

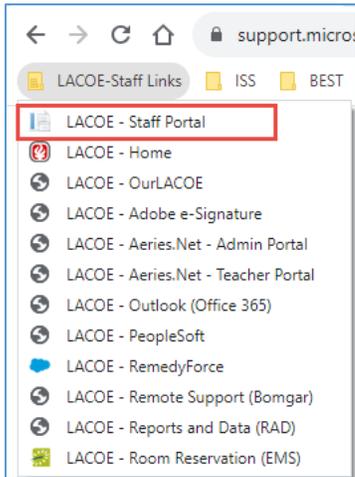
# UKG Ready Timekeeper/Time Manager Training Guide

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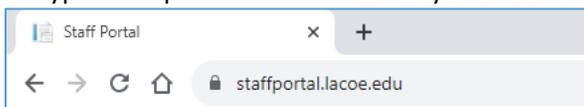
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# 1. Log into UKG Ready via LACOE Staff Portal

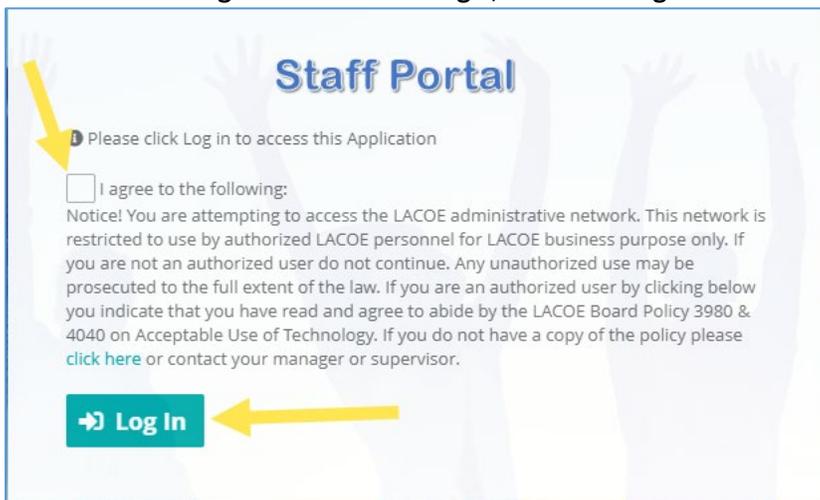
- a. Go to **LACOE Staff Portal Links** folder on your browser, and click on *LACOE- Staff Portal* link.



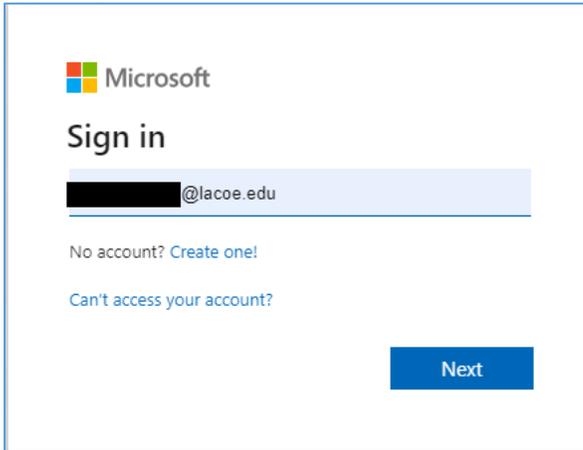
- b. Or type “staffportal.lacoe.edu” into your browser address box and press **Enter**.



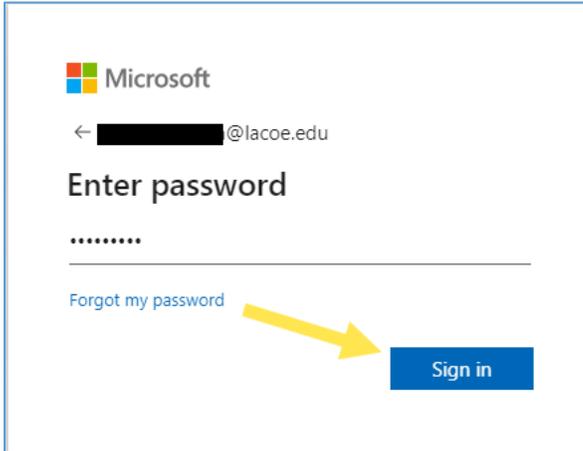
- c. Check the box “**I agree to the following:**”, then click **Log In** button.



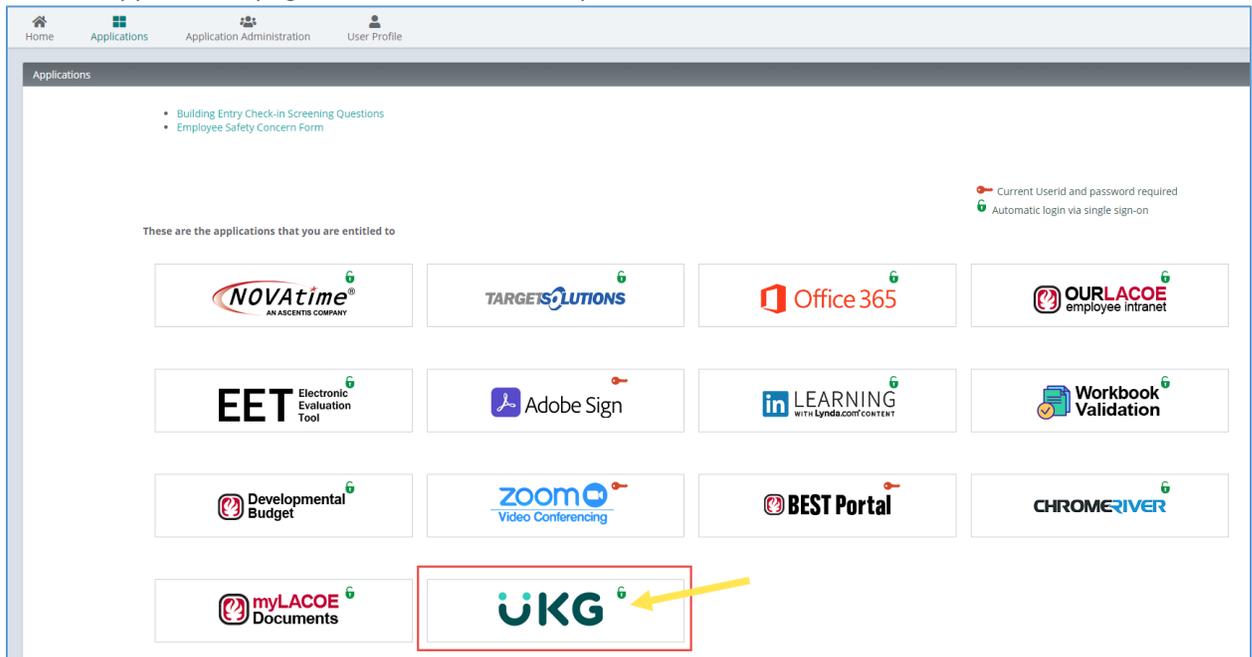
d. Type in your LACOE email.



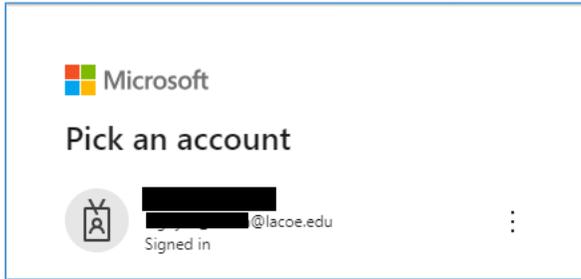
e. Enter your system password and click **Sign in** button.



f. The Applications page shows with UKG Ready tile on it

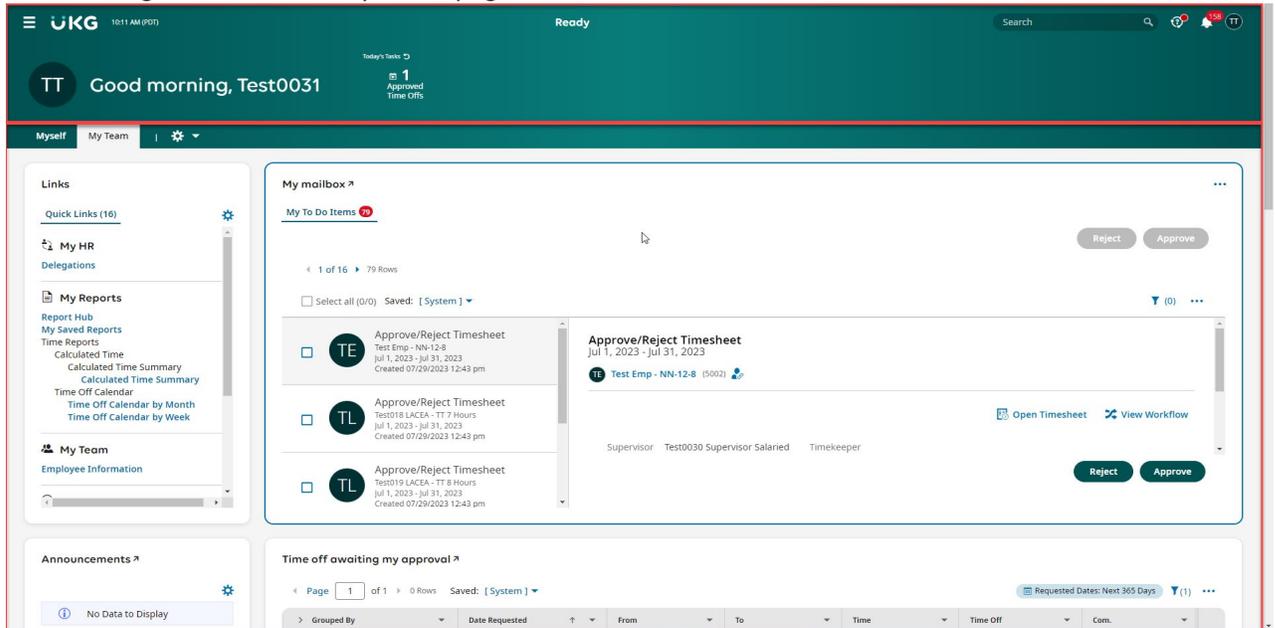


- g. Click on the tile and system will prompt you to pick an account. Choose the one with your LACOE email for confirmation, twice.



## 2. UKG Ready Home Page Review

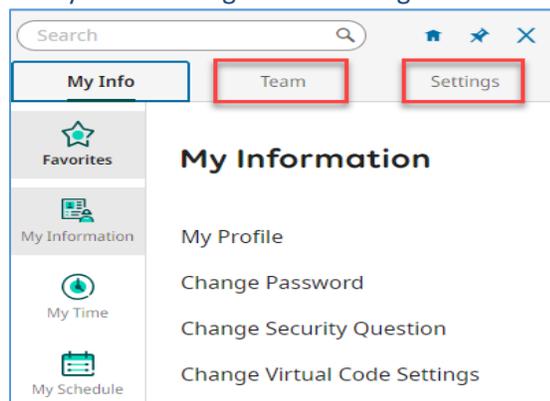
a. Once signed in, UKG Ready home page shows.



b. On top is the Header section with some clickable areas to take you to different places in the system and the Search box. Note: the Header section is available from all panels in the system.



- c. Click the three-stripe **Main** menu button  (also called hamburger menu button) will give you access to three tabs:
- My Info** tab – grant access to your own account information and some preset favorite pages
  - Team** tab (single person button) – provide access to your team members' account information, their accrual balances and their timesheet. It also has the Favorites tab to take you to some preset favorite pages/panels in the system.
  - Settings** tab – depends on your security access, you might have some access to system's configuration settings here.



- d. Clicking on the letters **UKG** in the Header section will take you back to the home page, from wherever you are in the system at that time.



- e. Clicking on the black circle with your initials within it **TT** on the left side of the Header section will take you to the **My Profile** page where you can view your own account information, your accrual balances, etc.

My Information > My Profile

← My Profile

**TT** Test0031 Timekeeper Salaried  
Employee ID: Test0031 | Hired Date: 01 Jan, 2021 (2 Years, 7 Months, 6 Days)

Single-Column View

Search Widget Names

Main

Jump to

Base Compensation

Current Compensation

Annual \$0.00 / 2080.00hrs Pay Period \$0.00 / 173.33hrs Hourly \$0.00

Page 1 of 1 - 1 - 1 of 1 Rows

Effective From	Annual \$	% Change	Amount \$	Hours	PP
12/31/1900	\$0.00		\$0.00 / Year	2080.00 hrs / Year	12

Personal Information

Test0031

Primary Email Secondary Email

Code Work Phone

United States (+1) -- Primary

Code Home Phone

United States (+1) -- Primary

Code Cell Phone

United States (+1) -- Primary

National ID

Primary National ID

Social Security Number 999-99-9999

Address

Address

USA

Separate Mailing Address

- f. But clicking on the similar but smaller button **TT** on the far right of the Header section will give you option to close the window or open a new window, besides the option to view your profile page.

UKG 09:44 AM (PDT) Ready

Search

Today's Tasks

**TT** Welcome back, Test0031

1 Approved Time Offs

Myself My Team

Links My mailbox

Test0031 Timekeeper Salaried

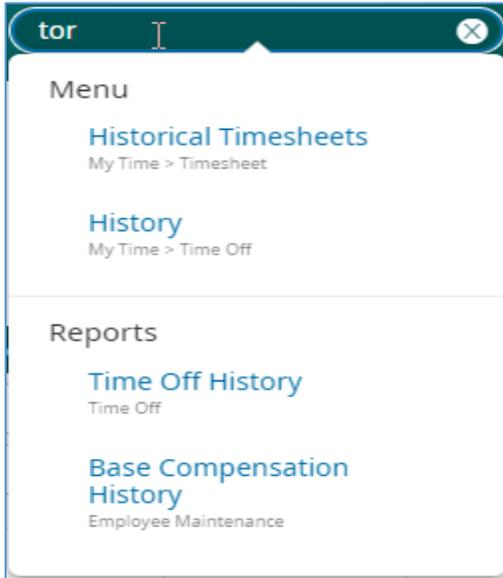
Employee ID: Test0031  
Hired Date: 01/01/2021 (2 Years, 7 Months, 13 Days)

Profile

Close Account View

New Window

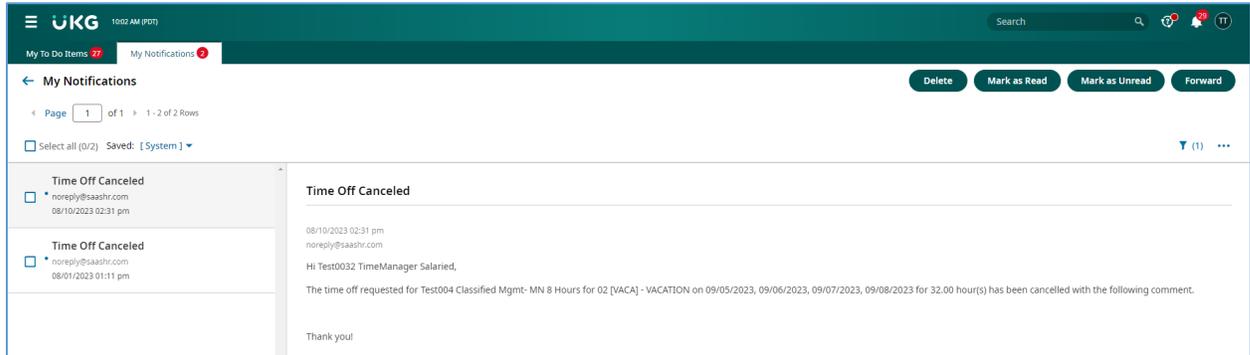
- g. You can use the **Search** box to search for a particular menu item or a report within the system. For example, I entered “tor” and the system returns the results below.



- h. Clicking on the bell button  at the far right will take you to your mailbox which has two tabs: **My To Do Items** and **My Notifications**. **My To Do Items** tab shows the timesheets from your staff pending your approval.

Supervisor	Timekeeper
Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried

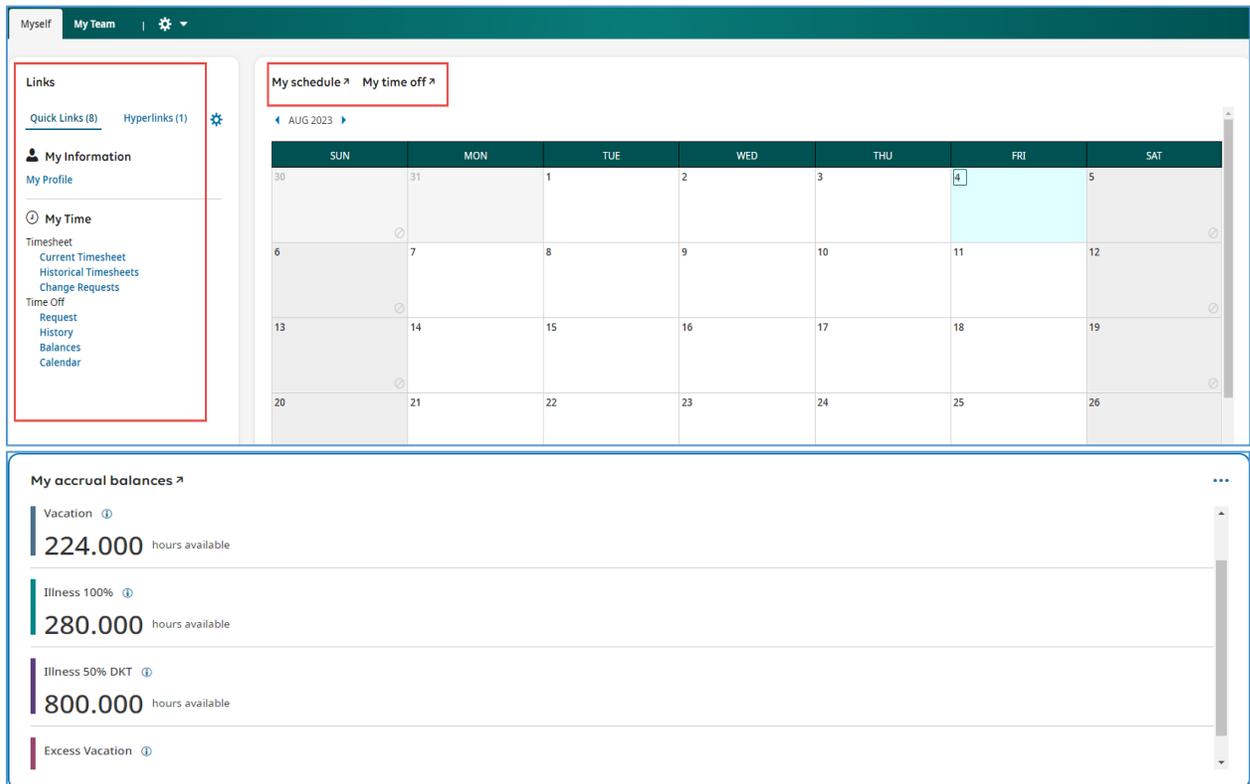
- i. **My Notifications** tab shows messages generated by the system when time off and time change requests, or timesheets are submitted by your staff. You have the options to *Delete*, *Mark as Read*, *Mark as Unread*, and *Forward* the messages.

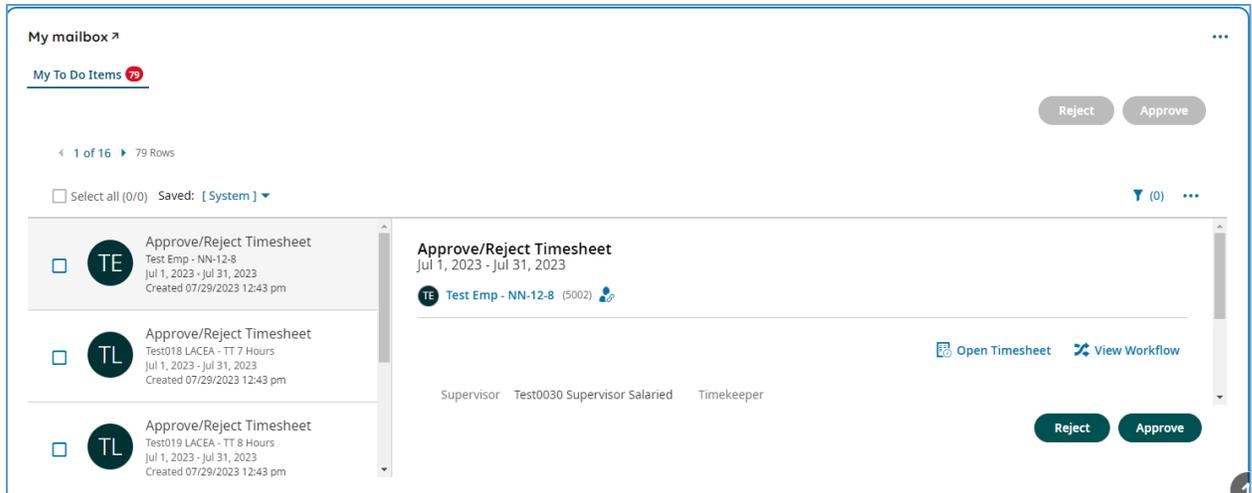


- j. Under the Header section you will find **Myself**, **My Team**, and **Edit** tabs.

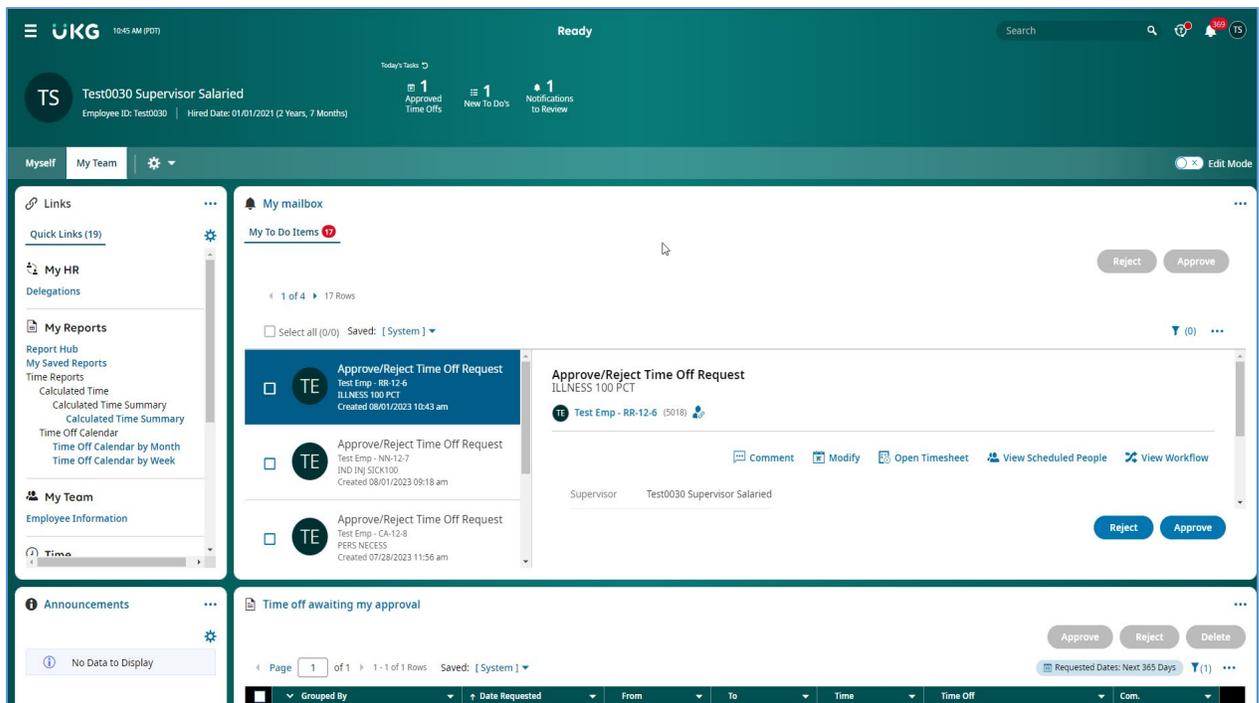


- k. Under **Myself** tab, you can access your personal account information, view your current pay period calendar, create or view history of time off requests, and view your accrual balances via the various widgets: **Quick Links/Hyperlinks**, **My Schedule / My time off**, **My accrual balance**, and **My mailbox**.

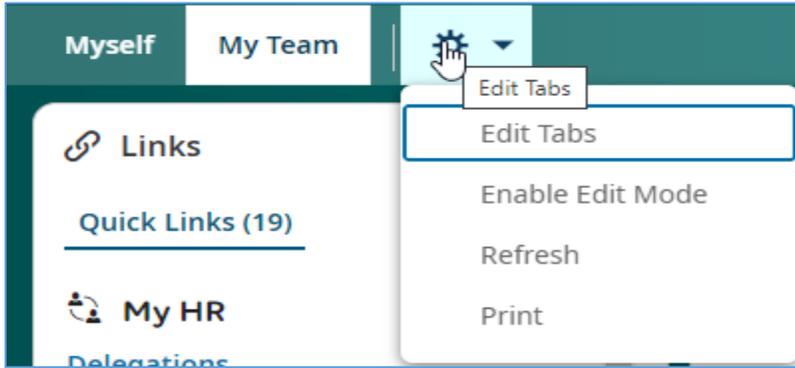




- I. **My Team** tab gives you access to your staff's account information, leave balances, timesheet, and time off requests through various predefined widgets: **Quick Links/Hyperlinks, My mailbox, Times off awaiting my approval, My team, Announcements, and My saved reports.**



m. And **Edit** tab allows you to make some updates to the tabs shown on the home page.

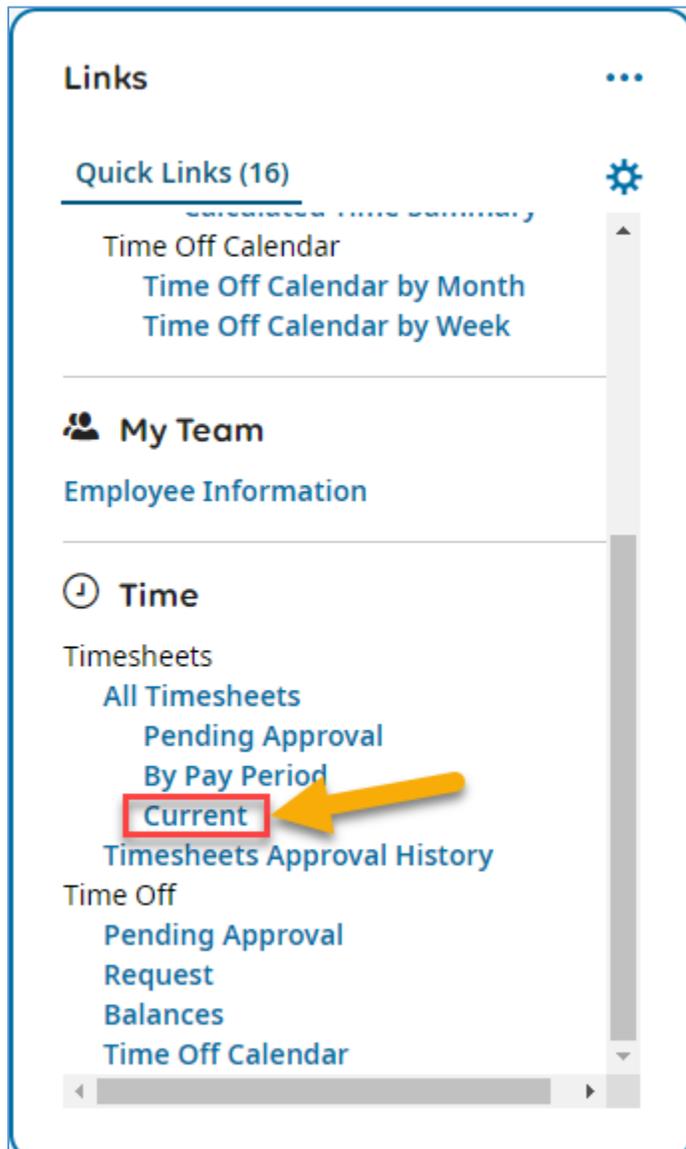


### 3. Preview a Staff's Timesheet

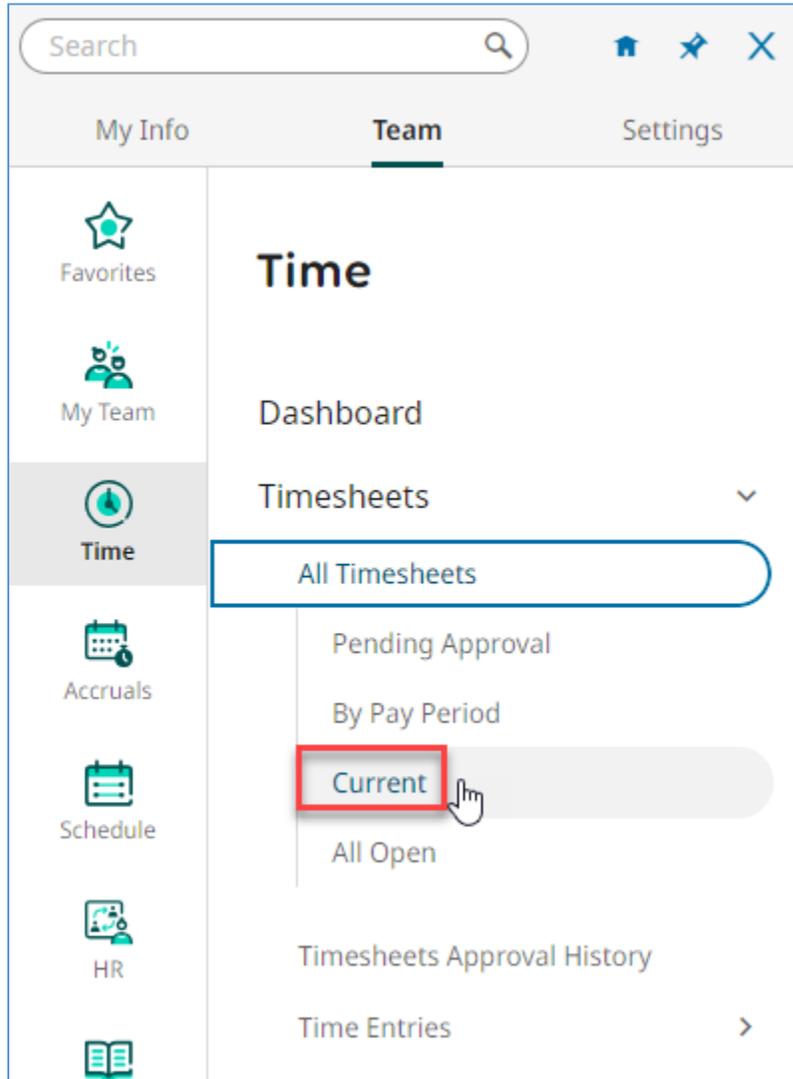
- a. On the Dashboard, click on **My Team** tab.



- b. Scroll down the **Quick Links** widget on the left of the page, click on *Current* link in the **Time** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Current* link under the **Timesheets** section.



- d. The **Timesheets (Current)** page shows the current pay period timesheet for the employees assigned to you. It might have multiple pages.

Time > Timesheets

← Timesheets (Current) View Submit Approve Reject ...

← Page 1 of 2 1 - 20 of 29 Rows Current view Date: 08/07/2023 (1) ...

	Permission	Approval State	Employee Id	First Name	Last Name	Raw Hours	# Records	# Unapproved Time Entries	Timesheet Start	Timesheet End
<input type="checkbox"/>	=	=	starts with	starts with	starts with	=	=	=	=	=
<input type="checkbox"/>	Approve	Open	5001	Test	Emp - MN-12-8	16.00	2	2	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	5002	Test	Emp - NN-12-8	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	5004	Test	Emp - RR-12-8	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test003	Test003	Classified Management - MM Exempt	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test004	Test004	Classified Mgmt- MN 8 Hours	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test005	Test005	Confidential - CA 8 Hours	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test006	Test006	CSEA - ER 4.5 Hours	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test007	Test007	CSEA - ER 5 Hours	-	-	-	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	Test008	Test008	CSEA - ER 5.5 Hours	-	-	-	08/01/2023	08/31/2023

e. Click the **Preview Timesheet** button for a particular employee.

Permission	Approval	Employee	First Name	Last Name	Raw Hours	# Records	# Unappr.	Timesheet	Timesheet	Default P.	Employee	In Payroll
Approve	Open	5001	Test	Emp - MN-12-8	16.00	2	2	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	5002	Test	Emp - MN-12-8	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	5004	Test	Emp - RR-12-8	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test003	Test003	Classified Management - MM Ex empt.	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test004	Test004	Classified Mgmt - MN 8 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test005	Test005	Confidential - C A 8 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test006	Test006	CSEA - ER 4.5 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test007	Test007	CSEA - ER 5 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test008	Test008	CSEA - ER 5.5 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test009	Test009	CSEA - ER 6 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test010	Test010	CSEA - ER 6.5 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test011	Test011	CSEA - RR 5 Hours	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No
Approve	Open	Test012	Test012	CSEA -	-	-	-	08/01/2023	08/31/2023		Not In Payroll	No

f. For an exception (monthly) employee, the **Preview Timesheet** page will only show the days the employee has time off or extra worked hours reported. These are considered exceptions to the normal schedule.

Date	Hours	Break	# Entries	Time Off Name	Position	TRL	Activities
07/03/2023	2.50	-	1	POSS IND INJURY			
07/04/2023	8.00	-	1	POSS IND INJ 50			
07/05/2023	8.00	-	1	POSS IND INJ VC			
07/10/2023	2.00	-	1				Comp Time
07/11/2023	8.50	-	1	NON DUTY DAY TT			
07/12/2023	4.00	-	1	INDUST INJURY			
07/13/2023	4.00	-	1	INDUST INJURY			
07/14/2023	4.00	-	1	INDUST INJURY			
07/17/2023	8.00	-	1	PERS NECESS			
07/18/2023	8.00	-	1	PERS NECESS			
07/19/2023	8.00	-	1	PERS DISCRETION			
07/20/2023	8.00	-	1	PERS DISCRETION			
07/24/2023	4.00	-	1	ILLNESS 100 PCT			
07/25/2023	4.00	-	1	ILLNESS 100 PCT			
07/26/2023	8.00	-	1	ILLNESS 100 PCT			
07/31/2023	8.00	-	1	ILLNESS AB109			
<b>Report Total</b>	<b>97.00</b>		<b>16</b>				

- g. For a positive reporting (hourly) employee, the **Preview Timesheet** page will show the days the employee worked or took time off during the pay period.

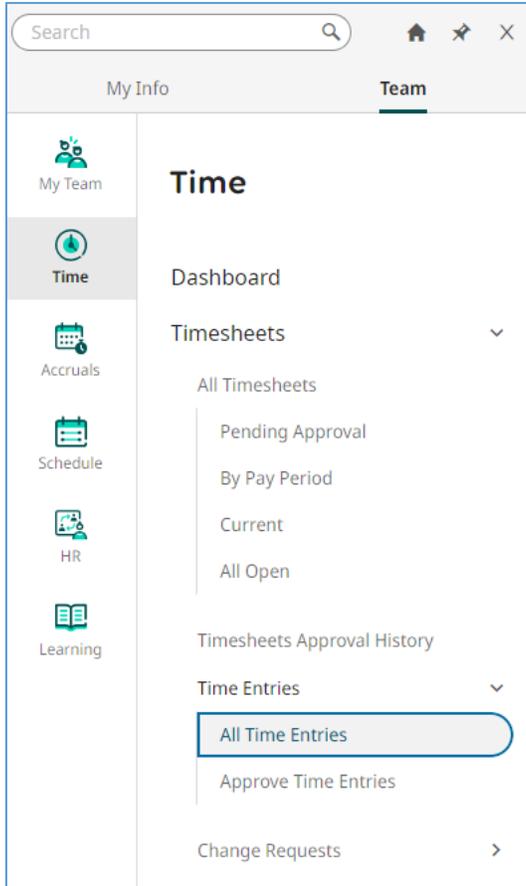
Preview Timesheet - [Hourly Monthly EE Nonexempt Test015 (Default)]

Page 1 of 1 1 - 19 of 19 Rows Saved: [System]

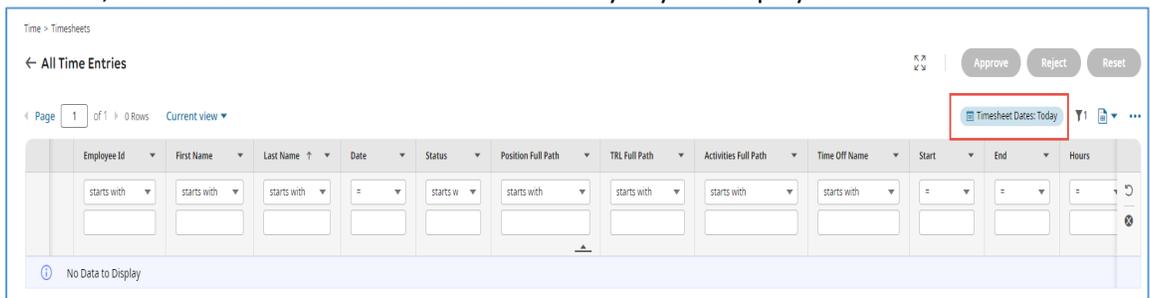
Date	Hours	Break	# Entries	Time Off Name	Position	TRL	Activities
	=	=	=		starts with	starts with	starts with
07/01/2023	8.50	-	2				
07/02/2023	8.50	-	2				
07/03/2023	8.00	-	2				
07/04/2023	8.50	-	2				
07/04/2023	8.00	-	1	HOLIDAY			
07/05/2023	8.00	-	2				
07/06/2023	4.00	-	1				
07/07/2023	5.00	-	1				
07/07/2023	4.00	-	1	ILLNESS 100 PCT			
07/09/2023	8.50	-	2				
07/10/2023	8.50	-	2				
07/11/2023	8.00	-	2				
07/12/2023	8.00	-	2				
07/14/2023	5.00	-	1				
07/14/2023	4.00	-	1	ILLNESS 100 PCT			
07/15/2023	8.50	-	2				
07/17/2023	3.00	-	1	ILLNESS 100 PCT			Call Back
07/18/2023	3.00	-	1				Call Back
07/18/2023	8.00	-	1	ILLNESS 100 PCT			
<b>Report Total</b>	<b>127.00</b>		<b>29</b>				

## 4. View Your Team's Timesheet Entries

- a. From the **Main** menu , in the **Team** tab, click on *All Time Entries* link under the **Time Entries** section.



- b. **All Time Entries** page shows. It might be blank because the defaulted view of “Today” is selected, and there are no timesheet entries for any of your employees.



- c. Click on filter button (the funnel), and change the option to “This Month.”

The screenshot shows the Timesheet interface with a filter button (funnel icon) circled in red. A yellow arrow points to this button. To the right, the 'Filters' dialog box is open, showing the 'Column' tab. Under 'Timesheet Dates', the 'Type' is set to 'Calendar Range' and the 'Date Range' is set to 'Today'. The 'Today' dropdown menu is expanded, showing options like 'Today', 'This Week', 'This Month' (highlighted in blue), 'This Year', 'This Quarter', and 'Past' options.

- d. Click **Apply** button.

The screenshot shows two buttons: 'Cancel' and 'Apply'. A yellow arrow points to the 'Apply' button.

- e. The page will then show the existing entries on your employees' timesheet for this month.

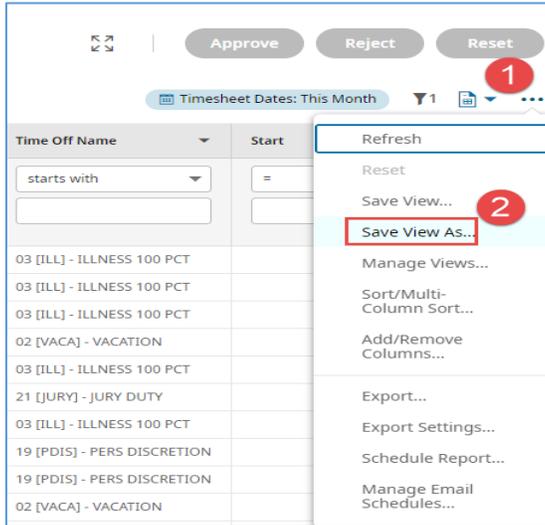
Time > Timesheets

← All Time Entries Approve Reject Reset

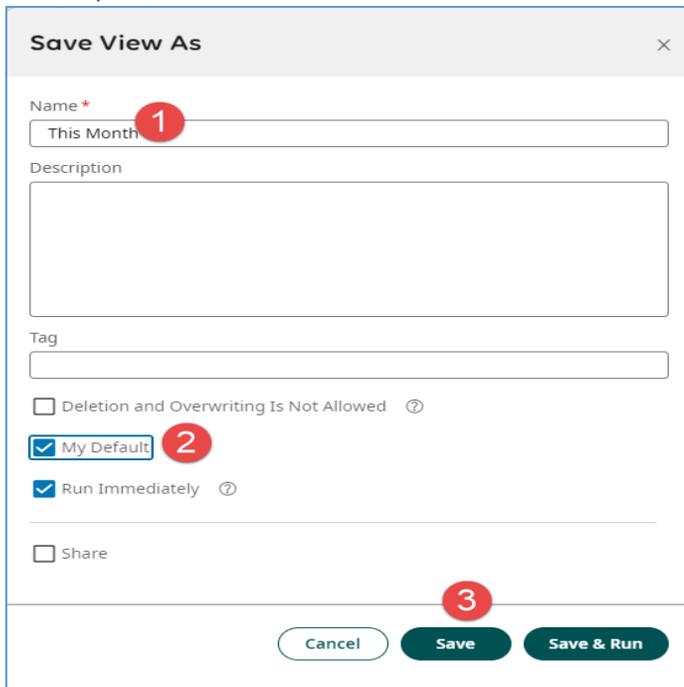
Page 1 of 2 1 - 15 of 16 Rows Current view Timesheet Dates: This Month Filter

	Employee Id	First Name	Last Name	Date	Status	Position Full Path	TRL Full Path	Activities Full Path	Time Off Name	Start	End
	starts with	starts with	starts with	=	starts w	starts with	starts with	starts with	starts with	=	=
<input type="checkbox"/>	Test003	Test003	Classified Management - MM Exempt	10/16/2023	New				03 [ILL] - ILLNESS 100 PCT	08:00a	1
<input type="checkbox"/>	Test003	Test003	Classified Management - MM Exempt	10/16/2023	New				03 [ILL] - ILLNESS 100 PCT	-	
<input type="checkbox"/>	Test003	Test003	Classified Management - MM Exempt	10/20/2023	New				03 [ILL] - ILLNESS 100 PCT	01:00p	0
<input type="checkbox"/>	Test003	Test003	Classified Management - MM Exempt	10/20/2023	New				02 [VACA] - VACATION	08:00a	1
<input type="checkbox"/>	Test005	Test005	Confidential - CA 8 Hours	10/16/2023	New				03 [ILL] - ILLNESS 100 PCT	08:00a	1
<input type="checkbox"/>	Test005	Test005	Confidential - CA 8 Hours	10/23/2023	New				21 [JURY] - JURY DUTY	-	
<input type="checkbox"/>	5000	Test	Emp - MM-12-8	10/02/2023	New				03 [ILL] - ILLNESS 100 PCT	08:00a	0
<input type="checkbox"/>	5000	Test	Emp - MM-12-8	10/04/2023	New				19 [PODS] - PERS DISCRETION	-	
<input type="checkbox"/>	5000	Test	Emp - MM-12-8	10/05/2023	New				19 [PODS] - PERS DISCRETION	-	
<input type="checkbox"/>	5001	Test	Emp - MN-12-8	10/10/2023	New				02 [VACA] - VACATION	08:00a	0

- f. To save this view for your future use, click on the **Actions (...)** button, and select *Save View As* option.



- g. Give it a name, check the **My Default** box, and click **Save** button. Next time you open this view/report, it will show the data for the whole month.

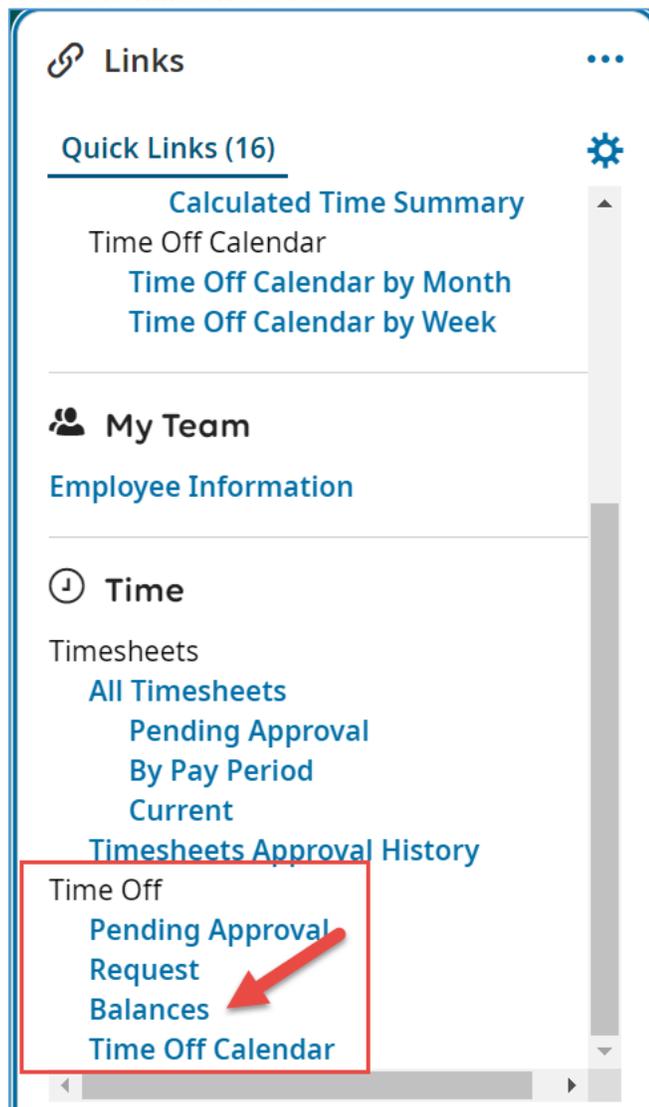


## 5. View an Employee's Accrual Balances

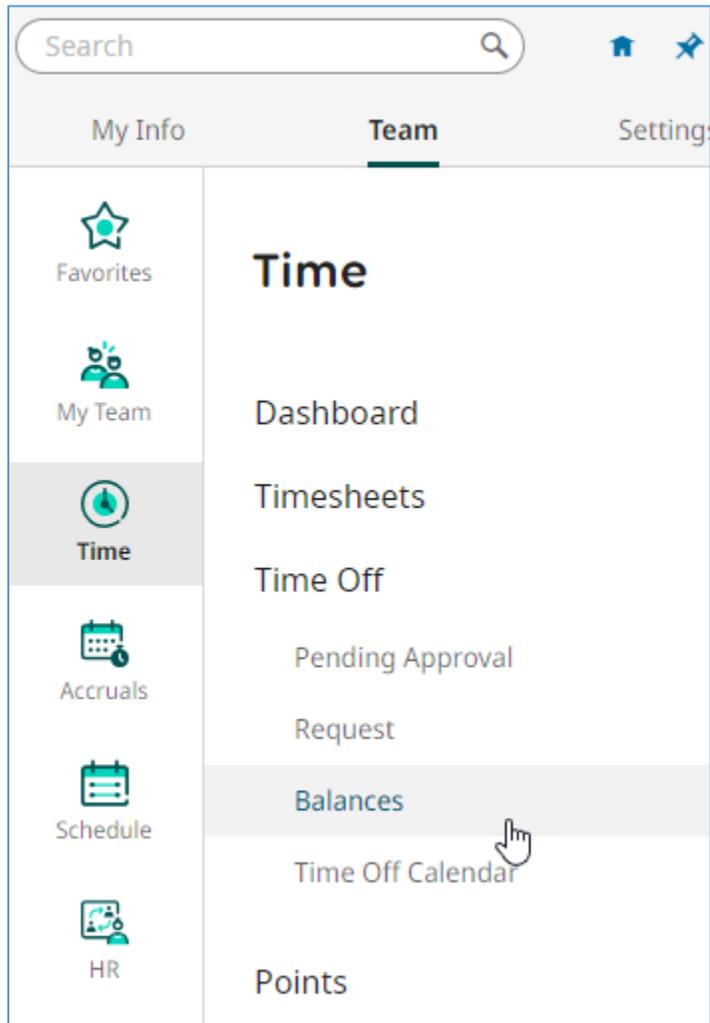
- a. On the Dashboard, click on **My Team** tab.



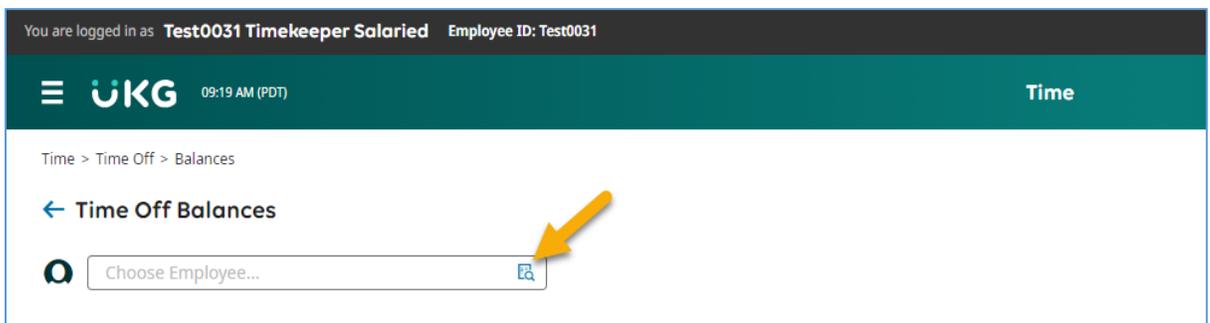
- b. From the **Quick Links** widget on the left of the page, scroll down and click on *Balances* link under the **Time Off** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Balances* link under the **Time Off** section.



- d. Click on the *Browse* button in the **Choose Employee** box to select the employee you want to view accrual balances.



UKG 10:39 AM (PDT) Browse and Select Employee

Time > Time Off > Balances

← Time Off Balances

Choose Employee...

Page 1 of 2 1 - 15 of 29 Rows Saved: [System]

Employee Id	Username	First Name	Last Name	Employee Status	In Payroll	Locked
starts with	=	starts with	starts with	Terminated	All	All
<input type="radio"/>	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	Not In Payroll	No	No
<input type="radio"/>	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	Not In Payroll	No	No
<input type="radio"/>	Test003	Test003	Classified Management - MM Exempt	Not In Payroll	No	No
<input type="radio"/>	Test004	Test004	Classified Mgmt- MN 8 Hours	Not In Payroll	No	No
<input type="radio"/>	Test005	Test005	Confidential - CA 8 Hours	Not In Payroll	No	No
<input type="radio"/>	Test006	Test006	CSEA - ER 4.5 Hours	Not In Payroll	No	No
<input type="radio"/>	Test007	Test007	CSEA - ER 5 Hours	Not In Payroll	No	No
<input type="radio"/>	Test008	Test008	CSEA - ER 5.5 Hours	Not In Payroll	No	No
<input type="radio"/>	Test009	Test009	CSEA - ER 6 Hours	Not In Payroll	No	No
<input type="radio"/>	Test010	Test010	CSEA - ER 6.5 Hours	Not In Payroll	No	No
<input type="radio"/>	Test011	Test011	CSEA-RR 5 Hours	Not In Payroll	No	No
<input type="radio"/>	Test012	Test012	CSEA-RR 6 Hours	Not In Payroll	No	No
<input type="radio"/>	Test013	Test013	CSEA-RR 7 Hours	Not In Payroll	No	No
<input type="radio"/>	Test014	Test014	CSEA-RR 8 Hours	Not In Payroll	No	No
<input type="radio"/>	5001	5001B	Test	Emp - MN-12-8	No	No

e. The balances for all the leave accrual buckets of the selected employee show.

Time > Time Off > Balances

← Time Off Balances

TC Test005 Confidential - CA 8 Hours

Vacation		Illness 100%		Illness 50% DKT	
current <b>5.500</b> hours		current <b>259.500</b> hours		current <b>800.000</b> hours	
Current Accrued	26.500 hrs	Current Accrued	285.500 hrs	Current Accrued	800.000 hrs
Projected Accrued	26.500 hrs	Projected Accrued	285.500 hrs	Projected Accrued	800.000 hrs
Current Balance	5.500 hrs	Current Balance	259.500 hrs	Current Balance	800.000 hrs
Projected Balance	5.500 hrs	Projected Balance	259.500 hrs	Projected Balance	800.000 hrs
Taken	21.000 hrs	Taken	26.000 hrs	Taken	0.000 hrs
Scheduled	0.000 hrs	Scheduled	0.000 hrs	Scheduled	0.000 hrs
Requested	0.000 hrs	Requested	0.000 hrs	Requested	0.000 hrs
Previous Carry Over	26.500 hrs	Previous Carry Over	189.500 hrs	Previous Carry Over	0.000 hrs
Request		Request		Request	

Personal Necessity		Personal Discretionary		Illness AB109	
current <b>32.000</b> hours		current <b>16.000</b> hours		current <b>48.000</b> hours	
Current Accrued	56.000 hrs	Current Accrued	16.000 hrs	Current Accrued	48.000 hrs
Projected Accrued	56.000 hrs	Projected Accrued	16.000 hrs	Projected Accrued	48.000 hrs

- f. Click on the highlighted links like **Taken** to see the history of all the usage for a particular leave type.

**Taken Hours - Vacation** ✕

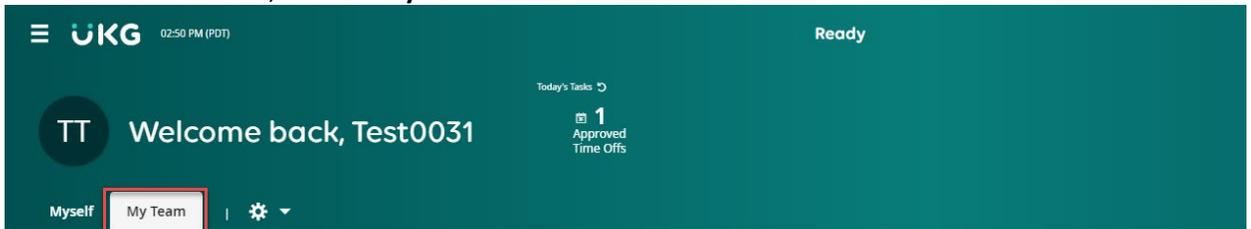
Page 1 of 1 | 1 - 3 of 3 Rows | Saved: [ System ] ▼(0) ...

Date	Weekday	Hours	Time Off
=	starts with		starts with
07/06/2023	Thursday	4.000	VACATION
07/10/2023	Monday	8.000	VACATION
07/20/2023	Thursday	8.000	VACATION
<b>Page Total</b>			20.00

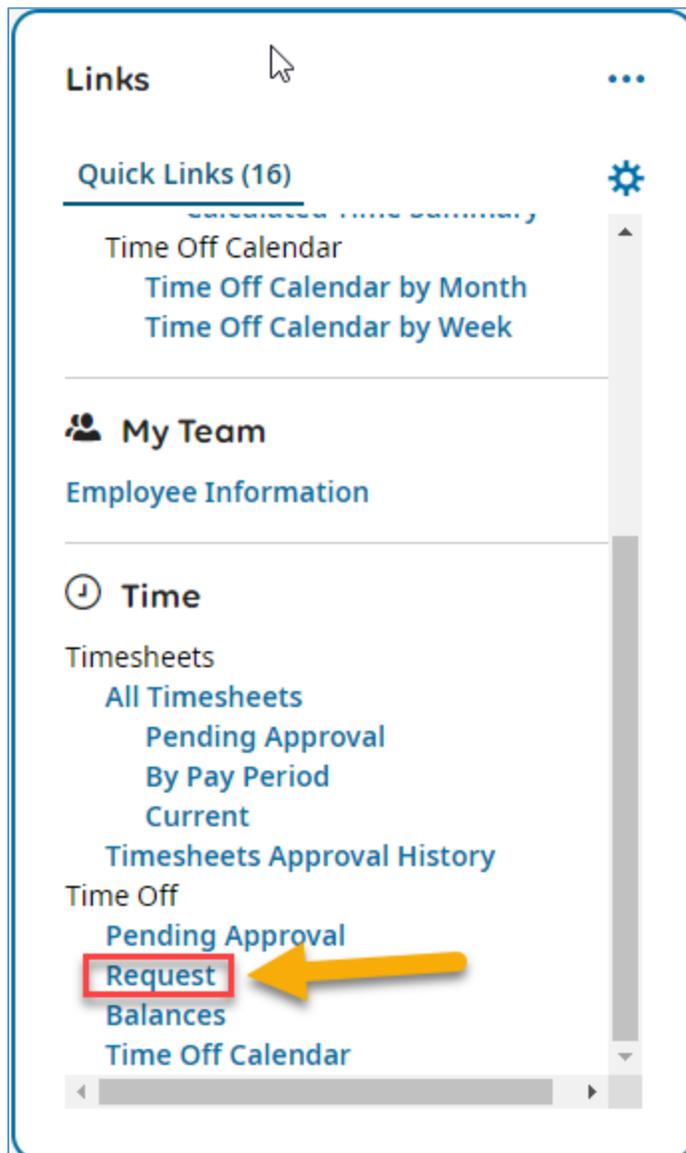
## 6. Create a Time Off Request on behalf of an Employee

**Note:** for teachers and para-educators, their time off requests should be created and approved in Red Rover, not in UKG Ready.

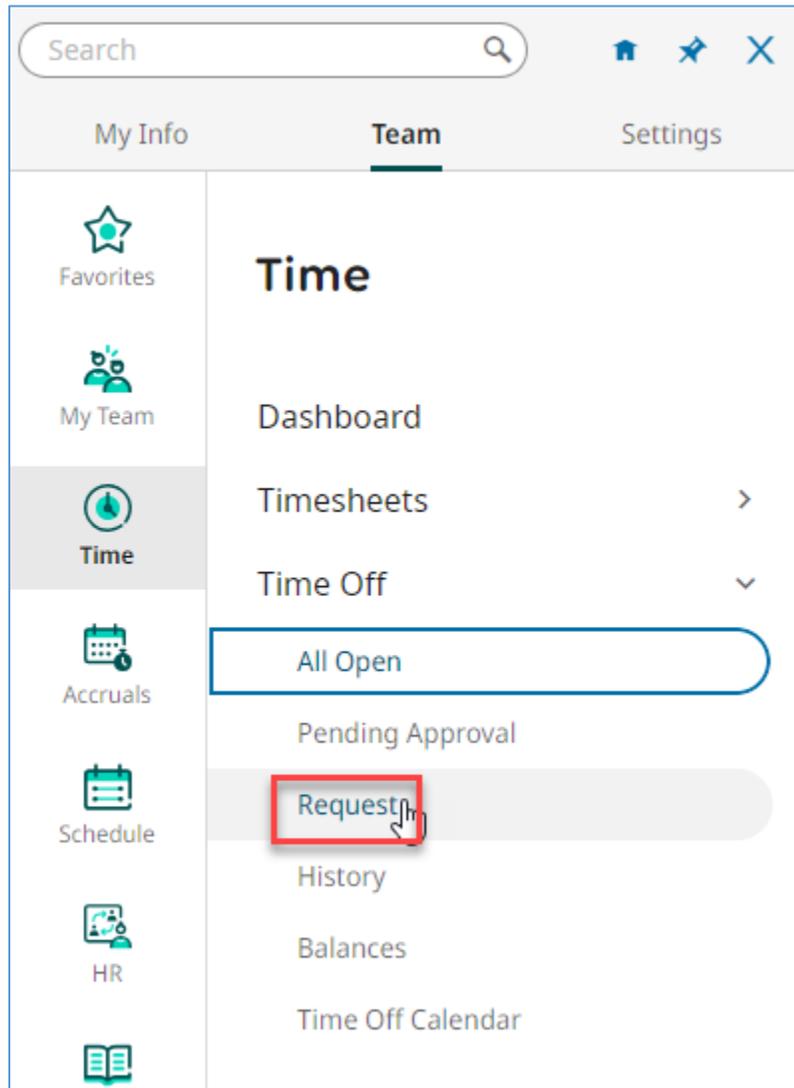
- a. On the Dashboard, click on **My Team** tab.



- b. Scroll down the **Quick Links** widget on the left of the page, click *Request* link under the **Time Off** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Request* link under the **Time Off** section.



- d. Click the *Browse* button from the **Employee** drop-box.



e. Select an employee from the **Employee Lookup** list

Employee Lookup

Page 1 of 3 | 1 - 15 of 32 Rows | Saved: [System]

Employee Id	Username	First Name	Last Name	Employee Status	In Payroll	Locked
starts with	=	starts with	starts with	!=	All	All
Test001	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	Not In Payroll	No	No
Test002	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	Not In Payroll	No	No
Test003	Test003	Test003	Classified Management - MM Exempt	Not In Payroll	No	No
Test004	Test004	Test004	Classified Mgmt- MN 8 Hours	Not In Payroll	No	No
Test005	Test005	Test005	Confidential - CA 8 Hours	Not In Payroll	No	No
Test006	Test006	Test006	CSEA - ER 4.5 Hours	Not In Payroll	No	No

f. Click the **Browse** button from the **Time Off Type** drop-box.

Time > Time Off > Request

← Time Off Request

Employee \*  
 TE Test Emp - RR-12-8

Time Off Type  
 Choose...

g. Select the time off type like Illness 100%, Vacation, etc. from the **Browse and Select** list. The list might have two pages, so you will need to go to page 2 for a leave type that is not on the first page.

Time Off Type

Choose...

Browse and Select

Page 1 of 2 | 1 - 20 of 23 Rows

Name	Full Path
ASSOCIATION	ASSOCIATION
BEREAVEMENT	BEREAVEMENT
CATASTROPHIC LV	CATASTROPHIC LV
COMP TAKEN	COMP TIME EARNED/COMP TAKEN
EXCESS SICK LV	EXCESS SICK LV
EXCESS VAC LV	EXCESS VAC LV
ILLNESS 100 PCT	ILLNESS 100 PCT
ILLNESS 50 DKT	ILLNESS 50 DKT
ILLNESS AB109	ILLNESS 100 PCT/ILLNESS AB109
ILLNESS MTRNTY	ILLNESS 100 PCT/ILLNESS MTRNTY

Close

h. Click **Start Request** button.



i. The Request Time Off box appears. Enter the information for the time off request like *Request Type*, *Date*, and *From* and *To* time (for partial day request), *Comment* (optional), then click **Submit Request** button.

The 'Request Time Off' modal form is displayed. At the top, it shows the date 'MON JUL 10'. Below this is a calendar grid with a blue bar indicating a schedule from 9 am to 3 pm. The form contains several input fields: 'Time Off Type \*' set to 'ILLNESS 100 PCT', 'Request Type \*' set to 'Partial Day (Start/Stop)', 'Date \*' set to '07/10/2023', 'From \*' set to '10:00 am', and 'To \*' set to '02:00 pm'. The 'Total' field is set to '4.00'. There is a large text area for 'Comment'. At the bottom, there are two buttons: 'Cancel' and 'Submit Request'. A red arrow points to the 'Submit Request' button.

- j. The time off request shows on the employee's calendar as pending approval (dotted-line edge).

Time > Time Off > Request

← Time Off Request

Employee \*  Time Off Type

← JUL 2023 Today Employee View Team View

SUN	MON	TUE	WED	THU	FRI
25	26	27	28	29	30
2	3 PERS DISCRETION (8.00 hrs)	4	5	6	7
9	10 ILLNESS 100 PCT (4.00 hrs)	11	12	13	14
16	17	18	19	20	21

- k. It will then be routed to the supervisor for approval, and once approved, will be posted to the timesheet/accruals for the employee.

UKG 03:44 PM (PDT) Ready Search

TE Good afternoon, Test

Myself

Links

- Quick Links (8)
- Hyperlinks (1)

My Information

- My Profile

My Time

- Timesheet
- Current Timesheet
- Historical Timesheets
- Change Requests
- Time Off
- Request
- History
- Balances

My schedule My time off

← JUL 2023

SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

My Time > Time Off > Accrual Details

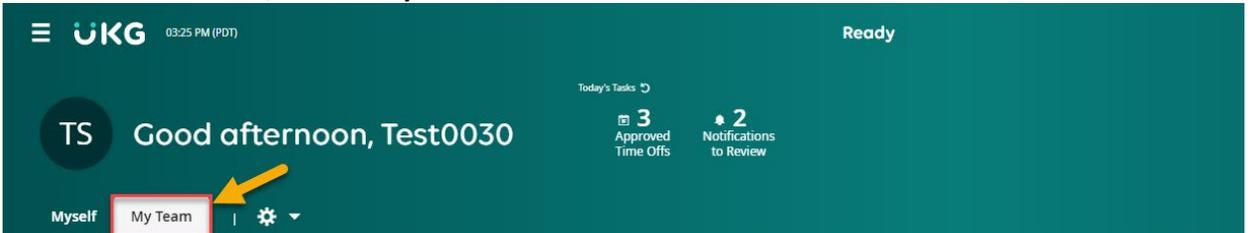
← Accrual Details

Page 1 of 1 1 - 16 of 16 Rows Saved: [System]

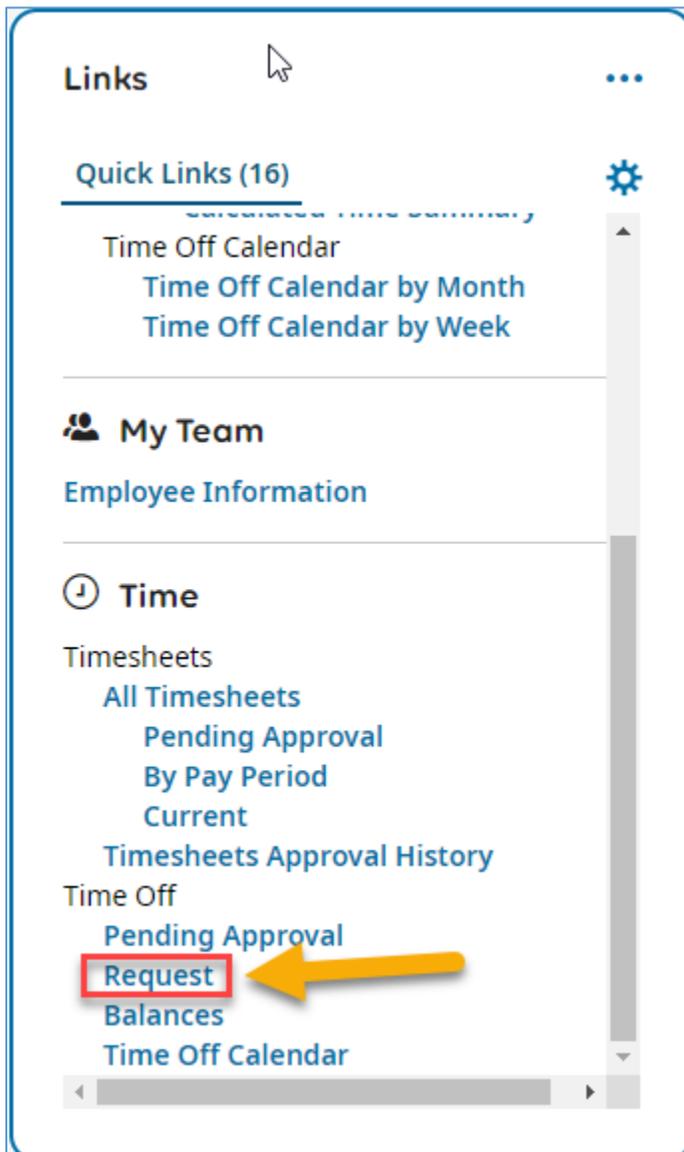
Employee Name	Accrual Value (Days)	Accrual Value (Hours)	Accrual Category	Record Date	Transaction Type
Test Emp - RR-12-8	-	120.000	Illness 100%	07/01/2023	Carry Over
Test Emp - RR-12-8	-	96.000	Illness 100%	07/01/2023	Grant
Test Emp - RR-12-8	-	-8.000	Illness 100%	07/03/2023	Time Off Request
Test Emp - RR-12-8	-	-8.000	Illness 100%	07/06/2023	Time Off
Test Emp - RR-12-8	-	-8.000	Illness 100%	07/07/2023	Time Off
Test Emp - RR-12-8	-	-2.000	Illness 100%	07/10/2023	Time Off
Test Emp - RR-12-8	-	-1.500	Illness 100%	07/10/2023	Time Off

## 7. How to Add an Attachment to a TOR

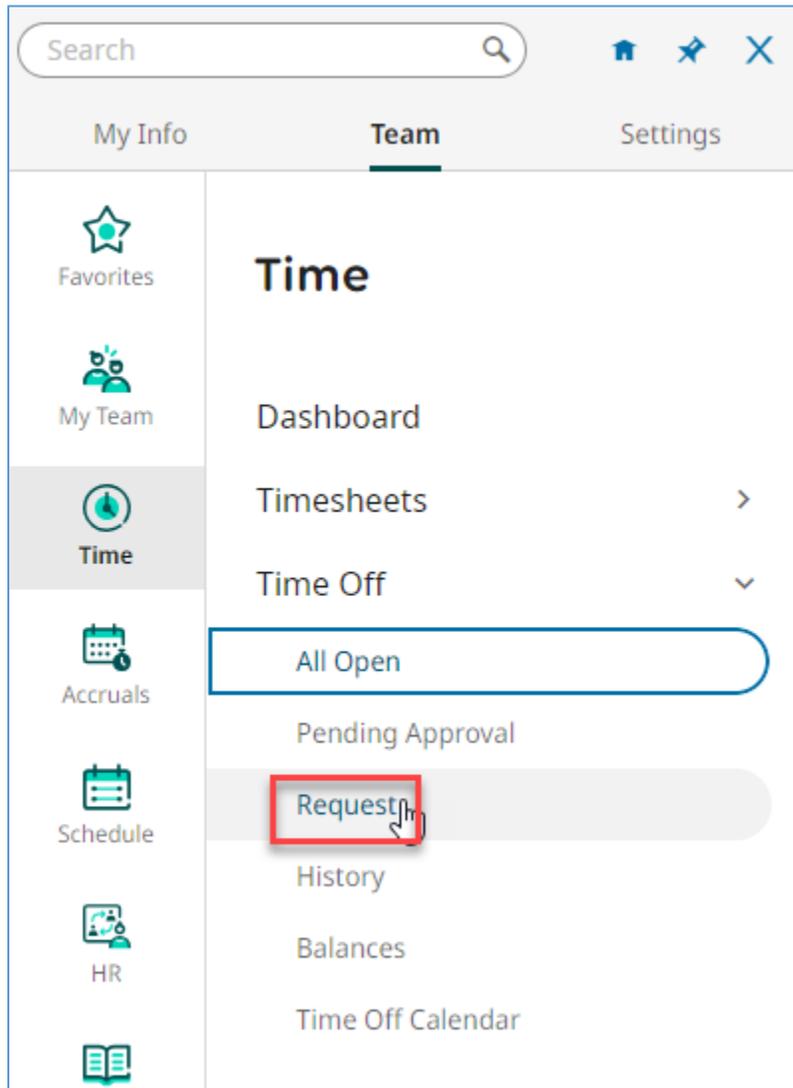
- a. On the Dashboard, click on **My Team** tab.



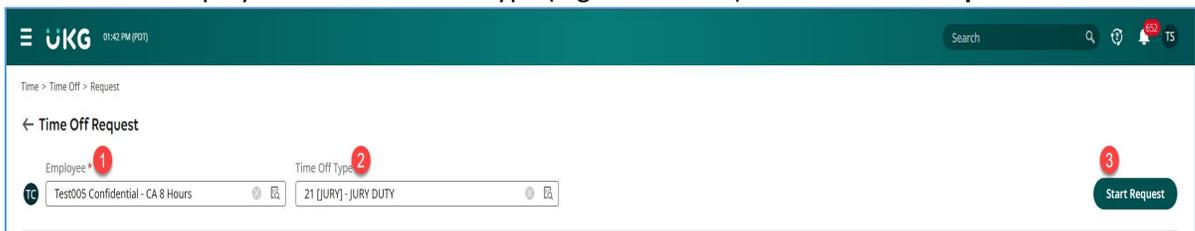
- b. Scroll down the **Quick Links** widget on the left of the page, click *Request* link under the **Time Off** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Request* link under the **Time Off** section.



- d. Select an employee and the time off type (e.g. JURY DUTY) and click **Start Request** button.



- e. The **Request Time Off** box appears. Enter the information for the time off request like *Request Type*, *Date*, and *From* and *To* time (for partial day request), then click on the paper clip button to attach the document (in this case, the jury duty summon notice).

**Request Time Off**

MON OCT 23

Schedule (8.00hrs)

12 am 3 am 6 am 9 am 12 pm 3 pm 6 pm 9 pm 12 am

Time Off Type \* 21 [JURY] - JURY DUTY Request Type \* Full Day

Date \* 10/23/2023 Total 8.00

Upload Document

Projected balance

Start Balance -- End Balance --

Calculate

- f. The **Supporting Documents** box opens, click on **Choose** button.

**Supporting Documents**

A maximum of 5 files are allowed to be selected per upload.

Upload Document

Choose No file chosen

Close

- g. Find the document you want to attach, and click on Upload button.

The screenshot shows a 'Supporting Documents' dialog box with a close button (X) in the top right. Under 'File 1', the file 'Test Document For Attachment Functionality.Pdf' is listed with a trash icon to its right. Below the file name are two input fields: 'Display Name' containing 'Test document for attachment fun' and 'Document Type' which is a dropdown menu. An 'Upload' button is located below these fields, with an orange arrow pointing to it. At the bottom right of the dialog is a 'Close' button.

- h. Click Close button.

The screenshot shows the 'Supporting Documents' dialog box after a successful upload. A green notification bar at the top says 'File uploaded successfully.' with a close button (X). Below it is an information bar: 'A maximum of 5 files are allowed to be selected per upload.' The main area has an 'Upload Document' section with a 'Choose' button and the text 'No file chosen'. Below that, the uploaded file 'Test document for attachment functionality.pdf (56.8 KB)' is listed with its creation date and a trash icon. An orange arrow points to the 'Close' button at the bottom right.

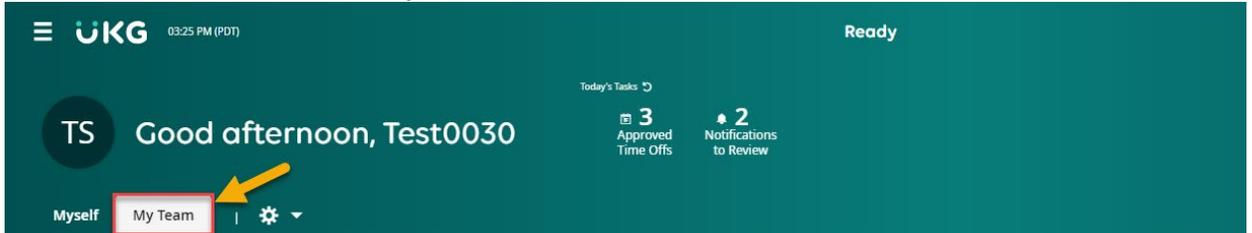
- i. And now, next to the paper clip button there is a number 1 with red dot on top, click **Submit Request** button to submit the TOR.

The screenshot shows a form for submitting a Time Off Request (TOR). Fields include 'Time Off Type' (21 [JURY] - JURY DUTY), 'Request Type' (Full Day), 'Date' (10/23/2023), and 'Total' (8.00). There is an 'Upload Document' section with a paper clip icon and a red box containing the number '1'. Below this is a 'Projected balance' section with 'Start Balance' and 'End Balance' fields, and a 'Calculate' button. A 'Comment' text area is also present. At the bottom, there are 'Cancel' and 'Submit Request' buttons, with an orange arrow pointing to the 'Submit Request' button.

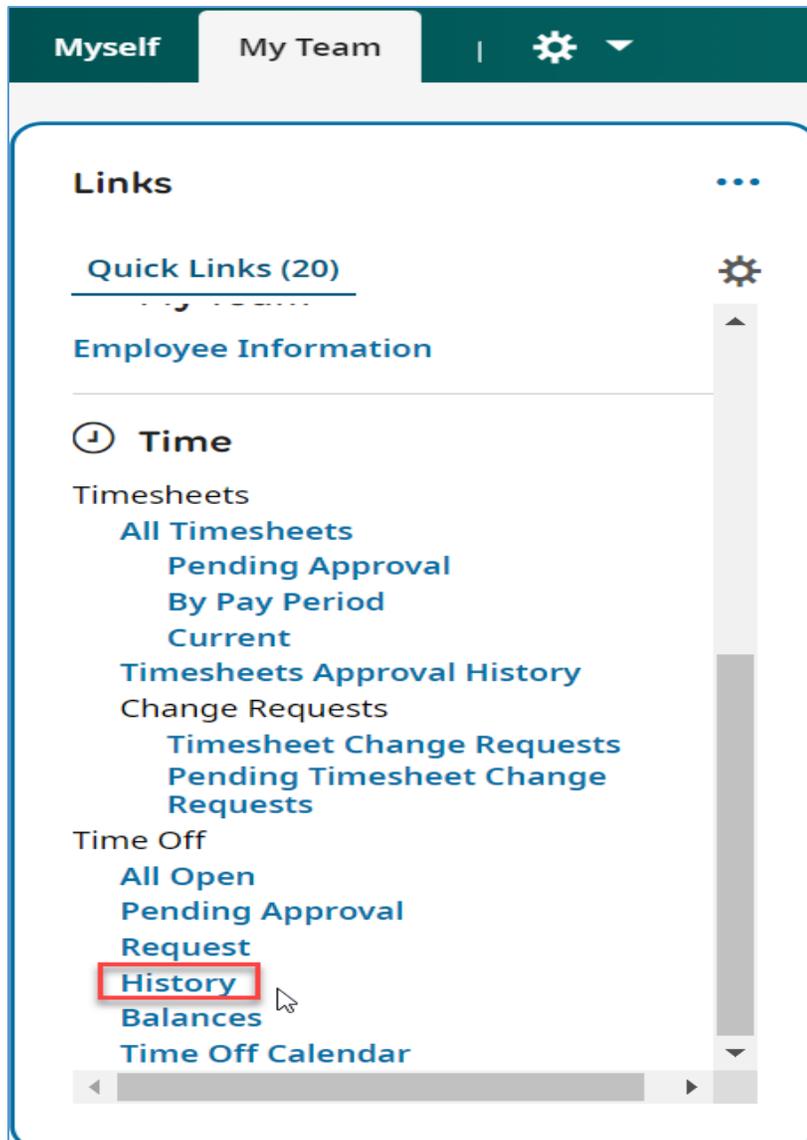
## 8. How to View an Attachment from a TOR

Note: attachment(s) added to a time off request will not be posted to the timesheet. Instead, they can be viewed in the Time Off request **History** panel/report.

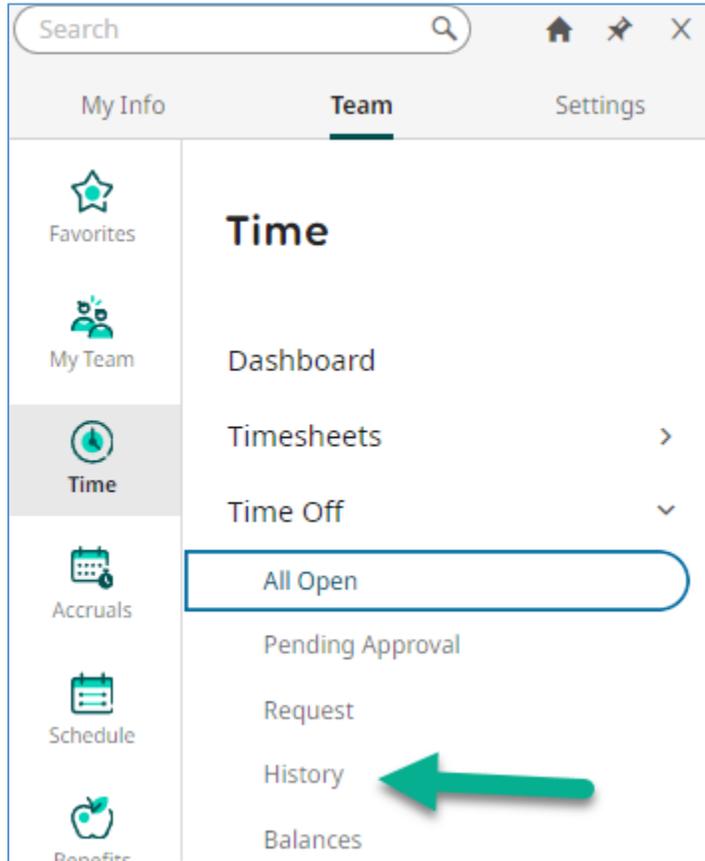
- a. On the Dashboard, click on **My Team** tab.



- b. From the **Quick Links** widget on the left of the page, scroll down and click on *History* link under the **Time Off** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *History* link under the **Time Off** section.

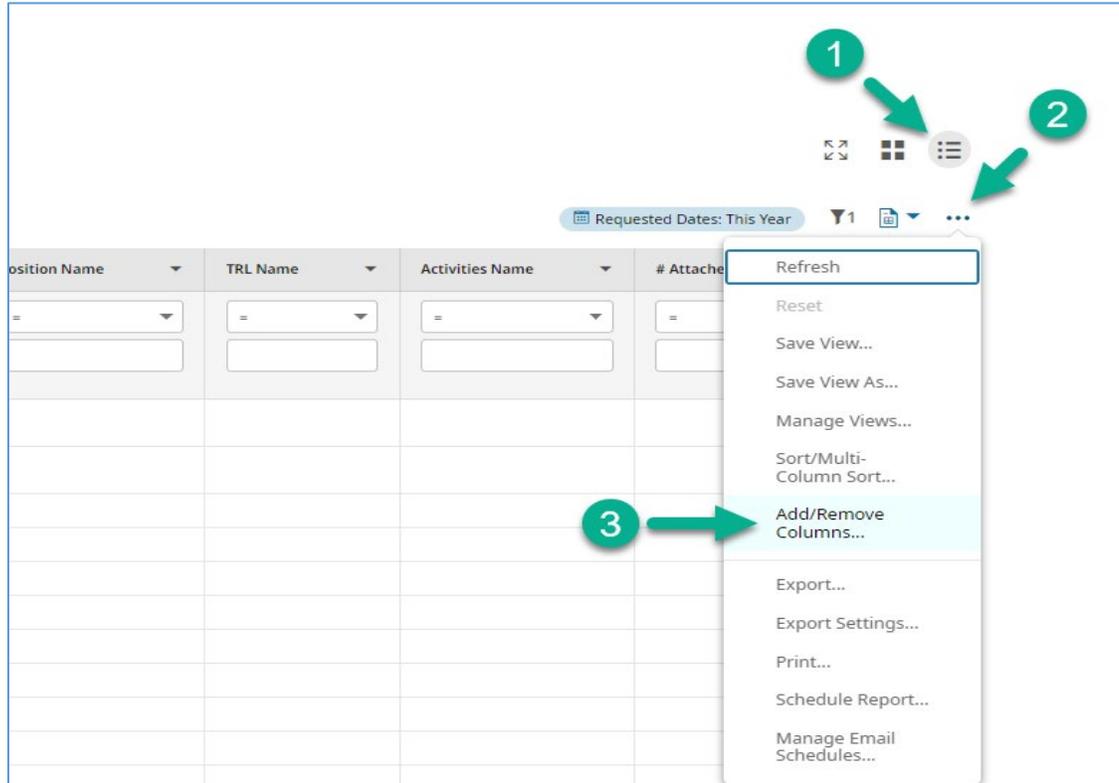


- d. **History** page opens showing all time off requests for your staff for the time range specified on the filter, in this case, "This Month". You can filter on any employee using the filter boxes at the top of the report.

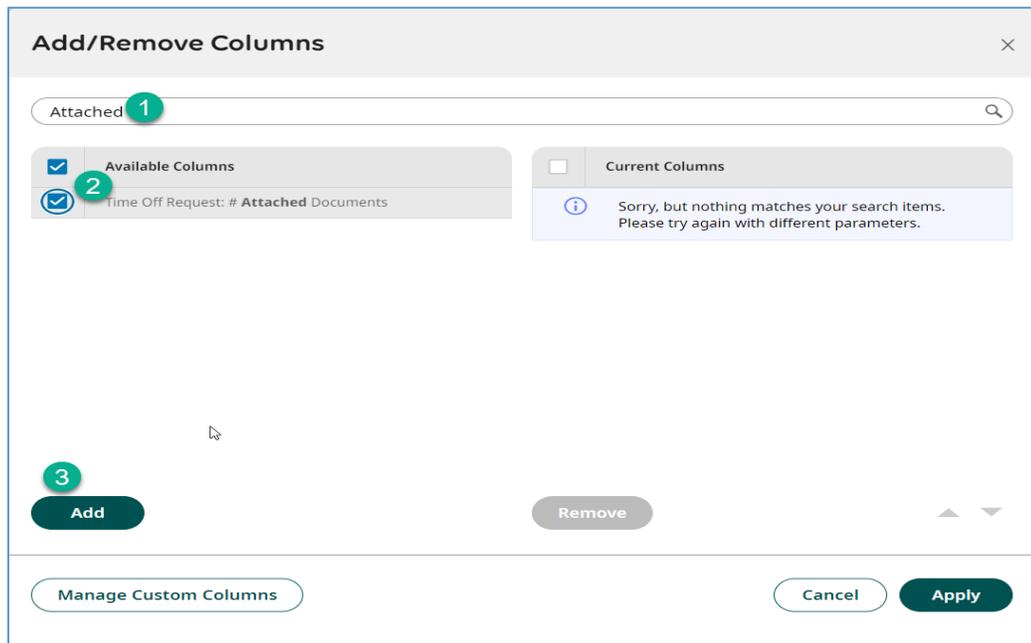
The screenshot shows the 'History' page with a table of time off requests. The filter 'Requested Dates: This Month' is highlighted with a red box. The table has the following columns: Employee Id, Username, First Name, Last Name, Requested Weekday, Last Requested Weekday, Date Requested, Last Date Requested, From, To, and Time. The first two rows of data are visible.

Employee Id	Username	First Name	Last Name	Requested Weekday	Last Requested Weekday	Date Requested	Last Date Requested	From	To	Time
5015	501SP	Test	Emp - MC-12-4	Monday	Tuesday	10/16/2023	10/24/2023	-	-	-
Test005	Test005	Test005	Confidential - CA 8 Hours	Monday	Monday	10/23/2023	10/23/2023	-	-	-

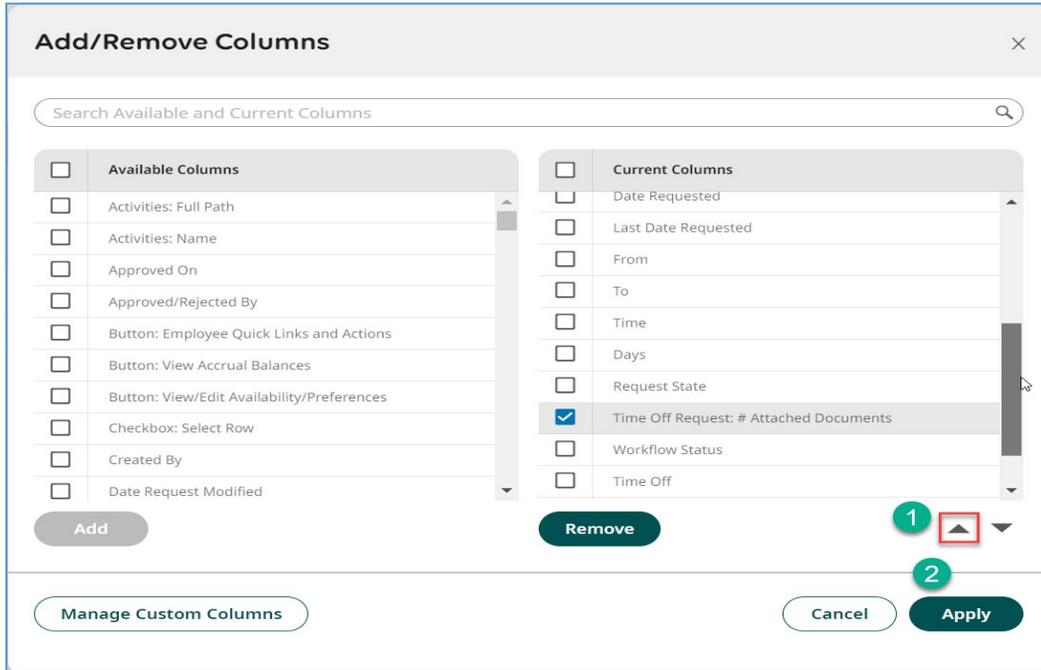
- e. Initially, the current view may be in TILE format. You will need to switch to the List view, then click on the **Actions** (three dot) button, and select *Add/Remove Columns*.



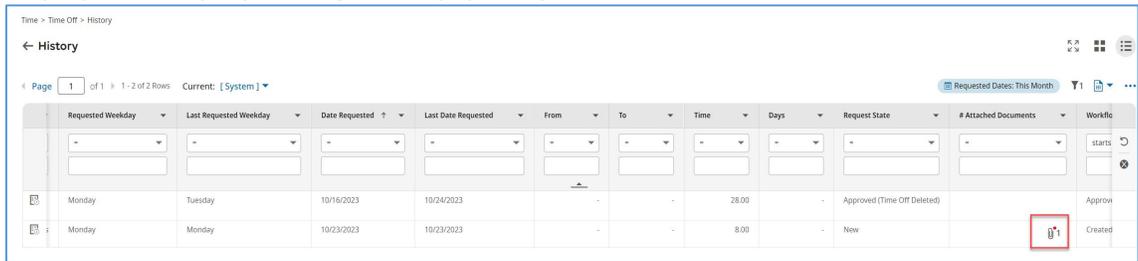
- f. Search for Attached Documents in the search box by typing “Attached” in the Search box, or just scroll to the bottom of **Available Columns** section and select *Time Off Request: # Attached Documents*, then click **Add** button to move it from **Available Columns** to **Current Columns** section.



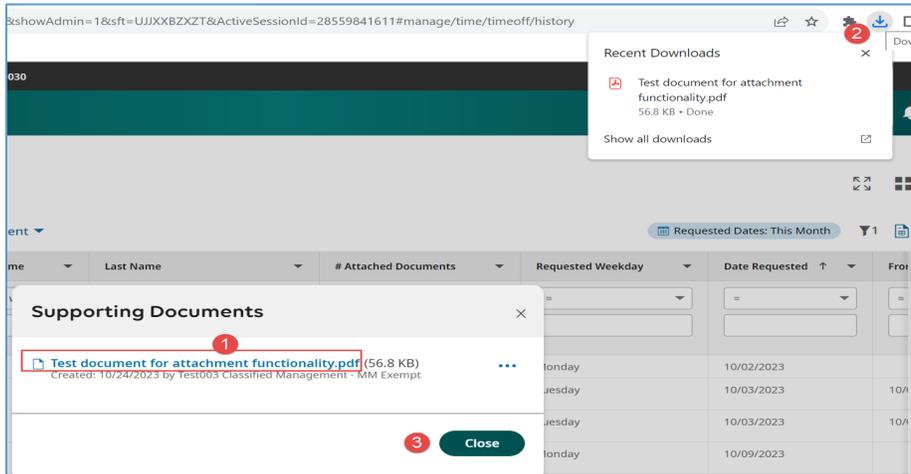
- g. Move it up in the **Current Columns** section to where you like, and click **Apply** button.



- h. You can now access the attached document(s) from the time off requests of your employees, if any, by clicking on the paper clip button.



- i. Click on the hyperlink of the attachment name in the **Supporting Documents** box, and the document will be downloaded for you to view at the top right side of the browser. Once done, click **Close** button.



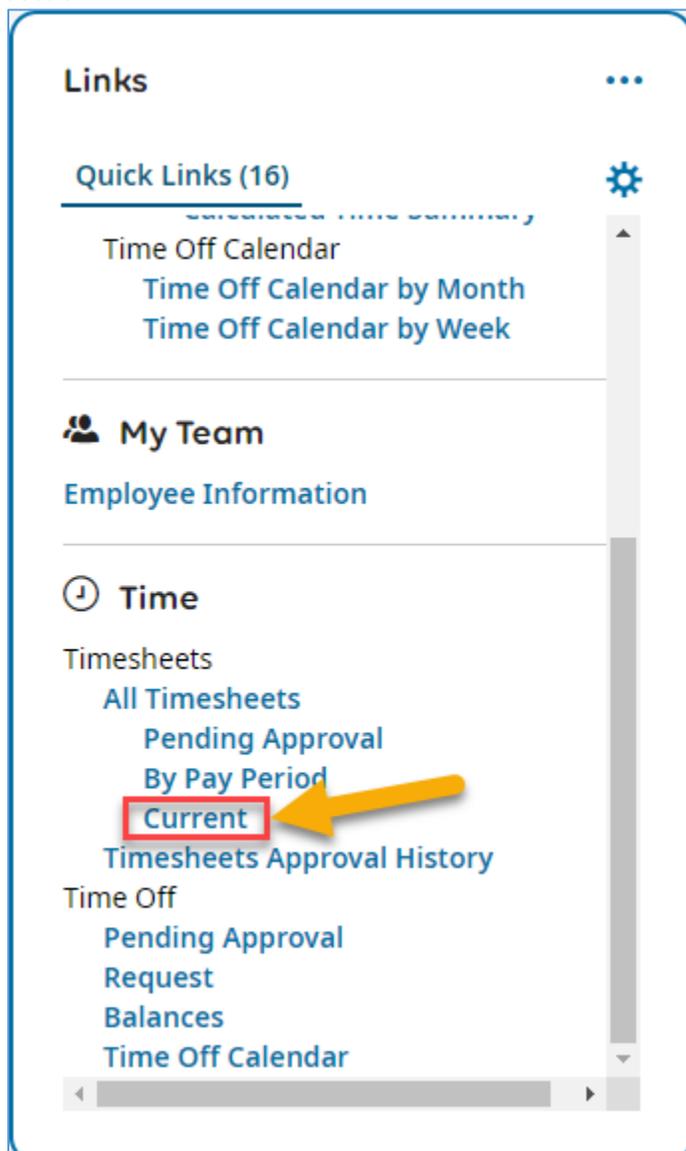
## 9. Enter or Modify a Time Off Entry on Timesheet

Note: This should only be done when you have the approved paperwork.

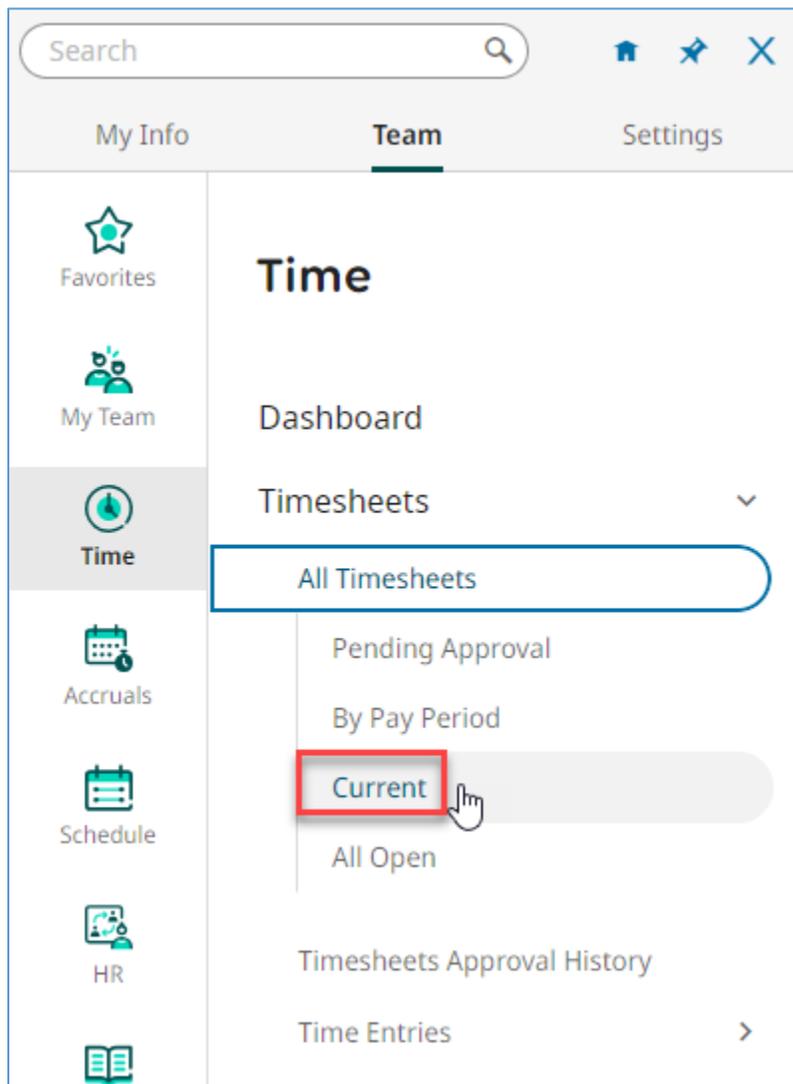
- a. On the Dashboard, click on **My Team** tab.



- b. Scroll down the **Quick Links** widget on the left of the page, click on *Current* link in the **Time** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Current* link under the **Timesheets** section.



- d. The **Timesheets (Current)** page shows the current pay period timesheet for the employees assigned to you. It might have multiple pages.

The screenshot shows the 'Timesheets (Current)' page. At the top, there are navigation buttons: 'View', 'Submit', 'Approve', and 'Reject'. Below that, the page number 'Page 1 of 2' is highlighted with a red box. The table below contains the following data:

Permission	Approval State	Employee Id	First Name	Last Name	Raw Hours	# Records	# Unapproved Time Entries	Timesheet Start	Timesheet End
Approve	Open	5000	Test	Emp - MM-12-8	18.50	4	4	08/01/2023	08/31/2023
Approve	Open	5001	Test	Emp - MN-12-8	25.00	7	7	08/01/2023	08/31/2023
Approve	Open	5002	Test	Emp - NN-12-8	26.00	4	4	08/01/2023	08/31/2023
Approve	Open	5004	Test	Emp - RR-12-8	23.00	6	6	08/01/2023	08/31/2023
Approve	Open	5009	Test	Emp - RR-10-6	11.50	3	3	08/01/2023	08/31/2023

- e. Click on the **Edit Timesheet** button (pencil button) for the employee you want to enter or modify a time off request.

	Permission	Approval	Employee	First Name	Last Name	Raw Hours	# Records	# Unappr	Timeshee	Timeshee
	Edit	Open	5000	Test	Emp - MM-12-8	4.00	1	1	07/01/2023	07/31/2023
	Edit	Open	5001	Test	Emp - MN-12-8	57.00	11	11	07/01/2023	07/31/2023
	Edit	Open	5002	Test	Emp - NN-12-8	34.50	7	7	07/01/2023	07/31/2023
	Edit	Open	5003	Test	Emp - CA-12-8	-	-	-	07/01/2023	07/31/2023
	Edit	Open	5004	Test	Emp - RR-12-8	16.00	2	2	07/01/2023	07/31/2023
	Edit	Open	5005	Test	Emp - TT-12-8	-	-	-	07/01/2023	07/31/2023
	Edit	Open	5006	Test	Emp - MC-12-8	-	-	-	07/01/2023	07/31/2023
	Edit	Open	5008	Test	Emp - MC-11-8	-	-	-	07/01/2023	07/31/2023

- f. To enter a new entry, select the date that the request is on, enter *From* and *To* times, or just enter the *Raw Total* hours for the time off request.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	Note
FRI Sep 1 0730-1600 M 1230-1...	07:30 am	11:30 am	4.00	0.00	FRI Sep 1		Choose...	Choose...	Choose...	
SAT Sep 2			0.00 hrs	0.00 hrs						
SUN Sep 3			0.00 hrs	0.00 hrs						
MON Sep 4			0.00 hrs	0.00 hrs						

- g. Click on the down arrow under the **Time Off** column and then click on *Browse*.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	Note
FRI Sep 1 0730-1600 M 1230-1...	07:30 am	11:30 am	4.00	0.00	FRI Sep 1	<div style="border: 1px solid black; padding: 2px;"> <span style="font-size: small;">▼</span> </div> <div style="border: 1px solid black; padding: 2px; margin-top: 5px;">             Browse...              02 [VACA] - VACATION/IND INJ VAC              INDUST INJURY              02 [VACA] - VACATION           </div>	Choose...	Choose...	Choose...	
SAT Sep 2			0.00 hrs	0.00 hrs						
SUN Sep 3			0.00 hrs	0.00 hrs						
MON Sep 4			0.00 hrs	0.00 hrs						

h. Select the appropriate absence code from the list.

### Browse and Select X

◀ Page  of 2 ▶ 1 - 20 of 33 Rows Search

	Name	Full Path
<input type="radio"/>	02 [VACA] - VACATION	02 [VACA] - VACATION
<input type="radio"/>	03 [ILL] - ILLNESS 100 PCT	03 [ILL] - ILLNESS 100 PCT
<input type="radio"/>	06 [VLIL] - VACA LIEU ILL	02 [VACA] - VACATION/06 [VLIL] - VACA LIEU ILL
<input type="radio"/>	11 [IL50] - ILLNESS 50 DKT	11 [IL50] - ILLNESS 50 DKT
<input type="radio"/>	13 [I109] - ILLNESS AB109	03 [ILL] - ILLNESS 100 PCT/13 [I109] - ILLNESS AB109
<input type="radio"/>	16 [BRVT] - BEREAVEMENT	16 [BRVT] - BEREAVEMENT
<input type="radio"/>	17 [PNEC] - PERS NECESS	03 [ILL] - ILLNESS 100 PCT/17 [PNEC] - PERS NECESS
<input type="radio"/>	19 [PDIS] - PERS DISCRETION	03 [ILL] - ILLNESS 100 PCT/17 [PNEC] - PERS NECESS/19 [PDIS] - PERS DISCRETION
<input type="radio"/>	21 [JURY] - JURY DUTY	21 [JURY] - JURY DUTY

Close

i. Click **Save** button.

Time > Timesheets

← Timesheet Edit 
Save
Submit
Approve
...

Test Emp - NN-12-8 (5002)
September 01, 2023 - September 30, 2023
Open

Time Entry
Extra Pay & Counter Adjustment
Exceptions
Calc Detail
Calc Summary
Counters
Summary By Day

0.00 hrs
0.00 hrs
0.00 hrs

Worked Hours
Time Off Hours
Overtime Hours

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	Notes
<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">▼</div> <div style="font-size: x-small;">FRI Sep 1 07:30-16:00 M 1230-1...</div> </div>	07:30 am	11:30 am	4.00 hrs	0.00 hrs	FRI Sep 1	03 [ILL] - ILLNESS 100 PCT	Choose...	Choose...	Choose...	
> SAT Sep 2			0.00 hrs	0.00 hrs						
> SUN Sep 3			0.00 hrs	0.00 hrs						

- j. To modify an existing entry on the timesheet, for example, changing a time off entry from Possible Industrial Injury – Illness 100% to Industrial Injury leave code, after the workers’ comp case has been approved, select the date with the original time off entry.

The screenshot shows the 'Timesheet Edit' page for 'Test Emp - NN-12-8 (5002)'. The date range is 'September 01, 2023 - September 30, 2023'. The 'Time Entry' tab is active. At the top, there are three columns for 'Worked Hours', 'Time Off Hours', and 'Overtime Hours', all showing '0.00 hrs'. Below this is a table with columns: Date, From, To, Raw Total, Calc. Total, In Date, Time Off, Position, Time Report Location, Activities, and Notes. The entry for 'TUE Sep 5' is expanded, showing a time off entry with a red box around it. The 'Time Off' column contains '03 [ILL] - ILLNESS 100 PCT/31 [PINI] - POSS IND INJURY'.

- k. Click on the down arrow under the **Time Off** column and then click on *Browse*.

This screenshot shows the same 'Timesheet Edit' page as above, but with the dropdown menu for the 'Time Off' column of the 'TUE Sep 5' entry open. A red circle labeled '1' points to the dropdown arrow, and another red circle labeled '2' points to the 'Browse...' option in the dropdown list. The dropdown list includes several codes such as '03 [ILL] - ILLNESS 100 PCT/31 [PINI] - POSS IND INJURY', '03 [ILL] - ILLNESS 100 PCT', '02 [VACA] - VACATION/IND INJ VAC', 'INDUST INJURY', and '02 [VACA] - VACATION'.

- l. Select the code **INDUST INJURY** from the list. You might have to go to page 2 to find the code.

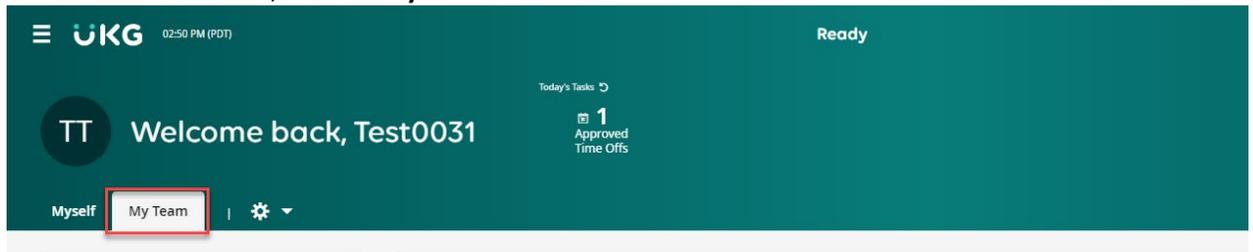
The screenshot shows a search results page with 'Page 2 of 2' and '21 - 33 of 33 Rows'. A search bar is at the top right. Below is a table with two columns: 'Name' and 'Full Path'. The entry 'INDUST INJURY' is highlighted with a red box. The table lists various codes and their full paths, including 'ADMIN LEAVE UNP', 'BOARD RECESS', 'COMP TIME EARNED', 'FMLA UNPAID', 'HOLIDAY', 'IND INJ SICK 50', 'IND INJ SICK100', 'IND INJ VAC', 'INDUST INJURY', and 'MILITARY'.

- m. Click **Save** button.

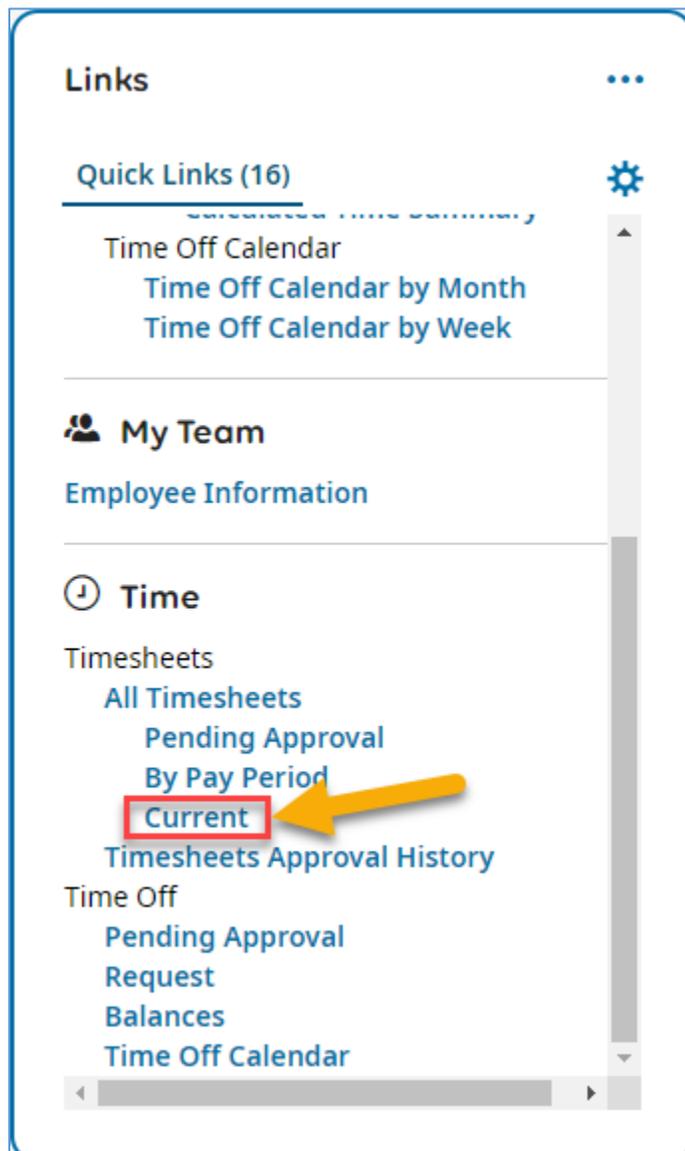
This screenshot shows the 'Timesheet Edit' page with the 'INDUST INJURY' code selected in the 'Time Off' column of the 'TUE Sep 5' entry. A yellow arrow points to the 'Save' button in the top right corner of the interface. The 'Save' button is highlighted in green.

## 10. How to Report First Day Worked or Last Day Worked on Timesheet

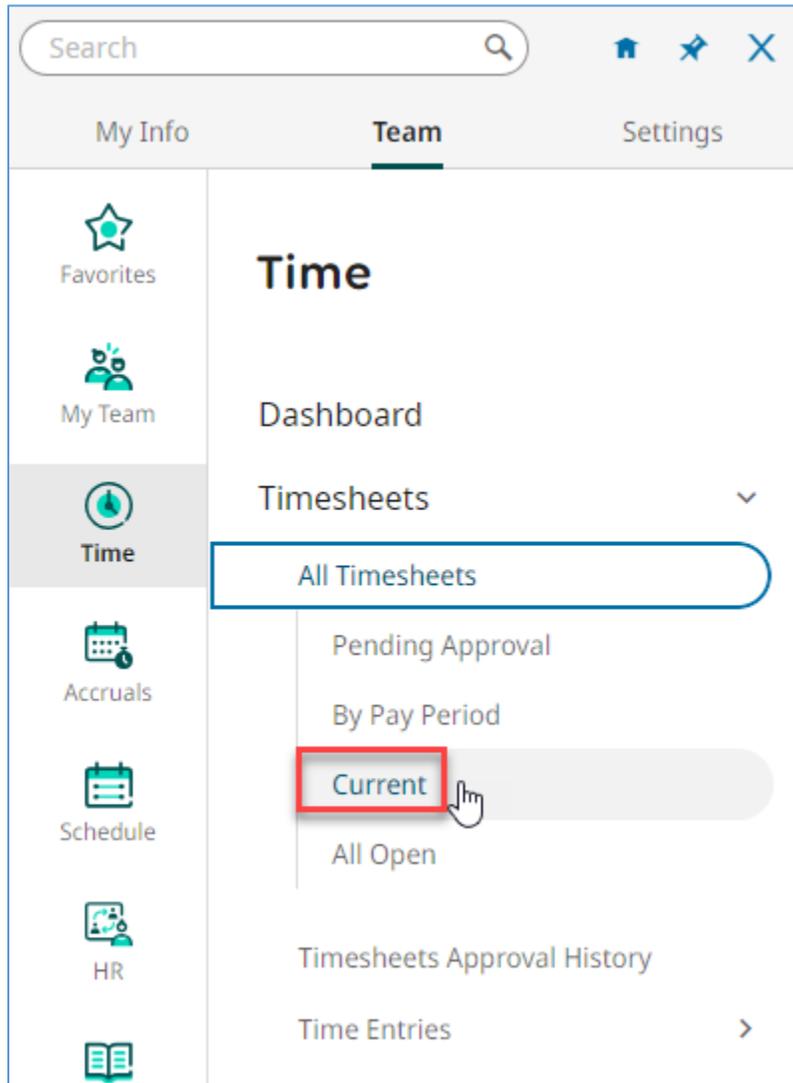
a. On the Dashboard, click on **My Team** tab.



b. Scroll down the **Quick Links** widget on the left of the page, click on *Current* link in the **Time** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Current* link under the **Timesheets** section.



- d. The **Timesheets (Current)** page shows the current pay period timesheet for the employees assigned to you. It might have multiple pages.

Time > Timesheets

← Timesheets (Current) View Submit Approve Reject ...

Page 1 of 2 | 1 - 20 of 34 Rows | Current view | Date: 08/14/2023 | (1)

	Permission	Approval State	Employee Id	First Name	Last Name	Raw Hours	# Records	# Unapproved Time Entries	Timesheet Start	Timesheet End
<input type="checkbox"/>	=	=	starts with	starts with	starts with	=	=	=	=	=
<input type="checkbox"/>	Approve	Open	5000	Test	Emp - MM-12-8	18.50	4	4	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	5001	Test	Emp - MN-12-8	25.00	7	7	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	5002	Test	Emp - NN-12-8	26.00	4	4	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	5004	Test	Emp - RR-12-8	23.00	6	6	08/01/2023	08/31/2023
<input type="checkbox"/>	Approve	Open	5009	Test	Emp - RR-10-6	11.50	3	3	08/01/2023	08/31/2023

- e. Click on the **Edit Timesheet** button (pencil button) for the employee you want to report the FWD or LWD entry for.

Permission	Approval	Employee	First Name	Last Name	Raw Hours	# Records	# Unappr	Timesheet Start	Timesheet End
Edit	Open	5000	Test	Emp - MM-12-8	4.00	1	1	07/01/2023	07/31/2023
Edit	Open	5001	Test	Emp - MN-12-8	57.00	11	11	07/01/2023	07/31/2023
Edit	Open	5002	Test	Emp - NN-12-8	34.50	7	7	07/01/2023	07/31/2023
Edit	Open	5003	Test	Emp - CA-12-8	-	-	-	07/01/2023	07/31/2023
Edit	Open	5004	Test	Emp - RR-12-8	16.00	2	2	07/01/2023	07/31/2023
Edit	Open	5005	Test	Emp - TT-12-8	-	-	-	07/01/2023	07/31/2023
Edit	Open	5006	Test	Emp - MC-12-8	-	-	-	07/01/2023	07/31/2023
Edit	Open	5008	Test	Emp - MC-11-8	-	-	-	07/01/2023	07/31/2023

- f. Select the date, enter *From* and *To* times, or just enter the *Raw Total* hours for the entry.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities
SUN Oct 1			0.00 hrs	0.00 hrs					
MON Oct 2	07:30 am	04:00 pm	8.50	0.00	MON Oct 2		Choose...	Choose...	Choose...
			8.50 hrs	0.00 hrs					

- g. For a salaried employee, click on the down arrow under the **Time Off** column and then click on **Browse**.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities
SUN Oct 1			0.00 hrs	0.00 hrs					
MON Oct 2	07:30 am	04:00 pm	8.50	0.00	MON Oct 2		Choose...	Choose...	Choose...
TUE Oct 3			0.00 hrs	0.00 hrs					
WED Oct 4			0.00 hrs	0.00 hrs					

h. Select FDW or LDW option.

### Browse and Select X

◀ Page  of 2 ▶ 21 - 27 of 27 Rows Search 🔍

	Name	Full Path
<input type="radio"/>	46 [ALPD] - ADMIN LEAVE PD	46 [ALPD] - ADMIN LEAVE PD
<input type="radio"/>	50 [PI5] - POSS IND INJ 50	11 [IL50] - ILLNESS 50 DKT/50 [PI5] - POSS IND INJ 50
<input type="radio"/>	51 [PIV] - POSS IND INJ VC	02 [VACA] - VACATION/51 [PIV] - POSS IND INJ VC
<input type="radio"/>	52 [LDW] Last Day Worked	52 [LDW] Last Day Worked
<input type="radio"/>	53 [FDW] First Day Worked	53 [FDW] First Day Worked
<input type="radio"/>	54 [CTLV] - CATASTROPHIC LV	54 [CTLV] - CATASTROPHIC LV
<input type="radio"/>	57 [NDD] - NON DUTY DAY TT	57 [NDD] - NON DUTY DAY TT

Close

i. Click **Save** button.

Time > Timesheets

← Timesheet Edit 🔍 📄 Save Submit Historical Corrections ⋮

👤 Test Emp - NN-12-8 (5002) | 📅 October 01, 2023 - October 31, 2023 ▶ Open 🗨

Time Entry Extra Pay & Counter Adjustment Exceptions Calc Detail More Tabs (3) ▾

◀ 0.00 hrs 0.00 hrs 0.00 hrs ▶  
Worked Hours Time Off Hours Overtime Hours

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	
▶ SUN Oct 1	+		0.00 hrs	0.00 hrs						
▼ MON Oct 2 0730-1600 M 1230-1...	⋮	07:30 am	04:00 pm	8.50	0.00	MON Oct 2	53 [FDW] First Day Worked	Choose... 🗨	Choose... 🗨	Choose...
	+		8.50 hrs	0.00 hrs						

j. For **an hourly employee**, click on the *Time Entry Notes* button under the **Notes** column.

Time > Timesheets

← Timesheet Edit 🔍 📄

👤 Test016 Hourly Monthly EE 8 Hrs (Test016) | 📅 September 01, 2023 - September 30, 2023 ▶

Time Entry Extra Pay & Counter Adjustment Exceptions Calc Detail Calc Summary Counters Summary By Day

◀ 0.00 hrs 0.00 hrs 0.00 hrs ▶  
Worked Hours Time Off Hours Overtime Hours

Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	Notes
▼ FRI Sep 1 No Schedule	⋮	08:00 am	04:30 pm	8.50	0.00	FRI Sep 1		Choose... 🗨	Choose... 🗨	Choose... 🗨
	+		8.50 hrs	0.00 hrs						<span style="border: 1px solid red; padding: 2px;">🗨 Time Entry Notes</span>

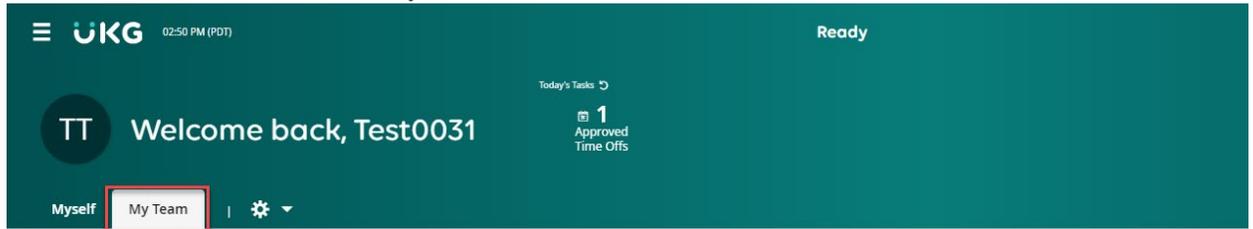
- k. The **Time Entry Notes** panel opens. Enter “First Worked Day” or “Last Worked Day” in the note box, then click **Save** button.

- l. Now there is a red dot and a number ‘1’ to the right of the **Time Entry Notes** button. Click **Save** button.

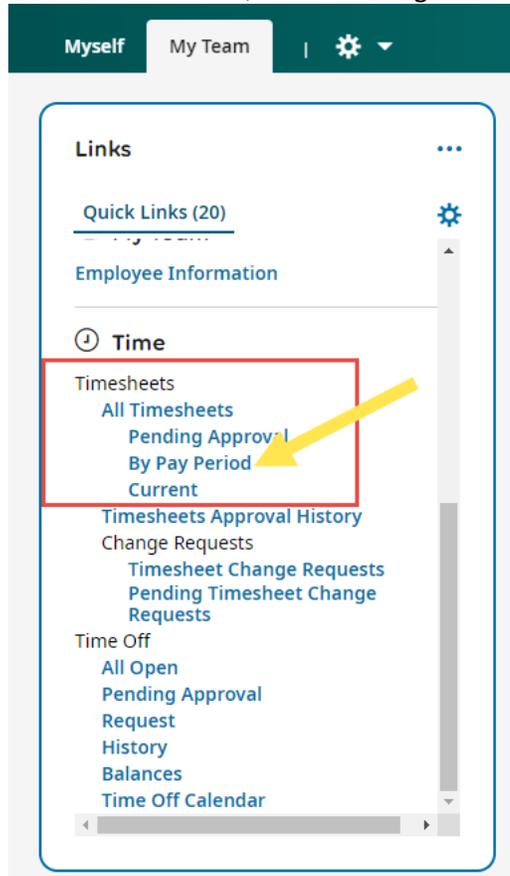
Date	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	Notes
FRI Sep 1 No Schedule	04:30 pm	8.50	0.00	FRI Sep 1		Choose...	Choose...	Choose...	1
		8.50 hrs	0.00 hrs						

## 11. Access Timesheets for Your Team By Pay Period

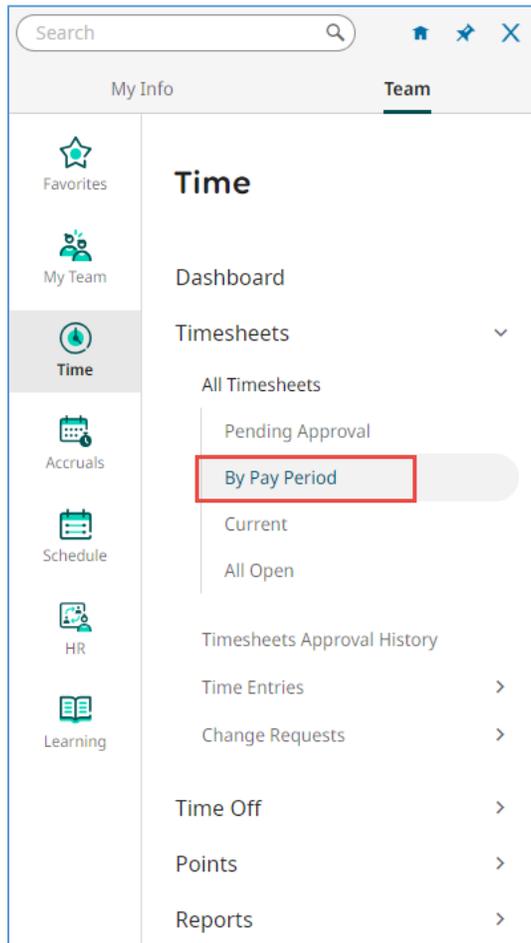
a. On the Dashboard, click on **My Team** tab.



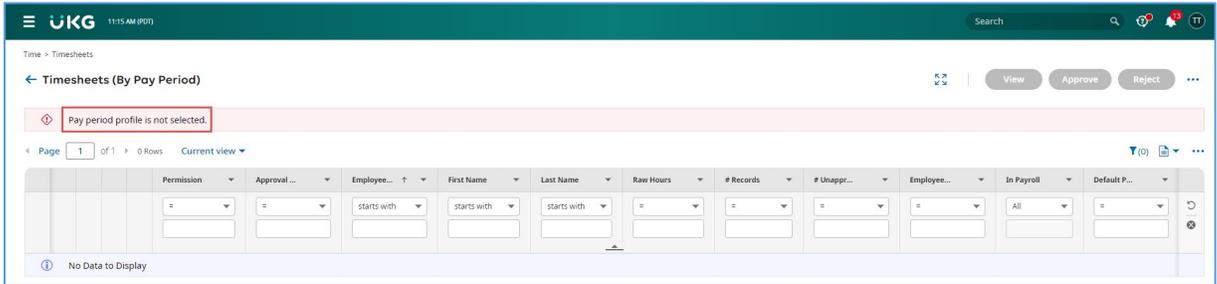
b. Scroll down in the **Quick Links** widget to **Timesheets** section and click on *By Pay Period* link.



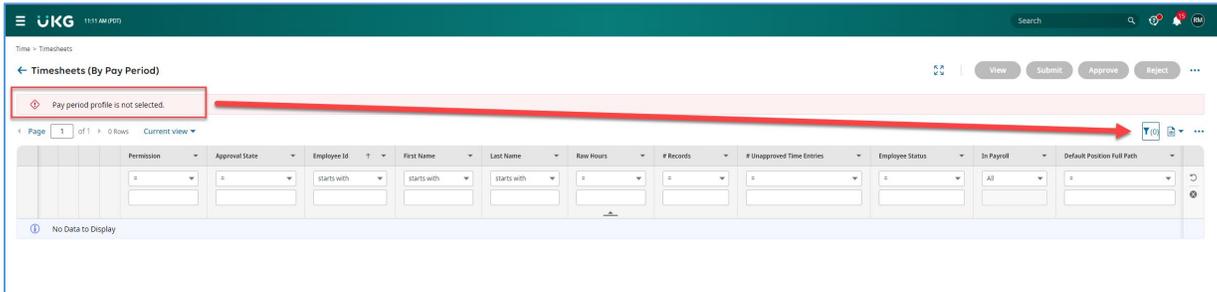
- c. Or from the **Main** menu , in the **Team** tab, click on *By Pay Period* link under the **Timesheets** section.



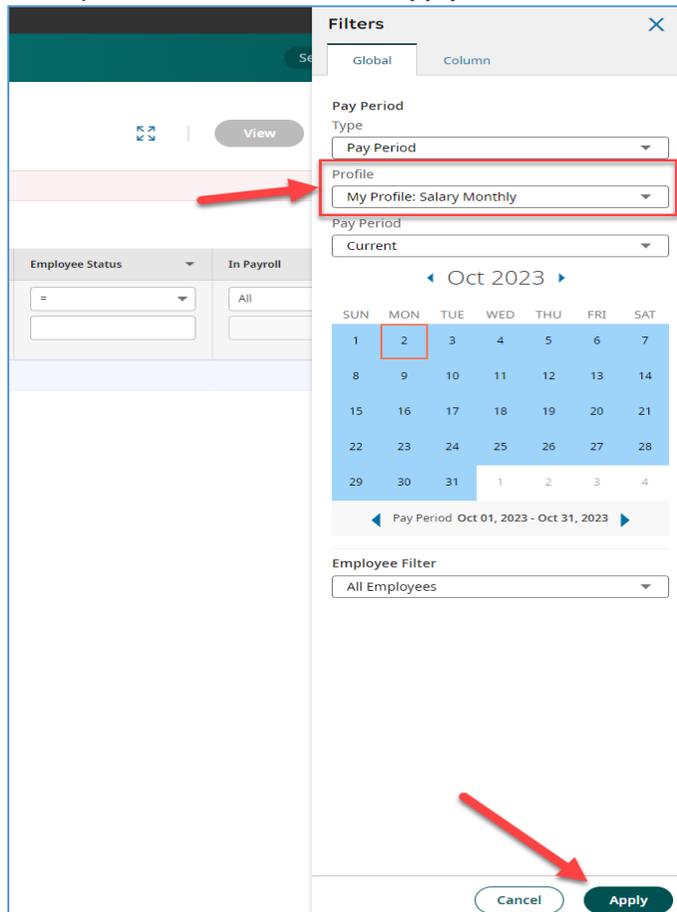
- d. The **Timesheets (By Pay Period)** page might be blank with the message “Pay period profile is not selected.” if this is your first time accessing it.



- e. Click on the **Filter** button on the right.



- f. Make your selections, then click **Apply** button.



g. Your employee list of timesheets for the selected criteria should show.

Permission	Approval State	Employee ID	First Name	Last Name	Raw Hours	# Records	# Unapproved Time Entries	Employee Status	In Payroll	Default Position Full Path
Approve	Open				8.00	1	1	Active	Yes	696301 HS DELEGATE FISCAL LEAD
Approve	Open				-	-	-	Active	Yes	698503 HS CHLD DEV AND ED CLT
Approve	Open				-	-	-	Active	Yes	951156 HS EARLY LEARNING ANALYST
Approve	Open				48.00	6	6	Active	Yes	698511 HS CHLD DEV AND ED CLT
Approve	Open				-	-	-	Active	Yes	698801 HS COMMUNITY OUTRCH CLT
Approve	Open				-	-	-	Active	Yes	382203 SR TYPST CLK BLING SPAN
Approve	Open				-	-	-	Active	Yes	817003 FACILITIES PLANNING SPEC
Approve	Open				-	-	-	Active	Yes	652001 HS DISABILITY SVCS SPEC
Approve	Open				-	-	-	Active	Yes	691011 HS CHLD DEV AND ED SPEC
Approve	Never Opened				-	-	-	Terminated	No	025008 COORDINATOR III
Page Total					56.00	7	7			

h. Save the view to make this the defaulted view in the future by clicking on the ellipses (three dots) on the right, and select **Save View As**.

Permission	Approval ...	Employee...	First Name	Last Name	Raw Hours	# Records	# Unappr...	Employee...	In Payroll
Approve	Open	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	-	-	-	Active	Yes
Approve	Open	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	-	-	-	Active	Yes
Approve	Open	Test003	Test003	Classified Management - MM Exempt	-	-	-	Not In Payroll	No
Approve	Open	Test004	Test004	Classified Mgmt - M N 8 Hours	-	-	-	Not In Payroll	No
Approve	Open	Test005	Test005	Confidential - CA 8 Hours	-	-	-	Not In Payroll	No
Approve	Open	Test006	Test006	CSEA - ER 4.5 Hours	-	-	-	Not In Payroll	No
Approve	Open	Test007	Test007	CSEA - ER 5 Hours	-	-	-	Not In Payroll	No

i. Give it a name and check **My Default** box, then click **Save & Run** button

### Save View As ✕

Name \* 1

Employee TS By Pay Period

Description

Tag

Deletion and Overwriting Is Not Allowed ?

**My Default** 2

Run Immediately ?

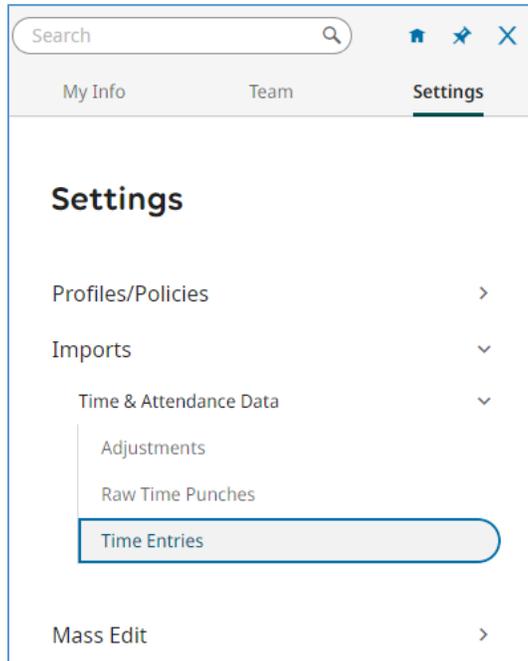
Share

3

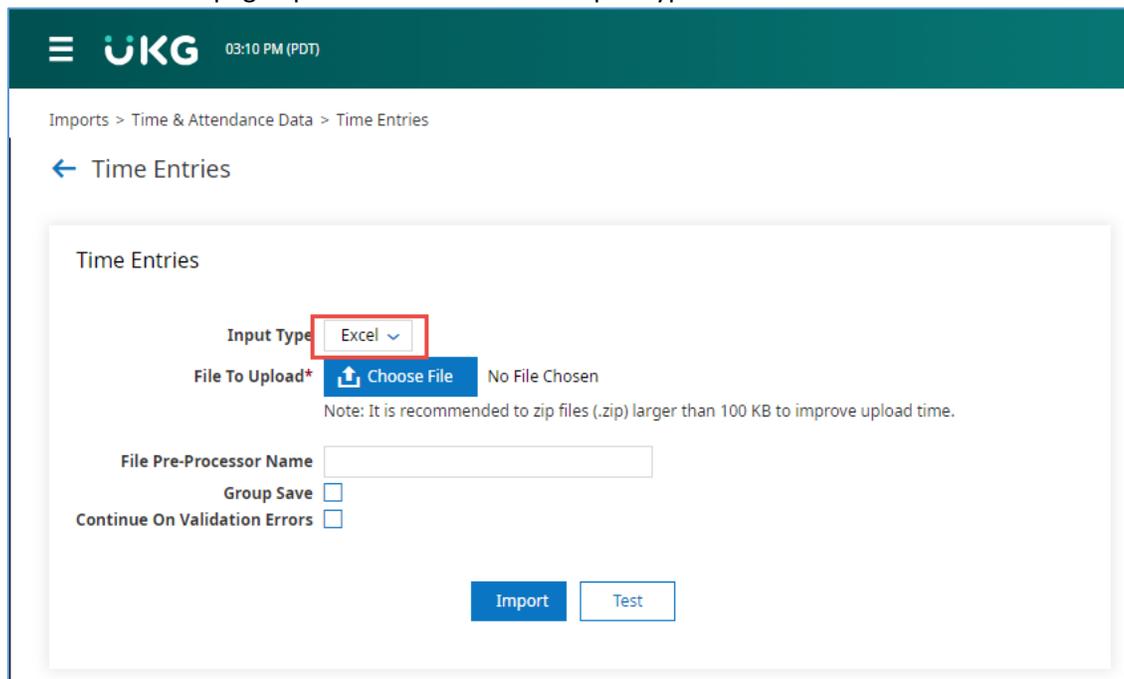
Cancel
Save
Save & Run

## 12. Import of Bulk Entries to Timesheet(s)

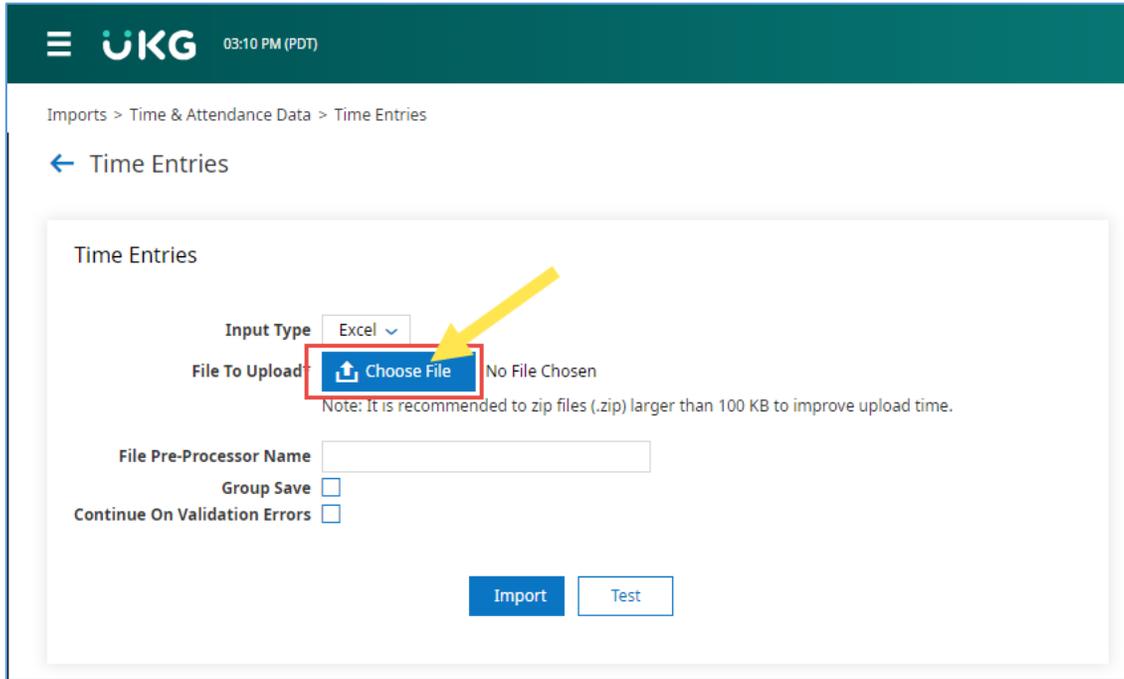
- a. From the **Main** menu , in the **Settings** tab, click on *Time Entries* link under the **Imports** section.



- b. The **Time Entries** page open with the defaulted Input Type for Excel.



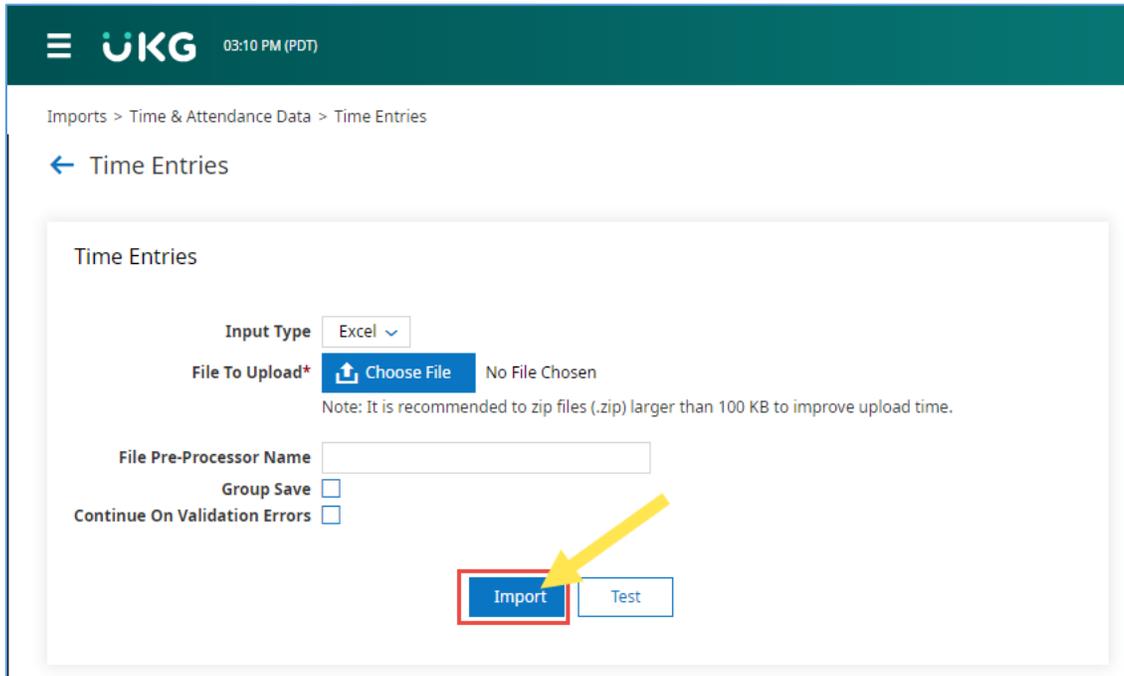
- c. Click on the Choose File button.



- d. Choose your file on your computer, which should be populated per the instructions on the Import template, like the sample below.

Employee Id	Pay Date	In Date	Time In	Time Out	Total Time	Piece Quantity	Override	Time Off	Cost Center 1	Cost Center 2	Cost Center 3	Note
NW2778241	09/01/2023				6							
PT2058358	09/01/2023		16:00	17:00								

- e. Click **Import** button.



f. System imports the entries and the Import Results page shows the status.

Imports > Time & Attendance Data > Time Entries

← Import Results

Rows On Page: 20 | 3 Rows | Refresh Data

Date Created: Calendar Range | All

Type	Message	Row	Col
Info	# Time Entries In File: 2		-
Info	# Of New Entries Created: 2		-
Info	Done		-

g. Go to employees' timesheet to verify.

Time > Timesheets

← Timesheet Edit

Save

Employee ID: NW2778241 | Period: September 01, 2023 - September 15, 2023 | Open

Time Entry | Extra Pay & Counter Adjustment | Exceptions | Calc Detail | Calc Summary | Counters | Summary By Day

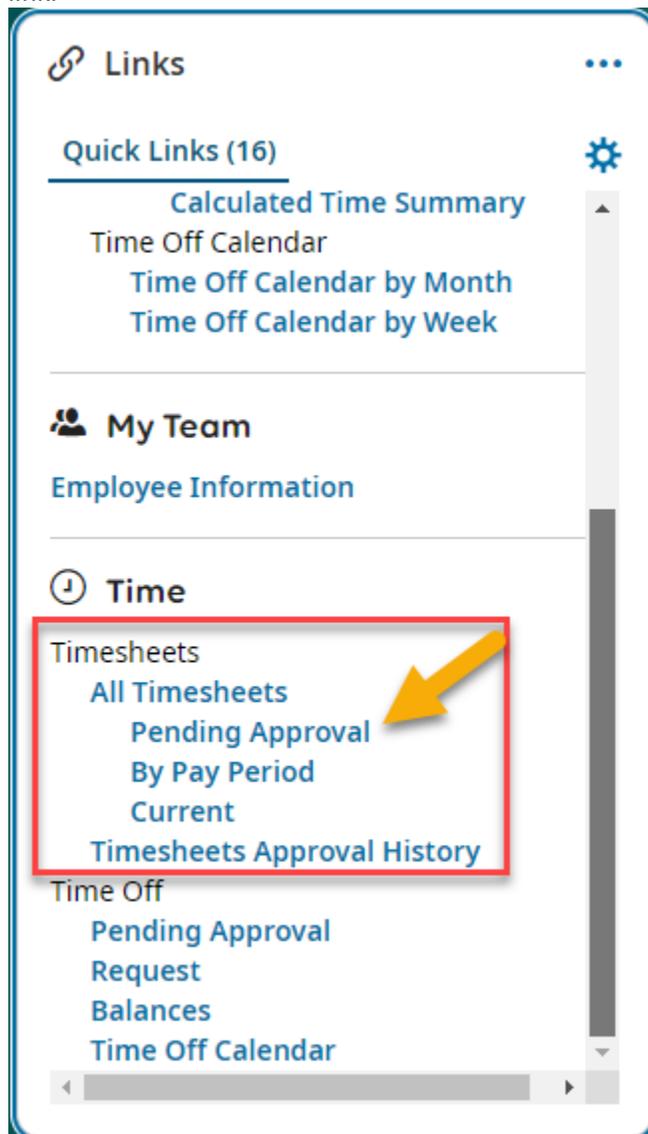
Date	From	To	Raw Total	Calc. Total	In Date	Time Off	Position	Time Report Location	Activities	Notes
FRI Sep 1 No Schedule	From am	To am	6.00	6.00	FRI Sep 1		955402 EXAMINATION ASST	108	Choose...	
			6.00 hrs	6.00 hrs						

### 13. Approve an Employee's Timesheet

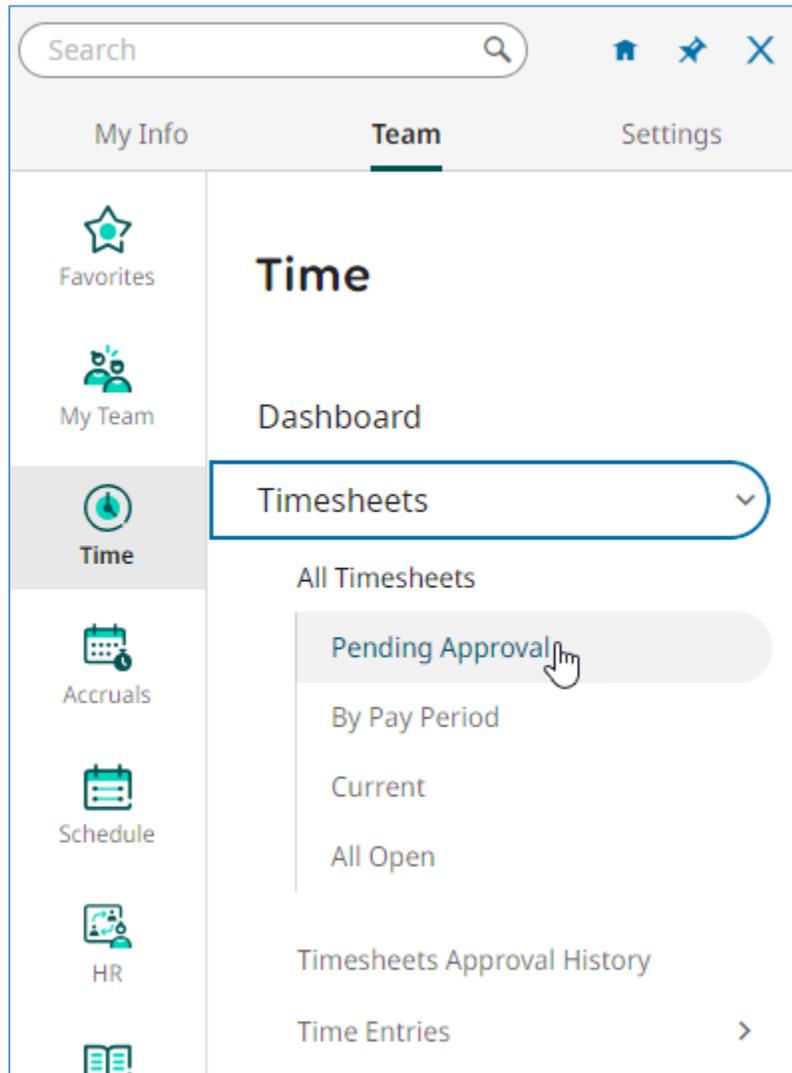
a. On the Dashboard, click on **My Team** tab.



b. Scroll down in the **Quick Links** widget to **Timesheets** section and click on *Pending Approval* link.



- c. Or from the **Main** menu , in the **Team** tab, click on *Pending Approval* link under the **Timesheets** section.



- d. The **Timesheets (Pending Approval)** page shows the timesheet for the employees assigned to you that are pending your approval. It might have multiple pages. This will be the same view for Timekeepers and Time Managers. Once the Timekeeper approves the timesheet(s), they will be routed to the Time Manager's queue for approval.

Employee	First Name	Last Name	Raw Hours	# Records	# Unappr.	Timesheet Start	Timesheet End	Comment	Default P.	Employee	In Payroll	Approval
Test005	Test005	Confidential - CA 8 Hours	67.00	11	11	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test004	Test004	Classified Mgmt- MN 8 Hours	60.50	13	13	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test006	Test006	CSEA - ER 4.5 Hours	71.00	18	18	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test007	Test007	CSEA - ER 5 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test008	Test008	CSEA - ER 5.5 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test009	Test009	CSEA - ER 6 Hours	16.00	5	5	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test010	Test010	CSEA - ER 6.5 Hours	43.00	12	12	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test011	Test011	CSEA-RR 5 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test012	Test012	CSEA-RR 6 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	24.00	5	5	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Page Total			313.50	68	68							

- e. The timesheets can be mass approved by clicking on the *All On Page* or *All On Report* options when clicking on the checkbox at the top left. *All On Page* will select the timesheets that are currently shown on the page; and *All On Report* will select all timesheets pending your approval, if there are more entries than what is shown on one page.

Employee Id	First Name	Last Name	Raw Hours	# Records	# Unapproved Time Entries	Timesheet Start	Timesheet End	Comment	Default Positi
Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	8.00	1	1	09/01/2023	09/30/2023		
Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	8.00	1	1	09/01/2023	09/30/2023		
Test003	Test003	Classified Management - MM Exempt	8.00	1	1	09/01/2023	09/30/2023		
Test004	Test004	Classified Mgmt- MN 8 Hours	8.00	1	1	09/01/2023	09/30/2023		
Test005	Test005	Confidential - CA 8 Hours	8.00	1	1	09/01/2023	09/30/2023		
5000	Test	Emp - MM-12-8	11.00	2	2	09/01/2023	09/30/2023		
Test006	Test006	CSEA - ER 4.5 Hours	8.00	1	1	09/01/2023	09/30/2023		
Test007	Test007	CSEA - ER 5 Hours	8.00	1	1	09/01/2023	09/30/2023		
5001	Test	Emp - MN-12-8	16.00	2	2	09/01/2023	09/30/2023		
5002	Test	Emp - NV-12-8	-	-	-	09/01/2023	09/30/2023		
Page Total			83.00	11	11				

f. Click **Approve** button.

Time > Timesheets

← Timesheets (Pending Approval) View Approve Reject

Page 1 of 3 1 - 10 of 29 Rows Current view Timesheet Dates: Last 30 Current Month (1)

	Employee	First Name	Last Name	Raw Hours	# Records	# Unappr...	Timesheet...	Timesheet...	Comment	Default P...	Employee	In Payroll	Approval...
<input checked="" type="checkbox"/>													
<input checked="" type="checkbox"/>	Test005	Test005	Confidential - CA 8 Hours	67.00	11	11	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test004	Test004	Classified Mgmt-MN 8 Hours	60.50	13	13	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test006	Test006	CSEA - ER 4.5 Hours	71.00	18	18	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test007	Test007	CSEA - ER 5 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test008	Test008	CSEA - ER 5.5 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test009	Test009	CSEA - ER 6 Hours	16.00	5	5	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test010	Test010	CSEA - ER 6.5 Hours	43.00	12	12	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test011	Test011	CSEA-RR 5 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test012	Test012	CSEA-RR 6 Hours	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	24.00	5	5	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
Page Total				313.50	68	68							

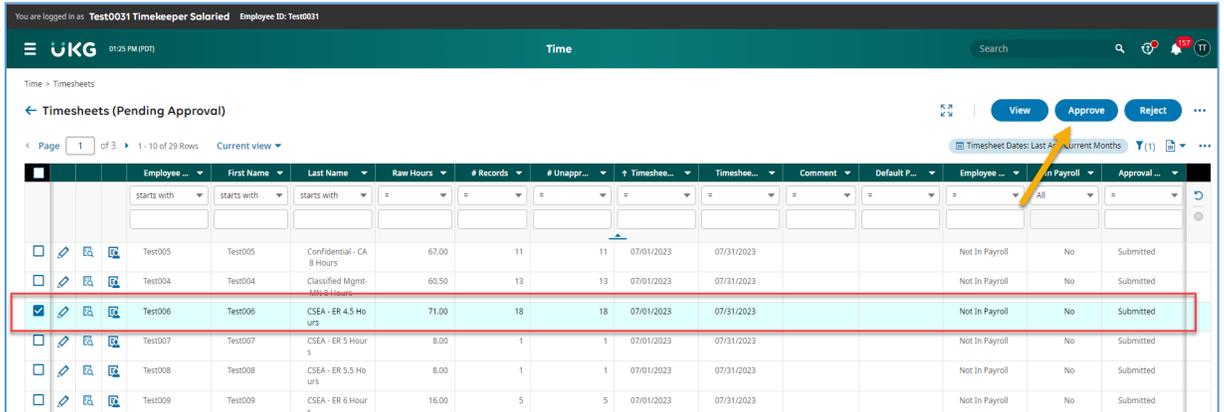
g. The confirmation box appears, and if you are sure to approve the timesheet, click **Approve** button.

**Approve Timesheet(s)?**

You are about to approve timesheet(s). Once timesheet(s) are approved, any further modification would not be allowed.

Comment

- h. In case you only want to approve an individual timesheet, then select the one you want to approve, and click **Approve** button on the far right.



You are logged in as Test0031 Timekeeper Salaried Employee ID: Test0031

Time

Time > Timesheets

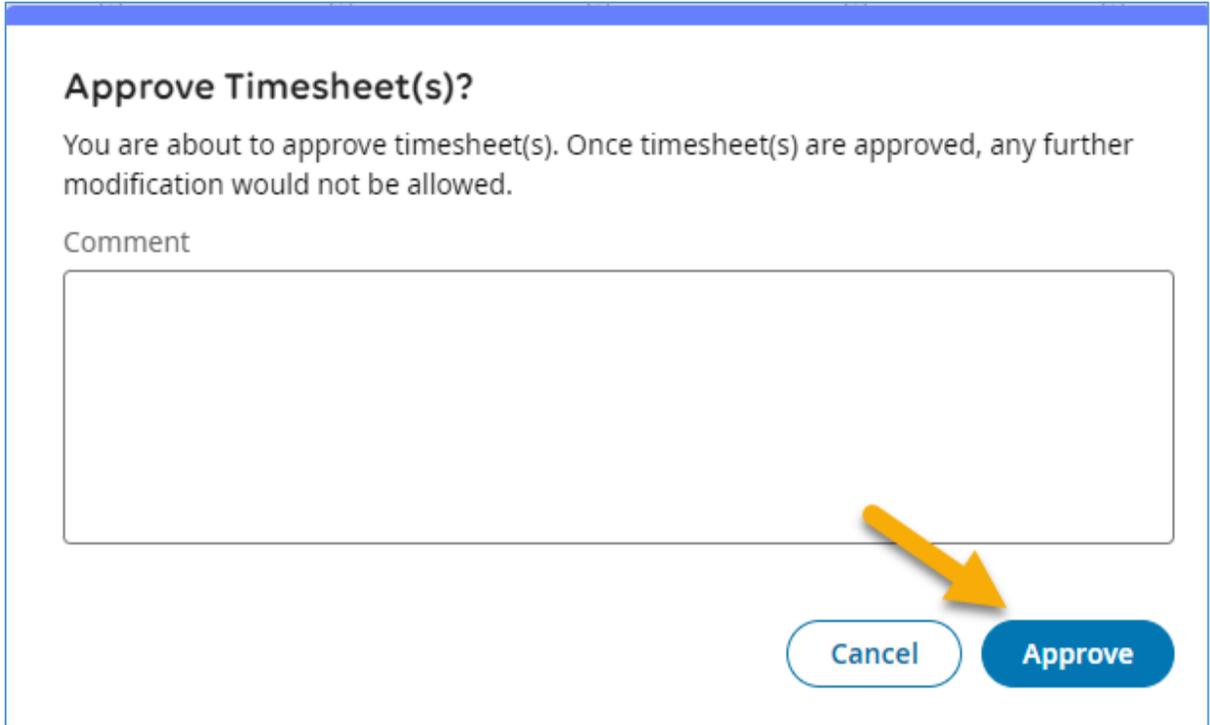
← Timesheets (Pending Approval)

Page 1 of 3 1 - 10 of 29 Rows Current view

Timesheet Dates: Last A... Current Months (1)

	Employee ...	First Name	Last Name	Raw Hours	# Records	# Unappr...	↑ Timeshee...	Timeshee...	Comment	Default P...	Employee ...	In Payroll	Approval ...
	starts with	starts with	starts with	=	=	=	=	=	=	=	=	=	=
<input type="checkbox"/>	Test005	Test005	Confidential - CA 8 Hours	67.00	11	11	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input type="checkbox"/>	Test004	Test004	Classified Mgmt-Marketing	60.50	13	13	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input checked="" type="checkbox"/>	Test006	Test006	CSEA - ER 4.5 Hours	71.00	18	18	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input type="checkbox"/>	Test007	Test007	CSEA - ER 5 Hour s	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input type="checkbox"/>	Test008	Test008	CSEA - ER 5.5 Ho urs	8.00	1	1	07/01/2023	07/31/2023			Not In Payroll	No	Submitted
<input type="checkbox"/>	Test009	Test009	CSEA - ER 6 Hour s	16.00	5	5	07/01/2023	07/31/2023			Not In Payroll	No	Submitted

- i. The confirmation box appears, and if you still want to approve the timesheet, click **Approve** button.



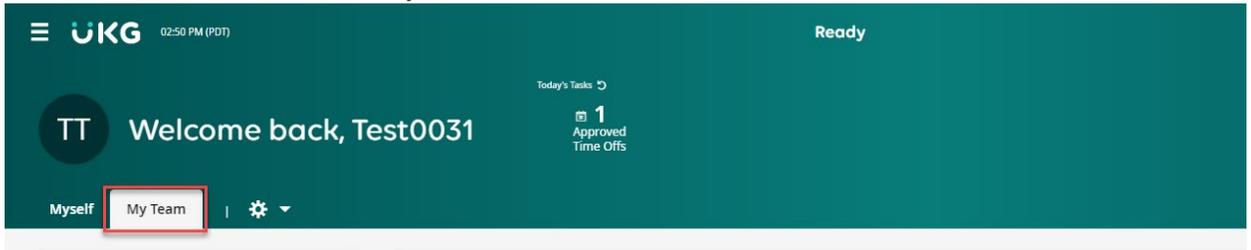
**Approve Timesheet(s)?**

You are about to approve timesheet(s). Once timesheet(s) are approved, any further modification would not be allowed.

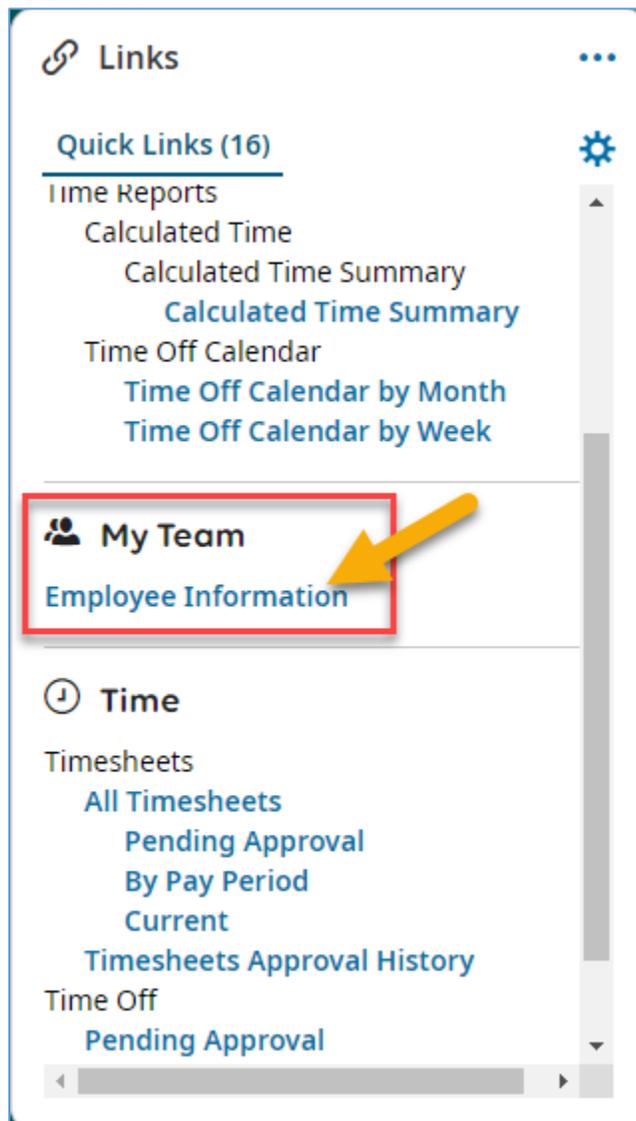
Comment

## 14. Update an Employee's Shift

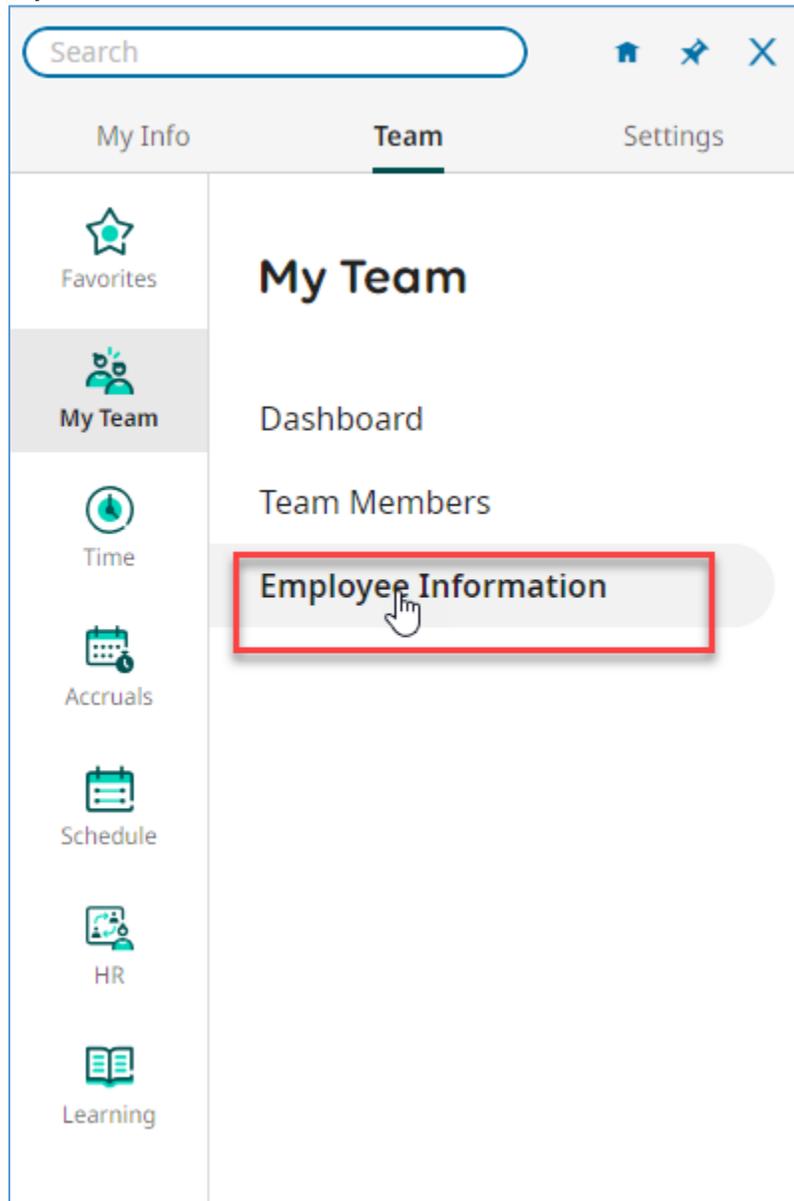
- a. On the Dashboard, click on **My Team** tab.



- b. Scroll down in the **Quick Links** widget and click on *Employee Information* link in the **My Team** section.



- c. Or from the **Main** menu , in the **Team** tab, click on *Employee Information* link under the **My Team** section.



d. The **Employee Information** page shows the list of the employees assigned to you. It might have multiple pages.

	Username	First Name	Last Name	In Payroll	Locked	Employee Status	Supervisor Name	Timekeeper Name	Default Position Full Path
<input type="checkbox"/>	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test003	Test003	Classified Management - MM Exempt	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test004	Test004	Classified Mgmt- MN 8 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test005	Test005	Confidential - CA 8 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test006	Test006	CSEA - ER 4.5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test007	Test007	CSEA - ER 5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test008	Test008	CSEA - ER 5.5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test009	Test009	CSEA - ER 6 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test010	Test010	CSEA - ER 6.5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test011	Test011	CSEA-RR 5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test012	Test012	CSEA-RR 6 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test013	Test013	CSEA-RR 7 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	

e. Click on **Employee Information** button of the employee you want to view.

	Username	First Name	Last Name	In Payroll	Locked	Employee Status	Supervisor Name	Timekeeper Name	Default Position Full Path
<input type="checkbox"/>	Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test003	Test003	Classified Management - MM Exempt	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test004	Test004	Classified Mgmt- MN 8 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test005	Test005	Confidential - CA 8 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test006	Test006	CSEA - ER 4.5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test007	Test007	CSEA - ER 5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test008	Test008	CSEA - ER 5.5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test009	Test009	CSEA - ER 6 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test010	Test010	CSEA - ER 6.5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	
<input type="checkbox"/>	Test011	Test011	CSEA-RR 5 Hours	No	No	Not In Payroll	Test0030 Supervisor Salaried	Test0031 Timekeeper Salaried	

f. Scroll down on the **Employee Information** page to **Work Schedule** section at the bottom right.

**Pay Information**

Employee Type: ..

**Dates**

Employment Length: 2 Years, 6 Months, 30 Days

Years Of Service: 2 Years, 6 Months, 30 Days

Hired: 01/01/2021

Started: 01/01/2021

Review: ..

Seniority: ..

Terminated: ..

**Pay Calculation**

MM - Classified Mgmt - 8 Hr - Exempt

Effective Date: 12/31/1900

**Pay Prep**

Pay Prep: Default

Effective Date: 12/31/1900

**Work Schedule**

Work Schedule: 0800-1630 M 1200-1230

Start Schedule On: Day 1

g. Click the **Browse** button and select the shift the employee wants to change to.

**Browse and Select Work Schedule Profile**

Page 2 of 8 21 - 40 of 152 Rows

Search

	Name	Description
<input type="radio"/>	0700-1530 M 1200-1230	
<input type="radio"/>	0700-1530 M 1215-1245	
<input type="radio"/>	0700-1530 M 1230-1300	
<input type="radio"/>	0700-1530 M 1245-1315	
<input type="radio"/>	0700-1530 M 1300-1330	
<input type="radio"/>	0700-1600 M 1130-1230	
<input type="radio"/>	0700-1600 M 1200-1300	
<input type="radio"/>	0700-1600 M 1230-1330	
<input type="radio"/>	0700-1600 M 1300-1400	
<input type="radio"/>	0700-1730 M 1200-1230 OFF FRIDAY AWS	

Close

h. Click **Save** button at the top right.

**My Team** Search

Utilities Download PDF Save

Account Status

Not In Payroll Add To New Hire Export

Primary Email Secondary Email

Code Work Phone Primary

Code Home Phone Primary

Code Cell Phone Primary

Profiles

Simple Profiles

Access Holiday

Calendar A

Pay Period Points

Salary Monthly

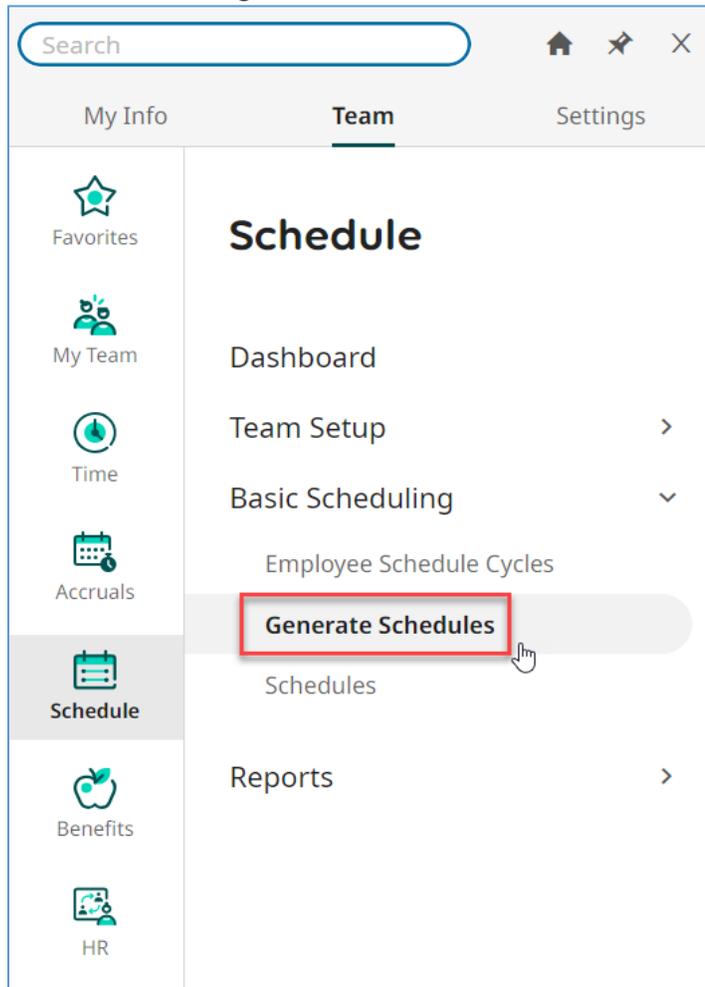
Security Timesheet

Employee Salary - MM

TS Auto Population

Holidays (Standard Work Day)

- i. Next, go to the **Main menu** , in the **Team** tab, click on *Generate Schedules* link under the **Basic Scheduling** section.



- j. Select the employee and then click on **Generate Schedules** button.

Schedule > Basic Scheduling > Generate Schedules

← Generate Schedules 2 Generate Schedules

Page 1 of 3 | 1-30 of 61 Rows Current: [System]

	Employee Id	Badge	Username	First Name	Last Name	In Payroll	Locked	Employee Status	Work Schedule
<input type="checkbox"/>	Test001		Test001	Test001	Cert. Mgt. - MC 10 hrs Fri Off	Yes	No	Active	0630-1700 M 1230-1300 OFF FRIDAY AWS
<input type="checkbox"/>	Test002		Test002	Test002	Class. Mgt. - MM 10 Hours Friday Off	Yes	No	Active	0630-1700 M 1230-1300 OFF FRIDAY AWS
<input checked="" type="checkbox"/>	Test003		Test003	Test003	Classified Management - MM Exempt	No	No	Not In Payroll	0800-1630 M 1200-1230
<input type="checkbox"/>	Test004		Test004	Test004	Classified Mgmt- MN 8 Hours	No	No	Not In Payroll	0430-1300 M 0900-0930
<input type="checkbox"/>	Test005		Test005	Test005	Confidential- CA 8 Hours	No	No	Not In Payroll	0600-1430 M 1200-1230

- k. Specify the *From Date*, *To Date* (required), check the box *Override existing schedule entries* and then click **Generate** button. Please note that you can only generate schedule for a maximum of 2 years from today.

- l. Schedule Generation Result page shows.

- m. Click **OK** button.
- n. Verify shift information on employee's timesheet.

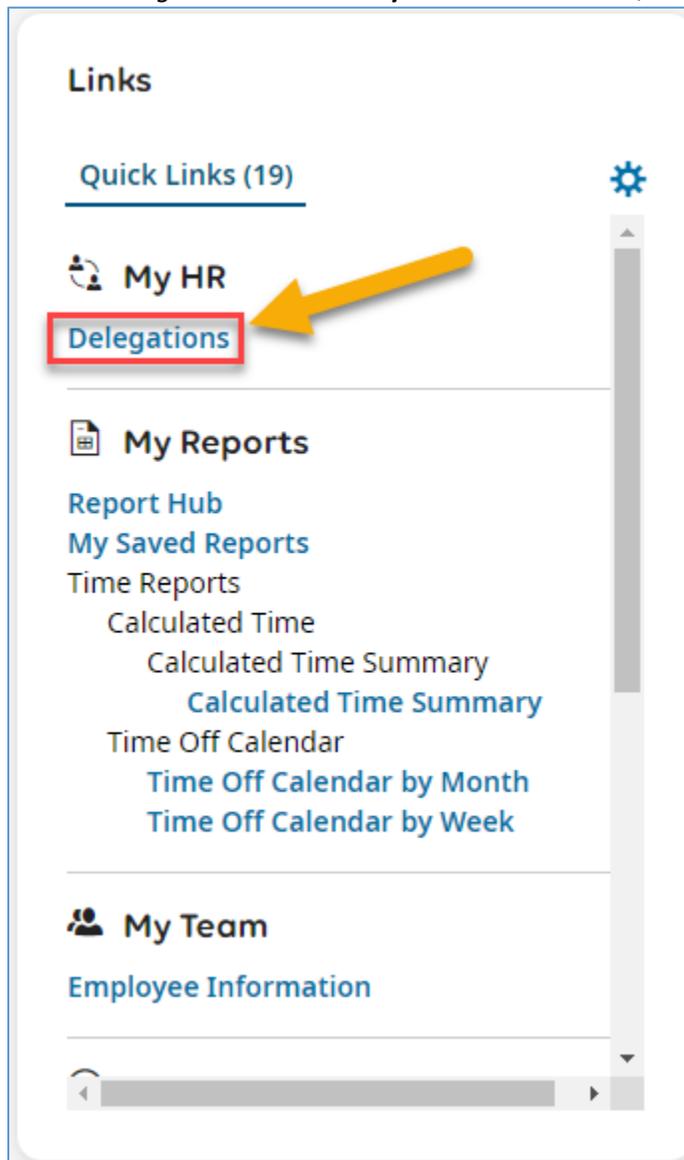
Time Entry								Extra Pay & Counter Adjustment	Exceptions	Calc Detail	Calc Summary	Counters	Summary By
				0.00 hrs	0.00 hrs	0.00 hrs							
				Worked Hours	Time Off Hours	Overtime Hours							
> Date		From	To	Raw Total	Calc. Total	In Date	Time Off						
> SUN Oct 1	+			0.00 hrs	0.00 hrs								
MON Oct 2	...	From am	To am	0.00	0.00	MON Oct 2							
0800-1630 M 1200-1...	+			0.00 hrs	0.00 hrs								

## 15. How to Assign a Delegate

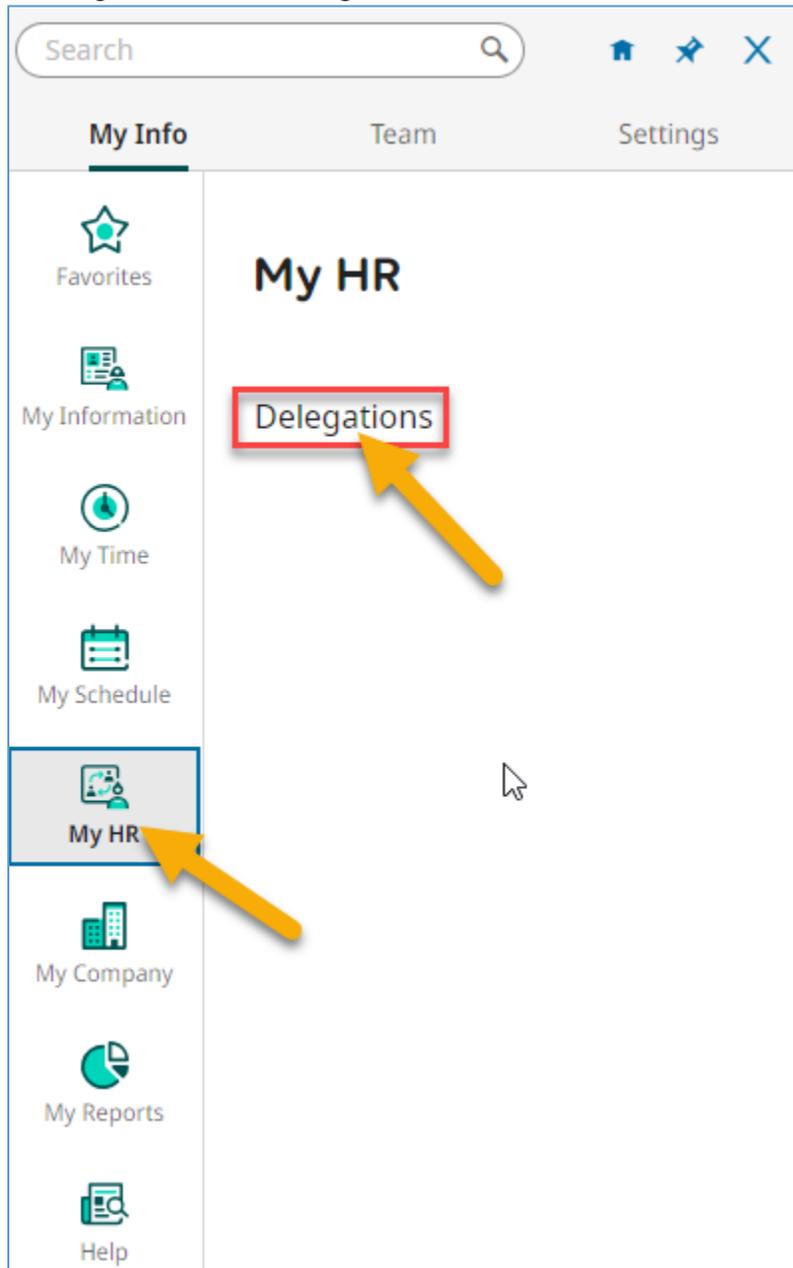
- a. On the Dashboard, click on **My Team** tab.



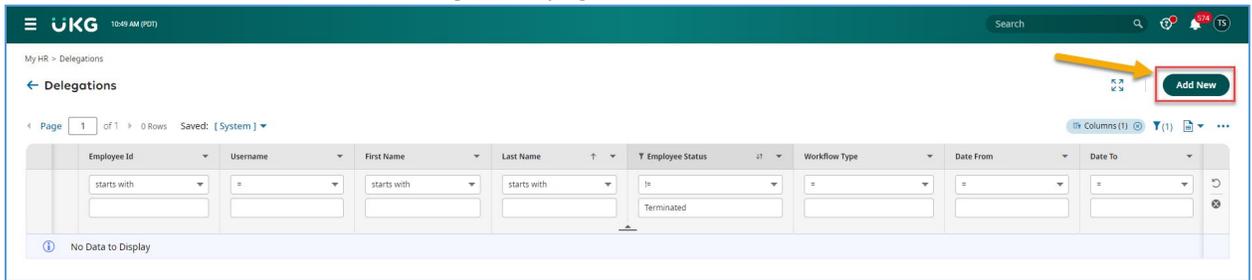
- b. Click on *Delegation* link in the **My HR** section of the **Quick Links** widget.



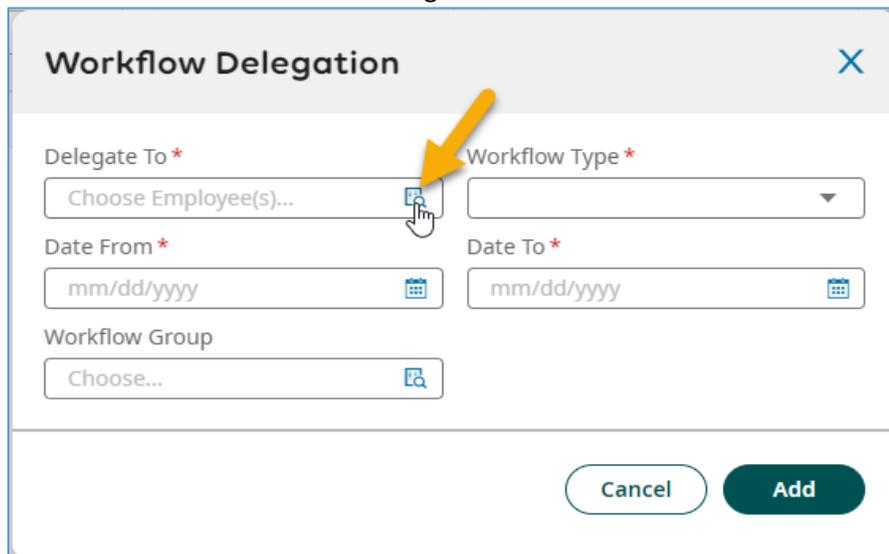
- c. Or from the **Main** menu , in **My Info** tab, hover your mouse over **My HR** tile, then click on *Delegations* link on the right.



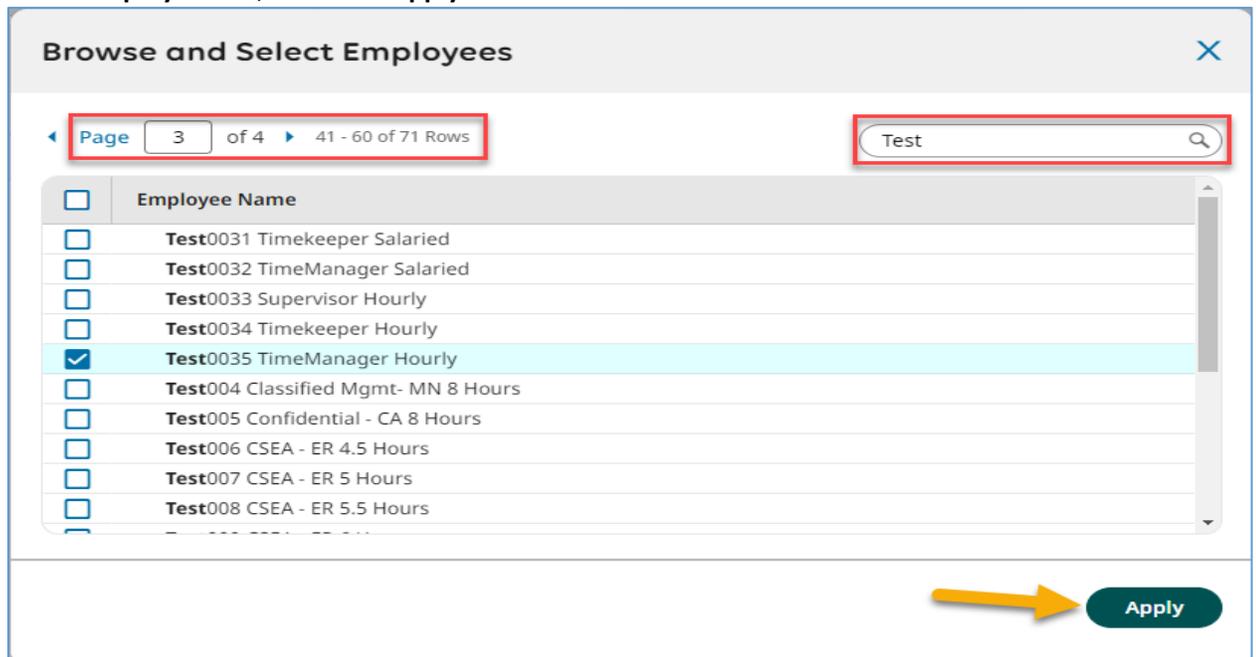
d. Click **Add New** button on the **Delegations** page.



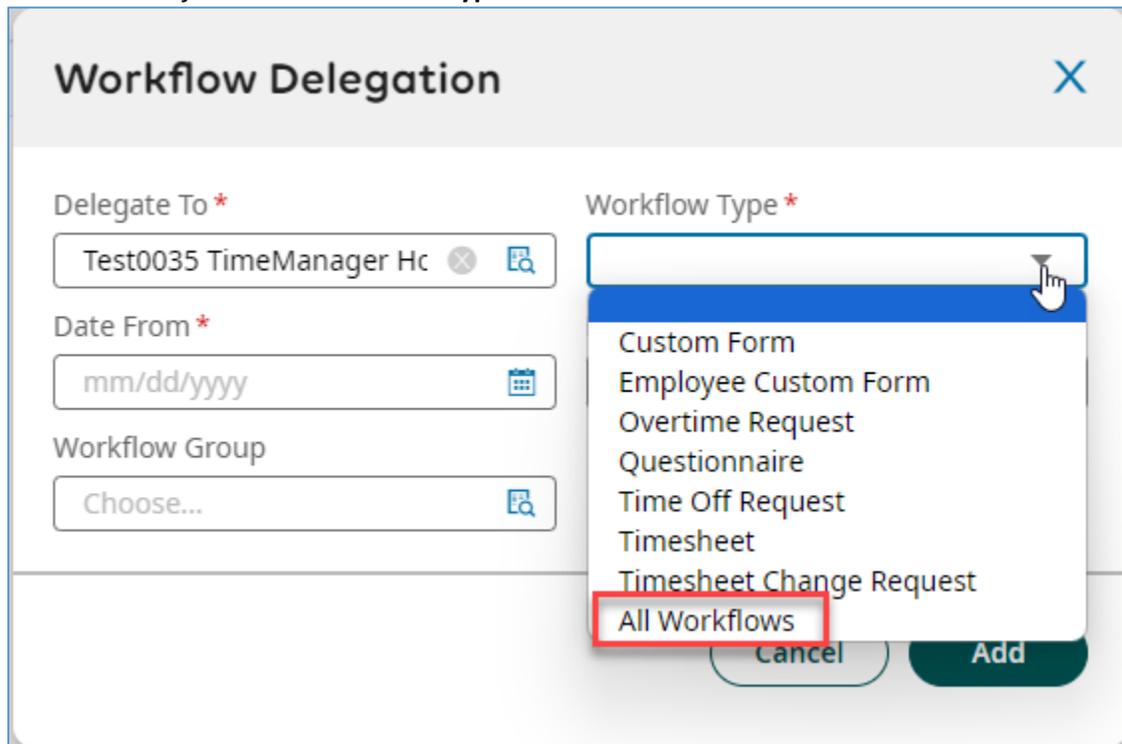
e. Click the **Browse** button in the **Delegate To** box.



f. Search for and select the manager that you want to assign as a delegate from **Browse and Select Employees** list, then click **Apply** button.

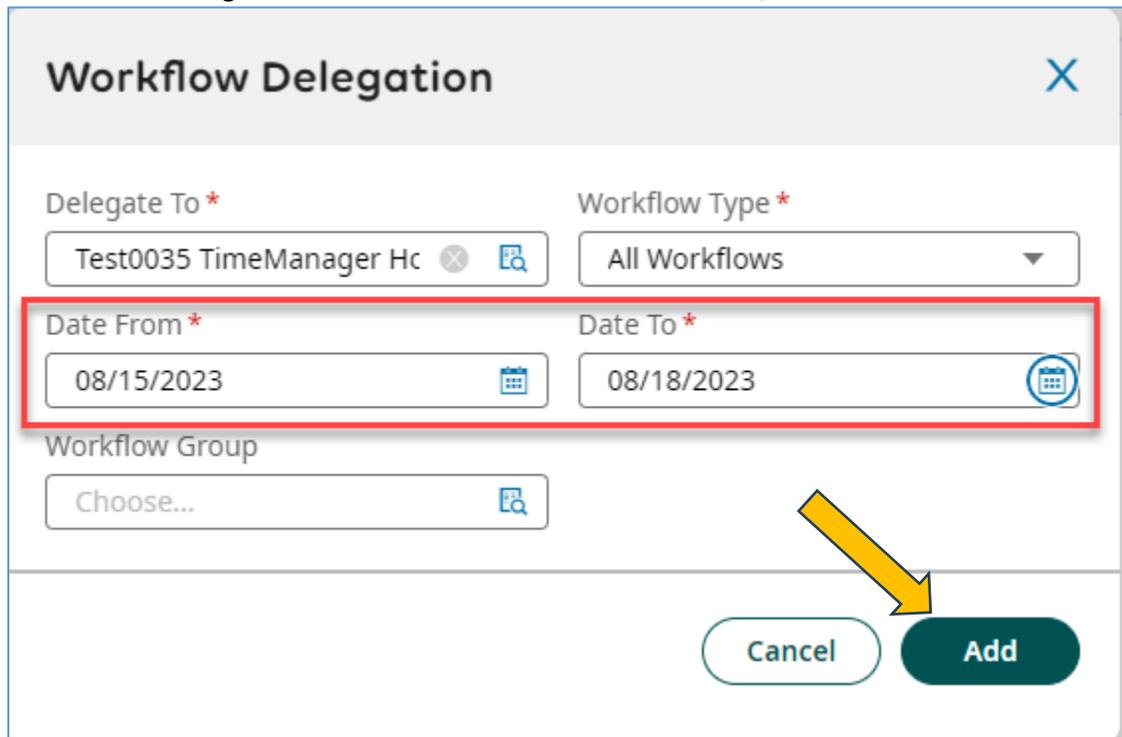


- g. Select *All Workflows* from **Workflow Type** box.



The screenshot shows the 'Workflow Delegation' dialog box. The 'Delegate To' field contains 'Test0035 TimeManager Hc'. The 'Date From' field is empty with a placeholder 'mm/dd/yyyy'. The 'Workflow Group' field is 'Choose...'. The 'Workflow Type' dropdown menu is open, showing a list of options: Custom Form, Employee Custom Form, Overtime Request, Questionnaire, Time Off Request, Timesheet, Timesheet Change Request, and All Workflows. The 'All Workflows' option is highlighted with a red box. The 'Add' button is visible at the bottom right.

- h. Enter the date range in the **Date From** and **Date To** boxes. Then, click **Add** button.



The screenshot shows the 'Workflow Delegation' dialog box. The 'Delegate To' field contains 'Test0035 TimeManager Hc'. The 'Workflow Type' dropdown menu is set to 'All Workflows'. The 'Date From' field is filled with '08/15/2023' and the 'Date To' field is filled with '08/18/2023'. The 'Workflow Group' field is 'Choose...'. The 'Add' button is highlighted with a yellow arrow.

- i. The **Delegations** page shows the workflow delegation, and you have the options to *delete* or *modify* it on the left.

The screenshot shows the UKG Delegations page. The page header includes the UKG logo, the time 11:29 AM (PDT), and a search bar. Below the header, there is a navigation bar with a back arrow, the text 'Delegations', and an 'Add New' button. The main content area features a table with the following columns: Employee Id, Username, First Name, Last Name, Employee Status, Workflow Type, Date From, and Date To. The table contains one row of data with the following values: Employee Id: Test0035, Username: Test0035, First Name: Test0035, Last Name: TimeManager Hourly, Employee Status: Not In Payroll, Workflow Type: All Workflows, Date From: 08/15/2023, and Date To: 08/18/2023. A red box highlights the 'All Workflows' entry in the Workflow Type column. Another red box highlights the edit and delete icons in the left margin of the first row.

	Employee Id	Username	First Name	Last Name	Employee Status	Workflow Type	Date From	Date To
	starts with	*	starts with	starts with	Terminated	*	*	*
 	Test0035	Test0035	Test0035	TimeManager Hourly	Not In Payroll	All Workflows	08/15/2023	08/18/2023