

2025

# UKG/LoboTime 2.0

JOB AIDS

VERSION 1

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## **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:

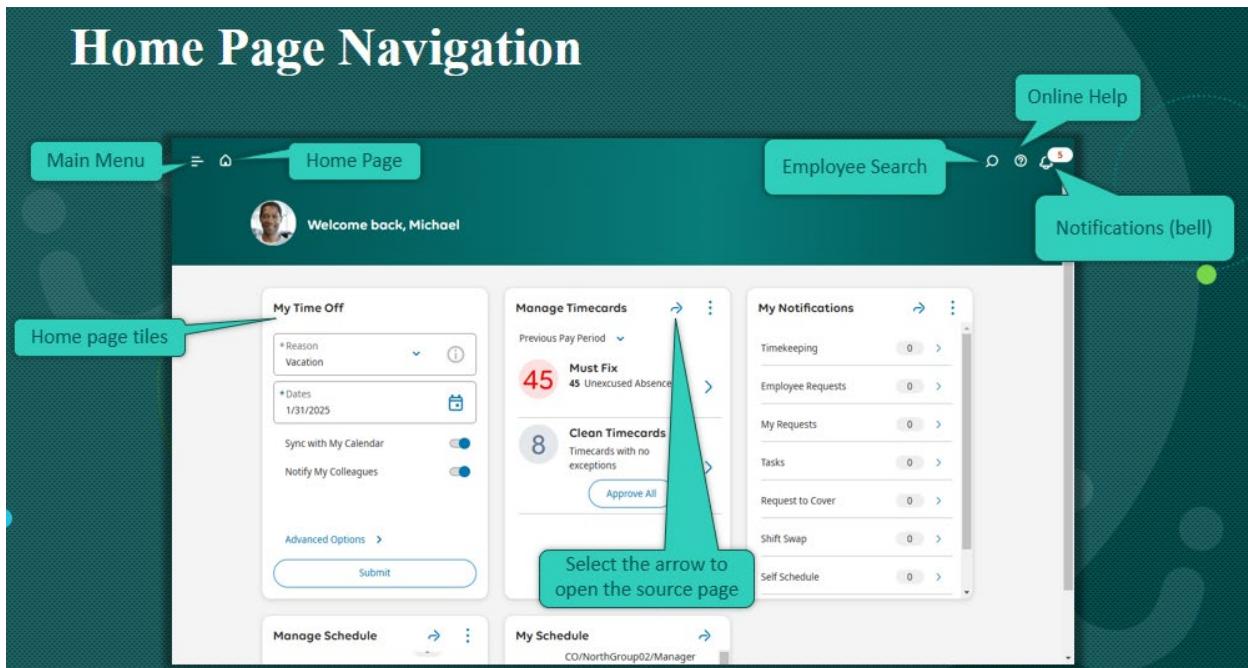
1. Search for “**UKG Pro**” in your device’s app store.
  - Icon: Dark green background with yellow lettering.
2. After downloading, the app will prompt you to connect to a **workspace**.
  - Copy and paste this link: [UKG PROD Login](#)
3. Sign in using **SSO** and set up **facial recognition** if desired.

### **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.

# Home Page Navigation



## Steps:

### 1. Use the Persistent Banner

- Main Menu:** Access timecards, Dataviews, and reports.
- Home Icon:** Return to the Home page.
- Employee Search:** Quickly find employees and access their records.
- Online Help:** Search for instructions.
- Notifications:** Click the bell icon to view alerts.

### 2. Explore Home Page Features

- View and customize tiles.
- Open source pages via tile arrows.
- Perform quick actions (e.g., submit time-off requests).

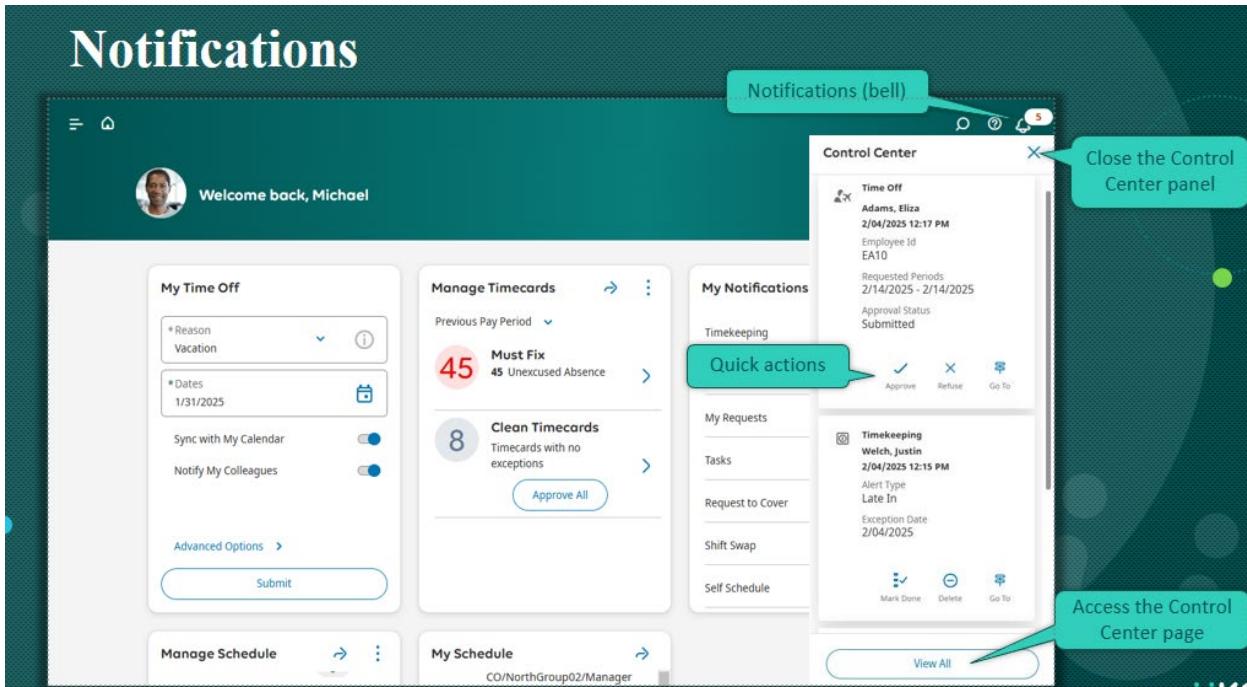
**Tip:** Use the banner for navigation and tiles for quick actions.

## Job Aid: Using the Control Center Panel

### Purpose:

Manage notifications and take quick actions without leaving the page.

# Notifications



## 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

- Select **Approve** or **Refuse** for time-off requests.
- 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

- Select **Mark Done** to remove the notification from the panel.
- 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.

The screenshot shows the UKG Control Center interface. On the left, a sidebar lists 'Categories' including Timekeeping, Employee Requests, My Requests, Tasks, Request to Cover, Shift Swap, Self Schedule, and Open Shift Requests. A 'Filters' section is located above the notification list. The main area is a 'Notification list' displaying four time-off requests. Each request card includes a checkbox, employee name, request type, dates, and status. To the right of the list is a 'Details panel' showing a summary of the first request (Time Off for Adams, Eliza) and links to 'Team Absences', 'Accruals', 'More Details', 'Modified Dates', 'Requested Dates', 'Paycodes', and 'Comments & Status Hist...'. At the top right are 'Available actions' buttons: Mark Done, Approve, Refuse, Add Comments, Pending, Edit, Cancel, Delete, and Go to. A 'Navigate to the schedule or timecard' callout points to the 'Go to' button in the details panel. A large green arrow points from the 'Notification list' to the 'Details panel'.

## 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.

The screenshot shows the UKG Employee Basic Summary Dataview. The interface includes a header with the UKG logo and navigation buttons for 'Employee Basic Summary', 'Available actions', 'Timeframe options', 'Save customizations', and a search bar. Below the header is a table with columns: Person Number, Name, Primary Location, Primary Job, Actual Worked Hours, Badge Number, and Incoming Requests Count. A 'Dataview selector' bubble points to the checkbox column. A 'Select multiple employees' bubble points to the checkbox for 'EA02'. A 'Column options' bubble points to the dropdown menu for 'Badge Number' with options: Sort Ascending, Sort Descending, Hide Column, Max, Min, Sum, and Avg. A 'Hide or display columns' bubble points to the 'Incoming Requests Count' column. A 'View and create Dataview charts' bubble points to the 'Charts' button at the bottom. The table data is as follows:

	Person Number	Name	Primary Location	Primary Job	Actual Worked Hours	Badge Number	Incoming Requests Count
<input type="checkbox"/>	EA02	Adams, Eliza	CO/NorthGroup02/Department 2	Senior Associate	42	Sort Ascending	
<input type="checkbox"/>	MA02	Adams, Molly	CO/NorthGroup02/Department 1	Senior Associate	42	Sort Descending	
<input type="checkbox"/>	PC02	Chu, Paul	CO/NorthGroup02/Department 2	Associate	42	Hide Column	
<input type="checkbox"/>	JW02	Welch, Justin	CO/NorthGroup02/Department 2	Associate	42	Max	
<input type="checkbox"/>	MG02	Garcia, Maria	CO/NorthGroup02/Department 3	Senior Associate	45	Min	
<input type="checkbox"/>	OA02	Adams, Olivia	CO/NorthGroup02/Department 1	Senior Associate	40	Sum	
<input type="checkbox"/>	DR02	Reyes, David	CO/NorthGroup02/Department 1	Associate	42	Avg	
<input type="checkbox"/>	RE02	Edwards, Ryan	CO/NorthGroup02/Department 2	Lead	45		
<input type="checkbox"/>	JD02	Devos, Julio	CO/NorthGroup02/Department 3	Associate	44:45		

### 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.

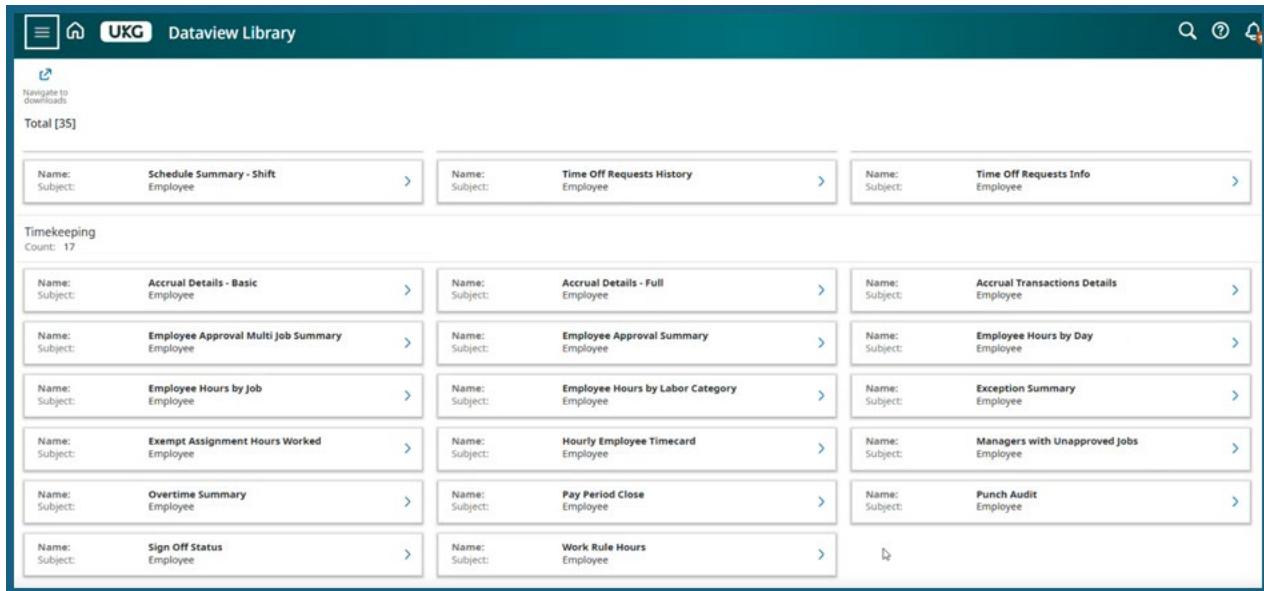
## Steps to Navigate a Dataview

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.



The screenshot shows the UKG DataView Library interface. At the top, there is a navigation bar with icons for home, search, and notifications, and the text 'UKG DataView Library'. Below the navigation bar, there is a link 'Navigate to downloads' and a status message 'Total [35]'. The main content area is a grid of 17 data view cards, each with a name, subject, and a right-pointing arrow. The cards are organized into two main sections: 'Timekeeping' (Count: 17) and 'Other' (Count: 18). The 'Timekeeping' section includes cards for 'Schedule Summary - Shift Employee', 'Time Off Requests History Employee', 'Time Off Requests Info Employee', 'Accrual Details - Basic Employee', 'Employee Approval Multi Job Summary Employee', 'Employee Hours by Job Employee', 'Exempt Assignment Hours Worked Employee', 'Overtime Summary Employee', 'Sign Off Status Employee', 'Accrual Details - Full Employee', 'Employee Approval Summary Employee', 'Employee Hours by Labor Category Employee', 'Hourly Employee Timecard Employee', 'Pay Period Close Employee', 'Work Rule Hours Employee', 'Accrual Transactions Details Employee', 'Employee Hours by Day Employee', 'Exception Summary Employee', 'Managers with Unapproved Jobs Employee', and 'Punch Audit Employee'. The 'Other' section is partially visible at the bottom of the grid.

## 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.

# Chart Tiles

The screenshot shows the UKG Employee Basic Summary interface. On the left, there is a table of employee data with columns for Person Number, Name, Primary Location, Primary Job, Actual Worked Hours, and Badge Number. On the right, there is a chart titled "Actual Worked Hours by Primary Location" showing the following data:

Primary Location	Actual Worked Hours
CO/North Group02/Department 1	08:30
CO/North Group02/Department 2	58:30
CO/North Group02/Department 3	25:30
CO/North Group02/Department 4	17:00

Below the chart is a "Charts" button. To the right, a "Tiles" panel is open, showing a list of tiles. It includes sections for "Standard (0)" and "My Charts (0)". A green callout box points to the "Existing charts" section, which contains a "Create Chart" button. The panel also has "Cancel" and "Apply" buttons at the bottom.

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## 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**.

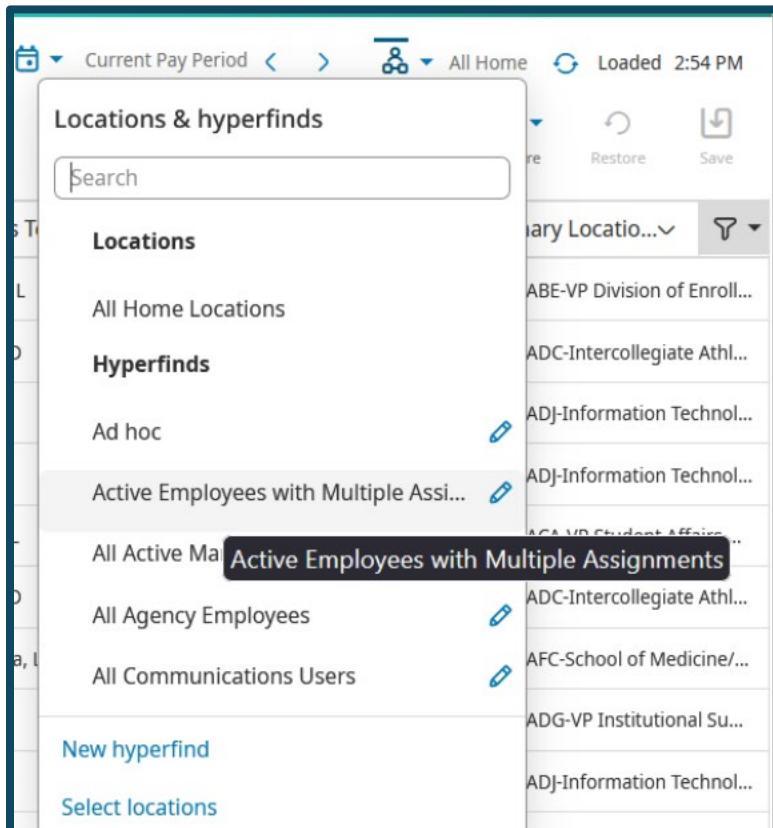
# Job Aid: Hyperfind Queries

## 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**.

Locations & hyperfnds

Search

None

**Locations**

All Home Locations

**Hyperfnds**

Ad hoc

Active Employees with Multiple A...

All Active Managers

All Agency Employees

**New hyperfind**

Select locations

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

Hyperfind editor

Area 1

Add description

Home employees  No  Yes  
This hyperfind is for home employees only.

Ad hoc  **NO**  Yes  
This hyperfind will be saved for later.

Visibility  Personal  Public  
Only you will be able to see this hyperfind.



Build your hyperfind by adding conditions here.

**Add conditions**

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.

## Select conditions

Filter 

› General Information

› Timekeeper

› Assignments

› Time Management

› Biometrics

› Scheduling

› Workforce Scheduler

› Attendance

› Accruals

› Leave

› User Information

› Role - Timekeeper

› Business Processes

› TeleTime IP

6. Click **Add**, then **Apply**.

- You can use the **Test Hyperfind** link in the bottom left to test if the parameters are working correctly.

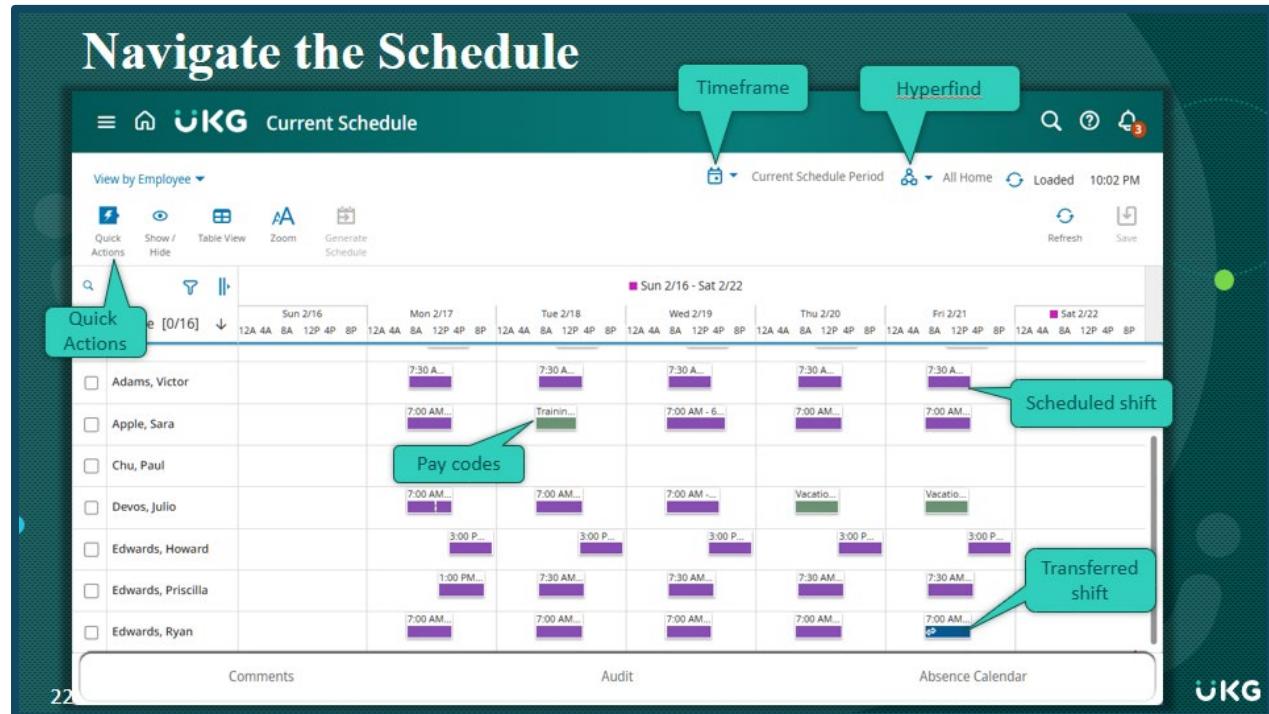
7. Review your selections and click **Save**.

- 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.



The screenshot shows the UKG Current Schedule interface. At the top, there are 'Timeframe' and 'Hyperfind' buttons. Below the header, there are 'Quick Actions' (Quick Actions, Show / Hide, Table View, Zoom, Generate Schedule), a search bar, and a date range (Current Schedule Period: Sun 2/16 - Sat 2/22). The main area is a 2-week grid of employee shifts. A green callout highlights the 'Quick Actions' button. Another green callout highlights the 'Pay codes' button. A third green callout highlights a 'Scheduled shift' for employee Apple, Sara. A fourth green callout highlights a 'Transferred shift' for employee Edwards, Ryan. The grid shows various shift patterns, including 7:30 AM to 4:00 PM and 3:00 PM to 12:00 AM. The footer includes 'Comments', 'Audit', and 'Absence Calendar' tabs.

## 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.

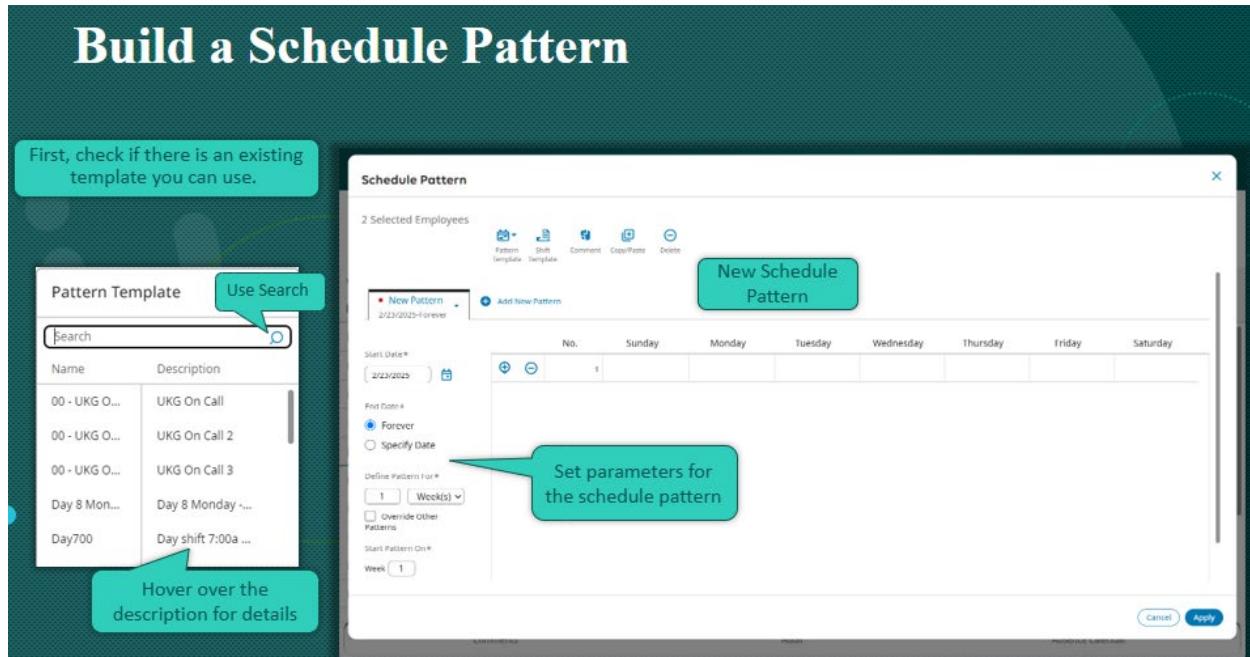
## Job Aid: Creating a Schedule Pattern

### 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

# Build a Schedule Pattern



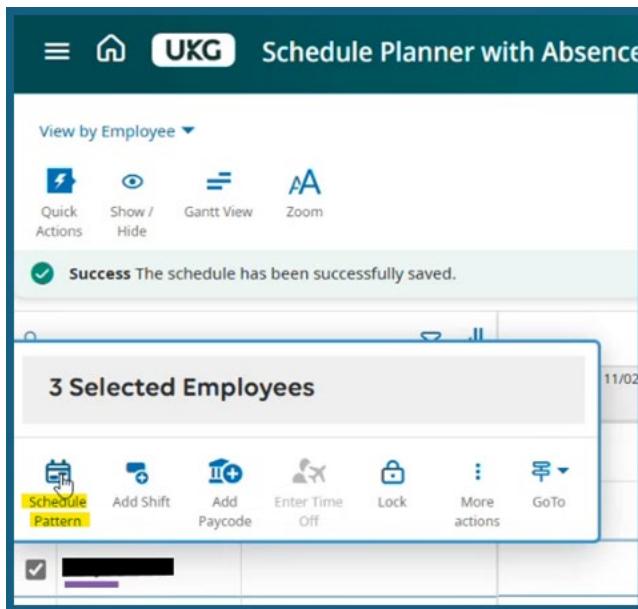
## Before You Begin

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

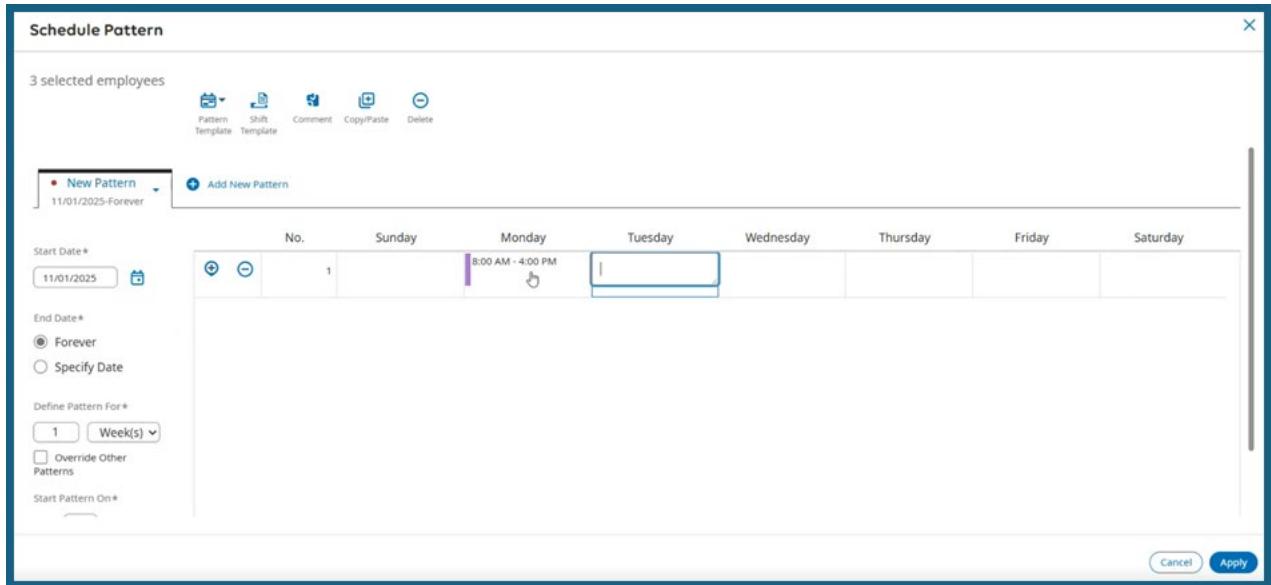
**Important Note:** The **start date** should reflect the beginning of the pattern, **not** the employee's hire date.

## 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

- 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:

- Forever or Specific date range.

Schedule Pattern

Copy/Paste Select a day to paste the items.

Pattern Shift Comment Copy/Paste Delete

New Pattern 11/10/2025-Forever Add New Pattern

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	8:00 AM - 4:00 PM						

Start Date \* 11/10/2025 End Date \* Forever

Define Pattern For \* 2 Week(s) Override Other Patterns

Start Pattern On \*

Cancel Apply

5. For patterns that repeat over a period of more than one week, you can:

- 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.

Schedule Pattern

Copy/Paste Select a day to paste the items.

Pattern Shift Comment Copy/Paste Delete

New Pattern 11/10/2025-Forever Add New Pattern

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	8:00 AM - 4:00 PM						
2	8:00 AM - 4:00 PM						

Start Date \* 11/10/2025 End Date \* Forever

Define Pattern For \* 2 Week(s) Override Other Patterns

Start Pattern On \*

Cancel Apply

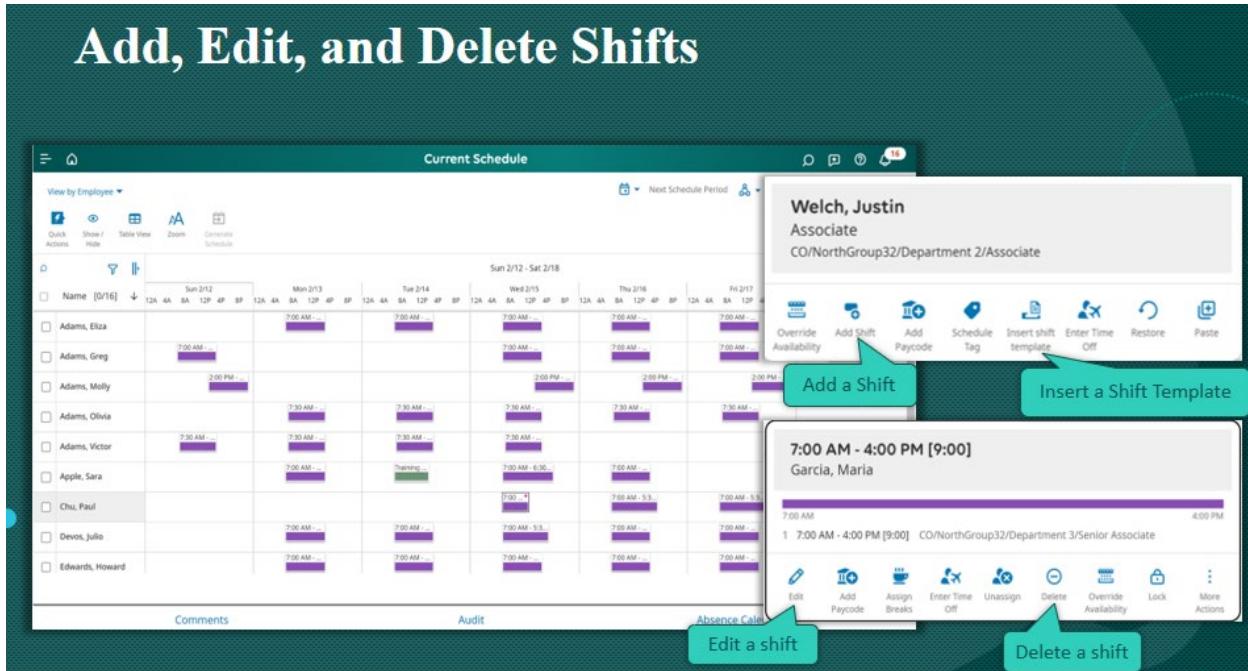
6. Apply work rules or shift templates as needed following the same instructions above.

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

- Expand the **Quick Actions** toolbar.
- Select the **Pay Code** icon.
- Choose the appropriate pay code.
- Select the shift(s) where the pay code should be applied.
- 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**.

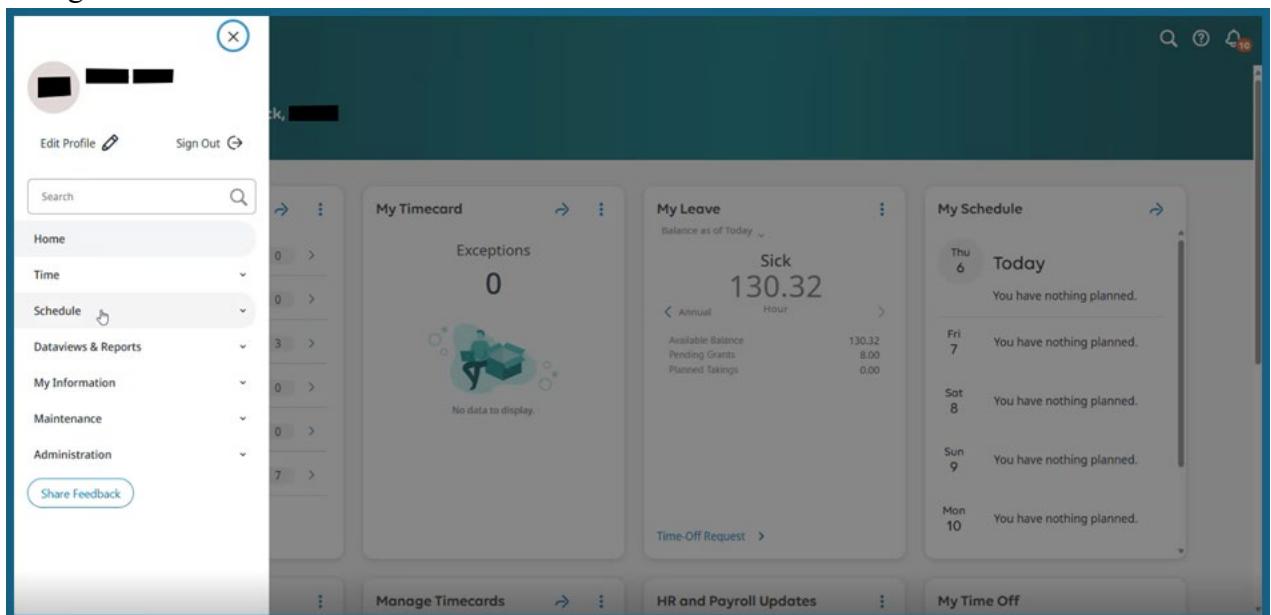
## Job Aid: Creating Ad Hoc Schedules

### Purpose

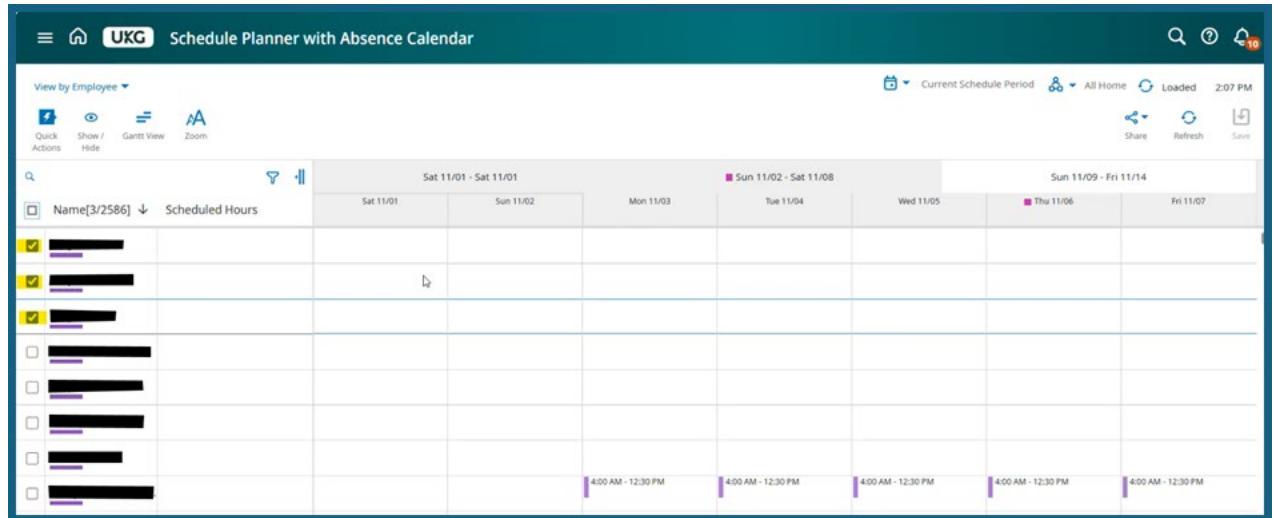
Add or edit schedules for individual employees on individual day(s) of the week. This is best used if you have non-repetitive schedules or need to make an ad hoc change to a particular day for an employee that already has a pattern assigned.

### Steps:

1. Navigate to Schedule.

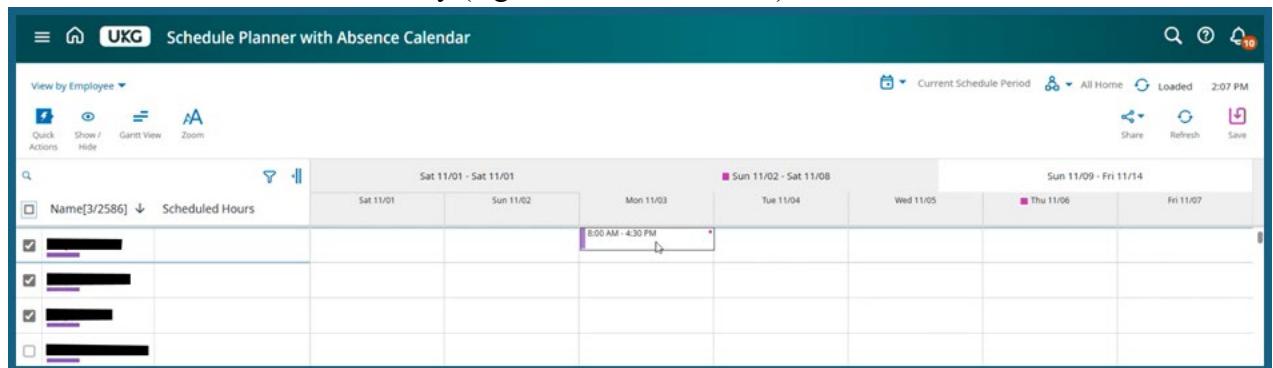


2. Select employee(s) without a schedule.



The screenshot shows the UKG Schedule Planner interface. At the top, there are navigation icons and a search bar. Below the search bar is a toolbar with 'Quick Actions' (Assign, Unassign, Insert Shift Transfer, Insert Shift Template, Comment, Paycode, Copy/Paste, Delete, Swap, Approve, Refuse, Cancel, and Quick Actions), 'Share', 'Refresh', and 'Save' buttons. The main area is a grid showing employee names and their scheduled hours across the days of the week. Each employee has a checkbox next to their name. The grid includes columns for Saturday (Sat 11/01), Sunday (Sun 11/02), Monday (Mon 11/03), Tuesday (Tue 11/04), Wednesday (Wed 11/05), Thursday (Thu 11/06), and Friday (Fri 11/07). Each day has a specific color-coded header: Saturday is light blue, Sunday is light green, Monday is light orange, Tuesday is light purple, Wednesday is light red, Thursday is light blue, and Friday is light green. The grid also includes time markers for 4:00 AM, 12:30 PM, and 4:30 PM.

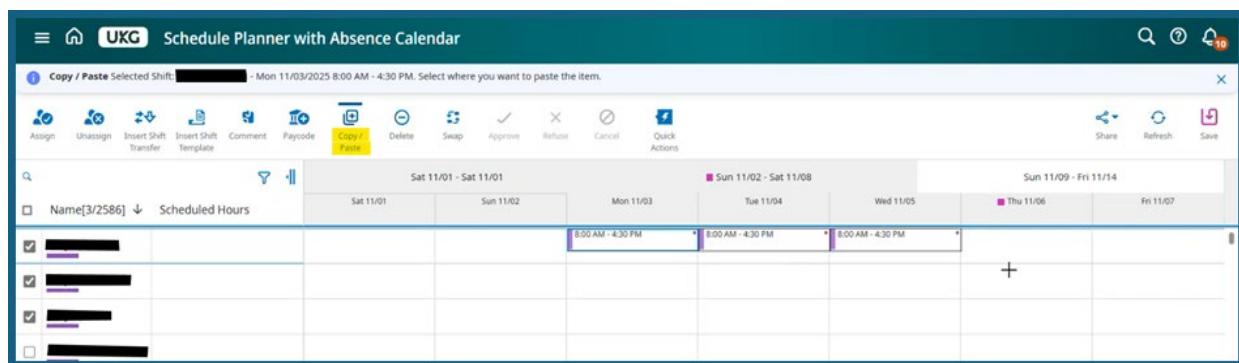
3. Enter start and end times manually (e.g., 8:00 AM–4:30 PM).



The screenshot shows the UKG Schedule Planner interface with a focus on a specific shift. A tooltip at the top left indicates 'Copy / Paste Selected Shift: [Employee Name] - Mon 11/03/2025 8:00 AM - 4:30 PM. Select where you want to paste the item.' The 'Copy/Paste' button in the toolbar is highlighted. The main grid shows employee names and their scheduled hours. A specific shift for an employee on Monday, November 3, 2025, is selected and has its start and end times (8:00 AM - 4:30 PM) highlighted with a blue selection box. The rest of the grid shows other employees and their scheduled hours for the week.

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.



The screenshot shows the UKG Schedule Planner interface with a 'Copy / Paste' dialog box open. The dialog box contains the text 'Copy / Paste Selected Shift: [Employee Name] - Mon 11/03/2025 8:00 AM - 4:30 PM. Select where you want to paste the item.' Below the text are several quick action icons: Assign, Unassign, Insert Shift Transfer, Insert Shift Template, Comment, Paycode, Copy/Paste (highlighted in yellow), Delete, Swap, Approve, Refuse, Cancel, and Quick Actions. The main grid shows employee names and their scheduled hours. A specific shift for an employee on Monday, November 3, 2025, is selected and has its start and end times (8:00 AM - 4:30 PM) highlighted with a blue selection box. The rest of the grid shows other employees and their scheduled hours for the week.

- 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.

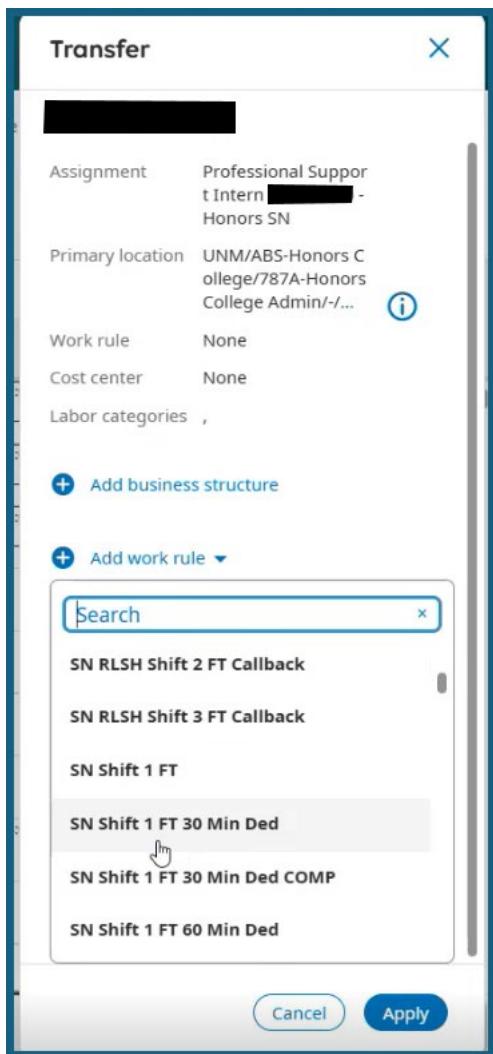
### Steps:

1. Right-click the shift → Edit.

2. Select Transfer Employee.

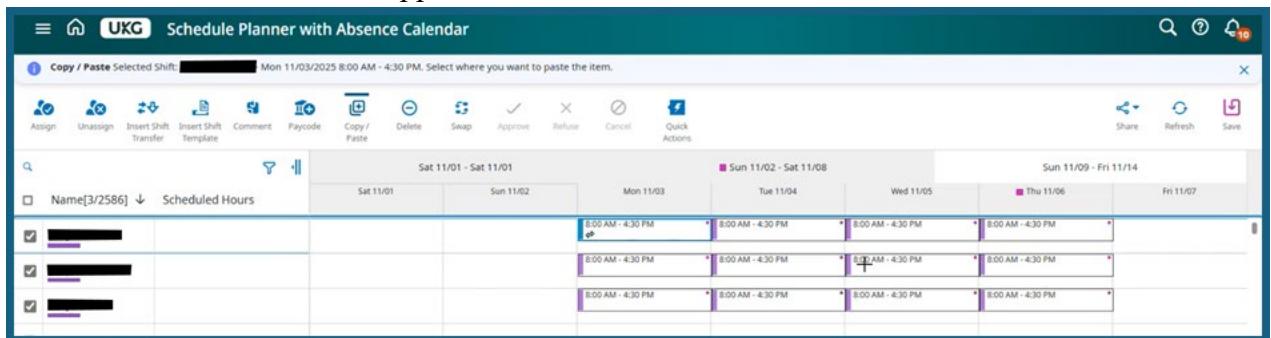
3. Click on “Add Work Rule”
4. Choose the correct work rule (e.g., SN Shift 1 Full Time – 30 min lunch deduct).

**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.



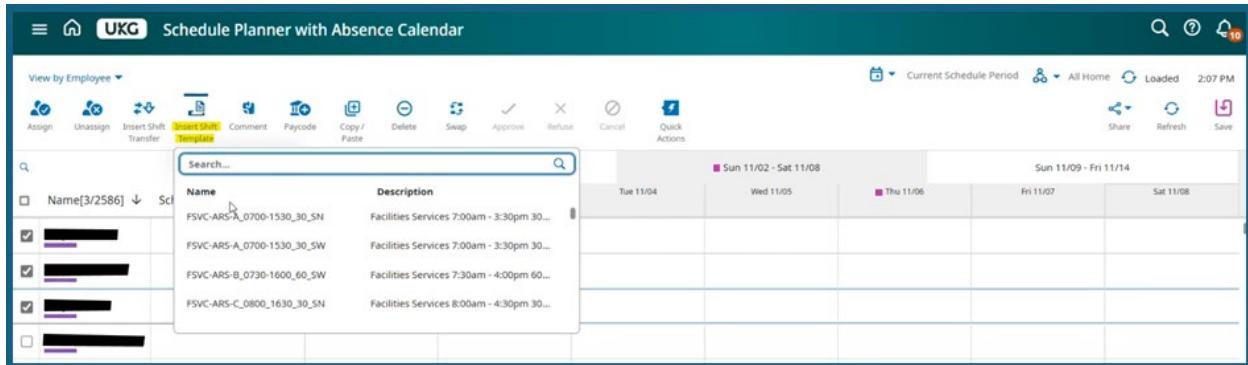
# Job Aid: Using Shift Templates

## 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](mailto: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.

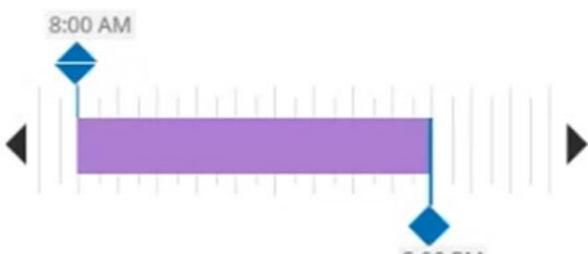
### Steps:

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

### Edit Shift

Employee Name  
[Redacted]

Assignment  
...72-00 - Honors SN ⓘ  
[Redacted]

8:00 AM  5:00 PM

[+ Add Segment](#)

**Regular** [9.00] [⋮](#)

Start Time 8:00 AM End Time 5:00 PM Date 11/03

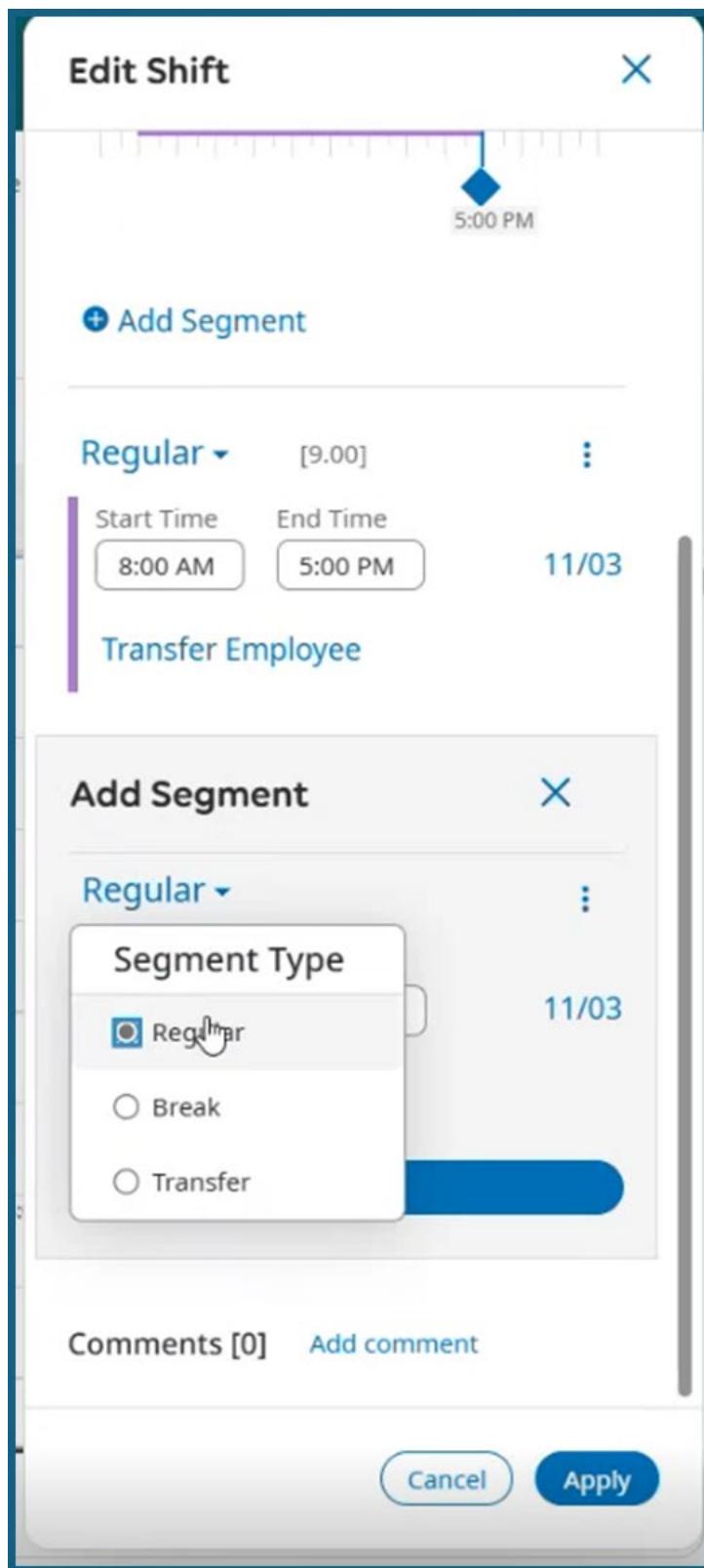
[Transfer Employee](#)



Comments [0] [Add comment](#)

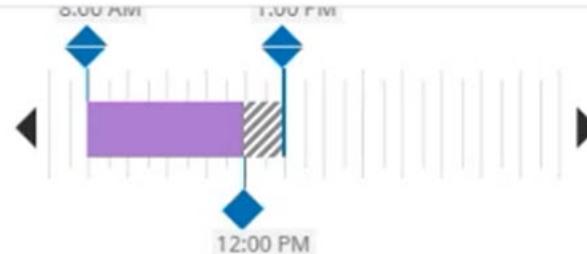
[Cancel](#) [Apply](#)

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.

### Edit Shift



[+ Add Segment](#)

**Regular** [4.00] [⋮](#)

Start Time: 8:00 AM End Time: 12:00 PM Date: 11/03

[Transfer Employee](#)

[+](#)

**Break** [1.00] [⋮](#)

Start Time: 12:00 PM End Time: 1:00 PM Date: 11/03

[+](#)

Comments [0] [Add comment](#)

[Cancel](#) [Apply](#)

5. Add the next segment for remaining work hours.

**Edit Shift** X

Start Time: 8:00 AM   End Time: 12:00 PM   Date: 11/03

[Transfer Employee](#)

[+](#)

**Break** [1.00] ⋮

Start Time: 12:00 PM   End Time: 1:00 PM   Date: 11/03

**Add Segment** X

**Regular** [4.00] ⋮

Start Time: 1:00 PM   End Time: 5:00 PM   Date: 11/03

[Transfer Employee](#) (1)

**Add**

Comments [0] [Add comment](#)

[Cancel](#) [Apply](#)

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.

The screenshot shows a weekly shift schedule from Saturday, November 1, to Saturday, November 8. A specific shift on Monday, November 3, from 8:00 AM to 5:00 PM is selected for editing. A tooltip indicates 'This item has unsaved changes\*'. The shift is assigned to 'Professional Support Intern' with the index '8:00 AM - 5:00 PM (9.00)'. The details for this shift are listed as follows:

1. 8:00 AM	[4.00]: <b>Regular</b>	UNM/ABS-Honors College/787A-Honors College
		Admin/-/-/Professional Support Intern
2. 12:00 PM	[1.00]: <b>Break</b>	
3. 1:00 PM	[4.00]: <b>Regular</b>	UNM/ABS-Honors College/787A-Honors College
		Admin/-/-/Professional Support Intern

## 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:

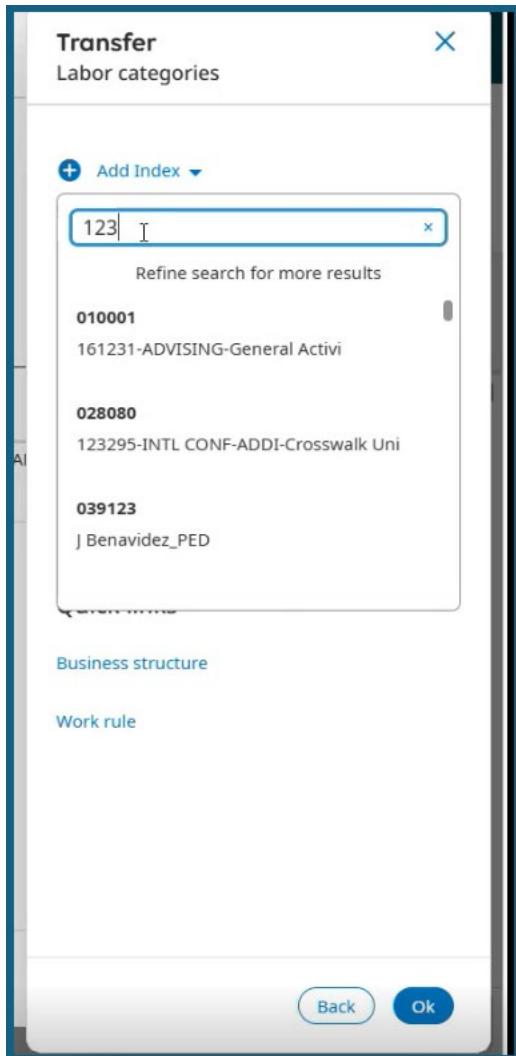
If you don't assign the index during scheduling before an employee punches in/out, you will need to:

- 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.

	Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	Shift	Daily
+	Sat 11/15												
+	Sun 11/16												
+	Mon 11/17			8:17 AM	5:15 PM							8.90	8.90
+	Tue 11/18	8:10 AM - 5:10 PM		8:17 AM	5:15 PM							9.00	9.00

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

Rule analysis report

Pay rule (1)

SN Shift 1 FT

Extensions

1 of 5

In progress	Projected	From schedule
Yes	No	No

Regular Shift (1)

Start: 8:18 AM [8:17 AM]

End: 4:30 PM

Amount: 8.20

Apply date: 11/17/2025

- **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**.

Rule analysis report X

✓ Pay rule (1)

SN Shift 1 FT

› Extensions

< 2 of 5 >

In progress	Projected	From schedule
No	No	No

✓ Regular Shift (3)

Start  
8:16 AM [8:17 AM]

End  
4:30 PM

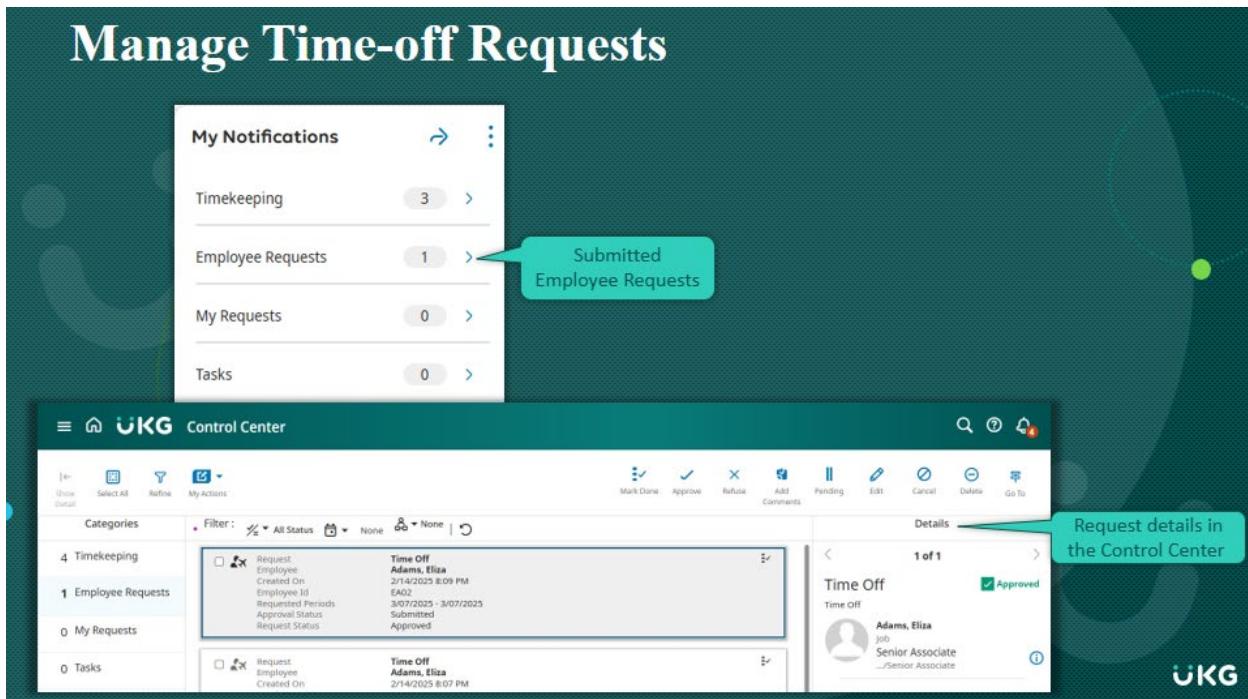
Amount  
8.23

Apply date  
11/18/2025

## 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

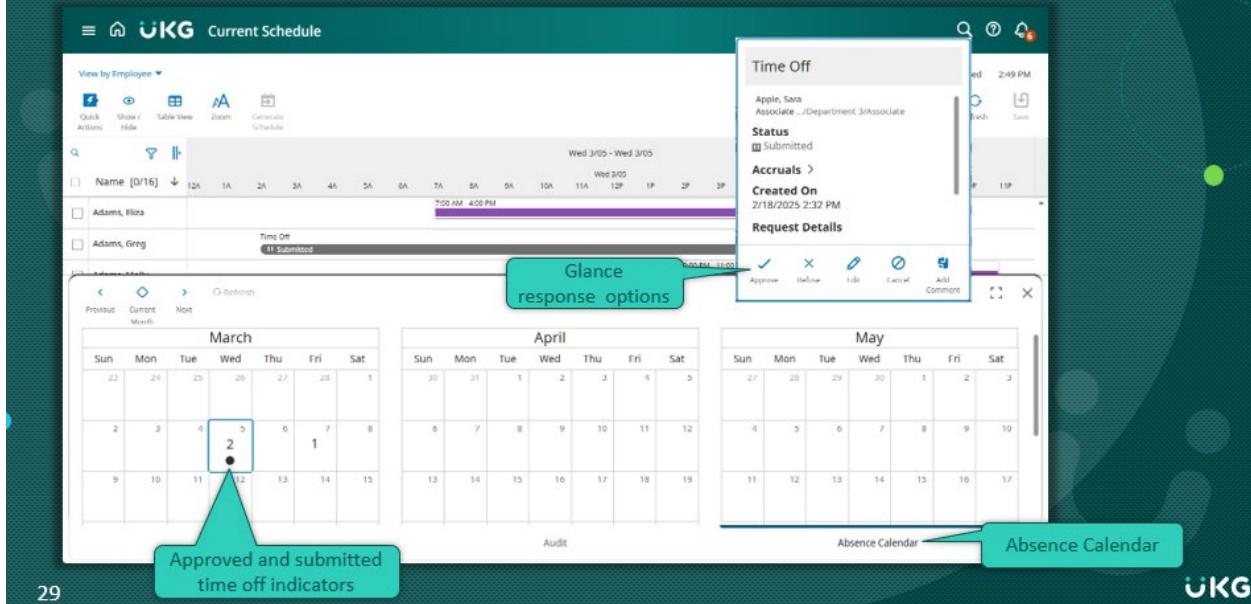
- 1. Access the Control Center**
  - From the **Home page**, select the **My Notifications** tile and click **Employee Requests**.
  - OR click the **Notifications (bell)** icon and select the **Time Off** notification.
- 2. Review Details**
  - Check **Accruals** and other relevant information in the **Details** pane.
- 3. Take Action**
  - 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.

# Absence Calendar



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Glance response options

Approved and submitted time off indicators

Absence Calendar

Absence Calendar

UKG

## 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.

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Welcome back, Michael

Manage Schedule

2/22/2025 • Last Update 9:17 PM

Starting: 0 >

Missing: 0 >

On Break: 0 >

Leaving: 0 >

My Notifications

Timekeeping: 3 >

Employee Requests: 0 >

My Requests: 0 >

Tasks: 0 >

Request to Cover: 0 >

Shift Swap: 0 >

Self Schedule: 0 >

Manage Timecards

Previous Pay Period

Must Fix: 2

1 Missed Out Punch  
1 Unexcused Absence

Need Review: 1

1 Early Out

Mark as Reviewed

Clean Timecards: 13

Timecards with no exceptions

Approve All

Access all employee timecards

Pay Period Menu

Errors in the timecards

Potential errors

Approve Clean Timecards

## 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

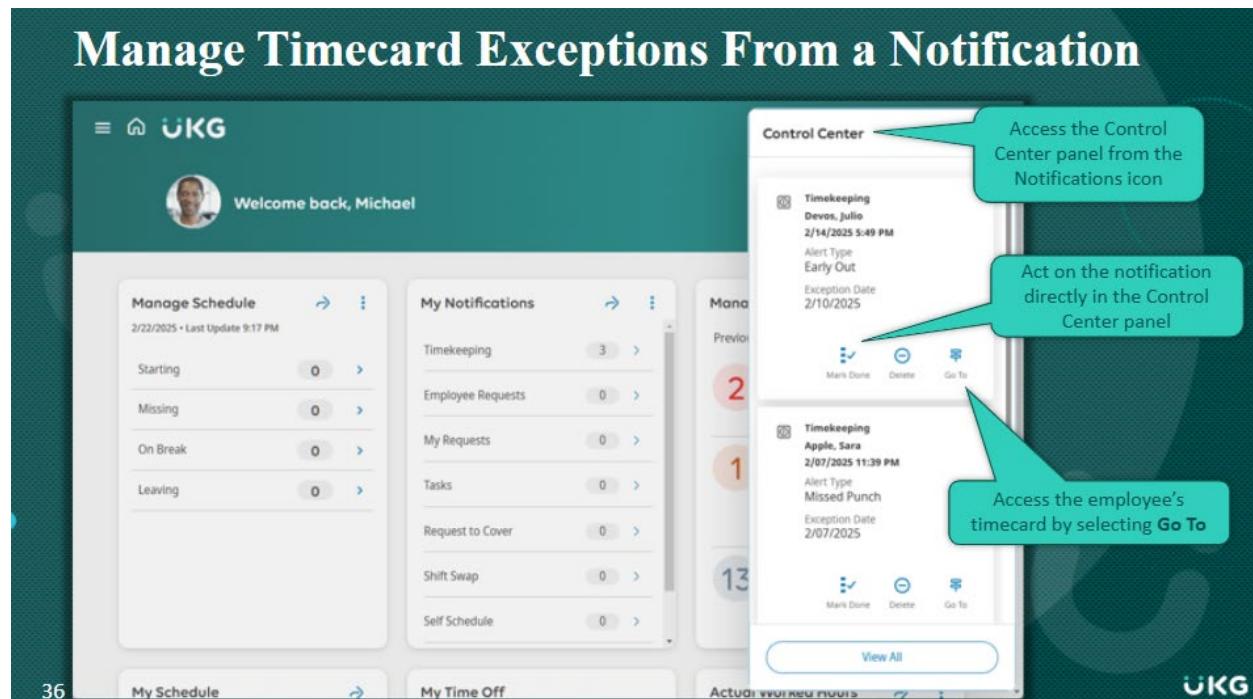
1. Go to the **Home Page** and locate the **Manage Timecard** tile.

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.



**Manage Timecard Exceptions From a Notification**

Access the Control Center panel from the Notifications icon

Act on the notification directly in the Control Center panel

Access the employee's timecard by selecting Go To

### 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.

# Navigate the Timecard

Employee Timecards

Timecard tools

Employee Punches

Exceptions

Scheduled time

Shift, Daily, and Pay Period Totals

Go To

Schedule

People

Reports

UKG

## 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:

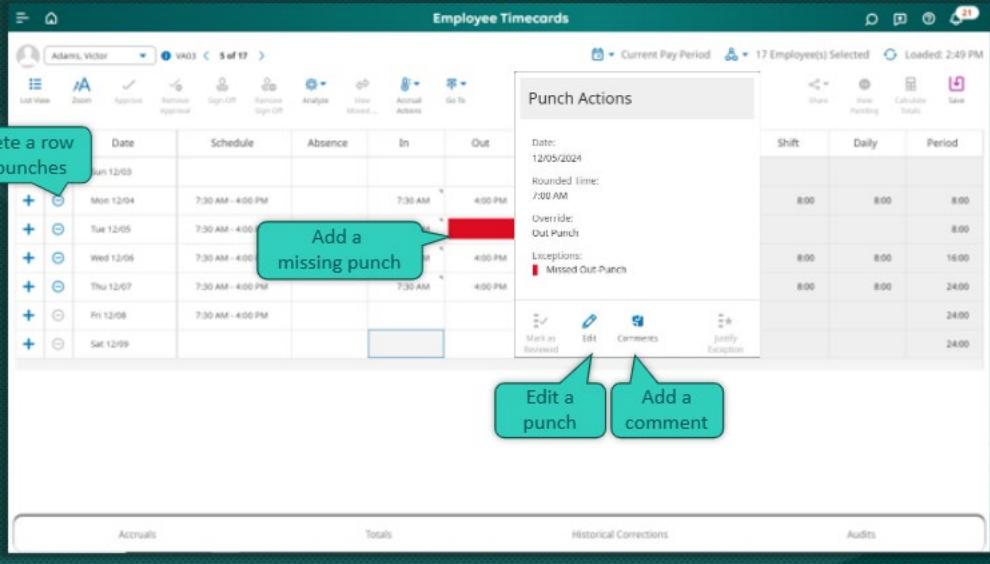
- **Accruals Balances**
- **Timecard Totals** for the selected timeframe
- **Timecard Audits**

# Job Aid: Managing Punches in Employee Timecards

## Purpose

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

### Hourly Timecards: Adding, Editing, Deleting Punches



The screenshot shows the 'Employee Timecards' software interface. The main area displays a grid of punches for an employee named Adams, Victor, on December 5, 2024. The grid columns are Date, Schedule, Absence, In, and Out. A red callout box labeled 'Delete a row of punches' points to the delete icon in the header toolbar. A green callout box labeled 'Add a missing punch' points to a red cell in the grid. Another green callout box labeled 'Edit a punch' points to a cell with a black triangle. A third green callout box labeled 'Add a comment' points to a comment icon in the grid. The top right of the screen shows a summary of 17 employees selected, the current pay period, and the date loaded (2:49 PM). The bottom of the screen has tabs for Accruals, Totals, Historical Corrections, and Audits.

## 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

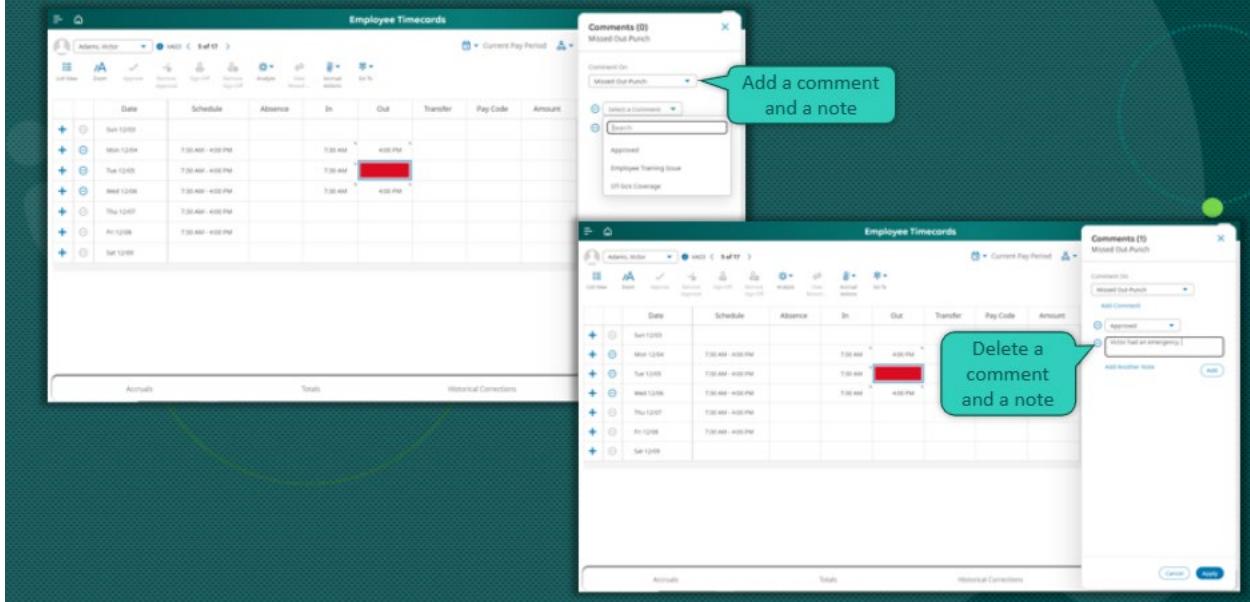
- a. Click **Save** to finalize updates.

## 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.

## Add and Delete Comments



### Steps to Add Punches and Comments

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

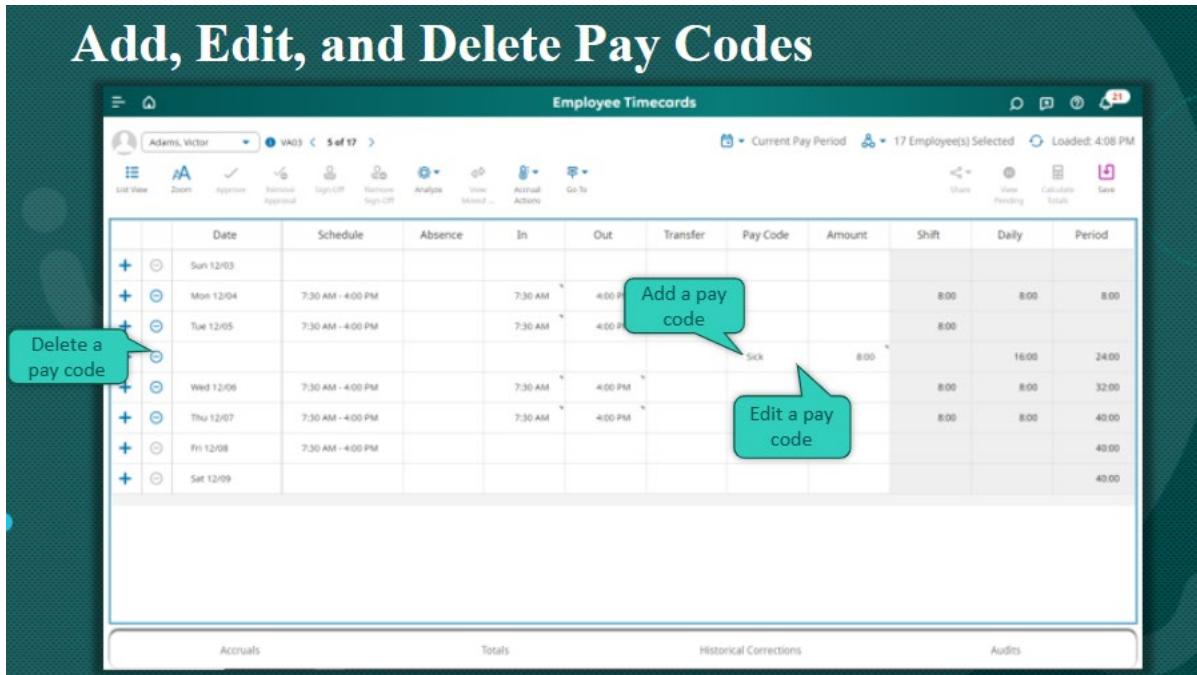
## Job Aid: Adding and Managing Pay Codes in Timecards

### 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.

## Add, Edit, and Delete Pay Codes



The screenshot shows the Employee Timecards software interface. The main window displays a grid of timecard data for an employee named Adams, Victor. The columns include Date, Schedule, Absence, In, Out, Transfer, Pay Code, Amount, Shift, Daily, and Period. A speech bubble points to the 'Pay Code' column with the text 'Add a pay code'. Another speech bubble points to the 'Pay Code' column of a specific row with the text 'Edit a pay code'. A third speech bubble points to the delete icon in the first column of a row with the text 'Delete a pay code'.

	Date	Schedule	Absence	In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
+	Sun 12/03										
+	Mon 12/04	7:30 AM - 4:00 PM		7:30 AM	4:00 PM				8:00	8:00	8:00
+	Tue 12/05	7:30 AM - 4:00 PM		7:30 AM	4:00 PM				8:00		
+	Wed 12/06	7:30 AM - 4:00 PM		7:30 AM	4:00 PM				8:00	8:00	32:00
+	Thu 12/07	7:30 AM - 4:00 PM		7:30 AM	4:00 PM				8:00	8:00	40:00
+	Fri 12/08	7:30 AM - 4:00 PM									40:00
+	Sat 12/09										

## 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

- Click the pay code cell.
- Choose the appropriate pay code from the list.

### 4. Enter Amount

- Specify the number of hours or duration.

### 5. Save Changes

- Click **Save**.

### 6. Review Totals

- Confirm the employee's totals for the time period.

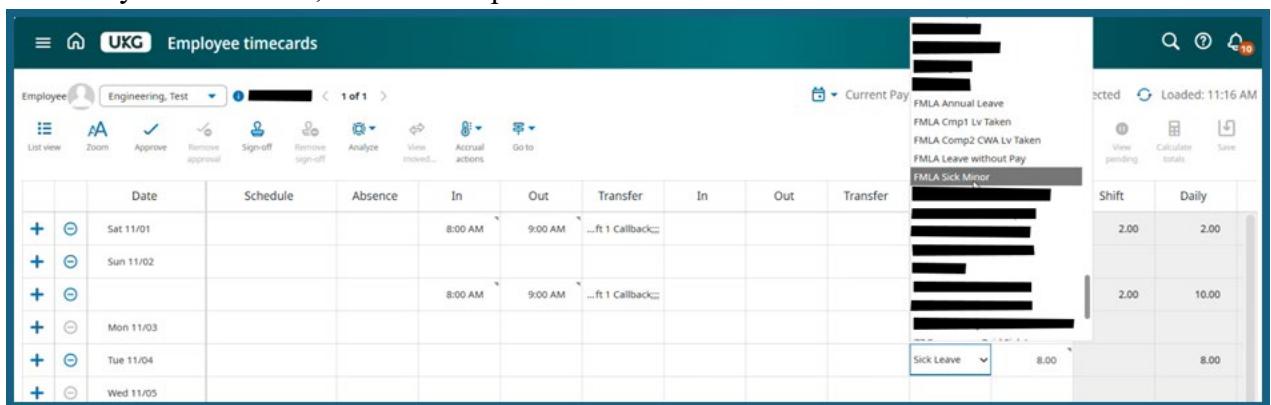
## Job Aid: Entering FMLA on Timesheets

### 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.



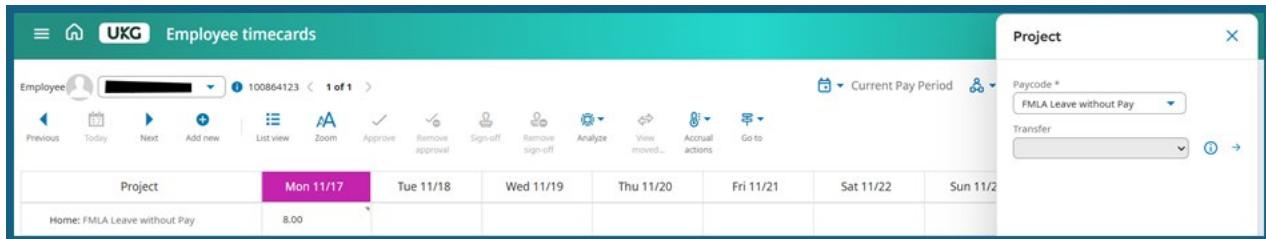
The screenshot shows the UKG Employee Timecards interface. The top navigation bar includes the UKG logo, a search bar, and a notification icon. The main area is titled 'Employee timecards' and shows a table of timecard entries for an employee named 'Engineering, Test'. The table columns are Date, Schedule, Absence, In, Out, Transfer, In, Out, and Transfer. The 'Absence' column for Tuesday, November 04, contains the value '8:00 AM - 9:00 AM ... ft 1 Callback'. To the right of the table, a dropdown menu is open, listing several FMLA pay codes: 'FMLA Annual Leave', 'FMLA Cmp1 Lv Taken', 'FMLA Cmp2 CWA Lv Taken', 'FMLA Leave without Pay', and 'FMLA Sick Minor'. The 'FMLA Sick Minor' option is highlighted. On the far right, there are buttons for 'View pending', 'Calculate totals', and 'Save'. Below the table, there are 'Shift' and 'Daily' summary tables showing hours worked.

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**.



The screenshot shows the UKG Employee Timecards interface with the timecard table. The entry for Tuesday, November 04, now has the 'Absence' field populated with '8:00 AM - 9:00 AM ... ft 1 Callback' and the 'Pay Code' field set to 'FMLA Sick Mi...'. The 'Hours' field shows '8.00' and the 'Total' field also shows '8.00'.

**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.



The screenshot shows the UKG Employee timecards interface. At the top, it displays the employee number 100864123 and the date 1 of 1. The main area is a grid for entering time. The first row is labeled 'Project' and shows the date 'Mon 11/17'. The cell for 'Mon 11/17' contains the value '8.00'. To the right of the grid, there is a 'Project' sidebar with a dropdown for 'Paycode' set to 'FMLA Leave without Pay'. Other options in the sidebar include 'Transfer' and a 'Transfer' dropdown.

## 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.



The screenshot shows the UKG Employee timecards interface. The paycode is set to 'Paid Parental Leave'. The table shows hours worked for Wednesday, November 11th, at 8.00. The 'Paid Parental Leave' paycode is also selected in the dropdown menu at the bottom right of the screen.

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:

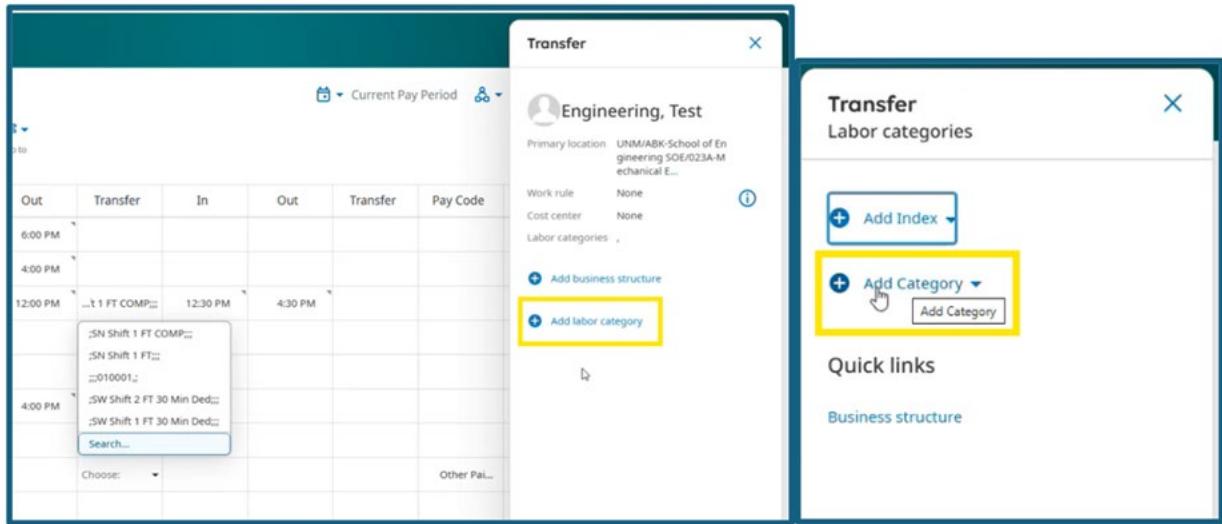
- **University or Branch Closure** – When the University is officially closed by the President (e.g., inclement weather, national emergency).
- **Education Leave** – Approved time for professional development or training.
- **Time Off for Interviews** – Reasonable time off for University job interviews 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**.

Pay Code	Amount	Shift
Other Pai...	2	I

- 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).

Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	S
Sat 11/01											
Sun 11/02											
Mon 11/03			8:00 AM	4:00 PM	...010001..						
Tue 11/04			8:00 AM	12:00 PM		12:01 PM	4:00 PM	...010001..			
Wed 11/05			8:00 AM	6:00 PM							
Thu 11/06			8:00 AM	4:00 PM							
Fri 11/07			8:00 AM	12:00 PM	...t 1 FT COMP...	12:30 PM	4:30 PM				

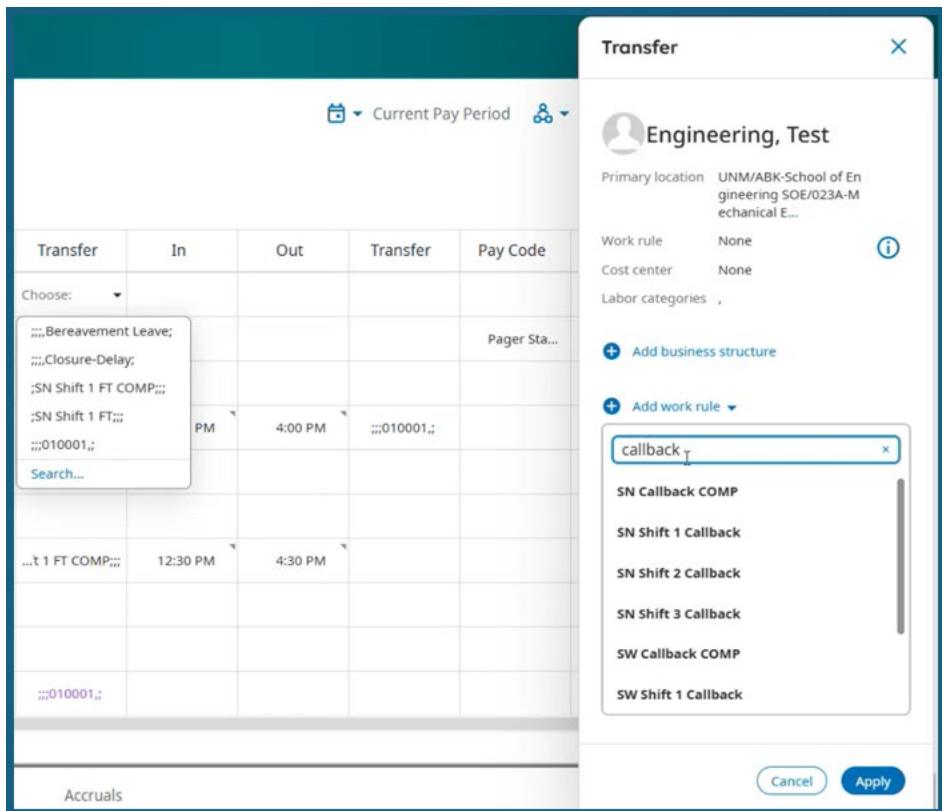
- Enter hours in **the Amount** column (e.g., 8 hours).
- Click **Save**.

### 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.

	Date	Schedule	Absence	In	Out
<b>+</b> <b>-</b>	Sat 11/01			8:00 AM	9:00 AM
<b>+</b> <b>-</b>	Sun 11/02			8:00 AM	
<b>+</b> <b>-</b>	Mon 11/03			8:00 AM	4:00 PM

- 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:  

$$\text{FTE} \times 8 \text{ Holiday Hours} = \text{Part-time Employee's Holiday Hours Earned}$$
  - e.g.,  $0.6 \text{ FTE} \times 8 = 4.8 \text{ hours}$
- 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												
+	Thu 12/25												
+	Fri 12/26												

⌚ Winter Br...	⌚ Winter Br...	8.00	8.00
⌚ Winter Br...	⌚ Winter Br...	8.00	8.00
⌚ Winter Br...	⌚ 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.

# Work with Exceptions

41

**Punch Actions**

Date: 1/20/2025  
Time: 7:00 AM  
Rounded Time: 7:00 AM  
Override: In Punch  
Time Zone: (GMT -05:00) Eastern Time (USA; Canada)  
Exceptions: Early In  
Last Edit Date: 3/04/2025  
Edit Made By: Martin, Michael

**To resolve an exception, you can:**

- Mark the exception as reviewed and add a comment
- Edit the punch and add a comment
- Add or delete a pay code

## 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

- Access the Employee’s Timecard**
  - Navigate to the timecard for the correct pay period.
- Review the Exception**
  - Identify cells with red indicators and hover to view details.
- Add a Comment**
  - Right-click the cell with the exception.
  - Select **Comments**.
  - Choose a predefined comment and optionally type a note.
  - Click **Apply**.
- 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.

The screenshot displays the UKG Employee Timecards interface. On the left, a table shows employee punches for the week of March 9-14, 2022. A 'Pending Changes' modal is open, showing two changes for a punch on May 10, 2022, from 9:48 AM to 5:00 PM. The changes are labeled 'Punch Added' and 'Out Punch'. On the right, a 'Control Center' notification is shown for a 'Timecard Change Request' from an employee named NTOR, submitted on May 12, 2022, at 8:48 AM. The notification details a 'Punch Out Punch - Added' and a 'Punch' on May 10, 2022, at 5:00 PM. It includes buttons for 'Approve', 'Refuse', and 'Go To'.

**Missed Punch Correction**

**Pending Changes**

**Changes [2]**  
on 5/10/2022

**Punch** Added  
Submitted 5/12/2022 9:48 AM  
5/10/2022 9:00 AM  
In Punch  
Pending

**Punch** Added  
Submitted 5/12/2022 9:48 AM  
5/10/2022 5:00 PM  
Out Punch  
Pending

**Control Center**

**Timecard Change Request**  
Employee, NTOR  
5/12/2022 8:48 AM

Edit  
Punch Out Punch - Added  
Punch  
5/10/2022 5:00 PM

Approve      Refuse      Go To

Pending Changes Visible from Timecard

Manager Approval from Control Center or Timecard

### 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

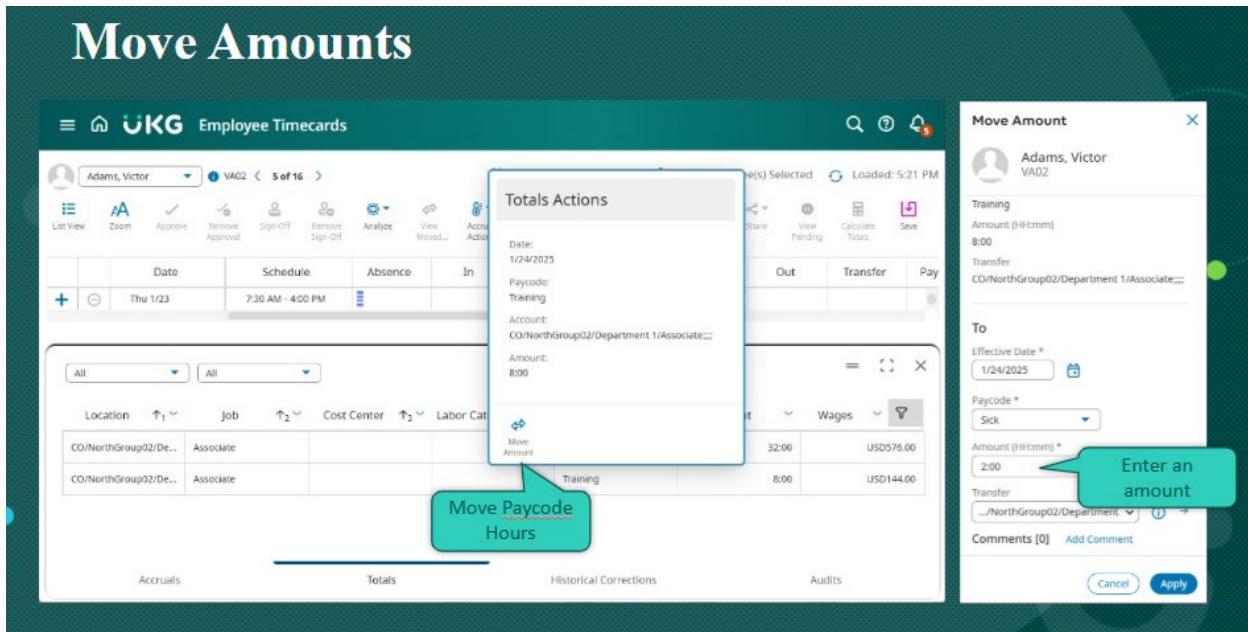
- a. Click the **Notifications (bell)** icon on the Home page.
- b. Select the **Timecard Change Request** notification to open the **Control Center**.

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.

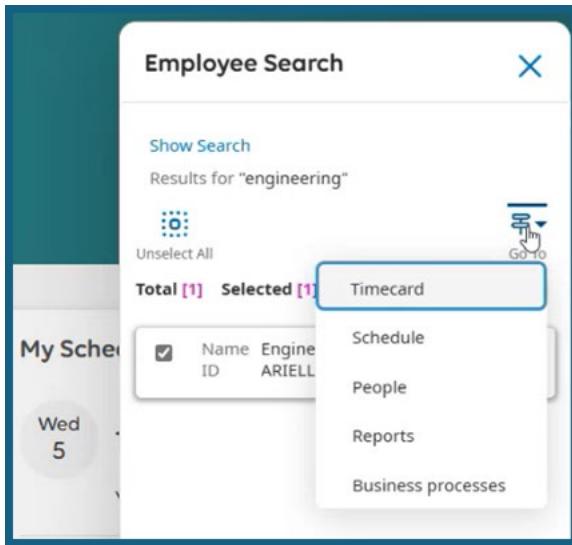
## Job Aid: Labor Distribution and Banner Index Codes

### Purpose

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

### Steps

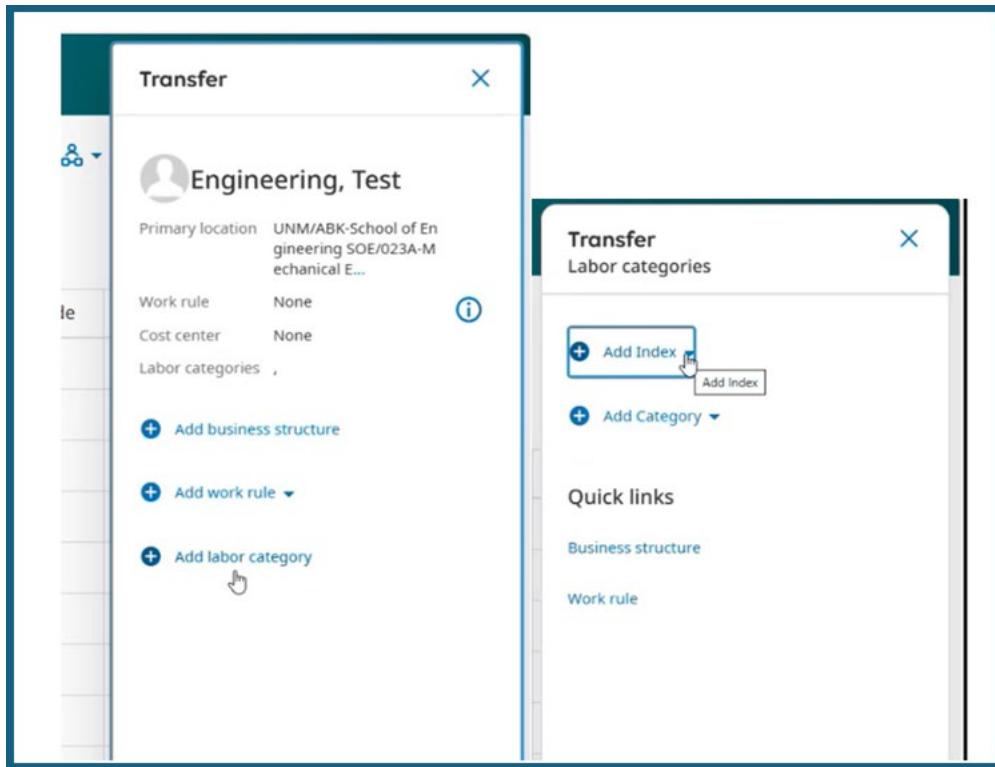
- Navigate to the employee's timecard.



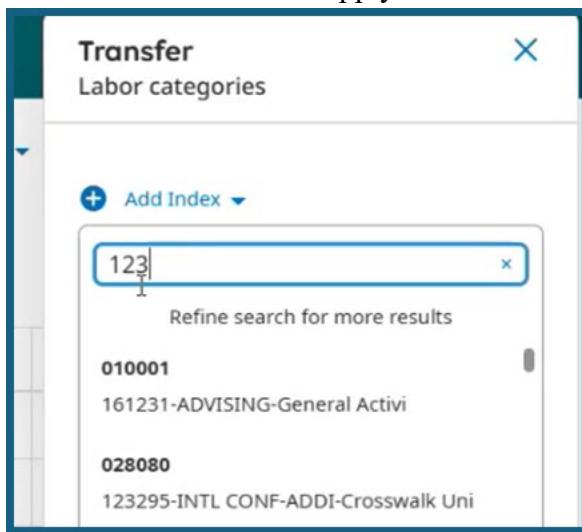
- Select the row of time to edit and click **Transfer**.

The screenshot shows a timecard grid for the week of November 1st. The 'Transfer' column for Monday, November 03, has a dropdown menu open, listing shift options: '8:00 AM - 4:00 PM', 'Choose:', and a list of shift codes: '\$SW Shift: 2 FT 30 Min Ded;;', '\$SW Shift: 1 FT 30 Min Ded;;', '\$SN Shift: 1 FT COMP;;', '\$SW Shift: 1 Callback;;', and '\$SW Shift: 1 FT Util Ops COMP;;'. The total hours for the week are 8.00.

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



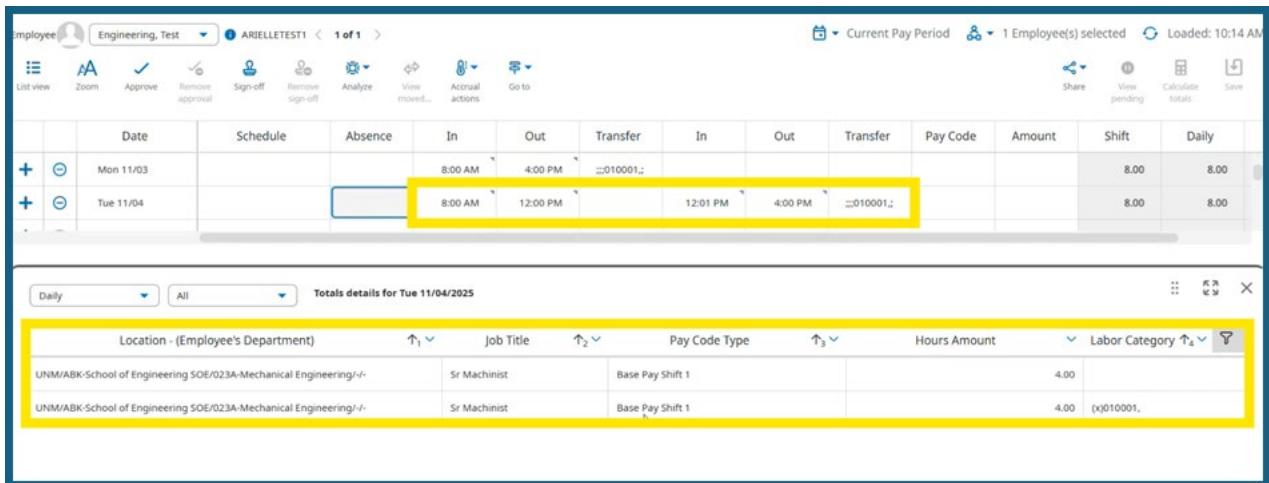
- Select **Add Index**, then type in an appropriate index in the search field, select index and click OK and then click Apply.



- 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.



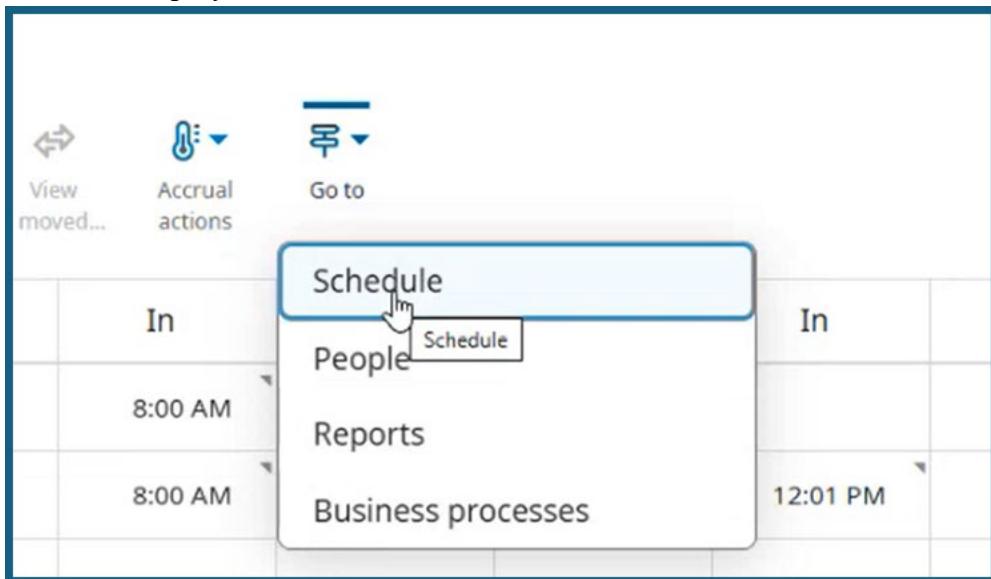
The screenshot shows the Payroll module interface for an employee named ARIELLETEST1. The top navigation bar includes 'Employee', 'Engineering, Test', 'ARIELLETEST1', '1 of 1', 'Current Pay Period', '1 Employee(s) selected', and 'Loaded: 10:14 AM'. Below the navigation is a toolbar with icons for List view, Zoom, Approve, Remove approval, Sign-off, Remove sign-off, Analyze, View moved..., Accrual actions, and Go to. The main area displays a table of scheduled work hours. The table has columns for Date, Schedule, Absence, In, Out, Transfer, In, Out, Transfer, Pay Code, Amount, Shift, and Daily. Two rows are shown: 'Mon 11/03' and 'Tue 11/04'. The 'Tue 11/04' row has a yellow box highlighting the 'In' and 'Out' times (8:00 AM and 12:00 PM) and the 'Transfer' value (010001). Below the table is a 'Totals details for Tue 11/04/2025' section with a table showing location, job title, pay code type, hours amount, and labor category. The 'Location - (Employee's Department)' column lists 'UNM/ABK-School of Engineering SOE/023A-Mechanical Engineering/-'. The 'Job Title' column lists 'Sr Machinist'. The 'Pay Code Type' column lists 'Base Pay Shift 1'. The 'Hours Amount' column lists '4.00'. The 'Labor Category' column lists '(010001,'.

## 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

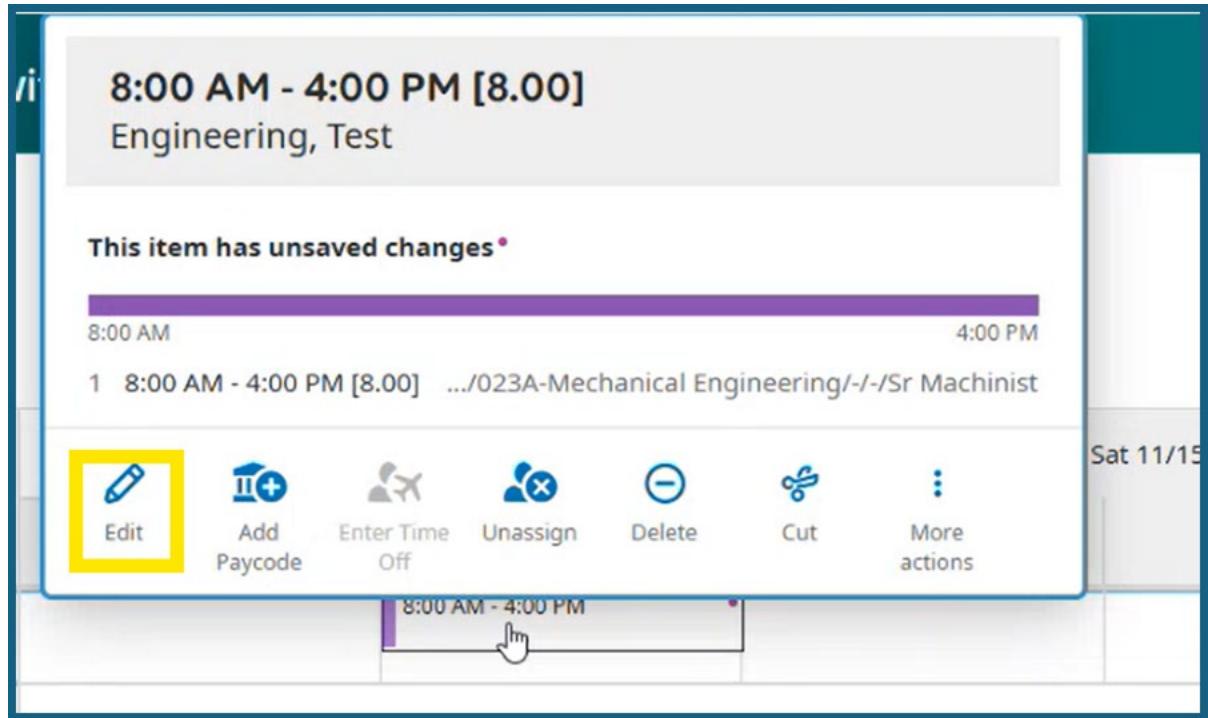
- Go to the employee's schedule.



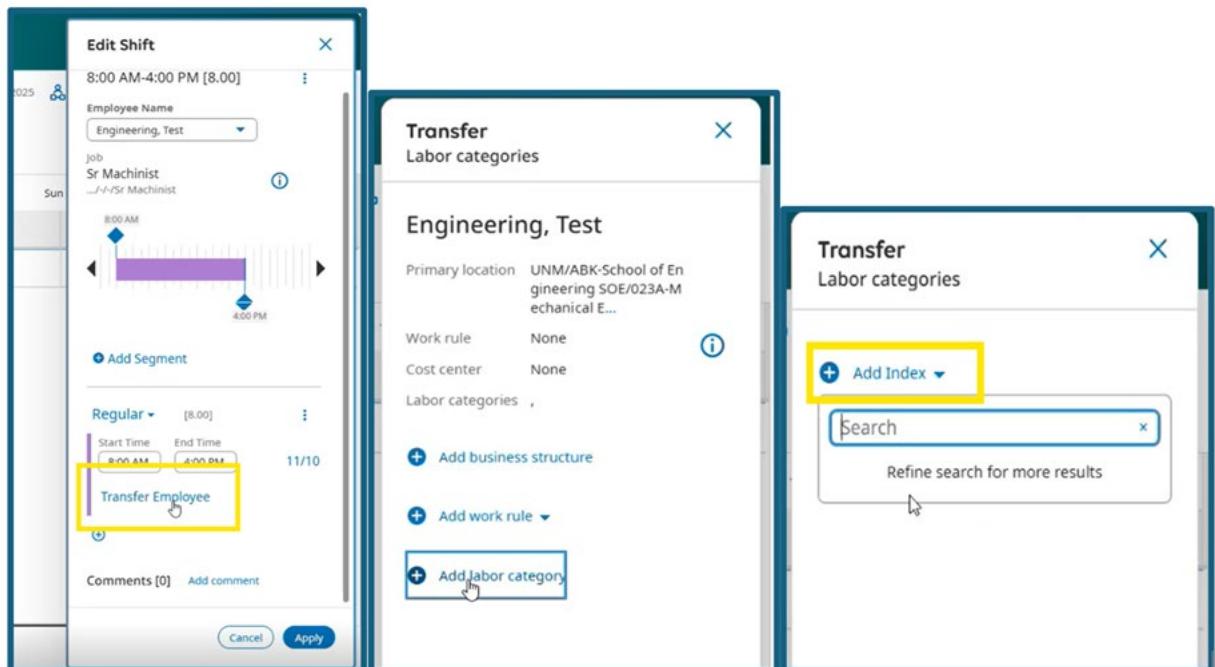
The screenshot shows the Payroll module interface with a dropdown menu open. The menu items are 'Schedule', 'People', 'Reports', and 'Business processes'. The 'Schedule' item is highlighted with a blue box and a mouse cursor. The background shows a table of scheduled work hours for an employee. The table has columns for In and Out times. The 'In' column shows '8:00 AM' and '8:00 AM'. The 'Out' column shows '12:01 PM'. The 'Schedule' menu is positioned between the 'In' and 'Out' columns.

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

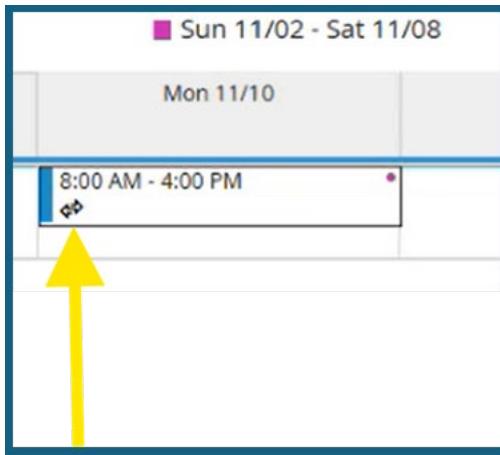
- Right-click the shift and select **Edit**.



- 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:

	Date	Schedule	Absence	In	Out	Transfer	In	Out
+	Wed 11/05							
+	Thu 11/06							
+	Fri 11/07							
+	Sat 11/08							
+	Sun 11/09							
+	Mon 11/10	8:00 AM - 4:00 PM	010001	8:00 AM	4:00 PM			

- You can also confirm this in daily totals.

Daily		All		Totals details for Mon 11/10/2025				
Location - (Employee's Department)	Job Title	Pay Code Type	Hours Amount	Labor Category				
UNM/ABK-School of Engineering SOE/023A-Mechanical Engineering/-/-	Sr Machinist	Base Pay Shift 1	8.00	010001				

## 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.

The screenshot shows a weekly schedule grid with days from Sunday to Saturday. Each day row has a 'Totals' button in the top-left corner. A yellow arrow points from the 'Totals' button of the Monday row to a yellow box highlighting the 'Totals' button in the bottom navigation bar. The bottom navigation bar also includes 'approval', 'sign-off', 'moved...', and 'actions' buttons.

+/-	Sun 11/02					
+/-	Mon 11/03				8:00 AM	4:00 PM
+/-	Tue 11/04				8:00 AM	12:00 PM
+/-	Wed 11/05				8:00 AM	6:00 PM
+/-	Thu 11/06				8:00 AM	4:00 PM
+/-	Fri 11/07				8:00 AM	4:00 PM
+/-	Sat 11/08					
+/-	Sun 11/09					
+/-	Mon 11/10	8:00 AM - 4:00 PM	↔		8:00 AM	4:00 PM

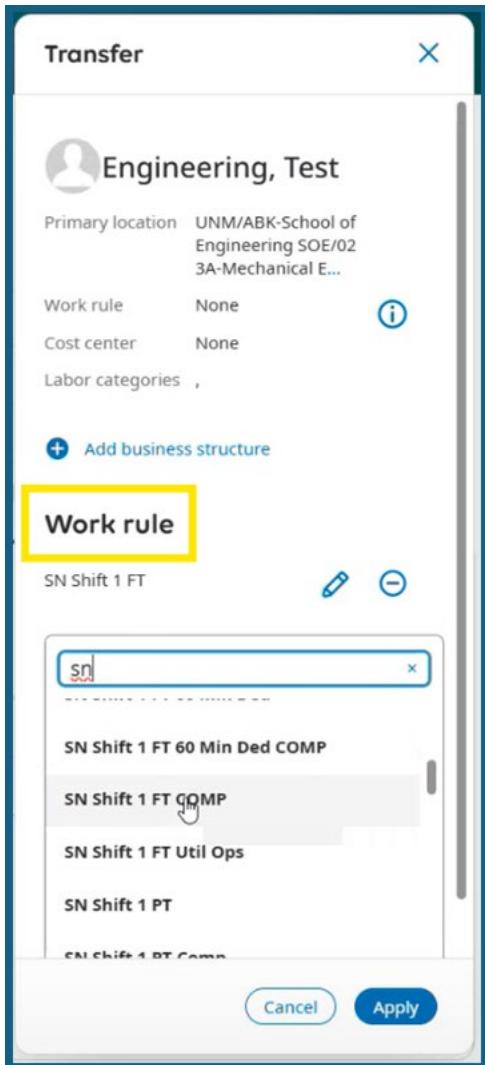
**Totals**

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

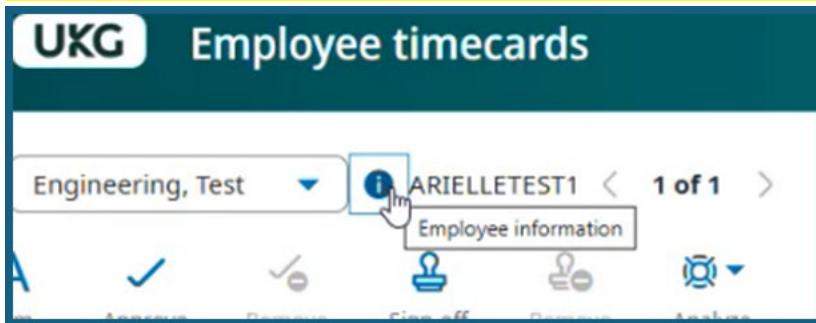
The screenshot shows a daily schedule grid with rows for Friday and Saturday. The 'Transfer' column is highlighted with a yellow box. A yellow arrow points from the 'Transfer' column of the Friday row to a yellow box highlighting the 'Transfer' column in the bottom navigation bar. The bottom navigation bar also includes 'approval', 'sign-off', 'moved...', and 'actions' buttons.

		Date	Schedule	Absence	In	Out	Transfer	In
+/-	Fri 11/07				8:00 AM	4:00 PM		
+/-	Sat 11/08							

- 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.



The screenshot shows the UKG Overtime Group Approvals interface. On the left, a sidebar menu for Michael Martin includes options like Edit Profile, Sign Out, Home, Time, Employee Summary, Timecards, Overtime Group Approvals (which is selected and highlighted in blue), Schedule, and Current Schedule. The main content area is titled "Overtime Group Approvals" and shows a table of "Pending Overtime" requests. A callout bubble points to the table with the text "View and assess hours worked". The table columns are Grouped By..., Employee Full Name ↑, Apply Date, Start Time, End Time, Comments Text, Reviewer Name, and Reviewed... . The data in the table is as follows:

Grouped By...	Employee Full Name ↑	Apply Date	Start Time	End Time	Comments Text	Reviewer Name	Reviewed...
Pending Overtime	Adams, Greg	5/01/2025	3:30 PM	4:00 PM			
	Adams, Greg	4/28/2025	2:30 PM	4:00 PM			
	Adams, Greg	4/30/2025	3:30 PM	4:00 PM			
	Adams, Greg	5/02/2025	3:30 PM	4:00 PM			
	Adams, Greg	4/29/2025	3:30 PM	4:00 PM			
	Adams, Molly	4/30/2025	10:30 PM	11:00 PM			
	Adams, Molly	5/03/2025	10:30 PM	11:00 PM			
	Adams, Molly	4/29/2025	10:30 PM	11:00 PM			
	Adams, Molly	5/01/2025	10:30 PM	11:00 PM			
	Adams, Molly	4/28/2025	10:30 PM	11:00 PM			

## Steps to Approve Overtime for Multiple Employees

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

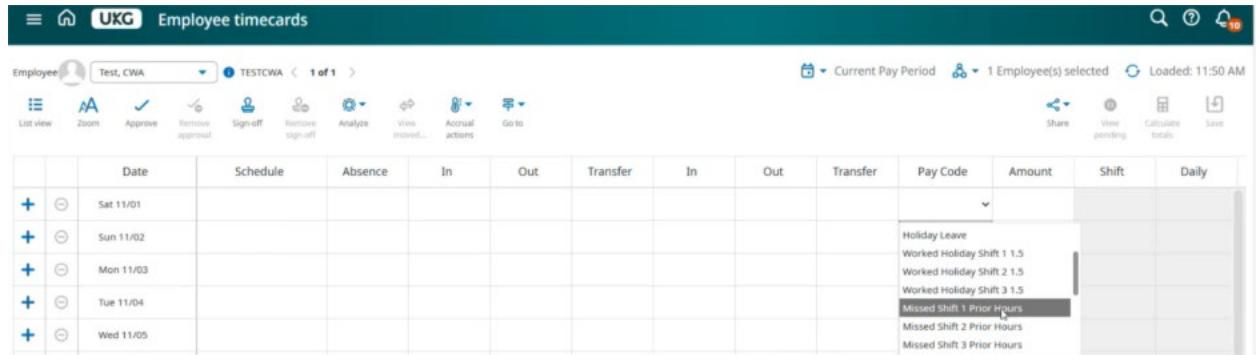
Add missed hours from previous pay period for part time staff and students who did not have a job record or UKG profile in time for reporting hours worked.

### **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](mailto: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.



Employee timecards

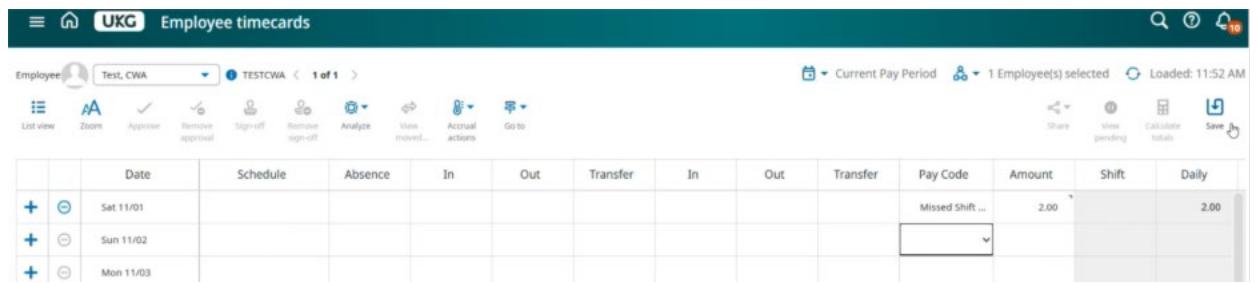
Employee: Test, CWA TESTCWA 1 of 1

Date Schedule Absence In Out Transfer In Out Transfer Pay Code Amount Shift Daily

	Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	Shift	Daily
+	Sat 11/01												
+	Sun 11/02												
+	Mon 11/03												
+	Tue 11/04												
+	Wed 11/05												

Share View pending Calculate totals Save

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



Employee timecards

Employee: Test, CWA TESTCWA 1 of 1

Date Schedule Absence In Out Transfer In Out Transfer Pay Code Amount Shift Daily

	Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	Shift	Daily
+	Sat 11/01												
+	Sun 11/02												
+	Mon 11/03												
+	Tue 11/04												
+	Wed 11/05									Missed Shift ...	2.00		2.00

Share View pending Calculate totals Save

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.

The screenshot shows the UKG Reports interface. On the left, a sidebar lists 'Completed [1]', 'In Progress [0]', and 'Upcoming Reports [0]'. A callout bubble points to these with the text 'View reports in various statuses and access completed reports'. On the right, a 'Time Detail' report for 'Timekeeping' is displayed, showing a table of pay stub data for employees Adams, Victor (VA02) and Reyes, David (DR02). A callout bubble points to the report with the text 'View and download reports'.

Job	Location	Employee Name (ID)	Pay Code	Hours	Money	Days
Associate						
CO/NorthGroup02/ Department 1/ Associate						
Adams, Victor (VA02)						
		Regular	40.00	720.00	0.00	
		FTPT Contributing Pay Codes	40.00	720.00	0.00	
			80.00	1440.00	0.00	
Reyes, David (DR02)						
		Regular	40.00	720.00	0.00	
		Daily-OT	2.50	67.50	0.00	
		Overtime Total	2.50	67.50	0.00	
		FTPT Contributing Pay Codes	42.50	787.50	0.00	
		Overtime Worked	2.50	67.50	0.00	
			90.00	1710.00	0.00	

## 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.

The screenshot shows the UKG Report Library interface. On the left, there are sections for 'Completed' (2 reports), 'In Progress' (0), and 'Upcoming Reports' (0). Two reports are listed: 'Authentication Security Report' and 'Condensed Employee Time Detail'. The 'Condensed Employee Time Detail' report is selected, and a modal window titled 'Select Report' is displayed. The 'Absent Employees' report is highlighted in the list, and its description is visible: 'This report displays employees who are absent and whether they are excused or unexcused absences. Displays data for the selected date range. Only absences through the current day are displayed, future scheduled absences do not appear in the report.' At the bottom of the modal are 'Cancel' and 'Select' buttons.

### Example:

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

## 4. Setting Parameters

**Absent Employees** X

**Description**  
This report displays employees who are absent and whether they are excused or unexcused absences. Displays data for the selected date range. Only absences through the current day are displayed, future scheduled absences do not appear in the report.

**Timeframe \***  
 Previous Pay Period < >

**HyperFind \***  
 All Home

**Absence Type \***

**Output Format \***  
 PDF

Cancel Run Report

- 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.

**Approve Multiple Timecards**

**Pay Period Close**

Employee Name: Welch, Justin  
Total Worked: 84:00  
Total No.: 1  
Missed In Punch: 0  
Missing Out Punch: 0  
Unexcused Abs: 0

Employee Name: Garcia, Maria  
Total Worked: 84:00  
Total No.: 1  
Missed In Punch: 0  
Missing Out Punch: 0  
Unexcused Abs: 0

Employee Name: Adams, Olivia  
Total Worked: 84:00  
Total No.: 1  
Missed In Punch: 0  
Missing Out Punch: 0  
Unexcused Abs: 0

Employee Name: Reyes, David  
Total Worked: 84:00  
Total No.: 1  
Missed In Punch: 0  
Missing Out Punch: 0  
Unexcused Abs: 0

Employee Name: Edwards, Ryan  
Total Worked: 90:00  
Total No.: 1  
Missed In Punch: 0  
Missing Out Punch: 0  
Unexcused Abs: 0

Employee Name: Devos, Julio  
Total Worked: 84:00  
Total No.: 1  
Missed In Punch: 0  
Missing Out Punch: 0  
Unexcused Abs: 0

**Approving Managers**

Martin, Michael (Successful approval)

Timecard approvals are performed in the previous pay period 90% of the time. Approving timecards in the current period will lock employees out of the timecard.

Missing punches and unexcused absences display in the 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.

The screenshot shows the UKG Employee Timecards interface. At the top, a green callout box points to the 'Access Employee Timecards' button. Another green callout box points to the 'Approve the timecard' button. A large green callout box on the right contains the text: 'Timecard approvals are performed in the previous pay period 90% of the time. Approving timecards in the current period will lock employees out of the timecard.' At the bottom, a green callout box points to the 'Timecard color changes' message, which is displayed in a separate window.

### 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**.

**Timecard Sign-off**

**Employee Timecards**

**Confirmation message**

**Color change after sign-off**

**Verify the pay period**

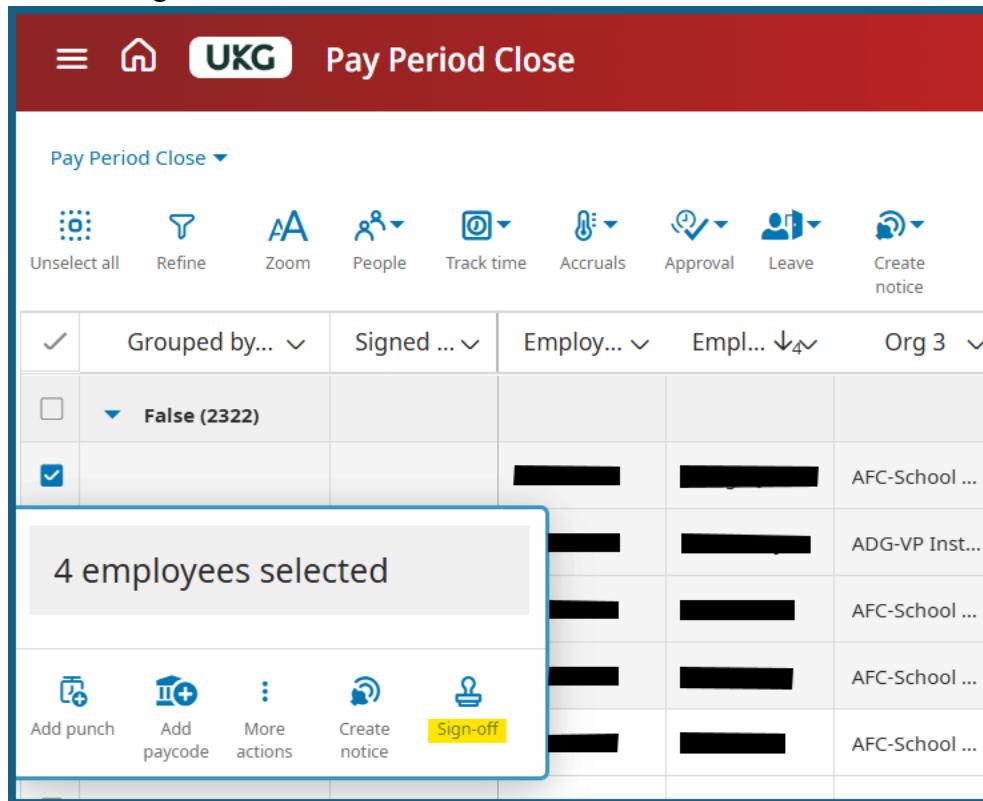
**UKG**

## 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”



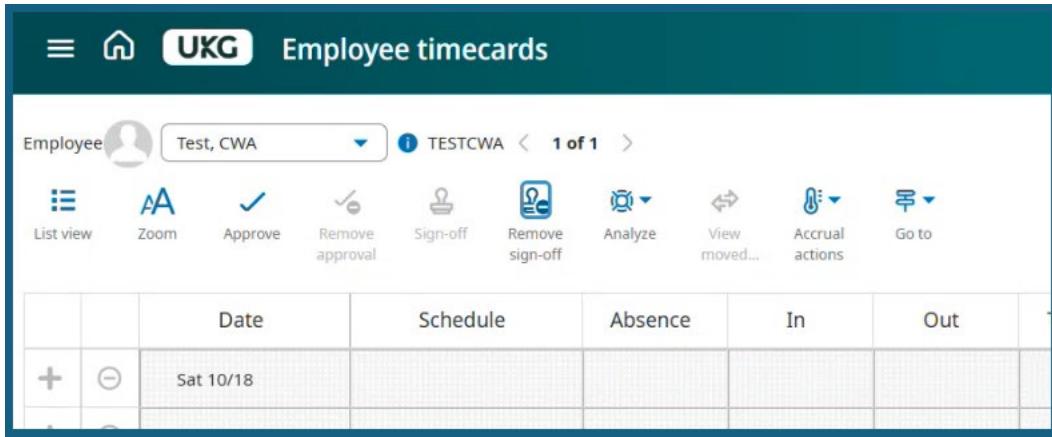
The screenshot shows the UKG Pay Period Close Dataview. At the top, there are navigation icons and the title "Pay Period Close". Below the title is a toolbar with various filters: Unselect all, Refine, Zoom, People, Track time, Accruals, Approval, Leave, and Create notice. The main area displays a table of employees. A modal dialog box is overlaid on the table, stating "4 employees selected". At the bottom of the table, there is a row of action buttons: Add punch, Add paycode, More actions, Create notice, and Sign-off. The "Sign-off" button is highlighted with a yellow box.

## 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.



The screenshot shows the UKG Employee timecards interface. At the top, it displays the employee name 'TESTCWA' and the date '1 of 1'. Below the header are several action buttons: List view, Zoom, Approve, Remove approval, Sign-off, Remove sign-off, Analyze, View moved..., Accrual actions, and Go to. The main area is a table with columns for Date, Schedule, Absence, In, and Out. A row for Saturday, 10/18, is visible, showing a plus sign in the Date column and a minus sign in the Schedule column.

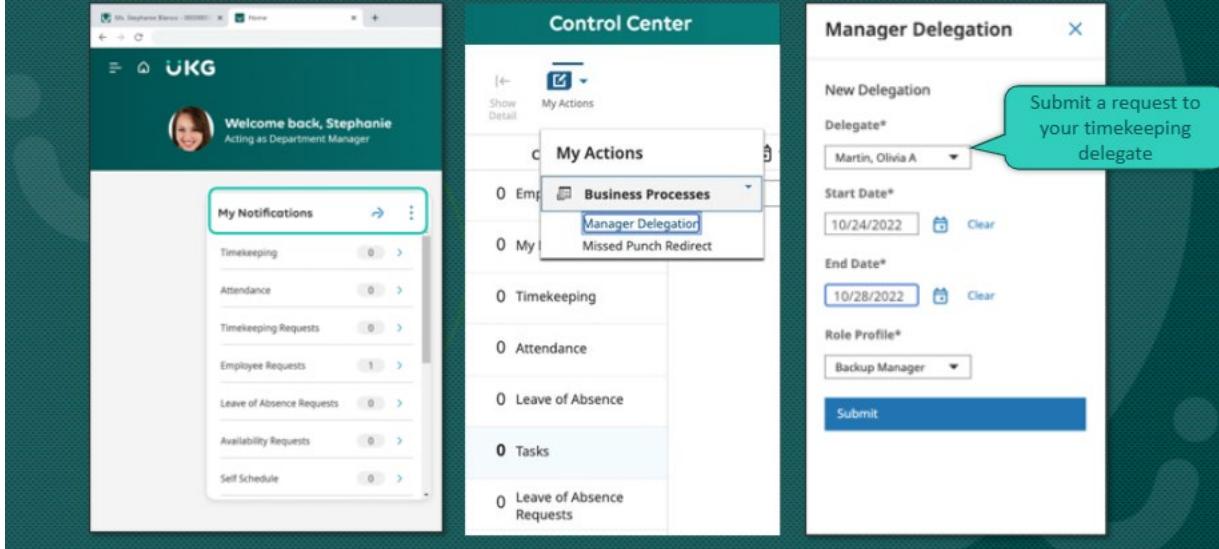
3. Make necessary edits.
4. Reapply Sign-Off before payroll cutoff.
  - a. **Important Note:** Removing sign-off for corrections should only occur prior to payroll cutoff (typically Monday at 4pm). If you make corrections after payroll has run, those corrections will not be captured on the pickup. Pickups 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).

# Submit a Manager Delegation Request



## 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

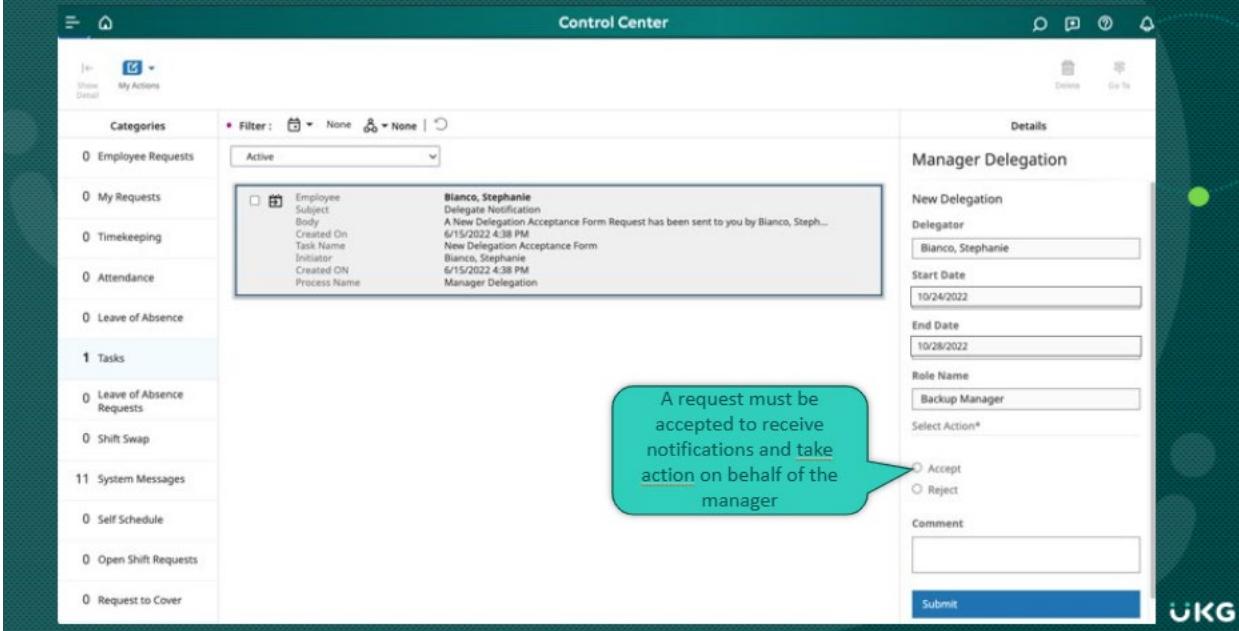
1. **Access** the timekeeping system.
2. **Navigate** to the **Delegate Assignment** option (location may vary by system).
3. **Select** the employee to act as your delegate.
4. **Specify** the start and end dates for the delegation.
5. **Submit** the request for confirmation.

## 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.

# Accept a Manager Delegation Request



The screenshot shows the UKG Workforce Management Control Center. On the left, a sidebar lists categories like Employee Requests, My Requests, Timekeeping, Attendance, Leave of Absence, Tasks, and System Messages. The Employee Requests section is expanded, showing a list of delegation requests. One request from 'Bianco, Stephanie' is highlighted. A callout bubble with a green border and white text states: 'A request must be accepted to receive notifications and take action on behalf of the manager'. On the right, a 'Manager Delegation' panel is open, showing fields for Delegator (Bianco, Stephanie), Start Date (10/24/2022), End Date (10/28/2022), Role Name (Backup Manager), and a 'Select Action' section with radio buttons for 'Accept' and 'Reject'. A 'Submit' button is at the bottom.

## 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

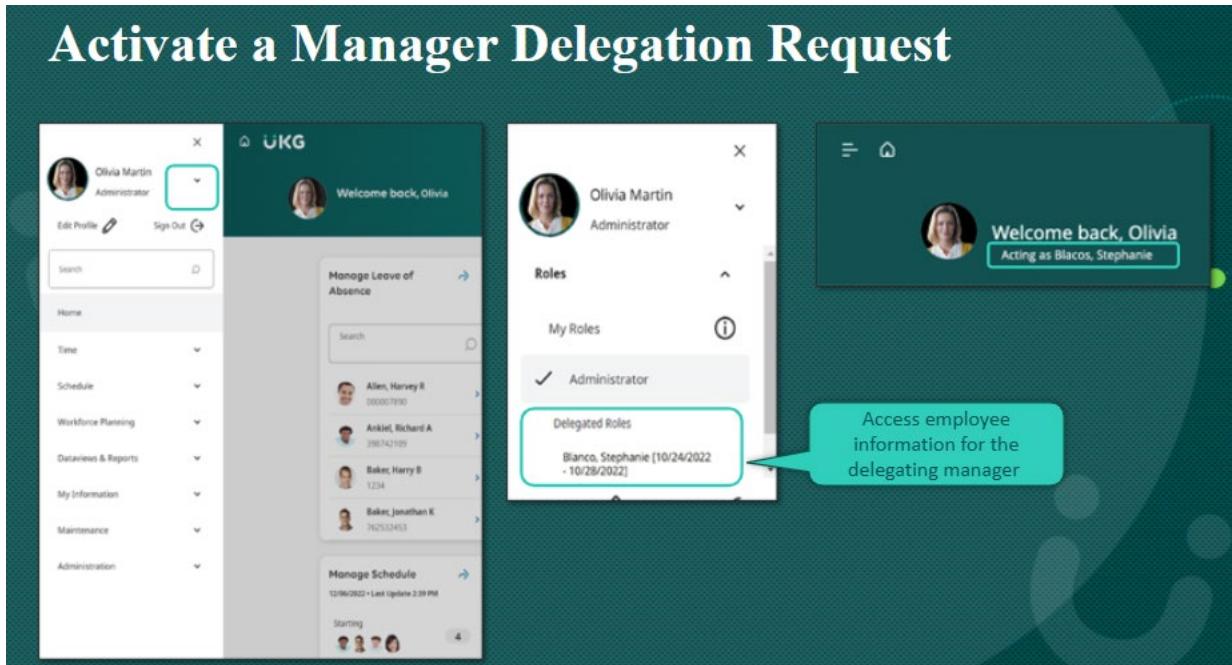
- Confirm that you have access to timekeeping tasks for the specified duration.

## 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.

## Activate a Manager Delegation Request



Access employee information for the delegating manager

### 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.

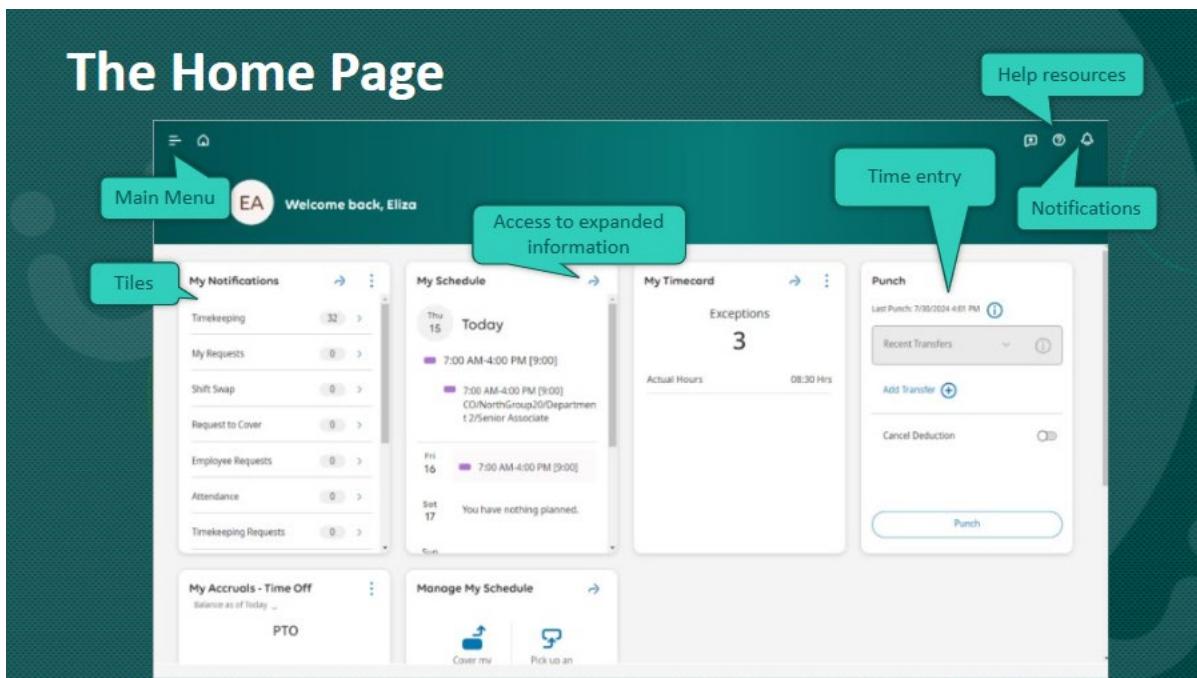
In **Sign-off status/Pay Period Close Dataview**- Review the column called **Manager Approval Count** and **Approving Manager** to show whether more than one manager approves a timecard. You would need to know your multiple assignment people and then check that they have 2 in that column before signing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

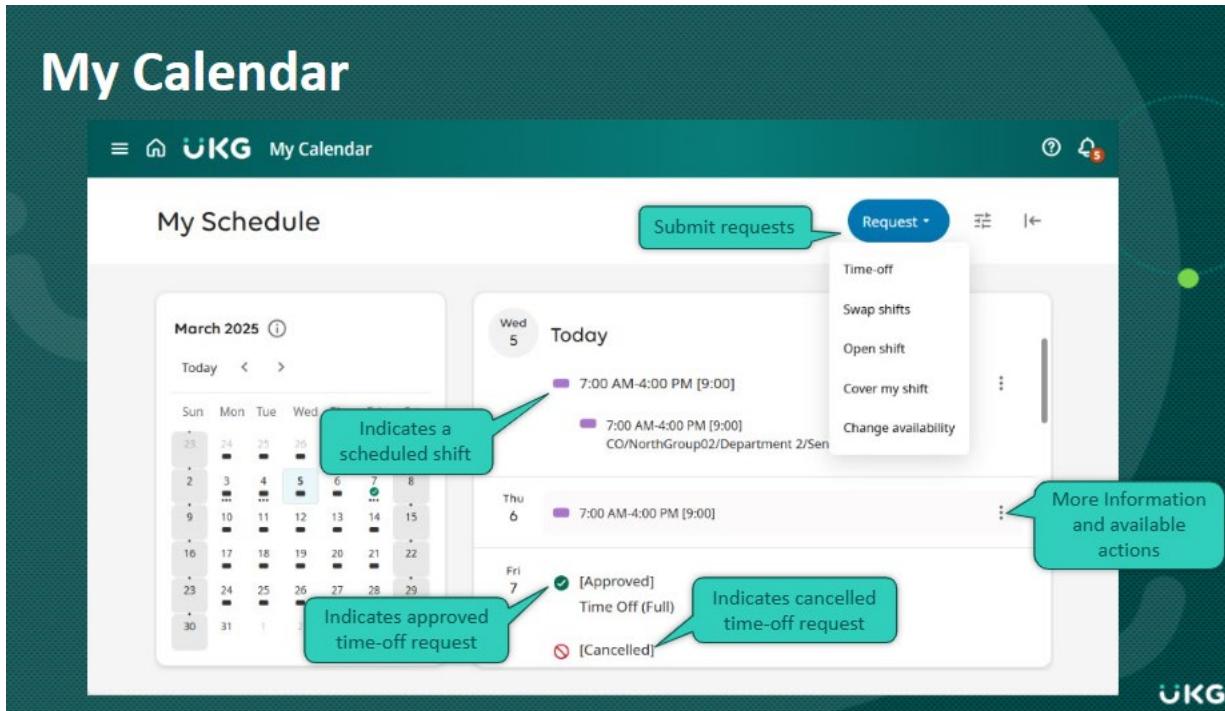
#### **Tips for Employees**

- 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.

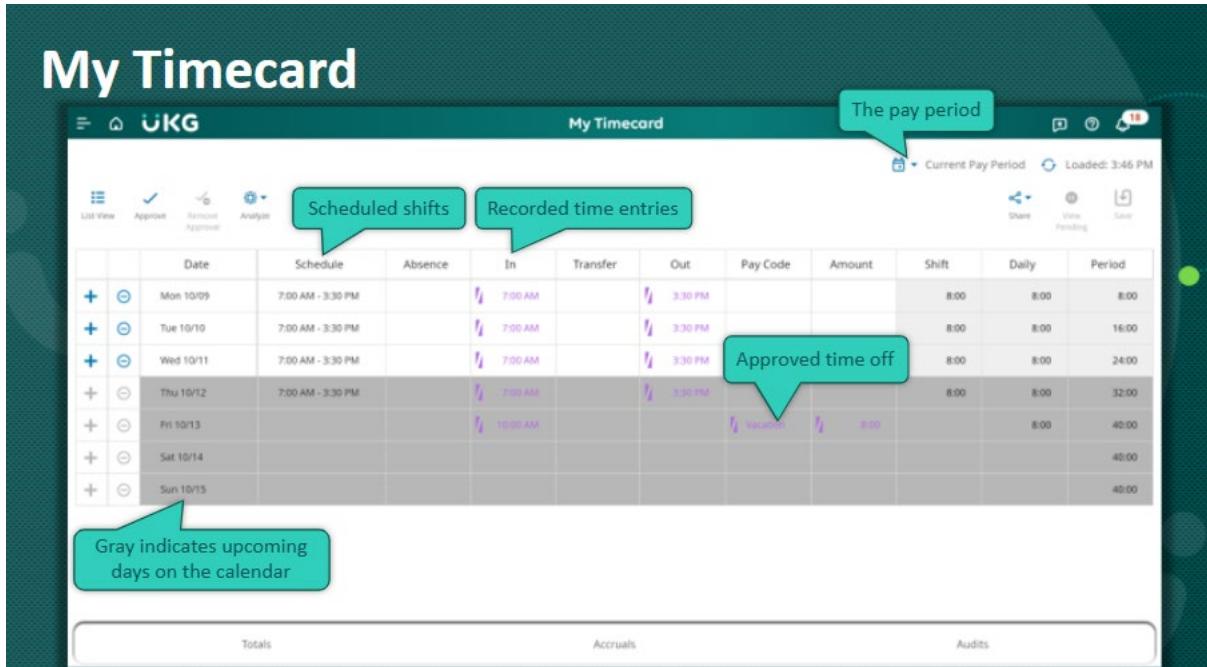
## How to View Your Schedule

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.



The screenshot shows a 'My Timecard' interface with a grid of time entries. The grid columns include Date, Schedule, Absence, In, Transfer, Out, Pay Code, Amount, Shift, Daily, and Period. The rows represent dates from Mon 10/09 to Sun 10/15. Some cells contain icons for editing or viewing details. A tooltip 'The pay period' points to the top right of the grid. A tooltip 'Scheduled shifts' points to the 'Schedule' column. A tooltip 'Recorded time entries' points to the 'In' column. A tooltip 'Approved time off' points to a specific entry in the 'Out' column. A tooltip 'Gray indicates upcoming days on the calendar' points to the dates from Fri 10/13 to Sun 10/15, which are displayed in gray. The top navigation bar includes 'List View', 'Approve', 'Remove Approval', 'Analyze', 'Current Pay Period' (selected), 'Loaded: 3:46 PM', 'Share', 'View Pending', and 'Save'.

Date	Schedule	Absence	In	Transfer	Out	Pay Code	Amount	Shift	Daily	Period	
Mon 10/09	7:00 AM - 3:30 PM								8:00	8:00	8:00
Tue 10/10	7:00 AM - 3:30 PM								8:00	8:00	16:00
Wed 10/11	7:00 AM - 3:30 PM								8:00	8:00	24:00
Thu 10/12	7:00 AM - 3:30 PM								8:00	8:00	32:00
Fri 10/13										8:00	40:00
Sat 10/14											40:00
Sun 10/15											40:00

## 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

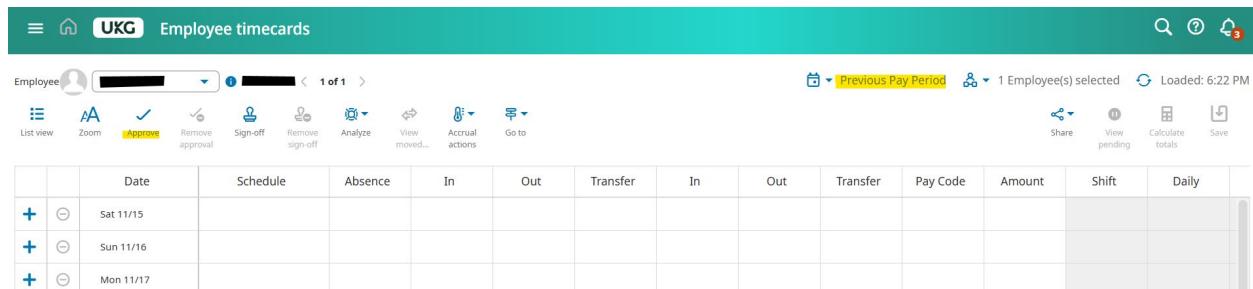
- Ensure you are viewing the **Previous Pay Period**.

## 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.

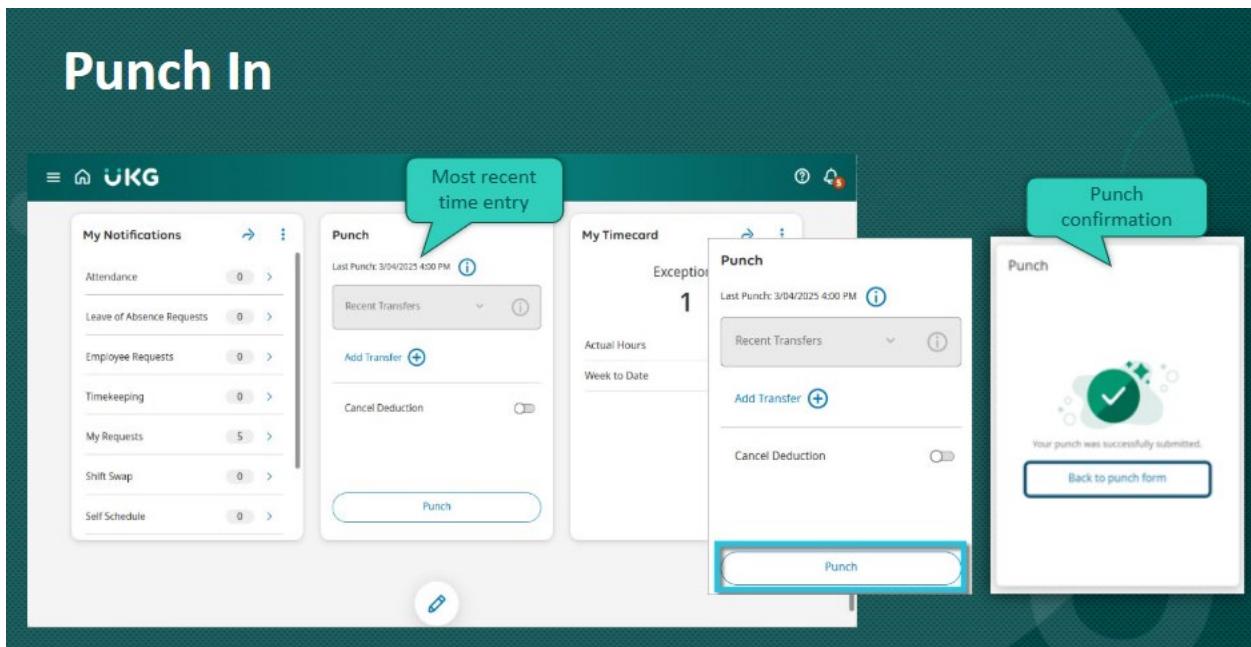


	Date	Schedule	Absence	In	Out	Transfer	In	Out	Transfer	Pay Code	Amount	Shift	Daily	
+	Sat 11/15													
+	Sun 11/16													
+	Mon 11/17													

## 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

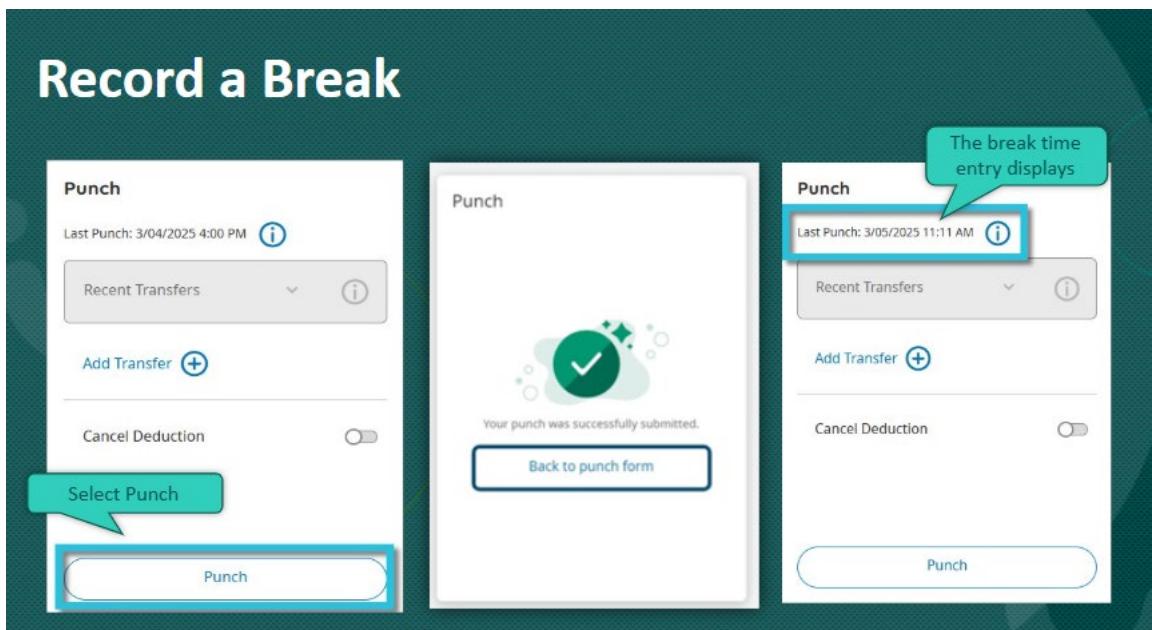
1. **Log in.**
2. On the homepage, **select the Punch tile**.
3. **Choose** the appropriate button (e.g., **Punch In, Punch Out**).
4. Click Save.
5. Confirm that your punch was recorded successfully.

## 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.

## Record a Break



### 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**.

# Submit a Time-off Request from My Time Off

The image displays three sequential screenshots of a software interface for submitting a time-off request. The first screenshot shows the 'My Time Off' tile on a dashboard, featuring fields for 'Reason' (Vacation: 45:00 Hours) and 'Dates' (3/05/2025), along with 'Sync with My Calendar' and 'Notify My Colleagues' toggle buttons, and an 'Advanced Options' button. The second screenshot shows the 'Request time off' step, prompting the user to 'Enter the dates and details for your time-off request.' It includes a 'Request type' dropdown set to 'Time Off', date input fields for 'Start Date' (3/07/2025) and 'End date' (3/07/2025), and a note: 'Enter dates or use the calendar icon to select dates.' The third screenshot shows the 'Request Details' step, where the 'Duration' is set to 'Full' and 'Deduct from' is set to 'Vacation (45:00 Hours)'. Callouts with arrows point to the 'Duration' and 'Deduct from' dropdowns, with text explaining: 'Select the duration from the list.' and 'Select the accrual type from the list.'

## 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).

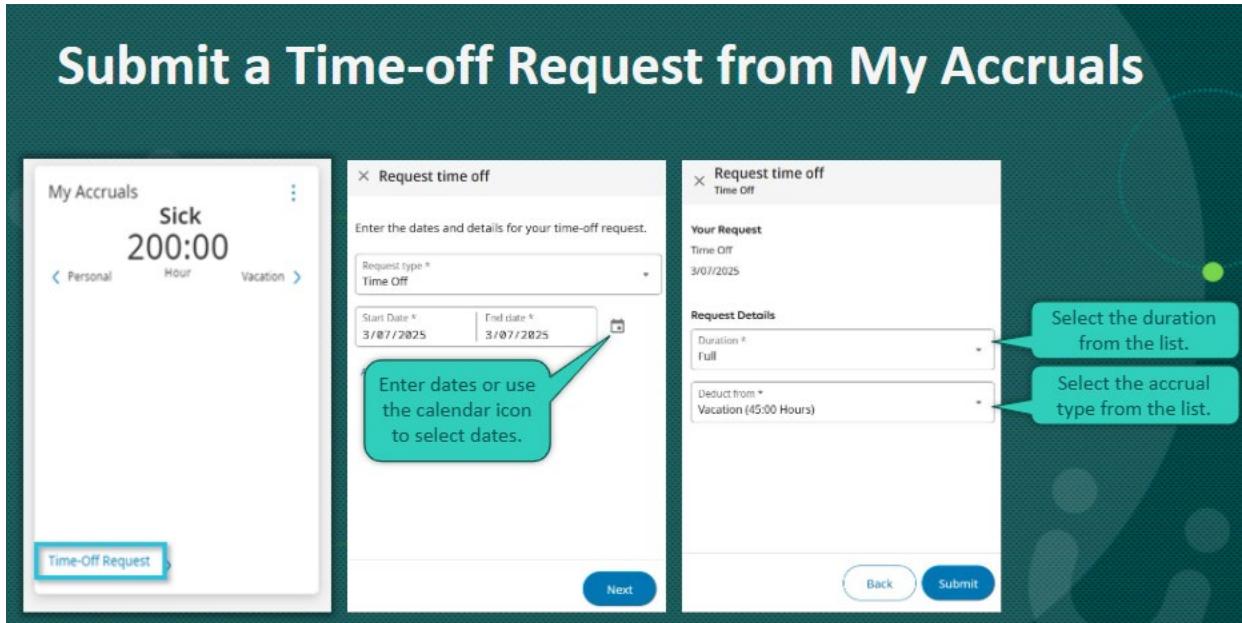
## Steps to Request Time Off

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).

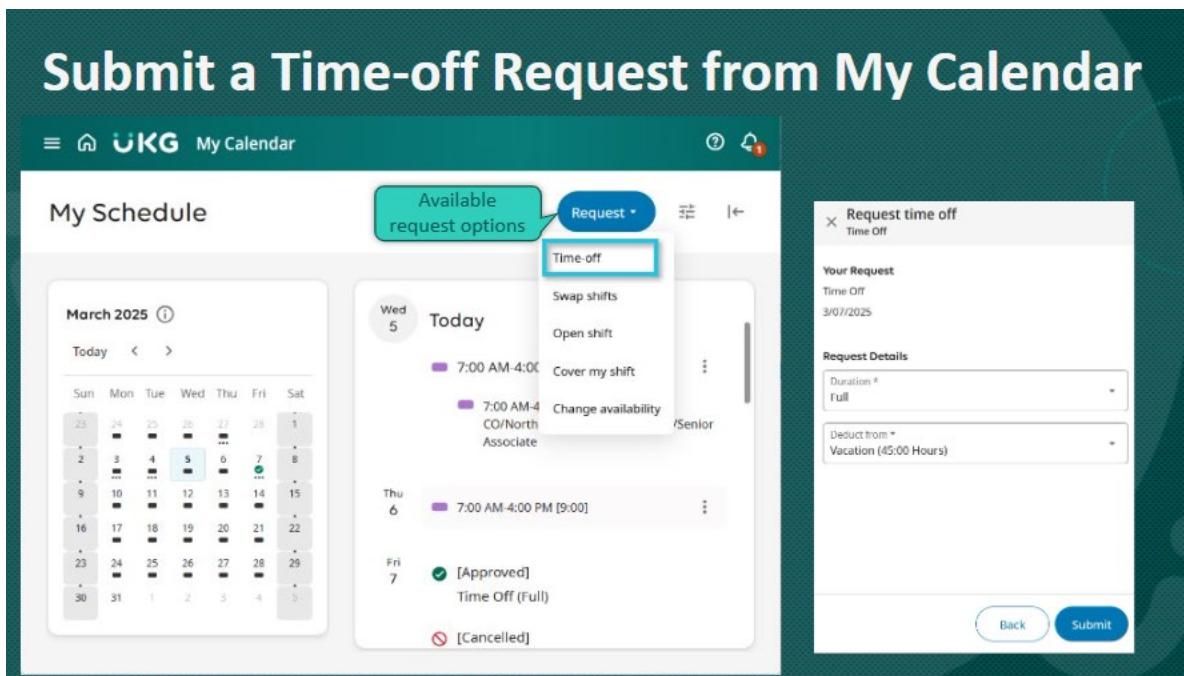
## Steps to Request Time Off

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).

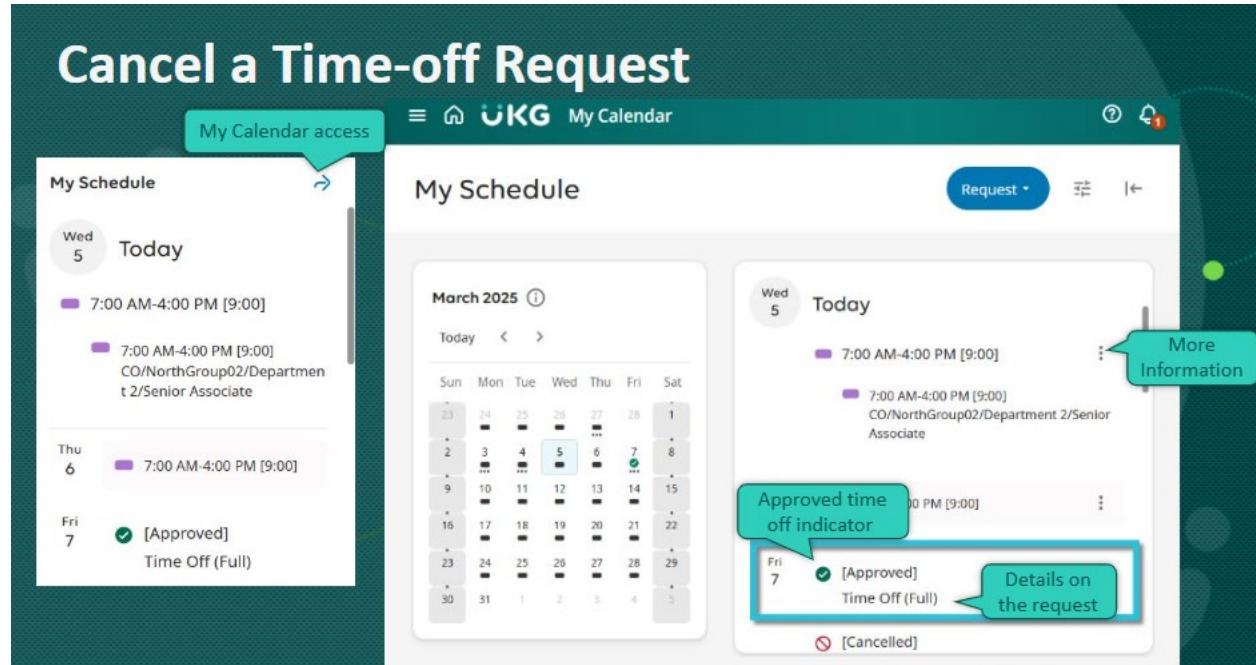
## Steps to Request Time Off

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.

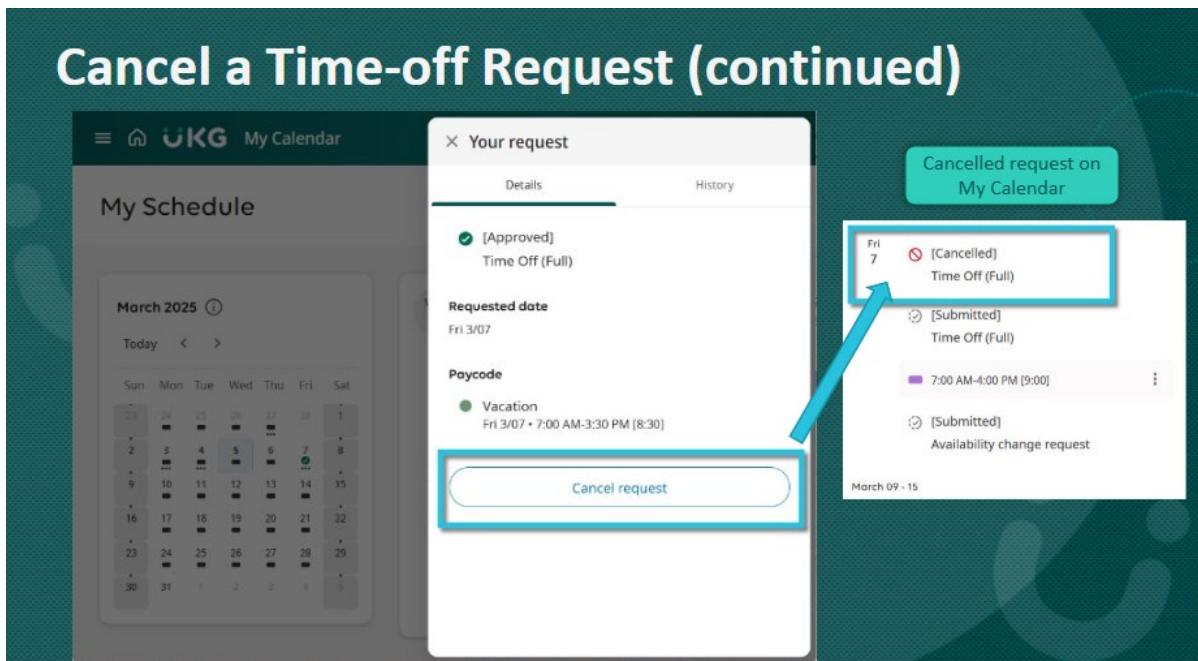


### Key Points

- 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.