UDTime
Supervisors/Timekeepers for
Misc. Wage and Student Employees
Training Agenda

• Supervisors and Timekeepers (60 minutes)
  – UDTime comparison to current time collection methods
  – Logging into UDTime system
  – Reviewing timesheets
  – Work Study information
  – Editing or correcting timesheets
  – Approving timesheets
  – Rejecting a timesheet
  – Amended timesheets
  – Alternatives when additional approvers are needed
<table>
<thead>
<tr>
<th>Contents</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>UDTime vs. Old time collection methods</td>
<td>4</td>
</tr>
<tr>
<td>BOT Payroll Deadline for 8/9/13 Pay Date</td>
<td>5</td>
</tr>
<tr>
<td>Logging into UDTime</td>
<td>6</td>
</tr>
<tr>
<td>UDTime home page / dashboard</td>
<td>7</td>
</tr>
<tr>
<td>Reviewing timesheets</td>
<td>8 and 11</td>
</tr>
<tr>
<td>Finding an employee’s timesheet</td>
<td>9 - 10</td>
</tr>
<tr>
<td>Reviewed checkbox</td>
<td>12</td>
</tr>
<tr>
<td>Exception tab</td>
<td>13</td>
</tr>
<tr>
<td>Results tab</td>
<td>14</td>
</tr>
<tr>
<td>Work Study tab and other Work Study information</td>
<td>15 - 17</td>
</tr>
<tr>
<td>Editing timesheet</td>
<td>18 - 21</td>
</tr>
<tr>
<td>Deleting time from a timesheet</td>
<td>22</td>
</tr>
<tr>
<td>Approving timesheets</td>
<td>23 - 25</td>
</tr>
<tr>
<td>Rejecting a timesheet</td>
<td>26 - 27</td>
</tr>
<tr>
<td>Amending a timesheet</td>
<td>28</td>
</tr>
<tr>
<td>Alternatives when additional approvers are needed</td>
<td>29 - 33</td>
</tr>
<tr>
<td>New BOT Payroll Deadlines starting in August</td>
<td>34</td>
</tr>
</tbody>
</table>
Misc. Wage and Student Work Time

UDTime vs. Old time collection methods

NEW time and attendance SYSTEM
WebClock
No routing with one approval by supervisor or timekeeper who must have Purpose/Acct code authority
6-day lag pay
starts 8/4/2013

old webform
manual tracking/entry of hours
many approvals with routing, including Purpose/Acct code approver
13-day lag pay
Submissions end 8/5/2013 5pm for hours thru 8/3
Misc. Wage and Student Hours
Updated BOT Payroll Deadlines
July 14 to August 3
(3 weeks)
Paid on 8/9/2013

Final Bi-Weekly Pay with TRFs and Excel Spreadsheets

<table>
<thead>
<tr>
<th>Hours</th>
<th>Web TRF/Excel Deadline</th>
<th>Pay Date</th>
</tr>
</thead>
</table>

“CATCH-UP” week
Logging into UDTime

1. Go to the UDTime website: http://www.udel.edu/udtime
2. Log in
3. Click on Time Entry
   - Edit Employee Time
   - Edit Time for Groups
   - Approve Time Sheets
4. Manage other options such as Schedules, Reports, and Central Authentication Service (CAS)
Supervisors & Timekeepers

UDTime home page

No one will update schedules in UDTime.

- New position, use Request to Recruit
- Existing position, use Position Change webforms.

You will ONLY see this message the first time logging-in, click OK

This is a link to Leave Balances View

N/A

Use to review or update employee timesheets

Use to approve employee timesheets

Welcome to the Customizable Dashboard!

You can customize the links on this page using the icons described below. These icons will appear when you hover over a link.

Click on the ★ to move a link to your favorites. These will appear on the top of the dashboard for easy access.

If you no longer need a link in your favorites you can click on the ❌. This will move the link back to its original category.

You can reorder links by dragging and dropping them to a new location.

OK
Click on Edit Employee Time to go to Manager Time Entry page.
Finding employee timesheets using **group list**

Becca Bluehen has three groups of employees. Click on **name** to reveal list of employees.

Click on **employee’s name** to open his/her timesheet.
Finding employee timesheets using **Find** button

Click **Find** button

**Last Name** or UD ID work best; enter complete name or partial with *

Choose the employee by clicking on the row
Reviewing a timesheet

- **View prior period timesheet** by clicking the arrow.
- **Home button** takes you to the UDTime Dashboard and links to other options.
- **List View button** select to see a timesheet by: List, Day or Table. Choose what works best for you.
- **Show all weeks checkbox** allows you to view one or both weeks of the pay period.
- **Employee name, UD ID, job title and department** display here.
Reviewing a timesheet

**Time Slice** is a work period defined by clock in and out times. A day can have more than one time slice.

### Possible Uses for Reviewed checkboxes

<table>
<thead>
<tr>
<th>Reviewed checkbox Role</th>
<th>Approval Role</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supervisor/Timekeeper</strong> examines timesheets periodically to verify and correct as needed and then marks each time slice as OK.</td>
<td><strong>Supervisor or Timekeeper</strong> The approval process at the end of the pay period goes quickly and smoothly.</td>
</tr>
<tr>
<td><strong>Purpose Code/Account Code Administrator</strong> examines timesheet periodically to verify Chartfields (funding) are correct and marks time slices as OK. Supervisor and Timekeeper do not have Purpose code authority.</td>
<td><strong>Supervisor or Timekeeper</strong> The timesheet edits are made by the Supervisor/Timekeeper; one will also approve them for the pay period.</td>
</tr>
<tr>
<td><strong>Supervisor/Manager</strong> examines timesheet, makes corrections and “signs-off” on each time slice to show his/her authorization.</td>
<td><strong>Timekeeper</strong> The timesheets approved by Timekeeper who has the authority to approve them.</td>
</tr>
</tbody>
</table>
Exceptions tab

Dates with problems are marked with a pin. The color corresponds to the severity of the issue.

See the Exceptions tab for details about the issue.

Exceptions tab

Red ones indicate hours that won’t be paid – you must fix the problem in the timesheet.
Results tab displays a summary of the timesheet for this pay period.

Default Hourly Rate that was entered on JED or Additional Assignment form.

Total hours

Estimated pay amount
Supervisors & Timekeepers

Work Study tab

Note: Two new Work Study Views will be available:
- Work Study Balance
- Work Study Browse

Work Study tab shows (if any) your work study award balance

Work Study Bank
- **Initial Balance** – award amount at the beginning of the current pay period
- **Credits** – additions to your award
- **Debits** – current pay amount deducted for this pay period (so far)
- **Ending Balance** – estimated award balance at the end of the current pay period
This view shows the Work Study awards for a given student by academic term.
A student can be paid for work study when:

Eligible = Yes
In verification = No

<table>
<thead>
<tr>
<th>UD ID</th>
<th>Student name</th>
<th>Semester</th>
<th>Eligible for work study</th>
<th>In verification</th>
<th>HR status</th>
</tr>
</thead>
<tbody>
<tr>
<td>700000001</td>
<td>Richard Alpert</td>
<td>Spring 2013</td>
<td>Yes</td>
<td>Yes</td>
<td>A</td>
</tr>
<tr>
<td>700000002</td>
<td>Kate Austen</td>
<td>Spring 2013</td>
<td>No</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>700000003</td>
<td>Ana Lucia Cortez</td>
<td>Fall 2013</td>
<td>Yes</td>
<td>No</td>
<td>A</td>
</tr>
<tr>
<td>700000004</td>
<td>Michael Dawson</td>
<td>Fall 2013</td>
<td>Yes</td>
<td>No</td>
<td>T</td>
</tr>
<tr>
<td>700000005</td>
<td>Juliet Burke</td>
<td>Fall 2013</td>
<td>Yes</td>
<td>No</td>
<td>T</td>
</tr>
<tr>
<td>700000006</td>
<td>Boone Carlyle</td>
<td>Fall 2013</td>
<td>Yes</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>700000007</td>
<td>Daniel Faraday</td>
<td>Fall 2013</td>
<td>Yes</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>700000008</td>
<td>Sawyer Ford</td>
<td>Fall 2013</td>
<td>Yes</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>700000009</td>
<td>Sayid Jarrah</td>
<td>Fall 2013</td>
<td>Yes</td>
<td></td>
<td>T</td>
</tr>
<tr>
<td>700000010</td>
<td>Jin-Soo Kwon</td>
<td>Fall 2013</td>
<td>Yes</td>
<td></td>
<td>A</td>
</tr>
</tbody>
</table>

**Eligible for work study**
- **Yes** = can be paid work study
- **No** = NOT awarded work study

**In Verification**
- **Yes** = Student has work study, but additional verification steps needed before dept. can pay as work study
- **No** = Not selected for verification, student can be paid as work study

**HR Status**
- **A (Active)** = Student has a primary job on campus
- **T (Terminated)** = Student must be rehired
- **Blank** = Student has never been employed by UD – start the new hire process
Editing Timesheets

This time slice is missing a clock-out time. You will enter the correct time. Then click the **Save** button – it will turn from orange to blue. And the Red Exception will go away.
Editing Timesheets — Missed Clock-out, Change Hourly Rate

HINT:
The missing a clock-out time of **01:45 pm** can be entered a couple easy ways:
- 145p
- 1345 (military time)

Then click the **Save** button

**Adj Reason** is the supervisor or timekeeper comment field. Use it to explain ANY change you make to a time slice. Be brief – you have 40 characters.

Click the **Save** button.

**Rate Override** is used to pay a different hourly rate than the default rate.

Rate Overrides require an explanation in the **Adj Reason**.

Click the **Save** button

(NOTE: Default Hourly Rate can be found in the Results tab.)
Supervisors & Timekeepers

Editing Timesheets – Change Chartfields

For example, change the Speed Type:
- Click in the box
- Type the entire value
- Or type the beginning of the code (STDT11) to reveal a list to choose from
- Click Search for STDT11

In the Search Results box, click on the Speedtype to select it.

Change/add these chartfields if needed:
- Project/Grant (rare)
- Speed Type
- Account
- Class
- User Field

Note: Only edit is validity of codes. There is no security checks on Speedtype or Chartfields - change them with great care!
**Editing Timesheets – Split funding between two Speed Types**

To split funding for a time slice, you will add another time slice and allocate the **Hours** between the two **Speed Types**.

In this example the 5 hours on 6/18 will be split 50-50 between CWSP362199 and HRSA110000

1. Click the **Add** button on 6/18
2. This creates a new 6/18 time slice with no hours under the first one
3. Edit the **Hours** of the two time slices by typing the times in bold:
   - **12:01pm** and **2:30pm**
   - **2:30 pm** and **5:00pm**
4. Click the box and change the **Speed Type** on the second row to **HRSA110000**
5. Click the **Save** button
Deleting a time slice that does not belong to your department.

1. You must add a brief comment in **Adj Reason** explaining why you are deleting the time.
2. Click **Save** button (very important for audit trail)
3. Click the down arrow next to the **Add** button to reveal action list
4. Choose **Delete Row**
5. Click **Yes** to confirm deletion
6. Click the **Save** button (again)

**IMPORTANT:**
Alert the employee about the deleted hours. S/he must contact other supervisor to add hours to a timesheet in correct department.
Log-into UDTime and the CAS screen as usual

Select the group to approve by clicking on your name

Note:
As Supervisor or Timekeeper, if you have not approved timesheet by Friday near the end of a pay period, you and the employees will get reminder emails from the UDTime system on Friday, Sunday and Monday morning until they are approved.
Approving Timesheets

This is a list of your employees with hours in the current pay period. You can choose to:
- Approve timesheets
- Open and edit timesheets
- Reject a timesheet

Click employee name to open and edit a current timesheet. Make any necessary edits and click Save and Close button to return Approve Time Sheets page.

Approve timesheets:
All at the same time with Approve All button
OR
One at a time with Manager's Approval checkbox

Approved timesheets have green check marks.

Note: Exceptions will be noted and Errors (no pay) will display as red. Warnings will be yellow and don’t stop pay.
Employee’s Approved Timesheet

This is the employee’s timesheet after it was approved by his manager.

This data was already approved by BLUEHEN, BECCA. Changes not allowed.

Changes can no longer be made to it.
If the employee accesses the approved timesheet, he will see this message.
Rejecting a Timesheet

There are times when you must stop a timesheet being paid, this is how.

1. On the Approve Timesheet page, click the Reject button.

2. The Reject Time Sheet window
   If the employee has an email on file, you will send an email notification. Enter details about the rejected timesheet. Click the Send button to notify the employee of the rejection.

3. On the Approve Timesheet page, the Approve button indicated the timesheet has been rejected.

4. The Reject Time Sheet window
   I am rejecting your timesheet due to unresolved errors that you did not give explanation about. I emailed 5 times and called 2x.
Un-Rejecting a Timesheet

There are times when you can resolve outstanding issues for a rejected timesheet.
You may APPROVE it up until Payroll deadline for the person to be paid.
(Generally Monday after pay period ends, at noon.)

1. Click the Approve button
2. The green checkmark on the Approve button indicates the timesheet is now fine to pay.
Amending a Timesheet

Reasons include:
1. Missed pay
2. Rejected timesheet that gets resolved too late
3. Wrong hourly pay rate
4. Wrong hours (too few or too many)

Procedure:
1. Complete this form (on Payroll website)
2. Payroll reviews/approves your request
3. Amended timesheet created by Payroll in UDTime
4. Supervisor/timekeeper logs into UDTime
   • Locate employee’s timesheet in prior pay period
   • Make changes as needed and enter Adj. Reason
   • Save timesheet
   • APPROVE timesheet
   • Save Approval
5. Amended timesheet processed in current pay period

Note: Funding Changes must still be corrected by a Journal Voucher, not on an amended timesheet.
Alternatives when additional approvers needed

1. Supervisor - Review checkbox (covered on page 12)

2. Timekeeper/Supervisor – Employee Timesheet
   - More button – Print
Alternatives when additional approvers needed

3. Timekeeper/Supervisor – UDTime Dashboard

- View General Reports
- Timesheet Reports
- Timesheet with signature
Alternatives when additional approvers needed

Timesheet with Signature

Generate Output:
Excel – opens Excel with timesheet data
HTML – timesheet viewable as a webpage
PDF – creates PDF version of the timesheet
Alternatives when additional approvers needed

Timesheet with Signature

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Time Sheet Version</th>
<th>Work Date</th>
<th>Pay Code</th>
<th>Start</th>
<th>End</th>
<th>Hours</th>
<th>Comments</th>
</tr>
</thead>
</table>

Total Hours:
Employee’s Signature:
Approver’s Signature:
UDTime
More reports are coming!
New
Bi-Weekly Payroll Schedule
for Misc. Wage and UG Student
starting in August

Payroll Deadline:
Early in the day on Mondays
(Look for email from Payroll in late July with details)
Questions?

Email: time-attend-users@udel.edu

Website: www.udel.edu/udtime