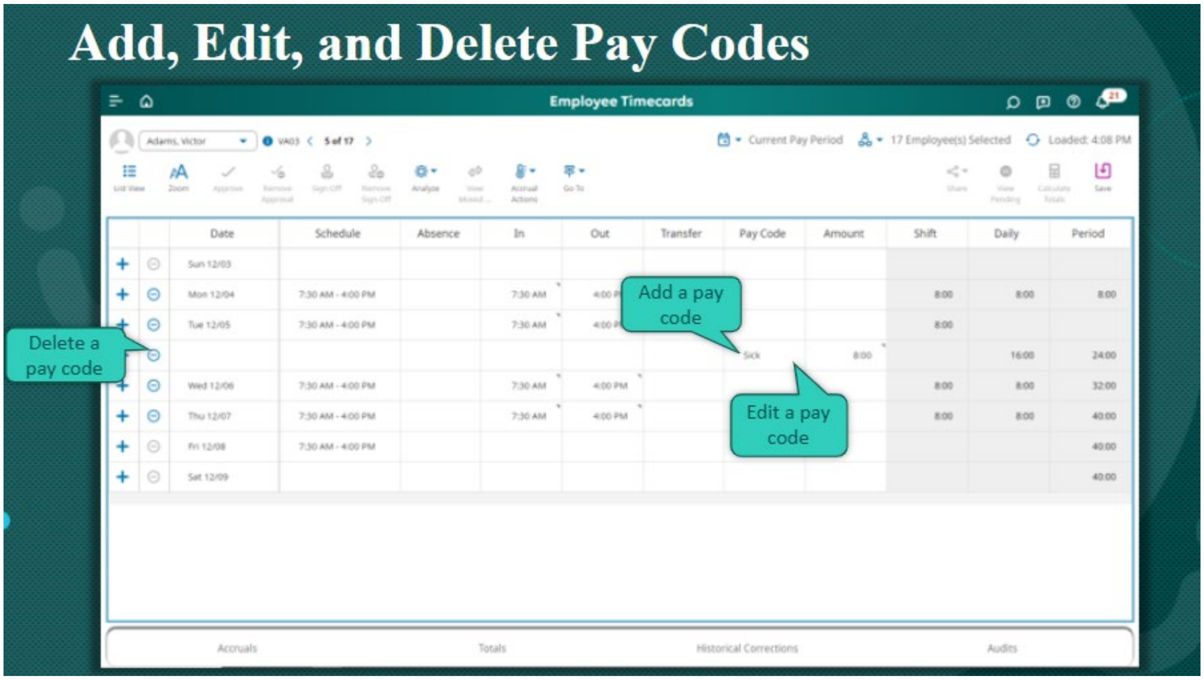
1. **Access the Employee's Timecard**
    a. Navigate to the timecard for the correct pay period.
2. **Add Missing Punch (if needed)**
    a. Enter the missing punch in the appropriate cell.
3. **Add a Comment**
    a. Select the punch and **right-click**.
    b. Choose **Comments**.
    c. Select a comment from the predefined list explaining the edit.
    d. *(Optional)* Enter a custom note for additional details.
    e. Click **Apply**.
4. **Save Changes**
    a. Select **Save** to confirm updates.
5. **Clear Notification**
    a. In the Control Center, select **Mark Done** for the related notification.

Job Aid: Adding and Managing Pay Codes in Timecards

Purpose

Pay codes allow managers to record different pay types for worked or non-worked hours (e.g., Sick, Annual, FMLA, Comp Time Earned, Callback, etc).

Important: Pay codes cannot be added to a row with punches. If both are needed on the same day, add a new row for the pay code.



What You Can Do

- **Add a Pay Code**

  Example: Apply a Sick pay code when an employee is absent due to illness.

- **Edit an Existing Pay Code**

  Example: Update the pay code using the drop-down list.

- **Delete a Pay Code Row**

  Example: Remove a row by selecting the **Delete** icon.

Steps to Add a Pay Code to Excuse an Absence

1. **View Accrual Balance**
   a. Check the employee's available accruals.
2. **Add a Row (if needed)**
   a. Insert a new row for the pay code if punches exist on the same day.

3. **Select Pay Code**
    a. Click the pay code cell.
    b. Choose the appropriate pay code from the list.
4. **Enter Amount**
    a. Specify the number of hours or duration.
5. **Save Changes**
    a. Click **Save**.
6. **Review Totals**
    a. Confirm the employee's totals for the time period.

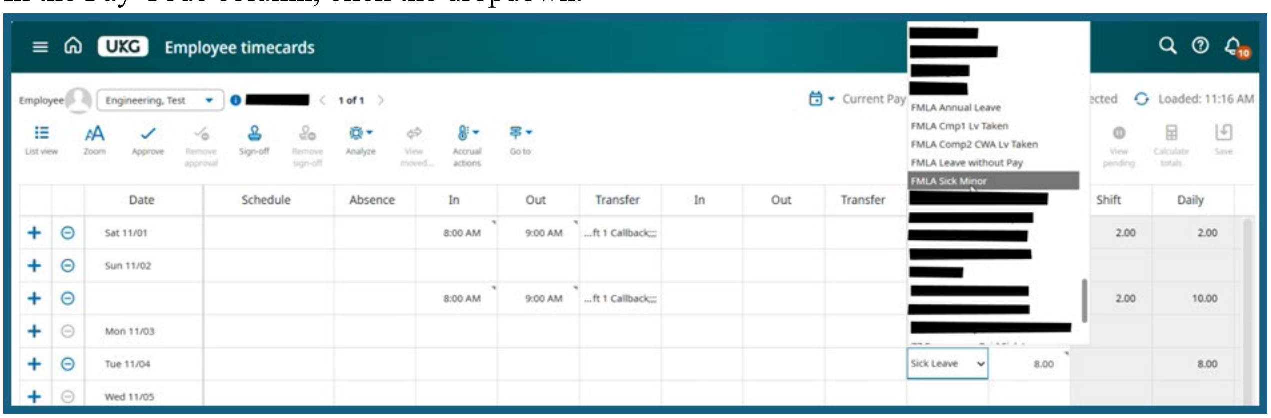
Job Aid: Entering FMLA on Timesheets

Purpose

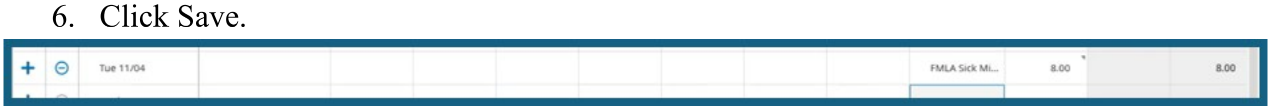
Adjust pay codes for FMLA leave.

Steps

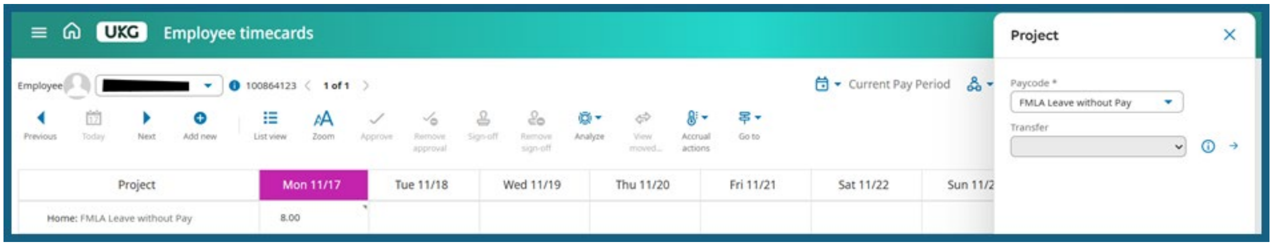
1. Navigate to the employee's Timecard.
2. Locate the date(s) where sick/annual leave was taken.
3. In the Pay Code column, click the dropdown.



4. Select the appropriate FMLA code:
    a. FMLA Sick Minor (if originally sick leave)
    b. FMLA Annual (if originally annual leave)
    c. FMLA Leave without pay (if no accrued leave is available)
5. Enter the number of hours (e.g., 8.00).
6. Click Save.



Note: For exempt staff you will click on “Add new” at the top of the timesheet and select the relevant pay code. Then you can enter the number of hours on the relevant date(s) and click save.



Job Aid: Entering Paid Parental Leave (PPL)

Purpose

Add PPL pay codes and hours if the employee has not submitted a leave request.

Steps

1. Ensure the employee has enough PPL balance.
2. Navigate to the employee’s Timecard.
3. Select the date(s) for PPL.
4. In the Pay Code dropdown, choose Paid Parental Leave Taken.

4. Enter the number of hours.
5. Click Save.

Job Aid: How and When to Use Other Paid Leave

Purpose

To accurately apply the **Other Paid Leave** pay code for approved situations under **University Administrative Policy (UAP) 3415: Leave with Pay**.

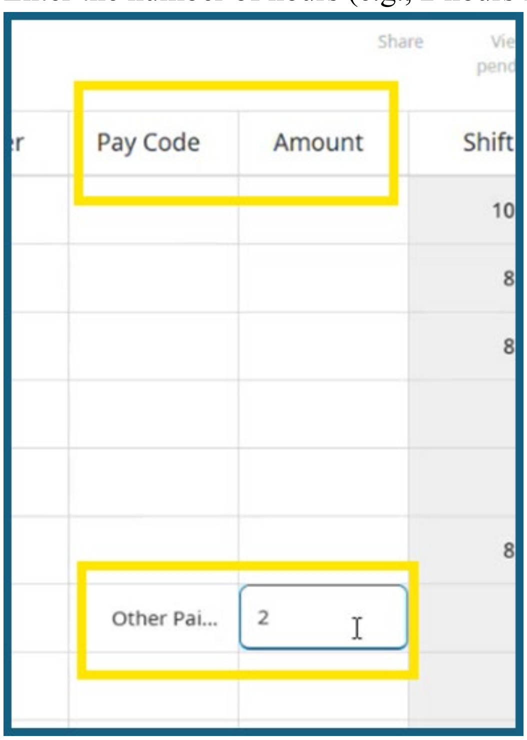
When to Use:

Apply **Other Paid Leave** only for the specific purposes authorized by UAP 3415, including:

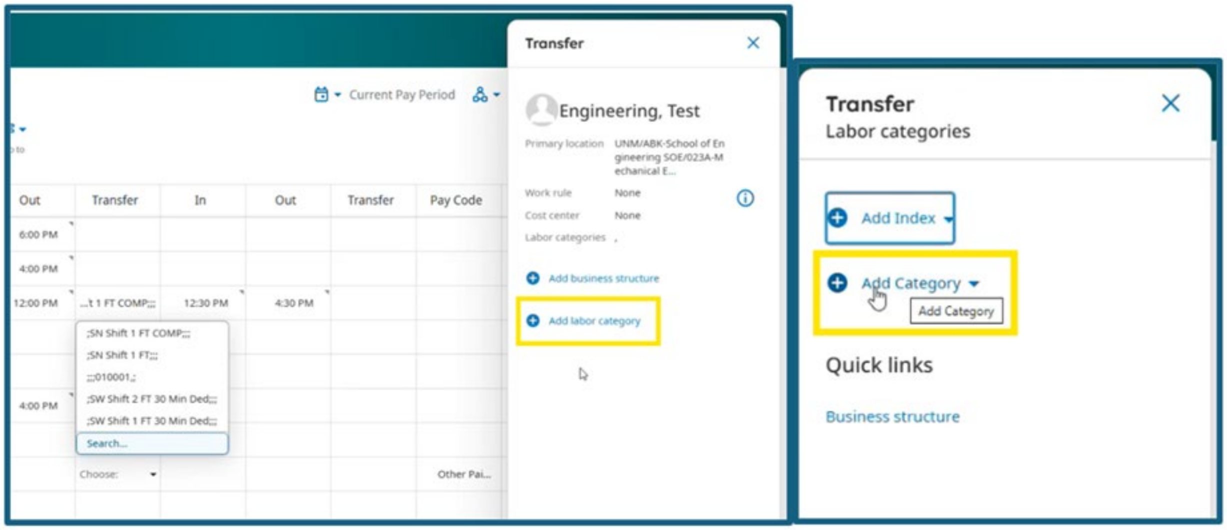
- **University or Branch Closure** – When the University is officially closed by the President (e.g., inclement weather, national emergency).
- **Education Leave** – Approved time for professional development or training.
- **Time Off for Interviews** – Reasonable time off for University job interviews during regular work hours.
- **Marriage Leave** – When the employee, their child, or parent is getting married on a scheduled workday.
- **Bereavement Leave** – Up to five working days for death in the immediate family or pregnancy loss.
- **Voting Time** – Up to two hours to vote in a governmental election.
- **Jury and Court Duty** – Time spent on jury duty or as a witness (not as plaintiff or defendant).
- **Paid Administrative Leave** – Granted for urgent or serious matters with HR and executive approval.
- **Community Engagement Leave** – Approved volunteer or civic engagement activities.
- **Staff Council** – Participation in Staff Council meetings or activities.
- **Other** – Any additional approved leave type under UAP 3415.

Steps

- Use **Pay Code** column to select "Other Paid Leave" from drop down.
- Enter the number of hours (e.g., 2 hours for a delay) in **the Amount** column. Click **Save**.



- Use **Transfer** column, select drop down option and select **Add Labor Category,** then **Add Category**. Select the appropriate category for the transfer (e.g., Closure/Delay, Bereavement).



- Click **Save**. This categorization improves reporting.

Other Paid Leave: Inclement Weather

- Use the same process as above.
- Select "Closure/Delay" under Labor Category.
- Only required for **non-exempt** employees.
- Reference **UAP 3415: Leave with Pay** policy for guidance.

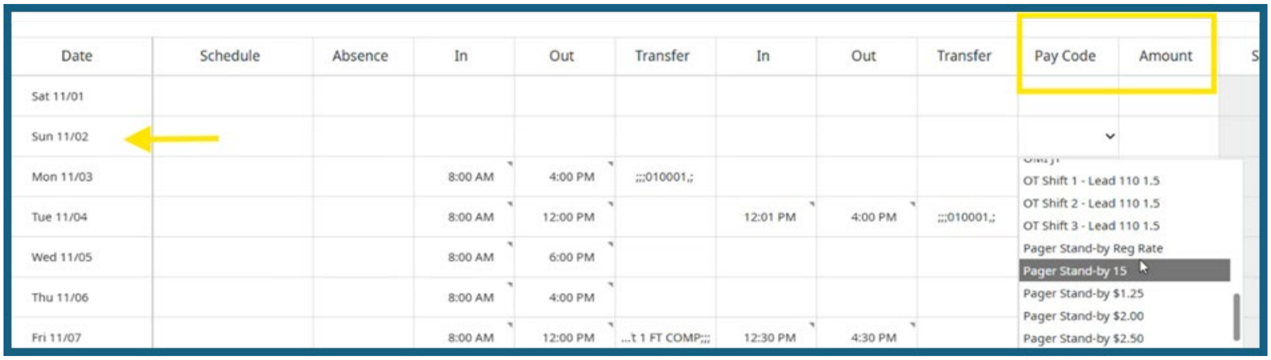
Job Aid: Standby Pay and Callback Pay

Purpose

Correctly record compensation for employees who are required to remain available for work outside normal hours (standby) or who are called back to work after completing their scheduled shift (callback). Proper coding ensures employees receive the correct pay for standby status and callback work, including overtime when applicable.

Standby Pay:

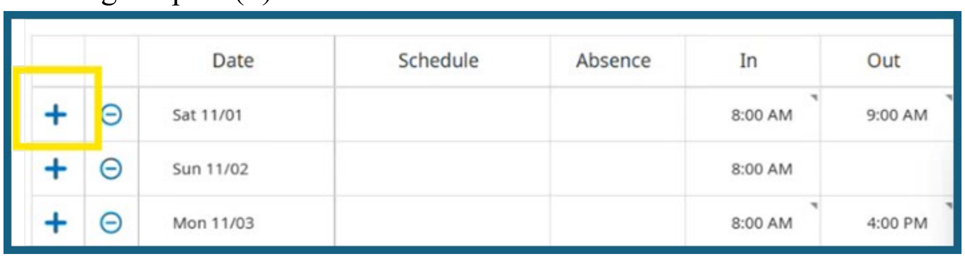
- Within an employee's timecard, on the day Standby occurs, use **Pay Code** column to select appropriate pay code from dropdown menu (e.g., Pager Standby $2.00).



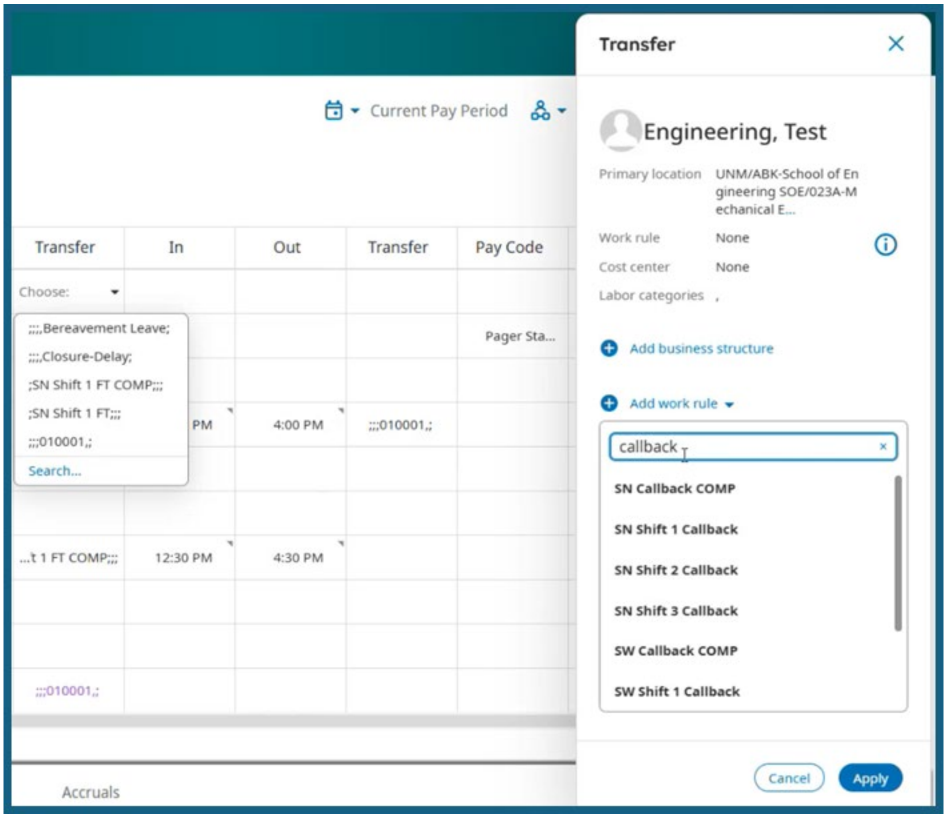
- Enter hours in **the Amount** column (e.g., 8 hours).
- Click **Save**.

Callback Pay:

- In employee's timecard, if hours are already entered for that day add a new row by selecting the plus (+) icon at the left side of the **Date** column.



- Enter callback time worked (e.g., 8:00 AM–9:00 AM).
- Use **Transfer** column, select search and **Add Work Rule** then select the appropriate **Work Rule** (e.g., SN Callback).



- Click **Save**.

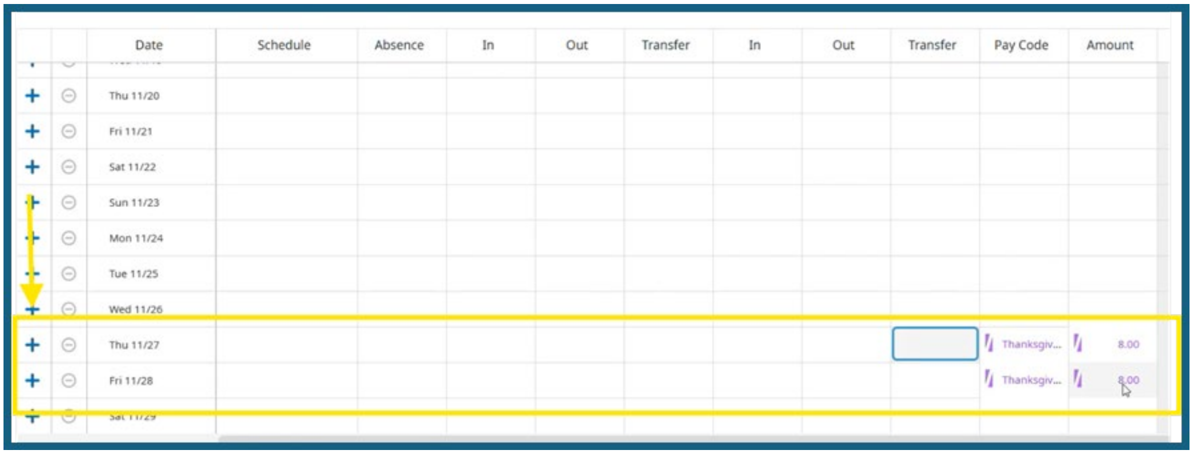
Job Aid: Holiday Pay – Part-Time & Flex Schedules

Purpose

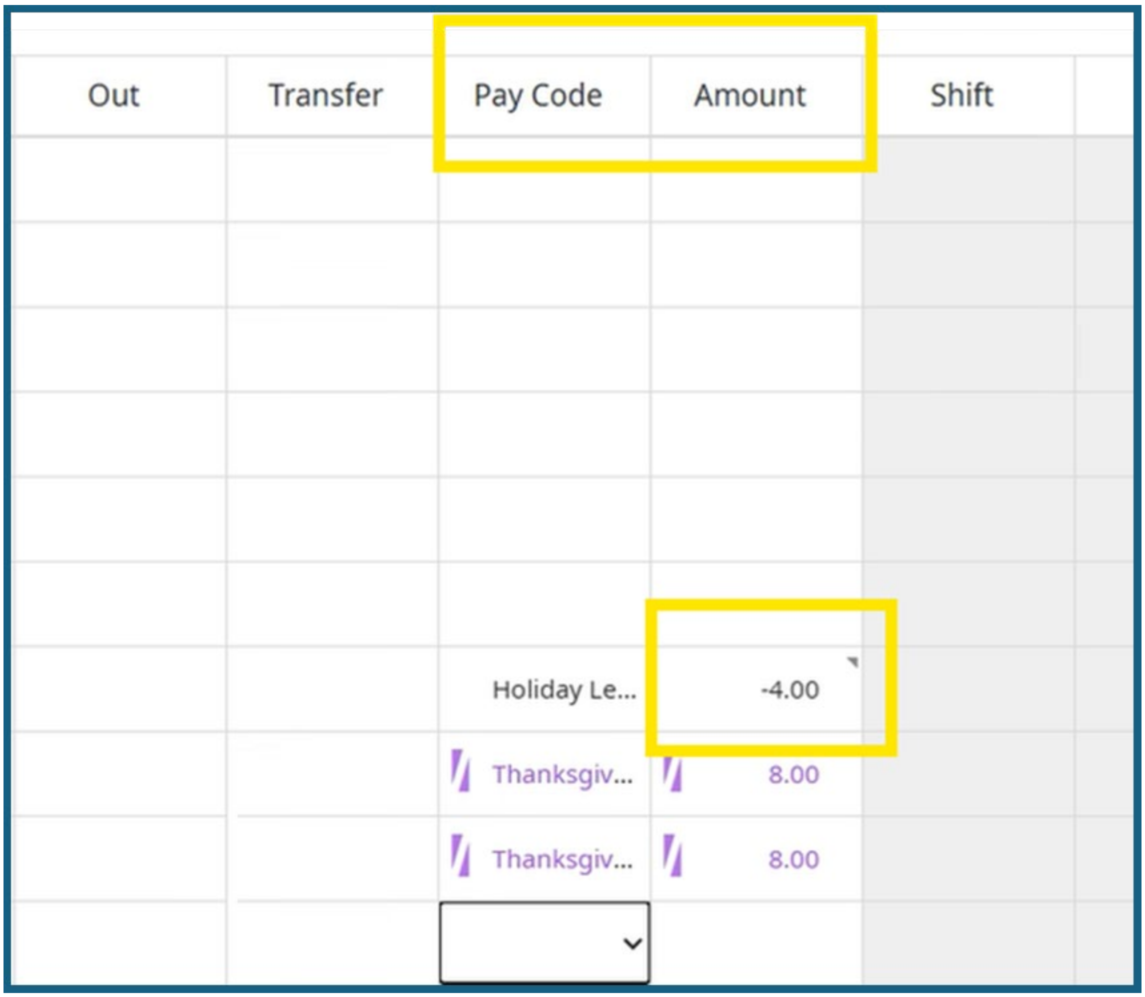
The system auto-applies 8 Holiday Pay hours for leave-eligible employees. Departments should adjust worked hours to avoid exceeding FTE. For eligible part-time employees (0.50+ FTE) earned holiday pay must be adjusted according to the employee's FTE in accordance with UAP 3405: Holidays.

Steps

- For part-time employees, calculate holiday hours:
  FTE x 8 Holiday Hours = Part-time Employee's Holiday Hours Earned
    - e.g., 0.6 FTE × 8 = 4.8 hours
- In the employee's timecard add a row to the day(s) designated as UNM observed holiday by clicking on the plus (+) icon to the left of the **Date**.



- Use the **Pay Code** column to select **Holiday Leave**.
- Use the **Amount** column to add Holiday Hours earned**,** enter amount as a **negative**.



- Click **Save** and repeat as needed.

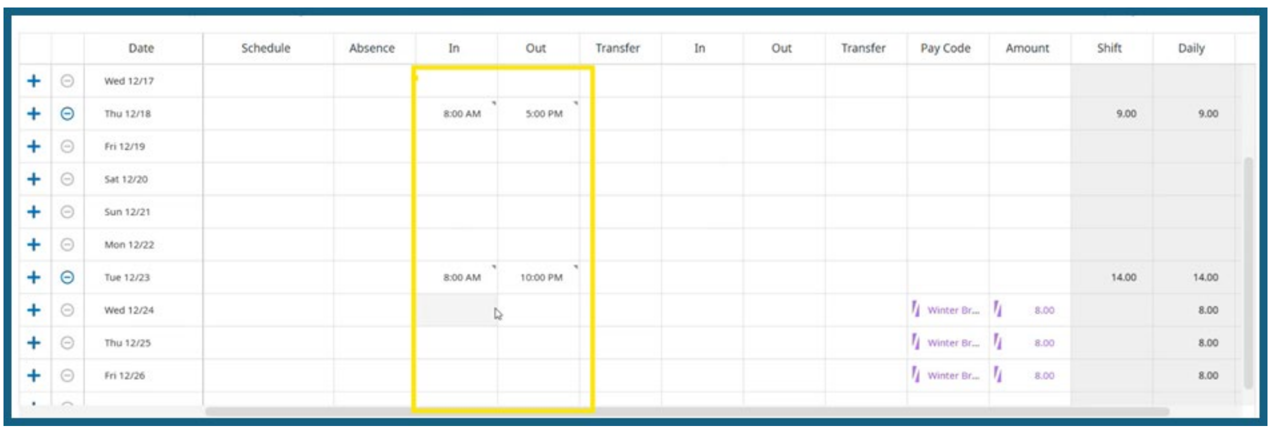
Job Aid: Holiday Pay – Projecting Time During Closure

Purpose

When payroll deadlines occur before an extended holiday closure, departments must enter projected hours in LoboTime to ensure employees receive accurate pay. This process helps minimize discrepancies between estimated and actual worked hours while allowing timely payroll processing.

Steps

- In the employee's timecard, enter projected hours for the closure period, including any anticipated overtime or double shifts.
- If actual hours differ from the projection, submit a Payroll Adjustment Form after the fact to reconcile discrepancies.
    - You can find the payroll adjustment forms here: [Time Entry and Forms :: Payroll Office | The University of New Mexico]
- The system will allow early sign-off during these periods to meet payroll deadlines.

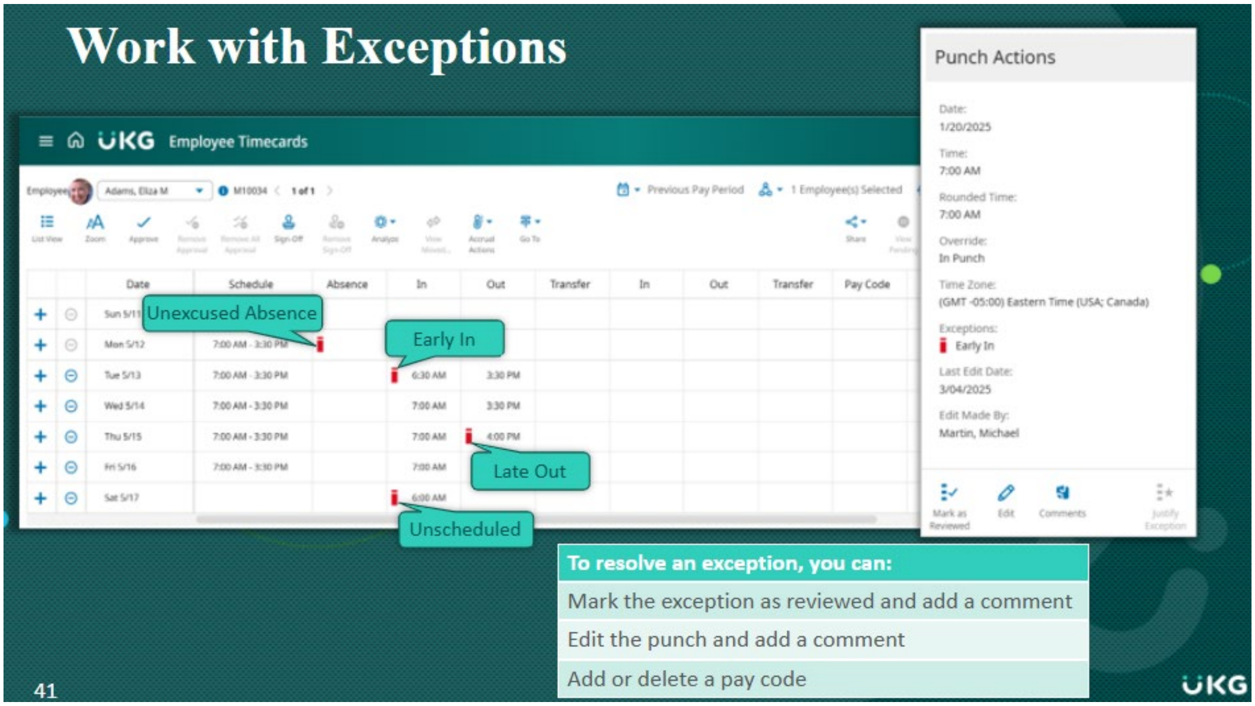


Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	Shift	Daily
Wed 12/17												
Thu 12/18			8:00 AM	5:00 PM							9.00	9.00
Fri 12/19												
Sat 12/20												
Sun 12/21												
Mon 12/22												
Tue 12/23			8:00 AM	10:00 PM							14.00	14.00
Wed 12/24									Winter Br...	8.00		8.00
Thu 12/25									Winter Br...	8.00		8.00
Fri 12/26									Winter Br...	8.00		8.00

Job Aid: Reviewing Exceptions and Adding Comments in Timecards

Purpose

Exceptions occur when an employee's actual worked hours differ from their scheduled hours. For example, a late punch in, or unexcused absence. Managers are responsible for reviewing and resolving these exceptions.



What You Need to Know

- **Examples of Exceptions**
  - Leaving early (e.g., scheduled 7:00 AM–5:00 PM, leaves at 4:30 PM).
  - Missing a punch (e.g., scheduled to work but does not clock in).
- **Visual Indicators**
  - **Red bar or block** in the punch cell indicates an exception.
  - Hover over the cell to see a tooltip with the exception type (e.g., "Late Out," "Missed Punch").

Steps to Review Exceptions and Add Comments

1. **Access the Employee's Timecard**
   a. Navigate to the timecard for the correct pay period.
2. **Review the Exception**
   a. Identify cells with red indicators and hover to view details.
3. **Add a Comment**
   a. Right-click the cell with the exception.
   b. Select **Comments**.
   c. Choose a predefined comment and optionally type a note.
   d. Click **Apply**.
4. **Mark as Reviewed**

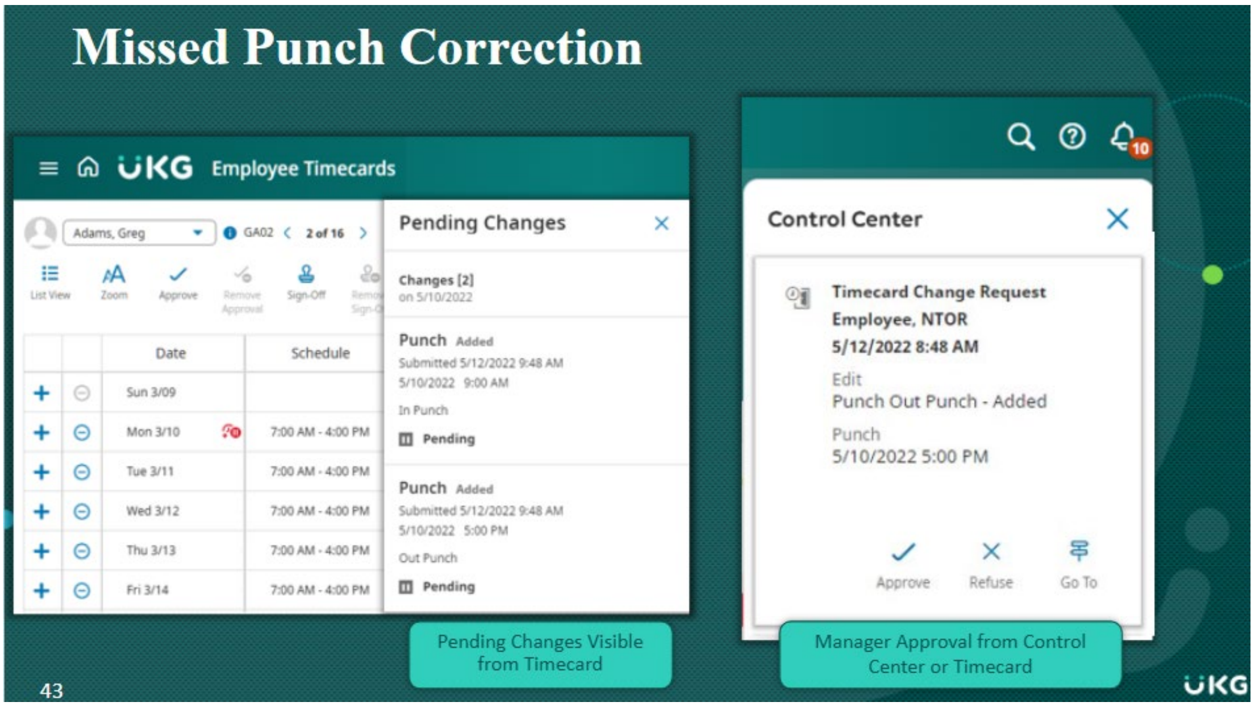
a. Right-click the cell again.
b. Select **Mark as Reviewed**.

5. **Save Changes**
   a. Click **Save** to finalize updates.

Job Aid: Approving or Refusing Employee Timecard Change Requests

Purpose

Employees can submit timecard corrections for missed punches or errors. Managers must approve or refuse these requests for changes to be recorded and exported for payroll.



Key Points

- Notifications for timecard change requests appear in the **Control Center**.
- Approval is required for changes to take effect and be included in payroll processing.

Steps to Approve or Refuse Timecard Change Requests

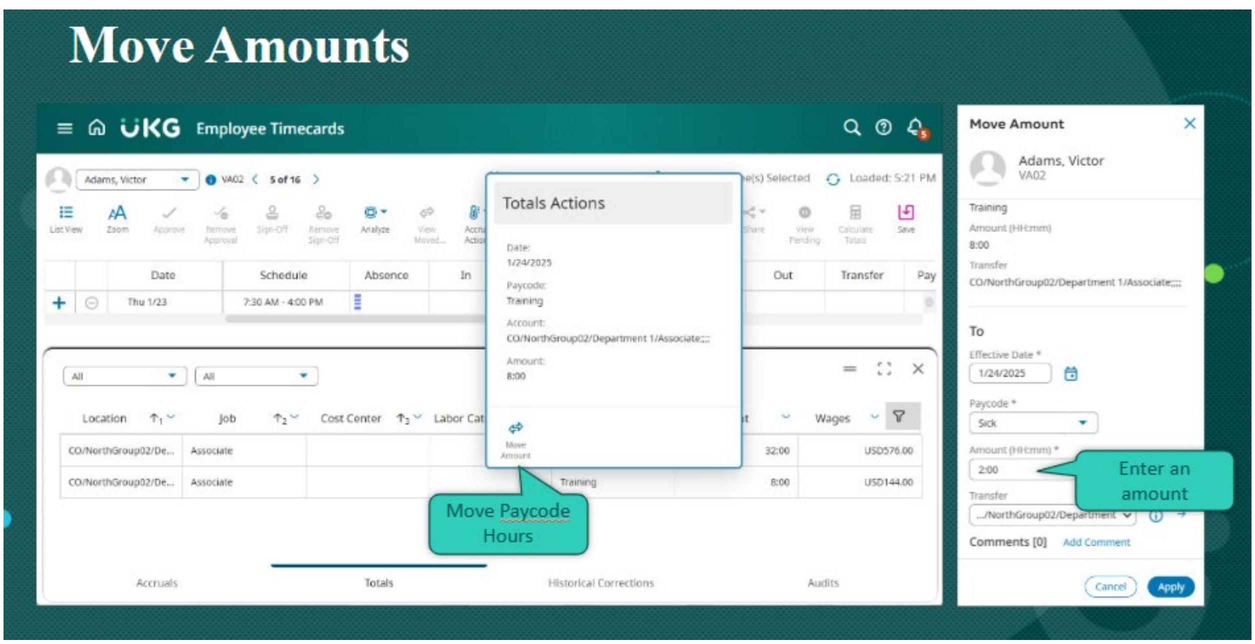
1. **Access the Notification**

    a. Click the **Notifications (bell)** icon on the Home page.
    b. Select the **Timecard Change Request** notification to open the **Control Center**.
2. **Review the Request**
    a. Check details of the requested changes (e.g., missing punches, corrected times).
3. **Take Action**
    a. Select **Approve** to accept the changes.
    b. OR select **Refuse** to reject the changes.
4. **Confirm**
    a. Ensure the action is saved so the request is processed correctly.

Job Aid: Moving Pay Code Amounts in Timecards

Purpose

The **Move Amount** feature allows managers to transfer time from one pay code to another when circumstances change during a shift (e.g., working hours changed to sick time). This ensures accurate payroll and reporting.



Example Scenario

Victor Adams attended training on Tuesday but left early due to illness. Two hours need to be moved from **Training** to **Sick**.

Steps to Move Pay Code Amounts

1. **Access the Employee's Timecard**
    a. Navigate to **Main Menu > Time > Employee Timecards**.
    b. Select the employee (e.g., Adams, Victor).
    c. Confirm you are viewing the **Previous Pay Period**.
2. **Open Totals Actions**
    a. Select the **Totals Add-on** at the bottom of the timecard.
    b. Right-click the **Amount** cell for the pay code (e.g., Training).
3. **Select Move Amount**
    a. In the **Totals Actions Glance**, choose **Move Amount**.
4. **Enter New Pay Code and Amount**
    a. In the **Move Amount** panel:
        i. Select the new pay code (e.g., Sick) from the drop-down.
        ii. Enter the amount to move (e.g., 2:00).
5. **Apply and Save**
    a. Click **Apply**.
    b. Select **Save** to confirm changes.

Additional Options

- **View Moved Glance**
    - Delete all moves made on the timecard.
    - Delete individual moves if needed.

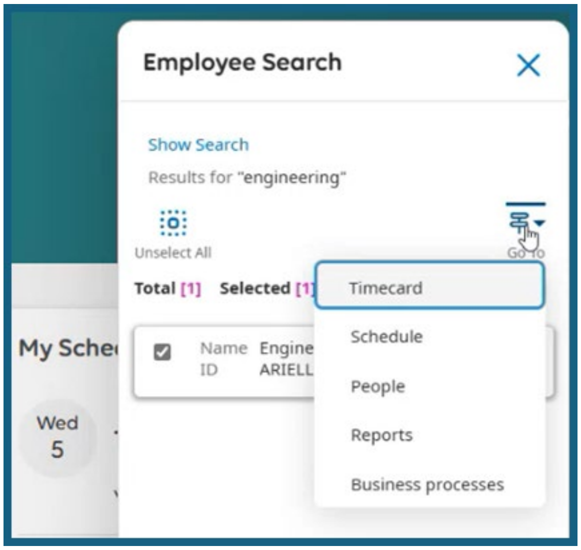
Job Aid: Labor Distribution and Banner Index Codes

Purpose

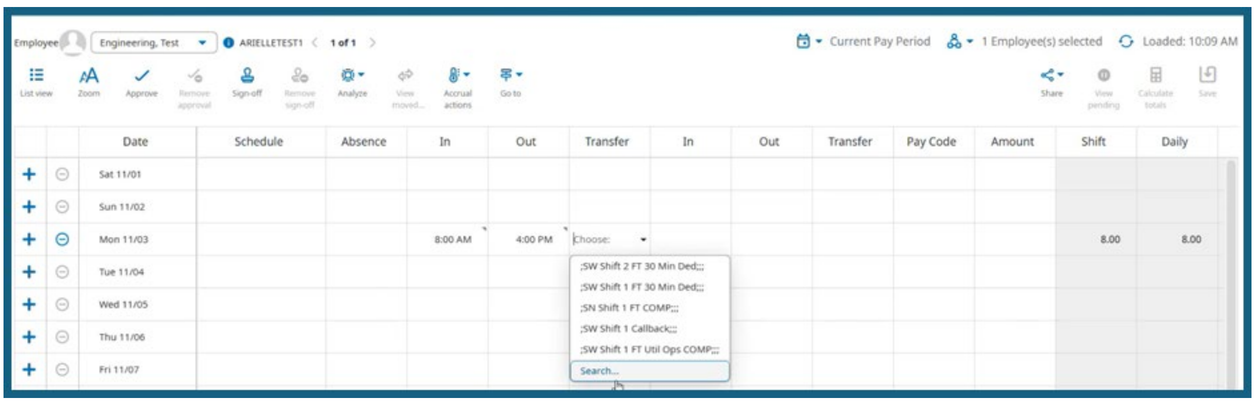
Assigning Index Transfers via Timesheet (after an in/out punch is recorded).

Steps

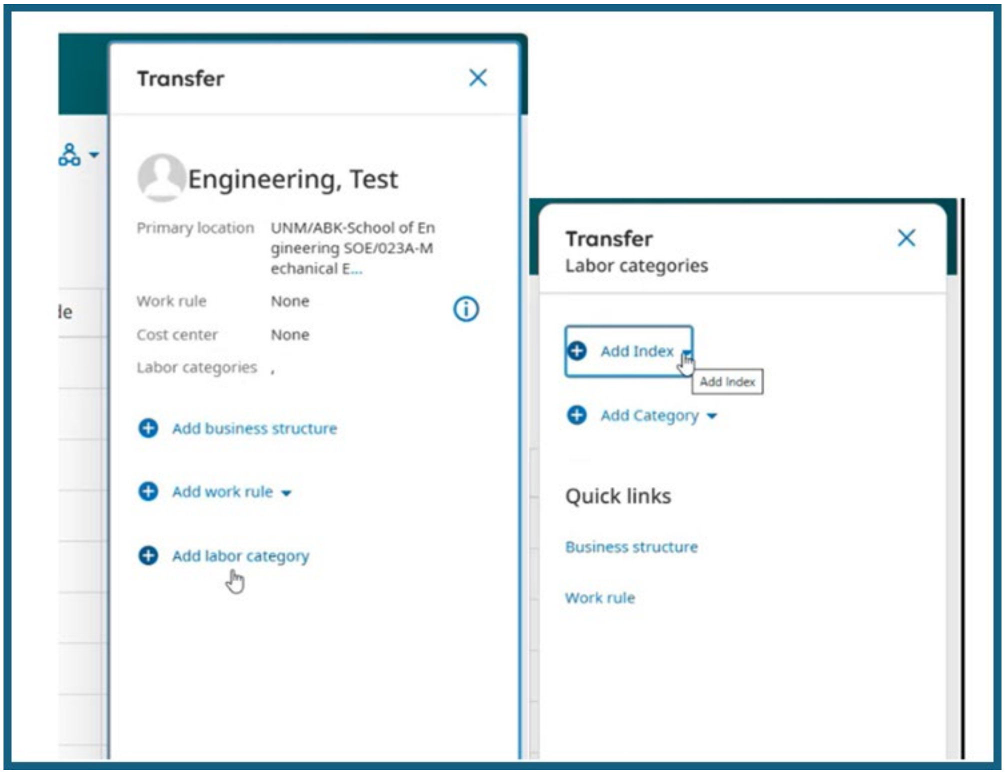
- Navigate to the employee's timecard.



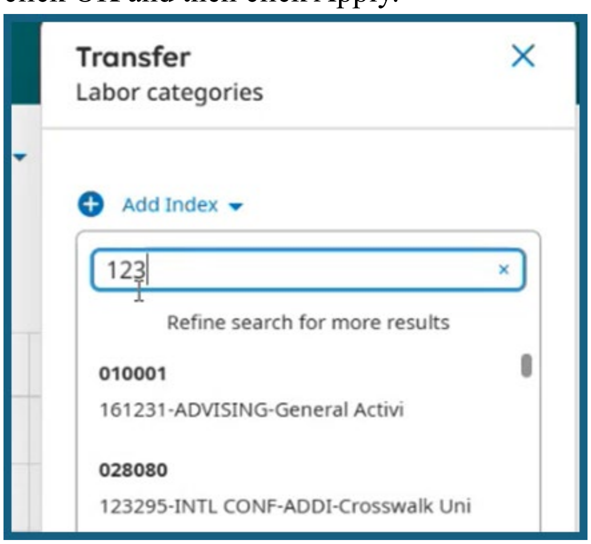
- Select the row of time to edit and click **Transfer**.



- Choose **Add Labor Category**, then **Add Index**.

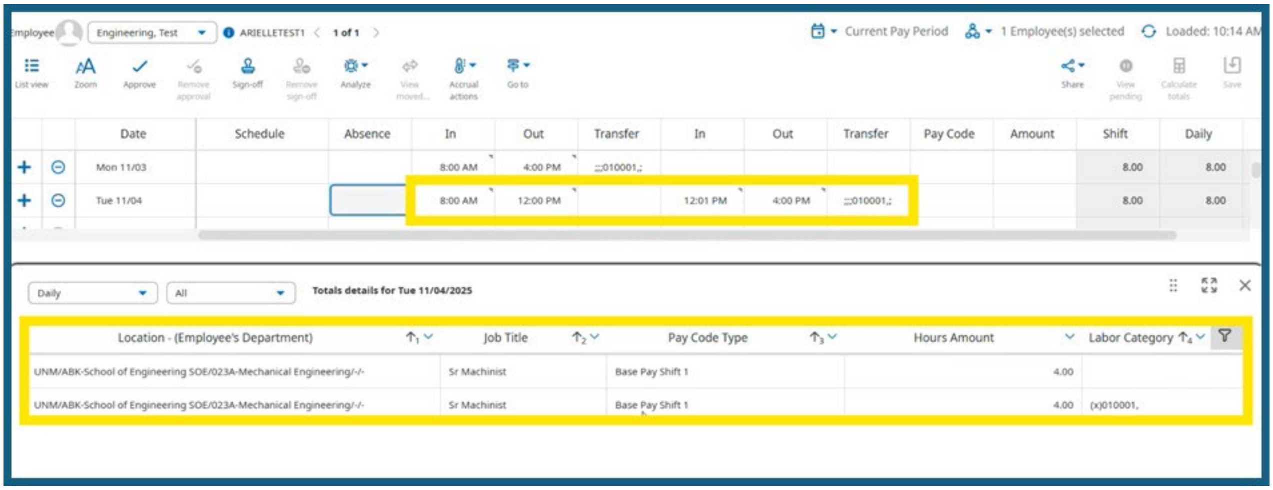


- Select **Add Index**, then type in an appropriate index in the search field, select index and click OK and then click Apply.



- Save changes.

Note: If splitting time within the same day between indexes, the In-Out times recorded to the left of the transfer column will be the time range the entered index will apply to. As shown here, the index transfer is applied to the In-Out time range of 12:01 PM – 4:00 PM (4 hours). The default index will apply automatically to the In-Out time range when no index transfer has been entered.

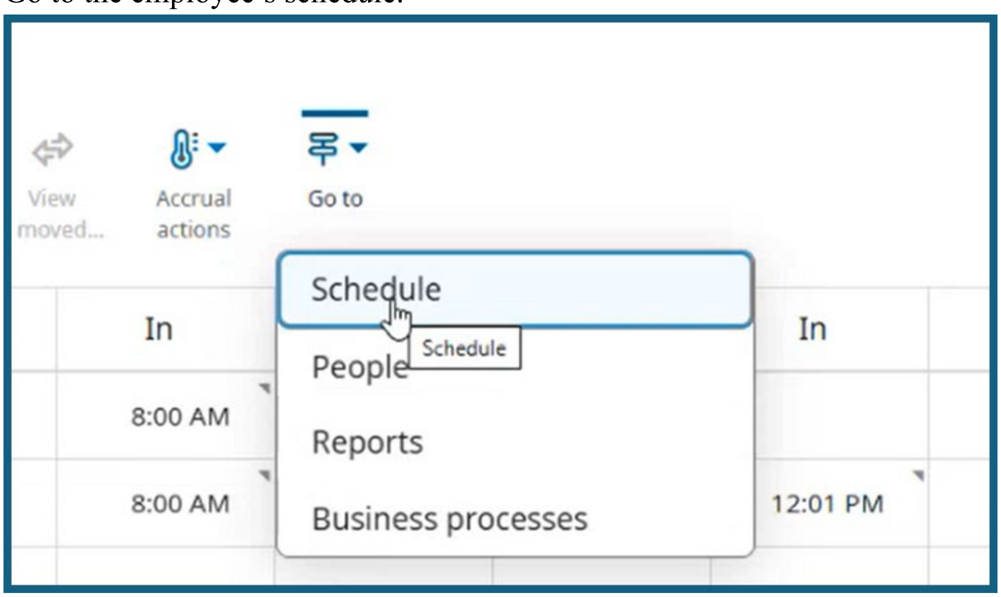


Assigning Indexes via Schedule:

If you know ahead of time that an employee is going to be doing work that needs to be assigned to a different index than the default index, you can use this method of assigning an index transfer using the scheduling tool. This could be helpful when multiple employees are anticipated to have the same index transfer needs; this method can be applied to more than one employee and/or when a pattern is applicable.

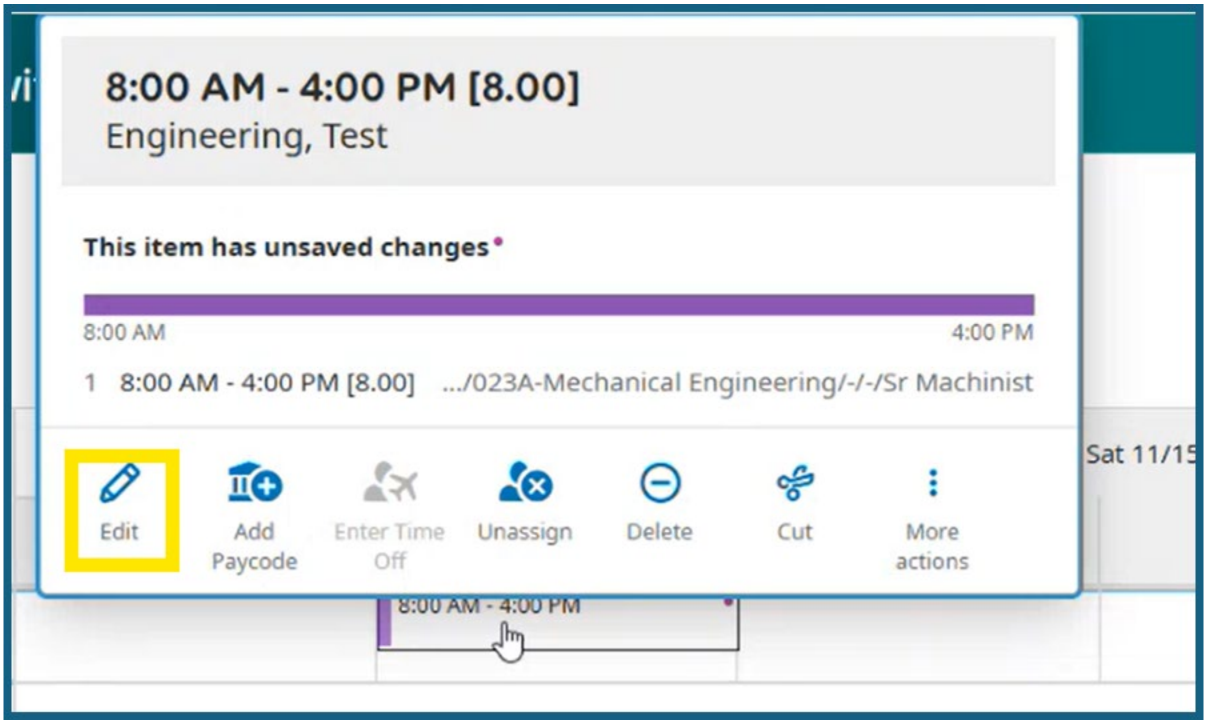
Steps

- Go to the employee's schedule.

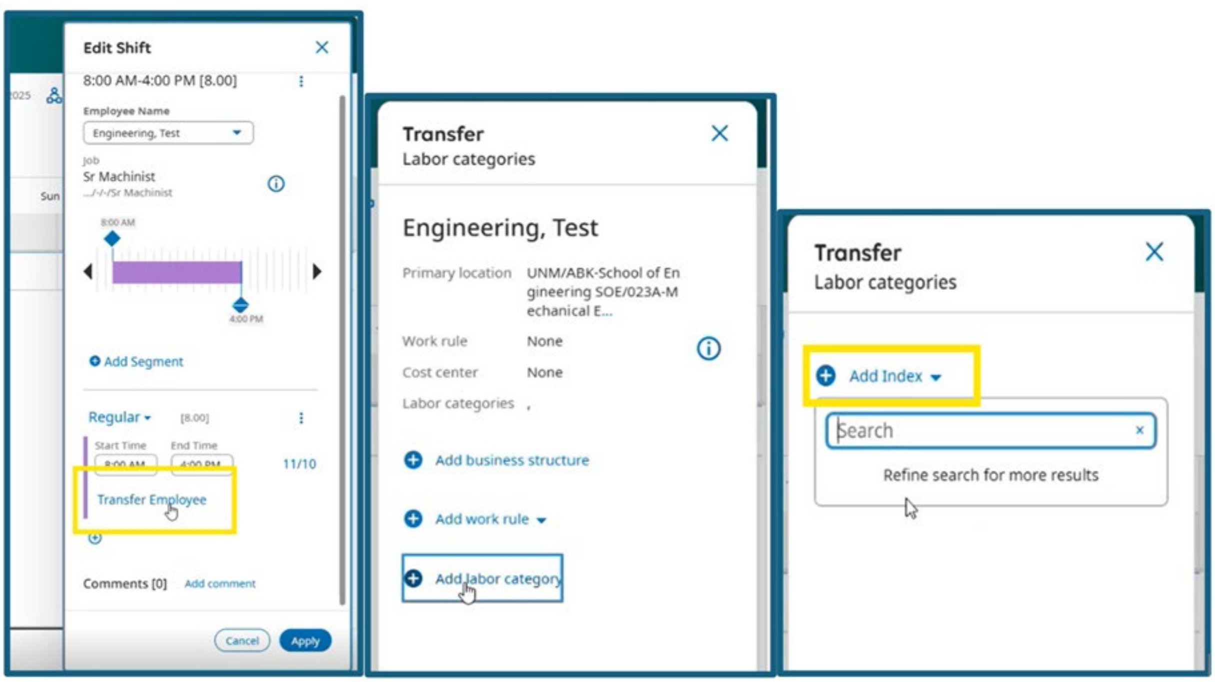


- Within the appropriate week, enter the schedule for the first day the schedule is intended to begin, for example: 8:00 AM – 4:00PM

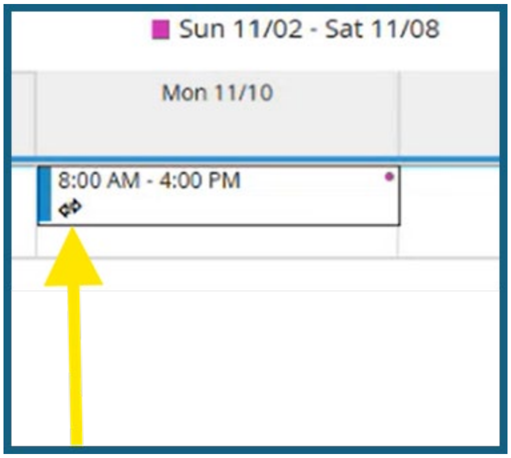
- Right-click the shift and select **Edit**.



- Click **Transfer Employee**, then **Add Labor Category** and then **Add Index**.

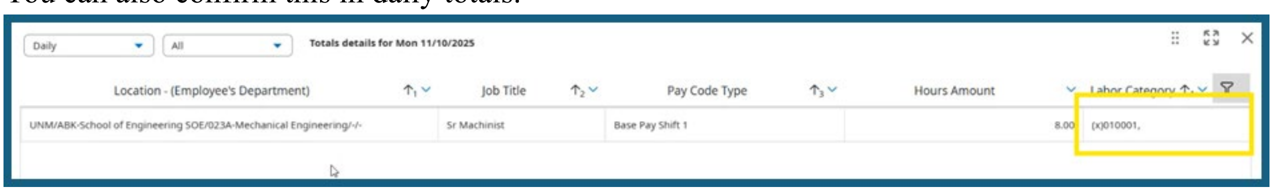


- Enter index in the search bar, select the correct index and click **Apply**.
  - The shift will now be colored blue and will indicate the index transfer with the two arrow icon in the left bottom corner.



- Save and copy/paste the shift as needed to other days as applicable.
- Now the system will auto-apply the index when the employee punches in. Shown in purple here:

- You can also confirm this in daily totals.



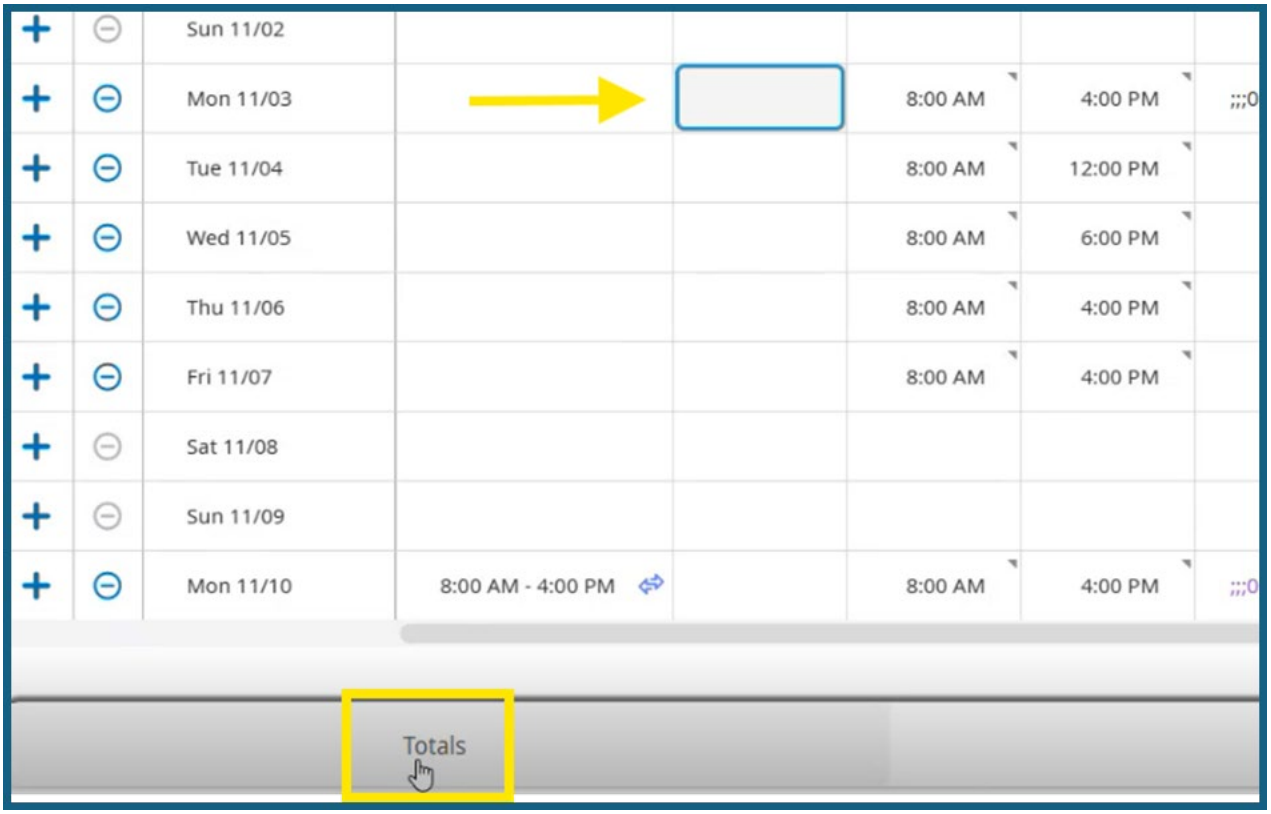
Job Aid: Changing Overtime (OT) to Comp Time

Purpose

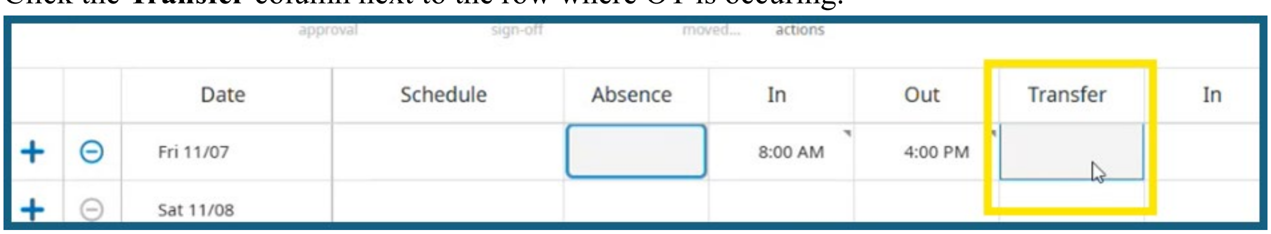
Converting overtime hours to compensatory time (Comp Time) in compliance with UAP 3305: Overtime and the Fair Labor Standards Act (FLSA). This process ensures non-exempt employees who have a written agreement with their supervisor can take time off in lieu of overtime pay, while maintaining accurate payroll records and adhering to University policy.

Steps:

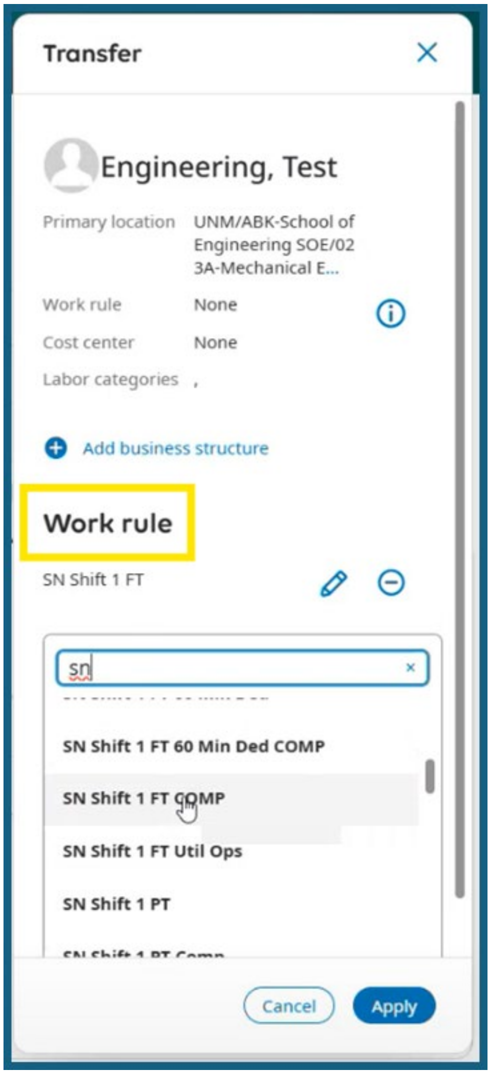
- Identify the day with overtime. Typically, the end of each work week overtime would apply. To identify this, you can select the day and click on **Totals, then daily** in the lower left corner to see what day OT is occurring.



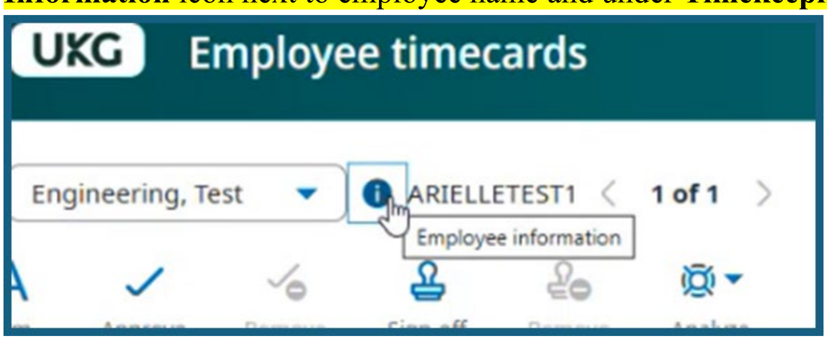
- Click the **Transfer** column next to the row where OT is occuring.



- Select the appropriate **Work Rule that matches employee type** (e.g., SN Shift 1 Full Time Comp) and click **Apply.**



- **Important Note:** Ensure the correct rule is selected based on employee class, shift, and lunch deduct status. You can check employee type by clicking on the **Employee Information** icon next to employee name and under **Timekeeping**.



- Click **Save**.
    - The system will convert eligible OT hours to comp time automatically.
- **Best Practice:** Apply the transfer to the last clock-out of the day.

Job Aid: Approving Overtime Using Group Approvals

Purpose

The **Overtime Group Approvals** feature allows managers to approve or deny overtime for multiple employees at once, saving time compared to reviewing individual timecards.

Steps to Approve Overtime for Multiple Employees

1. **Access Overtime Group Approvals**
   a. From the **Main Menu**, select:
      i. **Time > Overtime Group Approvals**.
2. **Select the Timeframe**
   a. Ensure **Previous Pay Period** is selected.
   b. Adjust if necessary.
3. **Review Pending Overtime**
   a. Use the **Pending Overtime** drop-down under the **Grouped By** column to view employees with pending overtime.
4. **Select Employees**
   a. Click **Select All** to choose all employees.
   b. *(Optional)* Select individual employees if needed.
5. **Approve Overtime**
   a. Click **Edit**.

    b. In the **Group Approve Overtime** glance:
        i. Choose **Approve All**.
        ii. Click **Apply**.
6. **Verify Approval**
    a. Navigate to:
        i. **Main Menu > Dataviews and Reports > Group Edit Results**.
    b. Review the results of the group approval.

Key Benefits

- Approve or deny overtime for multiple employees in one action.
- Reduces time compared to reviewing each timecard individually.

Job Aid: Payroll Adjustments – Prior Hours Worked

Purpose

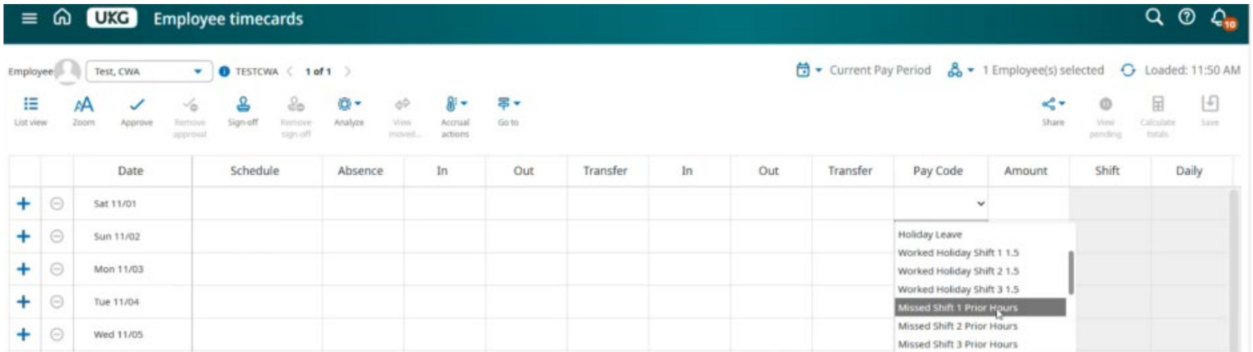
Add missed hours from previous pay period for part time staff and students who did not have a job record or UKG profile in time for reporting hours worked.

Important notes on when this method of correction allowed:

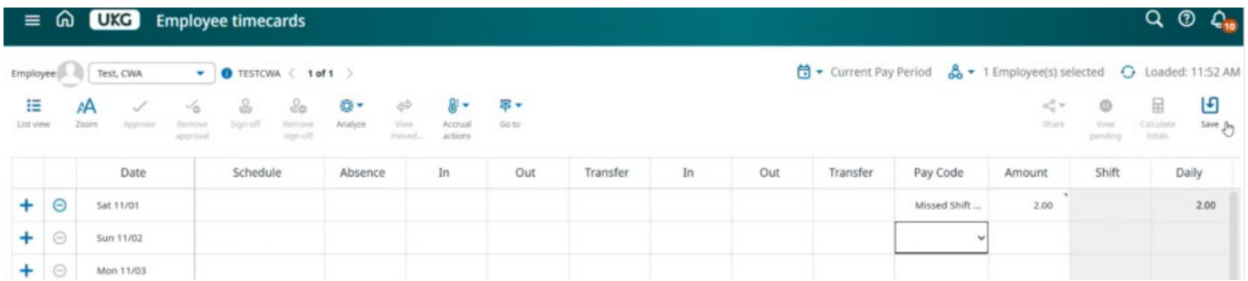
- Only use prior hours for Student Employees or On-calls/Part Time Employees.
- For full-time employees, please submit an adjustment form to Payroll to assess any overtime and leave accruals.
    - You can find the link to the payroll adjustment form here: Time Entry and Forms :: Payroll Office | The University of New Mexico
- Make sure to put comments as to what the prior hours are for.
- Contact pay@unm.edu if you are unsure if the situation qualifies for utilizing prior hours worked.

Steps:

1. Go to Current Pay Period in Timecard.
2. Choose a date to enter the hours (doesn't matter which day).
3. In the Pay Code, select Missed Shift – Prior Hours Worked. Make sure you select the correct shift that corresponds to the time the hours were worked.



4. Enter the number of hours (e.g., 2.00).



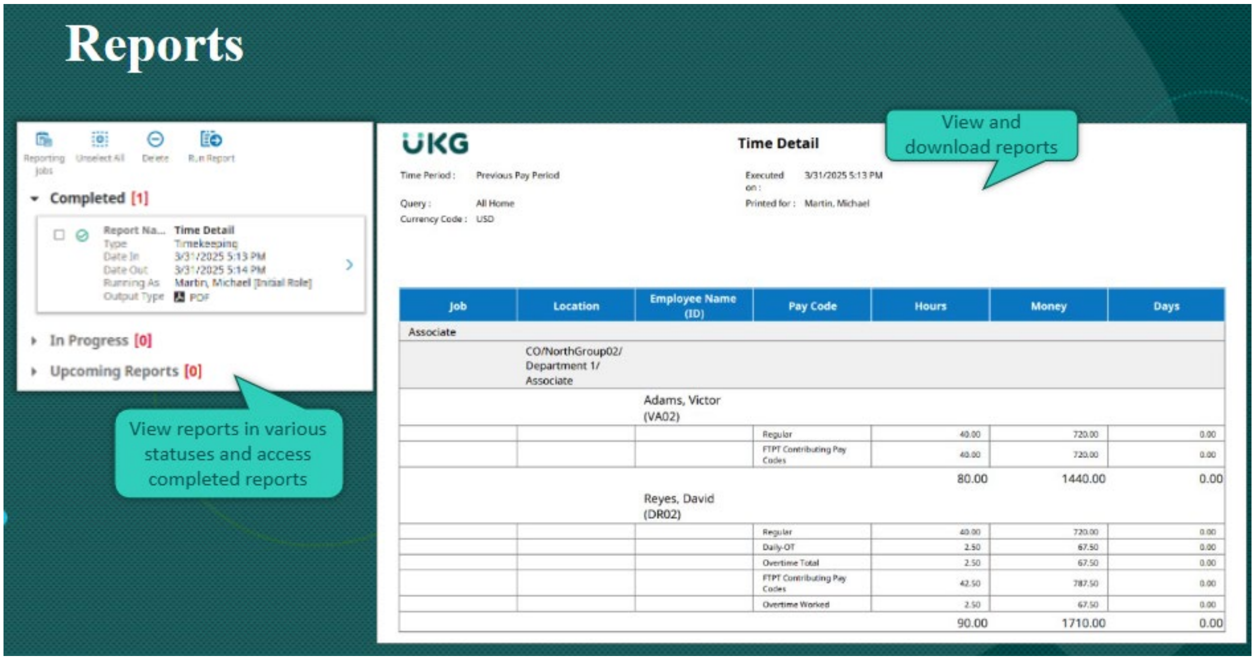
5. Click Save.

Job Aid: Running Reports in the Report Library

Purpose

The Reports Library provides a snapshot of data at the time you run the report. Use these reports to monitor attendance, absences, and other timekeeping details.

Tip: Report availability depends on your access level.



1. Accessing the Reports Library

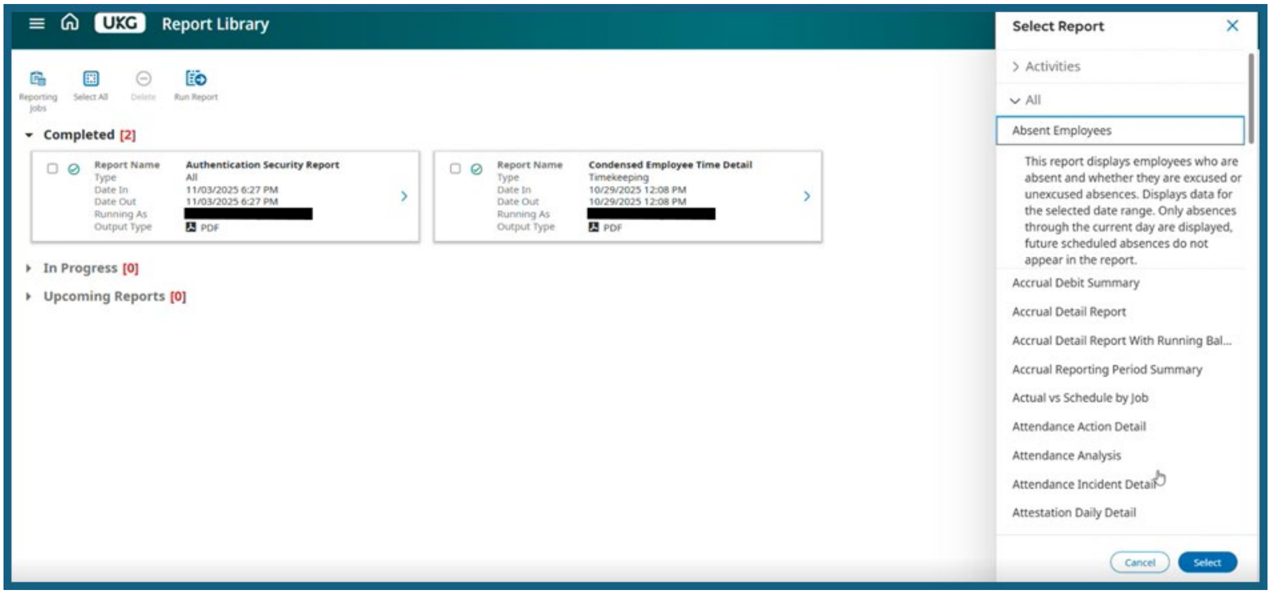
- Navigate to Reports Library in UKG.
- Note: Reports are static snapshots—the data will update but typically after a pay cycle has closed.

2. Viewing Completed Reports

- Completed reports display:
  - Report Name
  - Date and Time Run
- These are historical snapshots for reference.

3. Running a New Report

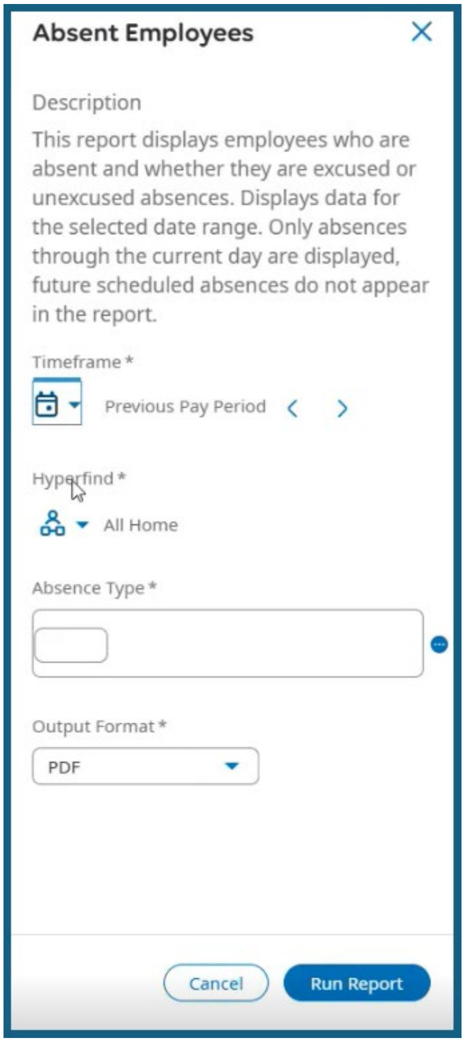
- Click Run Report.
- Choose a Category or select All to view the full library.
- Browse available reports and select the one you need.
- Each report includes a description of what it displays.



Example:

- The absent Employees Report shows employees who are absent, including whether absences are excused or unexcused.

4. Setting Parameters



- Select a time frame (e.g., previous pay period).
- Apply HyperFind filters:
  - Pre-built filters (e.g., Faculty, Exempt Employees, Managers).
  - Create custom filters using New HyperFind.
- Choose additional options (e.g., type of absence).
- Click Apply.

5. Running and Downloading

- Click Run Report.
- Status changes from In Progress to Completed.
- Download the report to view results.

Report Output Includes:

- Employee details.
- Absence type (excused/unexcused).
- Dates of absence.

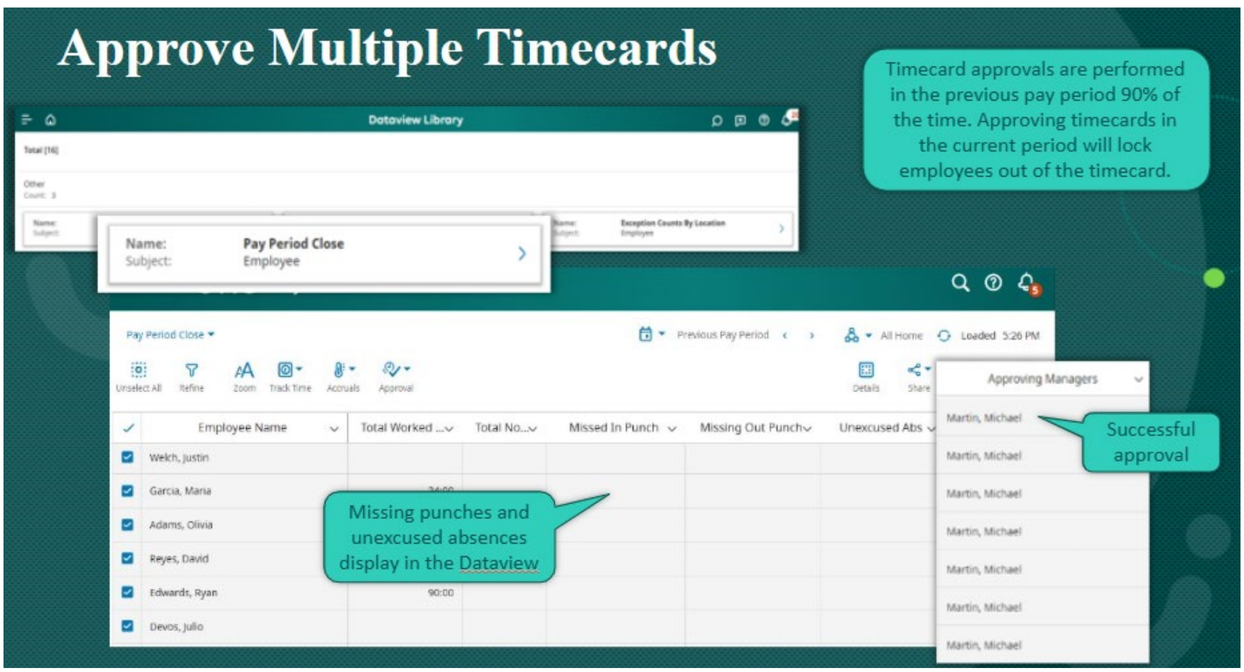
Key Tips

- Each report has unique parameters—review options before running.
- Reports are static; rerun if you need updated data.
- Use HyperFind filters to narrow results for specific groups.

Job Aid: Approving Employee Timecards (Group)

Purpose

Managers can approve multiple timecards at once using the **Pay Period Close** Dataview.



Important:

- Once approved, managers cannot make changes unless they **remove approval**, edit, and re-approve.
- Approvals are usually done for the **previous pay period** (90% of the time).
- Approving timecards in the **current period** will lock employees out of their timecard.

Steps to Approve Timecards as a Group

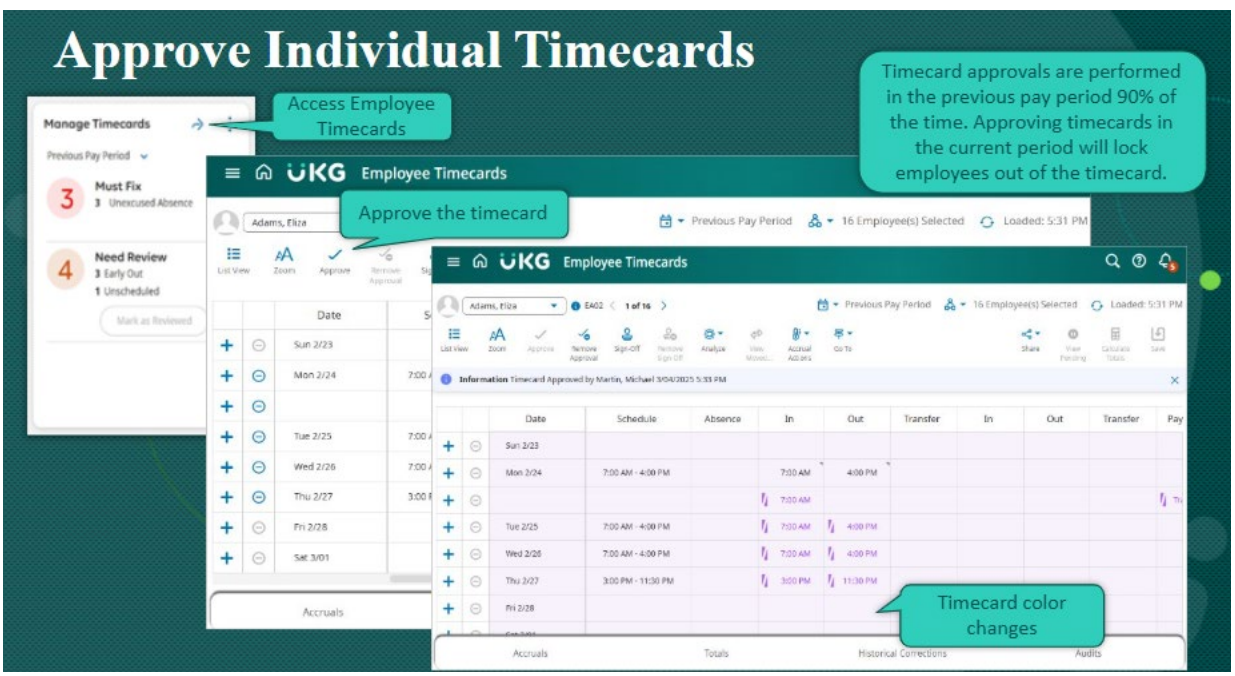
1. **Select** the **Main Menu** icon.
2. **Expand** options by selecting **Dataviews & Reports**.
3. **Open Dataview Library**.
4. **Choose Pay Period Close** (or other applicable Dataview).
5. **Select Select All**.
6. **Click Approval**.
7. **Select Approve Timecard**.
8. **Confirm** by selecting **Yes**.

Job Aid: Approving an Individual Employee Timecard

Purpose

Managers can approve timecards individually after reviewing and correcting any errors.

Note: After approval, the timecard changes color to indicate status.



Steps to Approve an Individual Timecard

1. From the **Manage Timecards** tile, select the **All Timecards** arrow.
2. **Confirm** the correct time period.
3. **Select** the employee's name.

4. **Open** the **Totals** add-on.
5. **Verify** the timecard is accurate.
6. **Select Approve**.

Job Aid: Signing Off Employee Timecards

Purpose

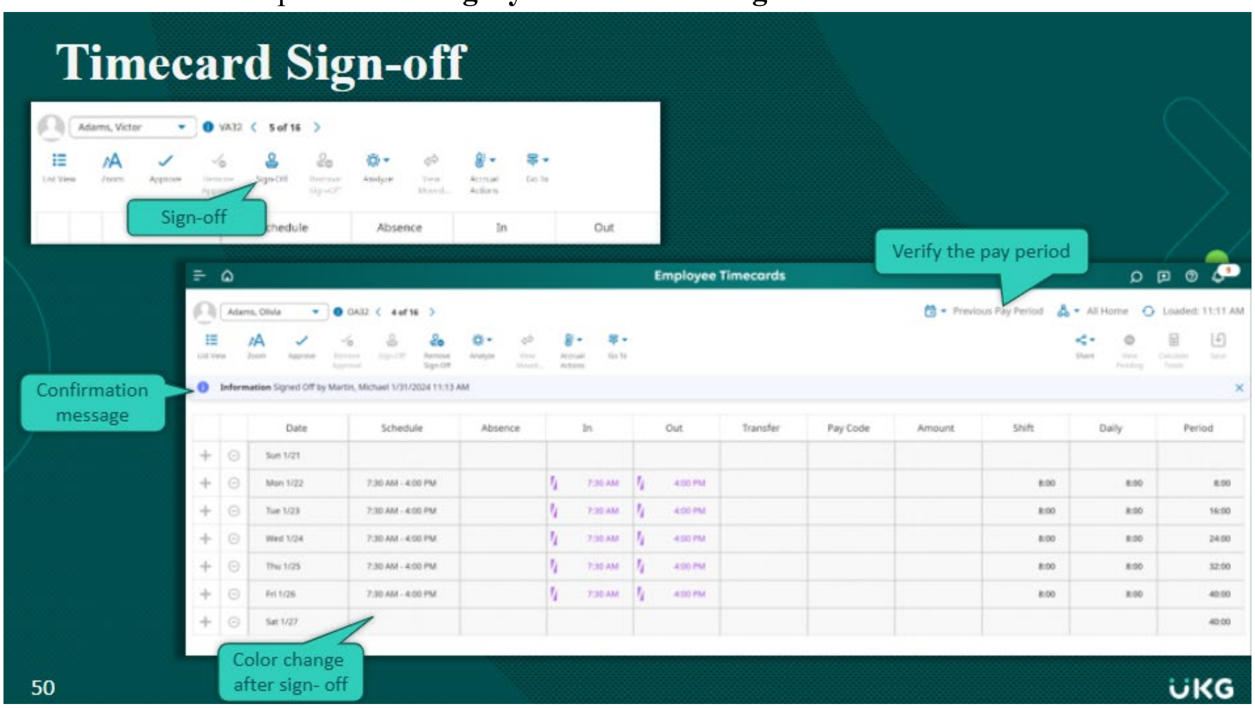
Org Managers can sign off employee timecards for the **previous pay period** once all timecards are approved and accurate.

Definitions:

- Employee Approval: Confirms their timecard is correct.
- Manager Approval: Confirms accuracy of time worked.
- Org Manager Sign-Off: Locks the timecard; no further edits allowed.

Why Sign Off?

- Prevents further edits to timecards and schedules.
- Indicates completion with a **gray crosshatch background**.

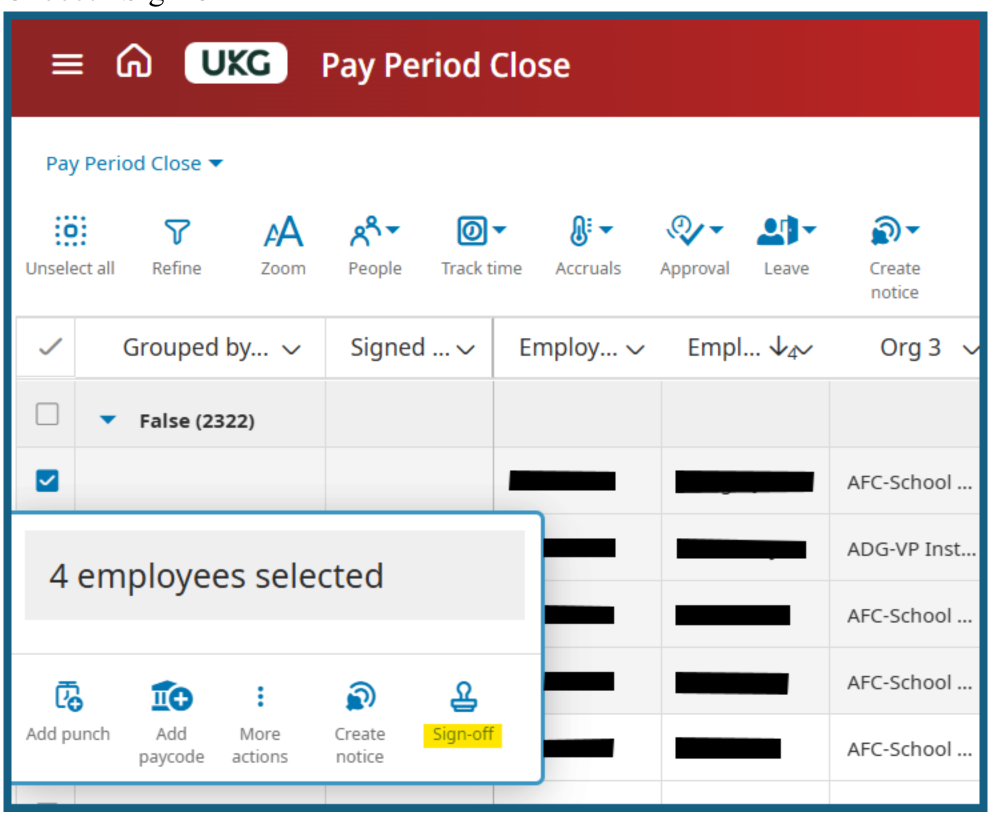


Important Notes

- You **cannot remove approval after sign-off** unless you **remove the sign-off first**.
- Only Org Managers may remove sign-off to make edits.
- Sign-off can be applied:
    - **In bulk** via a Dataview (e.g., **Pay Period Close**).
    - **Individually** on each timecard.

Steps to Sign-Off on all timesheets for your org (Org Manager only):

- Go to Dataviews Library
- Select “Pay Period Close” Dataview
- Select all employees that you would like to sign-off for
- Right click on one of the employees
- Choose “Sign-Off”

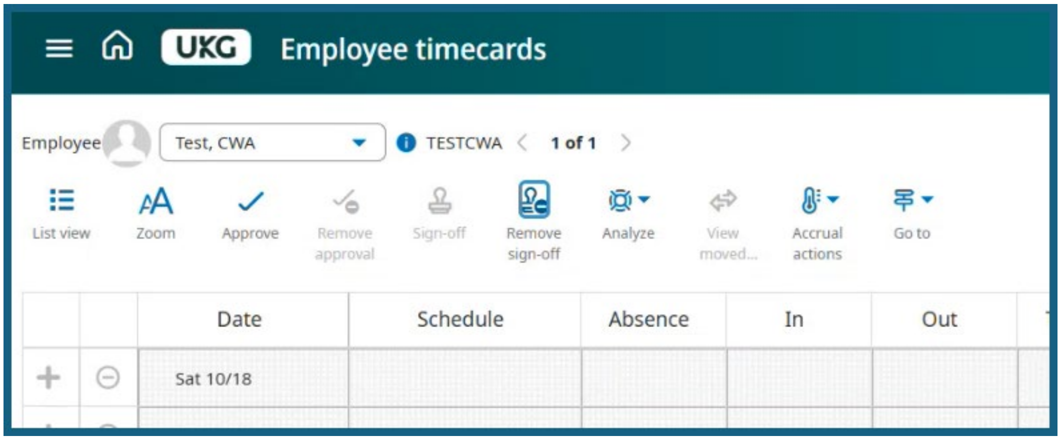


Verify Sign-Off

- Access **Group Edit Results Dataview** to confirm sign-off completion.

Steps to Remove Sign-Off on a timecard (Org Manager only):

1. Navigate to Timecard.
2. Click Remove Sign-Off.

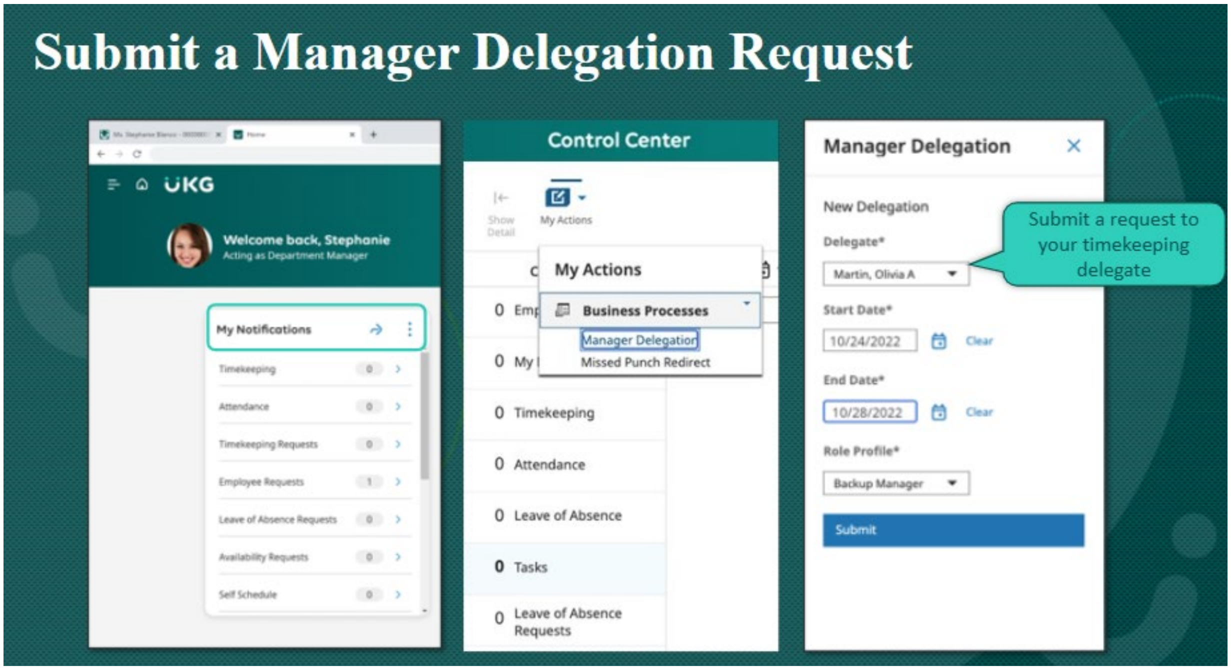


3. Make necessary edits.
4. Reapply Sign-Off before payroll cutoff.
    a. **Important Note**: Removing sign-off for corrections should only occur prior to payroll cutoff (typically Monday at 4pm). If you make corrections after payroll has run, those corrections will not be captured on the pickup. Pickups only add timesheets that were not in sign-off status at the time of the original payroll run. Any corrections to timecards that were already signed off and submitted should be done through the payroll adjustment process.

Job Aid: Assigning a Delegate for Timekeeping Duties

Purpose:

Org Managers can assign a delegate to handle timekeeping tasks during periods of absence (e.g., vacation).



Key Points

- The manager who will be absent selects and submits the delegate request.
- Delegates temporarily assume timekeeping responsibilities for the specified duration.

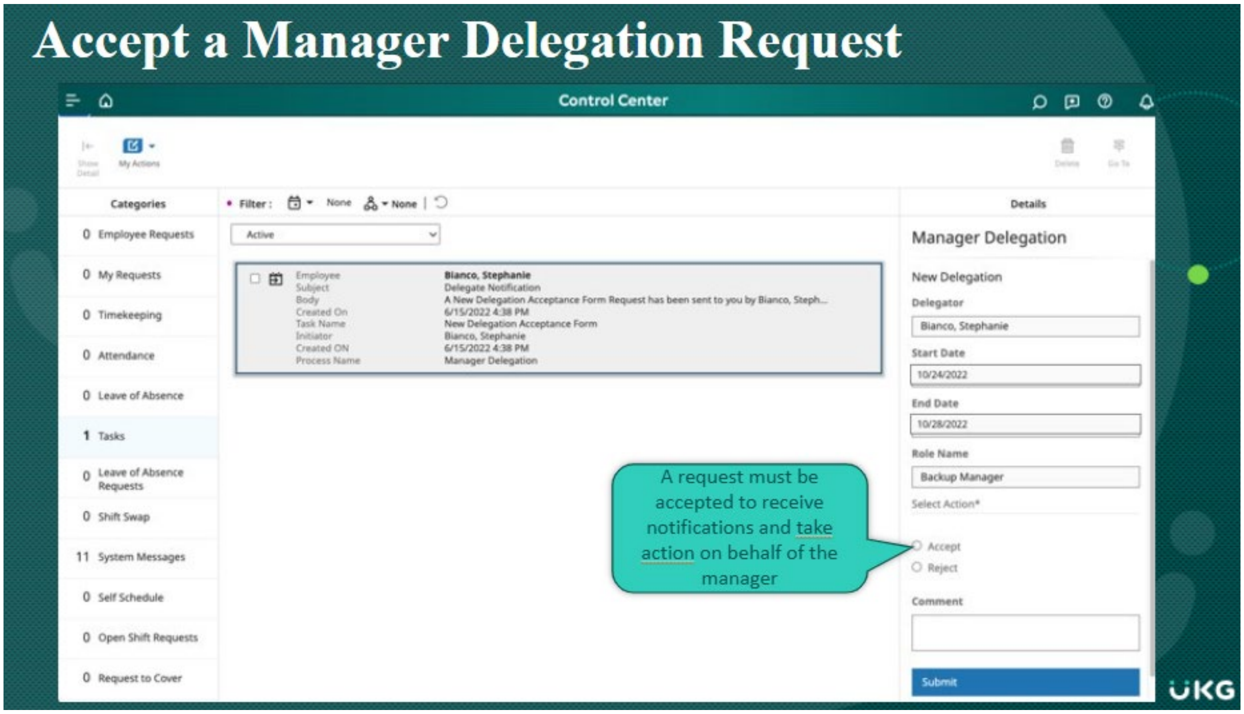
Steps to Assign a Delegate

1. **Access** the timekeeping system.
2. **Navigate** to the **Delegate Assignment** option (location may vary by system).
3. **Select** the employee to act as your delegate.
4. **Specify** the start and end dates for the delegation.
5. **Submit** the request for confirmation.

Job Aid: Accepting a Manager Delegation Request

Purpose:

When a manager assigns you as a delegate in Workforce Management, you must accept the request for delegation tasks to take effect.



Key Points

- Delegation begins automatically on the **start date** indicated after acceptance.
- After accepting, you **must log out and sign back in** for the change to apply.

Steps to Accept a Delegation Request

1. **Access** Workforce Management.
2. **Locate** the pending delegation request.
3. **Select Accept**.
4. **Log out** and **sign in again** to activate delegation.

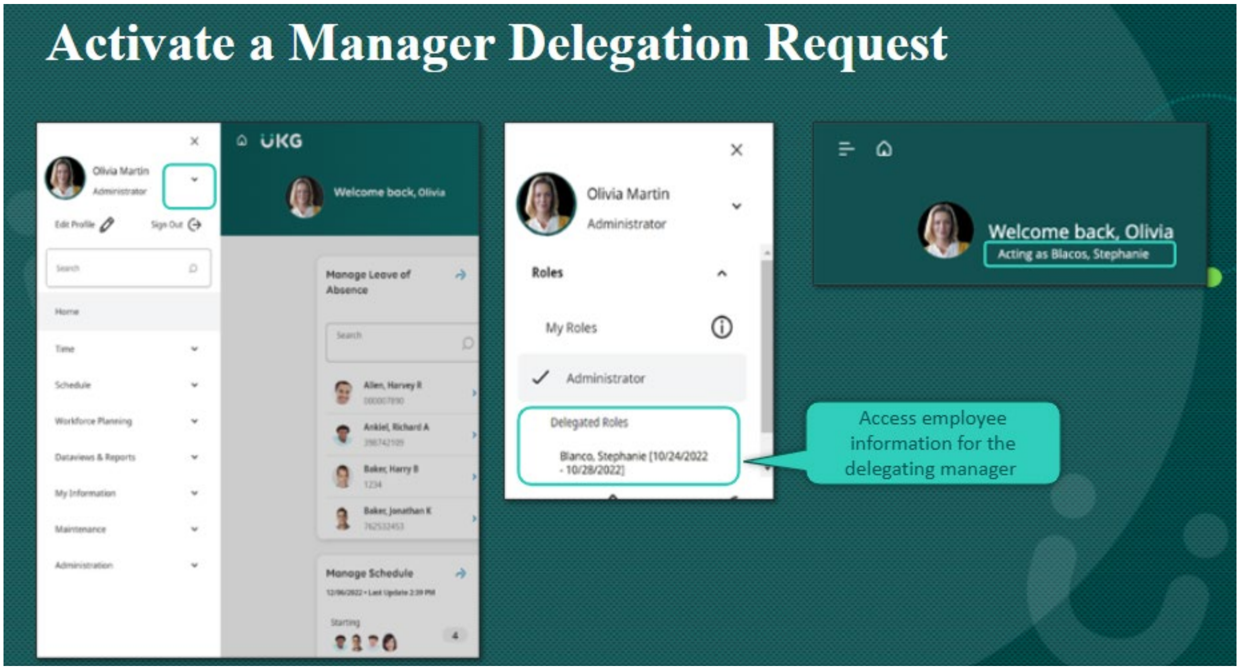
Verify Delegation

- Confirm that you have access to timekeeping tasks for the specified duration.

Job Aid: Activating and Using a Delegated Role

Purpose:

After accepting a delegation request, the delegated manager must activate the role to perform timekeeping tasks.



Key Points

- Delegation begins on the **start date** indicated.
- You can **toggle between your original role and delegated role** as needed.

Steps to Activate Delegation

1. **Log in** to Workforce Management.
2. Go to **Employee Menu Settings**.
3. **Select** the delegated role.
4. **Confirm** activation.
5. Toggle between roles as necessary.

Job Aid: Managing Employees with Multiple Assignments

Purpose

Multiple assignments is used for employees with more than one role within the organization. An assignment can have several unique attributes that allow the organization to pay employees correctly, route notifications to different managers, and approve or schedule employees by assignment.

View Assignments in the Timecard

Employees and managers can see assignments in the employee timecard and in the Totals add-on.

Navigation: Main Menu > My Information > My Timecard

1. View the **Assignment** column in the timecard.
2. Select the **Totals** add-on.
3. Select or deselect the **Assignment Grouping** checkbox to group the totals by assignment.

Selecting the checkbox will add the Assignment column in the Totals add-on. Deselecting will remove the Assignment column.

View Assignments in Dataviews

Assignment detail is included in Dataviews.

Navigation: Main Menu > Dataviews & Reports > Dataview Library

1. Select the **Employee Basic Summary** Dataview.
2. View the **Primary Assignment** column.

Job Aid: Approving Time for Multiple Assignment Employees

If the employee has a primary exempt job and a secondary non-exempt job, they will have a biweekly profile in UKG. This means timecards need to be approved and signed off on the same timeline as the remainder of your non-exempt employees, even for your exempt employee who has a secondary job. We have to sign off every 2 weeks instead of once a month.

Manager Responsibilities:

The manager of the Primary exempt job needs to approve the employee's timecard for their leave only on the bi-weekly pay cycle.

The manager of the Secondary non-exempt (on-call) job needs to approve the employee's timecard for their time worked (excluding leave) on the bi-weekly pay cycle.

Both managers need to approve the respective timecards timely in order for the Primary Department Org Manager to perform Sign-off.

Org Manager Responsibilities:

Only ONE Org Manager can perform sign off for multiple assignment employees. The Org Manager for the Primary role should be the person performing sign-off after validating that the managers on both jobs have approved the timecard.

How to confirm this:

In **Multiple Assignment Dataview**- Review the checkbox in the last column indicating if the job is primary or secondary to ensure which employees you are responsible for performing sign-off for.

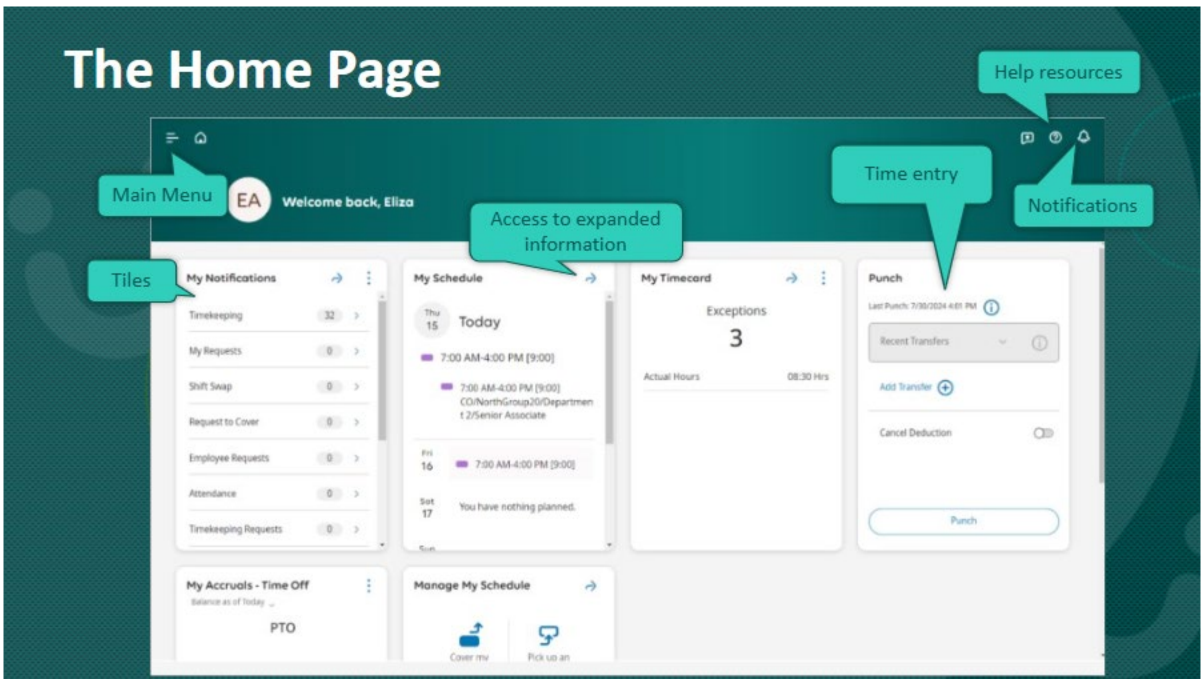
In **Sign-off status/Pay Period Close Dataview**- Review the column called **Manager Approval Count** and **Approving Manager** to show whether more than one manager approves a timecard. You would need to know your multiple assignment people and then check that they have 2 in that column before signing off.

Employee Job Aids:

Job Aid: Navigating the Homepage

Purpose:

The homepage gives employees quick access to key timekeeping features, including entering time through the **Punch** option.



Key Features

- **Tiles** display important information and actions related to your schedule and time entry.
- **Arrows** on certain tiles allow you to navigate to expanded pages for more details and options.

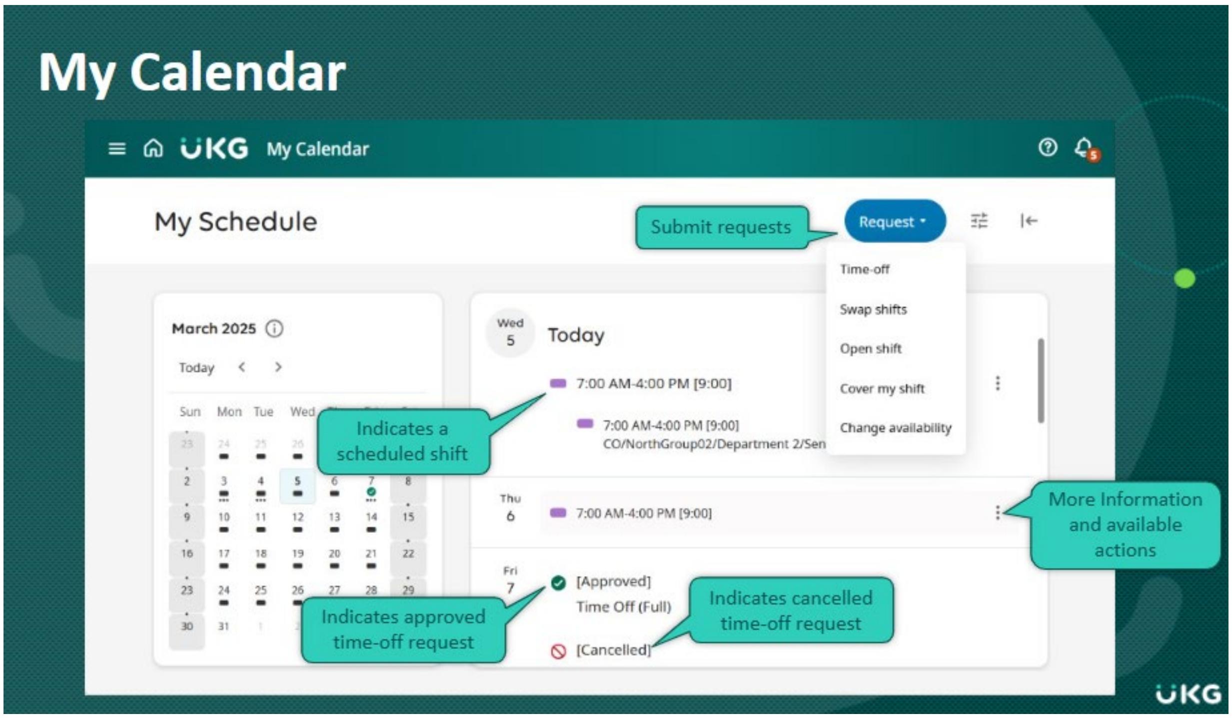
Tips for Employees

- Use the **Punch tile** to enter your time quickly and accurately.
- Explore tile arrows to view additional details like schedules, timecards, and other options.

Job Aid: Viewing Your Schedule

Purpose:

Employees can view all schedule-related information in one place, including shifts, time-off requests, and holidays.



Key Features

- **Your Schedule**: Displays your assigned shifts.
- **Time-Off Requests**: Shows approved and pending requests.
- **Holidays**: Lists company-recognized holidays.

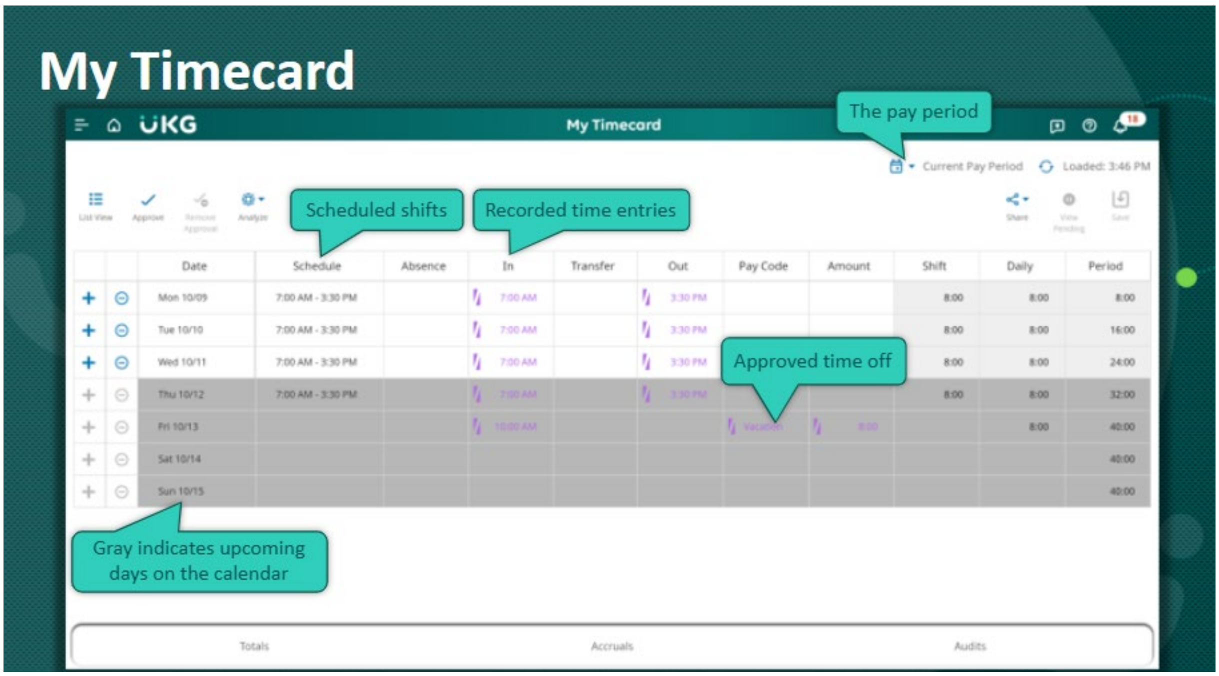
How to View Your Schedule

1. **Log in** to the Workforce Management system.
2. Navigate to the **Schedule** tile on the homepage.
3. **Click** the tile or arrow to open the full schedule view.
4. Review your **shift details**, **time-off status**, and **holiday information**.

Job Aid: Viewing and Managing Your Timecard

Purpose:

Employees can review and manage their time entries using the **My Timecard** tile. This page provides visibility into current, past, and upcoming days, as well as tools for editing and verifying time.



Key Features

- **Current & Past Days**: Display in **white cells**.
- **Upcoming Days**: Display in **gray cells**.
- **Icons**: Hover over icons for more details about time entries (e.g., exceptions, edits).

Views Available

- **List View**: Commonly used on **mobile devices**.
- **Table View**: Commonly used on **desktop**; displays a grid of rows and columns with:
  - Daily punches (In/Out)
  - Paycodes and amounts
  - Schedule and absence info
  - Shift, daily, and pay period totals

Action Bar Functions

- **Edit your timecard**
- **Submit approvals**
- **Calculate totals**
- **View Rule Analysis report**
- **Save or print your timecard**

Working in the Timecard Grid

- Scroll **up/down/left/right** to view the entire pay period.
- **Resize columns** by dragging dividers; changes are saved.
- **Enter time directly** in a cell; use **Tab** to move to the next cell.
- Hover over cells for tooltips:
  - **Date Cell**: Exceptions, date, overtime needing approval.
  - **Punch Cell**: Punch time, exceptions, edits.
  - **Paycode Cell**: Full paycode name, exceptions.
  - **Amount Cell**: Amount, exceptions, edits.

Important Note

If a punch, paycode, or shift crosses **midnight**, the additional day is displayed and calculated in both **Table** and **List Views**.

Job Aid: Approving Your Timecard at the End of a Pay Cycle

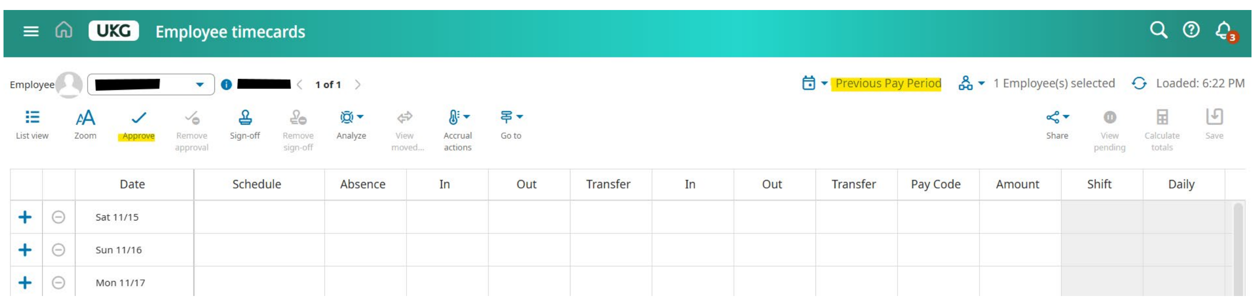
Purpose

At the end of each pay cycle, you are required to review your timecard for accuracy and approve it. Once you approve, your manager will review and approve as well. This step is required for non-exempt employees and considered best practice for exempt employees.

To approve your Timecard:

Steps to Approve Your Timecard

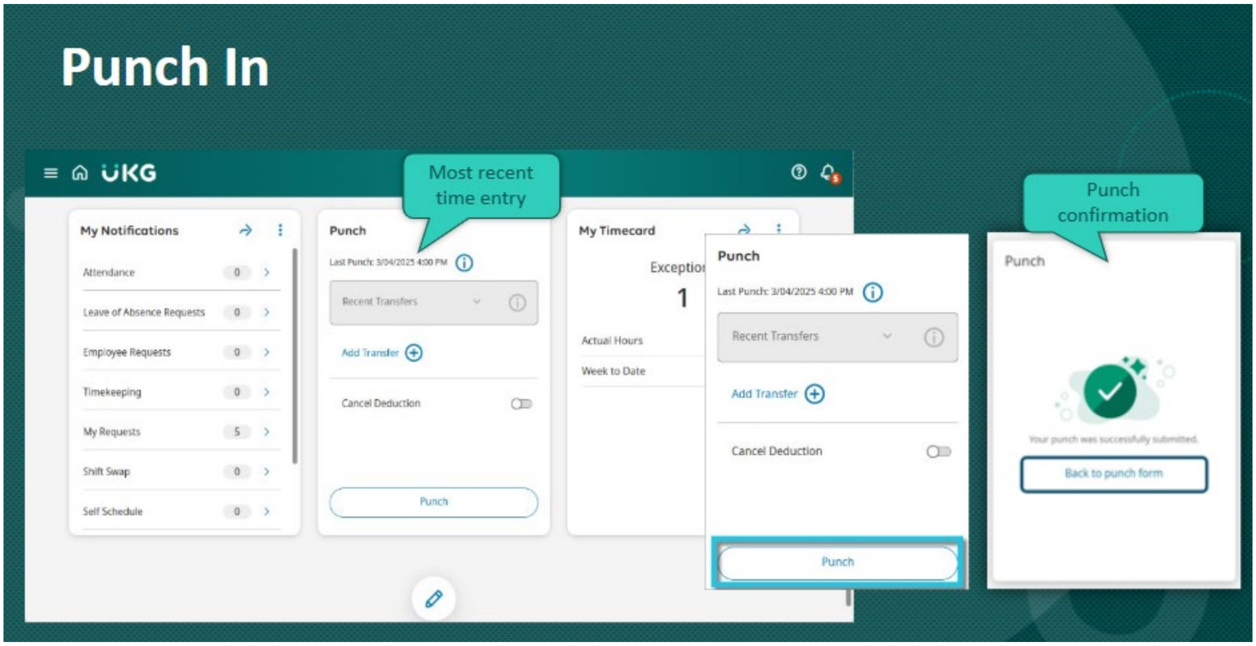
1. **Open Your Timecard**
   - Click the shortcut arrow on the **My Timecard** tile on your Home Page.
2. **Select the Correct Pay Period**
   - Ensure you are viewing the **Previous Pay Period**.
3. **Review for Accuracy**
   - Check all punches, pay codes, and totals.
   - Make any necessary corrections.
   - *Note:* Any edits you make will require manager approval before they apply to your timecard.
4. **Approve Your Timecard**
   - Click the **Approve** button at the top of the page.



Job Aid: Recording Time Using the Punch Tile

Purpose:

Non-exempt employees can record their **in and out times** using the **Punch tile** to ensure accurate work reporting for payroll.



Key Points

- Recording punches is the **first step** in capturing correct time data.

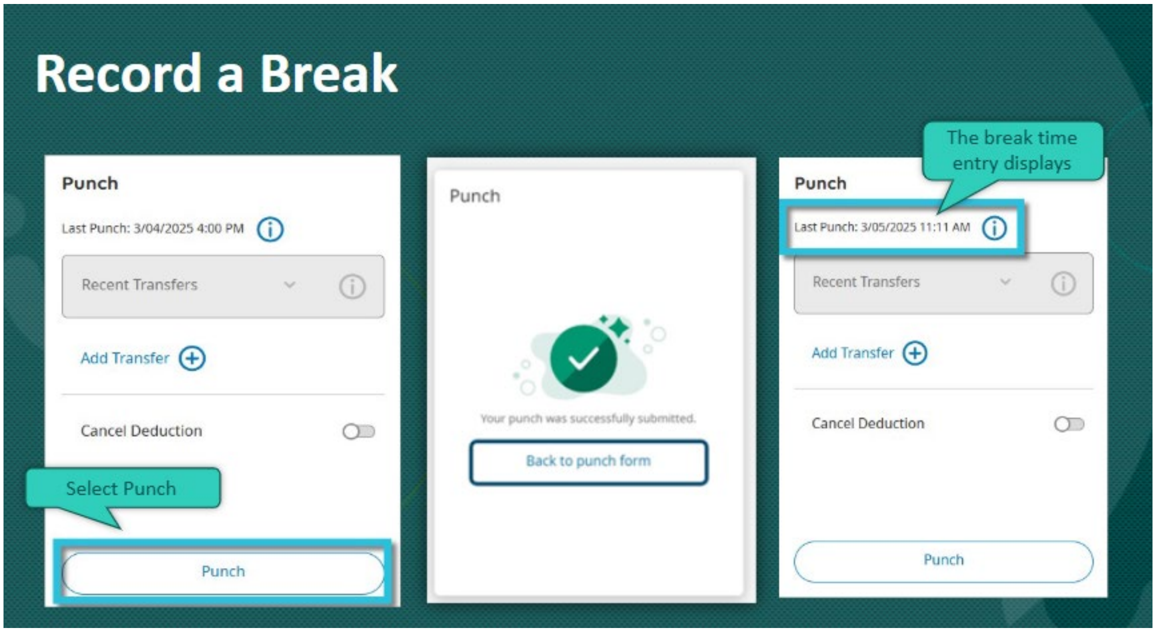
Steps to Record Time

1. **Log in.**
2. On the homepage, **select the Punch tile**.
3. **Choose** the appropriate button (e.g., **Punch In**, **Punch Out**).
4. Click Save.
5. Confirm that your punch was recorded successfully.

Job Aid: Recording a Break Using the Transfer Tile

Purpose:

Employees can record breaks using the **Transfer tile**, similar to clocking in or out for the day.



Key Points

- Recording a break works like a punch action.
- The system will **record and confirm** your break punch.
- The break will then display in your **timecard**.

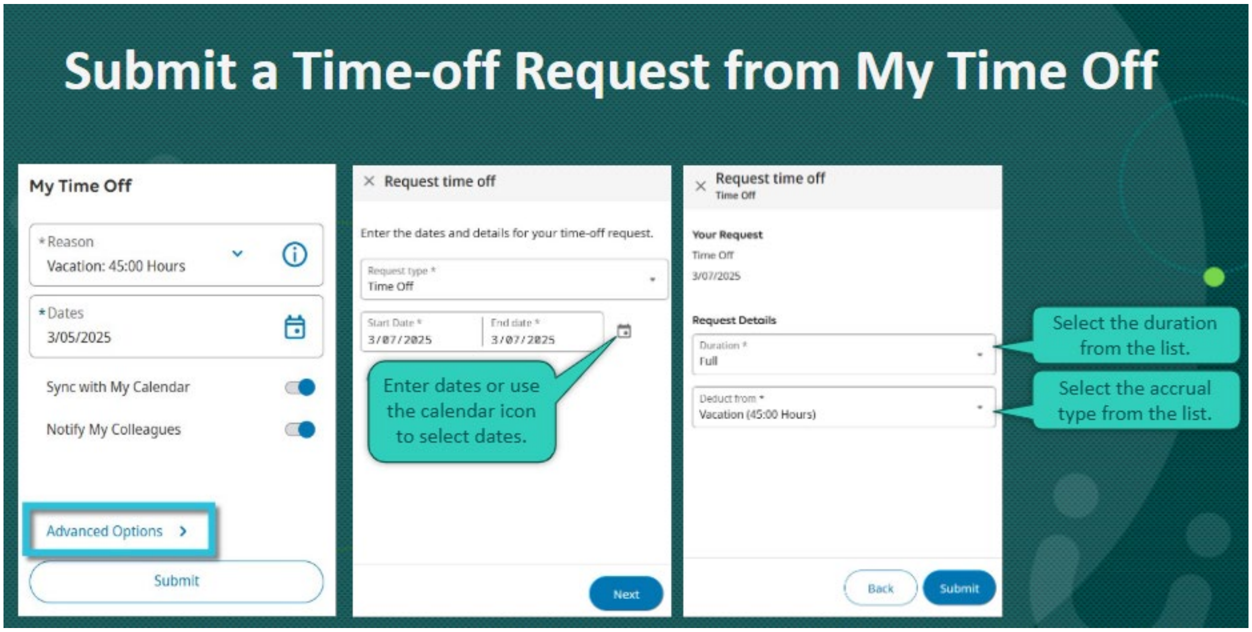
Steps to Record a Break

1. **Log in.**
2. Navigate to the **Transfer tile**.
3. **Select** the option to record a break.
4. Confirm the punch was successful.
5. Review your **timecard** to ensure the break is displayed correctly.

Job Aid: Requesting Time Off from My Time Off

Purpose:

Leave eligible Exempt and Non-exempt employees can request time off directly from the **Home page** using the **Time Off tile**.



Key Features

- The **Home page** contains tiles for common tasks, including **My Time Off**.
- Use **Advanced Options** in the **My Time Off** tile to:
    - Add comments
    - Select **Start Time and Hours** of duration
    - Choose a deduction paycode (eg. Sick/Annual).

Important Notes

- For partial days, select start time and only enter partial hours for duration (eg. 4 hours instead of 8 hours duration).

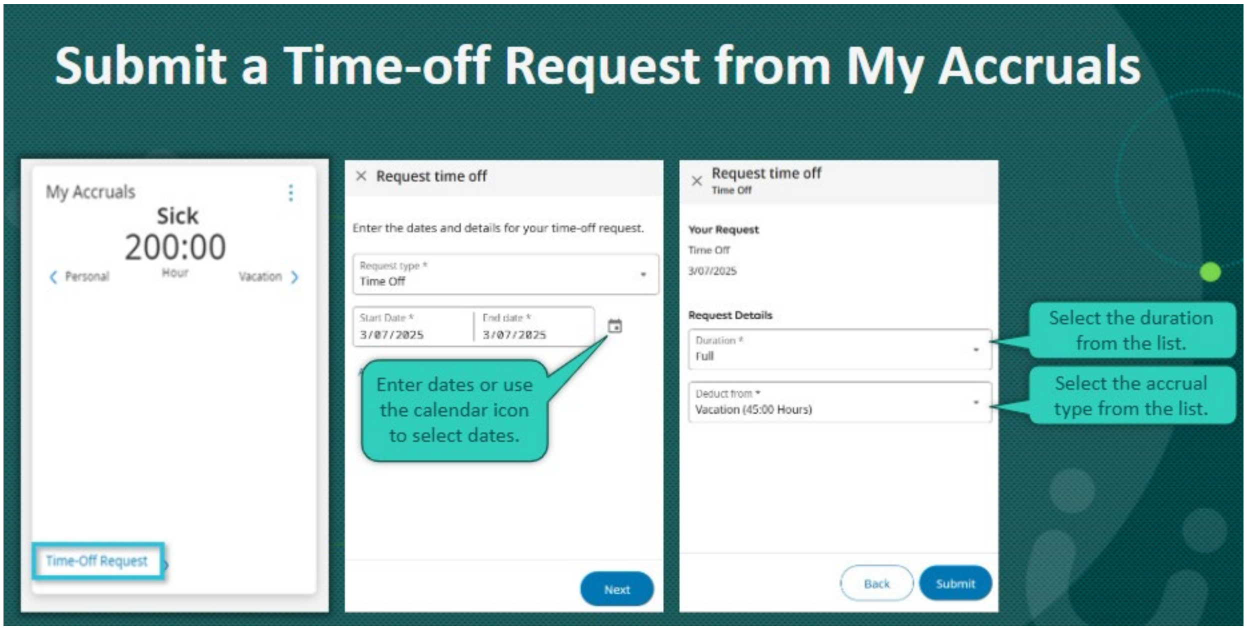
Steps to Request Time Off

1. **Log in.**
2. On the **Home page**, select the **Time Off tile**.
3. Enter your **dates and duration**.
4. Use **Advanced Options** for comments or special selections.
5. **Submit** your request.

Job Aid: Requesting Time Off Using My Accruals

Purpose:

Employees can request time off and view accrual balances using the **My Accruals** tile on the Home page.



Key Features

- The **Home page** contains tiles for common tasks, including **My Accruals** and **My Time Off**.
- Use **Advanced Options** in the **My Time Off** tile to:
  - Add comments
  - Select **Start Time and Hours** of duration
  - Choose a deduction paycode (eg. Sick/Annual).

Important Notes

- For partial days, select start time and only enter partial hours for duration (eg. 4 hours instead of 8 hours duration).

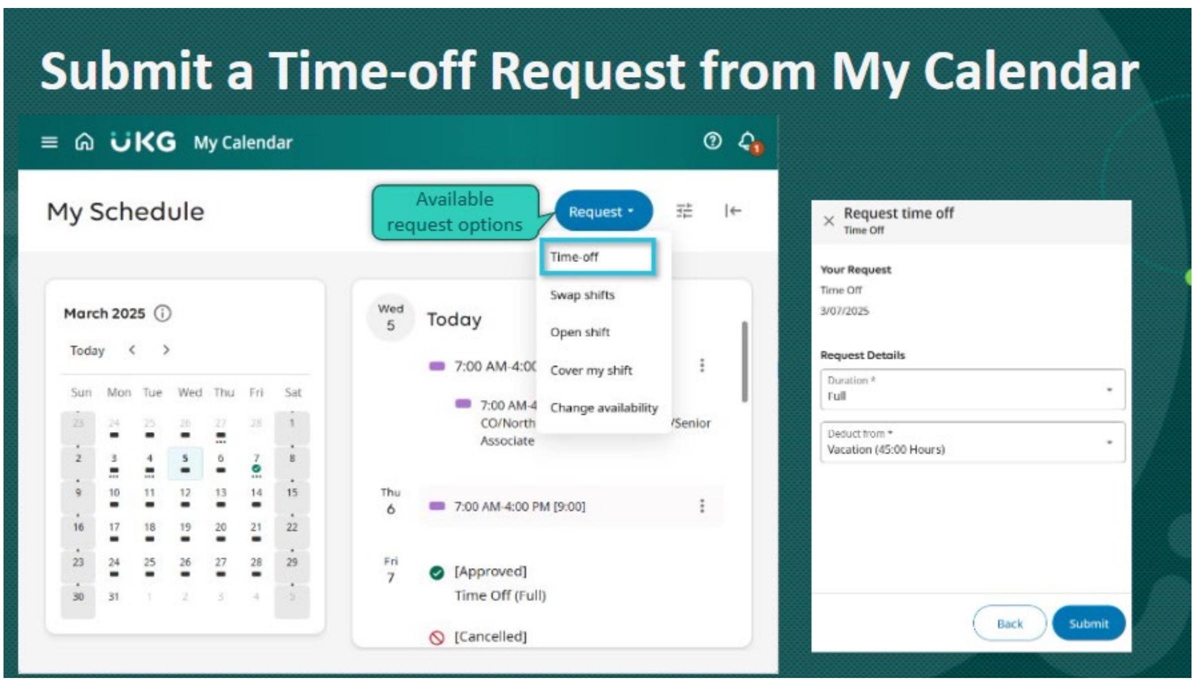
Steps to Request Time Off

1. **Log in.**
2. On the **Home page**, select the **My Accruals** tile.
3. Review your **available balances**.
4. Navigate to **My Time Off** to submit a request.
5. Enter your **dates and duration**.
6. Use **Advanced Options** for comments or special selections.
7. **Submit** your request.

Job Aid: Requesting Time Off Using My Calendar

Purpose:

Employees can request time off directly from the **My Calendar** page, which provides options for customizing your request.



Key Features

- **My Calendar** displays your schedule and allows you to request time off.
- Use **Advanced Options** to:
    - Add comments
    - Select **Start Time and Hours** of duration

- Choose a deduction paycode (eg. Sick/Annual).

Important Notes

- For partial days, select start time and only enter partial hours for duration (eg. 4 hours instead of 8 hours duration).

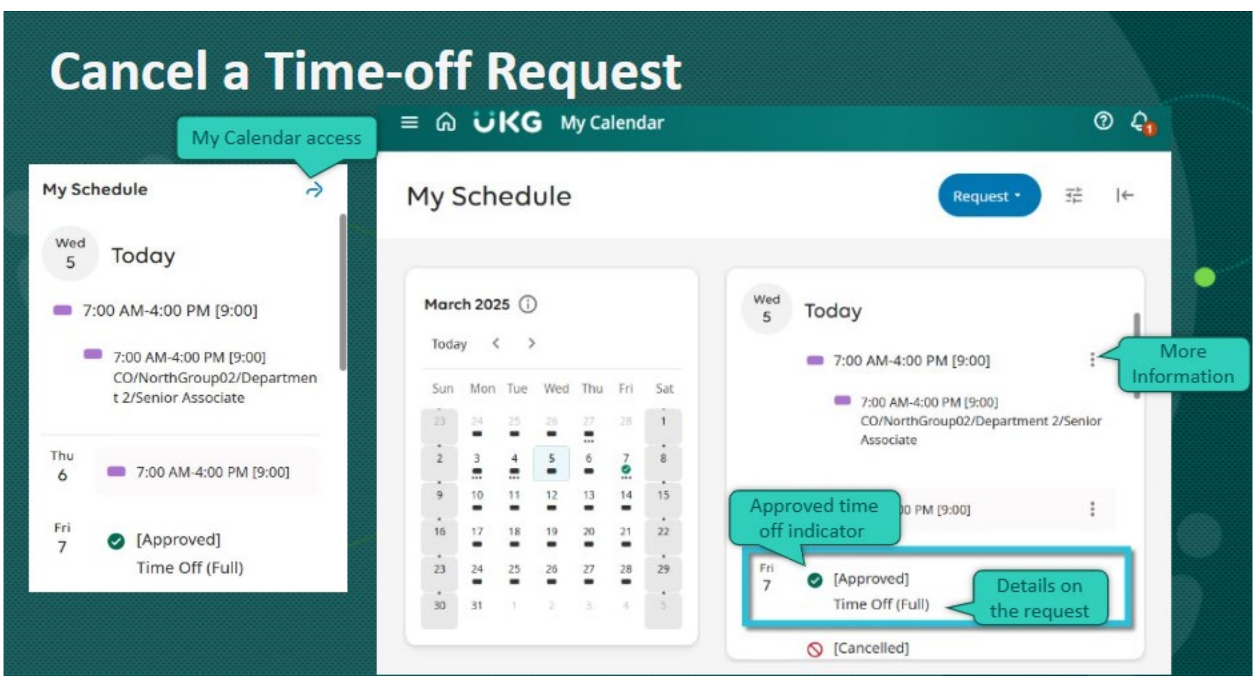
Steps to Request Time Off

1. **Log in**.
2. Navigate to **My Calendar**.
3. Select the date(s) for your time off.
4. Enter your **duration** and any **comments**.
5. Use **Advanced Options** for additional settings.
6. **Submit** your request.

Job Aid: Canceling a Time-Off Request

Purpose:

Employees can cancel a previously submitted and approved time-off request if plans change.

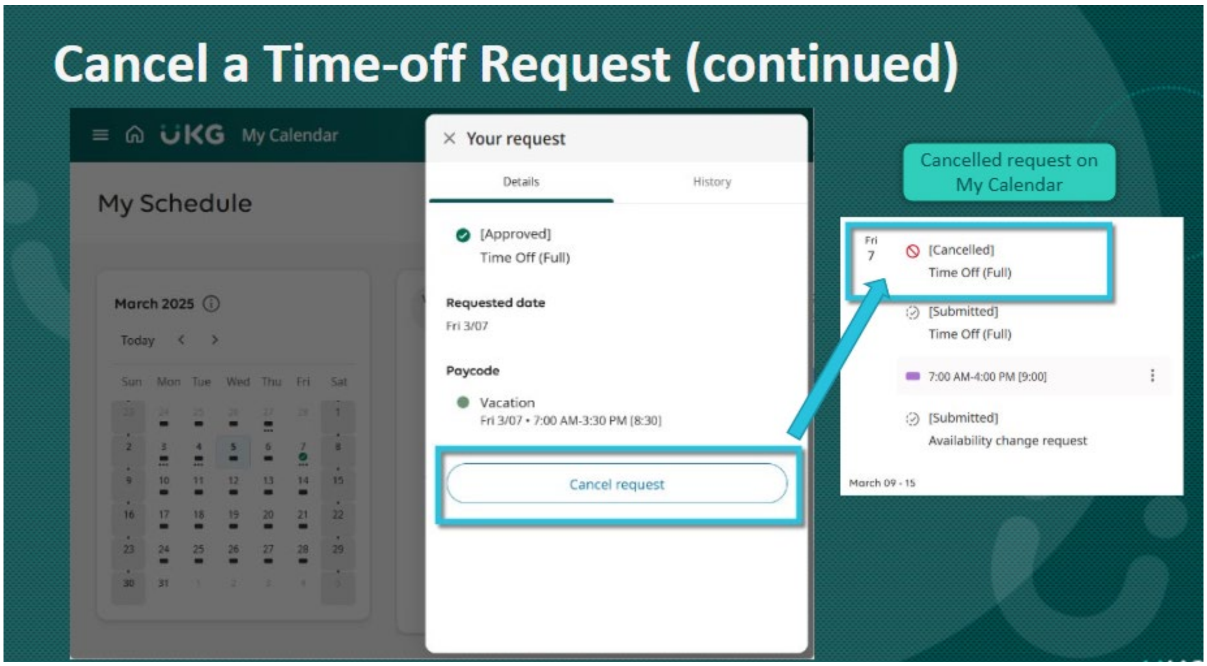


Key Points

- Canceling a request removes the approved time off from your schedule.
- You can only cancel requests that have been **approved** or are **pending**.

Steps to Cancel a Time-Off Request

1. **Log in.**
2. Navigate to the **My Schedule**
3. Locate the **approved or pending request** you want to cancel.
4. Select **Cancel Request**.
5. Confirm the cancellation.



Important Note

Cancellation is **immediate**; you will **not** be prompted to confirm.

Job Aid: Employees with Multiple Assignments

Home Page Tiles with Assignments

Several home page tiles are updated with assignment context for multiple assignment employees.

Employees see assignment drop-downs in home page tiles when they are configured with multiple assignments.

- **Punch** tile
    - The punch tile has an additional drop-down for multiple assignment employees, in which the employee can select which assignment they are punching in or out for. Transfers are also assignment aware, and if initiating a transfer, the slide out will display only transfers available within that assignment. If the employee selects a different assignment, they will see transfers available for that specific assignment.
- **My Schedule** tile
    - The **My Schedule** tile displays the employee's schedule with the assignment name right below. If multiple assignments are scheduled, they would see both assignments.
- **My Time Off** tile
    - The **My Time Off** tile has an additional drop-down for multiple assignments. Employees can request time off by assignment because pay codes are used to track time off.

Request Time Off by Assignment

Employees request time off by assignment by using a drop-down selection.

Note: If you have an **Exempt primary job and a non-exempt secondary job**, you will need to submit your leave requests timely to ensure your time is captured on the **biweekly pay cycle** throughout the month.

Navigation: Home Page > My Time Off tile

1. Select an **Assignment** from the drop-down.
2. Select a **Reason** from the drop-down
3. Select a date or range of dates by selecting the calendar icon.
4. Select **Apply**.
5. (Optional) Select **Advanced Options** to open the **My Time Off** slide out.
6. Select **Submit.**

The request has been submitted.

View Assignments in the Timecard

Employees see assignments in their timecard and in the Totals add-on.

Navigation: Main Menu > My Information > My Timecard

1. View the **Assignment** column in the timecard.
2. Select the **Totals** add-on.
3. Select or deselect the **Assignment Grouping** checkbox to group the totals by assignment.

Selecting the checkbox will add the Assignment column in the Totals add-on. Deselecting will remove the Assignment column.