State Accounting Office of Georgia

Job Aid – Time and Labor Manager Training

Training Guide for Manager and Their Responsibilities for Time and Labor

Created
1/29/2019

Contents

Introduction

This document provides guidance for managers with direct reports using the Teamworks Time and Labor system.

Revisions to This Document

As agencies continue to be added to the Time and Labor system, changes will be made to this document. All changes made to this document will be identified in the table below.

Date	Section	Description of Change
01/29/2019	Initial Document	Initial Document

How to Access My Personal Timesheet

Use the following navigation to display your current personal timesheet.

SELF SERVICE > TIME REPORTING > REPORT TIME > TIMESHEET

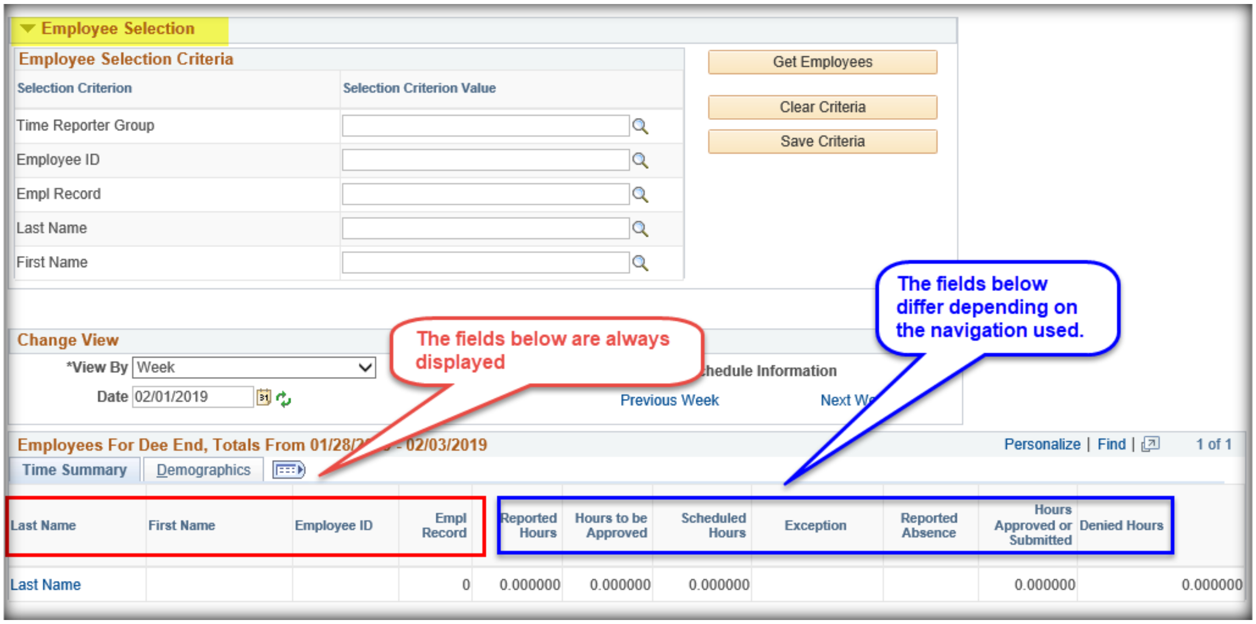
- Your current timesheet will be displayed

Note: Follow the instructions in the Job Aid Time and Labor How to Report Time on an Elapse Timesheet

How to Use the Manager's Employee Selection Screen

The **Employee Selection** screen is used by many of the manager navigations. It allows the manager options for accessing their direct reports. This section will provide instructions for this screen.

Below is an example of an **Employee Selection** screen.



Get Employees Button

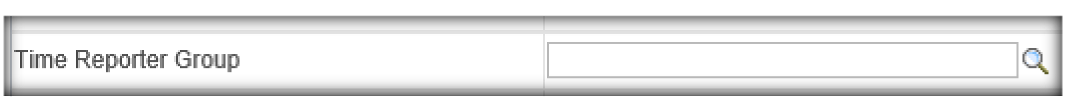
1. Click the **Get Employees** button

   ➢ The screen will be updated with a list of your direct reports meeting the criteria at the bottom of the screen

2. Click on the **Last Name** of the employee to display the employee's timesheet

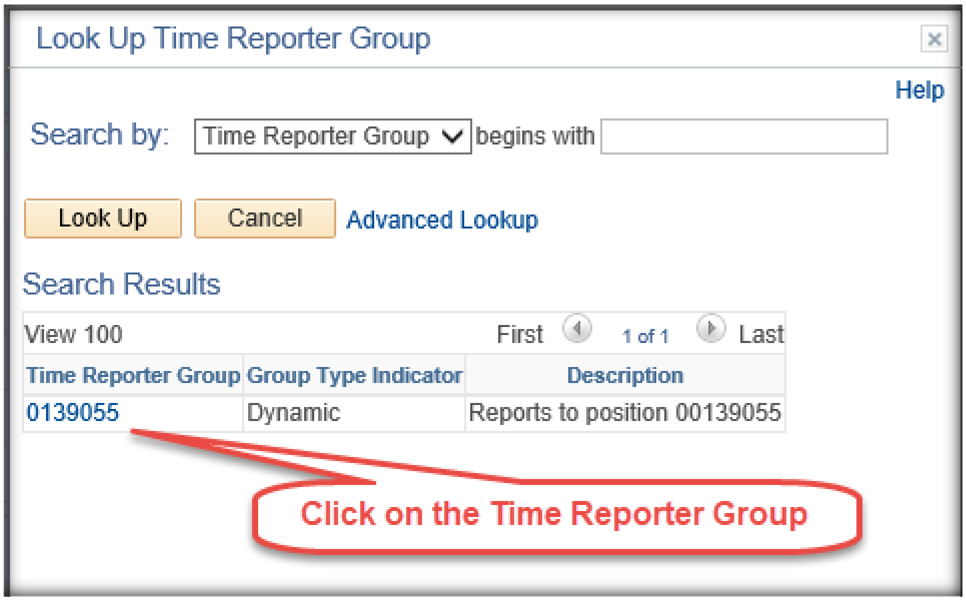
Time Reporting Group Field

Managers have a Time Reporter Group based on the Manager's Position Number. The Time Reporting Group is updated nightly with active employees with the Manager's Position Number listed as their Reports To (position) on Job. The Time Reporting Group is the Manager's Position Number with the leading character omitted (i.e., Position Number is 00139055, Time Reporter Group ID is 0139055).



1. Click in the **Time Reporter Group** field and enter your Time Reporter Group
2. If you do not know your Time Reporter Group, click the **Magnifying Glass** icon by the **Time Reporter Group** field

   ➢ The following screen will be displayed



3. Click on the appropriate **Time Reporter Group**

   Note: Most managers will see one Time Reporter Group. If you are a Timekeeper or are a Proxy for another manager, you will see more than one Time Reporter Group. Additional information regarding Delegation of Authority and Timekeepers are provided later in this document

   ➢ The **Time Reporter Group** field will be populated with the selected Time Reporter Group

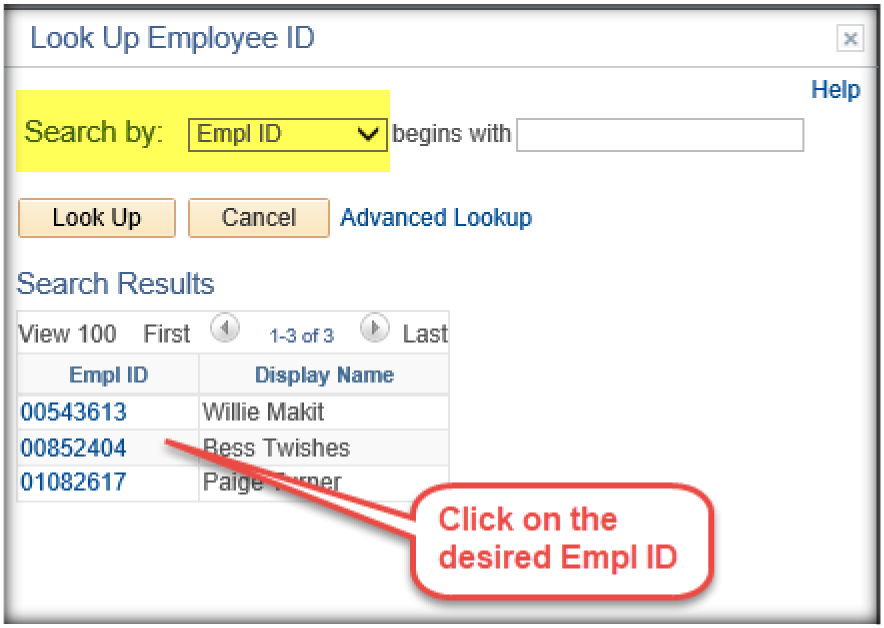
4. Click the **Get Employees** button

   ➢ The screen will be updated with a list of your direct reports meeting the criteria at the bottom of the screen

5. Click on the **Last Name** of the employee to display the employee's timesheet

Employee ID Field

1. Click in the **Employee ID** field and enter the Empl ID or if you do not know the Employee ID, click the **Magnifying Glass** icon by the **Employee ID** field
   - A list will be displayed of the Employee IDs you have access to



2. Click on the appropriate Empl ID
   1. The selected Empl ID will be displayed in the **Employee ID** field
3. Click the **Get Employees** button
   - The screen will be updated with the employee at the bottom of the screen
4. Click on the Last Name of the employee to display the employee's timesheet

Last Name and/or First Name Fields

1. Click in the **Last Name** field and enter the employee's Last Name (not case sensitive)) or click the **Magnifying Glass** icon by the **Last Name** field to display a list of Last Names you have access to.

- A list will be displayed of the Last Names you have access to

2. Click on the appropriate Last Name

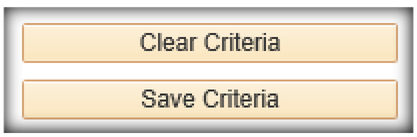
   - The selected Last Name will be displayed in the **Last Name** field

3. Click the **Get Employees** button

4. Click on the Last Name of the employee to display the employee's timesheet

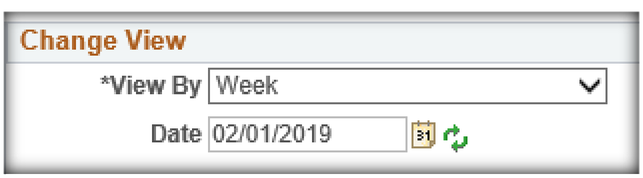
   Note: Follow the same instructions for the **First Name** field

Clear Criteria and Save Criteria Buttons



Use the **Save Criteria** and **Clear Criteria** buttons to save and clear criteria on the **Employee Selection** screen.

Change View Section



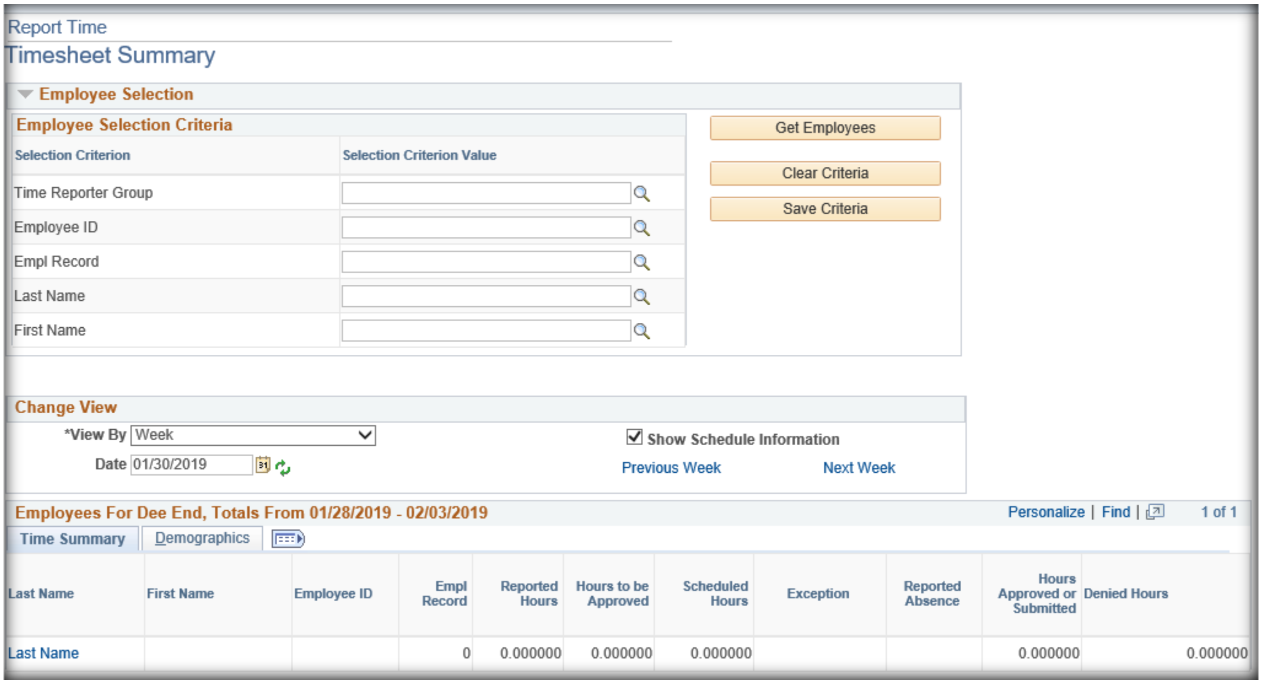
Instructions for the Change View section is included in the individual sections of this document. The functionality of this section is not always the same.

How to Access My Direct Reports Timesheets

Use the following navigation to display your direct reports' timesheets.

MANAGER SELF SERVICE > TIME MANAGEMENT > REPORT TIME > TIMESHEET

- The Timesheet Summary screen will be displayed



Time Summary Section

The **Time Summary** section is at the bottom of the screen. It is updated when the **Get Employees** button or the **Refresh** icon is selected.

The hours displayed in each of the fields are based on the value in the **View By** field

VIEW BY FIELD	DESCRIPTION OF VALUE DISPLAYED
Week	Seven days with the date in the **Date** field being day number one
Day	Date in the **Date** field

Below are the unique fields displayed on the Timesheet Summary screen

FIELD	DESCRIPTION OF VALUE DISPLAYED
Reported Hours	Total number of hours reported for the timeframe. The hours do not include accrued hours or earned Comp / Leave hours.
Hours to be Approved	Total number of hours in Needs Approval status
Scheduled Hours	Based on the employee's schedule assignment in Time and Labor, the total number of hours scheduled to work
Exception	If the employee has an exception for the period, the Exception icon will be displayed.
Reported Absence	Not used

FIELD	DESCRIPTION OF VALUE DISPLAYED
Hours Approved or Submitted	Total number of approved hours. The hours do not include accrued hours or earned Comp / Leave hours.
Denied Hours	Total number of Denied Hours

How to Use the Change View Section

The ***View By** field on this screen provides the ability to select Day or Week.

1. Leave the default option Week as both options result in the same timesheet displayed

The **Dat**e field on this screen provides the ability to change the date for the View By period

Timesheets are displayed by Calendar Period and include the date in the **Date** field (i.e., in the example above, the timesheet for the Calendar Period that includes 1/30/2019 will be displayed. If the employee's calendar period is Sunday to Saturday, the timesheet from 1/27/2019 through 2/2/2019 will be displayed.).

2. Change the date in the **Date** field to the desired date

   Note: Refer to the appropriate Job Aid for Entering Time on Timesheets for options to update the Date field

3. Click the **Refresh** icon or **Get Employees** button

   - A list will be displayed of the Last Names you have access to

4. Click on the Last Name of the employee to display the employee's timesheet

   - The timesheet for the selected employee that includes the date from the **Date** field will be displayed

Displaying Your Direct Reports' Timesheets

Use one of the options in section How to Use the Manager's Employee Selection Screen to display your direct reports' timesheet.

Navigation Options for Displaying Timesheets

The following options are available to display different timesheets for your direct reports.

Date Field on the Timesheet

Once a timesheet has been displayed, the **Date** field can be updated to display another timesheet for the employee.

1. Change the date in the **Date** field to the desired date

   Note: Refer to the appropriate Job Aid for Entering Time on Timesheets for the options to update the Date field

2. Click the **Refresh** icon

   ➢ The timesheet that includes the date from the **Date** field will be displayed

Previous Period and Next Period Links

Once a timesheet has been displayed, the following links are displayed at the top right-hand side of the timesheet

- Click the **Previous Period** link to display the timesheet for the ***previous*** Calendar Period for the current employee displayed

- Click the **Next Period** link to display the timesheet for the ***next*** Calendar Period for the current employee displayed

Previous Employee and Next Employee Links

Once a timesheet has been displayed, the following links are displayed at the top right-hand side of the timesheet if multiple employee names were listed on the **Timesheet Summary** screen.

- Click the **Previous Employee** link to display the timesheet for the same Calendar Period for the ***previous*** employee in the list displayed on the **Timesheet Summary** screen

- Click the **Next Employee** link to display the timesheet for the same Calendar Period for the ***next*** employee in the list displayed on the **Timesheet Summary** screen

Approving Timesheets

Overview

Once an employee enters and submits their time entries on their timesheet, the entry must be **reviewed** and **approved** by the manager to be processed by the nightly Time Administration process. It is of ***high importance*** that timesheets entries are **reviewed** and **approved** in a timely manner. Unapproved timesheets can affect an hourly employees' pay and salaried employees' Leave / Compensatory balances.

Time and Labor offers two options for approving timesheet entries. This document will provide instructions for each. It is up to the manager to determine the method that works best for them.

Option 1 - Approving Timesheets Using Report Time Navigation

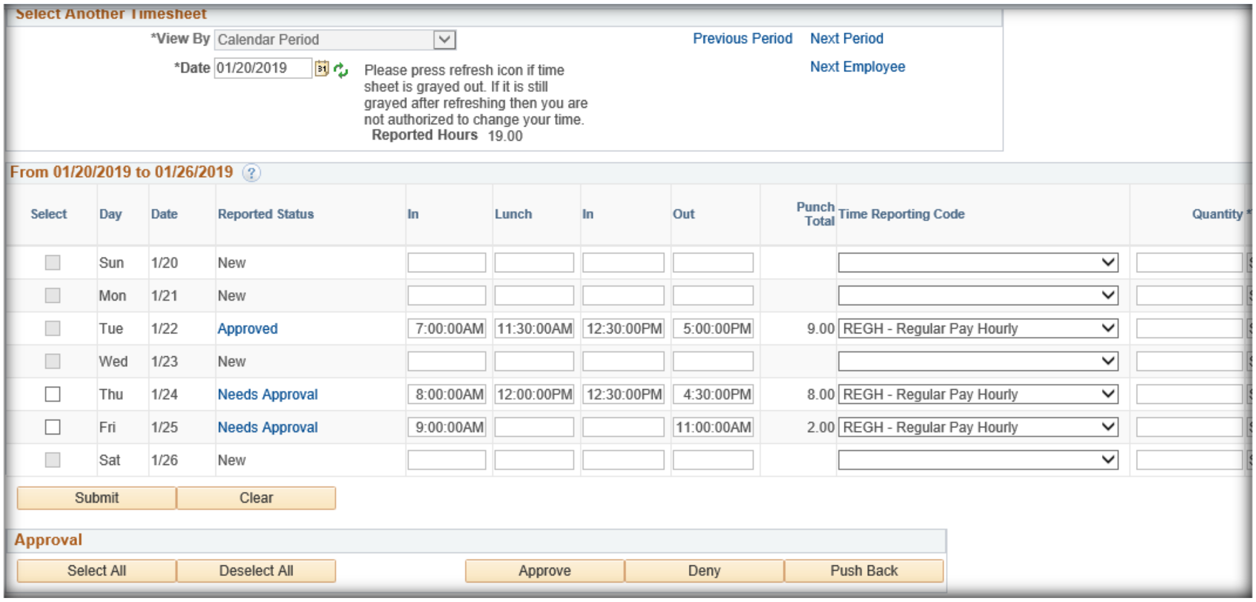
Option 1 provides instructions for approving timesheet entries using the following navigation. This is the same navigation as described in the above section How to Access My Direct Reports Timesheets.

MANAGER SELF SERVICE > TIME MANAGEMENT > REPORT TIME > TIMESHEET

After displaying the timesheet and reviewing for accuracy, follow the steps below to approve timesheet entries.

> **Note:** If changes are required on the timesheet, do ***NOT*** click the **Push Back** or **Deny** button, skip to How to Correct Timesheets.

In the example below, Thursday, 1/24 and Friday, 1/25 have been reviewed and are ready to be approved.



1. Place the cursor over the **Select** checkbox and click or

   ➢ A check will be placed in the checkbox

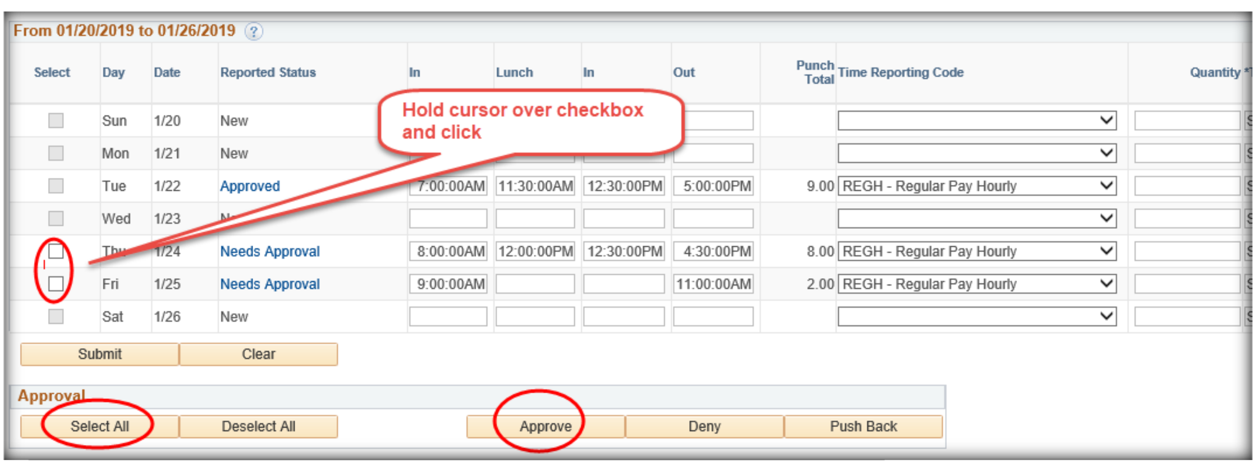
2. Click the **Select All** button in the **Approval** section

   ➢ A check will be placed in all the checkboxes

   Note: if you do not wish to approve all rows, do not use this method; click in the individual checkbox(es).

3. After the appropriate checkbox(es) have been checked, click the **Approve** button

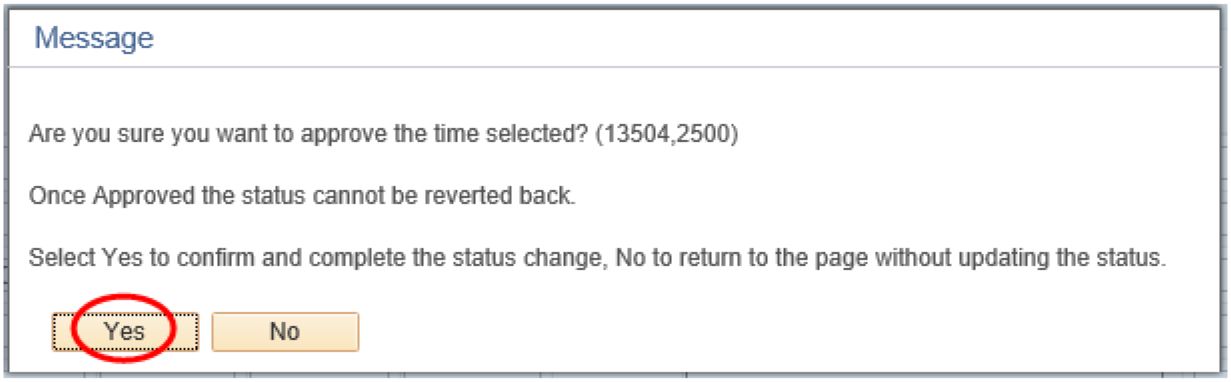
   Note: if an entry is incorrect, do ***NOT*** click the **Push Back** or **Deny** button; skip to [How to Correct Timesheets](#).



➢ A message will be displayed asking if you are sure you want to approve the time selected

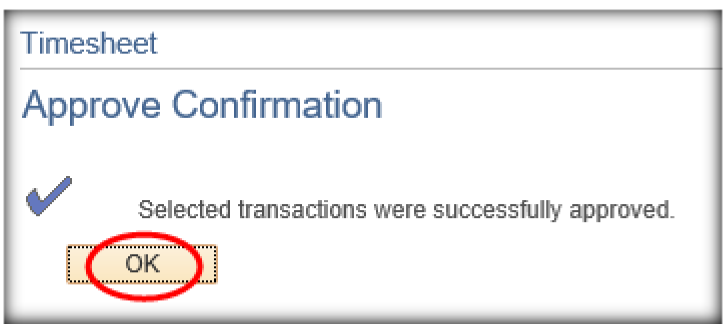
4. Click the **Yes** button to continue with the approval

5. Click the No button to Not approve and go back to the timesheet screen

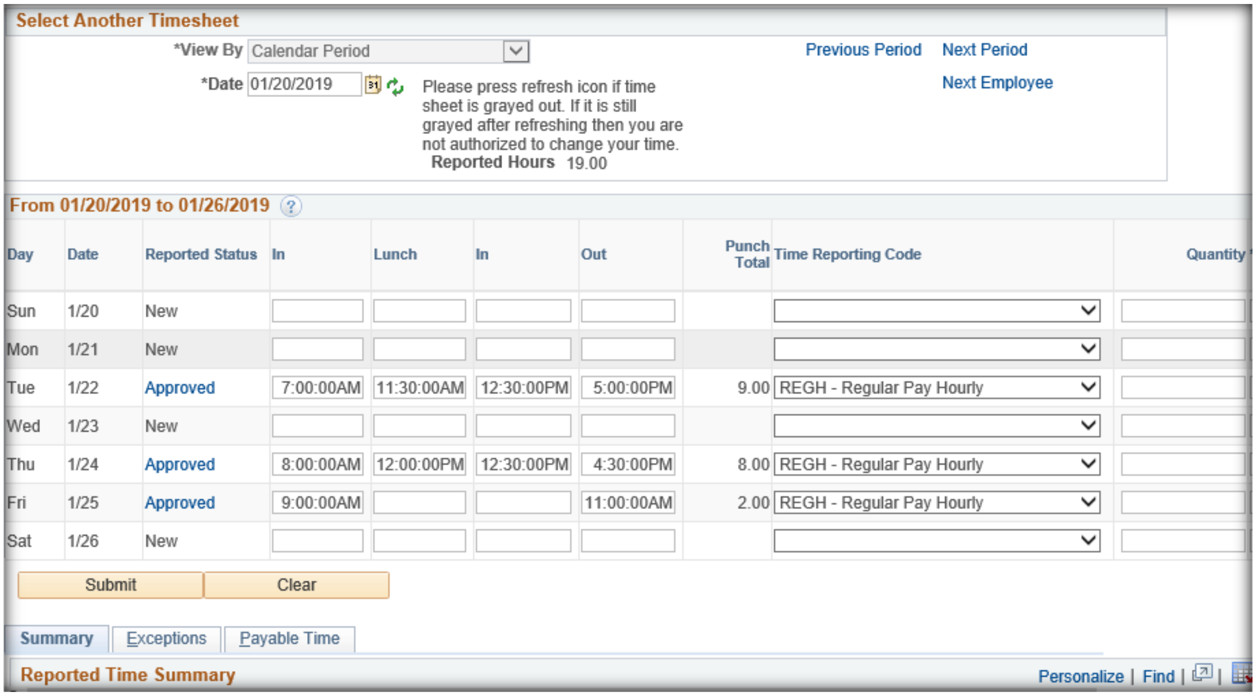


➢ An OK page will be displayed acknowledging the rows have been approved.

6. Click **OK** button



➢ The timesheet will be displayed with the timesheet entries approved.



Select Another Timesheet

*View By Calendar Period

*Date 01/20/2019

Please press refresh icon if time sheet is grayed out. If it is still grayed after refreshing then you are not authorized to change your time.

Reported Hours 19.00

Previous Period | Next Period

Next Employee

From 01/20/2019 to 01/26/2019

Day	Date	Reported Status	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity
Sun	1/20	New							
Mon	1/21	New							
Tue	1/22	Approved	7:00:00AM	11:30:00AM	12:30:00PM	5:00:00PM	9.00	REGH - Regular Pay Hourly	
Wed	1/23	New							
Thu	1/24	Approved	8:00:00AM	12:00:00PM	12:30:00PM	4:30:00PM	8.00	REGH - Regular Pay Hourly	
Fri	1/25	Approved	9:00:00AM			11:00:00AM	2.00	REGH - Regular Pay Hourly	
Sat	1/26	New							

Submit | Clear

Summary | Exceptions | Payable Time

Reported Time Summary

Personalize | Find

To display another timesheet, follow the steps in Navigation Options for Displaying Timesheets

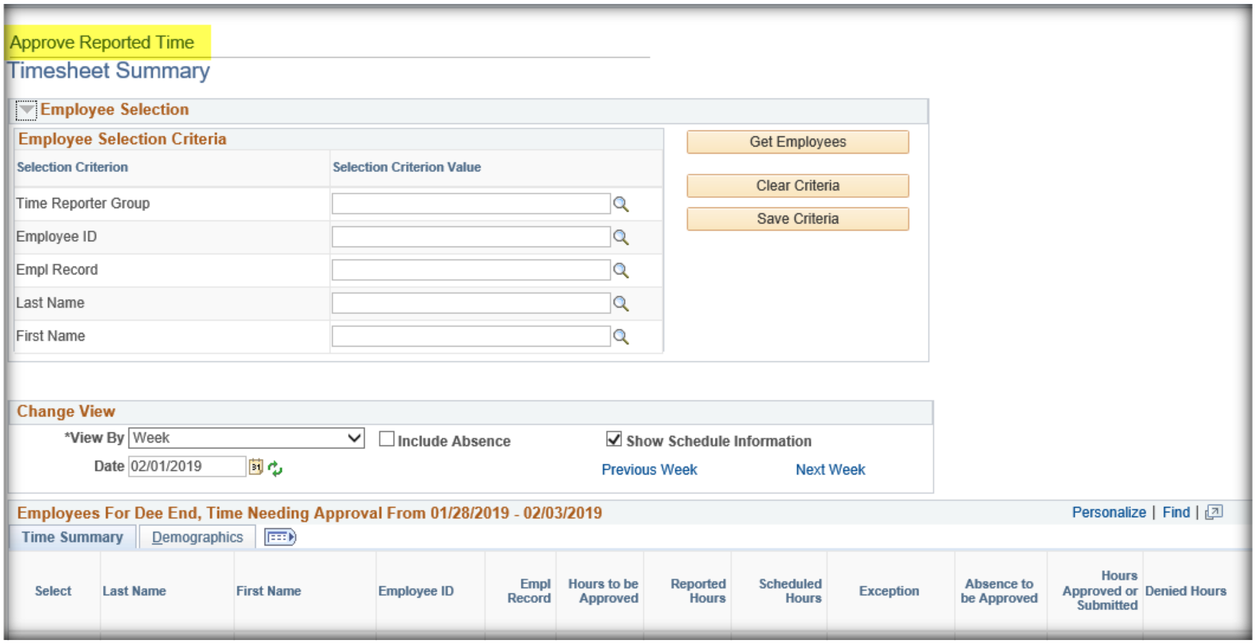
Option 2 - Approving Timesheets Using Approve Time and Exceptions Navigation

Option 2 provides instructions for approving timesheet entries using the following navigation.

MANAGER SELF SERVICE > TIME MANAGEMENT > APPROVE TIME AND EXCEPTIONS > REPORTED TIME

Using Option 2 will display the name(s) of employees who have a least one entry in Needs Approval status and matches the criteria entered.

Below is the **Approve Reported Time** screen



1. Refer to the section How to Use the Manager's Employee Selection Screen to complete the **Employee Selection Criteria.**

2. Click the drop-down arrow by the ***View By** field and select one of the following options.

*VIEW BY	RESULTS WILL BE DISPLAYED FOR EMPLOYEES MEETING CRITERIA
All Time After	All time after the date in the **Date** field
All Time Before	All time before the date in **Date** field
Day	All time for the date in the **Date** field
Week	All time for the week beginning with the date in the **Date** field. Caution, if the employee does NOT have any time reported on the date in the Date field, they will not be displayed (see example below).

Notes:

- If the employee does not have at least one entry meeting the criteria, their name will not be displayed at the bottom of the screen. This does NOT mean you do not have access to the employee; it simply means they do not have data meeting the criteria entered.

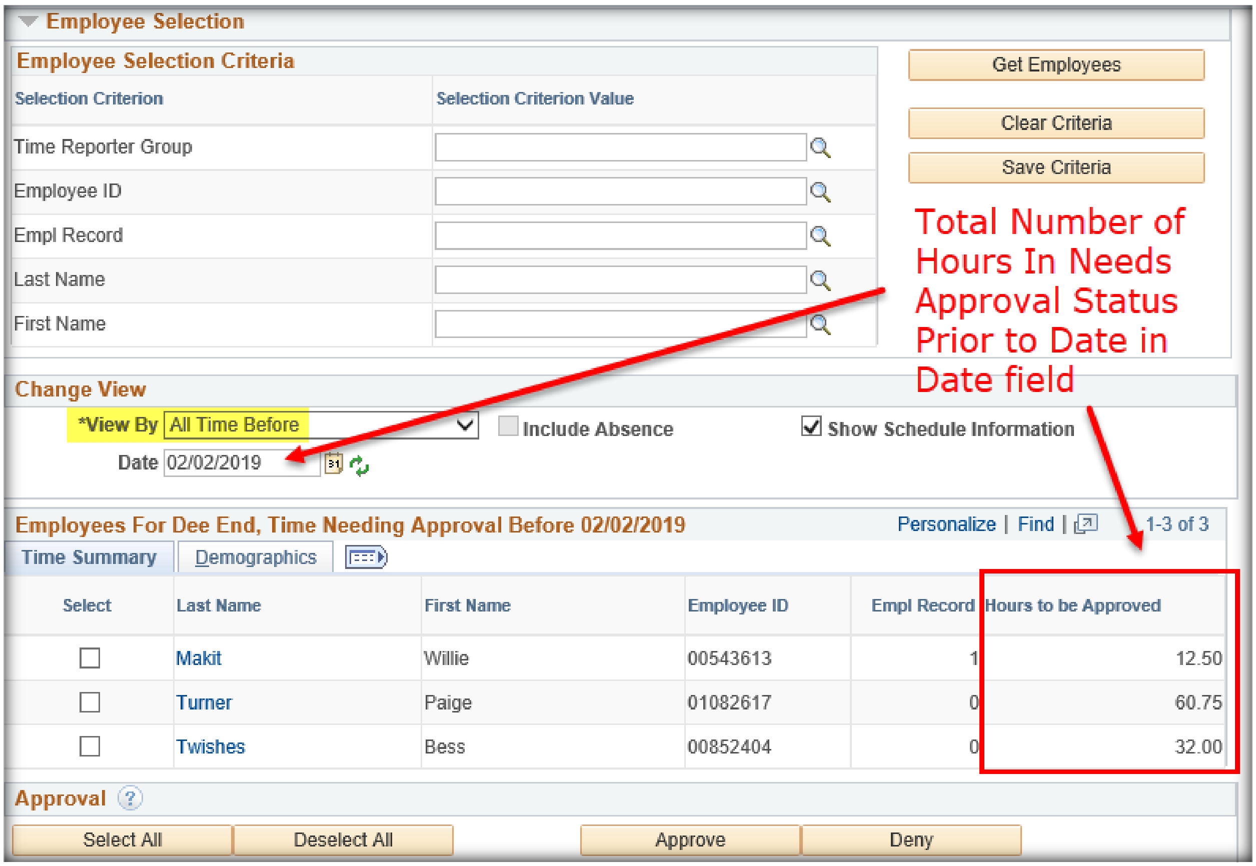
- If the manager does not have access to approve the entry (Approval in Progress), the employee will not be displayed.

3. Click the **Date** field to make changes to the date.

4. Click the **Get Employees** button

➢ Employees meeting the criteria will be displayed at bottom of the screen.

Below is an example using *View By All Time Before 02/02/2019. Notice the Hours to be Approved field is the total number of hours in Needs Approval status.



*Do **NOT** click in the **Select** checkbox to approve the hours PRIOR to reviewing the timesheets for accuracy.*

5. Click on the Last Name of the employee to display the employee's timesheet to review for accuracy. If the number of hours on the timesheet to be approved are less than the number on the above screen, you will need to display previous timesheets to find all entries needing approval.

6. After approvals are completed, click the **Return to Select Employee** link at the bottom of the screen to return to the Results screen.

Approving Timesheets for Future Dates

Timesheets for future dates should NOT be approved until the date has passed and the entry is accurate. Remember, the note below that is included in Job Aids for employees reporting their time.

> **Note**: *Timesheets are NOT used for 'requesting' leave time. Employees should communicate with their manager for approval to take leave. Agencies will determine their policy and provide instructions to employees for requesting leave. Timesheets are for reporting actual Leave Time Taken.*

If an employee communicates with their manager and it is agreed the employee may have the time off, the employee can enter the time on the future date.

- The future date hours will be included in any additional time off calculations entered with the same TRC.

- The hours should NOT be approved until the date has passed and the employee does take the time off.

How to Correct Timesheets

When an error is found on an employee's timesheet, do NOT use the Push Back or Deny button. Communicate with the employee and determine what the correct entry should be. The employee should correct the timesheet and Submit. Once the change is made, the timesheet should be reviewed and approved.

> **Note:** If the Push Back or Deny button is selected, there is not an email sent to the employee. The employee will not know unless you communicate with them.

Manager Emails

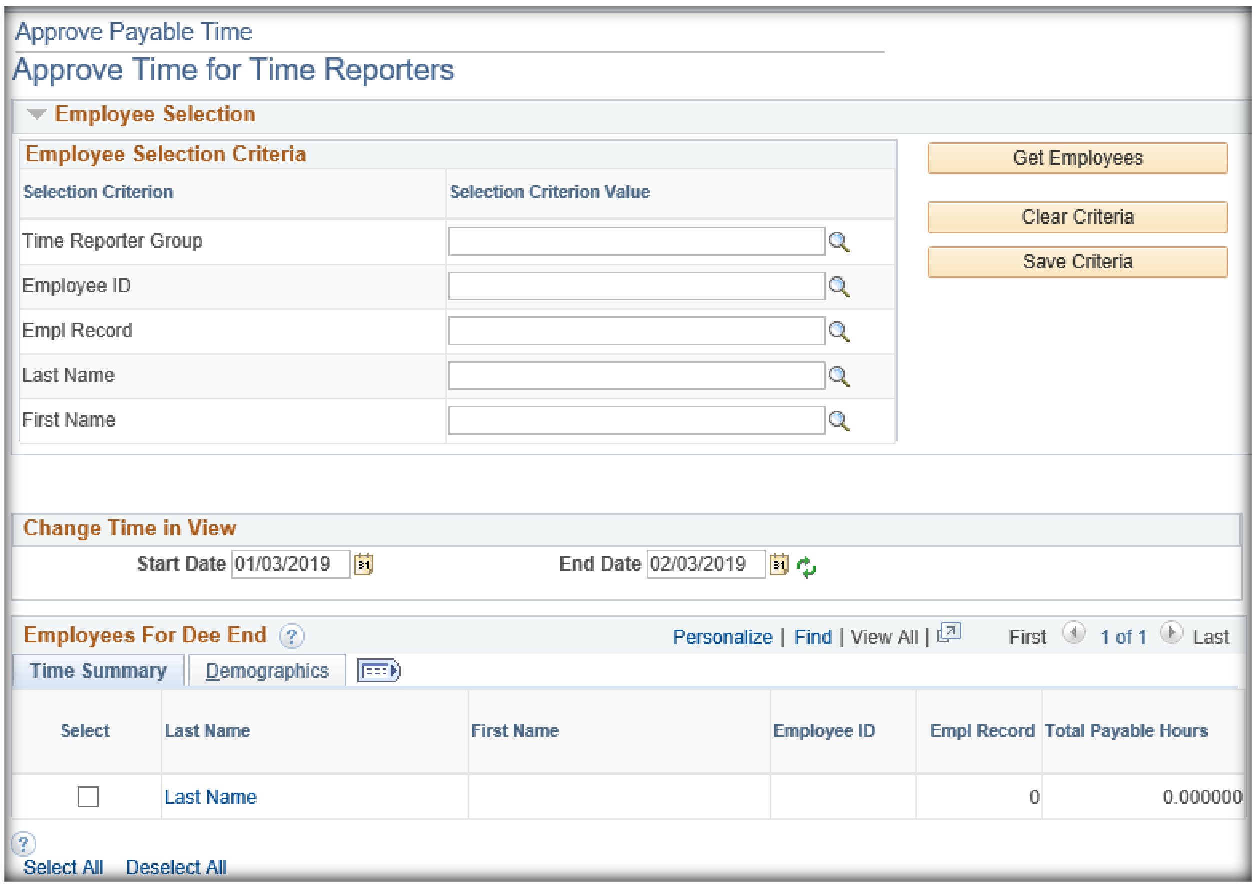
Timesheet entries can be approved on a daily or weekly basis. Your agency will provide their schedule for approving timesheets. Automated emails are sent to managers based on the agency's desired schedule. The emails provide a list of employees with hours ready to be approved for dates within the last 45 days.

How to Approve Payable Time

All overtime payable time hours must be approved by the manager to be loaded to Payroll to be included in the employee's paycheck. If the hours are not approved, employees will not be paid for the hours. Use the following navigation to display payable time in Needs Approval status.

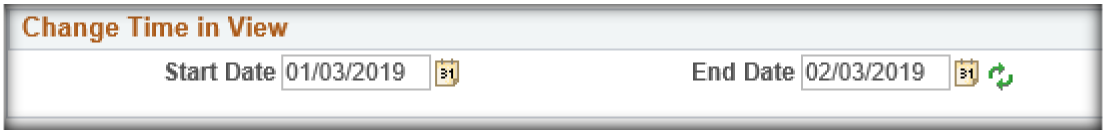
MANAGER SELF SERVICE > TIME MANAGEMENT > APPROVE TIME AND EXCEPTIONS > PAYABLE TIME

Below is the **Approve Payable Time** screen



1. Refer to the section How to Use the Manager's Employee Selection Screen to complete the **Employee Selection Criteria.**

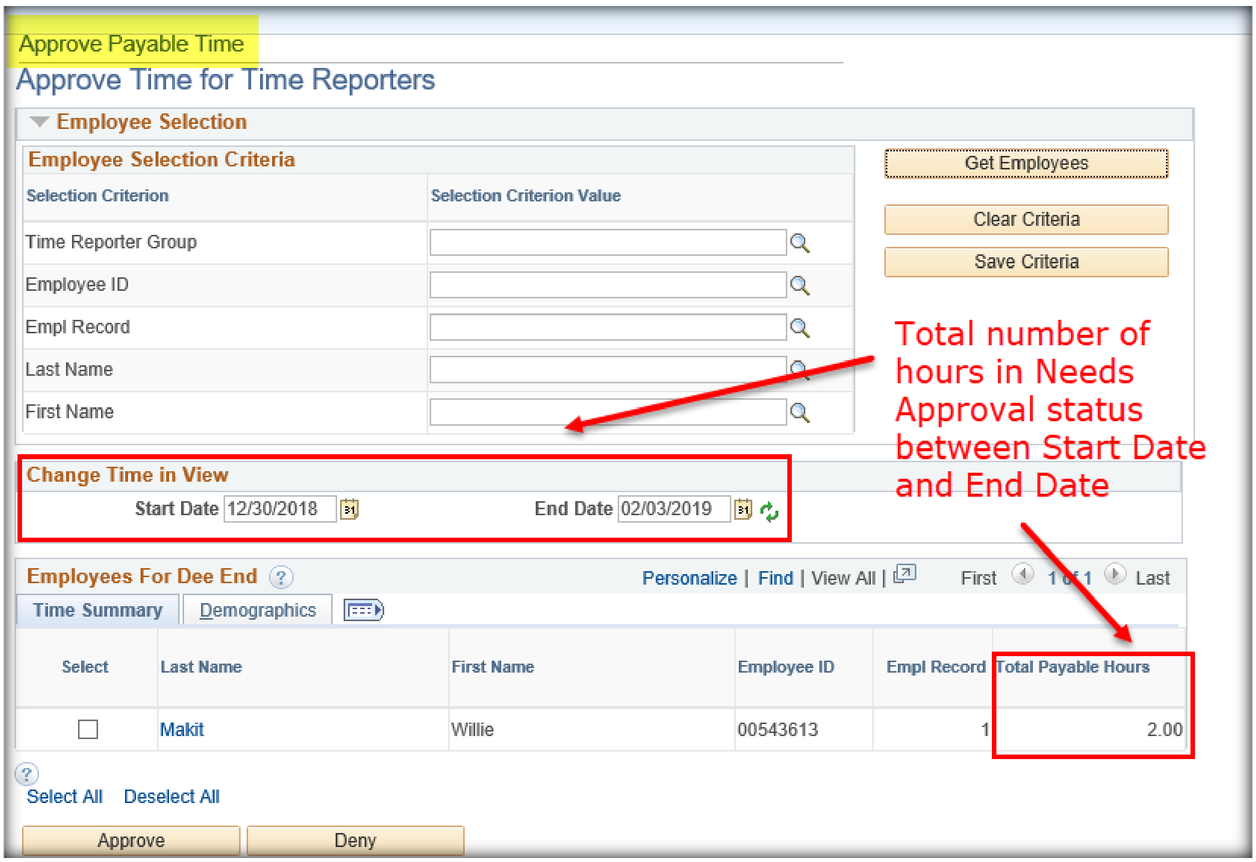
2. Enter the Start Date in the **Start Date** field
3. Enter the End Date in the **End Date** field



4. Click the **Get Employees** button

➢ Employees meeting the criteria will be displayed at bottom of the screen.

Below is an example using the date range from 12/30/2018 through 2/3/2019. Notice the **Hours to be Approved** field is the total number of hours in Needs Approval status.



*Do **NOT** click in the **Select** checkbox to approve the hours PRIOR to reviewing the payable time for requiring approval.*

5. Click on the Last Name of the employee to display the employee's payable time requiring approval.

6. If the payable time hours are correct, hold the cursor over the **Select** checkbox and click or

   ➢ The checkbox will be checked

7. If the payable time hours are not correct, click the **Adjust Reported Time** link to display the timesheet. Refer to the section How to Correct Timesheets for instructions to correct the timesheet. Once the timesheet has been corrected, approved and processed by Time Administration, the payable time hours will be corrected.

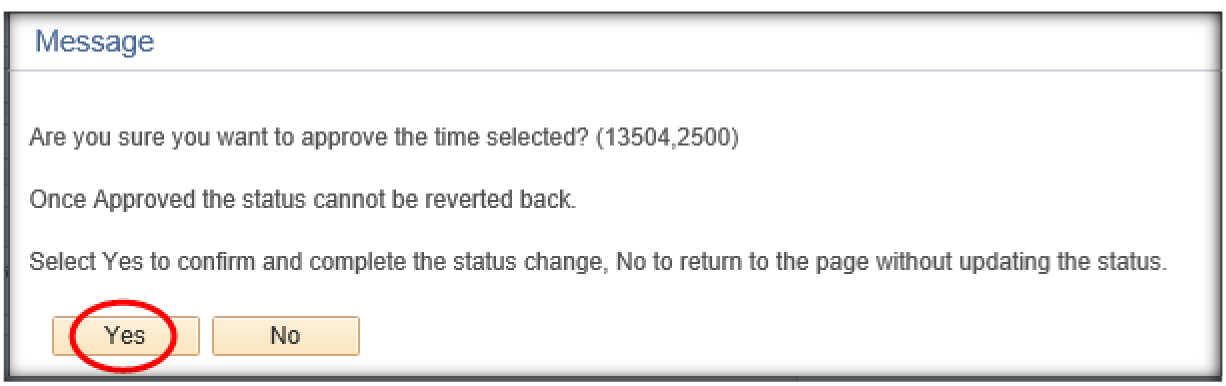
8. Click the **Select All** button

   ➢ All checkboxes will be checked

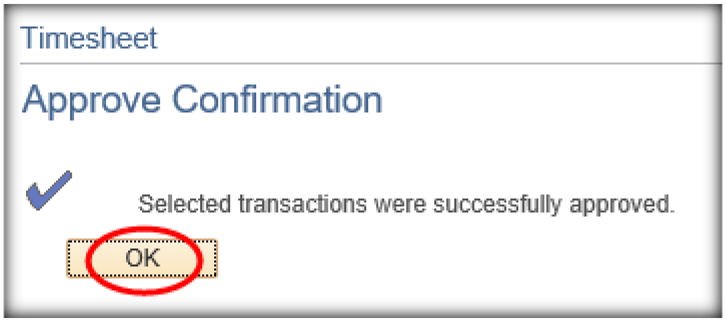
9. Click the **Approve** button

10. Click the **Yes** button to continue with the approval

11. Click the No button to Not approve and go back to the approval screen



12. Click **OK** button



13. After approvals are completed, click the **Return to Approval Summary** link at the bottom of the screen to return to the Results screen.

When Do I Need to Approve Timesheets and Payable Time?

It is recommended for timesheets to be approved on a weekly basis. Employees should have all time entries completed by noon on Mondays for the prior week. Managers should have all timesheet entries approved by end of day Monday or Tuesday. Payable Time should be approved the following day.

Remember, your agency will provide their schedule for approvals.

Exceptions

What is an Exception?

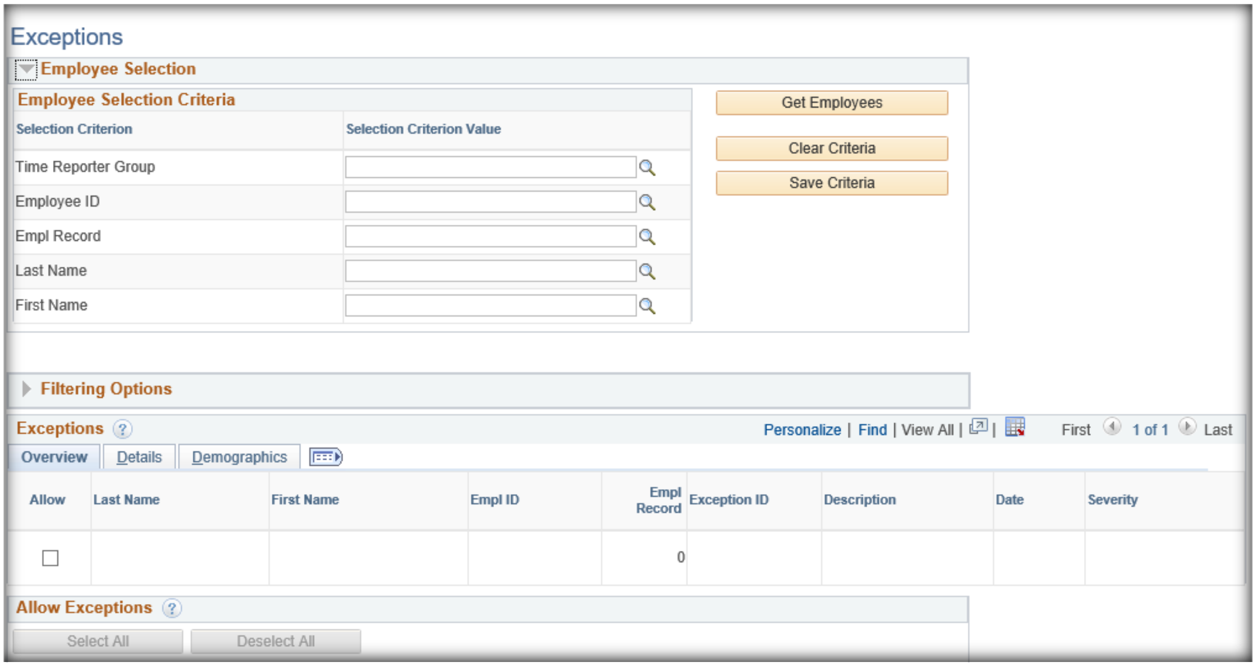
An Exception is created in Time and Labor when timesheet entries do not pass all Time Administration edits or it is unable to process the row. (i.e., timesheet is missing a Punch entry or a Leave balance has been exceeded). Payable Time is not created for dates with an Exception.

How to Identify Exceptions

Use the following navigation to identify Exceptions

MANAGER SELF SERVICE > TIME MANAGEMENT > APPROVE TIME AND EXCEPTIONS > EXCEPTIONS

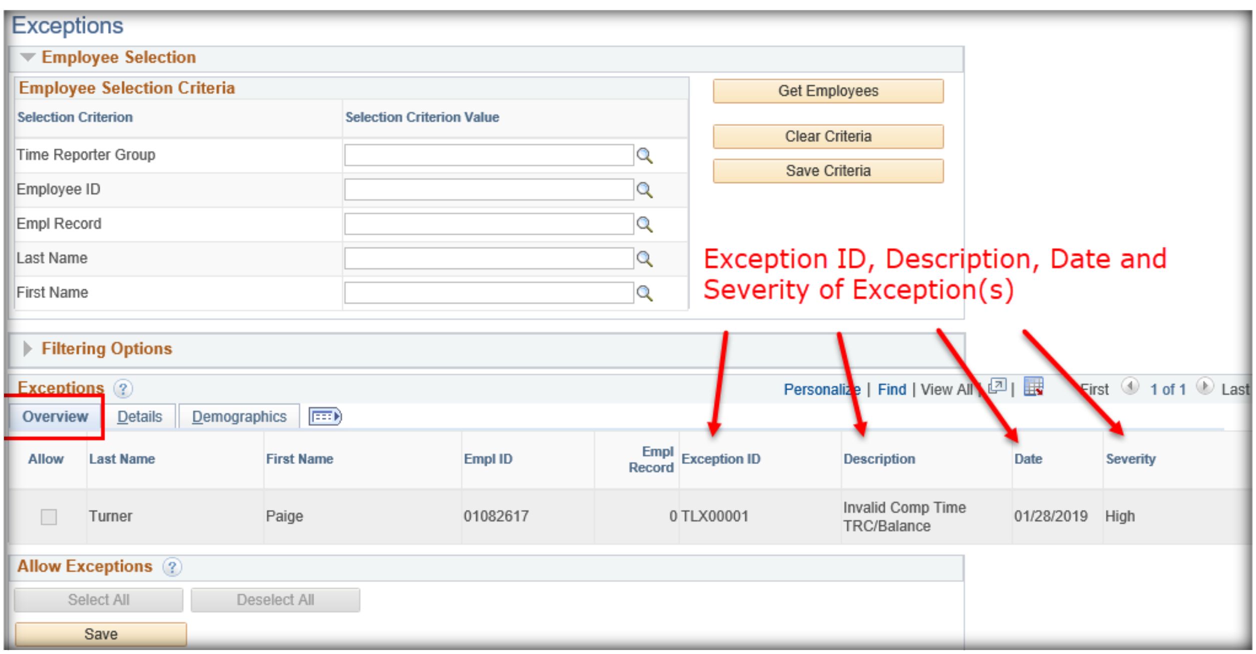
➢ Below is the **Exceptions** screen



1. Complete the **Employee Selection Criteria**

2. Click the Get **Employees** button

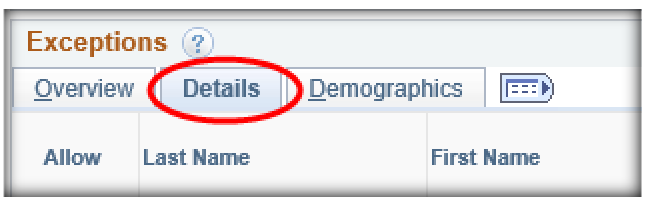
Below is an example of an employee with an Exception on 1/28/2019. The Exception is for an Invalid Comp Time TRC/Balance



There are two levels of Severities of Exceptions; a High Exception and a Low Exception

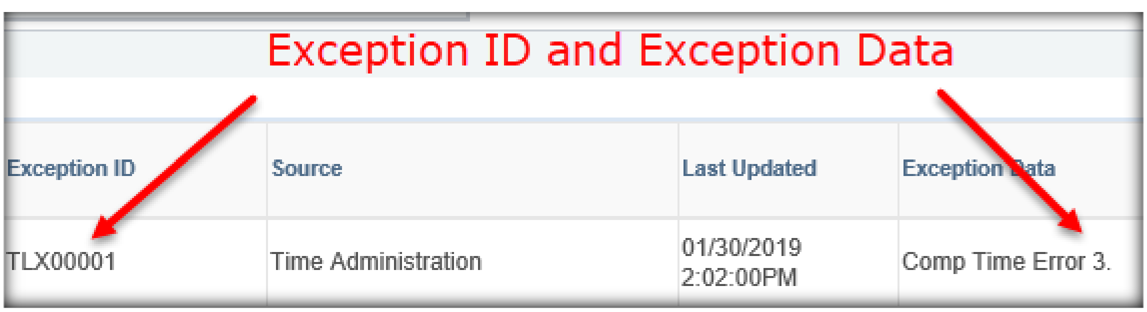
SEVERITY	DESCRIPTION
High	• Timesheet must be corrected and approved • Time Administration must run after timesheet is corrected and approved. If all edits pass, Exception will be cleared. • No payable time is created for the date with the Exception
Low	• Exception is for information purposes only and MUST be acknowledged by the manager. • Exception is cleared when manager acknowledges. Time Administration does not need to run to clear the Exception • Payable time is created for date with a Low Exception

3. Click on the **Details** tab to display additional information for the Exception



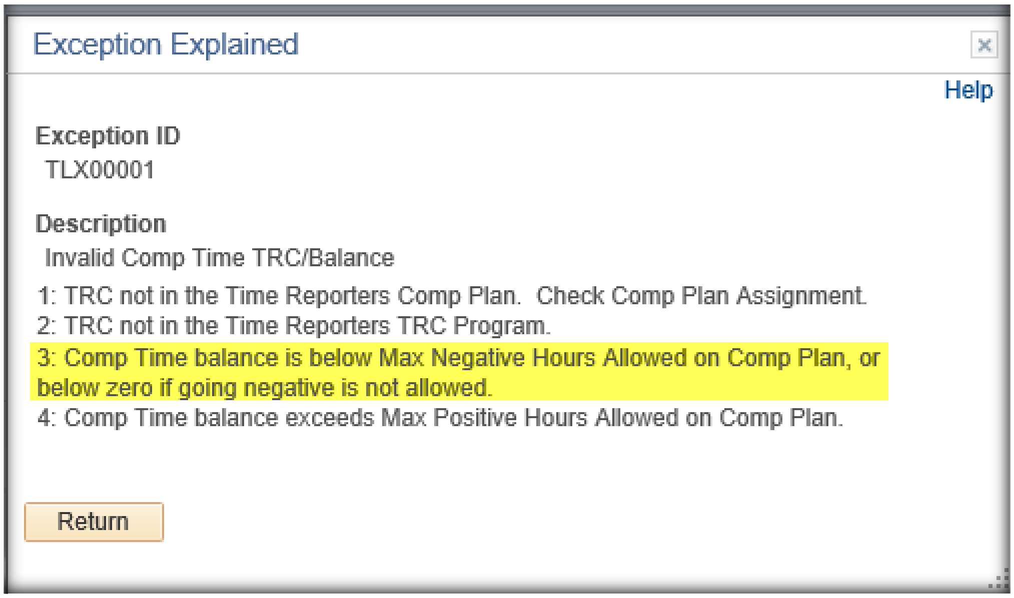
4. Look at the **Exception Data** column and note the Error number.

   In this example, the number in the Exception Data column is 3



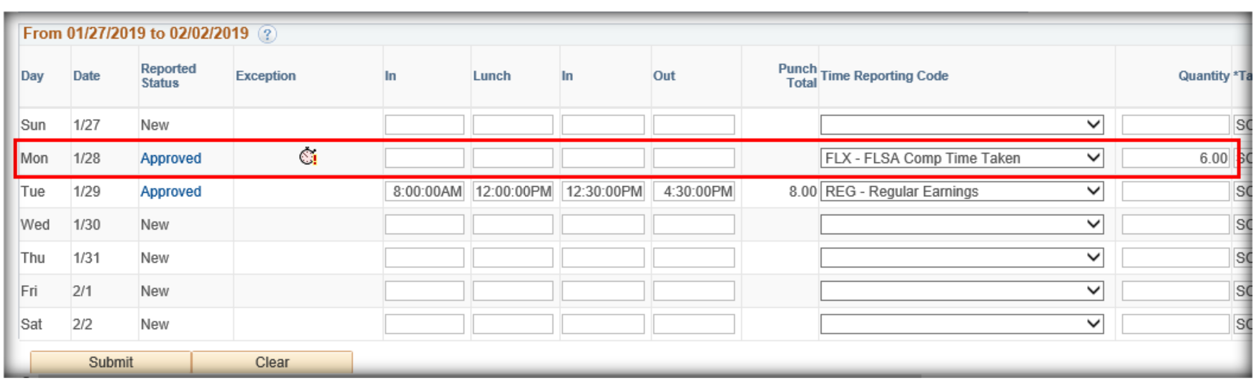
5. Scroll to the right and click the **Explanation** link

➢ Below is the Exception ID along with the detailed description



In this example, the Exception was created due to a Comp Time plan having a balance below zero.

Below is the timesheet with the Exception



Note: If there is more than one row for the date with an Exception, every row for the date will have the **Exception** icon displayed.

How to Clear Exceptions

Exceptions are cleared by correcting the timesheet and approving. When Time Administration processes, it will re-evaluate the entry. If all edits pass, the Exception will be cleared and payable time will be created.

Below is a chart of Exceptions in Time and Labor with a description and how to resolve

EXCEPTION ID/ SEVERITY LEVEL	DESCRIPTION	RESOLUTION STEPS
TLX00001 / High Severity	Invalid Comp Time TRC/Balance 1. TRC not in Time Reporters Comp Plan. Check Comp Plan Assignment	Contact your Agency HR. Provide the Empl ID, Date and Exception description. Agency HR will check to ensure the employee is enrolled in correct workgroup and enrollment into Comp Plans has the correct effective date. If it is correct, they should open a SAO Service Request ticket providing the same information and the results of their analysis.
	Invalid Comp Time TRC/Balance 2. TRC not in the Time Reporters TRC Program	Contact your Agency HR. Provide the Empl ID, Date and Exception description. Agency HR will check to ensure the employee is enrolled in correct workgroup and enrollment into Comp Plans has the correct effective date. If it is correct, they should open a SAO Service Request ticket providing the same information and the results of their analysis.
	Invalid Comp Time TRC/Balance 3. Comp Time balance is below Max Negative Hours Allowed on Comp Plan, or below zero if going negative is not allowed	Refer to detailed instructions How to Clear Exception TLX00001 – Negative Balance #3
	Invalid Comp Time TRC/Balance 4. Comp Time balance exceeds Max Positive Hours Allowed on Comp Plan	Contact your Agency HR. Provide the Empl ID, Date and Exception description. Agency HR will check to ensure the employee is enrolled in correct workgroup and enrollment into Comp Plans has the correct effective date. HR should then open a SAO Service Request ticket providing the same information and the results of their analysis.
TLX10076 / Low Severity	Rptd Time in the Change window	Time reported on timesheet is during the Daylight Savings Time change. This Exception is a Low Exception is for your information only. Follow the steps below to acknowledge and clear the Exception.

		Display the timesheet

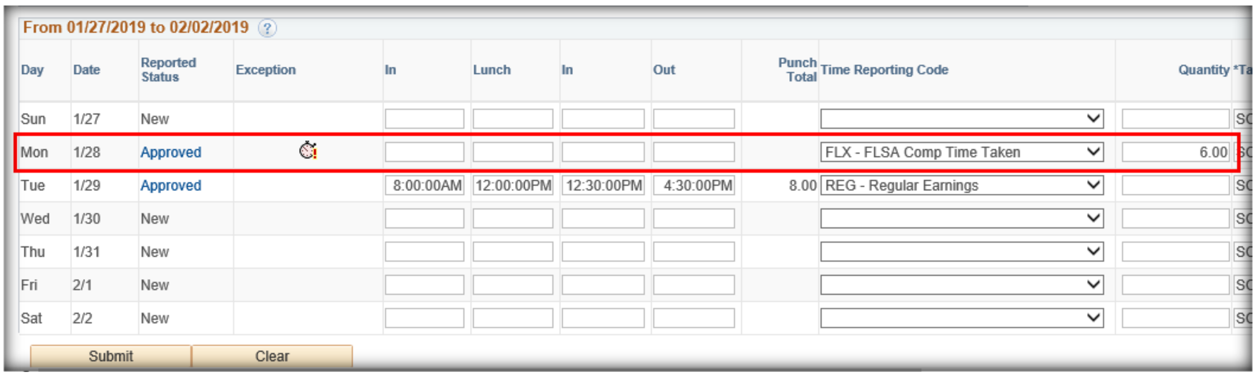
How to Clear Exception TLX00001 – Negative Balance #3

1. Check **Maintain Time Reporter Data** to ensure effective Date and other fields are correct

2. Check **Schedule Assignment** to ensure Effective Date and assignment are correct

3. Check **Comp Plan Enrollment** to ensure Effective Date and active plans are correct

4. Display the timesheet with the Exception



From 01/27/2019 to 02/02/2019

Day	Date	Reported Status	Exception	In	Lunch	In	Out	Punch Total	Time Reporting Code	Quantity	*Ta
Sun	1/27	New									SC
Mon	1/28	Approved							FLX - FLSA Comp Time Taken	6.00	SC
Tue	1/29	Approved		8:00:00AM	12:00:00PM	12:30:00PM	4:30:00PM	8.00	REG - Regular Earnings		SC
Wed	1/30	New									SC
Thu	1/31	New									SC
Fri	2/1	New									SC
Sat	2/2	New									SC

Submit Clear

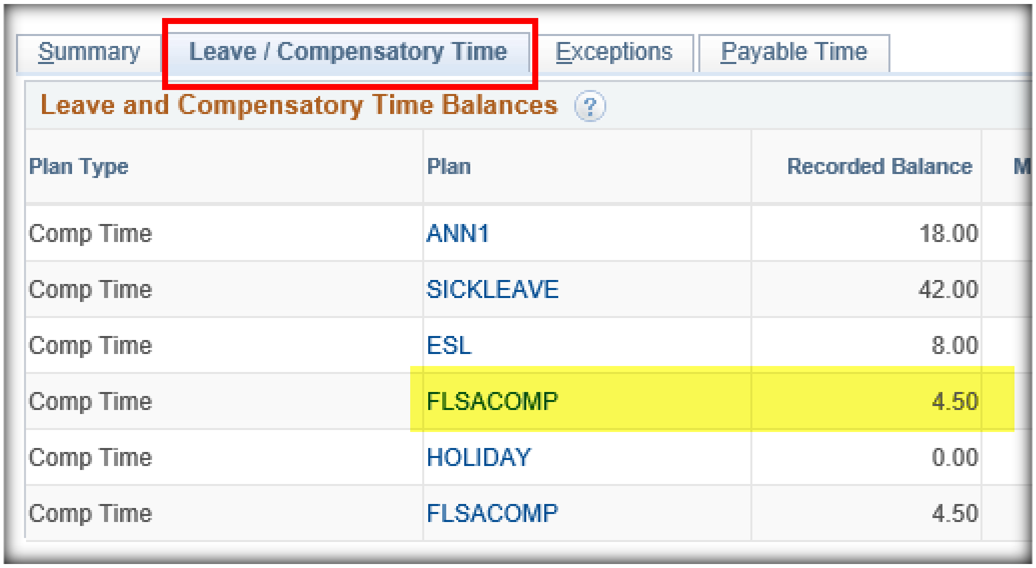
Note: Timesheets with more than one row for the date have the **Exception** icon on each row.

5. Click on the **Leave / Compensatory Time** tab

6. Review the Leave / Comp balance(s) related to the Take(s) on the timesheet. Remember the balances displayed are as of Day 1 of the timesheet displayed.

In this example, the employee's FLSA balance is 4.5 hours and the timesheet had 6 hours of FLX – FLSA Comp Time Taken reported. There were not any other FLX rows on the timesheet prior to the date with the exception.

Note: Always discuss changes with the employee and have the employee make the corrections to the timesheet if possible.



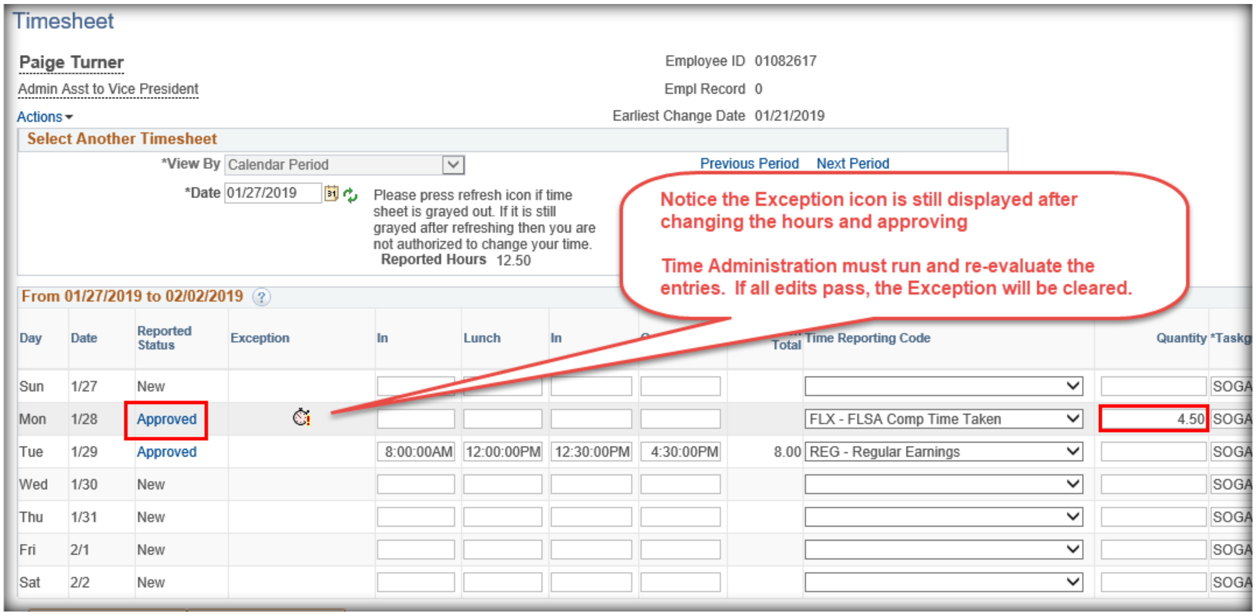
7. Click in the **Quantity** field and update the hours

8. Click the **Submit** button

9. Click in the **Select** checkbox

10. Click the **Approve** button

In the example below, the timesheet has been updated to 4.5 hours FLX and approved. The **Exception** icon will remain displayed on the timesheet row until Time Administration runs and re-evaluates. If all edits pass, the **Exception** icon will be removed and payable time created.



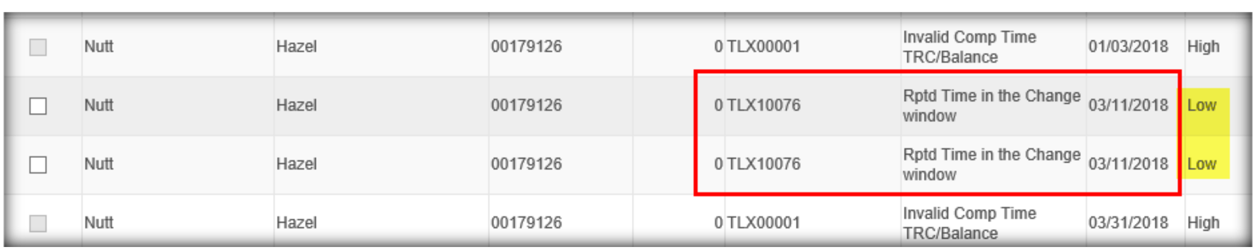
11. Once the Exception has been cleared, add a row to report the difference in the original Take hours and the updated Take hours to a different non-worked TRC.

In the example above, a row should be added to report 1.5 hours to a different Take TRC. (Originally 6 hours reported less 4.5 hours reported above = 1.5 hours)

Note: Remember to always discuss changes with the employee and have the employee correct the timesheet if possible.

How to Acknowledge a Low Exception

On the **Exception** screen, the Severity is displayed as High or Low. A Low Exception is for informational purposes only and must be acknowledged by the manager. Follow the steps to below to review the timesheet, acknowledge and clear the Exception.



1. Display the timesheet with the Exception(s)

In the example below, the employee reported two entries during the Daylight Savings timeframe.

Day	Date	Reported Status	In	Lunch	In	Out	Punch Total	Ti
Sat	3/17	Approved	12:01:00AM	2:30:00AM	2:45:00AM	7:16:00AM	7.00	
		Approved	6:44:00PM			11:59:00PM	5.25	
Sun	3/18	Approved	12:01:00AM	2:15:00AM	2:45:00AM	7:16:00AM	6.75	
		Approved	4:44:00PM	7:15:00PM	7:30:00PM	11:59:00PM	7.00	
Mon	3/19	Approved	12:01:00AM	2:45:00AM	3:00:00AM	7:16:00AM	7.00	

2. If the timesheet entries are correct, display the **Exception** screen again
3. Hold the cursor over the checkbox in the Allow column and click or
   - ➢ The checkbox will be checked
4. Click the **Select All** button
   - ➢ All checkboxes will be checked
5. Click the **Save** button

Exceptions ? Personalize | Find | View All | First 1-5 of

Overview | Details | Demographics

Allow	Last Name	First Name	Empl ID	Empl Record	Exception ID	Description	Date	Severity
☐	Nutt	Hazel	00179126	0	TLX00001	Invalid Comp Time TRC/Balance	06/15/2017	High
☐	Nutt	Hazel	00179126	0	TLX00001	Invalid Comp Time TRC/Balance	01/03/2018	High
☑	Nutt	Hazel	00179126	0	TLX10076	Rptd Time in the Change window	03/11/2018	Low
☑	Nutt	Hazel	00179126	0	TLX10076	Rptd Time in the Change window	03/11/2018	Low
☐	Nutt	Hazel	00179126	0	TLX00001	Invalid Comp Time TRC/Balance	03/31/2018	High

Allow Exceptions ?

Select All | Deselect All

Save

- ➢ The Allow checkboxes are no longer displayed

Allow	Last Name	First Name	Empl ID	Empl Record	Exception ID	Description	Date	Severity
☐	Nutt	Hazel	00179126	0	TLX00001	Invalid Comp Time TRC/Balance	03/31/2018	High
	Nutt	Hazel	00179126	0	TLX10076	Rptd Time in the Change window	03/11/2018	Low
	Nutt	Hazel	00179126	0	TLX10076	Rptd Time in the Change window	03/11/2018	Low

6. Display the timesheet with the Exception(s)

- The Exception has been cleared without Time Administration processing and the **Exception** icon is no longer displayed

Day	Date	Reported Status	Exception	In	Lunch	In	Out	Punch Total	Time Re
Sat	3/10	Approved		12:01:00AM	2:30:00AM	2:45:00AM	7:16:00AM	7.00	
		Approved		6:44:00PM			11:59:00PM	5.25	
Sun	3/11	Approved		12:01:00AM	2:15:00AM	2:45:00AM	7:16:00AM	6.75	
		Approved		4:44:00PM	7:15:00PM	7:30:00PM	11:59:00PM	7.00	

New Hires/Rehires/Transfers from Another Agency

When an employee is hired/rehired/transferred on a date other than Day 1 of the timesheet calendar period, it is considered “Mid Period” in Time and Labor.

If your direct report is experiencing issues reporting their time on their first calendar period, contact your HR group for assistance. They will need to refer to the Time and Labor Operating Procedures for TL Central Administrators, Miscellaneous, Mid Period Hires/Rehires Workaround for instructions.

Delegation of Authority

Managers have the ability to Delegate their Authority for Time and Labor transactions to another manager or employee (Proxy) for a specified period of time. A Proxy has the same access as the manager for viewing/editing/approving timesheets and viewing/approving payable time.

Before entering a Delegation of Authority, be sure you and your Proxy have read the following.

- Always enter both a **To Date** and **From Date** on the **Delegation Request**.

- When a manager delegates their authority in Time and Labor, all transactions entered by their direct reports on timesheets between the delegation timeframe will mark the Proxy to approve the entry. The manager will NOT be marked as an approver.

- Once the period of delegation has passed, the Proxy will regain their previous access in Time and Labor and no longer have access to view/edit/approve timesheets or payable for the manager's direct reports.

- It is critical for <u>all</u> transactions entered during the delegation timeframe be approved by the Proxy <u>prior</u> to the Delegation expiration. After the Delegation expires, the manager will see Approval in Progress in the **Reported Status** field and will not be able to approve the entries.

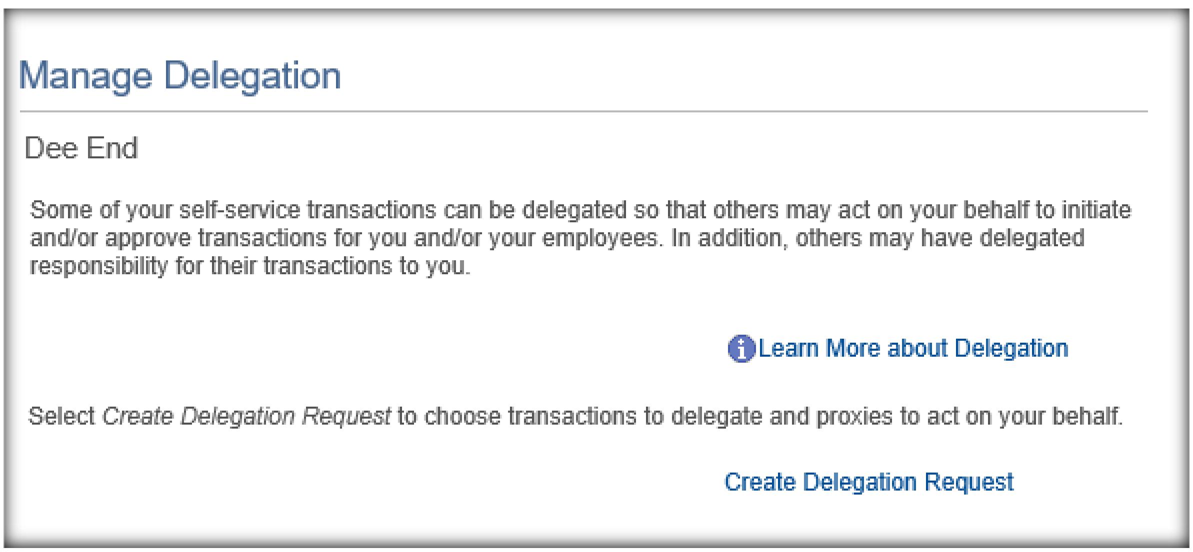
  <u>Note</u>: Contact HR for all Approval in Progress entries.

How to Create a Delegation Request

Use the navigation below to create a Delegation of Authority

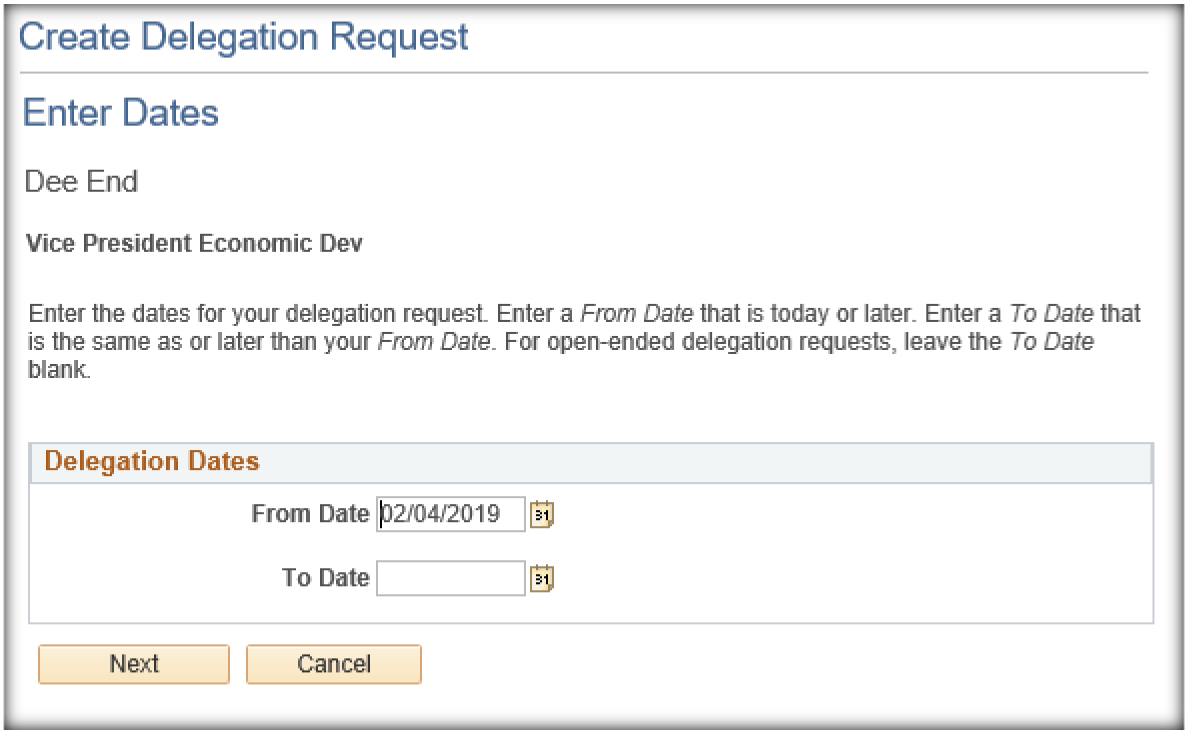
SELF SERVICE > MANAGE DELEGATION

- ➢ The **Manage Delegation** screen will be displayed.



1. Click the **Create Delegation Request** link

   - ➢ The **Create Delegation Request** screen will be displayed with the current Date in the **From Date** field.

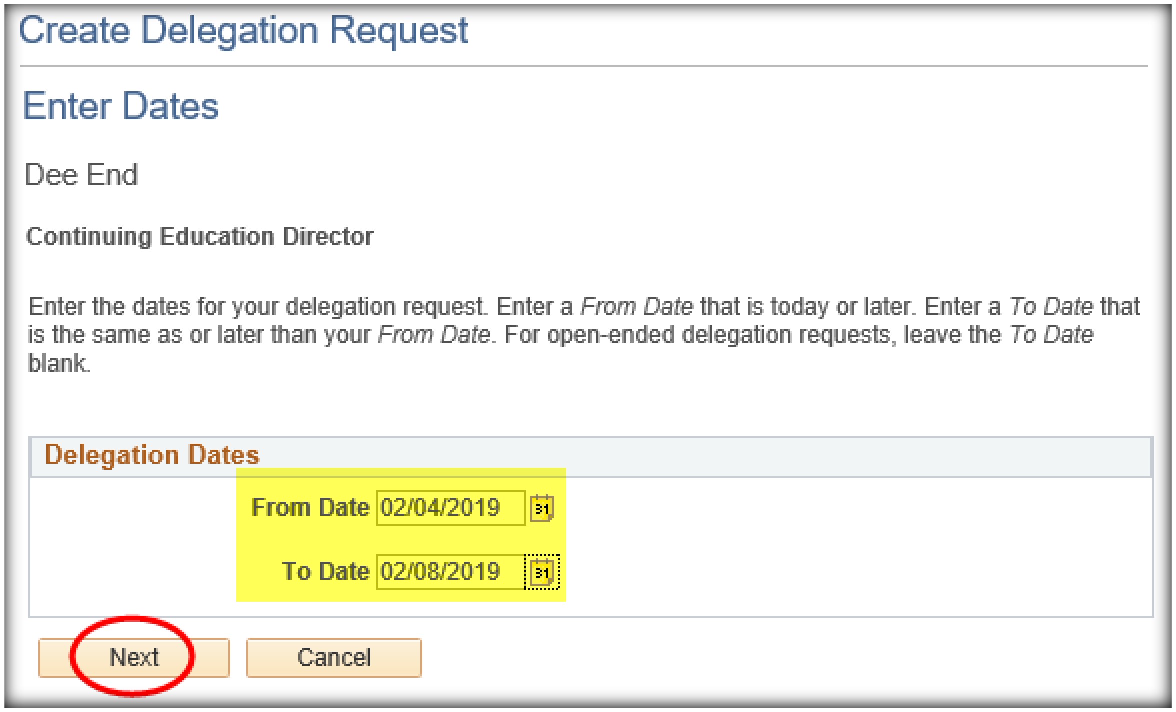


2. Enter the From Date in the **From Date** field

3. Enter the To Date in the **To Date** field

4. Click **Next** button

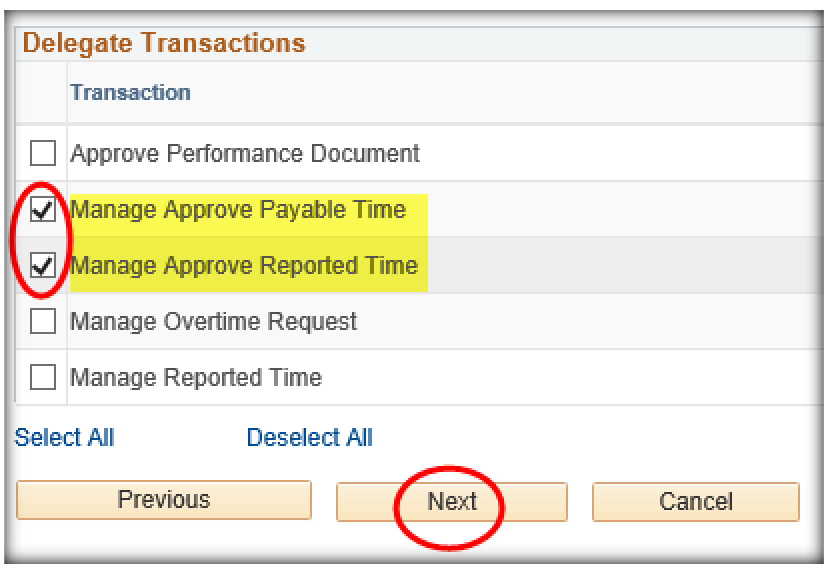
   Note: The **From Date** and **To Date** are the dates transactions are entered (i.e., Delegation of Authority is for 2/4/2019 through 2/8/2019. A direct report enters ALX on their timesheet for date 1/17/2019 on Wednesday, February 6th; the Proxy will be marked as the approver, not the manager. The same employee enters ALX on their timesheet for date 1/18/2019 on Monday, February 11th; the manager will be marked as the approver and the Proxy will not be marked as the approver and will no longer be able to access the emplyee's timesheets.).



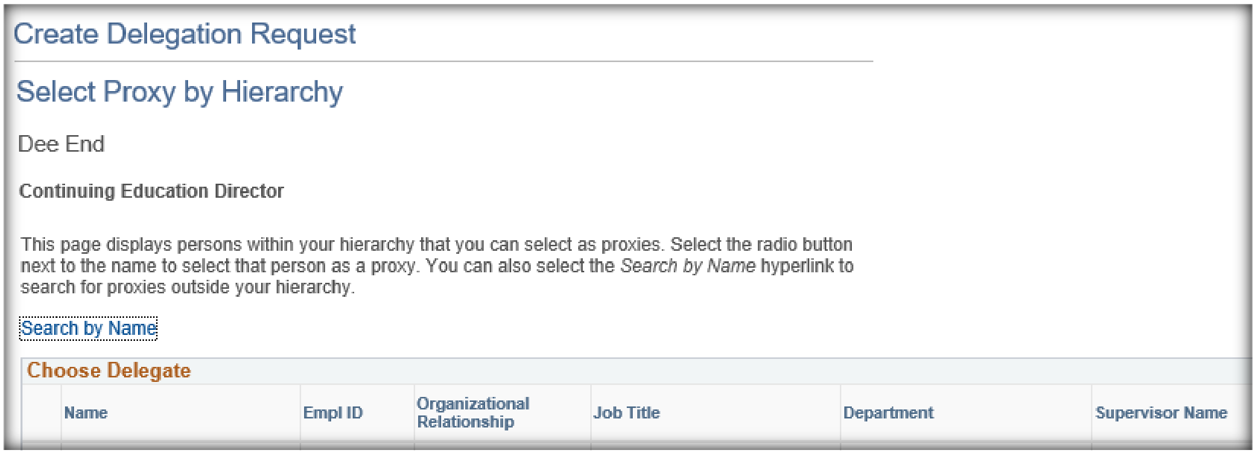
5. Check the **checkboxes** for the transactions to be delegated to your Proxy

   Note: To delegate for both Timesheets and Payable Time, select the Transactions listed in the screen below.

6. Click the **Next** button

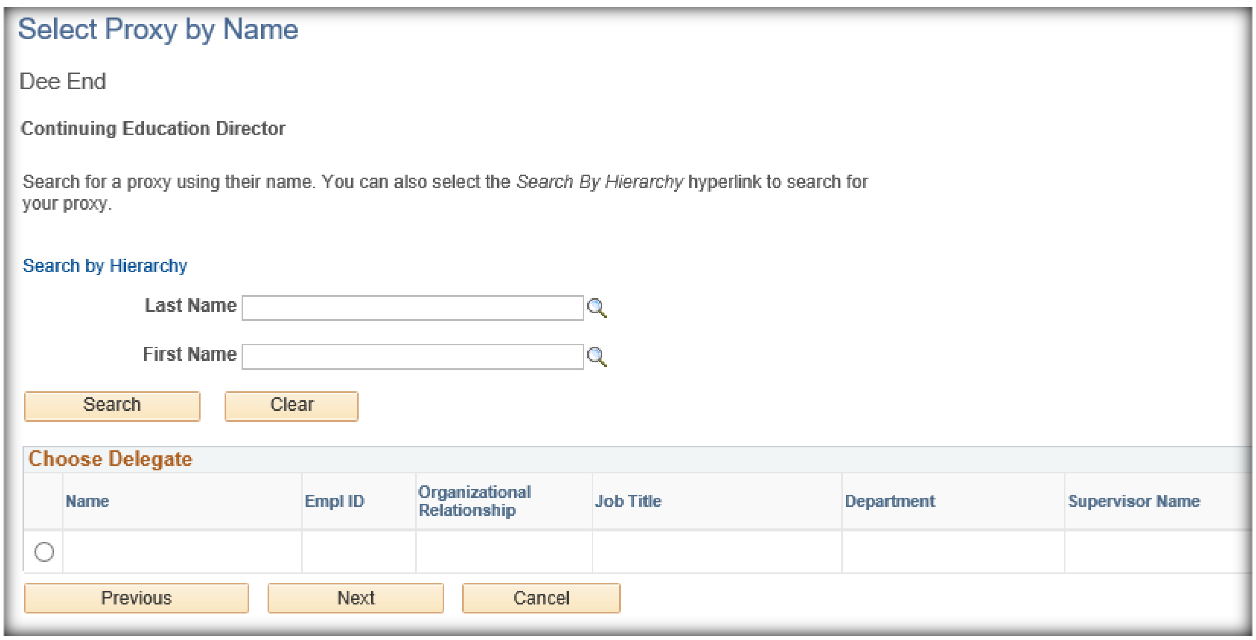


- The **Select Proxy by Hierarchy** screen will be displayed with employees available for selection.



7. To search for an employee, click the **Search by Name** link

   ➢ The **Search by Hierarchy** screen will be displayed

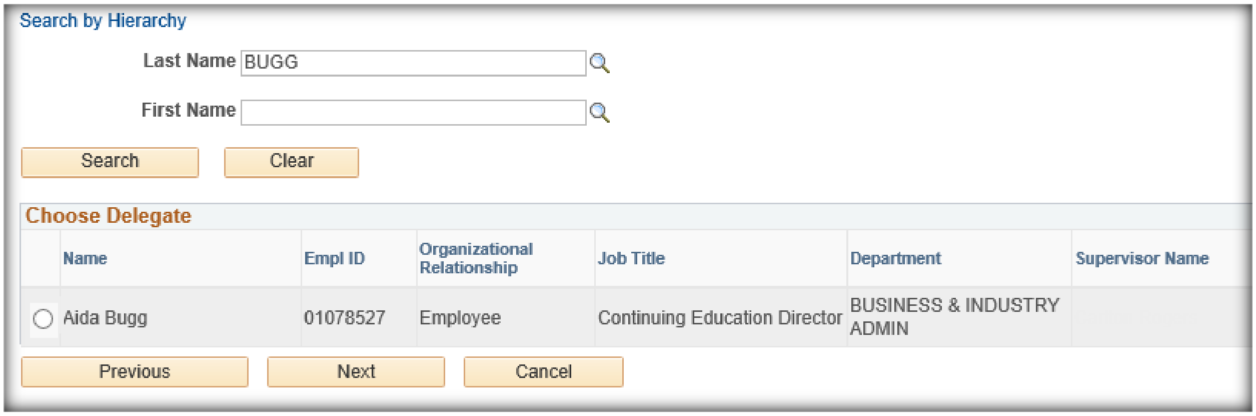


8. Enter the Proxy's Last Name in the **Last Name** field or use the **Magnifying Glass** icon to perform a Look Up and/or

9. Enter the Proxy's First Name in the **First Name** field or use the **Magnifying Glass** icon to perform a Look Up

10. Click the **Search** button

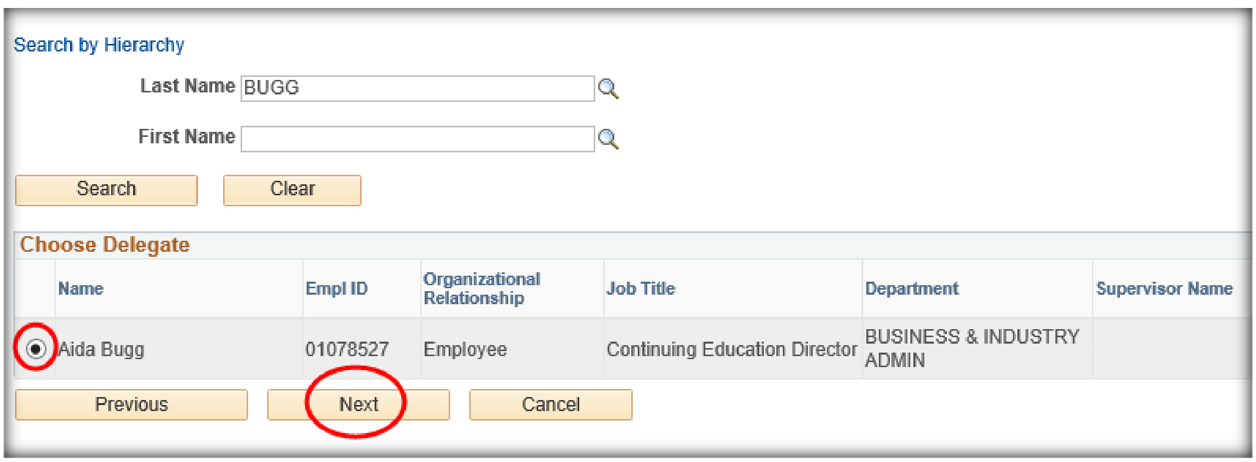
➢ Search results will be displayed



11. If the employee displayed is correct, click the **button** next to the Name of the employee

12. If the employee is not the correct employee, click the Previous button to go to the previous screen

13. Click the **Next** button



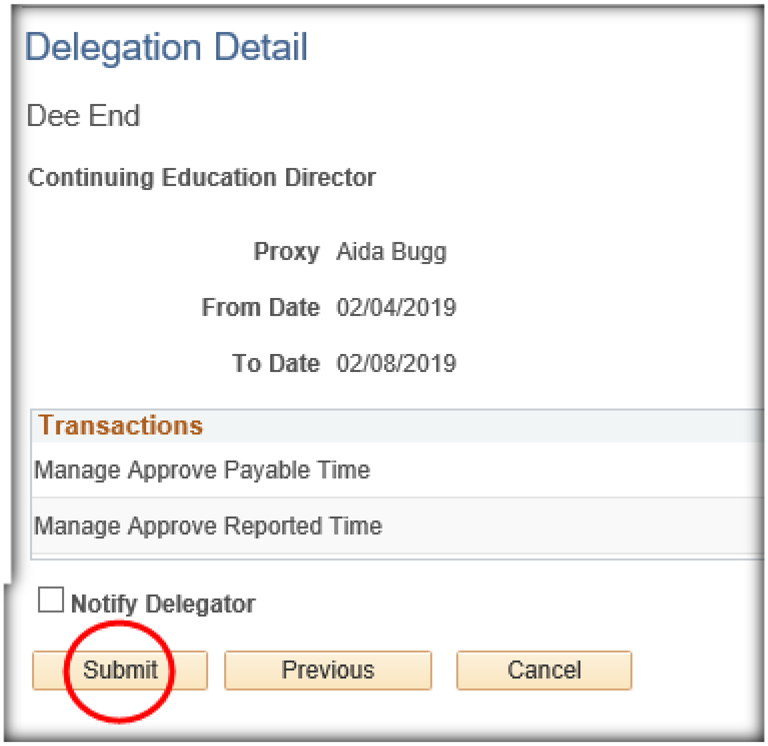
➢ The **Delegation Detail** screen will be displayed

14. If the **Delegation Detail** is correct, click the **Submit** button

15. To make changes, click the **Previous** button

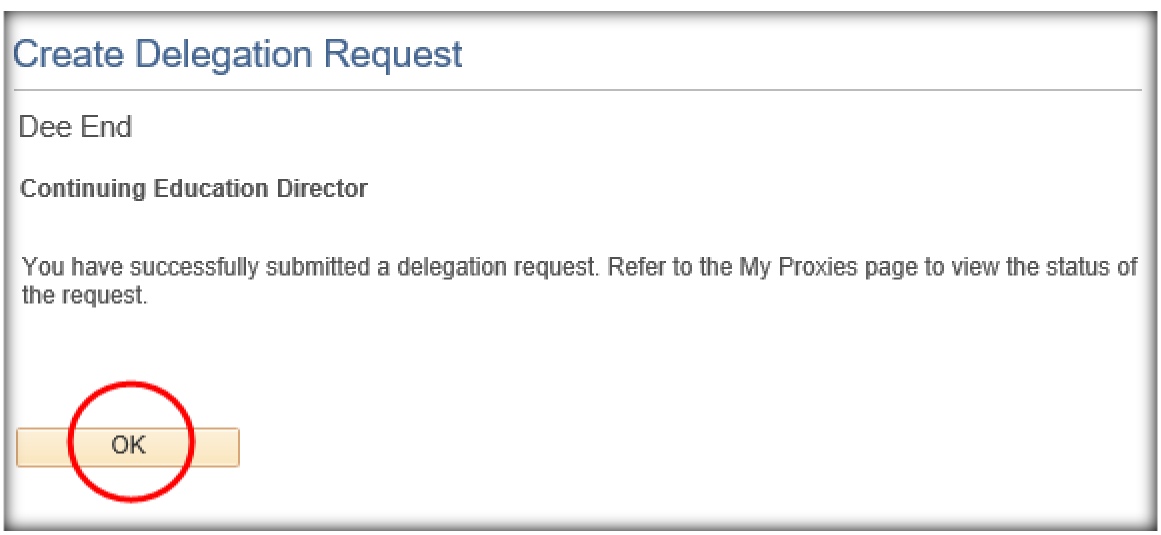
16. To cancel and delete the **Delegation Request**, click the **Cancel** button

Note: Email distribution is not turned on for Time and Labor. You will need to communicate with your Proxy advising they have a Delegation Request waiting for their acceptance.



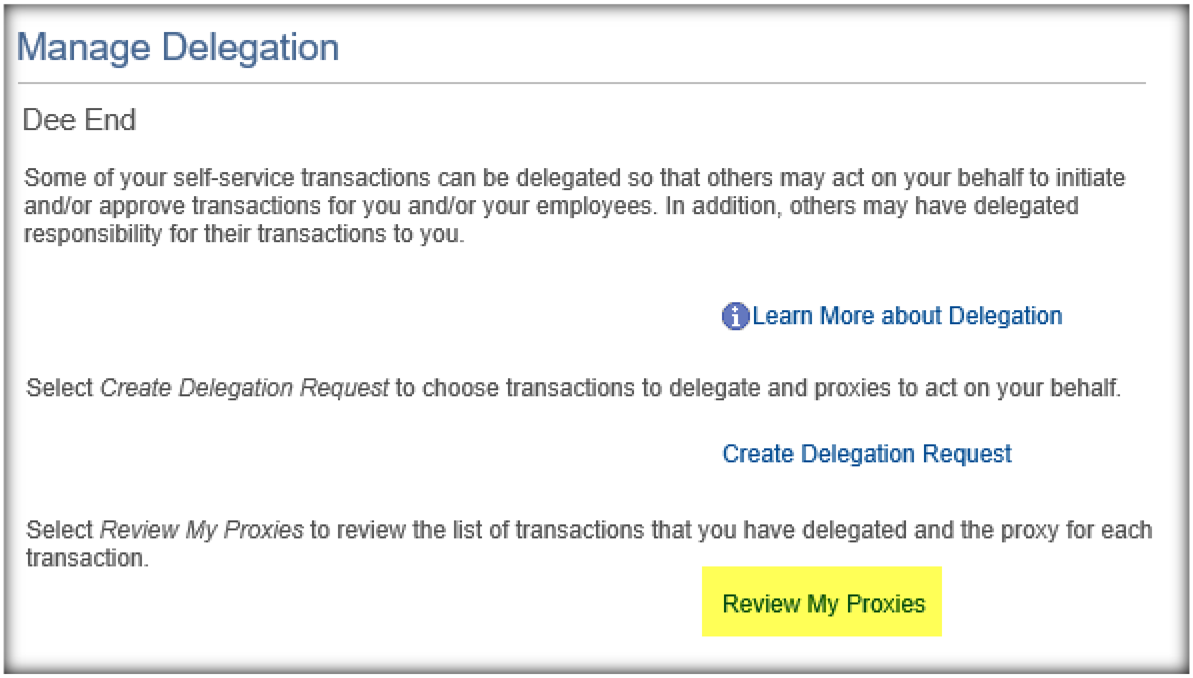
- ➢ A message will be displayed advising Delegation Request was successfully submitted.

17. Click **OK** button

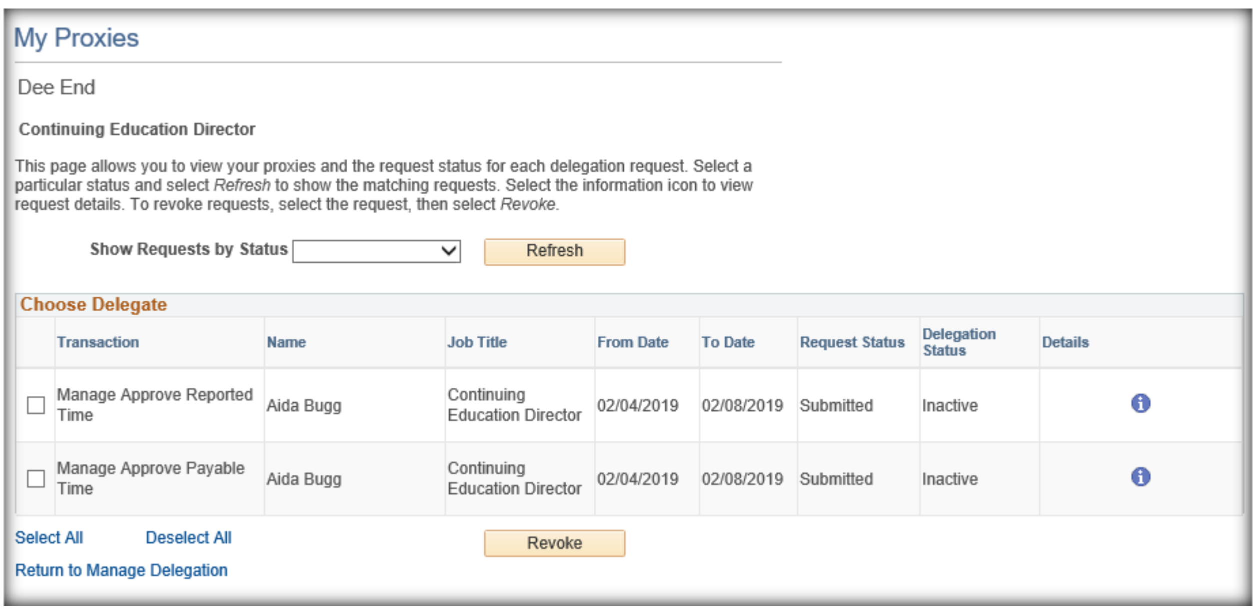


- ➢ The Manage Delegation screen will be displayed

18. Click on the **Review My Proxies** link to review proxy status



➢ The **My Proxies** screen will be displayed



My Proxies

Dee End

Continuing Education Director

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select *Refresh* to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select *Revoke*.

Show Requests by Status Refresh

Choose Delegate

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐	Manage Approve Reported Time	Aida Bugg	Continuing Education Director	02/04/2019	02/08/2019	Submitted	Inactive	
☐	Manage Approve Payable Time	Aida Bugg	Continuing Education Director	02/04/2019	02/08/2019	Submitted	Inactive	

Select All Deselect All Revoke

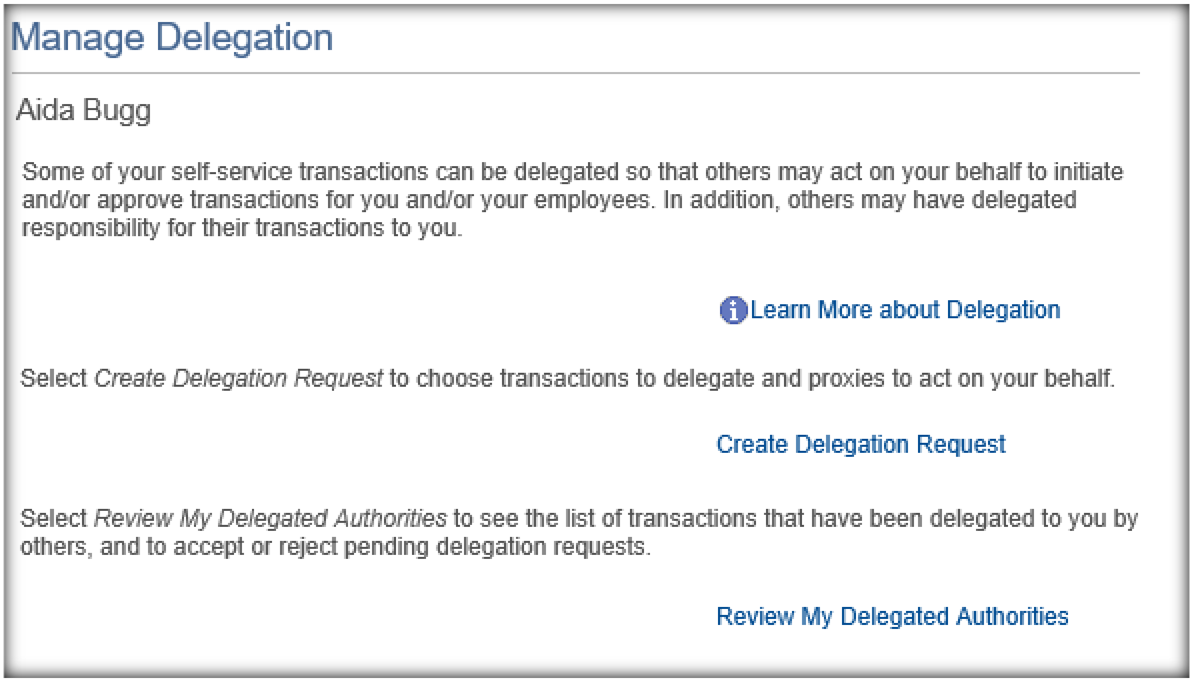
Return to Manage Delegation

How a Proxy Accepts a Delegation of Authority

The Proxy must accept the Delegation of Authority to complete the process. The Proxy should use the navigation below to accept the Delegation Request.

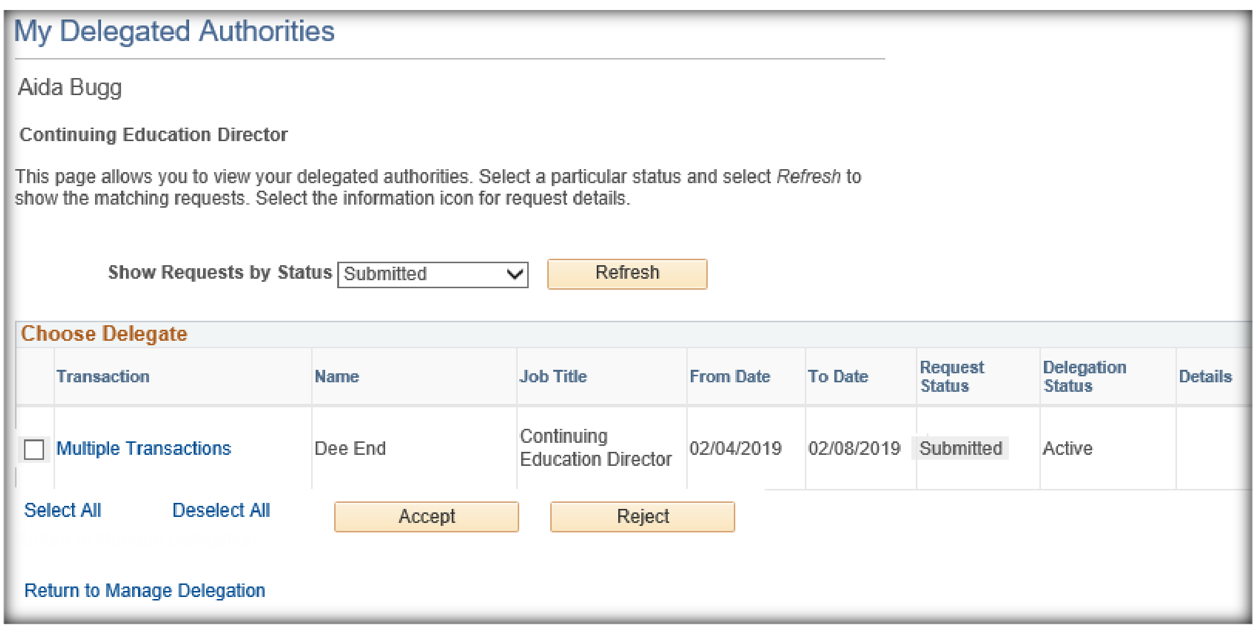
SELF SERVICE > MANAGE DELEGATION

- The **Manage Delegation** screen is displayed



1. Click the **Review My Delegated Authorities**

- The following screen is displayed

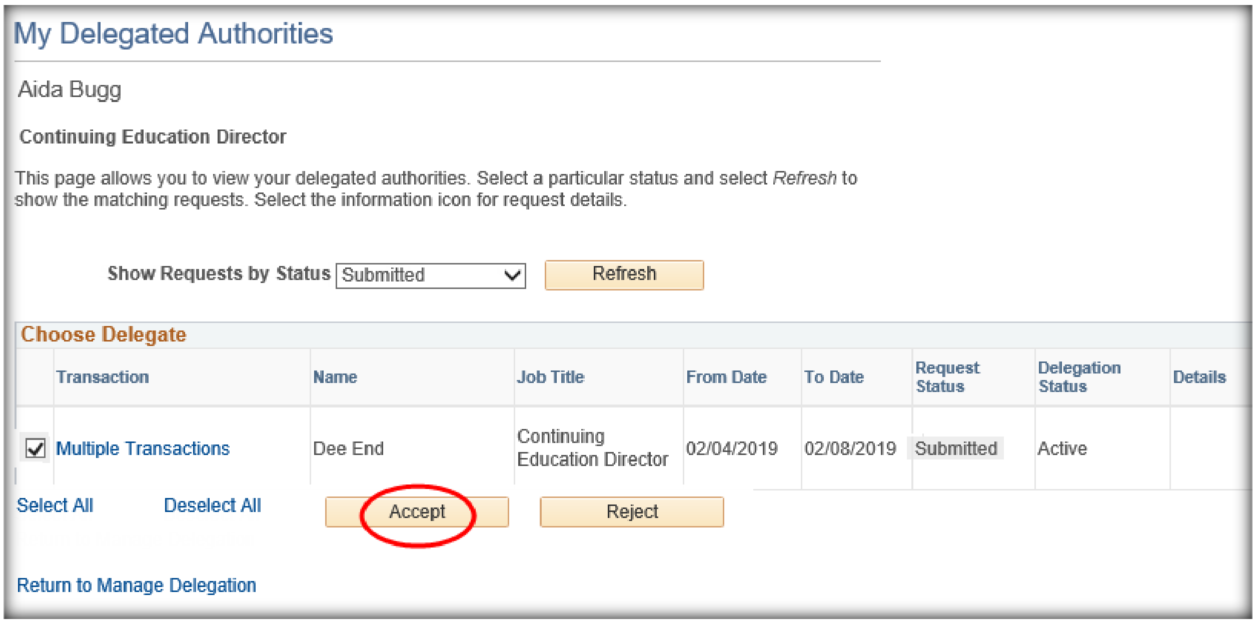


2. To accept the Delegation, click in the **checkbox**

3. Click the **Accept** button

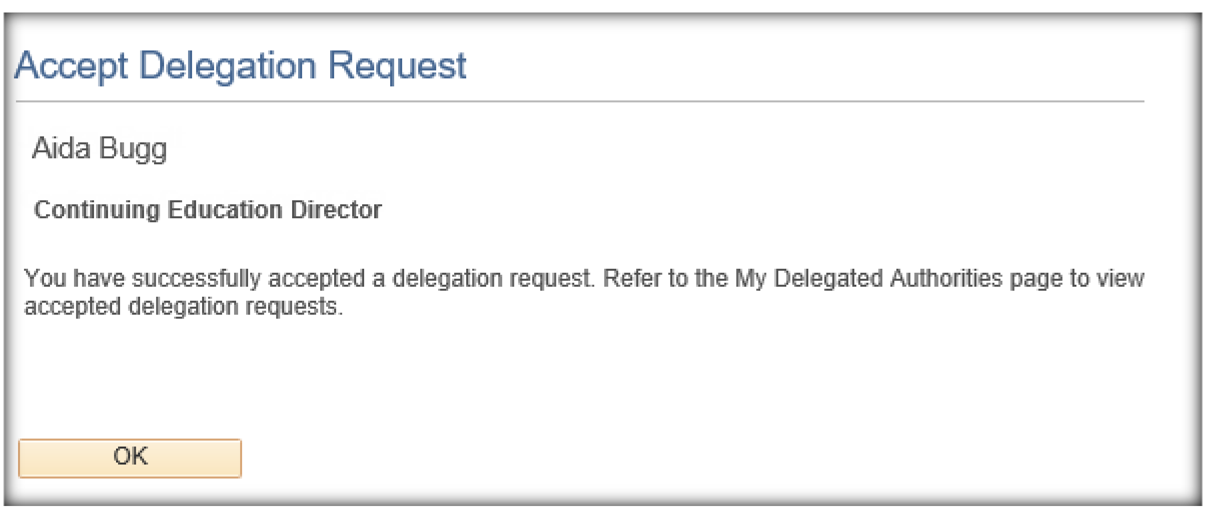
4. If you do not wish to accept the Delegation, click the **Reject** button

   Note: If the Delegation is rejected, the Proxy should communicate the Rejection with the Delegator



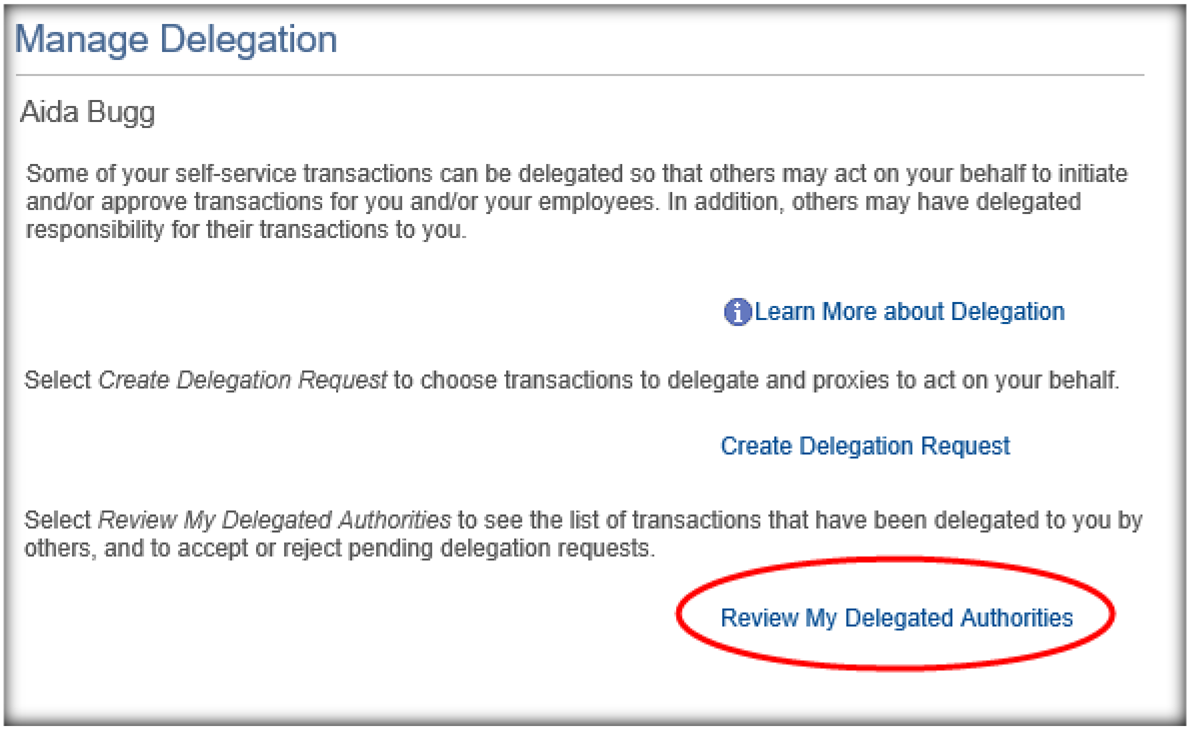
- ➢ A message will be displayed advising the Delegation Request was successfully accepted.

5. Click the **OK** button



- ➢ The **Manage Delegation** screen is displayed

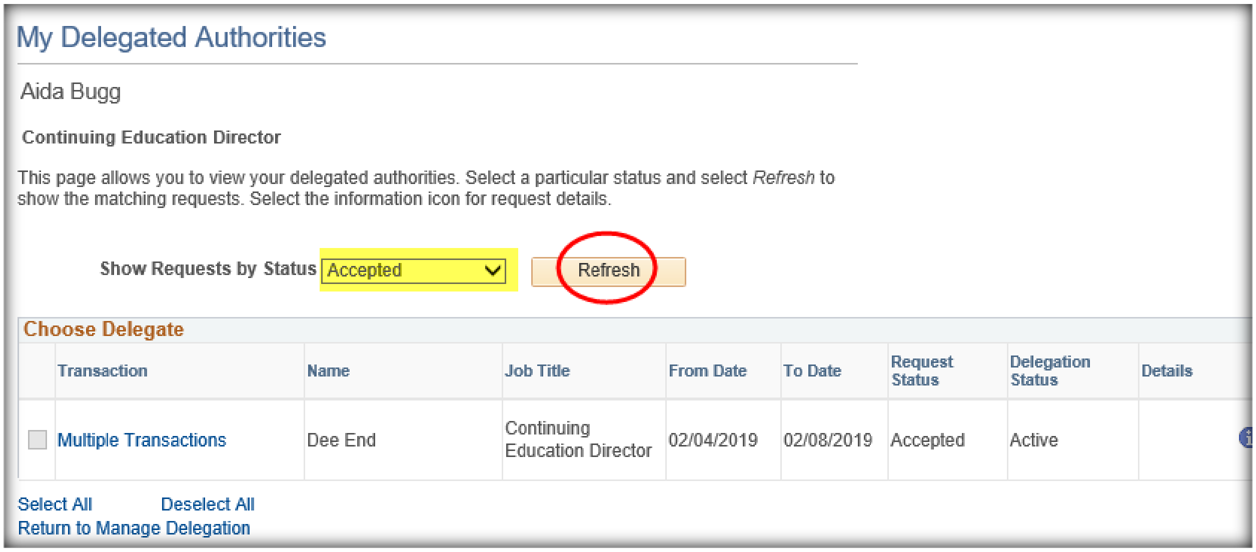
6. Click the **Review My Delegated Authorities** link to view your accepted delegations



- ➢ The **My Delegated Authorities** screen is displayed

7. Click **the Show Requests by Status** drop-down arrow
8. Select **Accepted** from the drop-down list
9. Click the **Refresh** button

- ➢ Your Delegated Authorities will be displayed

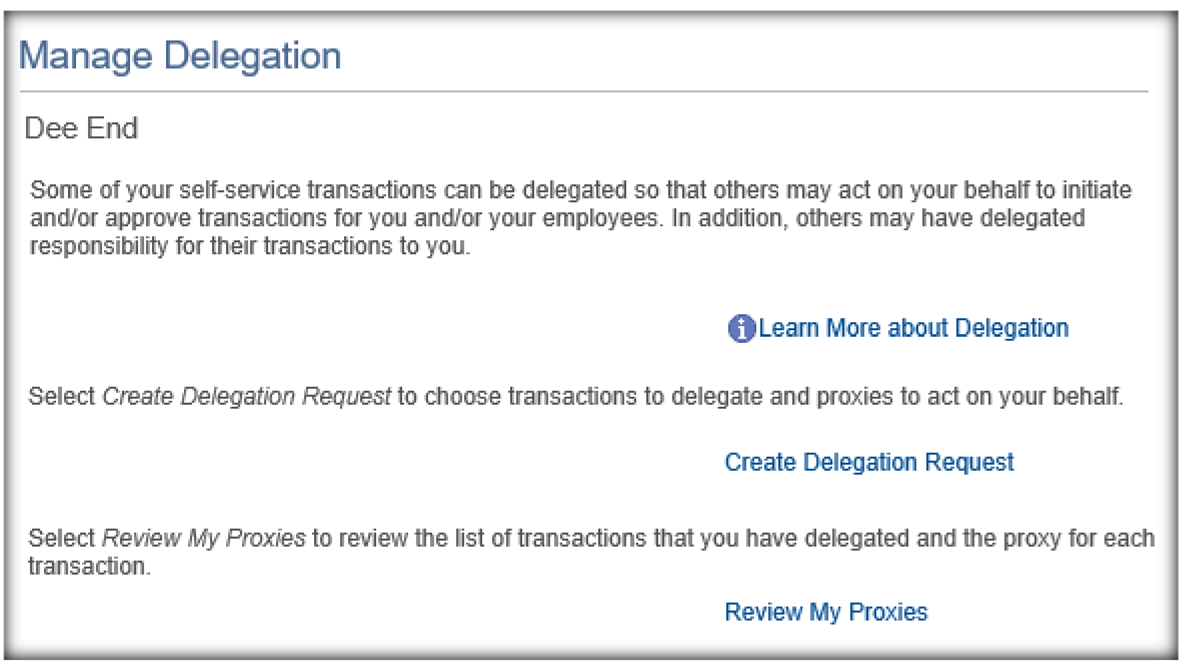


How to Revoke a Delegation

To revoke (cancel) an Active Delegation of Authority, use the following navigation

SELF SERVICE > MANAGE DELEGATION

- The **Manage Delegation** screen will be displayed

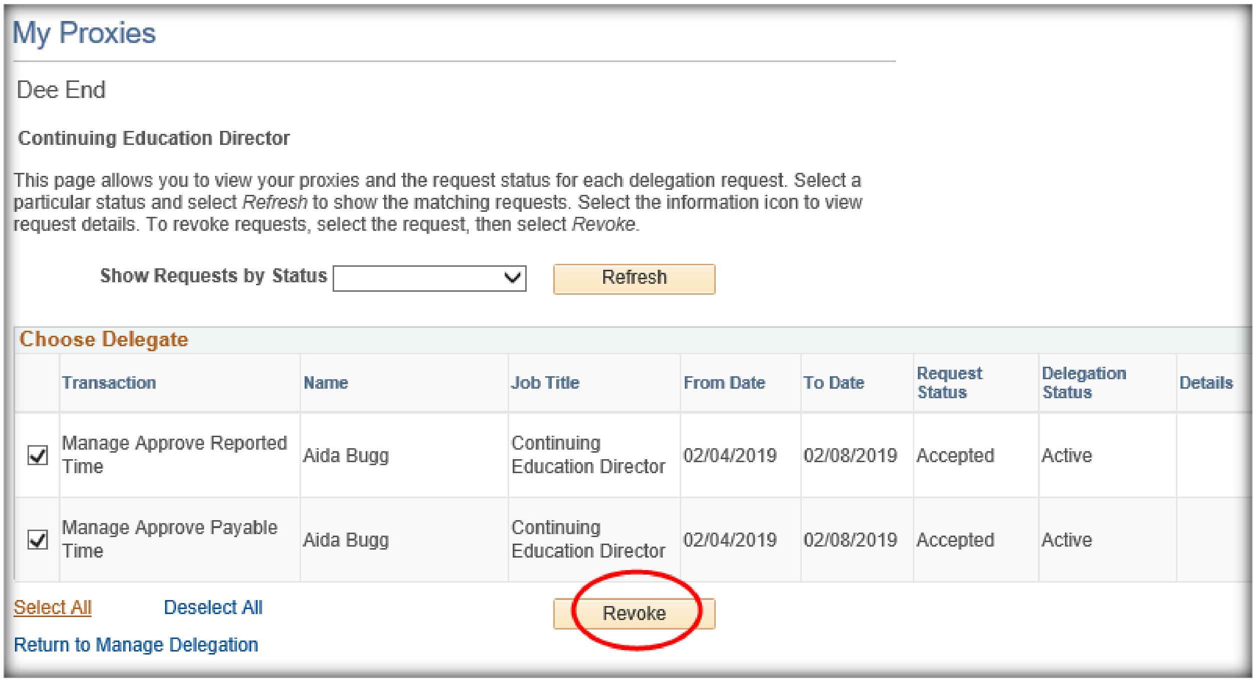


1. Click on the **Review My Proxies** link

2. Click the **checkboxes** or

3. Click the **Select All** button

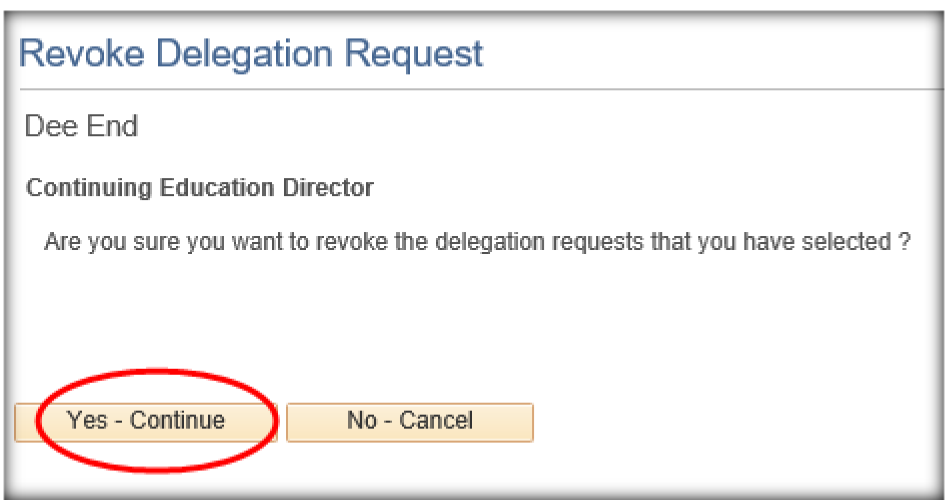
4. Click the **Reject** button



- ➢ The **Revoke Delegation Request** screen is displayed

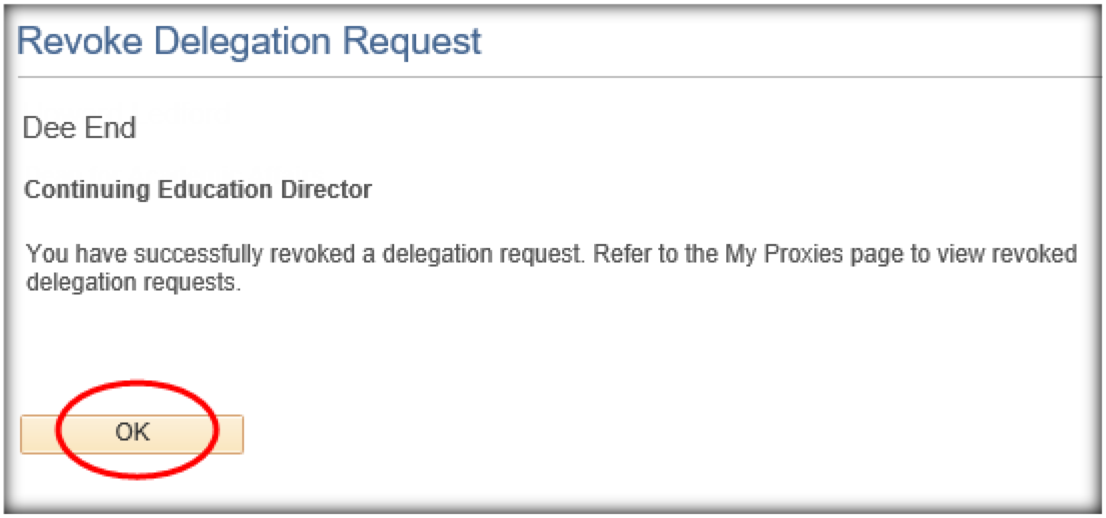
5. Click the **Yes – Continue** button

6. Or if you do not wish to Revoke the Delegation, click the **Cancel** button



- The **Revoke Delegation** screen is displayed

7. Click the OK button



- The **Manage Delegation** screen is displayed

Timekeeper Access

Timekeeper Access is a special Time and Labor access requiring an Online Security Request form to be submitted by your Agency Security Officer to the SAO Security Administrator.

A Timekeeper is set-up to have the same access as a manager and to be able to access employees based on criteria provided on the Online Security Request form.

All Timekeeper Requests must be provided to the Agency HR for consideration.