Using This Guide

This guide discusses all the key tasks that Time Approvers (Supervisors) and Payroll Processors can perform in the Kuali Time system. It provides an overview of the Approvals/Payroll Processor tab, and explains how to:

- On the ‘monitor and approval’ page, use:
  - ‘sort and filter’ or ‘search by’ fields to find a set of timesheets or one specific timesheet
  - roll-over icons that open ‘quick views’ of employee Notes and Warnings
  - clickable icons that open (and close) a ‘summary view’ of employee work hours
  - links that open an employee’s timesheet or shows their jobs, assignments and roles
  - buttons to approve timesheets
  - buttons and fields to scroll chronologically or to jump to timesheets in previous pay periods
  - displays that show current ‘work status’ and flags employees clocked > 12 hours

- Open timesheets to:
  - add, edit or delete time blocks
  - remove automatic meal deductions
  - add timesheet notes

- Approve single or multiple timesheets
- Approve missed punch documents
- View the Route Log for a timesheet
- Use Inquiry screens to look-up:
  - Time Blocks
  - Time Block History
  - Clock Logs
  - Missed Punch documents
- View the rules set up for your department (including your Work Areas)

Overview of the Approvals/Payroll Processor tab

When you log into the system as a Supervisor you have the Approvals tab; as a Payroll Processor you have the Payroll Processor tab. These tabs are identical in function, and if you have both roles, you will have both tabs.

Each of these tabs opens the ‘monitor and approval’ page (which acts as your Action List) and provides a “one-stop” portal for approvers to monitor, clean-up and approve timesheets. The Pay Period heading on the tab will show what pay period you are in.

You can ‘sort and filter’ your Action List of timesheets to view them by Department and then by Work Area or sort “enroute” timesheets by Approval Status to view which ones are ready for approval vs. not ready to approve.

You can ‘search by’ the employee’s Principal ID, Principal Name, or Last Name and by the timesheet Document ID number to find a specific timesheet (in that Pay Period).

You can monitor a Clock-Entry employee’s work status (in real-time), and If one of your employees fails to clock out after 12 hours, the cell with their Name is shaded in red to flag it for your attention. You can also open ‘quick views’ of any Notes and Warnings present on your employee’s timesheets, so you are aware of any issues or time entries that may need to be corrected.
When necessary, you can click on the Document Id number and open that employee’s timesheet to clock them in/out, to submit a Missed Punch document that records a missed clock action, to enter Time Block corrections, and to delete an automatic meal deduction when the employee did not take one.

You can use the Plus and Minus buttons in the ‘Name’ column of your Action List, to pop-open (and close), a “summary view” of the hours worked by that employee to monitor their daily hours, or to review their daily, weekly and total pay period hours (by Assignment) when you are ready to approve that timesheet.

The page provides two other search fields, Year and Current Pay Period. Once you select a specific Year and Pay Period from the dropdown list, the system jumps directly to that set of historical employee timesheets. In addition, there are Previous and Next arrow buttons located on each side of the Pay Period heading that allow you to scroll back and forth through each set of historical timesheets by Pay Period, in sequential order. These search tools allow you to find and open any historical timesheet and review the recorded Time Blocks, hours, (and approvals) for that employee.

Once you leave the current Pay Period, a Go to Current Period link will appear, and serves as a “shortcut” you can click to return to the same set of employee timesheets in the current pay period.

If you click on an employee’s Name in your Action list, it opens the Person Info tab and you can view the jobs, assignments and Kuali Time roles held by that employee.

If you are a Supervisor, you should check your Action List notification emails during each Pay Period to ‘Approve’ or to ‘Correct and Approve’ any Missed Punch documents routed to you. These documents inform you of any missed clock actions by the employees you supervise, and you can review each one and, if applicable, correct any submitted with an inaccurate clock in or clock out time before you approve it.

Finally, at the end of each Pay period, Supervisors and Payroll Processors each must approve timesheets. The Action List ‘monitor and approval’ page provides you the option to approve an individual timesheet or do bulk approvals. The hours on a Final timesheet are then processed and sent to the HRMS Payroll system.

**Important Note:** Employees can continue to modify their timesheets until the first approval is made.
Note: This image presents all the tools available on the Approvals/Payroll Processor tab and is intended only to demonstrate those tools. Please note you will only be able to open and view one set of timesheet Notes or Warnings at a time.

Let’s look’s at the tools available to you on the Approvals tab or Payroll Processor tab. You can:

A Select a specific Department from the dropdown list at the top of the page to view all the employee timesheets for that department.

B (After selecting a Department), select a specific Work Area from the dropdown list at the top of the page, to view the timesheets for that work area.

C Click the Approval Status button to show you a list of timesheets that are ready to approve (Approvable) vs. the ones that are not ready to approve (Unapprovable).

D Search for a specific timesheet in that pay period, by Principal ID, Principal Name, Last Name or by Document ID. In the ‘Search By’ field, select ‘Principal ID,’ ‘Principal Name,’ ‘Last Name,’ or ‘Document ID’ from the dropdown, then enter the specific Name or ID number of the employee or timesheet you want to find in the ‘Value’ field and click Search.

E Click the Clear button to clear out results from a sort or search on your action list of timesheets.
F. Click the Previous or Next arrow buttons to view the previous (or next) set of timesheets (for your employees) in sequential order, by pay period.

G. Search for historical employee timesheets by year and then pay period, by using the Year field jointly with the Pay Period field.

H. Click on the Go to Current Period link to jump from a previous timesheet back to the one for the current pay period.

J. Roll (and hold) your cursor over the ‘Warnings’ button to pop open a “quick view” window that shows the warnings present on that timesheet.

K. Spot employees clocked in > 12 hours, as they are flagged (highlighted) in red.

L. Click on an employee’s ‘Name’ to open the Person Info tab for that employee and view their jobs, Time assignments, and roles.

M. See the current ‘Work Status’ of clock-entry employees.

N. Select all of the ‘ready to approve’ timesheets on that page by clicking the “Select ALL” checkbox (at the top of the column).

O. Click the Approve button to approve timesheet(s). The Approve button at the bottom of the page allows bulk approval of all the timesheets you have selected. If you select only one timesheet to approve, you will use the Approve button for that specific timesheet, located on the right side of the page in the ‘Action’ column.

P. Select an individual timesheet as ‘ready to approve,’ by clicking the “Select” checkbox.

Q. Roll (and hold) your cursor over the ‘Notes’ button to pop open a “quick view” window that shows the notes entered on that timesheet.

R. Click on the ‘Document ID’ of the timesheet, to open that employee’s timesheet.

S. Click on the ‘Plus’ button by an employee’s name to open a “summary view” beneath that row so you can see the hours that employee recorded by Assignment. Click the ‘Minus’ button to close the summary.

T. Click the Refresh Status button to refresh the current status of the timesheets you are viewing.

**Monitoring, Reviewing and Correcting Timesheets**

During the Pay Period, and before timesheets are routed for approval, you can go to the Approvals or Payroll Processor tab to open your timesheet Action List in a ‘monitor, review and correction’ mode. This page provides a “one-stop” portal to monitor, correct and (after routing to) approve your employee’s timesheets.

Here you will see a list of timesheets that currently route to you for review and approval along with several ‘sort and search’ fields that allow you to sort timesheets by Department and Work Area, to find specific timesheets, or to filter enroute timesheets by Approval Status.

Timesheets are accessible to you throughout the pay period which allows you to monitor employee status in real-time, to catch employees who are clocked-in greater than 12 hours, and if warranted, to open and edit specific timesheets to enter corrections.

The Work Status of clock-entry employees (clocked in, clocked out) is shown, along with the status of each timesheet (saved, enroute, or final).
You can roll your cursor over icons that open up “quick views” of Notes and Warnings, and clickable icons are provided to open (and close) a brief summary view that shows all hours and dollar amounts recorded, by Assignment, on an employee’s timesheet.

When a timesheet or set of timesheets are ready to approve, you will use the Approve buttons on these tabs to do your approvals. Once a timesheet is fully approved (Final), the information is then processed and extracted to the HRMS Payroll system.

Sorting Timesheets by Department and Work Area

When you open the Approvals or Payroll Processor tab, it finds a list of all the departments in which you approve timesheets. If you approve timesheets for only one department, it is already defaulted in the Department field.

Use the ‘sort and filter’ fields (see illustration below) to sort timesheets by Department and then to filter the list down by Work Area so you see only those timesheets for the employees in that work area. Additionally, you can focus on specific paygroups by selecting a Pay Type filter.

Important Note! Filtering by Pay Type may return timesheets for employees who have a job in that paygroup in a different department. Your results will only return the timesheets for jobs in your department but may be of a different pay type than the Pay Type filter identifies. Example: Bob Hoosier has two jobs with IU, a BW1 with UA-FMOP and a HRR with BA-ATHL. The UA-FMOP payroll processor will return Bob’s UA-FMOP BW1 timesheet when filtering by HRR Pay Types.

The system will find the timesheets you specified. If there are no timesheets found for that Department or Work Area, you will see the message, “No values match this search.” on the page.

5. To clear out the search results and return to a list of all your timesheets, click the Clear button.

Searching for Specific Timesheets

You can use the ‘search by’ fields on the Approvals or Payroll Processor tab to search for a specific timesheet in that Pay Period by an employee’s Principal ID (University ID), Principal Name (Username), Last Name, or timesheet Document ID.
1. In the Search By field, select the parameter you wish to search by and in the Value field, enter the specific name or number you want to find, then click Search. You must enter at least 5 characters to start a search (unless the Principal Name or Last Name is less than that.)

2. The system searches to find this value (and you may briefly see a black circle spinning next to the Search button). Any matches found will display in a dropdown box under the Value field. In that dropdown box, click on the ID number or name to select it.

This finds the timesheet for the value you selected. If the search fails to find a matching value, you will see the message, “No values matching this search.” on the page.

3. To clear out the search results and return to a list of all your timesheets, click the Clear button.

### Sorting Timesheets by Approval Status

Once timesheets have routed for approval in that Pay Period, you can use the Approval Status field on the Approvals or Payroll Processor tab to sort the list of timesheets in your Action List. You can sort by documents that are ready to approve, by those that have a problem and can’t be approved, or reset the page to view all.

1. In the Approval Status field, select the parameter you wish to sort by, ‘Approvable,’ or ‘Unapprovable.’

2. To clear out the search results and return to a list of all your timesheets, click the Clear button.

### Viewing Previous and Next Timesheets

On the Approvals or Payroll Processor tab, you can click on the Previous or Next buttons (located on each side of the Pay Period dates) to view the same set of employee timesheets, by pay period.

All historical timesheets have been converted to the Kuali Time system, so you can use these buttons to scroll back and forth and view previously approved timesheets, in chronological order, for your employees.

You can click on the Go to Current Period link as a “shortcut” to return to the current pay period.

### Viewing Timesheets by Year and Pay Period

On the Approvals or Payroll Processor tab, you can use the Year and Current Pay Period fields jointly, and select a year and then a pay period in that year, to jump directly to that set of employee timesheets.
You can click on the Go to Current Period link as a “shortcut” to return to the current pay period.

Returning to the Current Pay Period

If you leave the current pay period (timesheet) Action List to view any previous, future or historical timesheets, you can click on the Go to Current Period link as a “shortcut” to return to the current pay period.

Viewing Timesheet Warnings and Notes

You can view the Warnings and Notes entered on a timesheet without having to open it. The Action List of timesheets (on the Approvals or Payroll Processor tab) provides special ‘roll-over’ buttons that appear (next to or under the Document ID number) whenever that timesheet contains any Warnings or Notes.

When you roll (and hold) your cursor over either one of these special buttons, it will pop-up a ‘quick view’ window of any Warnings or Notes on that employee’s timesheet.

Viewing Notes:

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. To open the Notes “quick view” window for a timesheet, roll (and hold) your cursor over the Notes button.
3. If a Note contains several lines of text, move your cursor onto the ‘quick view’ window, and use the scroll bars located on the right to scroll up and down and read the entire Note.

Viewing Warnings:

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. To open the Warnings “quick view” window for a timesheet, roll (and hold) your cursor over the Warnings button.
3. If a Warning contains several lines of text, move your cursor onto the ‘quick view’ window, and use the scroll bars located on the right to scroll up and down so you can read the entire Warning.

Viewing Employee Work Status

The Name column on the timesheet ‘monitor and approval’ page shows the name of each employee, their University Id, and if they are a Clock-Entry employee, it shows their current Work Status. The current Work Status for a Clock-Entry employee appears just under their Name and Principal ID.

During the Pay Period you can view the current work status of Clock-Entry employees. This allows you to monitor your employees in real-time during the Pay Period, and spot any employees who failed to clock out.

Spotting employees clocked in > 12 hours

In this example, you can see that the first employee is clocked out, while the second one is clocked in.

The third employee’s ‘Name’ cell is flagged (highlighted in red), which indicates it’s been more than 12 hours since the employee clocked-in.

This allows you to spot an employee who missed a punch out, so you can contact them to submit a Missed Punch document to record their missed clock out.

You also have the option to submit a Missed Punch document for this employee to record their missed punch on the timesheet.

Refreshing Employee/Timesheet Status

At the bottom of the ‘monitor and approval’ page there is a Refresh Status button. When you click that button, it updates the current work status of the employees and their timesheets.

Opening (and Closing) the ‘Summary View’ of Employee Hours

On the Approvals or Payroll Processor tab, you can open (and close) a ‘summary view’ of the hours that an employee recorded on their timesheet.

This “summary view” is the same as the hours Summary located on the employee’s Time Detail tab. Both will show you the total ‘Worked Hours’ for each day along with a breakdown of the hours worked by Assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a Weekly and Period Total.
1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.

2. To open the “summary view” for an employee, click the ‘Plus’ button (by employee’s name).

   ![Summary View Example]

   This opens, just beneath that row, the “summary view” of worked hours by the employee.

3. To close the “summary view,” click the ‘Minus’ button (by employee’s name).

   Note: You can open the ‘summary view’ of hours worked for more than one employee at a time.

Opening a Timesheet

To view an employee’s timesheet or to enter corrections, you can open it from your action list of timesheets on the ‘monitor and approval’ page.

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. Use the ‘sort and filter’ or ‘search by’ fields to find the timesheet you want to open.
3. Click on the underlined Document ID number. That opens the employee’s Pay Period calendar on the Time Detail tab. (The calendar header is clearly marked to indicate you are working on an employee’s timesheet.)

   Here you can review or edit any Time Blocks recorded by this employee (on the Assignments you have access to), or click on other tabs to view the employee’s Leave Accruals, Person Info, or last Clock action.

   For clock-entry employees, you could go to the Clock tab, and clock an employee in/out, or submit a Missed Punch document to record a missed clock action. You will only see the Assignments you have access to view.

4. To close the (timesheet) calendar for this employee, click the Return button at the top of the page. This returns you to the ‘monitor and approval’ page on the Approvals tab or Payroll Processor tab.

Adding a Time Block to a Timesheet
To add work hours, leave hours, or fixed-rate dollar amounts to an employee’s timesheet, you must add a Time Block:

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. Use the ‘sort and filter’ or ‘search by’ fields to find the timesheet you want to open.
3. Click on the underlined Document ID number. That opens the employee’s timesheet calendar on the Time Detail tab.
4. On the Pay Period calendar, select the day or date range on which to add the Time Blocks:
   - To add a Time Block for one single day, click on the day you want to add.
   - To add the same Time Block across multiple days, such as Monday through Friday, click and hold down the (left) mouse button on the first day of your date range (Monday), and simultaneously drag the cursor over to the last day in the range (Friday), then release it.

When you select multiple days, it highlights those days (in blue), and the ‘Add Time Blocks’ entry box opens showing the date range you selected. A single day entry, just opens the ‘Add Time Blocks’ screen with the date range showing as the same day.

   - If the employee works an overnight shift, you can use the click and drag method to select both days in the shift. But, you must UNCHECK the ‘Apply time to each day’ checkbox.
   - Once the ‘Add Time Blocks’ entry box is open, you also have the option to type in the date range or click on the calendar button beside each date field, to pop-up a monthly calendar and select the range of dates. For example, you could type in or use the calendar button to enter a date range such as: 07/17/2013 to 07/19/2013.

Note: You can click and drag on the ‘sizing handle’ , located in the lower right-hand corner, to resize the ‘Add Time Blocks’ entry box.

5. Verify the Date Range is correct.
6. Select the Assignment for the time block you are adding. (If the employee has only one Assignment, it will already be selected.) You will only be able to select the Assignments that you have access to. A time Assignment is a unique combination of Job, Job Number, Work Area (and Task), and is used to record the hours that an employee works.
7. The Earn Code field will default to the regular earn code for the employee’s job (RGH, RGW, RGP, RGN, or RBP).
   • If you need to change it, select the appropriate Earn Code from the dropdown list (such as ABS, SCK, VAC, PTO, CPT, etc.)

8. You can enter Time Blocks for regular hours worked, hours of leave time taken, or for fixed-rate dollar amounts:
   • If the entry is to add a Time Block for regular hours worked:
     a) In the ‘In’ box, enter the time that the employee started work. (Roll your cursor over the Question Mark, ? to see what formats are accepted by time-entry fields.)
     b) In the ‘Out’ box, enter the time that the employee ended work.
   • If your entry is to add a Time Block of Leave Hours being taken (e.g. sick, vacation):
     a) In the ‘Hours’ box, enter the number of leave hours the employee is taking.
   • If your entry is to add a fixed-rate dollar amount (e.g. tips):
     a) In the ‘Amount’ box, enter the dollar amount. (e.g., 65 or 55.32).

9. When checked, the ‘Apply time to each day’ checkbox will enter the same Time Blocks each day, for the range of dates you entered. Uncheck this box for an overnight shift.

10. When finished, click Add. This adds a Time Block either for the regular hours worked, the leave hours taken or the fixed dollar amount you entered.

    ![Example of the three types of Time Blocks]

    This image shows time blocks entered for regular hours, leave hours (i.e., sick) and fixed dollar amounts (i.e., tips).

**Editing Existing Time Blocks**

To edit a Time Block already clocked or entered on an employee’s timesheet as regular work hours, leave hours, or fixed-rate dollar amounts:

1. Use the ‘sort and filter’ or ‘search by’ fields to find the employee’s timesheet you want to edit.
2. Click on the underlined Document ID number to open that timesheet on the Time Detail tab.
3. In the Pay Period calendar, click on the underlined name of the Assignment you want to edit. (In the illustration above, you would click on ‘Cust Serv Desk’).
4. This reopens the ‘Add Time Blocks’ entry box and you can edit the Date Range, and/or the Earn Code.
5. Depending on which Earn Code was selected, you can also edit the In and Out times, the number of Hours, or the Amount.
6. When finished with your editing, click Update.
7. Verify that the Time Blocks are correct before you exit the timesheet.

**Deleting a Time Block**

To delete a Time Block already clocked or entered on an employee’s timesheet:

1. Use the ‘sort and filter’ or ‘search by’ fields to find the employee’s timesheet you want to edit.
2. Click on the underlined Document ID number to open that timesheet on the Time Detail tab.
3. To delete a Time Block from the Pay Period calendar, click on the red ‘X’ button in the upper right-corner of that Time Block. (See the Time Block illustration above.)
4. When asked to confirm the deletion, click OK to delete it.

Approving a Missed Punch Document

Missed Punch documents submitted by employees route to the Supervisor’s OneStart Action List for approval.

The system sends the Supervisor an email notification. The supervisor may or may not see the email, depending on how they have set their Action List email preferences.

Each Pay Period, Supervisors should open and review every Missed Punch document in their Action list. They can approve it or edit the document (to correct the missed punch clock action entered by the employee) and then approve it. This document cannot be disapproved. This approval verifies the Time Block is correct and should be included in the work hours for that employee.

To approve a Missed Punch Document in your Action List:

1. In OneStart, go to your Action List and open it.

2. In the list of documents retrieved, click on the underlined Document Id of the Missed Punch document you want to review and approve. (This opens the document.)

3. Review the entries on the document to ensure they are correct. Before you approve the document, you can change the Assignment, Missed Action Date, and/or Missed Action Time fields to correct any mistakes entered for the missed punch.

4. (Optional) You can also add a Note to explain any changes you entered, or to add an attachment such as a copy of an email from the employee.

5. When finished, click Approve. (This is the only action you can take on this document.)

Warning! Employees can submit one Missed Punch document per Time Block, but it cannot be more than 24-hours in the past. (A Time Block consists of a clock-in and a clock-out.)

You also have the option to approve a Missed Punch document in Kuali Time.

To approve a Missed Punch Document (in Kuali Time):

1. On the Admin tab (or System Admin tab if you have that tab), under Inquiries, click on the Missed Punch Inquiry link. That opens the Document Search screen.
2. Enter enough search criteria to find results. You can enter Initiator, Document Id, Date Created From and Date Created To, Department, Work Area, Timesheet Document Id, or Missed Clock Action.

3. Click Search.

4. In the list of results retrieved, click on the underlined Document Id of the Missed Punch document you want to review and approve. (This opens the document.)
5. Review the entries on the document to ensure they are correct. Before you approve the document, you can change the Assignment, Missed Action Date, and/or Missed Action Time fields to correct any mistakes entered for the missed punch.

6. (Optional) You can also add a Note to explain any changes you entered, or to add an attachment such as a copy of an email from the employee.
   a. Enter the text of the note into the ‘Note Text’ input box.
   b. To add an attachment, click Choose File, and in the dialog box that opens, find the file you want to attach, and then click Open. (This uploads the file to the Missed Punch document.)
      The name of the attached file will then show in the ‘Attached File’ section of that note along with a download attachment link that users can click to open and view it.
   c. Click Add to save the note (and any attachments).

7. When finished, click Approve. (This is the only action you can take on this document.)

8. To close out of the document, click Close.
At the end of each two-week Pay Period, any Missed Punch documents, not yet approved, will be auto-approved by the system.

Employees can only submit one Missed Punch document per Time Block, and it cannot be greater than 24-hours in the past. If an employee forgot to clock for an entire shift, they should not submit a Missed Punch document. Rather, they should contact their supervisor to report their timesheet needs to be corrected.

Adding a Timesheet Note

Anyone with access to a timesheet (employee, supervisor, payroll processor, reviewer, or administrator) can enter (and view) a note in the Note section accessible at the bottom of both the Clock tab and Time Detail tab. These users can also attach a file as an Attachment within a Note. The Note section is located at the bottom of the page on both the Clock tab and the Time Detail tab.

To add the first note, open the Note section, click 'add notes' and the notes entry page will appear. You can also attach documents and images as desired. Be sure to click save on the notes line to save your note. Notes are saved in the Kuali Rice (Workflow) system which also routes the timesheet documents for approval.

1. Click on the Note section to expand it.
2. To add the first note, click the Add Note button in that section.
3. In the Note textbox that appears, type a note and click Save.

Once a note has been added, the timesheet displays that note and provides a blank textbox where you can enter and save a new note.

Since corrections/additions to timesheets are made based on these notes, the “edit” and “delete” buttons on saved notes have been disabled. To maintain the integrity of the notes, you will need to add a new note with any corrections.

You can also add an attachment, such as a Word, Excel or email file to a note:

1. In the 'Attachment' field just below the Note textbox, click the Browse... button.
2. If you are using Internet Explorer, this opens the 'Choose File to Upload' dialog box. If you are using Firefox, this opens the ‘File Upload’ dialog box. If you are using Chrome, this opens the ‘Open’ dialog box. Select the name of a file to upload and click Open.
3. Verify the Attachment field shows the selected file is ready to upload, then click Save. The title of the file you attached will appear next to a download link.
4. If you click the download link, it allows you or others, such as your timesheet approvers to view the attached file.

⚠️ Warning! ▶️ In the timesheet Notes, do NOT enter text or attach a document that contains sensitive information such as SSN's or HIPPA-related data.

Deleting Automatic Meal Deductions
Departments have the option to set up automatic lunch (meal) deduction rules for Clock-Entry employees. Once a rule becomes effective, all employees have to do is clock in and clock out (while working the minimum number of hours required for this deduction), and the timesheet will automatically deduct the meal (whether breakfast, lunch, or dinner), usually 30 minutes (0.50 hours) or 60 minutes (1 hour).

Timesheets will show the amount of time deducted for a meal, highlighted in a yellow bar, at the bottom of a clocked time block.

If an employee works through a scheduled meal, or works a shorter shift (usually 6 hours) that qualifies for an automatic deduction without taking any meal break, you can delete the automatic meal deduction and the timesheet will credit those minutes back to the employee’s timesheet as work hours.

To remove an automatic lunch or meal deduction:

1. On the Approvals or Payroll Processor tab, find the timesheet for that employee.
2. Click on the Document Id of the timesheet to open it and go to the Time Detail tab.
3. Find the Time Block showing the lunch or meal deduction that needs to be deleted.
4. In the yellow bar showing the number of minutes being deducted for the lunch or meal, click on the red ‘X’ button.

That will delete the lunch or meal deduction and add those minutes back as work hours on the timesheet.

Viewing Employee Jobs, Assignments and Time Roles

From the ‘monitor and approval’ page, you can view an employee’s jobs and time assignments, and see if they have any roles in Kuali Time, such as Approver or Department Administrator.

This opens the Person Info tab for that employee and shows their Principal Id (University Id) and Principal Name (Username).

1. To view an employee’s job(s), time assignment(s) or role(s), click on the Name of the employee.
2. This opens the Person Info tab for that employee.
   - Click on the Jobs section to view details about the employee’s job and time assignments.
   - Click on the ‘Click to expand assignments’ text to view the employee’s assignments.
   - Click on the Roles section to view what roles the employee has in Kuali Time.
3. Click the Return button (at the top of the page) to return to your ‘monitor and approval’ page.

Adjusting Shift Differential Hours

Approvers or Payroll Processors may have to adjust shift differential hours for Manual-Entry employees working an overnight shift that starts in one pay period, but ends in the next pay period (e.g., 11 PM to 7 AM), because the Minimum Hours (for shift pay) will not be met before the end of the first Pay Period.
Adjusting Overtime Hours for Work Study Employees

Employees in Work Study jobs do NOT earn regular overtime when they work more than 40 hours per week. If a timesheet for a Work Study employee shows overtime (OVT), look at the total number of hours the employee worked. Then, edit the timesheet so the regular pay hours total 40, and manually enter any additional hours worked (over 40) under the OVW (Overtime Workstudy) earn code.

Please contact the Payroll Processor in Payroll, who is assigned to assist you if you have any questions about entering work hours for work study employees.

Timesheet Approval and Routing

This section explains how timesheets are routed for approval, briefly reviews issues that might prevent you from approving a timesheet, and explains how to approve one timesheet or multiple timesheets.

Employee Approvals

Employees do not need to approve their timesheets. Timesheets are automatically routed to Supervisors for approval, at the end of each pay period. An employee can still enter edits on their timesheet until it is approved by their Supervisor. Once this first approval is done, the employee may no longer make any changes to the timesheet.

Supervisor (Time Approver) Approvals

Timesheets route from employees to Supervisors at the end of the pay period (midnight on the second Saturday of that two-week period). Supervisors must approve timesheets for the employees in the Work Areas they supervise. When Supervisors approve timesheets, they verify that the hours worked are correct and recorded under the correct assignment.

Payroll Processor Approvals

Payroll Processors approve timesheets for all the employees in their Department. The Payroll Processor’s approval verifies that it is okay to pay employees for the hours worked. Timesheets will be available for Payroll Processor approval as soon as they have received Supervisor approval. If an employee has multiple assignments in multiple Work Areas, or multiple Departments, the Payroll Processor will not receive that timesheet for approval until all the Supervisors have approved it.

Any timesheets not yet approved by Supervisors, will be auto-approved by the system and available to Payroll Processors on Wednesday morning.

Payroll Processor approvals function just as Supervisor approvals described above, except these approvals are the final approvals required in Kuali Time. Payroll processors have until 3:00 PM Wednesday, following the end of a pay period, to approve timesheets. After 3:00 PM on Wednesday, the interface with HRMS Payroll begins, and on Thursday, employee hours will be available for approval on the payroll vouchers.

Supervisors and Payroll Processors will be notified via Kuali Time email listservs or OneStart announcements if there are any changes to the normal approval schedule.

Warning! The Approve button will not appear in the timesheet ‘Action’ column for Payroll Processors until they log in using their OTP (One Time Password) token.
Timesheets Not Ready to Approve

Some timesheets may have problems that prevent them from being approved. In this case, the Supervisor or Payroll Processor should make needed corrections to the timesheet before approving it. For some departments this is the only approval, and it verifies that it is okay to pay employees for the hours worked, and the timesheet becomes Final.

The Time Detail tab will display error and warning messages at the top of the timesheet in red text. Most entries, such as using sick or vacation time in excess of available balances, will issue a warning.

If there are only warnings, the timesheet will advance for approval, but the warning stays on the timesheet so the Supervisor and Payroll Processor will see it during approvals.

Timesheets with problems will not appear with an approval button in the Action column (the column will be blank). These timesheets must be individually opened and corrected before approval can occur.

Supervisors or Payroll Processors will be unable to approve timesheets with the following problems:

Overlapping Time blocks: Time blocks which include the same hours.

Hours charged to an invalid assignment: This means hours were charged to an assignment that was later deleted or end-dated on a prior date. A warning message will be displayed when viewing a timesheet with invalid Time blocks. To correct this problem simply open the timesheet, and make any needed corrections to the employee’s hours or assignment.

Expected Hours are not met: Appointed staff employees have a number of expected hours that must be accounted for each week. For example, a full-time Biweekly employee must account for 40 hours, while a half-time Biweekly employee needs to account for 20 hours each week.

ABS hours exceed standard hours: For a Biweekly employee, hours charged to ABS (Absent without benefits) must not exceed Standard Hours (40 hours each week for a full-time Biweekly employee).

Corrective action should be taken to fix any errors or warnings that violate University or departmental policies

Approving Timesheets

Detailed steps are presented below for performing individual and bulk timesheet approvals. Please note these procedures list all the possible steps, including ones where you may need to change automatic lunch deductions or enter a correction on a timesheet. If you have already performed that step or find it unnecessary, please go to the next step in the procedure.

To approve an individual timesheet, follow these steps:

1. Log in to Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. Select the Department you wish to approve from the Department dropdown. That displays an ‘Action List’ of timesheets you can review and approve.

   - You can use the Work Area field to sort and view your timesheets by a specific work area.
   - You can use the Approval Status field to view which timesheets are approvable (or to view the ones that are un-approvable).
• You can use the Search By field to search for a specific timesheet by Document ID, Principal ID (University ID), Principal Name (Username), or Last Name. Select the parameter you wish to search by and in the Value field, enter the specific value you want to find, and then click Search. (Note: You must enter at least 5 characters into the Value field to start a search.)

3. Review the Summary of hours for that timesheet. You can click on the plus button next to the employee’s name to open a view of the timesheet summary section and view the hours recorded under each Assignment. [Click the minus button to close the Summary section.]

4. If necessary, enter any changes to the Time Blocks for regular hours, leave hours or dollar amounts on the timesheet. You can also delete automatic meal deductions if an employee worked without taking a meal:
   a. Click on the Document Id to open that timesheet on the employee’s Time Detail tab. In the Pay Period calendar, you can add, edit or delete regular Time Blocks, leave hours, or amounts.
      i. To add a new Time Block, or a block of leave hours or dollar amounts, click on a day, complete the fields on the ‘Add Time Blocks’ entry box and click Add. If the Time Block goes across multiple days, make sure the ‘Apply time to each day’ box is CHECKED.
      ii. To edit any Time Block on that timesheet, click on the underlined Assignment name within that block to open the ‘Add Time Block’ entry box. You can modify the Date Range, and/or the Earn Code. The fields in the entry box change based upon the Earn Code selected, so you may need to modify the In/Out times, the Hours, or the Amount to complete your correction. When finished with your edits, click Update.
      iii. To delete any Time Block from the timesheet, click on the red ‘X’ button in the upper right corner of the block. A confirmation message opens, asking you to click OK to confirm the delete, (or click Cancel to cancel it.)
      iv. (Optional step) To delete an automatic meal deduction, and credit the meal hour(s) as regular work hours, find the meal deduction Time Block that needs to be removed. In the yellow bar showing the number of minutes deducted for the meal/ or lunch, click on the red ‘X’ button.
   b. When finished with this timesheet, click Return in the header to return to your Approvals or Payroll Processor tab.

5. To approve an individual timesheet, you can use any of three methods:
   • If the timesheet is still open on the pay period calendar (you didn’t return to your Action List), click the Approve button located just below the calendar.
   • On your Action List, click the “Select” checkbox for that timesheet and then click the Approve
button (located next to the checkbox)

- Click the Approve button at the bottom of the Action List page, to approve that one timesheet.

This completes the approval, grays-out the Approve button for that timesheet, (and if is the final approval, updates the ‘Status’ field of the timesheet to show “Final.”)

6. To update the ‘Document Status’ for that timesheet on your Action List, you can click the Refresh Status button.

To approve more than one timesheet or to do bulk approvals:

1. Log in to Kuali Time and go to the Approvals or Payroll Processor tab.
2. Select the department you wish to approve from the Department dropdown. That displays a list of timesheets you can approve.
   - You can use the Work Area field to sort and view your timesheets by a specific work area.
   - You can use the Approval Status field to view which timesheets are approvable (or to view the ones that are un-approvable).
3. Review the timesheet summary of hours information for each employee. You can click on the plus button by the employee’s name to pop open a ‘summary view’ which shows you the hours that employee recorded, by Assignment. [Click the minus button to close up the summary.]
4. If necessary, enter any changes to the Time Blocks, leave hours or amounts on these timesheets, and/or delete any automatic meal deductions if an employee worked without taking a meal.
   a. Click on the Document Id, which opens that timesheet on the employee’s Time Detail tab. In the Pay Period calendar, you can add, edit or delete regular Time Blocks, leave hours or amounts.
      i. To add a new Time Block, or a block of leave hours or dollar amounts, click on a day, complete the fields on the ‘Add Time Blocks’ entry box and click Add. If the Time Block goes across multiple days, make sure the Apply time to each day box is CHECKED.
      ii. To edit any Time Block on that timesheet, click on the underlined Assignment name within that block to open the ‘Add Time Block’ entry box. You can modify the Date Range, and/or the Earn Code. The fields in the entry box change based upon the Earn Code selected, so you may need to modify the In/Out times, the Hours, or the Amount to complete your correction. When finished with your edits, click Update.
      iii. To delete any Time Block from the timesheet, click on the red ‘X’ button in the upper right corner of the block. A confirmation message opens, asking you to click OK to confirm the delete, (or click Cancel to cancel it.)
      iv. To delete an automatic meal deduction, and credit the meal hour(s) as regular work hours, find the Time Block(s) with the meal deduction that needs to be removed. In the yellow bar showing the meal deduction, click on the red ‘X’ button.
   b. When finished with the timesheet, click Return in the header to return to your Approvals/Payroll Processor tab.
   c. Repeat this step (step 4) for each timesheet you need to adjust.
5. To mark a timesheet in your list as ready to approve:
   a. Click the “Select” checkbox for that timesheet. You can select multiple timesheets in your Action List as ready to approve, but you must select each one individually.
b. To mark ALL timesheets in your list for bulk approval, use the select “all” checkbox at the top of the ‘Select’ column.

6. To take the bulk approval action for the selected timesheets, click the “Approve” button at the bottom of your Action List page.

   This completes the approval, grays-out the Approve button for those timesheets, (and if this is the final approval, updates the ‘Document Status’ for each to show as “Final.”)

7. To update the ‘Document Status’ for those timesheets on your Action List, you can click the Refresh Status button.

When finished approving your timesheets you can logout.

Automated Approvals

If a Supervisor fails to approve a timesheet, the Kuali Time system will do an auto-approval for that Supervisor (at midnight on the Tuesday following the end of the pay period) in order to route that timesheet on to the Payroll Processor. The Supervisor will receive an FYI notification that the system did this approval. Accessing the timesheet via the action list will clear the FYI from the action list.

If a Payroll Processor fails to approve a timesheet, the Kuali Time system will do an auto-approval for that Payroll Processor (at 3:00 PM on the Wednesday following the end of the pay period) in order to final approve that timesheet. The Payroll Processor will receive an FYI notification that the system did this approval. Accessing the timesheet via the action list will clear the FYI from the action list.

Important! The system auto-approvals are NOT to be used in lieu of reviewing and approving timesheets.

The system does these auto-approvals as a fail-save measure to ensure that employees are paid if a problem keeps a Supervisor or Payroll Processor from completing their normal approvals.

Auto-approvals performed each pay period are audited by Payroll and departments may be contacted to explain why that timesheet was not approved.

Time Hours on the Payroll Voucher
The hours transmitted from Kuali Time will be loaded as "protected" on the payroll voucher, so these will always remain unchanged for audit purposes. However, the hours may be adjusted up or down, if needed, by adding or subtracting hours from the appropriate earn code using the “Add Hours” button to generate a blank line.

To add hours to a voucher that has Kuali Time hours already loaded, click on the “Add Hours” button, to add a blank row. Changes made in this way will not retroactively be recorded on the timesheet.

If every employee on a Payroll Voucher is a Kuali Time employee with hours brought over from Kuali Time for at least one week of the pay period, then the Payroll Voucher will already be approved in HRMS. If the Voucher contains any employees who don’t record their hours in Kuali Time or any Kuali Time employees who recorded no hours for the pay period, then the Payroll Processor must go into the voucher and select “Approve All”.

Warning! Do NOT enter information on the payroll voucher for Kuali Time employees before the Time data has been loaded to the Vouchers. Any data manually entered on the Vouchers will be wiped out by the Time Extract data load and lost.
Checking the Route Log

The Route Log for a timesheet shows who has approved a timesheet and who still needs to approve it.

To check the Route Log for a document, open an employee's timesheet and click on the Route Log section at the bottom of their Time Details tab. The Route Log will open and show who has taken action and whose action, if any, is still pending.

- The Document ID section contains identifying information about the document itself.
- The Actions Taken section shows who has taken action on the timesheet and when. Note that timesheets will appear here as initiated by the employee, though the Kuali Time system initiates them on behalf of the employee. Timesheets are completed by the employee and submitted by the system for approval at the end of the pay period.
- The Pending Action Requests section shows who still needs to take action on the document. It is possible that multiple requests exist at the same time. This situation will occur if the employee has multiple Time Assignments with different Supervisors.
- The Future Action Requests section shows who will need to take future action on the document.

Time Reports in IUIE

Reports generated from Kuali Time data are available in the Indiana University Information Environment (IUIE). IUIE is a web-based interface that gives users access to data from several university applications, including Time. Users can customize the environment to meet their data reporting needs.

Prior to using IUIE, users must have an IUIE account. Supervisors and Payroll Processors should receive an IUIE account when their Kuali Time access is granted.

For more information about IUIE, or to request an account, visit the IUIE web page via Onestart or: https://www.indiana.edu/~iuie/prod/iuieWelcome.html

For more information about using the IUIE and the reports available there, see the TIME User Documentation page: https://fms.iu.edu/payroll/kuali-time/
More Options for Approvers
This section discusses other options that Kuali Time provides for Supervisors and Payroll Processors, which were not discussed in the previous sections of this manual. It also includes a brief review of how to view the timekeeping rules set up for your department.

Using Inquiry Pages
On the Admin tab, Kuali Time provides four Inquiry screens that are useful tools to look at the time blocks recorded on a timesheet, to view the history of time blocks added or deleted from a timesheet, to see the clock transactions logged by an employee, and to find any missed clock punch documents submitted by or for an employee.

Time Block Inquiry
Reviewers, Supervisors, Payroll Processors, and Department Administrators who have employees in Kuali Time can use the Time Block Inquiry to view the time blocks recorded on a particular timesheet, or for a specific employee.

Important! Time Blocks are never deleted from the system, they are just inactivated.

To perform a Time Block Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Time Block Inquiry” link.
2. Enter the Document Id of the timesheet you want to view the time blocks entered on that particular timesheet.
3. You can also search by other criteria including the Principal Id (University Id of employee), User Principal Id (University Id of person who entered the Time Block), Document Status and Date From and Date To (to find Time Blocks entered on a specific date or range of dates).
4. Click Search.

The results of this search are displayed in a tabular format and include: Document Id, Principal Id, Job Number, User Principal Id, Earn Code, Work Area, Task, Hours or Amount, Overtime Preference, Lunch Deleted, and Begin Time and End Time.
5. (Optional step) You can click on any of the (underlined) Document Id numbers in the results to open a page that shows a full description of that Time Block. The details displayed are the TimeBlock Id, Document Id, Job Number, Work Area, Earn Code, Begin Time, End Time, and the Hours or Amount (if applicable), User Principal Id, Principal Id, Overtime Preference, Lunch Deleted, Time Stamp, along with a confirmation indicating whether or not the entry was logged by the clock.

At the bottom, are the Time Hour Details, which show the Earn Code, Hours and/or Amount, (including any minutes deducted for a lunch or meal.) Click Close to exit this page.

6. Click Cancel to close the search results page and return to the Admin tab.

Time Block History Inquiry

Reviewers, Supervisors, Payroll Processors, and Department Administrators who have employees in Kuali Time can go to the Admin tab and use the Time Block History Inquiry to view the history of time blocks entered on a particular timesheet or for a specific employee. The history that is recorded will show when time blocks were added, updated, or deleted from that employee’s timesheet.
Important! Time Blocks are never deleted from the system, they are just inactivated.

To perform a Time Block History Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Time Block History Inquiry” link.
2. Enter the Document Id of the timesheet you want to view the history of any Time Blocks clocked, added, or deleted on that particular timesheet.
   - You can also search by other criteria including the Principal Id (University Id of employee), User Principal Id (person who added/removed the time block), Document Status, and the Date From and Date To fields.
3. Click Search.

The results of this search are displayed in a tabular format and include: Document Id, Principal Id, Time Block Id, Work Area, Task, Job Number, Earn Code, Begin Time and End Time, and Hours or Amount, and User Principal Id, along with a confirmation indicating whether the action was recorded in the clock log, what Action History was performed on that Time Block (add, clock, missed punch, or delete), and time when it was modified.

4. (Optional step) You can click on the (underlined) Document Id link in the search results to open a full description of that historical Time Block. The details shown in this Inquiry screen are the Time Block Id, Document Id, Principal Id, Work Area, Job Number, Earn Code, Begin Time, End Time, Hours or Amount, along with the Clock Log Created confirmation, Action History indicator, User Principal Id, and time when it was modified. (Click Close to exit this page.)
5. (Optional step) You can click on the (underlined) Time Block Id link in the search results to open the Time Block Inquiry screen and view the details about that Time Block. (Click Close to exit this page.)

6. (Optional step) You can click on the (underlined) Principal Id or User Principal Id links in the search results to open an Inquiry screen for that person, which shows their Kuali Affiliation Type (student, staff), along with their basic employment information. (Click Close to exit this page.)

7. Click Cancel to close the search results page and return to the Admin tab.

Clock Log Inquiry

Reviewers, Supervisors, Payroll Processors, and Department Administrators who have employees in Kuali Time can use the Clock Log to view the clock transactions logged on a particular timesheet.

To perform a Clock Log Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Clock Log” link.
2. Enter the Document Id of the timesheet or Principal Id of the employee you wish to view. (You can also search by Work Area, Task, IP Address or Clock Timestamp From and Clock Timestamp To.)
3. Click Search.

The results of this search are displayed in a tabular format and include: Document Id, Principal Id, Work Area, Task, IP Address, Clock Action, Job Number, User Principal Id, Clock Timestamp, Clock Timestamp Timezone, Timestamp, and Missed Punch Document Id.
4. (Optional step) If you click on an employee’s (underlined) Principal Id, Work Area, or Task link, it opens an Inquiry page which shows details about that person, work area or task. (Click Close to exit page.)
5. Click Cancel to close the search results page and return to Admin tab.

**Missed Punch Inquiry**

Reviewers, Supervisors, Payroll Processors, and Department Administrators with Clock-Entry employees can use the Missed Punch inquiry to find Missed Punch documents that were submitted by or for employees to report missed clock punches.

<table>
<thead>
<tr>
<th>Document Id</th>
<th>Principal Id</th>
<th>Work Area</th>
<th>Task</th>
<th>Clock Action</th>
<th>Job Number</th>
<th>UserPrincipal Id</th>
<th>Clock Timestamp</th>
<th>Note</th>
<th>Missed Punch Title</th>
<th>TimeStamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000</td>
<td>10000000000</td>
<td>CI</td>
<td>0</td>
<td>0</td>
<td>1000000000</td>
<td>09/07/2010 12:00 AM</td>
<td>America/Indianapolis</td>
<td>09/07/2010 12:00 AM</td>
<td>0108700</td>
<td></td>
</tr>
<tr>
<td>10001</td>
<td>10000000001</td>
<td>CO</td>
<td>0</td>
<td>0</td>
<td>0000000008</td>
<td>09/07/2010 01:00 AM</td>
<td>America/Indianapolis</td>
<td>09/07/2010 01:00 AM</td>
<td>0108700</td>
<td></td>
</tr>
<tr>
<td>10002</td>
<td>10000000002</td>
<td>CI</td>
<td>0</td>
<td>0</td>
<td>0000000008</td>
<td>09/07/2010 01:00 AM</td>
<td>America/Indianapolis</td>
<td>09/07/2010 01:00 AM</td>
<td>0108700</td>
<td></td>
</tr>
</tbody>
</table>

To perform a Missed Punch Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Missed Punch” link.
2. This opens the Document Search screen (with the Document Type pre-loaded as ‘MissedPunchDocument.’)
   - Enter the Document Id of the Missed Punch document that was submitted by either you or the employee.
   - If you don’t have the Document Id then you can search for any Missed Punch documents by Initiator (Username of the person who submitted the document, usually the employee), by Department, or by a date range in the Date Created From and Date Created To fields.
   HINT: Use the lookup ( ) button next to the Initiator field to search for a specific employee.
3. Click Search. This will find any Missed Punch Document that matches your search criteria.
The information displayed in the search results includes the Document ID, Document Type, Title, Status, Initiator, Date Created and Route Log.

4. Click on the underlined Document ID number to open a copy of the Missed Punch Document that was submitted for an Assignment so you can view the clock action, and date and time of the clock punch that was missed.
   a. If you are the employee’s Supervisor and the Missed Punch document is awaiting your approval, you have the option to edit it (before approving) to enter any corrections to the employee’s Clock Action, Action Date and/or Action Time.
   b. If the date and time of the missed punch is correct, then click Approve to approve the document.

5. Click Close to close the Missed Punch Document and return to your search results.
6. Click Cancel to close the search results page and return to the Admin tab.

Viewing Timekeeping Rules

If you are a Supervisor or Payroll Processor, you can view the business rules for your department.
On the Admin tab, all Administrative or Time Keeping (Rule) links will take you to a lookup screen. You can enter specific search criteria or simply click “Search” to view existing rules. It’s recommended that you enter at least the Department or Location code in the search criteria if you wish to see all the rules for your particular department, or campus.

Using the ‘Show History’ and ‘Active’ radio buttons on rule lookup screen
When a rule row is edited, the system adds an inactive row for that rule with the same effective date as the new row being edited/added. This will inactivate the old values and the new values will be in place as of the effective date. A key is established which then allows the search to know which rows are prior edited rows vs. new rows.

Show History: The purpose of this radio button (on a rule or maintenance lookup screen) is to allow you to see the highest effective dated row only for a record, or the entire history of a record.

If Show History = No: The results will be the highest effective dated row as of the system date and any future rows.

If Show History = Yes: The results will be all rows in the database for the values entered.

Active: The purpose of this radio button is to allow you to filter rows based on their active status.

**To find the row which is in effect as of today, search for “active = Both, show history = No.”

Rule Look-up Example
In the example below (for Clock Location Rule), we entered a Department ID (UA-FMOP) and clicked Search.

(By default, the ‘Show History’ button is set to “No” and the ‘Active’ button is set to “Yes,” to find the highest effective dated row.) This search found the active rules established for our sample department.

In this example, the rule results that were retrieved show the date and time that the (Clock Location) rule was established, when it became effective, and the department, work area and University ID of the employee who is required to clock at the IP Addresses listed in the rule.

In general, the results retrieved, will display values for most of the fields used as search criteria on that specific Administrative or Rule Lookup screen. It always shows the Effective Date (of that rule row), and whether or not it is Active.

You can view the following Time Keeping Rules for your department:
- Clock Location
- Department Lunch Deduction
- Shift Location
- Time Collection (sets employee as Clock-Entry vs. Manual-Entry)

Rules are discussed in more detail in the Kuali Time IU User Manual.

**Viewing Work Area Details**

You can use the Work Area Lookup screen to view information about the work areas in your department. Click on the Work Area Maintenance link under the Administrative section to open that Lookup screen.

1. On the Admin tab, click the Work Area Maintenance link to open the Work Area Lookup screen.
2. Enter your search criteria—you can search by Department, or by Work Area, (Work Area) Description, and Effective Date From or Effective Date To.

   **HINT:** Use the “%” symbol in any field (except date fields) as a wildcard value to indicate “ALL.”

3. Click Search to find Work Area results.

   The results of a search on this lookup screen will show you the Department, the Work Area, the (Work Area) Description, the Effective Date, the Default Overtime Earn Code, and whether it is an ‘Active’ work area.

   ![WorkArea Lookup](image)

4. Click on the view link in any search result row to open the Work Area Inquiry screen and view work area details, such as a list of Tasks under that Work Area, or a list of Approvers, Approver Delegates and Reviewers who can edit or approve that timesheets for that Work Area.
5. Click Close to close the Inquiry screen, then click Cancel to close the search results screen.