

# Timesheet Document Search

To view timesheets as a Time Supervisor or Payroll Processor you can log into Kualu Time and view them on your Approvals or Payroll Processor tab, or you can use Timesheet Document Search to find any employee's timesheet that you wish to view or modify.

The Timesheet Document Search screen provides adaptable search attributes that allow you to:

- Find and open historical and/or current timesheets for active employees
- Find and open timesheets for terminated employees, whether recent or past
- Identify timesheets enroute and not yet approved by supervisors or payroll processors
- Name, save and reuse a favorite search

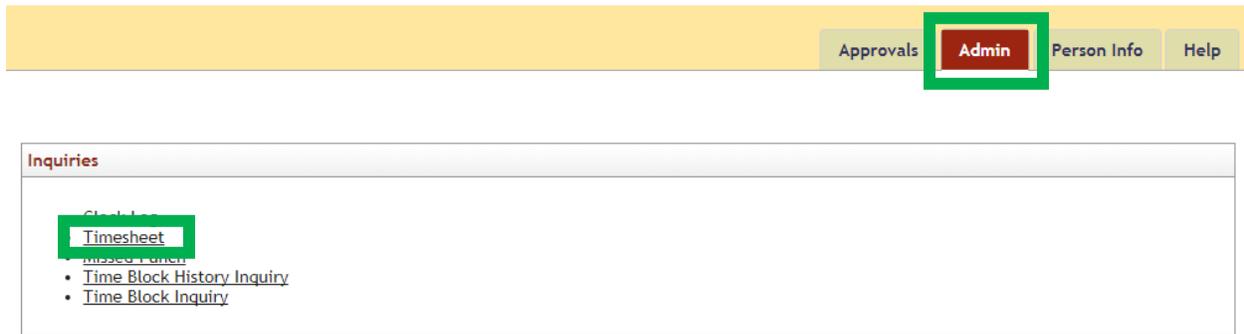
This document describes how Timesheet Document Search works and provides tips for using this type of inquiry to return useable results.

## Accessing the Timesheet Document Search

There are two ways to access the Document Search screen to find timesheets: via *One.IU* or via *Kualu Time*

### Access via Kualu Time

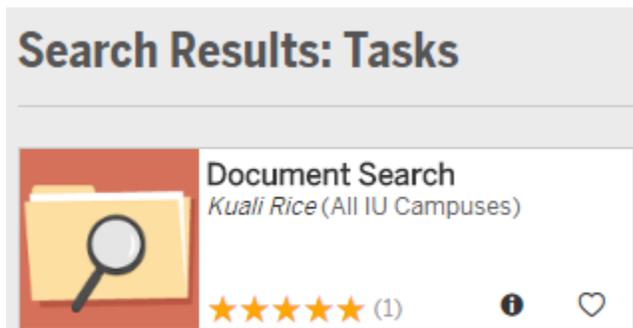
Login to Kualu Time and click on the Admin tab. Once on the Admin tab, select "Timesheet" in the **Inquiries** section of the page.



This will open the Timesheet Document Search in a new window or tab.

### Access via One.IU

To access the Timesheet Document Search via One.IU, select the Document Search task tile.



This opens the document search screen in basic mode.

To specify a timesheet search, enter "TimesheetDocument" in the Document Type field.

Next, click on the **(Advanced)** link located at top right of the page to open the advanced search mode. This creates additional search attributes such as: Department, Work Area, Salary Plan and Pay End Date, that you will use to find timesheets.

INDIANA UNIVERSITY  
Document Search

Doc Search Action List

Basic Search (Advanced)

Document Id

Document Type

Initiator

Created Date  to

Document Id	<input type="text"/>
Application Document Id	<input type="text"/>
Document Type	<input type="text" value="TimesheetDocument"/> <input type="button" value="Q"/>
Initiator	<input type="text"/> <input type="button" value="Q"/>
Title	<input type="text"/>
Status	<input type="text" value="Pending Statuses"/> <ul style="list-style-type: none"> <li>- INITIATED</li> <li>- SAVED</li> <li>- ENROUTE</li> </ul>
Approver	<input type="text"/> <input type="button" value="Q"/>
Viewer	<input type="text"/> <input type="button" value="Q"/>
Group Viewer	<input type="text" value="Use the lookup to search for this value"/> <input type="button" value="Q"/>
Route Node	<input type="text"/>
Route Node Logic	<input type="text"/>
Created Date	<input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/>
Approved Date	<input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/>
Modified Date	<input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/>
Finalized Date	<input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/>
Work Area	<input type="text"/>
Department	<input type="text"/>
Salary Plan	<input type="text"/>
Pay End Date	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>	

## Searching for Timesheets

Now that you have accessed and opened the Document Search screen in Advanced Search mode with “TimesheetDocument” loaded as the Document Type, follow these steps to search for timesheets:

1. Enter your search criteria to find the timesheets you want to view. Below are examples of the most common search criteria:
  - a. **Document Id** – Search for a specific timesheet using the timesheet’s document number.

- b. **Initiator** – enter the username of the employee whose timesheet you are looking for.
  - c. **Status** – returns a list of timesheets in a specific status, such as SAVED, ENROUTE, or CANCELLED. To retrieve a list of timesheets that still need approved, search for ENROUTE status.
  - d. **Approver** – enter the username of any Supervisor or Payroll Processor who approves timesheets for your department. Enter your username in conjunction with ENROUTE status to return a list of timesheets awaiting your approval.
  - e. **Route Node** – select the node where the document is currently at in its routing. In other words, who is next to approve the document, the employee, Supervisor, or Payroll Processor.
  - f. **Date fields** – There are four optional Date fields available. Enter the date range (format MM/DD/YYYY) on which you want to search. There are several options available:
    - i. *Created Date* – Date timesheets were created by Quali Time.
    - ii. *Approved Date* – Date timesheets were approved by either a Supervisor or Payroll Processor.
    - iii. *Modified Date* – Date timesheets were approved by the employee, a Supervisor, or Payroll Processor.
    - iv. *Finalized Date* – Date timesheets were approved by the last person on the route log, generally the Payroll Processor.
  - g. **Department** – enter your Department ID, such as BL-LIBR, or UA-FMOP.
  - h. **Work Area** – leave blank to return a list for all Work Areas or enter a specific Work Area number to limit your search.
  - i. **Salary Plan** – use the dropdown to select an hourly or biweekly Salary Plan, such as HR, HS, SS, SM, etc.
  - j. **Pay End Date** – leave blank for all pay periods, or enter a specific Pay Period end date, (format MM/DD/YYYY).
2. Click **Search**. Document search will return timesheets that match the search terms that were entered.
  3. Click on the Document Number of any timesheet in your results to open the sheet in a new window or tab.

**\*NOTE:** If you click the **Clear** button, it clears out all your search criteria entries, including Document Type. Before doing another search, you must re-enter the **Document Type** as “TimesheetDocument” or “timesheetdocument” (one word, exactly as typed) then **Tab** out of the field, to reload the ‘timesheet’ specific search fields (Department, Work Area, Salary Plan, and Pay End Date).

# DOCUMENT SEARCH Tips

## Searching by University ID

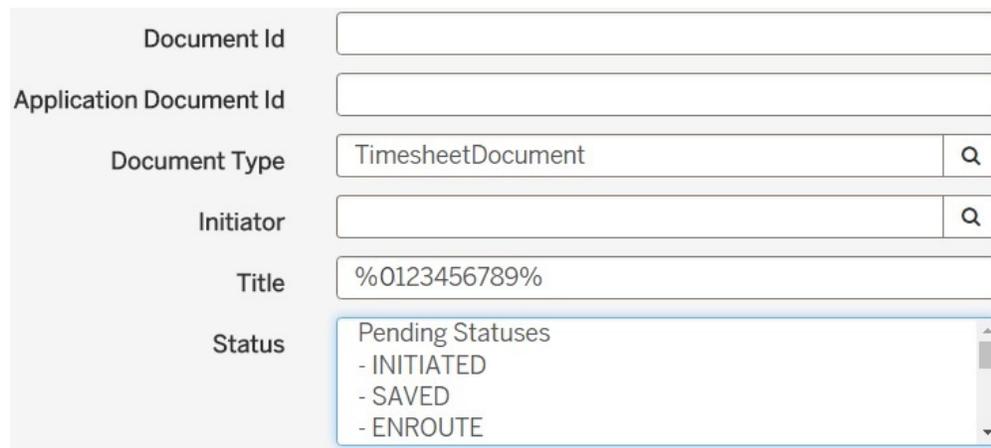
On most Document Search screens, you can search by a person's 10-digit University ID.

However, the Timesheet Document Search screen does not include the University Id field as a searchable attribute. Nevertheless, you can still search by University ID on this screen.

To do so, go to the "Title" field and surround the University ID on each side with the percent sign (%). For example, in the Title field, you would enter, **%0123456789%**

For timesheet searches, remember to set the Document Type as "timesheetdocument" or "TimesheetDocument" (one word, exactly as typed), then enter any other search criteria that you need and click **Search**.

For Quali Time, this will return a list of timesheets associated with the University ID number entered.



The screenshot shows a search form with the following fields and values:

- Document Id: [Empty text box]
- Application Document Id: [Empty text box]
- Document Type: TimesheetDocument [Search icon]
- Initiator: [Empty text box] [Search icon]
- Title: %0123456789%
- Status: Pending Statuses
  - INITIATED
  - SAVED
  - ENROUTE

## Identifying unapproved timesheets

When approving timesheets, you can use the Timesheet Document Search screen to identify timesheets not yet approved to avoid auto approvals.

This is useful for Supervisors and Payroll Processors who wish to identify timesheets still at the Supervisor level or the Payroll Processor level in danger of being auto approved.

**To identify timesheets not yet approved by Supervisors, enter the following criteria on the Timesheet Document Search screen:**

Document Type: TimesheetDocument (usually auto-populates, if not type it in and TAB out of field)

Status: ENROUTE

Route Node: Supervisor

Department: Input department (ie: BL-WKST)

(Optional) Work Area: Leave blank for all work areas or you can search by a specific work area

Pay End Date: Enter Pay Period end date for timesheets currently routing (MM/DD/YYYY)

You can sort results by Work Area by clicking the Work Area header in the search results. This helps to identify where to follow-up. Follow-up with a phone call or email to the Supervisors advising they need to approve by the end of Tuesday to avoid auto approval.

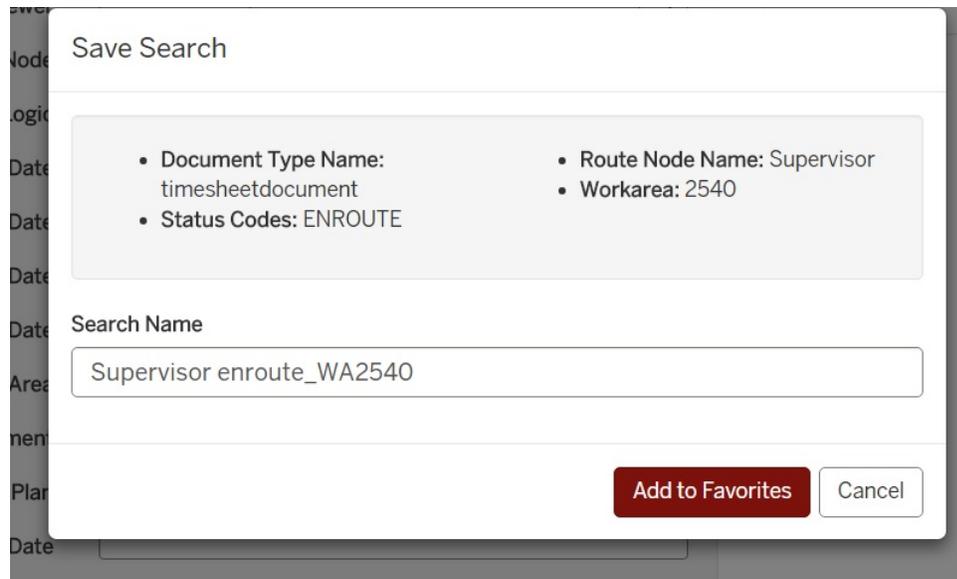
**\*NOTE:** Payroll Processors can change the Route Node to “Payroll Processor” and run the same search on Wednesday to look for any timesheets they need to approve before the Time Extract deadline.

### Saving your Search as a Favorite

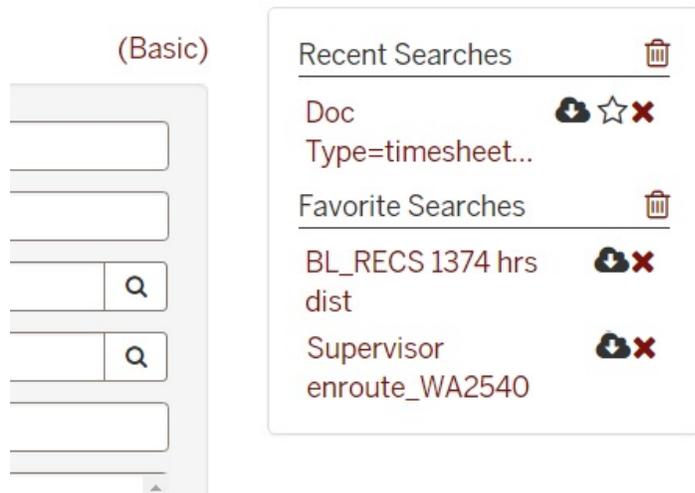
After you enter your search criteria and click **Search** to return results, you can name your search and save it, which allows you to perform it again in the future. After you receive your search results, go to either the top or bottom of your results list, and click on the Favorites button.



This opens the **Save Search** dialog box. Enter a descriptive name for your search in the “Search Name” field, then click the **Add to Favorites** button.



Saved searches appear in the Favorite Searches box located to the right of your Document Search screen. To perform that search in the future, just select its name from the list in the box.



**\*NOTE:** If you save a search that included specific dates (such as the Pay Period End Date), it will return your previous search results, based on that date. Since a “saved” search will reload the same search criteria, please remember to change the date(s) so a new search will return the most current results.

A list of Recent Searches you’ve performed appears above your saved Favorite Searches. You can click on the trashcan icon  to remove all of your Favorite Searches.