

**Approver and Timekeeper's Guide** 

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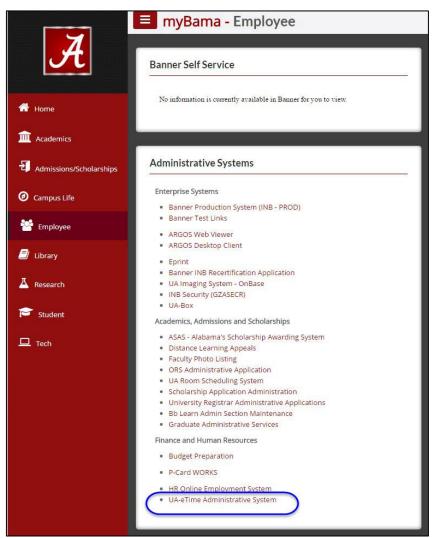
# Logging in to UA-eTime from myBama for Nonexempt eTime Approvers

- 1. Log into myBama
- 2. Go to the Employee Tab
- 3. Click "UA-eTime Icon



# Logging in to UA-eTime from myBama for Exempt eTime Approvers

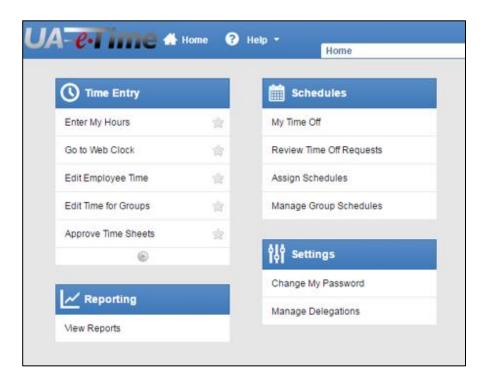
- 1. Log into myBama
- 2. Go to the Employee Tab
- 3. Click "UA-eTime Administrative System" in the Administrative Systems box.



4. You will be directed to the UA –eTime administrative system. Log in with your myBama User name and Password.

UA-Time	The University of Alabama	
	The University of Alabama	
	User ID:	
	Password:	
	Login	
	Copyright @ 1999 - 2010 WorkForce Software, Inc. All rights reserved.	
	Copyright © 1999 - 2010 Work Gree Southare, Inc. All rights reserved.	

# **UA-eTime Approver Dashboard**

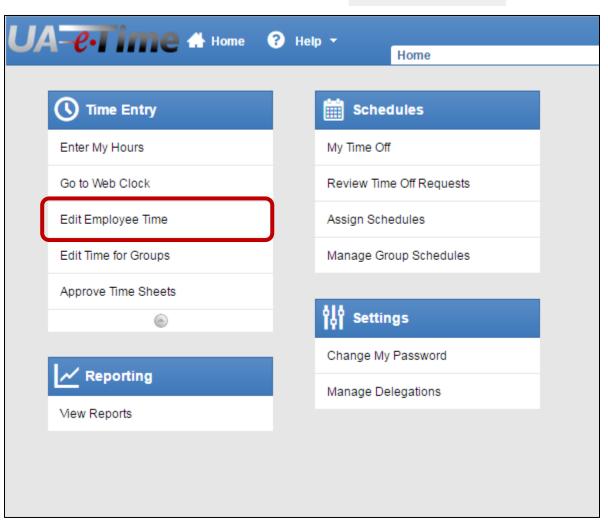




# **Manager Time Entry**

The Manager Time Entry screen allows managers to edit employee timesheets prior to approval. Managers can also view an employee's time off balances and preview their timesheet for a pay period.

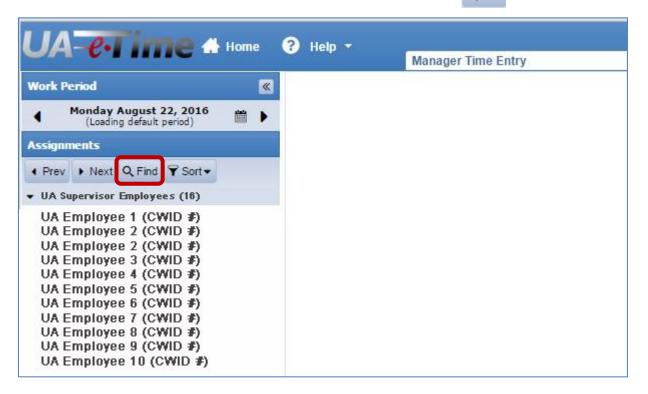
1. To access the Manager Time Entry screen click **Proof** Edit Employee Time on the Dash Board.



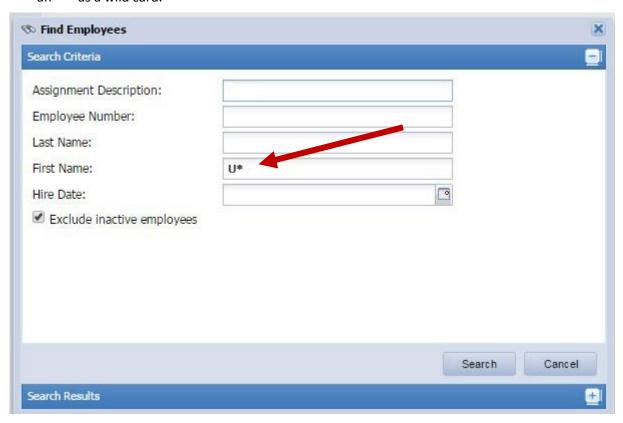
2. The Manager Time Entry Window will be displayed. A manager or timekeeper may have multiple groups assigned for review. Click the Assignment Group name to display the list of employees in the group.



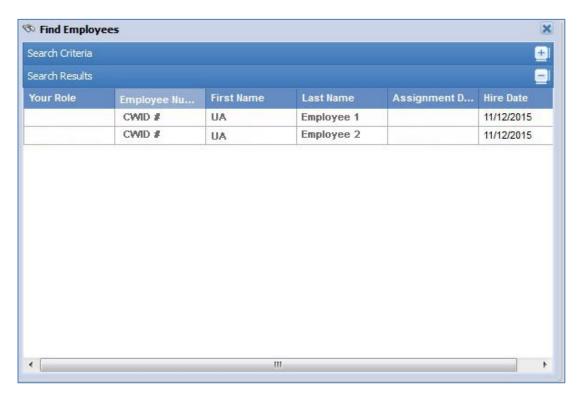
3. The employees in the Assignment group will be displayed. Click the name of the employee whose timesheet you want to view. If an employee has more than one position, select the position to view. You can also search for employees by clicking the Find button.



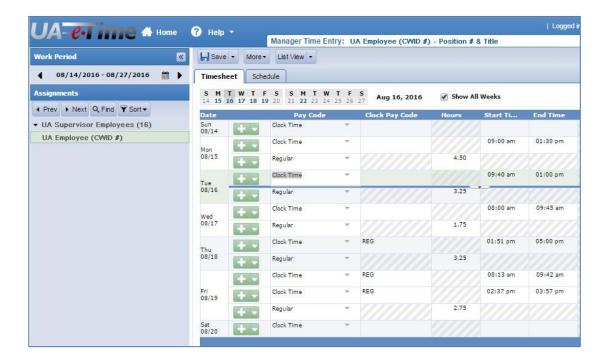
4. Find Employees allows you to search by Last Name, First Name, or CWID. Note: the name fields are case sensitive. If you are unsure of the spelling enter as much of the name as you know and an "\*" as a wild card.



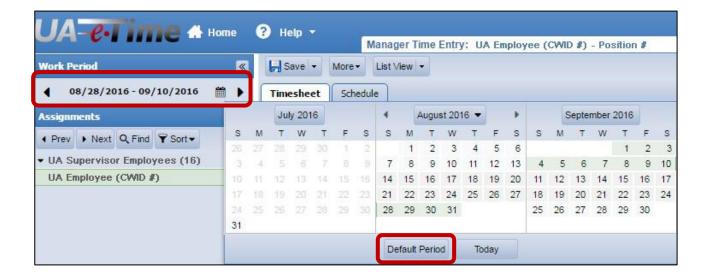
5. The employees will be displayed based on the search criteria. Click the name of the employee whose timesheet you want to view. If an employee has more than one position, select the position to view.



6. The timesheet for the selected employee and position will be displayed. The timesheet will open in the current pay period.



7. Previous or future timesheets can be displayed by clicking in the date range field under the Work Period. Click any day in a pay period to view the timesheet for the pay period, click the "Default Period" button to select the timesheet for the current pay period.



### The Timesheet

#### **Sections of the Timesheet:**

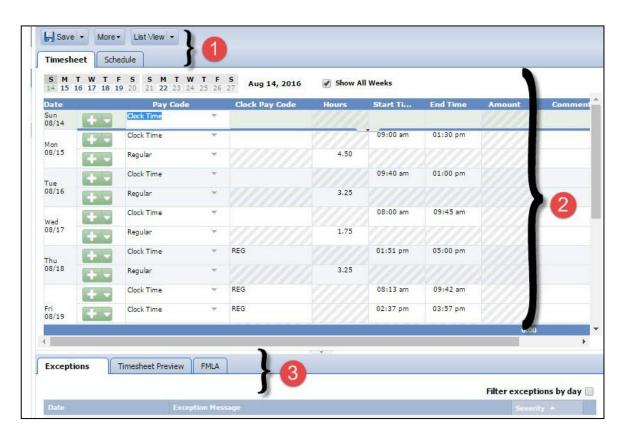
- 1. Function Icons Clickable images that provide short cuts to certain program functions.
  - Select a previous pay period to view
  - Print the timesheet
  - Change the format in which a timesheet is displayed

#### 2. Time Entry Tabs

- Timesheet Tab- Enter time on the timesheet
- Schedule Tab View the employee's schedule
- Select the pay week to review

#### 3. Information Tabs

- Exceptions View errors or warnings that may affect your pay
- Timesheet Preview View the timesheet summary for the pay period by type of earnings
- Time Off Balances View Annual, Sick, and Comp time balances as of the end of the previous pay period.
- FMLA View FMLA hours available to you (not used at this time)
- Military View Military or State Emergency Leave used in the current calendar year.
- Detail View any comments entered on your timesheet



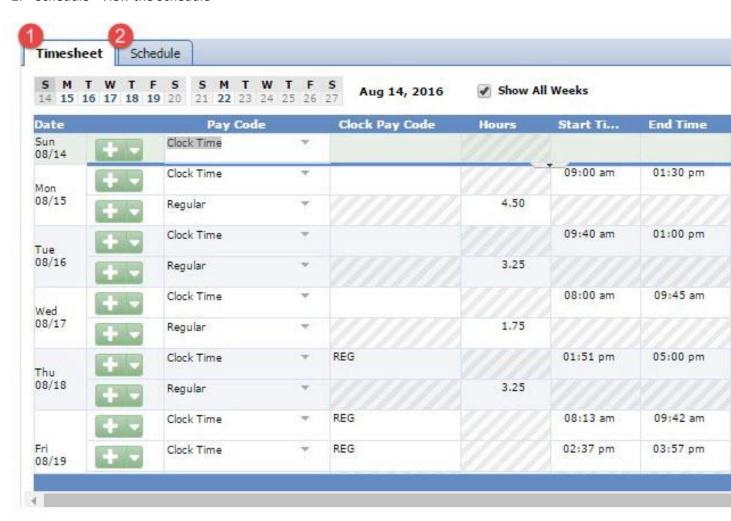
### **Function Icons on the Timesheet**



- 1. Change Pay Period
- 2. Save-Save changes to your timesheet
- 3. More Print employee timesheet
- 4. Change the display format of your timesheet
- 5. Switch Assignments

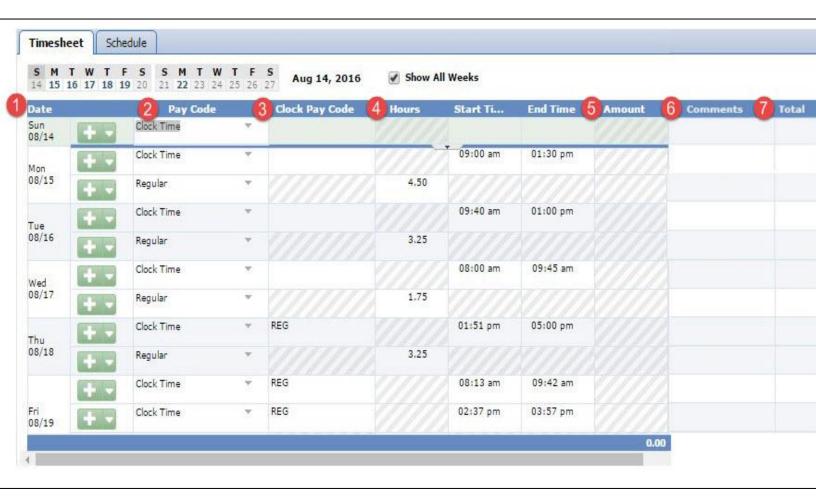
### **Timesheet Tabs**

- 1. Timesheet View and change the employee's timesheet
- 2. Schedule View the Schedule



#### **Columns on the Timesheet**

- 1. Date Days in the pay period.
- 2. Pay Code Identifies the type of pay.
- 3. Clock Pay Code This column is used to identify Call Out or Event pay.
- 4. Hours This column is used to record an employee's In and Out times for the Clock Time pay code.
  - i. It is also used to record employee's Leave Hours for all other Pay Codes.
- 5. Amount Not used at this time.
- 6. Comments Column for timekeepers and managers to enter comments related to an employee's time for the day. Column for employees to enter comments when using leave time.
- 7. Total Displays total daily hours by Pay Code.



#### Information Tabs on the Timesheet

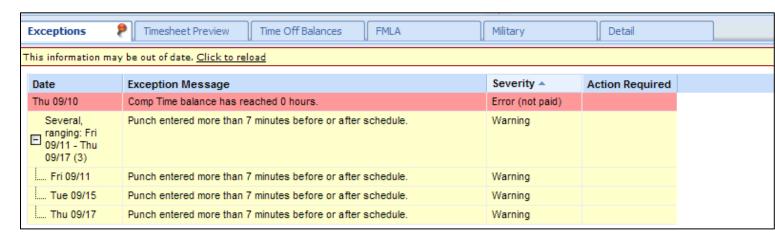
- Exceptions View warnings and errors that may affect an employee's pay.
- Timesheet Preview View total hours by pay code for the current pay period.
- Time Off Balances View annual, sick, and comp time balances.
- FMLA View available FMLA time (not used at this time).
- Military View Military and National Guard Time used in the current calendar year.



### **Timesheet Exceptions Tab**

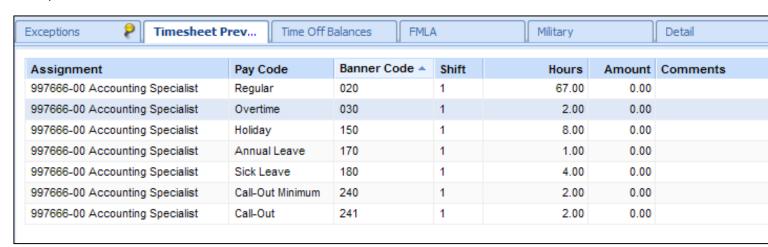
This tab displays Errors and Warnings that may affect an employee's pay.

- Exceptions in red show when there is an error on the timesheet.
- Exceptions in yellow show as a warning to information on the timesheet, such as, a clock in time more than 7 minutes before or after their scheduled time.



#### **Timesheet Preview Tab**

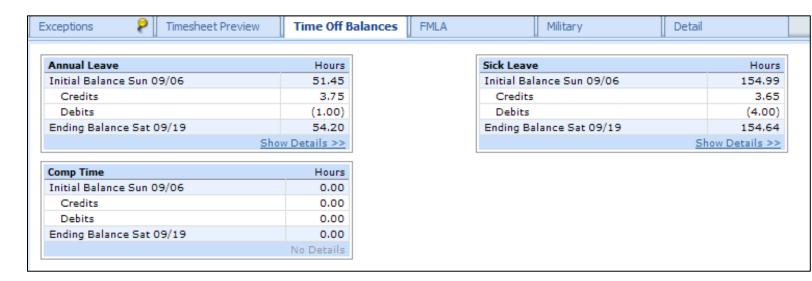
The Timesheet Preview tab displays the total hours by pay code an employee will be paid for a pay period.



#### **Time Off Balances Tab**

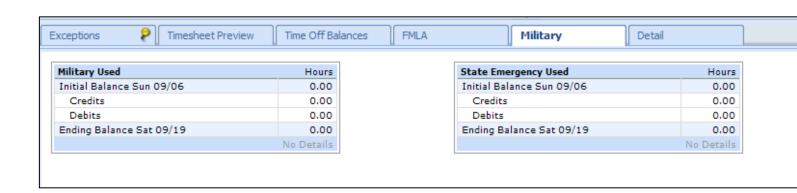
The Time Off Balances tab displays current leave balances.

- Initial Balance Balance at the end of the previous pay period
- Credits Estimated accrual for the current pay period
- Debits Leave time to be paid in the current pay period
- Ending Balance Estimated balance as of the end of the current pay period



### **Military Leave Tab**

Displays Military Leave used and State Emergency Leave used for the calendar year for employees who are in the National Guard or Military Reserve.

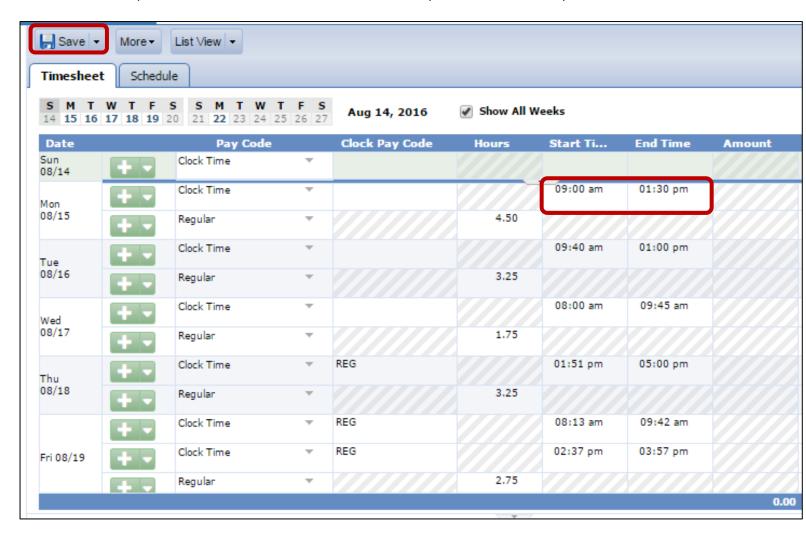


# **Review and Edit Employee Time**

After selecting the employee timesheet to edit, changes or additions can be made to the time reported on the timesheet.

- Select the day to edit.
- Enter the correct time for a missed In or Out punch in the Start-Time or End-Time column. Changing an existing In or Out punch made by the employee should rarely occur and should not be made without notifying the employee.
- Click Save to save any changes.

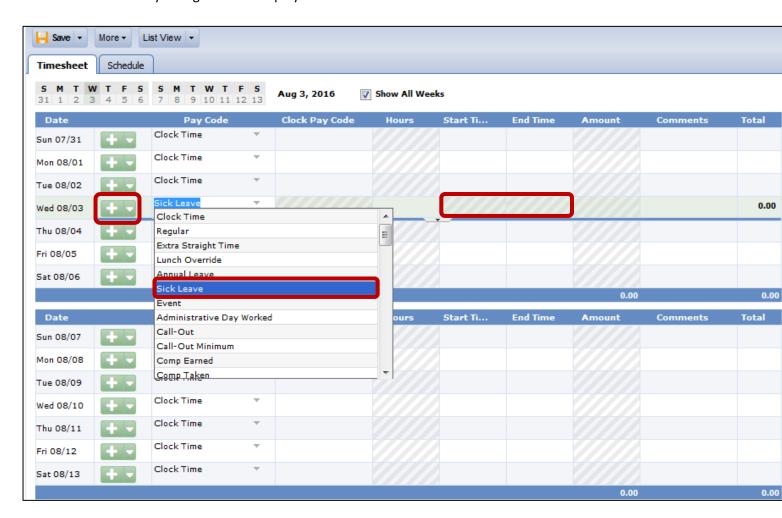
The time must be entered as 8:15a with the colon between hours and minutes and "a" for AM on morning times or "p" for PM on afternoon times. Click Save to save your entries for the day.



# **Adding Paid Leave to an Employees Time**

Supervisors will use this for Annual Leave, Sick Leave, Birthday leave, Admin Leave, Funeral Leave, Comp Time, etc. To Add Benefit Hours to an employee's timesheet a new timesheet "row must be inserted in the timesheet:

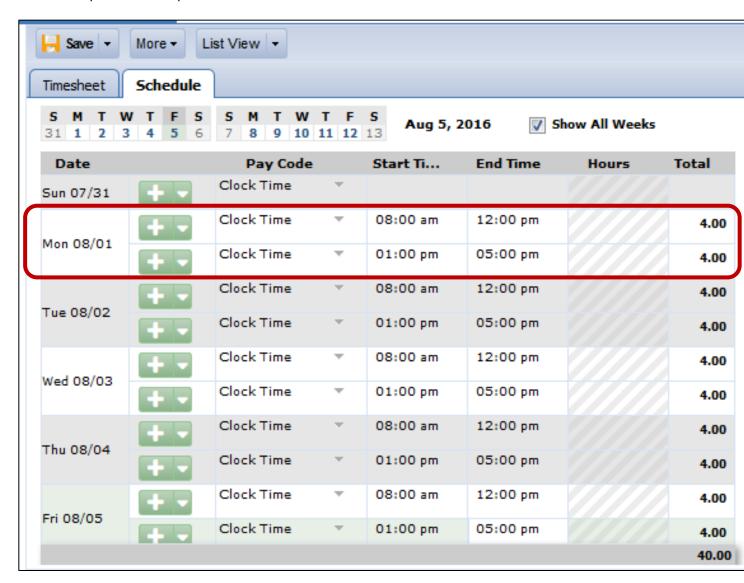
- Select the day to edit. Click the on the last timesheet row for the day. This will insert a new timesheet row.
- Click the drop down arrow next to the row inserted in the Pay Code column.
- Select the type of benefit pay to insert in the Pay Code column from the drop down list.
- Tab to the Hours column and enter the number of hours to pay for the day. Make any other necessary changes to the employee's timesheet and click Save.



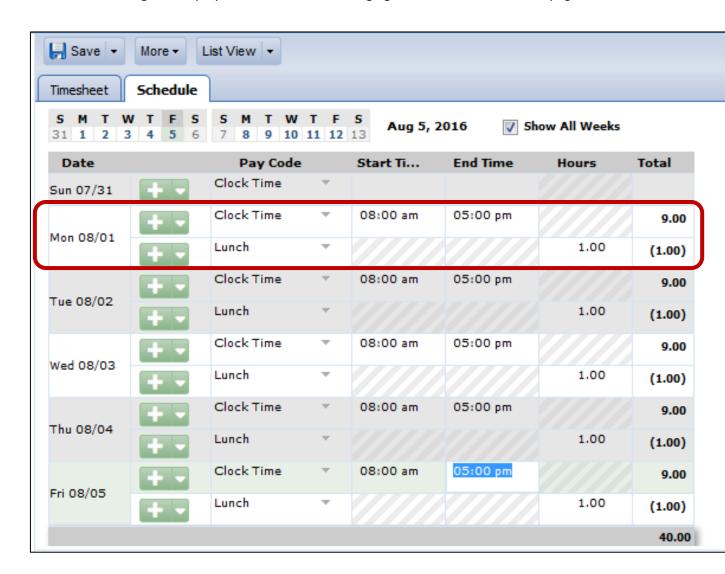
# **Employee Schedules**

To review an employee's schedule select the Schedule tab. There are 2 types of standard schedules which allow for handling of lunch periods depending on your departmental policy. To change an employee's schedule, see Managing Schedules instructions on page 31.

1. Employee records time off for lunch. Employee clocks "out" when they leave for lunch and "In" when they return from lunch. Time off for lunch will be based on the actual time elapsed between punches.

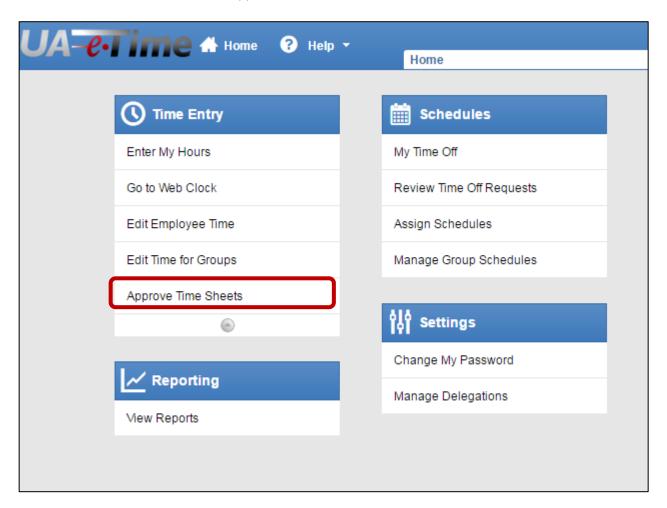


2. Employee does not clock out for lunch. The employee clocks In at the beginning of the work day and Out at the end of the work day. A lunch period is automatically deducted from the employee's total time for the day if they work at least 6 hours. If the employee takes more or less time off for lunch than they are scheduled for the supervisor can adjust the time using the Lunch Override Pay Code on the employee timesheet. These schedules are identified by a "Lunch" Pay Code with the number of hours an employee is normally scheduled for a lunch break. To change an employee's schedule, see Managing Schedules instructions on page 31.



# **Approve Timesheets**

1. From the Dashboard select Approve Timesheets



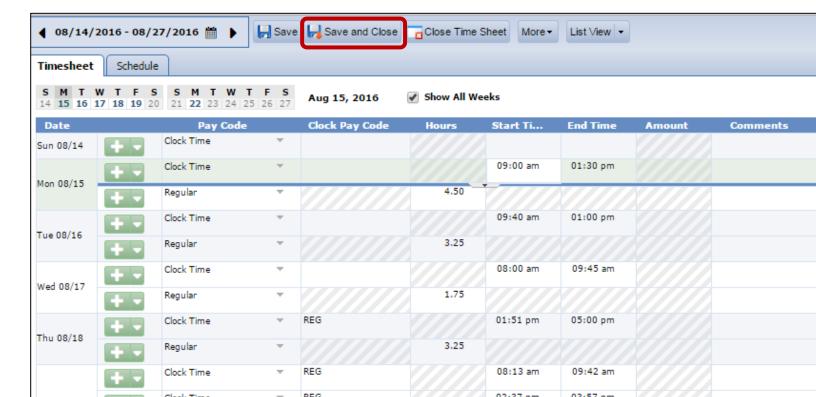
2. Select the Assignment/Approval Group to review and approve.



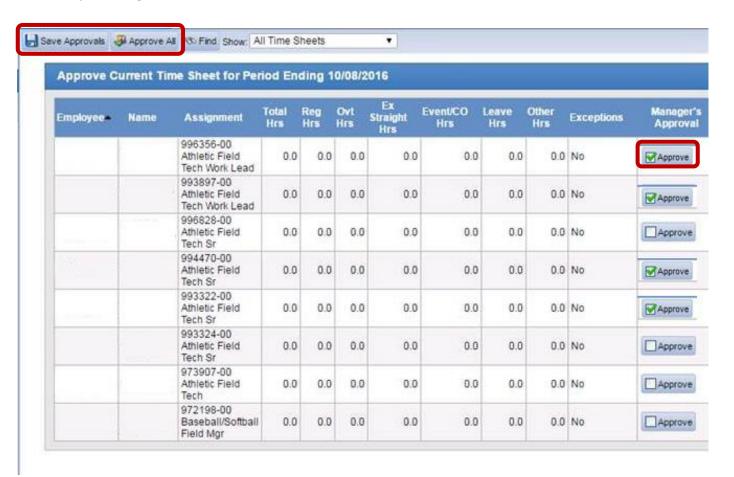
3. The list of employees in the assigned to the Approver is displayed for review.



- 4. Review a timesheet for an employee by clicking on the employee'
  - A new window is opened displaying the employee's timesheet.
  - Make any required changes to the timesheet, then click Save and close the window.



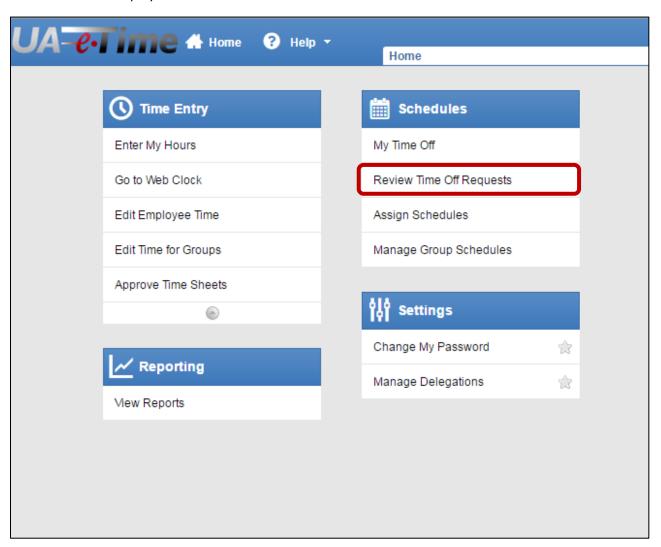
5. To approve a timesheet, scroll to the right and click the Approve box for each employee. Alternatively, click the Approve All button to select all employee timesheets on the screen. After the timesheets have been approved click Save Approvals to submit the timesheets to payroll for processing.



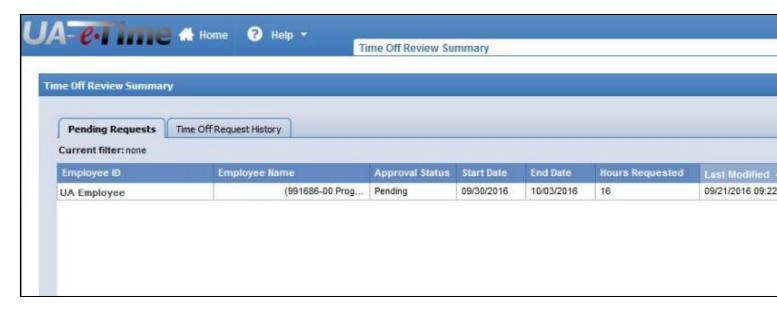
## **Review Time-Off Requests**

Employees can enter time off requests for current or future pay periods. Requests are forwarded to the employee's manager for review. If a time off request is made for a future pay period the system estimates the employee's annual or sick leave balance on the future date based on the employee's current leave balance and the employee's regularly scheduled hours.

To review time off requests submitted by your employees, select the Review Time off
Requests link on the dashboard. Approved time off requests will be inserted into the
employee's timesheet for the day requested. No further action is required to record the time
off on the employee's timesheet.



 A list of time off requests for your employees is displayed. Select the employee leave request to be reviewed.



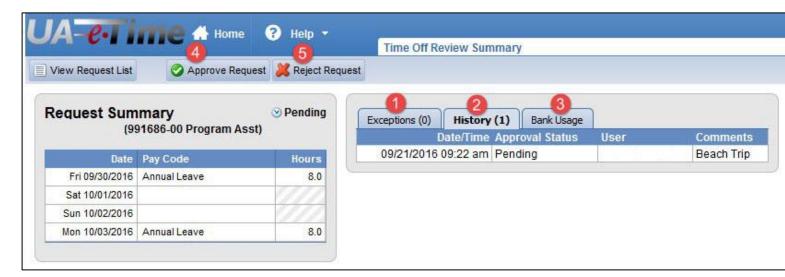
• The date and number hours requested by the employee are displayed in the Request Summary section. Estimated leave balances as of the date of the request are displayed in the "Adjusted Bank Balances" section.

The Time Off Approval Review page displays:

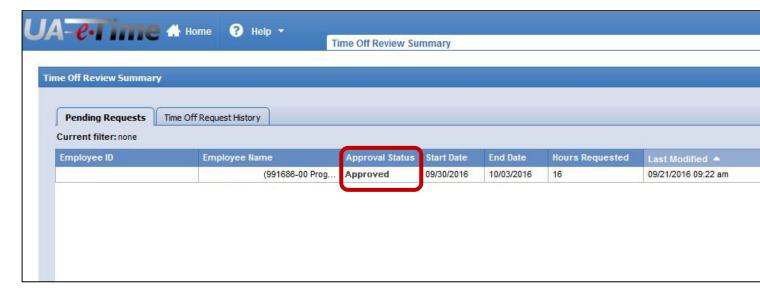
- 1. Exceptions shows if the request exceeds the leave balance
- 2. History shows the previous requests and approval status
- 3. Bank Usage shows available and prior usage

After reviewing the request, select an action to take:

- 4. Approve this Time Off Request
- 5. Reject this Time Off Request



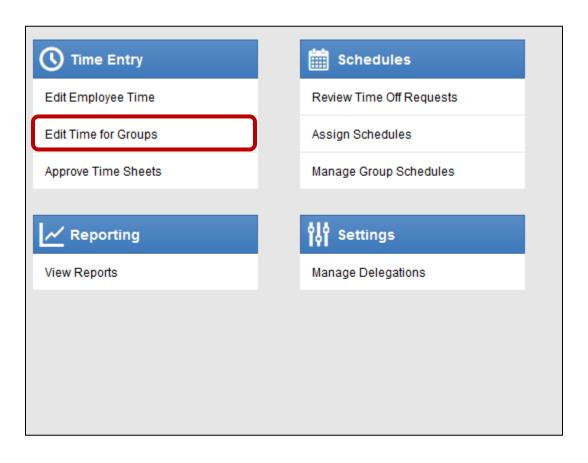
After the request is "Approved" or "Rejected" the request moves to Request History.



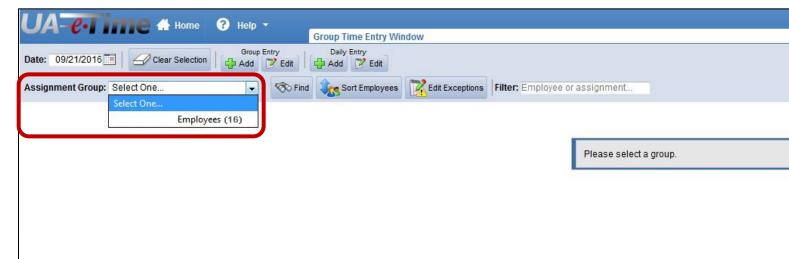
### **Edit Time for Groups**

The Group Time Entry screen allows managers to add and edit time for an entire group of employee assignments at one time. An example of this is Administrative Leave time for employees when the University suspends normal operations during the work day.

 To display the Group Time Entry screen select the Edit Time for Groups menu option on the Dashboard.



• The Group Time Entry Window will be displayed. Select the Assignment Group to work with from the drop down list.



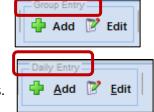
# **Employees in the Assignment Group**

From this window the options are:

Change the work week to review by entering any day in the work week or by clicking the calendar in the "Date " field.

Date: 11/29/2009 III

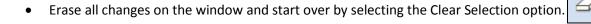
• Edit time for a group of employees from the Group Entry options.



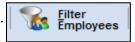
Clear

Selection

Edit by day for a group of employees from the Daily Entry options.



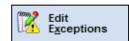
Retrieve a list of employees matching a specific set of criteria.



• Arrange the employees on the window in a specific order.

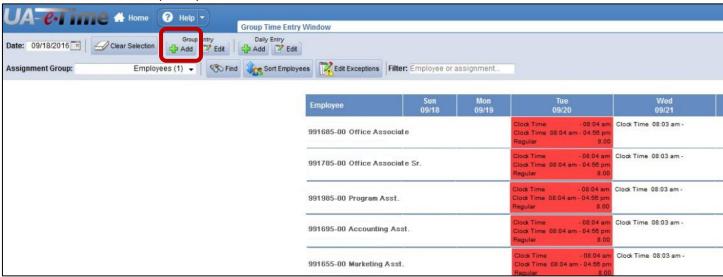


• Highlight days with entry exceptions for easy identification.

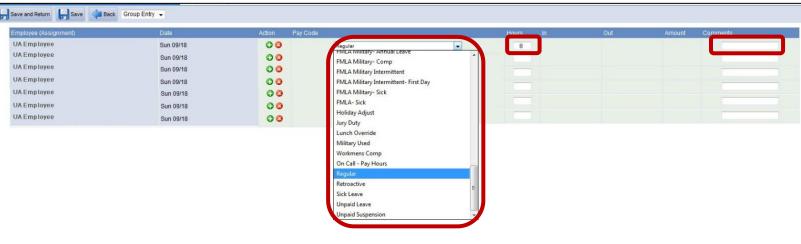


#### Add or Edit time for multiple days for a Group of Employees with a Single Entry

- 1. Select the days to edit by clicking in the days to update for each employee
- 2. Click the Group Entry Add or Edit button

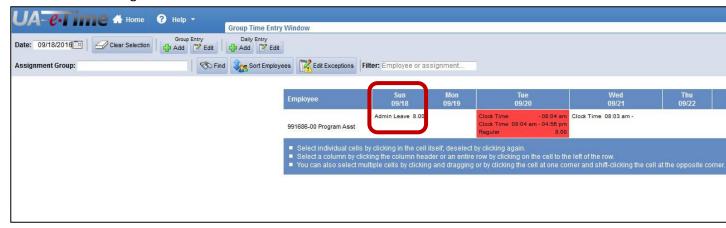


- 3. The employees and days to add time will be displayed.
- 4. Select the Pay Code to update from the drop down list and enter the time to pay. If Clock Time is selected enter the Time In and Time Out for the day. If a Benefit Hours pay code is selected enter the number of hours to pay for the day. Add any necessary comments.
- 5. Click the Save or Save and Return button to save your changes.



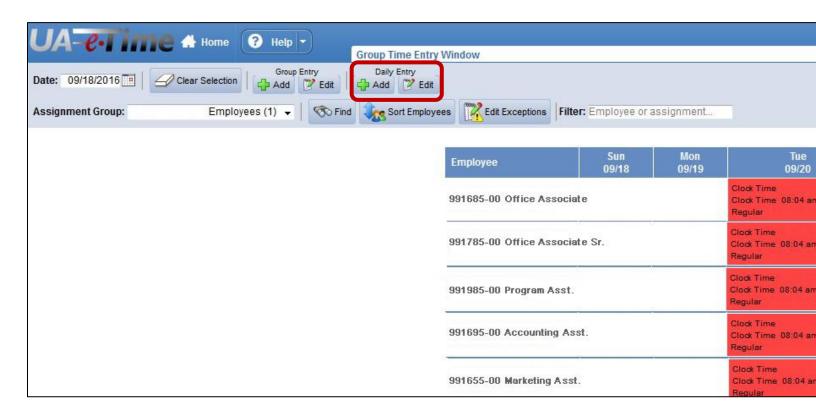
6. The changes will be recorded on the Group Time Entry window and on the employee's timesheet.

7. If Save and Return is selected you are returned to the employee list which will display the changes that were made to the timesheet.

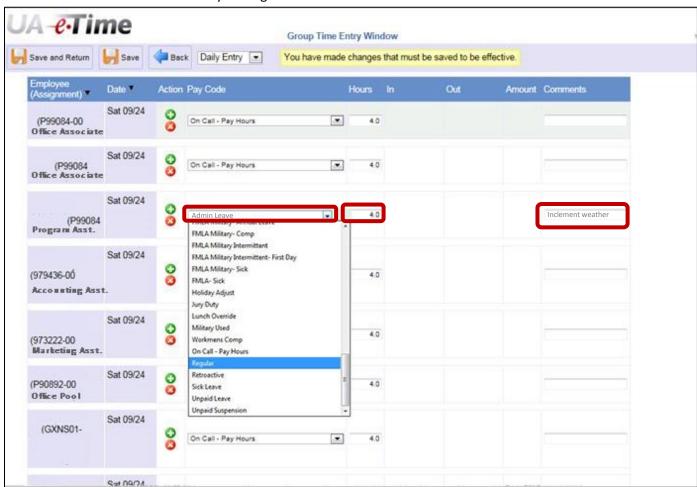


### Add or Edit time for multiple days for a Group of Employees by Day

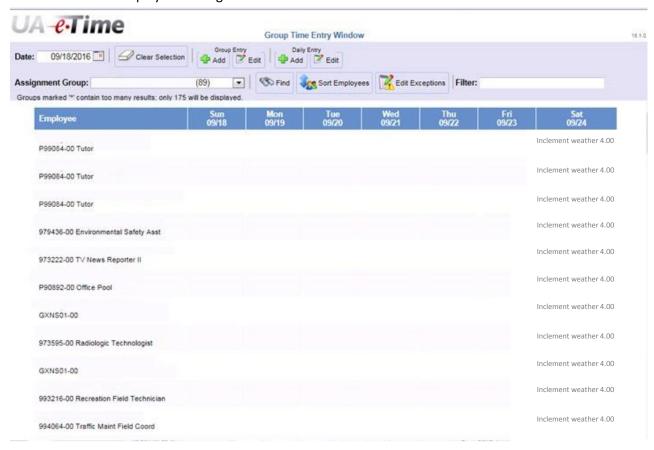
- 1. Select the days to edit by clicking in the days to update for each employee.
- 2. Click the Daily Entry Add or Edit button.
- 3. Selecting the Save Option will display the employees selected with the changes to their times. You have the opportunity to make any changes for exceptions.



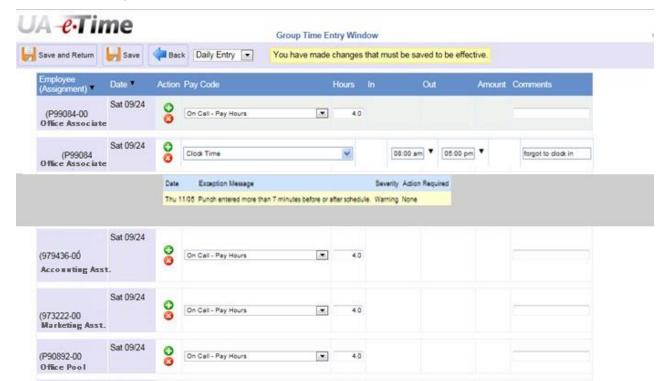
- 4. The employees and days to edit will be displayed.
- 5. For each employee and date listed, select the pay code from the drop down list, enter the time to be paid and comments if needed.
- 6. Click Save and Return or Save to save the changes and update the employee timesheets for the days changed.



7. If Save and Return is selected you are returned to the employee list which will display the changes that were made to the timesheets.



8. If Save is selected, this will display the employees selected with the changes to their times. You will have the opportunity to make any changes for exceptions.



### **Managing Schedules**

### **Maintain Employee Schedules**

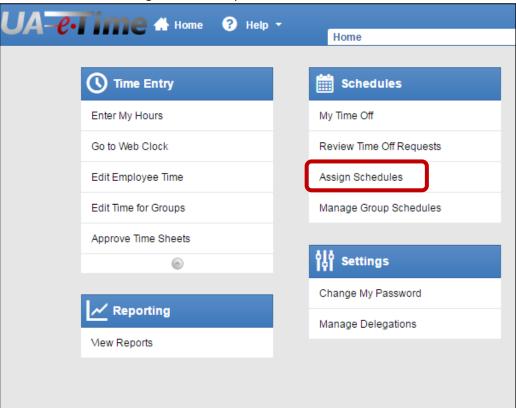
Schedules are used in the system to allow for comparison of actual time to scheduled time and aid in your work force management. They can also be used to aid in employee discipline by tracking tardy employees. Employees are not penalized if they do not clock in or out according to schedule.

Schedules should be assigned to regular full time and regular part time employees. Students, temporary and contingent on call employees do not require schedules. The system also uses schedules to identify employees who should be paid holiday pay when the University suspends normal operations for a holiday period and administrative leave when the University suspends normal operations for any other reason (inclement weather, power outages, and any other unscheduled closure).

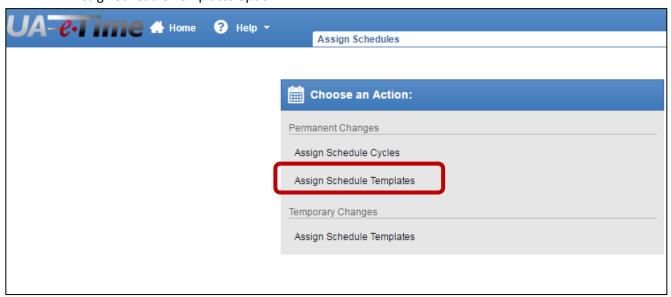
Schedule templates will initially be assigned to all employees in an organization based on the standard schedule selected by the department manager. However, employees can be assigned any schedule that is established in the system in order to properly cover your department. The system allows for schedule templates to be assigned on a permanent or temporary basis. Temporary schedules are valid only for a current pay period.

### Change an employee's permanent schedule

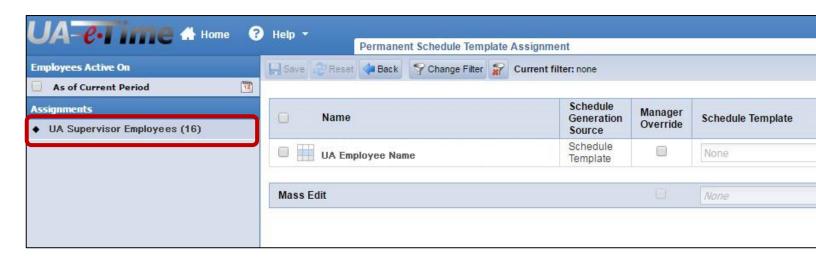
Select the Assign Schedules option from the Dashboard.



2. The Schedule Maintenance screen will be displayed. In the **Permanent Changes** section select the Assign Schedule Templates option.



3. Select the Assignment Group to update.



Help ▼ Schedule Change Filter Current filter: none Reset Back Schedule Manager Name Generation Schedule Template Override Source Schedule 173 Monday to Friday 8am to UA Employee Name Template Schedule Monday to Friday 8am to **UA Employee Name** Template Schedule Monday to Friday 8am to **UA Employee Name** Template Schedule Monday to Friday 8am t

4. This will display the employees in that assignment group with their current schedule template.

5. The schedule template change screen allows a manager or timekeeper to change the schedule for any employee displayed on the screen. If all employee schedules are to be changed to be the same, check the box at the top of the screen titled "Make the values for all assignments the same as the first one".

Template

#### To make a Permanent change to an employee's schedule:

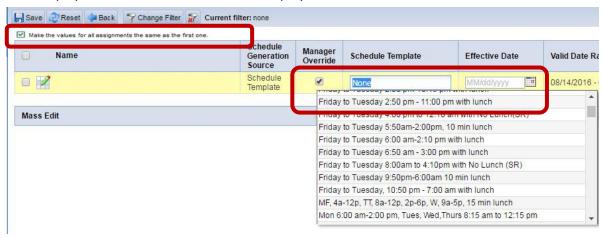
the option.

**UA Employee Name** 

- 1. Check the Manager Override box for the employee to be changed.
- 2. Select the Schedule Template from the dropdown box.
- 3. Enter the effective date of the change. The date of the change must be in the Valid Date Range column.
- 4. If all employee schedules are to be changed, check the box titled Make the values for all assignments the same as the first one.
- 5. Before saving the changes they can be reversed back to the original templates by clicking



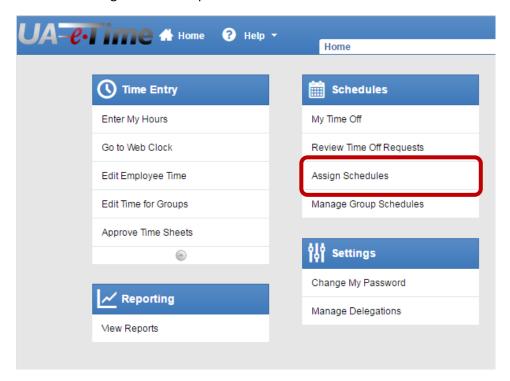
- <u>Save</u> to save the schedule template changes.
- 7. The schedules are effective for the current and future pay periods. The new schedule will be displayed in the Schedule Tab on the employee timesheet.



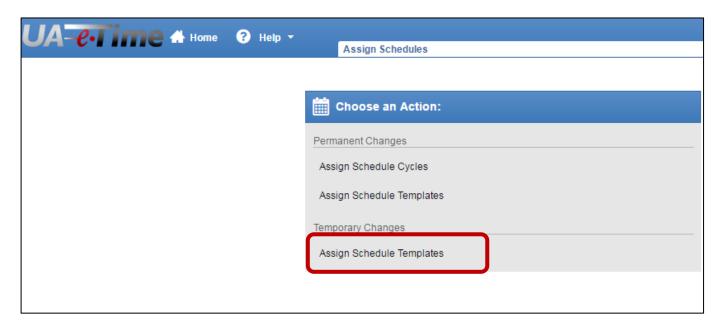
### Change an employee's schedule on a temporary basis for the current pay period

The process to make a temporary change to an employee's schedule for the current pay period is the same as making a permanent change, but temporary schedules are valid only for a current pay period.

1. Select the assign schedules option from the Dashboard



2. The Schedule Maintenance screen will be displayed. In the **Temporary Changes** section select the Assign Schedule Templates option.

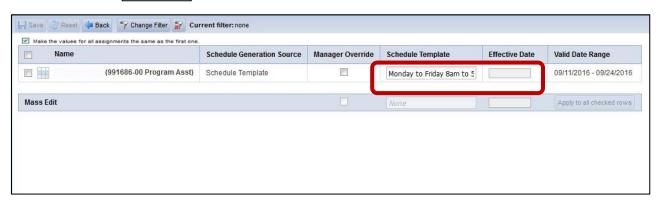


#### To make a Temporary change to an employee's schedule:

- 1. Select the Schedule Template from the dropdown box. Note: for temporary changes the Manager Override check box cannot be selected.
- 2. Enter the effective date of the change. The date of the change must be in the Valid Date Range column. Note: schedule will revert back to the employee's regular schedule at the end of the current pay period.
- 3. If the schedule for all employees is to be changed check the box titled "
  - Make the values for all assignments the same as the first one. "
- 4. Before saving the changes they can be reversed back to the original templates by clicking the



5. Click the save the schedule template changes.

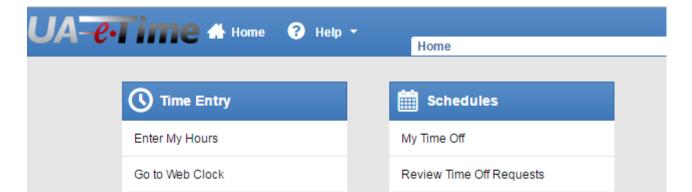


**Note**: schedule changes can also be made by clicking on Edit Employee Time and then on the Schedule Tab.

### **Manage Group Schedules**

The Manage Group Schedules option allows managers and timekeepers to edit schedules for an entire group of employee assignments at one time. This screen should be used for one-time schedule modifications and not for recurring or temporary changes.

1. To access the Group Schedule Window select the Manage Group Schedules option from the Dashboard.



2. Select the Assignment Group to work with from the drop down list.



The employees in that Assignment group scheduled in the current pay week will be displayed. From this window the options are:

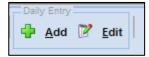
- Change the work week to review by entering any day in the work week or by clicking the calendar in the "Date" field.
- 2. Erase all changes on the window and start over by selecting the Clear Selection option.



3. Edit time for a group of employees from the Group Entry options.



4. Edit by day for a group of employees from the Daily Entry options.

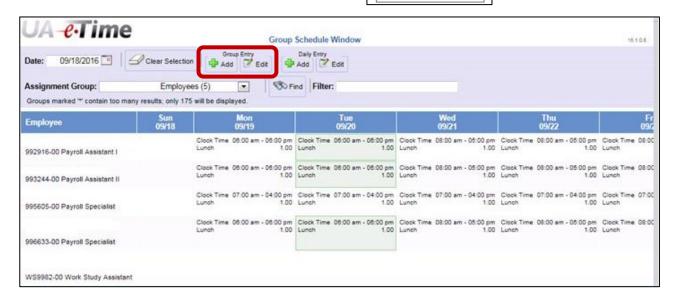


5. Retrieve a list of employees matching a specific set of criteria.





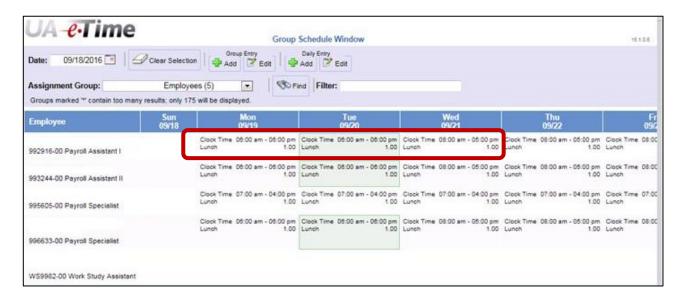
 To make a schedule change for a group of employees select the cells for which entries are to be changed and click the Edit in the Group Entry block.



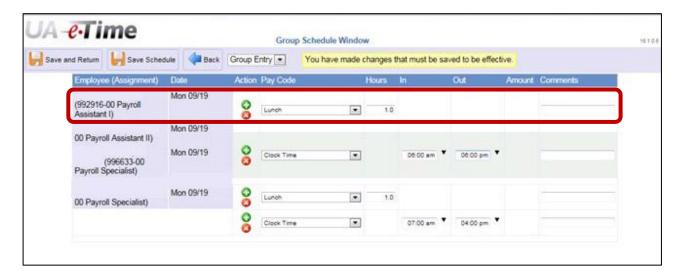
Make the changes to the schedule by entering the new In or Out time of day for the schedule.
 Select Save and Return or Save Schedule to make the changes effective.



The Save and Return saves the schedule changes on the Group Schedule window and updates the Schedule tab on the employee timesheet.



The Save Schedule option saves the schedule changes on the Group Schedule window and on the Schedule tab on the employee timesheet and returns a window that allows for the manager to make changes by exception. Enter changes to the In or Out times for a day for an employee and select Save and Return or Save Schedule to save the changes.

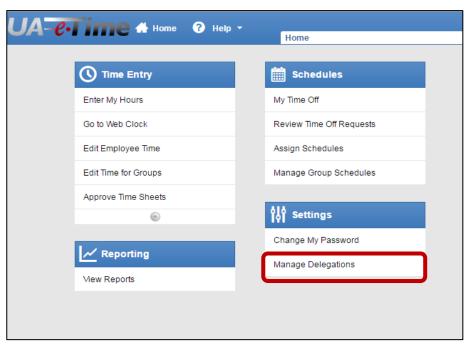


# **Manage Delegations**

Approval authority can be delegated to another user in eTime. This is helpful for times when the original Approver is not available to review and approve timesheets by the stated deadline.

### **Delegate Authority**

- 1. Log into UA-eTime.
- 2. From the Settings block click Manage Delegations.



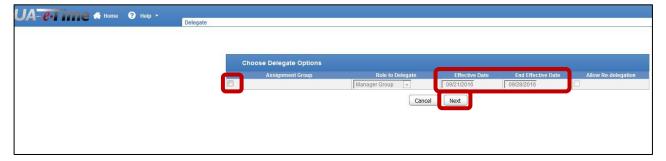
3. Click Delegate Authority.



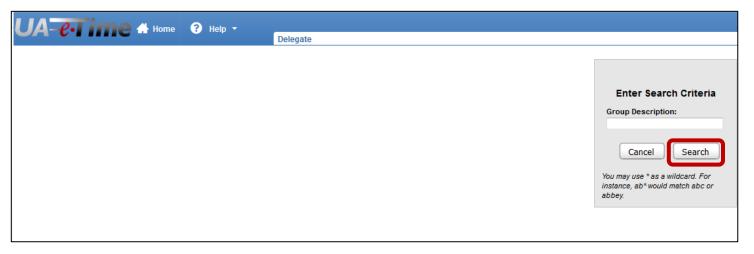
4. Click Search for a list of Assignment Groups.



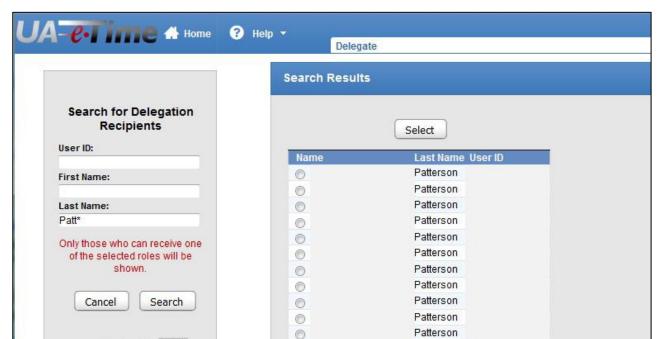
- 6. Click the check box next to the Assignment Group to Delegate.
- 7. Enter the Effective Date and End Effective Date for the delegation to be effective. The screen defaults the current date into Effective Date with the End Effective Date set to 1 week later. If the time period for the delegation is until further notice enter 01/01/2999 in the End Effective Date field.
- 8. Click Next.



5. Search for the person to receive the delegation. The person can be searched by any field in the Search for Delegation Recipients box. Click Search



6. Select the person to receive the delegation. Use the wild card "\*" to narrow the search. Click Select.

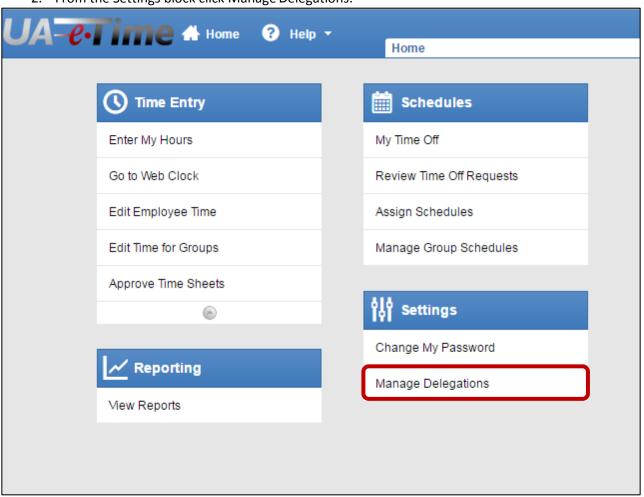


7. Delegation is complete.

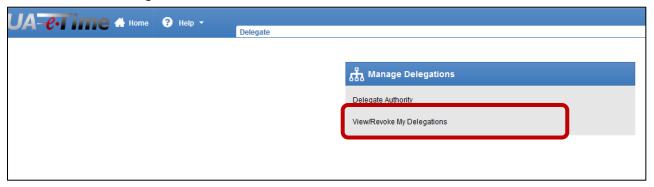


### **Revoke Delegation**

- 1. Log into UA-eTime.
- 2. From the Settings block click Manage Delegations.



3. Click View/Revoke Delegations.



4. All current and previous delegations will be listed. Inactive delegations will be "grayed out". Click Revoke All next to the delegation to be ended.



5. Select immediately or a specific date to end the delegations. Click Revoke Delegations.



6. Delegation has been revoked.

