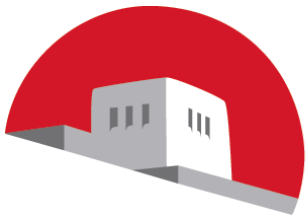

THE UNIVERSITY of NEW MEXICO

LoboTime

Managing Timecards and Schedules for Supervisors and Time Managers

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Getting Started

UNM Confidentiality and Sensitive Information Policies

Your responsibilities regarding the protection and security of administrative information are outlined in the University of New Mexico Policies and Procedures Manual:

- Responsibility and Accountability for Univ Info & Trans — Policy No.2000
- Acceptable Computer Use — Policy No. 2500
- Computer Use Guidelines — Policy No. 2510
- Computer Security Controls and Guidelines. — Policy No. 2520

Use of University computing services in violation of applicable laws or University policy may result in sanctions, including withdrawal of use privilege; disciplinary action up to and including expulsion from the University or discharge from a position; and legal prosecution under applicable federal and/or state law. Your access is granted based on business need and it is your responsibility to ensure the information your access is used appropriately. Here are some reminders of good data stewardship:

- Do not share, disclose or store your passwords in an unsecured manner.
- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Do not leave your workstation unattended while logged in to administrative information systems. You are responsible for any activity that occurs using your password.
- Do not attempt to access accounts, files, or information belonging to others without their knowledge or consent.
- Do not use your computer account to engage in any form of illegal software copying or other copyright infringement.
- Do not use your account to harass other computer users.
- Retrieve printed reports quickly and do not leave the reports visible to others.
- Secure reports containing confidential and sensitive information.
- Shred documents containing confidential or sensitive information in a timely manner.

Business Rules

Monthly Employees (5R) - Exempt employees are “project” employees in LoboTime who record their exception time in LoboTime. No BAR role required. It is recommended as a best practice that exempt employees approve their timecards per their departmental timelines.

- Exception time requires approval from direct supervisor or from a delegated authority.
- Departmental Time must be approved and signed off in the LoboTime system for the Monthly payroll (5R) by 5:00 pm on the 20th of each month, or the first working day after the 20th of the month if this is a non-business day. Time approval and sign offs to payroll after 5:01pm will not be reported until the following pay period.

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Biweekly Employees (2R) – Non-exempt employees will be using either a PC and/or a LoboTime clock to enter time and leave. No BAR role required. Employees are strongly encouraged to approve timecard.

- Departmental Time must be approved and signed off in the LoboTime system for the Biweekly payroll (2R) period by 5:00 p.m. on the Monday after the pay period ends. Time approval and sign offs to payroll will be locked at 5:01pm.
- Monday, 5:01pm – Thursday, 8:00am, Payroll will run.
- Comp Time earned in a pay period cannot be taken in the same pay period.
- You cannot be paid for overtime or compensatory time @1.5 in the same week you have taken paid leave.

Student Employees (2R) – same rules apply for Student Employees as for Biweekly

- Time entered in 'hour in tenths' (6 min increments).
- While classes are in-session (this includes Fall and Spring breaks) students are allowed to work a maximum of 28 hours per week. While classes are not in-session (during Winter break and when not enrolled during the summer) students are not to exceed 40 hours per week.Importance and Benefits of LoboTime

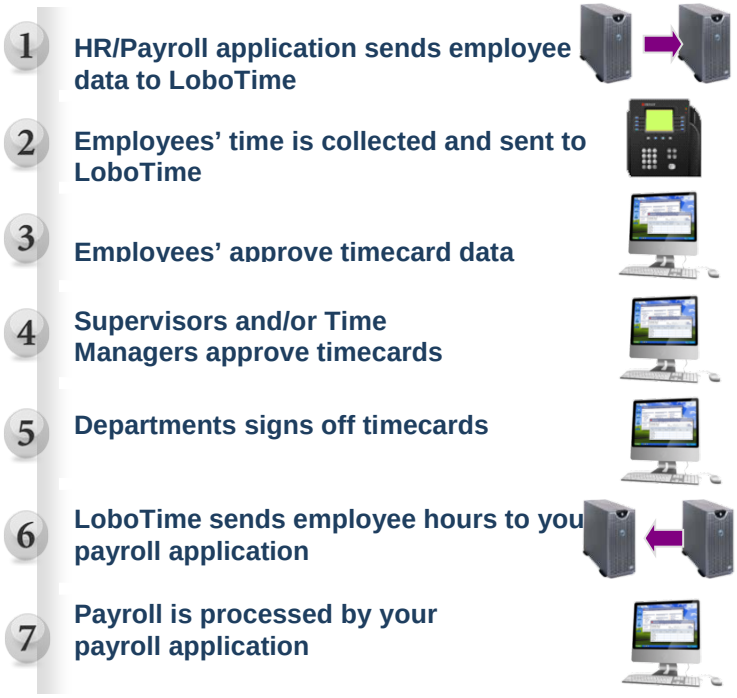
Purpose

It is important that your employees are compensated accurately. To make this happen, you need to manage employees' worked and non-worked hours, as well as attendance issues, in an efficient and timely manner. The application supports your ability to perform these tasks so that the data sent to payroll is accurate.

The Payroll Process

Purpose

LoboTime automates the payroll process, ensuring that the payroll is processed accurately and on time.



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Roles and Responsibilities

Purpose

Each employee, supervisor or time manager has responsibilities that are important in the payroll process. Each person's role determines his or her responsibilities and the tasks that he or she performs in the application.

Common Non-Exempt Employee Tasks

On a daily basis, employees perform the following tasks:

- Enter time data using a LoboTime clock (terminal) and/or via a computer
- Approve time
- Submit requests for future time off

Common Exempt Employee Tasks

On a daily basis, employees perform the following tasks:

- Submit requests for future time off
- Review timecard for accuracy

Common Supervisor or Time Manager Tasks

On a daily basis, Supervisor or Time Managers perform the following tasks:

- Check for missing punches or other exceptions and add comments
- Add missing punches
- Enter and edit schedules

On a pay-period or as-needed basis, Supervisor or Time Managers perform the following tasks:

- Monitor timecards to facilitate payroll processing
- Review timecards for completeness and apply approvals
- Run reports

Business practice

Views are based on roles:

Time Manager = See multiple supervisors and all employees based on Org's

Supervisor = See employees for whom they are Supervisor of Record in Banner

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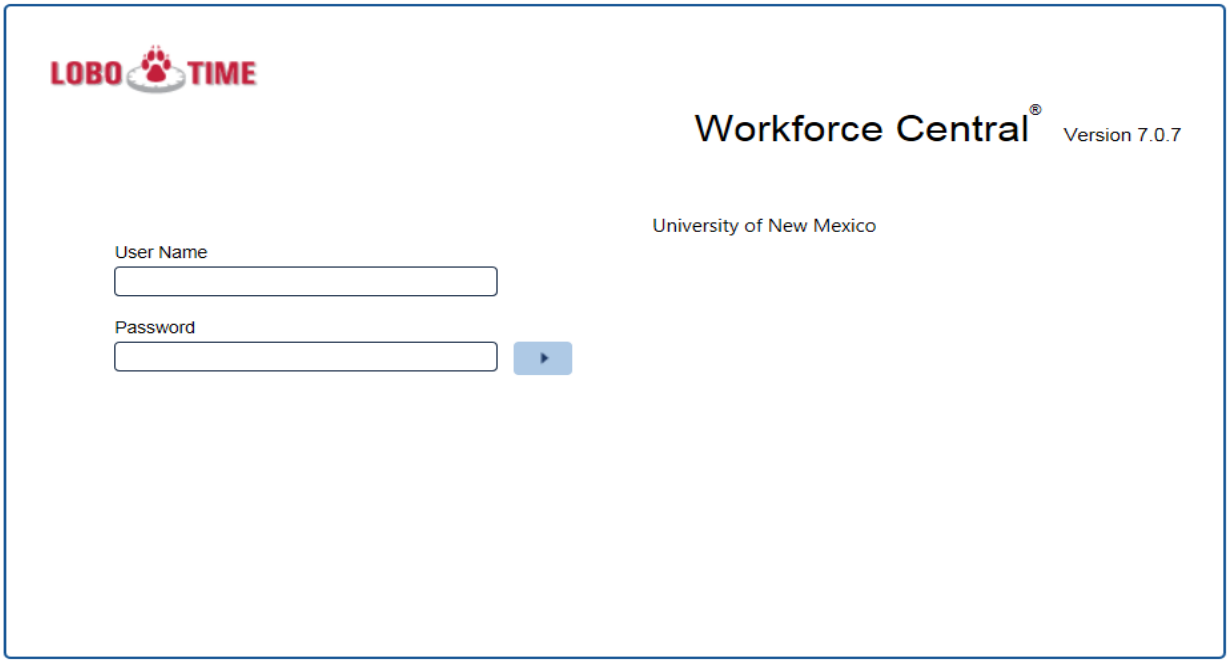
Logging On

Purpose

The LoboTime log on page provides access to all the features of the application where you perform your time and attendance tasks.

Example

You, as the department Supervisor or Time Manager, log on to LoboTime at least once a day to review and work with your employees' timecards and scheduling data.



Steps	
1	Access the LoboTime log on page.
2	Enter your NETID and NETID password in their designated fields.
3	Select the blue arrow button or press the **Enter** key on the keyboard.

Note

Passwords may be case sensitive.

If you or an employee using LoboTime forgets the user name or password, go to https://netid.unm.edu/ for issues regarding your netid or password.

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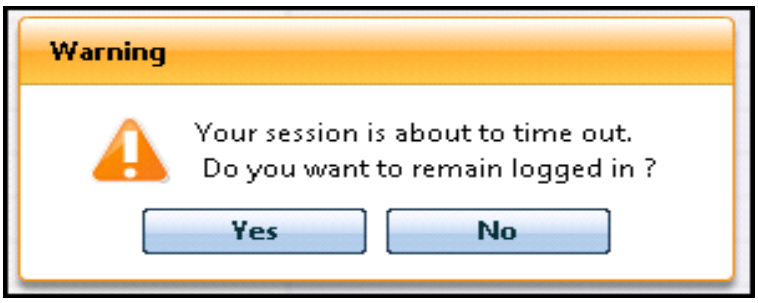
Inactivity Timeout and Signing Out

Purpose

LoboTime provides security to prevent other people from accessing your information. It also helps keep your employees' information confidential.

Regaining access after the inactivity timeout

Inactivity timeout protects sensitive information in the application. If the application does not detect activity within a specific amount of time, it attempts to automatically log you off. To regain access to the application, you must select Yes when asked to remain logged in. When you regain access, the application restores the last page you were viewing.



Business practice

The inactivity timeout screen appears if there is no activity for 15 minutes.

Caution

If you do not select Yes after receiving the inactivity timeout, you are logged out of the application. You will lose all unsaved edits.

Signing Out of LoboTime

Upon completion of your tasks, you must sign out of LoboTime to ensure that your employees' information remains confidential.

Caution

Selecting the Close (X) button without first signing out can leave your connection to the application open, which might allow unauthorized people to view and edit information.

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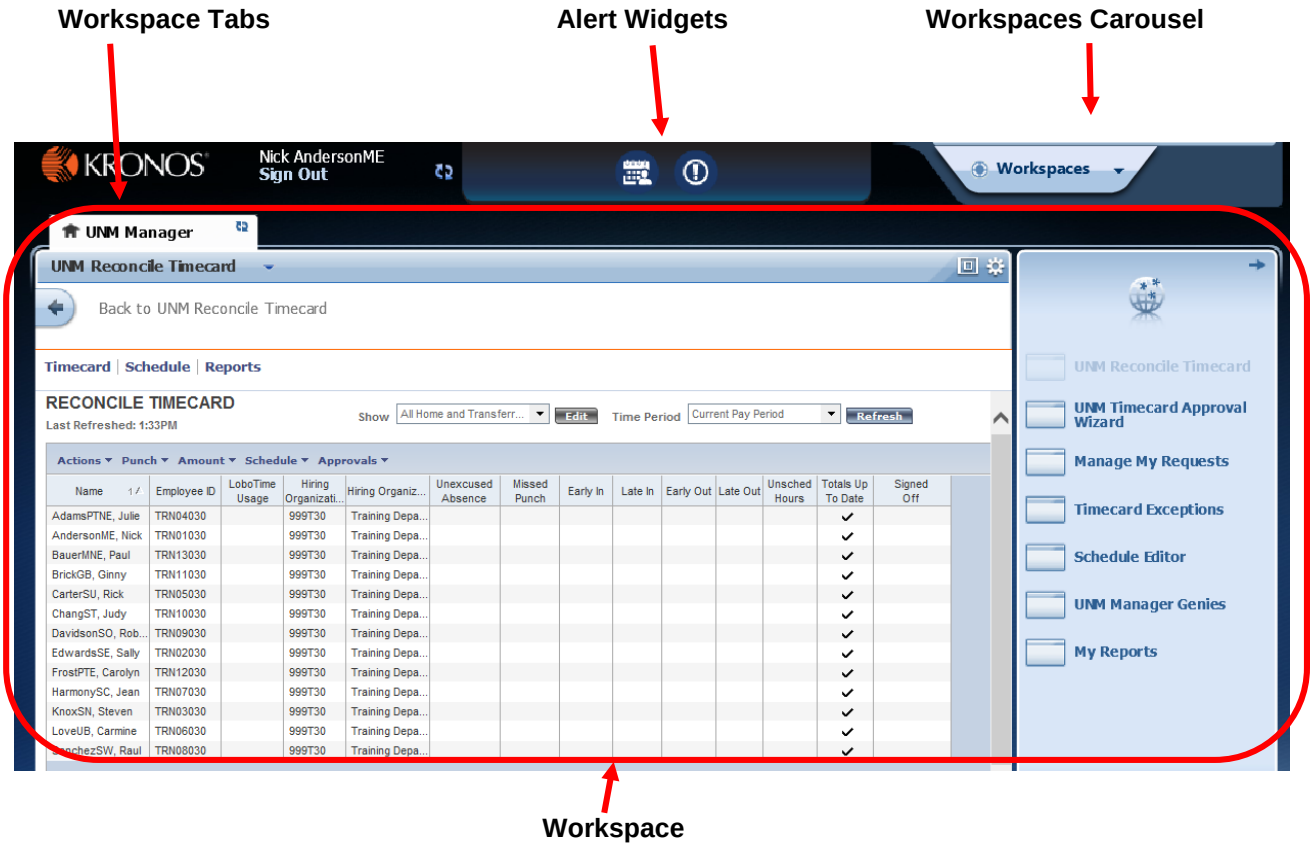
Key Parts of the Navigator

Purpose

After you log on to LoboTime, your Navigator appears. The Navigator is a customized view of the time and labor information that is important to completing your daily work tasks. The Navigator is designed to be simple and intuitive with easy-to-use views. You should take a few minutes to get acquainted with its navigation features.

Navigator Components

Navigator consists of four main components: Alerts, Workspace, Workspaces Carousel, Workspace Tabs



Navigator Component	Description
Alerts	A navigator can contain one or more alerts configured to notify you when specific events or conditions occur. Because the alerts always appear in your navigator, you'll know immediately if something requires your attention.
Workspace	A navigator can contain one or more workspaces. A workspace is a layout designed to accommodate a specific business need. If a navigator has more than one workspace, one will be configured as the default or "home" workspace.
Workspaces carousel	If a Supervisor or Time Manager's navigator is configured to include more than one workspace, all workspaces other than the home workspace are listed in the Workspaces carousel. You can display additional workspaces in your navigator by selecting them in the Workspaces carousel.

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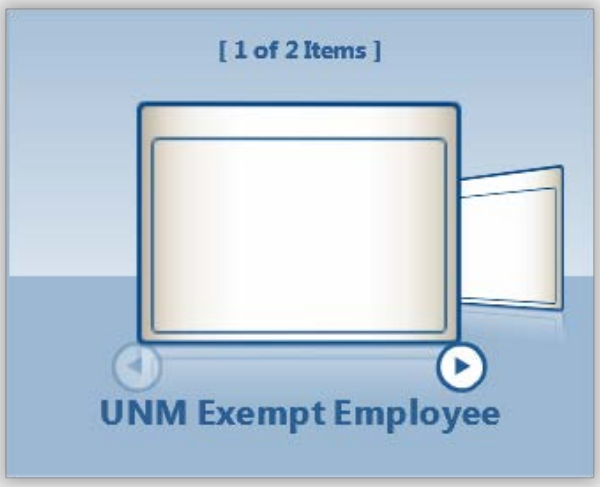
Navigator Component	Description
Workspace tabs	When a workspace is displayed in the navigator, it will have an associated tab. You can use the workspace tabs to switch between or to close displayed workspaces.

Tip

LoboTime is a browser-based application. However, you should not use the browser's navigation controls—the Back button on the toolbar, for example. Only use the links inside of LoboTime to do your work.

Selecting a Workspace to Display

If your navigator is configured to provide more than one workspace, select which workspaces to display.

Steps		
1	To open the Workspaces carousel, select the **Workspaces** tab.	
2	Select the arrows to rotate through the available workspaces.	
3	To select a workspace, select it. **Note:** To close the Workspaces carousel without selecting a workspace, select the **Workspaces** tab again.	

The selected workspace opens and a tab for the workspace is added. The Workspaces carousel closes.

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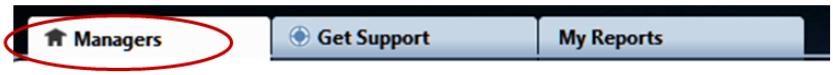
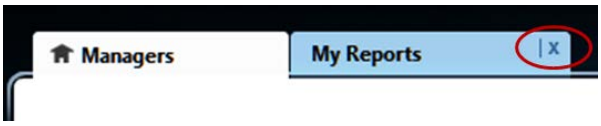
Switching between workspaces

After selecting workspaces from workspace carousel, you can switch to a different workspace by selecting the associated tab. Note that your home workspace will be indicated by a in the tab.



Closing a workspace

To close a workspace and return it to the carousel, hover the cursor over the workspace's tab and select **X**.

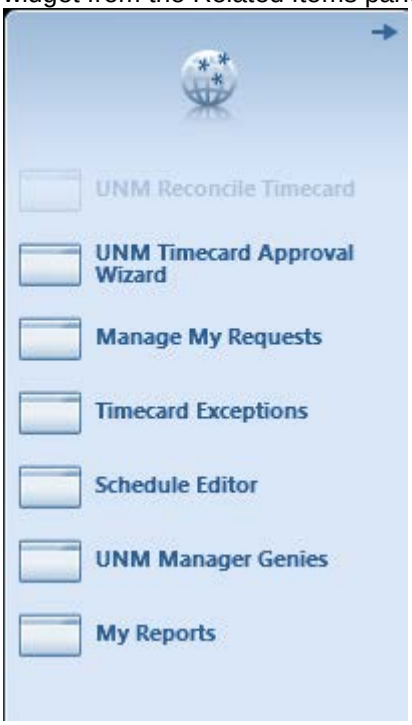


Refreshing a tab

You can refresh the data on a single tab by selecting

The Related Items pane

Select the arrow in the upper right corner to minimize and maximize the Related Items pane. To retrieve a widget from the Related Items pane,select the item and it will open in the main Workspace.



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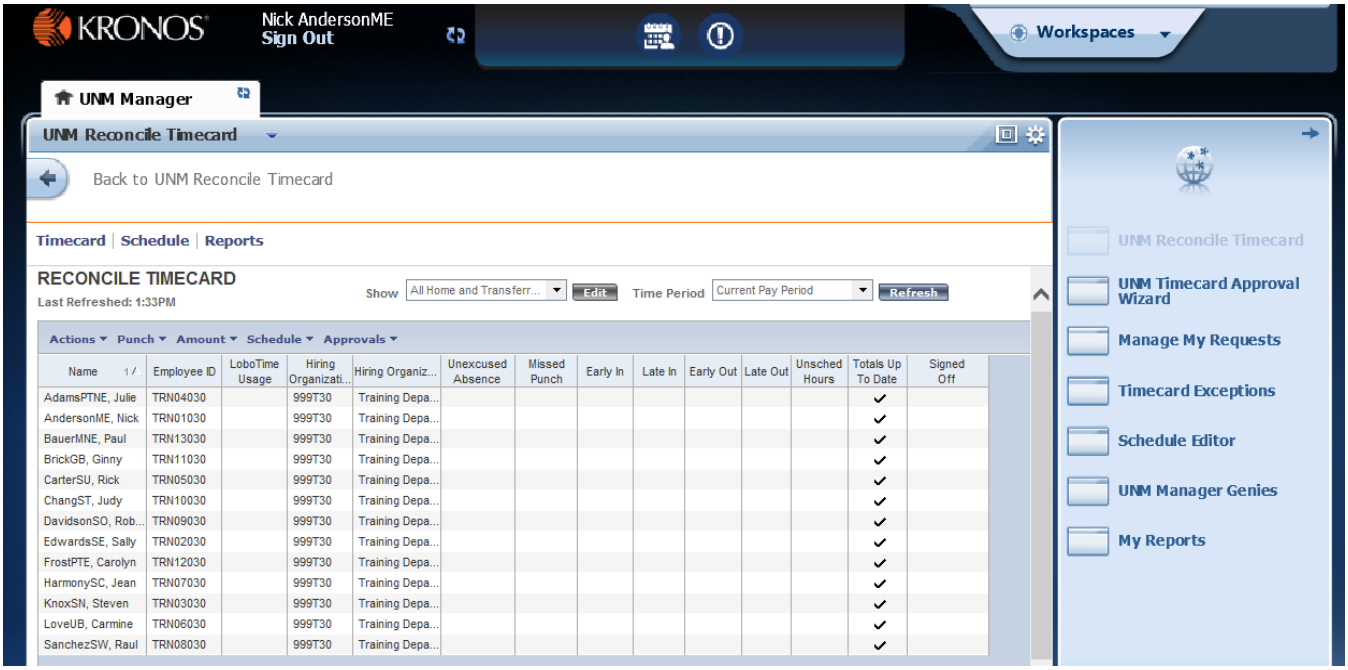
Navigating Widgets

Purpose

LoboTime pages allow you to perform less common or more complex tasks. You can use widgets in LoboTime to complete these tasks.

The key areas of LoboTime widgets

Widgets contain three main areas: search tools, the action bar, and the workspace.



Areas	Description
Search tools	Include: • Show field where you can select a specific set of employees • Time Period field where you select the timeframe for which you want to view schedules and timecard data
Action bar	Allows you to perform tasks to selected employees such as editing punches, approving timecards, and other common tasks
Workspace	Work area contains detailed information about the employees in the selected time period, as well as the action bar, which contains selections for modifying data

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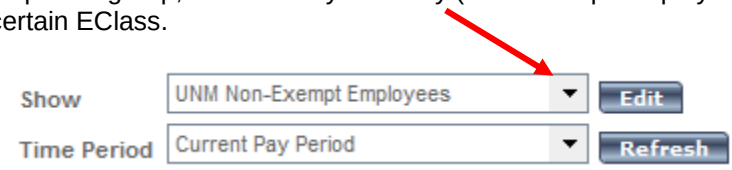
Using the tools within a widget

The Show field allows you to display a group of employees. The default setting for the Show field when you log on is “All Home and Transferred-in”, which displays all employees that report to you or are within the Org’s you specified within your LoboTime BAR role.

You can use the Show field drop down selections to further refine your selection to include employees in a specific group, such as only biweekly (Non-Exempt Employees) or those employees that are within a certain EClass.



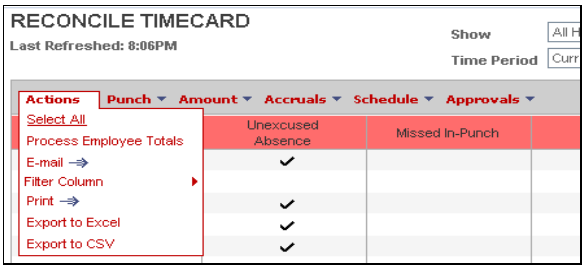
The Time Period field allows you to set the timeframe you want to view, such as the current pay period or a particular timeframe in the past. The time period you select determines what you will see on that page.

Note

Time Period defaults vary depending on the widget you are using. Current, Previous or Next Pay Period views depend on the type of employee you are viewing.

- If you are viewing a biweekly employee you will see an hourly timecard with the two week pay period you have selected.
- If you are viewing a monthly employee you will see a project timecard with the month pay period you selected.
- You can also select a Range of Dates, which will restrict the view of all employees selected to the dates selected.
- See page 57 for “Termianted” empoyees business process.

The Action Bar contains tasks that you can perform on the page. Each Action Bar is specific to the page that you are currently viewing.



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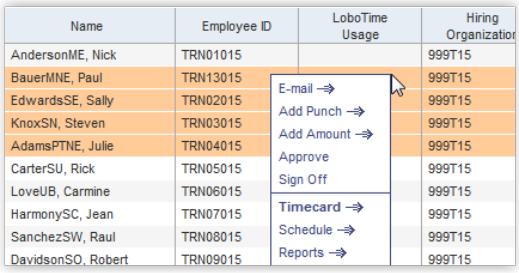
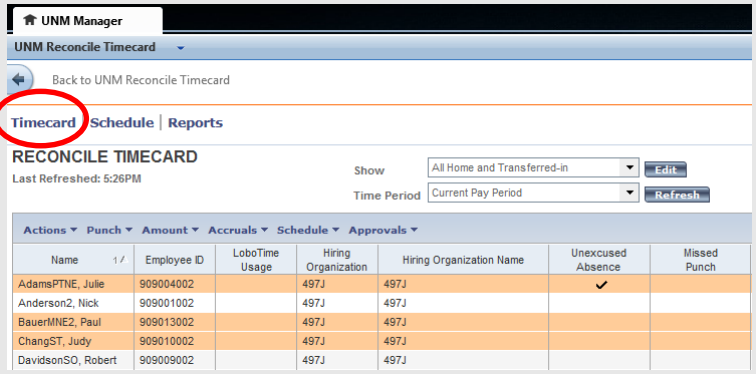
Using the shortcut menu

When one or more employee records are selected, you can right-select to display a shortcut menu. From the menu, you can quickly access four key tools:

- Timecard
- Schedule
- Reports



Tool	Description
Timecard	Launches the timecard(s) for the selected employee(s).
Schedule	Launches the Schedule Editor for the selected employee(s). The Schedule Editor is used to view and update employee schedules.
Reports	Launches the Reports workspace. If you run a report, it will contain information only for the selected employee(s).

Steps		
1	In the workspace area, highlight the employees for whom you need to access data.	
2	Which system component do you want to access? • To access timecards for the selected employees, right-select and then select **Timecard** • To access the Schedule Editor for the selected employees, right-select and then select **Schedule** • To access the Reports for the selected employees, right-select and then select **Reports**	

Tip

There are various ways to select employees:

- Use the Ctrl key to select more than one employee not listed next to each other
- Use the Shift key to select all employees listed between two employees, including the two employees
- Select and drag the mouse to select employees

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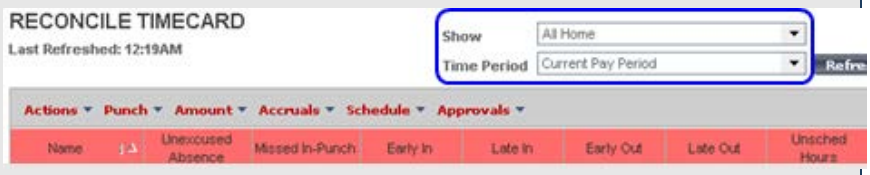
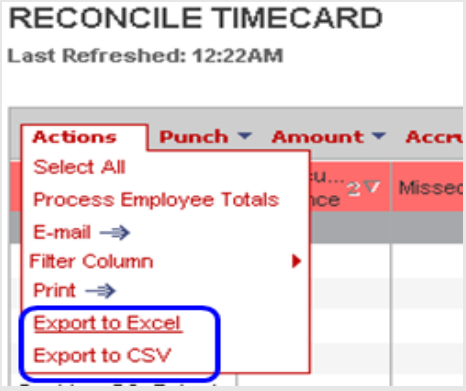
Reviewing Employee Data in LoboTime

Purpose

LoboTime pages present customized views of employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to time, labor, scheduling, and attendance needs. The data is displayed for employees with hourly and exempt timecards.

Example

You want to look for all employees who have unexcused absences in the current pay period. Use Reconcile Timecard to perform this task.

Steps		
1	From **Reconcile Timecard** Widget from the Manager Workspace	
2	Select the specific set of employees from the **Show** drop-down list.	
3	Select the specific time period from the **Time Period** drop-down list.	
4	To sort information by one or two columns, select the column for the secondary sort first, and then select the column for the primary sort.	
5	Review the information in the **Reconcile Timecard** widget.	

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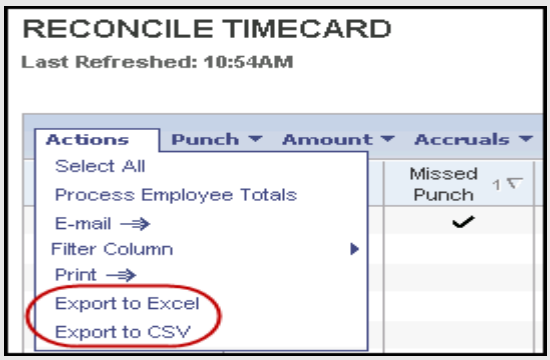
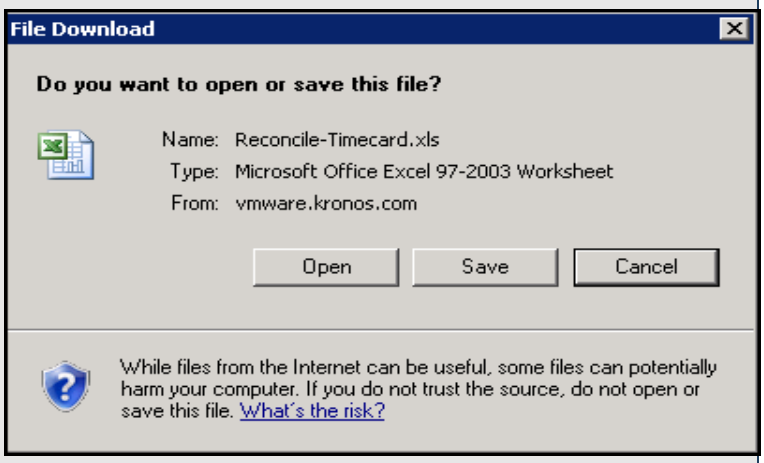
Exporting Data from LoboTime

Purpose

LoboTime pages display critical information in an easy-to-read format. You can export this information to other applications, such as Microsoft Excel, where you can analyze and reformat the data. For example, you can save labor information in the Reconcile Timecard widget as an Excel file and then open it with Microsoft Excel to summarize the data in each column. You can also export the data to a CSV (Comma Separated Value) file to make it available to other applications such as Lotus 1-2-3.

Example

On a regular basis, you export timecard data to Microsoft Excel to perform further data analysis.

Step		
1	From the **Related Items** pane, select a LoboTime widget, such as **Reconcile Timecard**.	
2	Select **Actions > Export**.	
3	Choose the export option: **Excel or CSV**.	
4	In the File Download dialog box, select **Open** to review the data.	
5	(Optional) Select **Save**. Then, in the **Save As** dialog box, select a location for the file and select **Save**. You can review the data by opening the file from its new location.	

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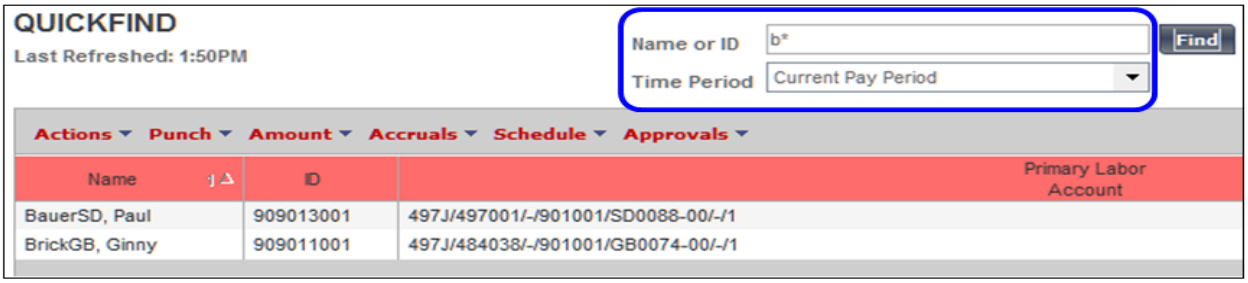
Locating Employees using QuickFind

Purpose

When an employee notifies you about an issue with their timecard, use the QuickFind widget to access their timecard. You can use other LoboTime widgets to access timecards, but this page is designed to help you locate an employee by their name or ID. If you are unsure of the spelling of an employee's name or know only some of the digits in an employee's ID number, you can include wildcard characters to help you find the employee with only partial information.

Wildcard Character	Description	Example
? _	A question mark or underline character indicates a single character occupies a position in the search string.	**07??** finds all employees whose ID contains 4-digit numbers starting with 07. **Sm_th** finds all employees whose last name starts with "Sm" and ends with "th" and has one letter in the center.
* %	An asterisk character or a percent symbol indicates multiple characters can occupy a position in the search string.	***, s*** finds all employees whose first name begins with the letter S. **%1** finds all employees whose ID number ends with the number 1.



Example

You need to edit the timecard for Ginny BrickGB because she forgot to clock in when she arrived to work this morning. To quickly access Ginny's timecard, access QuickFind and search for all employees whose last name begins with "B". Then select Ginny from the list.

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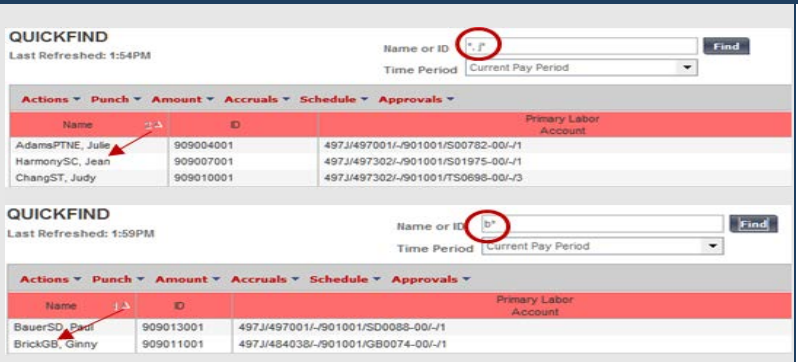
Steps		
1	Access **QuickFind**.	
2	Enter your search criteria in the **Name or ID** box. To search by first name, enter *,<space> j*. To search by last name, enter s*.	
3	Select **Find.**	

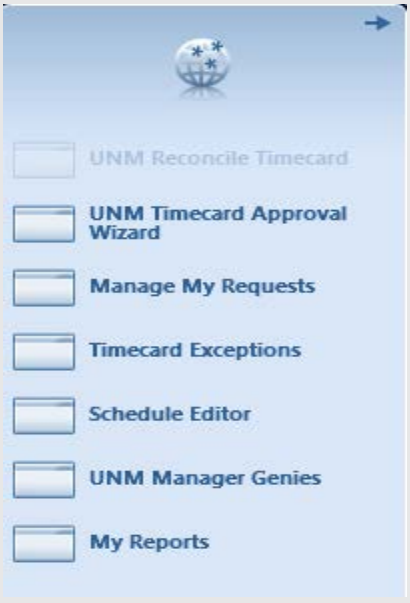
Generating Reports

Purpose

You can generate reports on a daily, weekly, or pay period basis, or any time you need information to accomplish your business tasks.

Example

For auditing and validation purposes, you want to review all pay code data and totals that have been tracked for employees in department/organization for the previous pay period. Generate an Employee Transactions and Totals report to review this information.

Steps		
1	From the **Related Items** pane, select **Reports**. **Note:** The **Reports** widget could be in your workspace, in the Related Items pane or on a Quick Link widget	

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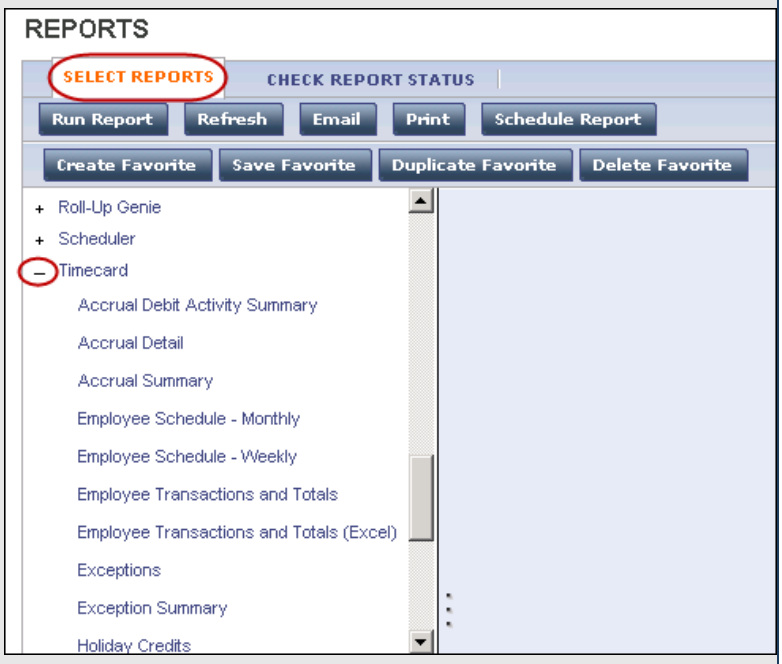
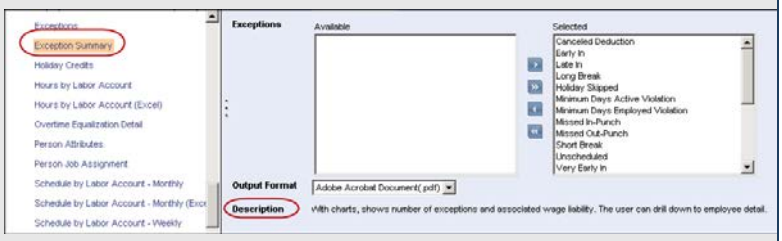
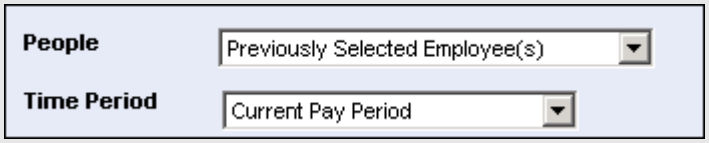
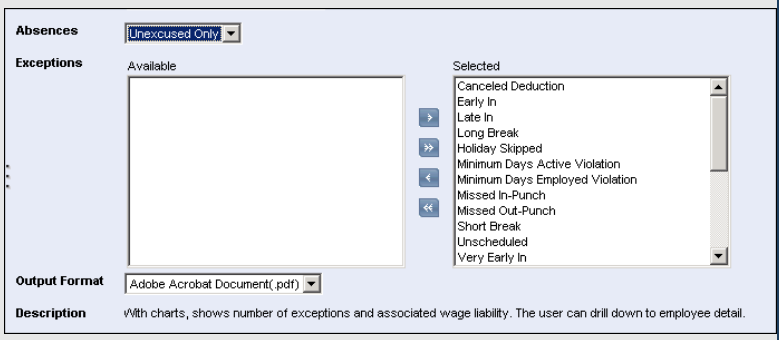
Steps		
2	On the **Select Report** tab, select the plus **(+)** to display a category's contents.	
3	Select a report name. **Note:** The report's description appears at the bottom of the page.	
4	Select the specific time employees from the **People** drop-down list.	
5	Select the specific time period from the **Time Period** drop-down list.	
6	Select one or more available options to identify the report information you need. **Note:** Options can vary by report.	

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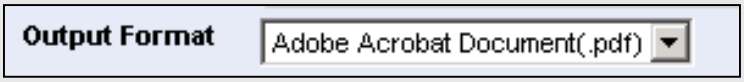
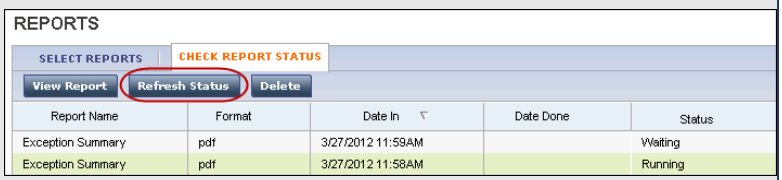
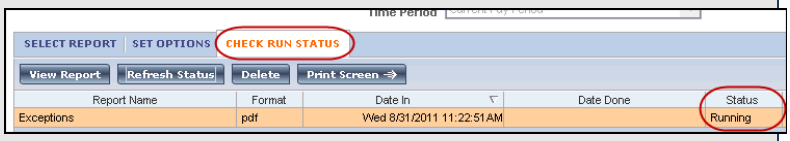
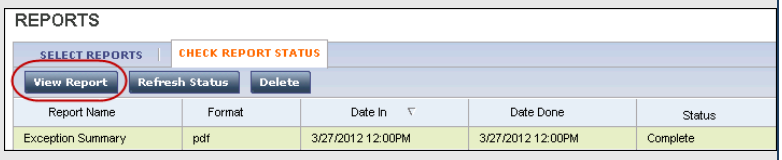
Steps		
7	Select an **Output Format**. **Note**: Reports that have (Excel) at the end of their names allow you to run the report in **Microsoft Excel Document (.xls)** format. All other reports can only be run in **Adobe Acrobat Document (.pdf)** format.	
8	What do you want to do with the report? • To generate a report, select **Run Report**.	
9	If you select Run Report, you are brought to the **Check Run Status** tab. Select **Refresh Status.** The **Status** column displays **Complete** or **Failed** once the application has finished the report.	 
10	To view a report, select a report name to highlight it and do any of the following: • To use menu options, select **View Report** • To use mouse options, double-select the report name	
11	(Optional) While viewing the report, you can do any of the following: • To print the report to a local printer, select **File** > **Print** and then select a printer from the list. • To send a report in an e-mail message, select **File** > **Send** > **Page by E-mail** and complete the e-mail message contained in your default e-mail client.	

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Here is an example of an Exceptions report:

Exceptions

Data Up to Date: 6/3/2012 7:19:16 PM
Executed on: 6/03/2012 7:18PM GMT-04:00
Printed for: fclark

Time Period: Current Pay Period
Query: All Home
Exceptions: (24): |Canceled Deduction|Early In|Late In|Long Break|Holiday Skipped|Minimum Days Active Violation|Minimum Days Employed Violation|Missed In-Punch|...
Absences: Unexcused Only

Exception Day/Date	Exception	Scheduled	Actual or Pay Code	Amount	Amount Over Exception
Comment					
Adams, Julie	ID: 1				
Mon 5/28/2012	Early In	5/28/2012 9:00:00 AM	5/28/2012 8:45:00 AM	0:15	0:07
	Early Out	5/28/2012 2:00:00 PM	5/28/2012 1:50:00 PM	0:10	0:02
Tue 5/29/2012	Unexcused Absence				
Wed 5/30/2012	Unexcused Absence				
Thu 5/31/2012	Unexcused Absence				

Exception	Total	Total Amount Over Exception
Early In:	1	0:07
Early Out:	1	0:02
Unexcused Absence:	3	N/A

Aguirre, Raymond	ID: 4				
Mon 5/28/2012	Unexcused Absence				
Tue 5/29/2012	Unexcused Absence				
Wed 5/30/2012	Unexcused Absence				
Thu 5/31/2012	Unexcused Absence				
Fri 6/1/2012	Unexcused Absence				

Exception	Total	Total Amount Over Exception
Unexcused Absence:	5	N/A

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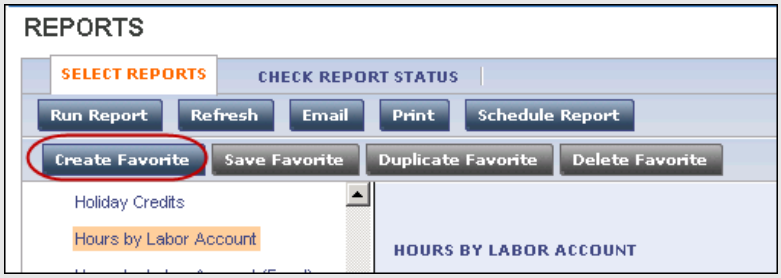
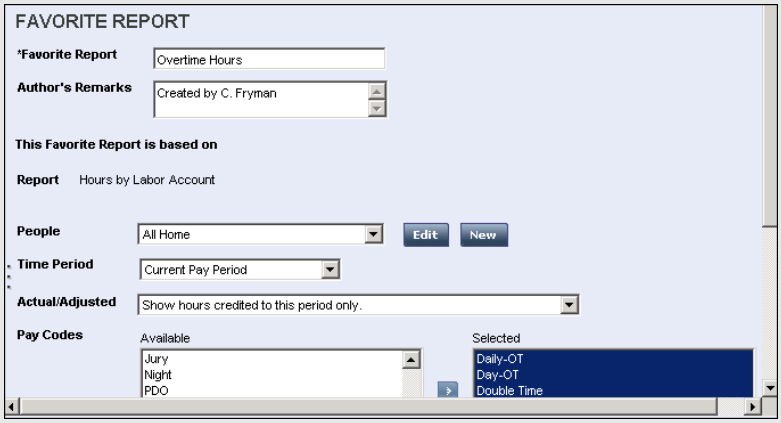
Setting Up Report Favorites

If you run the same report with the same options regularly, you can set up the report as a favorite. You can then run the report as needed without having to reset your options. Favorites appear as a new category at the top of the list.

Steps		
1	Select the report you want to designate as a favorite.	
2	Select **Create Favorite**.	
3	In the **Favorite Report** field, enter a name for the report that has meaning for you.	
4	In the **Author's Remarks** field, enter descriptive data.	
5	Select the options that you would like to see in the report. **Note:** Options can vary by report.	
6	Select **Save Favorite**.	
7	Confirm that the report is displayed in the **Favorites** category.	

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Steps

Editing Time and Attendance Data

Accessing Employees' Timecards

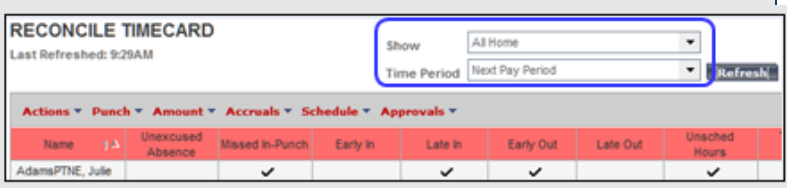
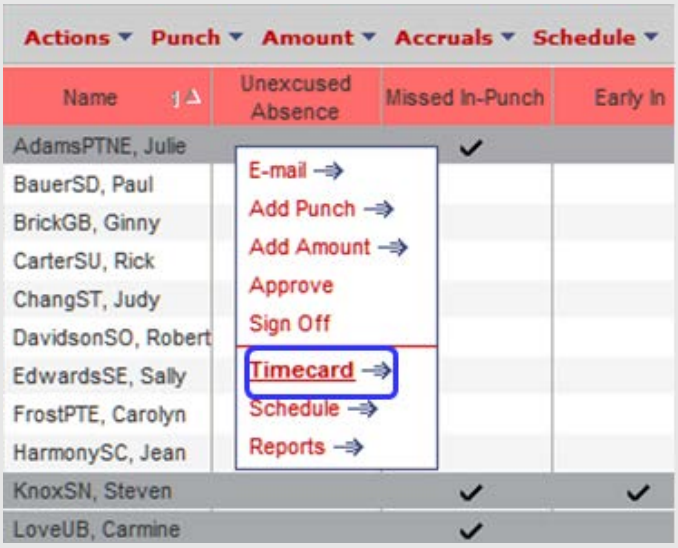
Purpose

Use LoboTime widgets to quickly review and monitor employees' time and attendance data for both hourly and exempt timecard employees. From a LoboTime widget, you can open employees' timecards so that you can make any adjustments prior to payroll processing. For hourly employees, changes above and beyond what is managed in the exceptions widget are managed in the hourly timecard view. For exempt employees, typically changes are managed via the exempt timecard view.

Example

In reviewing the Reconcile Timecard widget, you notice that several employees have time and attendance exceptions. You open each employee's timecard to review and adjust the data.

Steps

1	From the **Related Items** pane, select **Reconcile Timecard**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the correct time period from the **Time Period** drop-down list.	
3	Select the name of employee(s) whose timecards you want to review.	
4	Right-select and select **Timecard**.	

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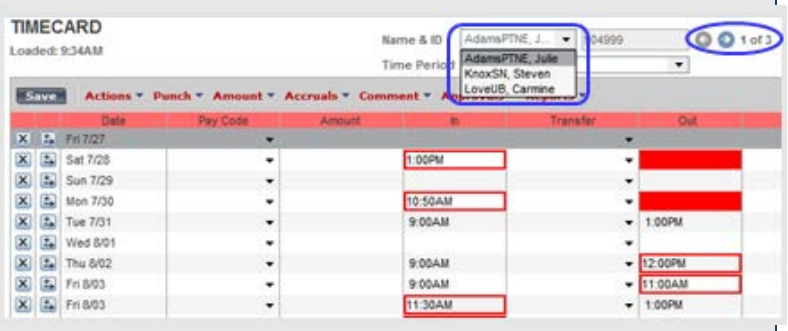
Steps

5	If you selected more than one employee, do one of the following: • Select the **Next** scroll button to move to the next employee. You can use the **Previous** scroll button to move to a previous employee. • Select an employee from the **Name & ID** drop-down list.	

Tip

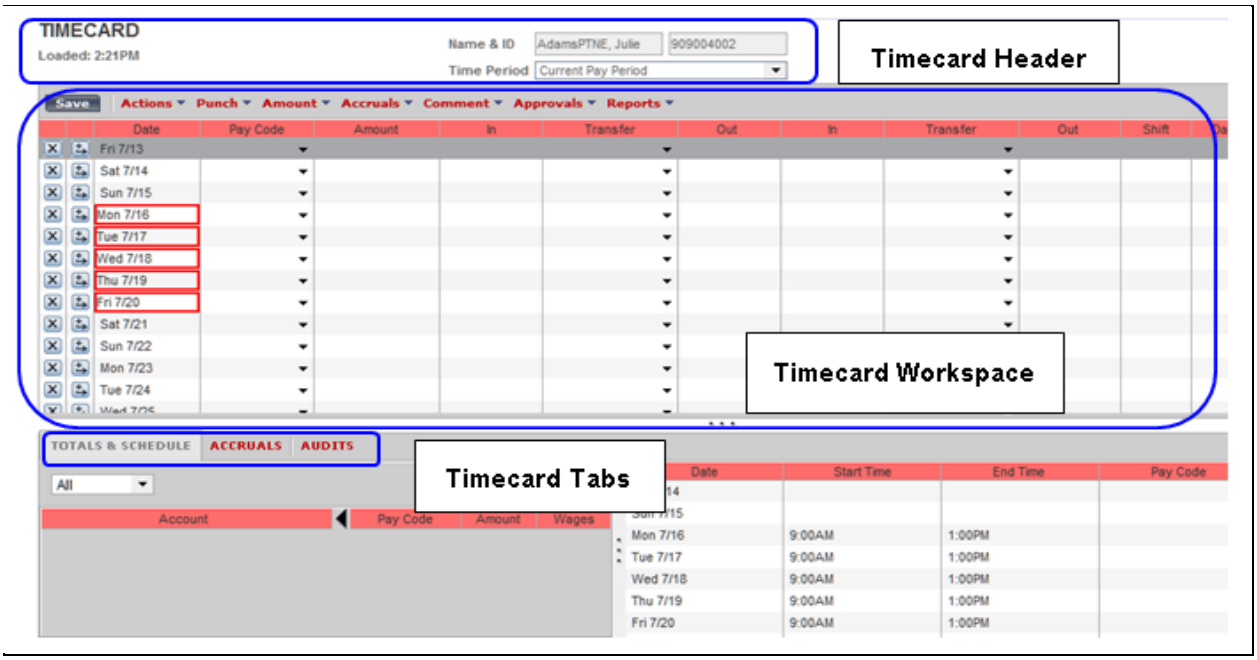
There are various ways to select employees in a LoboTime widget:

- Hold the Ctrl key and select your mouse to select more than one employee not listed next to each other.
- To select a group of employees listed together, use one of these methods:
  - Select on the first employee, then hold the Shift key and select your mouse to select the last employee. This will select all employees in-between.
  - Select and drag the mouse to select multiple employees.

Timecard Overview

There are three main areas on a timecard; the timecard header, timecard grid, and timecard tabs.

Hourly (Biweekly Employee) Timecard



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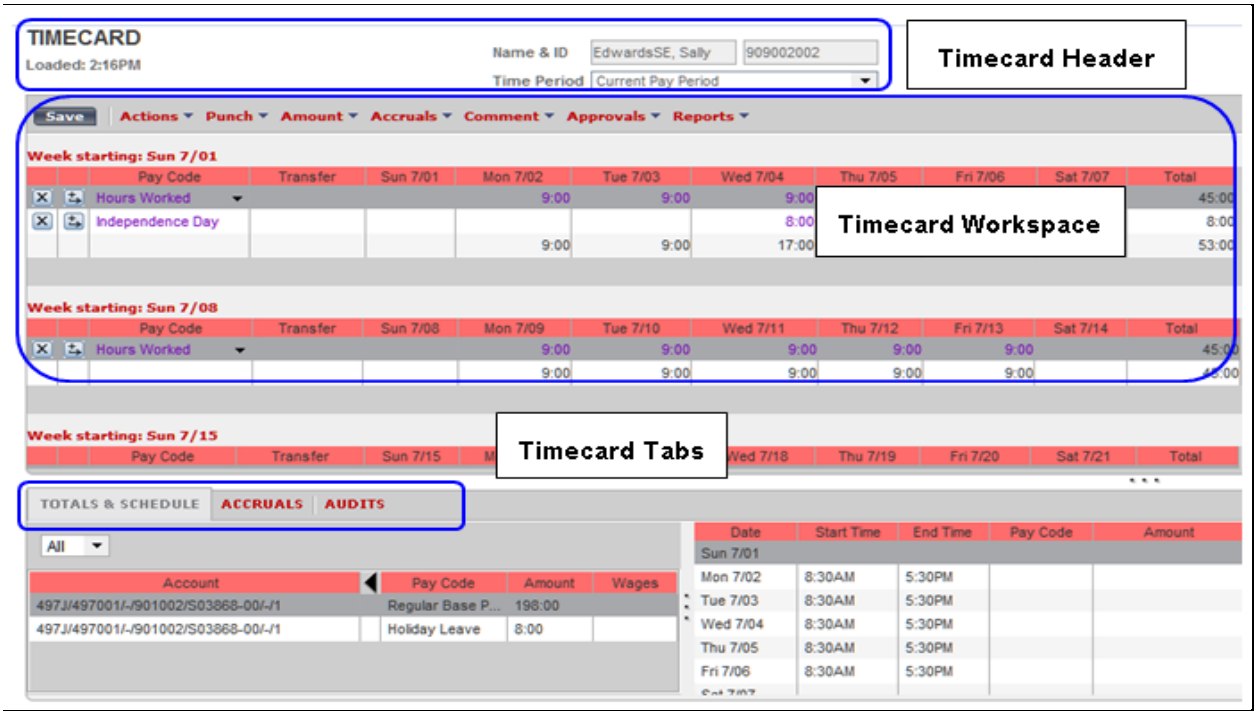
Exempt (Monthly Employee) Timecard



Timecard Area	Description
Timecard header	Displays the following information: • Employee's name whose information appears in the timecard workspace and timecard tabs • Employee's identification number • Time Period
Timecard workspace	Displays the following information: • Menu bar that contains selections for performing timekeeping tasks • Grid containing dates for the selected time period • Time entry totals, including shift, daily, and cumulative amounts **Shift Total** — Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes) **Daily Total** — Calculated total hours of the selected day, including pay codes **Cumulative** — Cumulative total up to and including the selected day **All** — Calculated total hours for the entire visible time period

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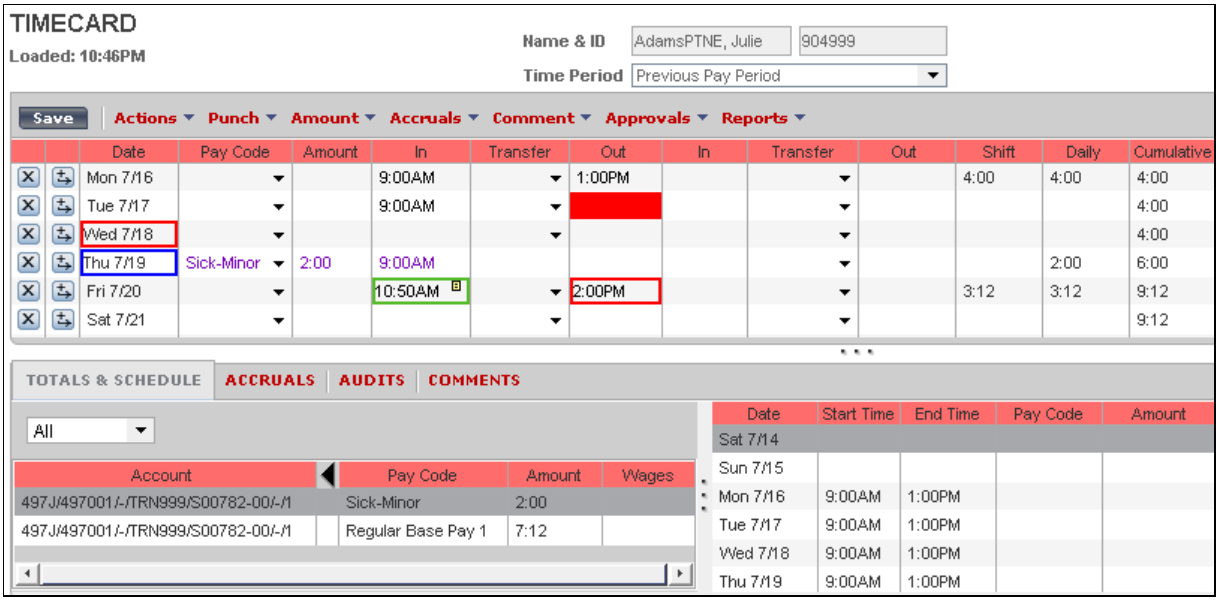
Timecard Area	Description
Timecard tabs	Display additional information about how Kronos tracks employee hours. Three default tabs appear: • **Totals & Schedules** — Refered to as the "Totalizer." The first tab at the bottom of the timecard workspace. The area on the left displays the timecard totals. The area on the right displays the Schedule for the selected time period. • **Accruals** — Displays accrual codes and available balances based on the date selected in the timecard workspace. • **Audits** — Lists all time punch or amount corrections made to an employee's timecard and approvals made by a Supervisor or Time Manager. **Note:** Additional tabs will appear based on actions you perform. For example, the **Approvals & Sign Offs** tab appears when you approve an employee's timecard.

Visual indictors appear on a timecard when an exception occurs. For example, an employee might forget to clock in or out, which causes a missed punch exception. An employee might clock in early or late, which causes a punch exception.



Visual Indicator	Description
Blue-bordered date	An excused absence for the day, such as Vacation, Bereavement, or Jury Duty
Red-bordered date	An unexcused absence for the day
Red-bordered punch	An exception, such as a late or early punch, or a short or long break
Green-bordered punch	Exception has been marked as reviewed
Solid-red cell	A missed punch
Purple text	A transaction that was added by the LoboTime application
Yellow note icon in the top corner of a cell	One or more comments are attached to the punch or amount

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Refreshing and Saving Data in Timecards

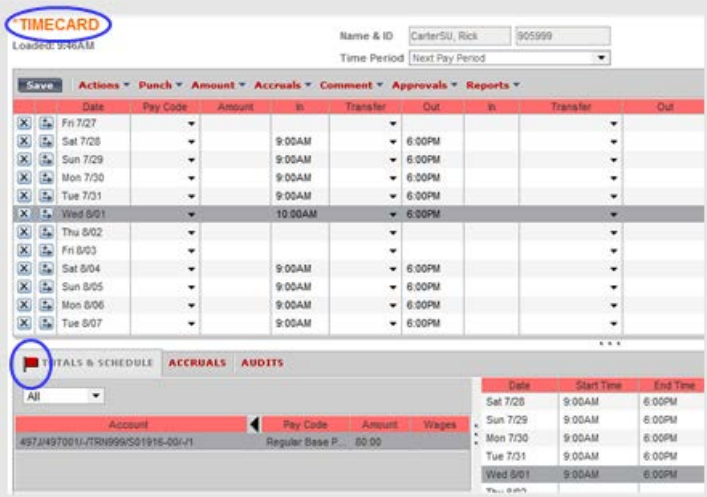
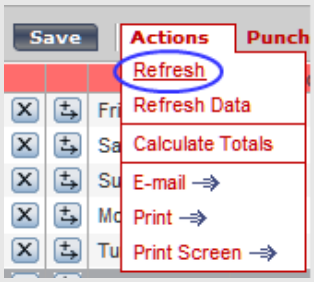
Purpose

When you add and modify timecard data, LoboTime displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can decide whether the edits are what you want.

Example

You have been editing the timecard of Rick CarterSU when you realize that you entered the wrong information. You cancel the edits, enter the correct information and save the timecard.

Canceling Edits

Steps		
1	Perform one or more edits on a timecard. Notice the visual indicators that indicate unsaved data.	
2	Select **Actions > Refresh**.	
3	Do you want to cancel your changes? • To cancel your changes, select **Yes** • To keep your changes, select **No**	

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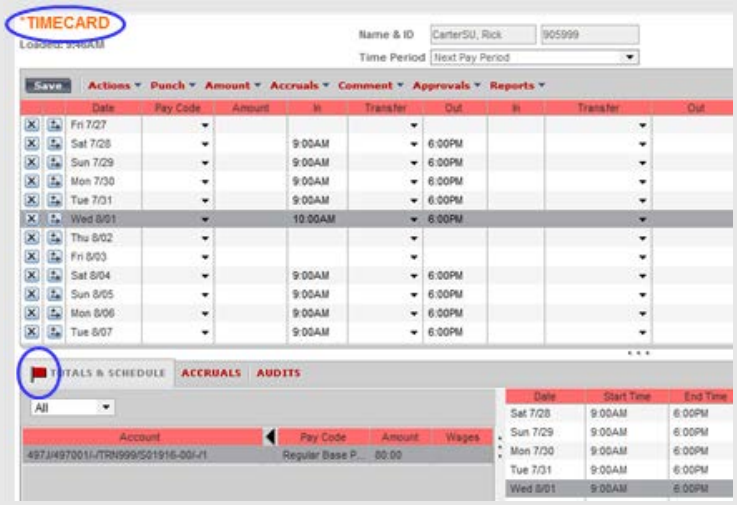
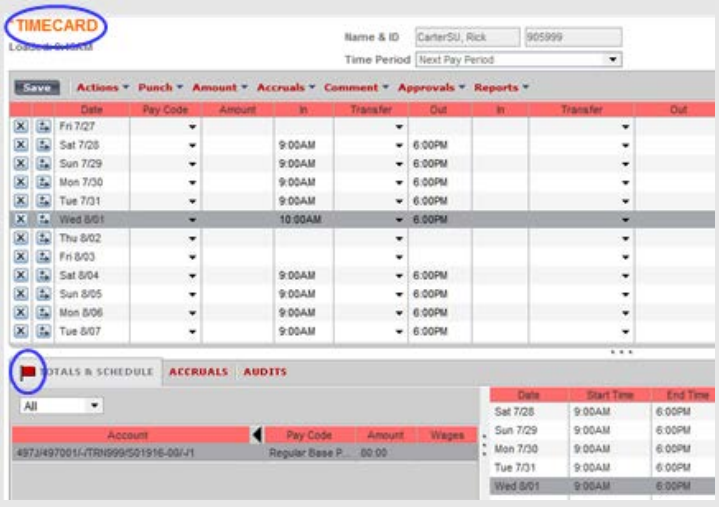
Saving Edits

Step		
1	Perform one or more edits on a timecard. Notice the visual indicators that indicate unsaved data.	
2	Select **Save**.	Review the employee's timecard to ensure that the visual indicators no longer appear, validating that your information was saved.

Calculating

Step		
1	Perform one or more edits on a timecard. Notice the visual indicators that indicate unsaved data.	

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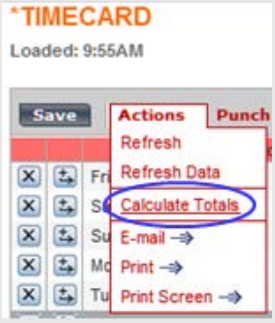
Step		
2	Select **Actions > Calculate Totals**.	
3	Notice that the red flag no longer appears, but the Timecard title still indicates unsaved data.	

Visual Indicator	Description
Timecard title in orange with asterisk	Unsaved edits
Red flag in the Totals & Schedule tab	Totals are not up-to-date

Overriding Punches

Purpose

When employees punch in or out of their shifts, they occasionally mislabel an in punch as an out punch or an out punch as an in punch. To calculate the employee's worked time correctly LoboTime needs to have the same number of in punches as out punches. If they do not match, override the incorrectly labeled punch to correct it.

Example

Julie AdamsPTNE failed to punch in on the first Saturday of the current period, which was an unscheduled day. She did punch out. Without a schedule LoboTime labels the first punch as an in punch. You override the in punch to change it to an out punch.

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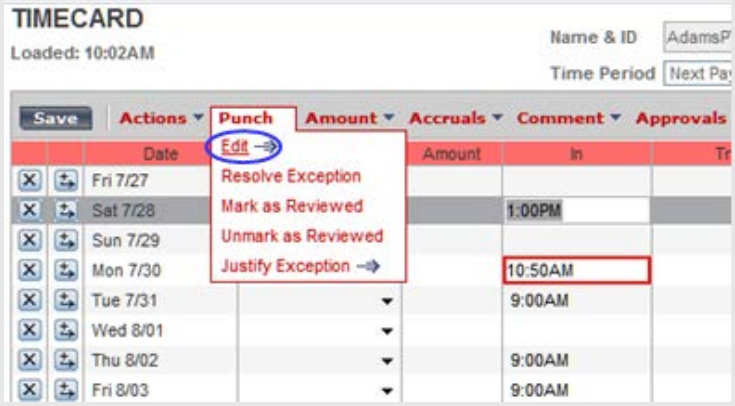
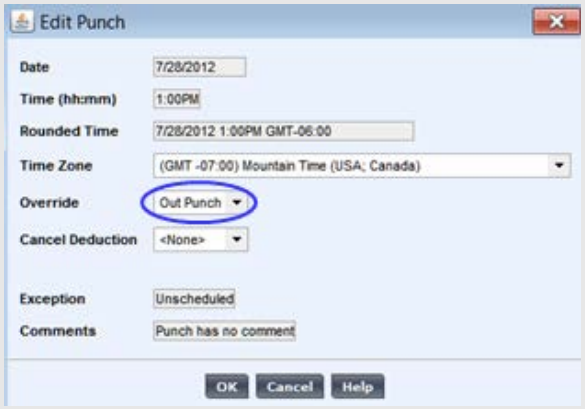
Steps		
1	In the timecard, select the punch you want to override. Select **Punch > Edit**.	
2	Select the punch type from the **Override** drop-down list.	
3	Select Actions > Calculate Totals to preview change	
4	Select **OK**.	
5	Select **Save**.	

Actionable Exception Handling

The following table lists and describes the action links you can use to resolve exceptions in hourly timecards.

Action Button	Description
Save	Saves changes to the database. Title of the page becomes orange when there are unsaved changes have been made.
Timecard	Allows you to view the hourly timecard view. Menu link will be greyed out if currently in the Timecard view.
Schedule	Allows you to view the employee's schedule. Menu link will be greyed out if currently in the Schedule Editor view.
Reports	Allows you to view run employee reports. Menu link will be greyed out if currently in the Reports view.
Mark as Reviewed	Select Punch > Mark as Reviewed Allows you to identify exceptions that you have already addressed and on which you do not plan to take further action. The color of the exception changes from red to green.

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Unmark as Reviewed	Select Punch > Mark as Reviewed Once an exception has been Marked as Reviewed you will have the ability to reverse the Review if needed. The color of the exception changes from green back to red.
Comment	Opens the Add Punch Comment dialog box. Select a comment and, optionally, add a note.
Remove	Allows you to remove punches.

Viewing Accrual Balances in Timecards

Purpose

Before you enter non-worked time, confirm that the employee has accrued enough hours. The Accruals Reporting Period tab displays the employee's current and projected accrued times.

Example

Julie AdamsPTNE would like to take an annual leave day on September 2nd. Before entering the time off, check the employee's vacation balance on the Accruals Reporting Period tab.

TOTALS & SCHEDULE | ACCRUALS | AUDITS

Accrual Profile Non-Exempt

Accrual Code	Balance on Selected Date	Units	Balance Projected Through	Projected Debits	Projected Credits	Projected Balance	Balance without Projected Credits
Annual	20:00	Hour	8/11/2012	0:00	0:19	20:19	20:00
Catastrophic	0:00	Hour	8/11/2012	0:00	0:00	0:00	0:00
Comp Earned	0:00	Hour	8/11/2012	0:00	0:00	0:00	0:00
Comp Payout	0:00	Hour	8/11/2012	0:00	0:00	0:00	0:00
FMLA	0:00	Hour	8/11/2012	0:00	0:00	0:00	0:00

Column	Description
Type	The code that identifies and holds the type of accrual balance, such as Annual or Sick Leave
Reporting Period	The accrual reporting period
Units	The unit that is associated with an accrual code, measured in days or hours
Opening Balance	The accrual balance as of the first date in the Reporting Period column
Earned to Date	The total amount of time earned up to the last date selected in the Schedule Editor
Taken to Date	The total amount of time taken up to the last date selected in the Schedule Editor
Available	The balance that is available as of the date selected in the Balance as of field
Planned Takings	The total amount of time scheduled to be used (taken) from the end of the selected schedule period through the end of the Reporting Period
Pending Grants	The total amount of time scheduled to be granted (fixed grants) from the end of the visible schedule period through the end of the Reporting Period
Ending Balance	The accrual code balance as of the last date in the Reporting Period, including Pending Grants and Planned Takings

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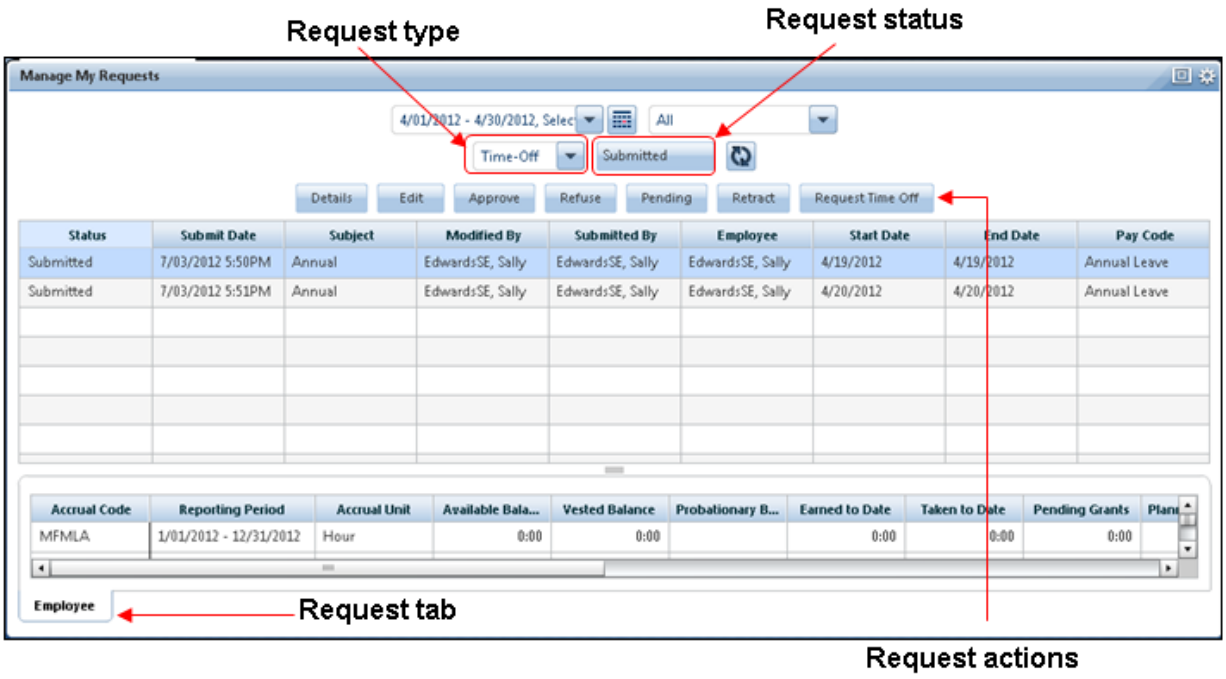
Managing Requests

Processing Employee Requests Using Manage My Requests Widget

Purpose

The Manage Requests widget summarizes all requests in one window and provides all supporting information needed to process requests right from the same screen. Requests can come from employees or other Supervisor or Time Managers, for example, manager delegation requests. In the Manage Requests widget, Supervisor or Time Managers can process requests one-at-a-time or simultaneously process multiple requests of the same type. Supervisor or Time Managers can also both filter the list of requests displayed in the widget and sort the list by column.



Component	Description
Request type	This field enables Supervisor or Time Managers to filter the requests that are listed based on the request type.
Request status	This field enables Supervisor or Time Managers to filter the requests that are listed based on the request status.
Request tabs	These tabs display different information relevant to the selected request.
Request actions	These buttons enable Supervisor or Time Managers to perform actions related to processing employee requests.

Example

An employee has requested a day off. You want to view the employees' requests and approve the request if the employee has the time available.

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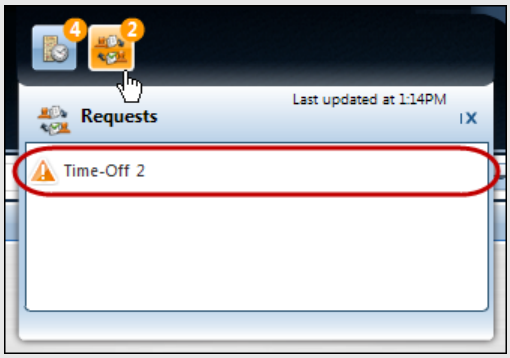
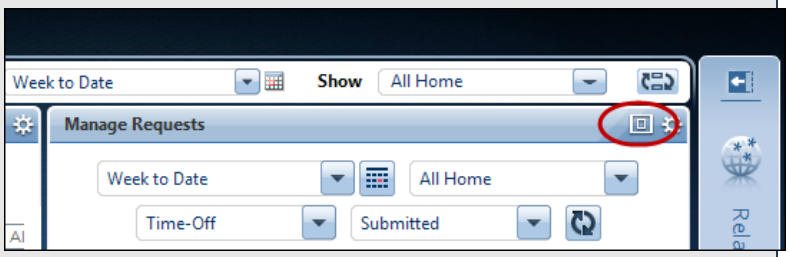
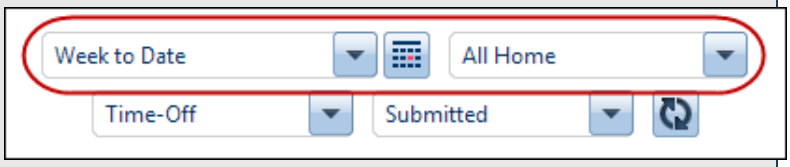
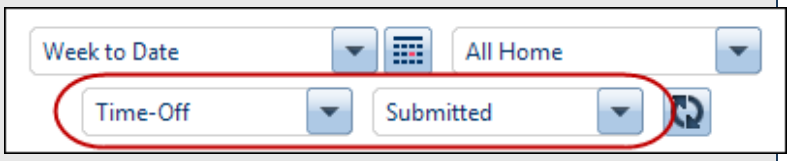
Steps		
1	To access the **Manage Requests** widget, choose one of the following: • Select a request type in the **Requests** alert list. • Select **Manage Requests** from the **Related Items** pane. **Note:** If you select this method, close the **Related Items** pane when you're done to maximize the space for your widget(s).	
2	In the **Manage My Requests** widget, select the **Maximize/Restore** icon to expand the widget to its full size.	
3	Confirm the default values or select new values in the **Time Period** and **Show** fields.	
4	Confirm the default values or select new values in the **Request type** and **Request status** fields.	
5	Select a request to process.	
6	To approve, refuse, or perform another action on the selected request(s), select the applicable button.	
7	In the dialog box that appears, verify the displayed information and, if applicable, select a comment from the **Comments** drop-down list and/or enter text in the **Notes** field.	

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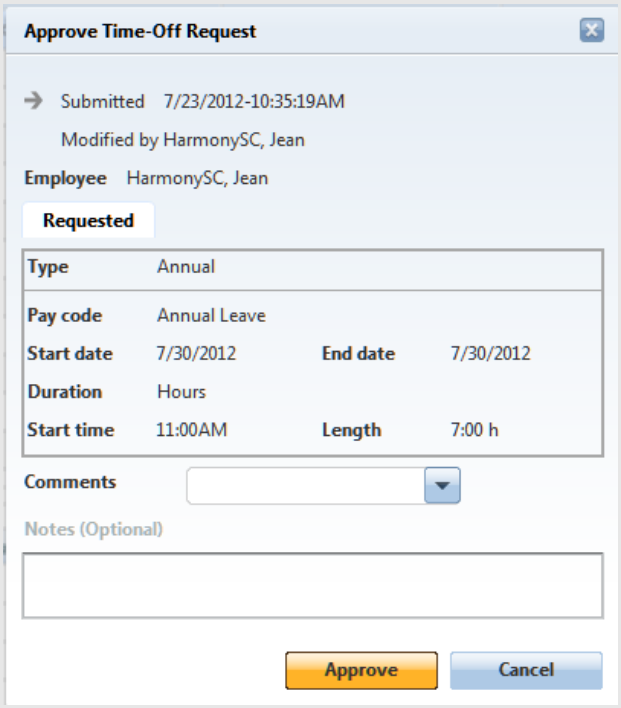
Steps		
8	Select the button to confirm the action you wish to perform.	

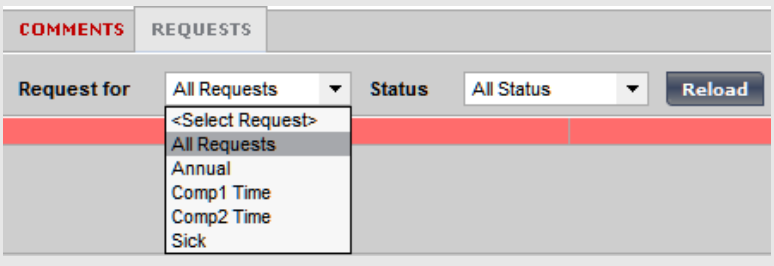
Processing Time-Off Requests Using Schedule Editor

Purpose

Employees can submit time-off requests using the My Requests Calendar in the application. These requests are stored in the Requests tab of the Schedule Editor, where you can evaluate them and approve or reject them. This feature provides a consistent, easily accessible way for employees to request or cancel time off, as well as a quick way for Supervisor or Time Managers to evaluate and respond to requests.

Example

Jean HarmonySC submits a request for time off on a day when she is scheduled to work. You review the Requests tab, verify that she has the time to take, and then approve the request.

Steps		
1	From the Related Items pane, select **Schedule Editor.**	
2	Select the **Requests** tab.	
3	From the **Request For** drop-down list, select an option and then select **Reload**.	

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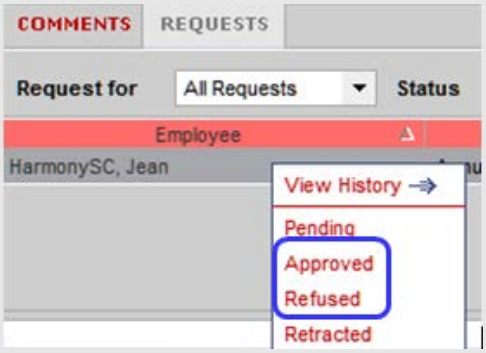
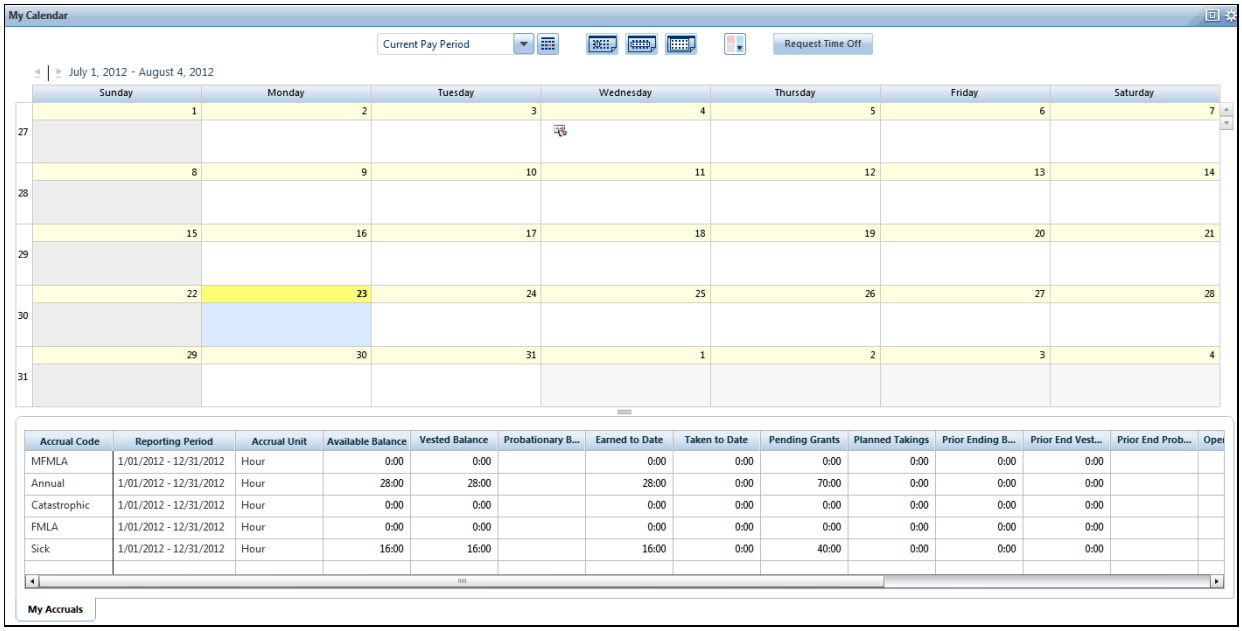
Steps		
4	Select the request and right-select to access the shortcut menu.	
5	Are you approving or rejecting the request? • To approve the request, select the **Approved** option. • To reject the request, select the **Refused** option.	
6	Select **Save**.	

Requesting Time Off Using My Calendar

Purpose

The **My Calendar** displays your schedule for the current pay period as well as previous and subsequent pay periods. It provides a consistent, easily accessible way to request or cancel time off. LoboTime forwards the requests to your Supervisor or Time Manager to handle appropriately.



Accrual Code	Reporting Period	Accrual Unit	Available Balance	Vested Balance	Probationary B...	Earned to Date	Taken to Date	Pending Grants	Planned Takings	Prior Ending B...	Prior End Vest...	Prior End Prob...
MFMLA	1/01/2012 - 12/31/2012	Hour	0:00	0:00		0:00	0:00	0:00	0:00	0:00	0:00	
Annual	1/01/2012 - 12/31/2012	Hour	28:00	28:00		28:00	0:00	70:00	0:00	0:00	0:00	
Catastrophic	1/01/2012 - 12/31/2012	Hour	0:00	0:00		0:00	0:00	0:00	0:00	0:00	0:00	
FMLA	1/01/2012 - 12/31/2012	Hour	0:00	0:00		0:00	0:00	0:00	0:00	0:00	0:00	
Sick	1/01/2012 - 12/31/2012	Hour	16:00	16:00		16:00	0:00	40:00	0:00	0:00	0:00	

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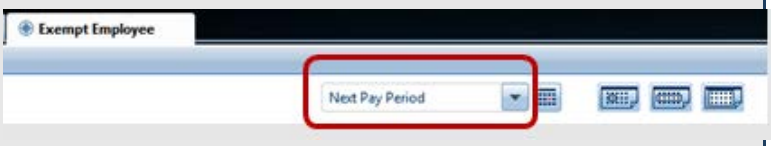
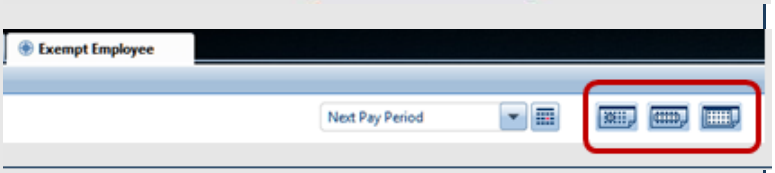
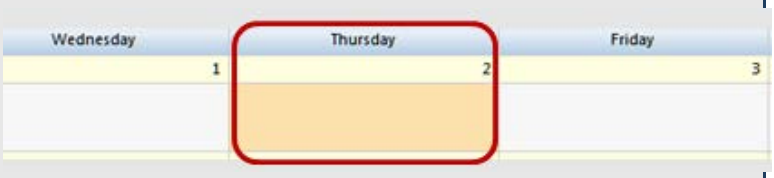
Example

Your childcare provider will be unavailable next Thursday and Friday and you need to take the days off. Submit a time off request for eight hours of vacation for next Thursday and Friday.

Steps		
1	From the **Workspaces** carousel, access **Exempt Employee**. **Note: Exempt Employee** could be in a workspace or in the Related Items pane.	
2	Select the specific time period from the **Time Period** drop-down list. You can also adjust the width of the calendar view. Then select **Apply**.	
3	Select the date in the calendar when you want the time off to begin.	
4	Select **Request Time Off.**	

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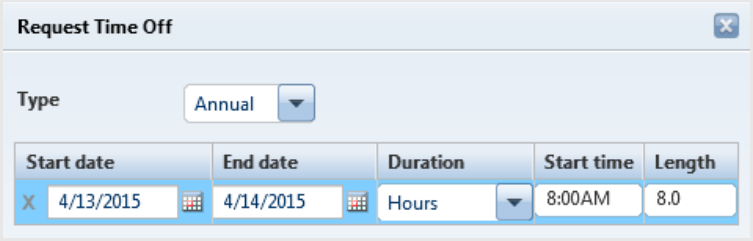
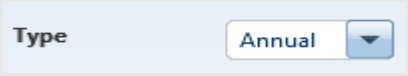
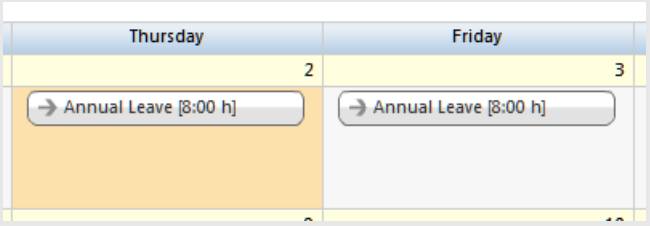
Steps		
5	Confirm that the **Start Date** is correct. Select the **End Date** calendar icon and select the date when you want the time off to end. NOTE: Dates entered should NOT span over a weekend.	
6	Confirm that the **Pay code** field is correct.	
7	Enter **Length**	NOTE: Hours entered are PER DAY. For example if 3 consecutive days are requested enter 8.0 in the length field.
8	Select **Submit**.	
10	The request has been submitted for approval and appears in the employee's calendar with the **Submitted** (arrow) icon.	

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Steps

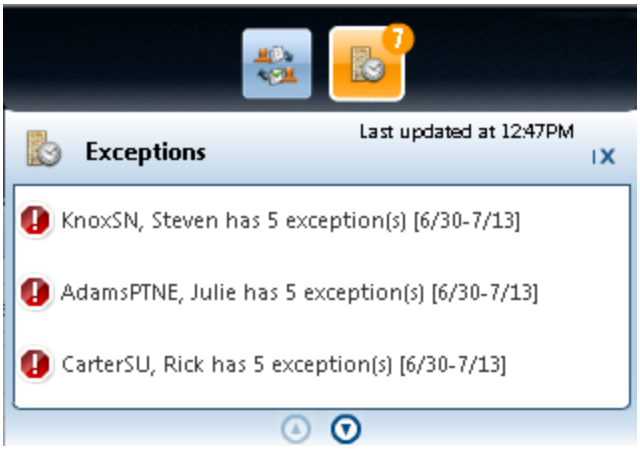
Managing Exceptions for Employees

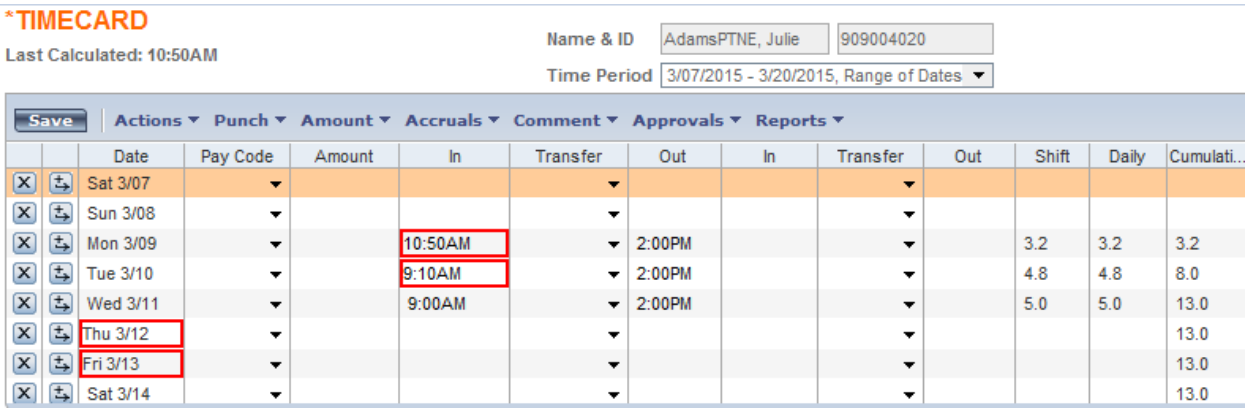
Using Genies and Alert Icons to Manage Exceptions

Purpose

Your navigator is configured to receive alerts, and if one of your employees has triggered a time data exception that requires your attention, you will see an Alerts icon at the top of your navigator when you log in.

Hover your cursor over the Alert icon to see a list of the exceptions. Select an employee from the list to view the details of the exception. You will be brought to the Time Data Exceptions widget.





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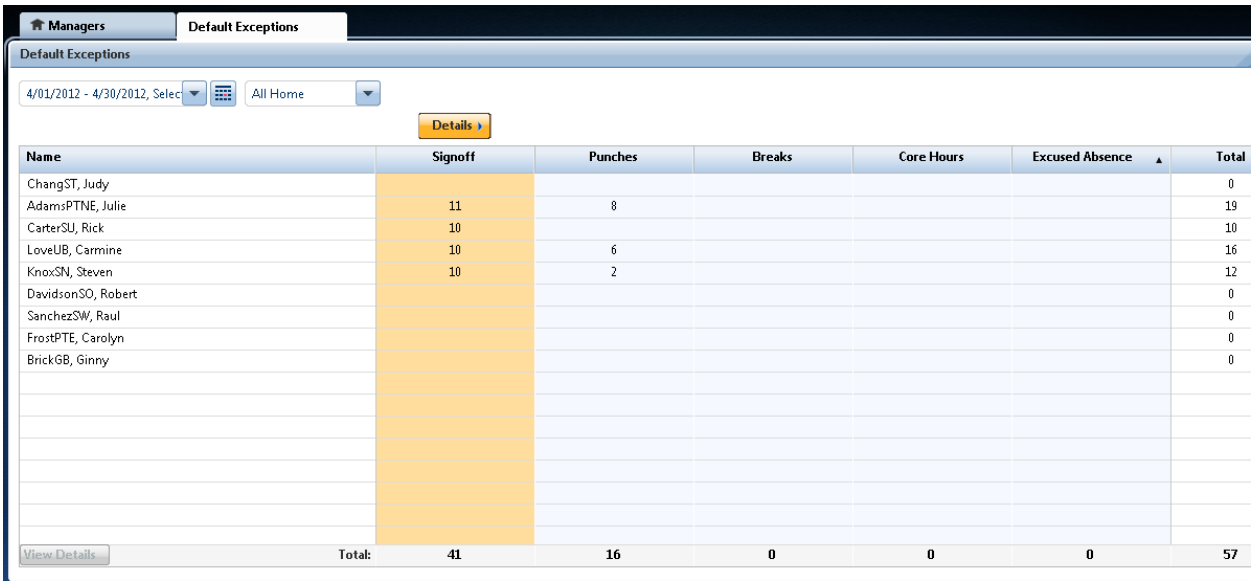
Viewing Exceptions

Purpose

When hourly employees forget to punch, or punch in early or late, their pay can be impacted. Therefore, it is your responsibility to resolve any discrepancies to make sure that employees get paid correctly. In addition, some organizations restrict payroll processing if issues are not resolved. Exception widgets allow you to recognize and resolve the most common types of exceptions.

The Summary View

In the summary view, the Time Data Exceptions widget displays a list of your employees for the time period and HyperFind selected at the top of the widget. It organizes the employee exceptions according to your organization's "exception type" preferences.



Recognizing common exceptions and visual cues in Time Detail view

Visual cues help Supervisors or Time Managers quickly understand time data issues that require their immediate attention. The following table summarizes the most common visual cues.

Description	Visual indicator
In or Out punch cell is filled with solid red	Missed in or out punch
In or Out time displays in red text	Early in or out/Late in or out
Date displays in red text	Unexcused absence
In or Out punch cell is filled with solid red	Double-punch
In or Out punches are in green text	Punch has been marked as reviewed or justified
In or Out punches are in purple text	Punch has been added by LoboTime

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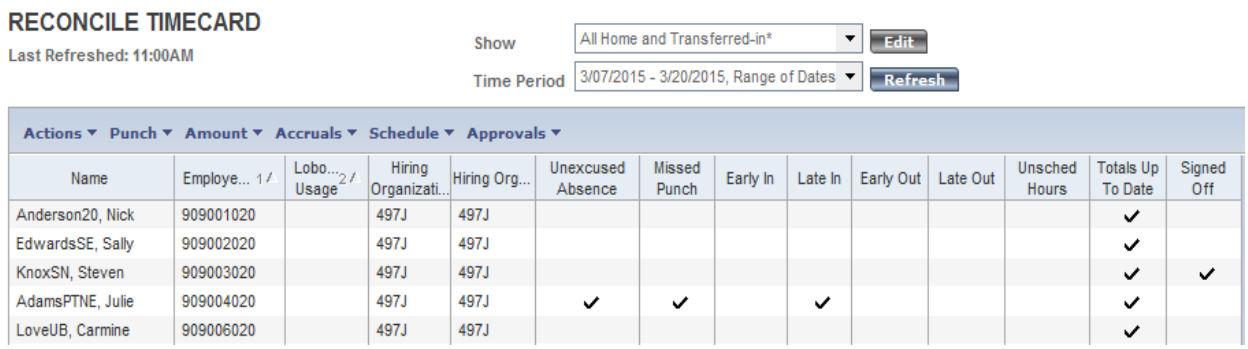

RECONCILE TIMECARD

Last Refreshed: 11:00AM

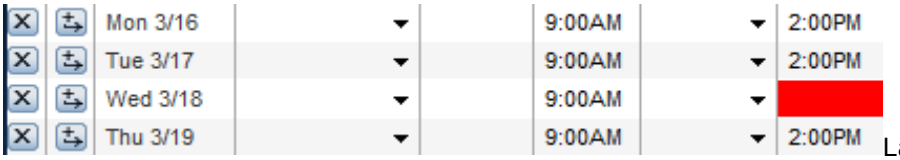
Show: All Home and Transferred-in* | Edit

Time Period: 3/07/2015 - 3/20/2015, Range of Dates | Refresh

Actions ▾ Punch ▾ Amount ▾ Accruals ▾ Schedule ▾ Approvals ▾

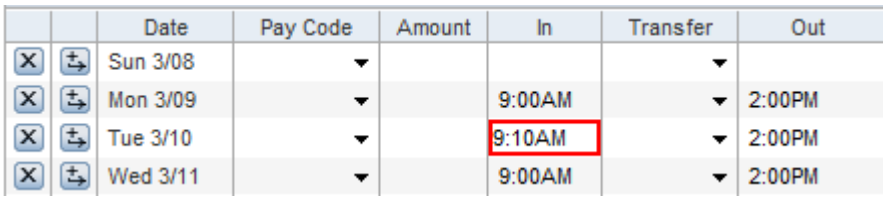
Name	Employe... 1	Lobo... 2 Usage	Hiring Organizati...	Hiring Org...	Unexcused Absence	Missed Punch	Early In	Late In	Early Out	Late Out	Unsched Hours	Totals Up To Date	Signed Off
Anderson20, Nick	909001020		497J	497J								✓	
EdwardsSE, Sally	909002020		497J	497J								✓	
KnoxSN, Steven	909003020		497J	497J								✓	✓
AdamsPTNE, Julie	909004020		497J	497J	✓	✓		✓				✓	
LoveUB, Carmine	909006020		497J	497J								✓	

Missed In/Out Punch Example



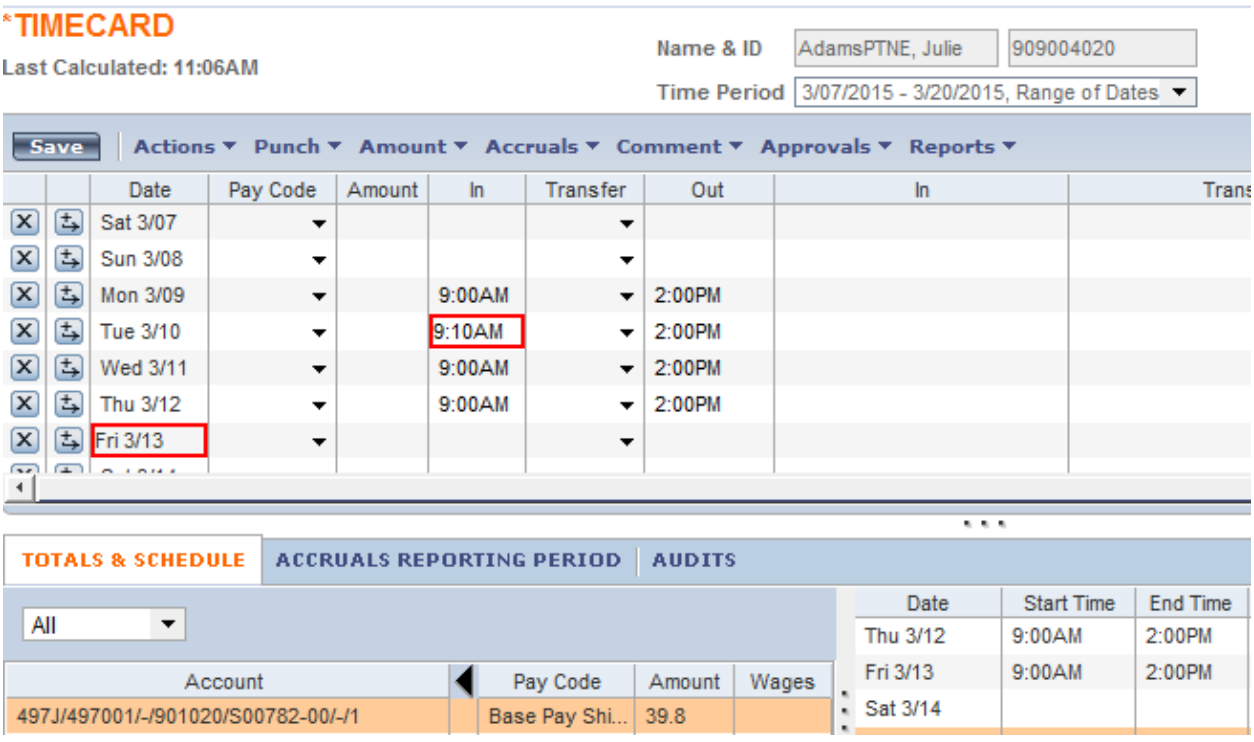
Mon 3/16			9:00AM		2:00PM
Tue 3/17			9:00AM		2:00PM
Wed 3/18			9:00AM		
Thu 3/19			9:00AM		2:00PM

Late In/Out Example on 3/10



Date	Pay Code	Amount	In	Transfer	Out
Sun 3/08					
Mon 3/09			9:00AM		2:00PM
Tue 3/10			9:10AM		2:00PM
Wed 3/11			9:00AM		2:00PM

Unexcused Absence Example on 3/13


*TIMECARD

Last Calculated: 11:06AM

Name & ID: AdamsPTNE, Julie | 909004020

Time Period: 3/07/2015 - 3/20/2015, Range of Dates

Save | Actions ▾ Punch ▾ Amount ▾ Accruals ▾ Comment ▾ Approvals ▾ Reports ▾

Date	Pay Code	Amount	In	Transfer	Out	In	Trans
Sat 3/07							
Sun 3/08							
Mon 3/09			9:00AM		2:00PM		
Tue 3/10			9:10AM		2:00PM		
Wed 3/11			9:00AM		2:00PM		
Thu 3/12			9:00AM		2:00PM		
Fri 3/13							

TOTALS & SCHEDULE | ACCRUALS REPORTING PERIOD | AUDITS

All

Account	Pay Code	Amount	Wages
497J/497001/-/901020/S00782-00/-/1	Base Pay Shi...	39.8	

Date	Start Time	End Time
Thu 3/12	9:00AM	2:00PM
Fri 3/13	9:00AM	2:00PM
Sat 3/14		

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Double Punch Example on 3/9

Remove the second pumch at 9:01AM by selecting the cell > deleting the entire contents > Save

		Date	Pay Code	Amount	In	Transfer	Out	In
		Sat 3/07						
		Sun 3/08						
		Mon 3/09			9:00AM		9:01AM	

Double Punch Example

For every In punch there needs to be a corresponding Out punch. Often, double-punches are identified as a missing punch because the extra punch does not have a corresponding punch.

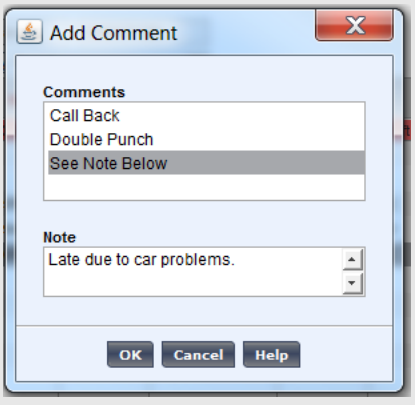
Attaching Comments and Notes to Punches

Purpose

Comments are predefined descriptive phrases that you attach to a punch or amount to provide additional, useful information about that transaction. You can attach as many comments as needed to explain the punch or amount. You can also add free-text notes to comments for additional clarification.

Example

On Monday of the current pay period, Julie AdamsPTNE arrived late to work because she had car problems. You want to add a comment to the employee's 10:50 A.M. punch as a reminder of why the employee did not work her entire shift. From the Reconcile Timecard widget, access the employee's timecard. Then add the Late-Car Problems comment to the employee's 10:50 A.M. punch for Monday of the current pay period.

Steps		
1	In the timecard detail view, select the cell containing the exception.	
2	Select **Comment**.	
3	From the list of comments, select to select the comment you want to add.	
4	(Optional) Too add a note, select in the Note section and enter text.	
5	Select **OK**.	
6	Select **Save**.	

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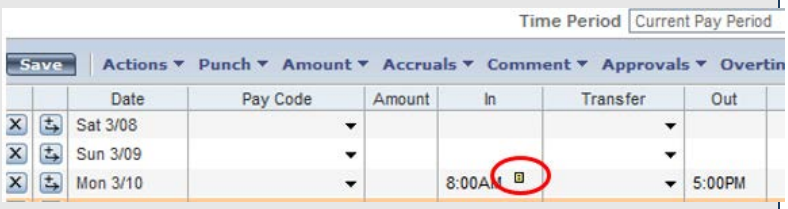
Steps		
7	Confirm that the note icon appears in the time detail view.	

Business best practice

Attach comments to any edit made in an employee's record.

Note

All comments may be seen by other parties including the employee and other managers and are historical records in the employee's time detail report. Keep comments and notes in a respectful, factual and professional.

Effective Use of Comments in LoboTime

In the Attaching Comments and Notes to Punches section of this guide, you were shown how to functionally use comments when editing a punch. In LoboTime the Supervisor or Time Manager has the ability to add comments when they are:

- Editing a punch
- Approving or refusing a leave request
- Editing a shift
- Editing a pay code

Functionally adding a comment and a note in each of the above actions can be found in section named Attaching Comments and Notes to Punches. Below is a guide to assist you in selecting the appropriate comment in each of these actions.
It is important to remember that any time you are making a change to an employee's time card, the change should be documented for tracking and auditing purposes. After selecting a comment from a supplied list of appropriate comments, you also have the ability to add a note in a text box. The note is your opportunity to add narrative documentation furthering explaining why you were specifically taking an action. Be aware your comments and notes are viewable by the employee and auditors.

Comments Available when Approving, Returning, or Refusing a Leave Request

When submitting a request, the employee's view will have "See Notes" default into the comment section and the employee should be advised to use the Notes text box to write an explanation of the request.

Comment	Description	Example
Conditional Approval	Request is Approved by with conditions	Leave Request is approved but they are expected to bring a note from their Doctor.

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Comment	Description	Example
Coverage Issue	Request is refused due to a coverage issue	Multiple employees have requested leave at the same time, which will not leave adequate coverage for the department.
Excessive AL Usage	Request is refused due to employee's excessive use of leave.	The employee has requested every Friday off for the past month.
See Note	Generic comment that is used when there are no specific comments available for the reason that a leave is approved or refused.	The employee requests A/L for a death covered by the Bereavement Leave and the Manager plans on editing the pay code to change it to Other Paid Leave. The Manager will document in the notes section.

Comments Available when Editing a Pay Code

(When a person hasn't punched in and/or out in order to ensure the person is paid and the appropriate pay code is specified)

Comment	Description	Example
Bereavement	When an employee is on "other paid leave" due to death of a family member.	The employee could not request Bereavement leave in the system. The manager inputs pay code "other paid leave" and chooses "Bereavement."
Conference	When an employee is at a conference during normal work schedule or during regular work hours. There are additional provisions. (Contact your HR Consultant for guidance in paying non-exempt employees while attending a conference).	Choose this comment when the employee is unable to punch.
FMLA	When an employee is on approved FMLA with applicable pay code	The employee may use FMLA with or without paid sick and annual leave. i.e. employee is using sick leave concurrently with FMLA. If an employee has exhausted all sick and annual leave the FMLA comment would be used in conjunction with LWOP.
Jury and Court Duty	When an employee is in jury duty or at court if it is during the regular work hours	Use in combination with "other paid leave" when the employee is on court or jury duty.
Marriage	When the employee is out during regular work hours for his/her own wedding	Use in combination with "other paid leave" when the employee does not punch because he/she is getting married during his/her regular schedule.
No Show-Unexcused Absence	When the employee is out and has not received prior authorization	Use in combination with "LWOP" when the employee misses a punch because he/she did not come in and did not call.
Per Supv –Previous Pay Period Hours	When an employee who is not showing up in Lobotime has worked	Use in combination with appropriate hours and pay code to make an edit to a missed punch.
Standby	When an employee has been placed on standby	Use to pay an employee at the standby rate when he/she has been officially placed on standby with the expectation that he/she may need to come in.

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Comment	Description	Example
Training and Education	When a person misses a punch because he/she is at a training session or is taking an authorized course during UNM time	Use to capture the amount of time that an employee is at training or taking an authorized course during work time. This would be regular time as opposed to "other paid leave."
University or Dept Closure	When the employee misses a punch because the University or department needs to close	This situation could occur because of department closure due to facility mishap i.e. flooding or University closure due to inclement weather. Use in combination with "other paid leave."
Voting Time	When a person has to vote during regularly scheduled work hours	Use in combination with "other paid leave."
See Note Below	Generic comment that is used when there are no specific comments available for the reason that a pay code is being edited.	The Manager or Supervisor wants to document an edit to a pay code that is not covered by the available comments and will add a note for documentation.

Comments Available when Editing a Punch

Comment	Description	Example
Call Back	When a person needs to come back to the workplace to work after having left for the end of the day	Use when a physical plant employee is called into work due to a flood in a building.
Double Punch	When the employee punches several times in error.	Use when employee inadvertently swipes out for lunch two times in a row.
See Note Below	Generic comment that is used when there are no specific comments available for the reason that a punch is being edited.	The Manager or Supervisor wants to document a punch edit that is not covered by the available comments and will add a note for documentation.

Comments Available when Paying from Schedule

(When a person hasn't punched in and/or out in order to ensure the person is paid)

Comment	Description	Example
Badge Reader Error & Forgot ID	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when the time clock is unable to read badge and the employee can't remember his/her UNM ID.
Building Locked	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when the employee reports for work but is unable to get into the building at his/her regular work time to clock in.
Clock Inoperable	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when the clock is malfunctioning until the repair or re-setting can be made.
Forgot to Punch	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when the employee did not punch in or out. The manager should discuss the matter with the employee and edit the punch with the correct time the employee left/returned.

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Comment	Description	Example
Meeting	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when the employee is unable to punch in or out because he/she is in a meeting away from the time clock or P.C.
New Employee	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when a new employee starts in the department and has not punched in or out because he/she is not yet on Lobotime.
No Badge & Forgot ID	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when the employee forgets his/her badge and can't remember his/her UNM ID.
Resigned	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when someone resigns and walks off the job without punching out.
Worked After Punch	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when an employee ends up having to work after he/she punched out.
Worked Before Punch	This enables the manager to a supporting comment for adjusting an employee's punch.	Use when an employee ends up working before he/she has punched in.
See Note Below	Generic comment that is used when there are no specific comments available for the reason that a Manager is paying from schedule..	The Manager or Supervisor wants pay from schedulet that is not covered by the available comments and will add a note for documentation.

Comments Available when Editing Shift

(This is for a temporary change to shift for the day or week.)

Comment	Description	Example
Accommodation	When the employee needs a temporary change to shift for accommodation (Please contact your HR Consultant for further guidance.)	Use when an employee has to come in late due to medical issue as approved through accommodation request.
Coverage Issue	When the business needs require the employee works a different schedule.	Use when an employee is required to stay past his/her schedule to help with coverage.
Employee Request	When the employee requests to work a different schedule due to personal needs	Use when the employee elects to come in late or leave early (with management approval).
FMLA	When the employee needs a temporary shift for Family Medical Leave. (Please contact your HR Consultant for further guidance.)	Use when an employee has to come in late due to medical issue as approved through a Family Medical Leave request.
Management Request	Managing employee's hours based on appointment percentage	Use when the employee has to flex his/her schedule to ensure he/she does not work beyond appointment percentage
See Note Below	Generic comment that is used when there are no specific comments available for the reason that a shift is being edited.	The Manager or Supervisor wants to document a shift edit that is not covered by the available comments and will add a note for documentation.

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Marking/Unmarking Exceptions as Reviewed

Purpose

Once you have reviewed an exception and resolved it to your satisfaction, you can mark the exception as having already been reviewed. Once you have marked an exception as reviewed, the exception no longer appears on any Exception widget. The exception remains visible in the timecard and in certain widgets, but will be outlined in green. Additionally, at any time you can choose to unmark an exception as reviewed.

Example

On Monday of the current pay period, Julie AdamsPTNE arrived late to work because of car problems. You added a comment to the employee's 10:50 A.M. punch as a reminder of why the employee did not work her entire shift. Now you want to mark the exception as reviewed so that you do not re-check it again at a later date.

Steps		
1	In the timecard detail view, select the cell containing the exception.	
2	Do you want to mark an exception as reviewed, or unmark an exception as reviewed? • To mark an exception as reviewed, select **Mark as Reviewed**. • To unmark an exception as reviewed, select **Unmark as Reviewed**. **Note:** Mark as Reviewed is only available for exceptions that have not already been marked as reviewed. Additionally, Unmark as Reviewed is only available for exceptions that have already been marked as reviewed.	
3	Review the results.	

Business practice

Departments are strongly encouraged to review exceptions on a daily basis.

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Adding Missed Punches

Purpose

An employee might forget to punch in or out. When this happens, a solid-red box appears in the missed In or Out cell. The application accepts multiple formats for entering punches in a timecard.

Example

Julie AdamsPTNE notified you that she forgot to enter punches on Wednesday of the current pay period. The employee started her shift at 9:00 A.M. and ended her shift at 2:00 P.M. From the Timecard view, enter the In punch and Out punch by selecting in the cell marked with a red box and manually enter the time.

Steps		
1	In the timecard detail view, select the cell containing the exception.	
2	In the **Add Punch** dialog box, confirm the date.	
3	From the **Insert** drop-down list, select the applicable punch option: • In Punch • Out Punch • In and Out Punches	
4	Select **Save**. Confirm that the exception no longer appears in the Reconcile Timecard Genie and in the Timecard views.	

Business practice

You must fix all Missed Punches before timecards can be signed off and Payroll successful runs.

Removing Punches

Purpose

As a rule, you should not remove punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. When this occurs, you will want to remove the extra punch.

Example

Steven KnoxSN could not remember if he punched in at the beginning of his shift on Monday of the current pay period. He punched in a second time to ensure that he recorded his start-of-shift time. While reviewing the employee's time detail, you notice that two In punches appear for the employee's start of shift on Monday. You want to remove the employee's second In punch at 8:31 A.M. From the employee's time detail, remove the 8:31 A.M. punch for Monday using the Remove feature.

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Steps		
1	In the timecard detail view, select the cell containing the exception.	
2	Select **Remove**.	
3	Select **Save**. Confirm that the exception no longer appears in the time detail view.	

Applying a Work Rule Transfer for Labor Overrides

Purpose

Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged and the right work rule is applied. You or the employee can record the transfer directly in the schedule or timecard.

Example

Steps		
1	From the **Related Items** pane, select **Reconcile Timecard**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Select the employee, right-select and then select **Timecard**.	
4	Select the drop-down arrow in the **Transfer** cell between the **In** and **Out** punch cells for the date you want to record the transfer.	
5	Does the work rule appear in the Transfer list? • If yes, select the work rule and continue to step 8. • If no, select **Search** and continue to the next step.	

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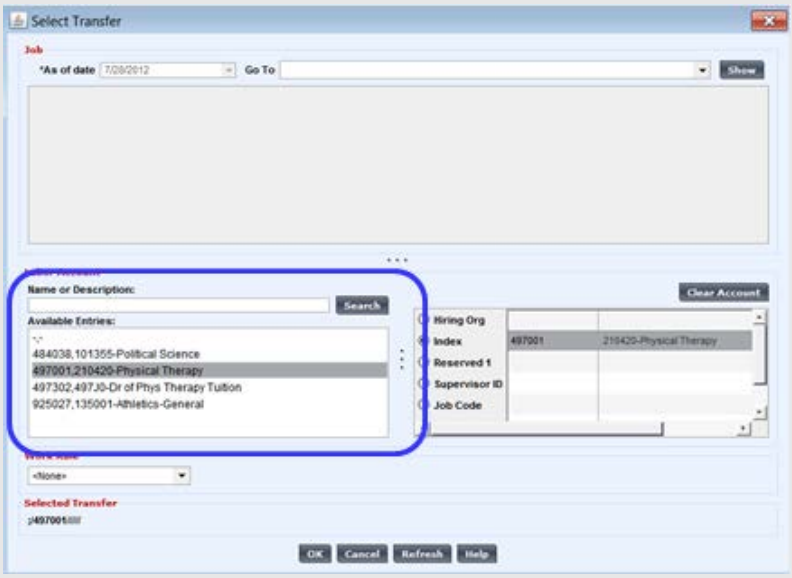
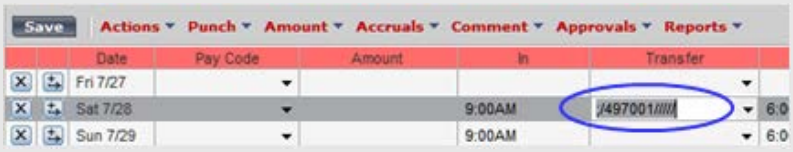
Steps		
6	To transfer hours to another index, select the index from the **Available Entries box**. The search can be refined in the Name or Description box. Enter the first couple of digits of index code, then use wildcard * to complete search. For example: enter 925* Hit search All available index codes that begin with 925 will appear.	
7	Select **OK**.	
8	Select **Save**.	

Transferring Overtime to Comp Time Earned

Purpose

Per University policy an employee may be granted compensatory time off in lieu of overtime pay. If the supervisor and the employee have a written agreement, complete a transfer to move overtime hours earned to compensatory time earned at time and a half.

Example

Rick CarterSU has worked two hours of overtime in the second week of the current pay period. Complete a transfer to move the overtime hours to compensatory time earned at time and a half.

Steps		
1	From the **Related Items** pane, select **Reconcile Timecard**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Select the employee, right-select and then select **Timecard**.	

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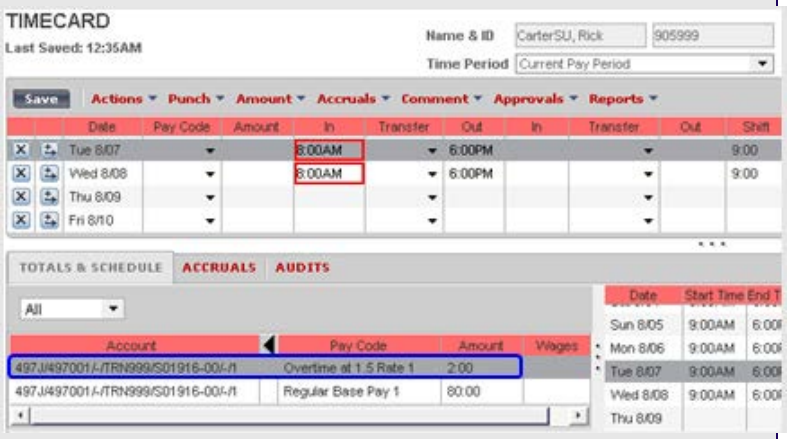
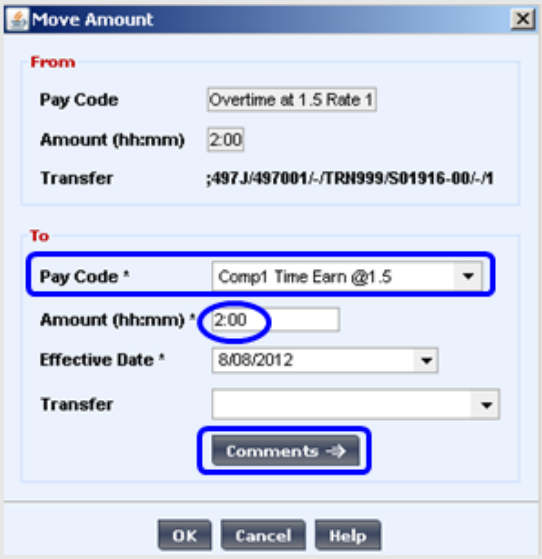
Steps		
4	Right select the **Overtime** pay code line in the **Totals & Schedule tab**.	
5	Select **Move**.	
6	From the **Pay Code** drop-down list select the Comp Time Earn code where you will move the overtime hours. • The correct Comp Earn code will be applied by the system based on EClass. For example Comp 2 is used by CWA and Police Bargaining units only. Verify the amount of hours which will be moved to the Comp Time Earn code.	

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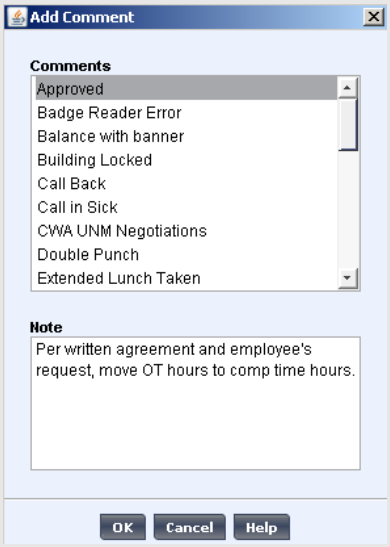
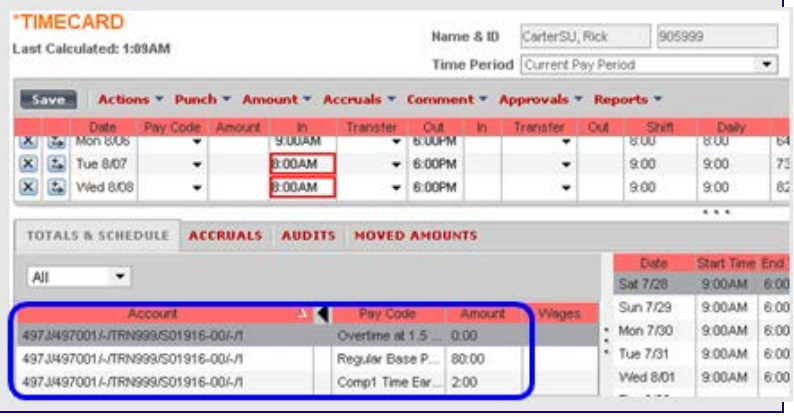
Steps		
7	Select on the **Comments** button, select appropriate comment, add Note if necessary. Select **OK**	
8	Select **OK**	
9	Select on **Actions**, select **Calculate Totals** to preview the change.	
10	Select **Save.**	

Special Instructions:

Moving amounts within LoboTime effectively requires that you make the move at the account level and that you designate the index that you are moving “to” (even if it is the same as the “from” index). In addition, the date of the movement is very important. Please read below to ensure this is done correctly. While LoboTime will allow managers to perform a moved amount from the Overtime (O/T) pay code to the Regular time pay code, the only moved amounts that should be made from the O/T pay code is to the Comp Time Earned pay code (if previously agreed to by the employee and their supervisor). The Fair Labor Standards Act requires the University to pay employees for overtime worked regardless whether it was pre-approved in advance or not. If overtime is worked but not pre-approved in advance, it must be paid at time and a half and addressed after the fact as a performance management issue. Please do not perform any moved amounts from O/T to Regular time.
Summary: Best Practice is to “Move” amounts within the “Totals & Schedule” section. Additionally you will need to change the “Effective Date” to the exact date when the hours have been accrued. In other words, change the effective date in the moved amounts dialog box. For a terminated employee this should be on or before the employee’s last day in the current pay period.

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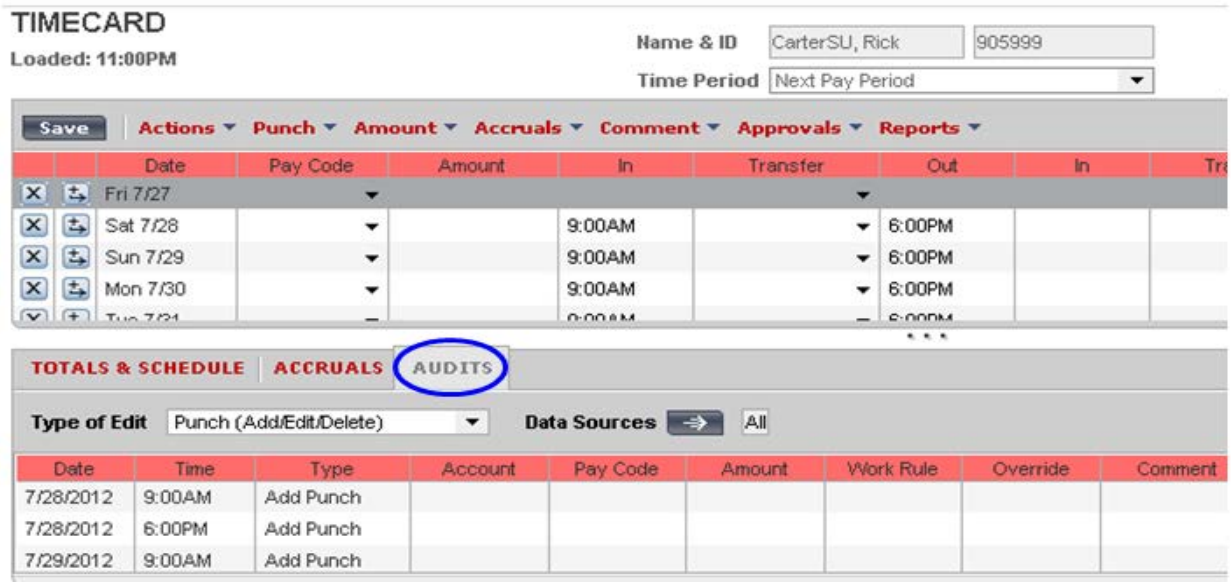
Viewing the Audit Trail

Purpose

The Audits tab is located at the bottom of the Timecard workspace. The tab lists all punches or amounts made to an employee's timecard and approvals made by Supervisors or Time Managers. The tab also lists punches made from timestamping. You can view all data sources, or a specific data source, such as edits to a timecard. Within a timecard, you can view all edits or a specific type of edit, such as punch edits. You want to review all manual edits that have been made to an employee's timecard.



Column	Description
Date/Time	The effective date and time of the edit
Type	The kind of edit that was performed
Account	The account to which the edit is attributed, if different from the primary account
Pay Code/Amount	The pay code and amount of hours to which the edit is assigned, if applicable
Work Rule	The work rule used with the edit, if different from the employee's primary work rule
Override	The type of entry that this edit is replacing or canceling, if applicable
Comment	The comment attached to the edit
Edit Date/Time	The date and time the edit was made
User	The user name of the person who made the edit
Data Source	The component of the application from which the edit was made

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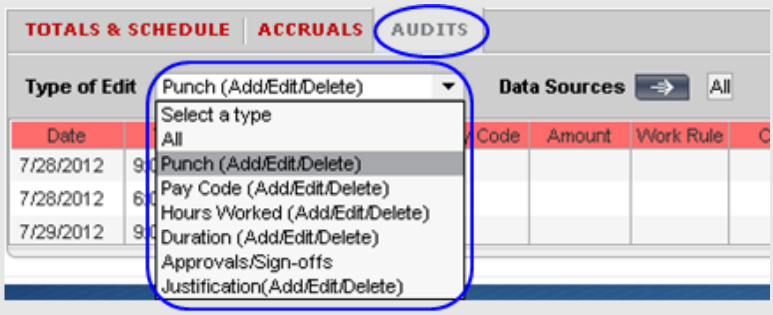
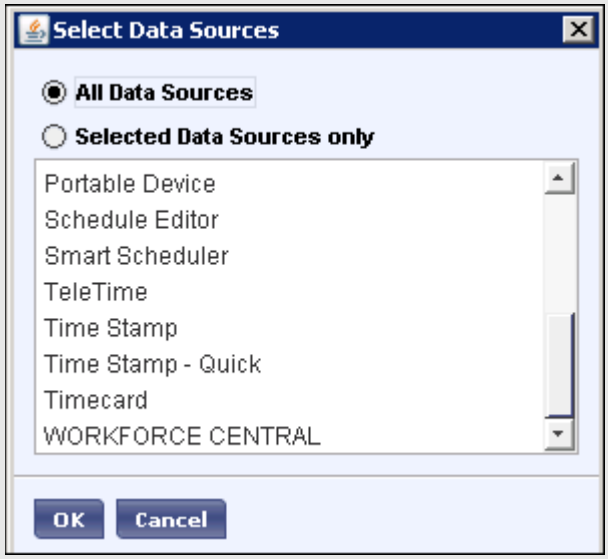
Steps

1	From a timecard, select the **Audits** tab.	
2	Select a type of edit or select **All** to display all types of edits from **Type of Edit** drop-down list.	
3	(Optional) Select the **Data Sources** arrow.	
4	In the **Select Data Sources** dialog box, select the source of the edit or leave it at the default **All Data Sources** to display all edit sources. Then select **OK**.	

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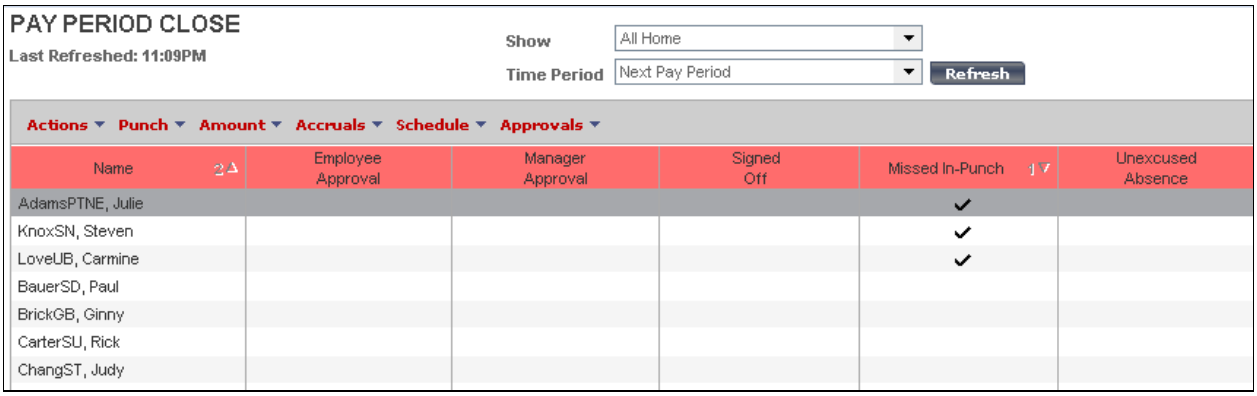
Steps

Finalizing Timecards

Reviewing Time Data at the End of the Pay Period

Purpose

The Pay Period Close widget helps you to identify timecard discrepancies at the end of a pay period so that you can perform final edits. You must correct all exceptions before time data is approved/signed off by departments and timecards are locked. Otherwise, employees may not get paid correctly for that pay period.



Approving Individual Timecards

Purpose

After you finish editing your employees' timecards, you need to approve them, which is the first of two steps necessary to indicate to Payroll that they are ready for processing. You can approve timecards from a widget or on a timecard itself. After you approve a timecard, the employee cannot make any edits to it unless you remove your approval.

Example

You notice that Rick CarterSU has approved his timecard for the current pay period. You have reviewed the employee's time data and performed all necessary edits. You approve the employee's time for the current pay period on his timecard.

Steps		
1	From the **Related Items** pane, select **Pay Period Close**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	

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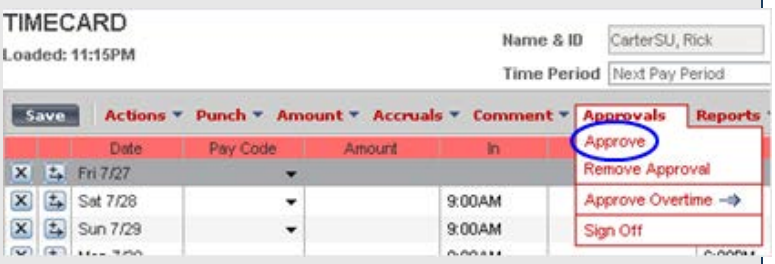
Steps		
3	Select the employee, right-select and then select **Timecard**.	
4	Select **Approvals > Approve**.	
5	Do you want to check the approval status on the timecard or the Pay Period Close widget? To confirm the approval status on a timecard, select the **Sign-offs & Approvals** tab and review the **Approval by Manager** information	
	To confirm the approval on the **Pay Period Close** widget, select **Refresh**, and review the **Manager Approval** column.	

Tip

You can remove your approval by following the same steps and selecting Remove Approval from the Approvals menu.

Business practice

Supervisors and Time Managers must approve AND signoff all timecards by 5pm on the Monday evening prior to the first payroll run, which pays the Friday of the same week.

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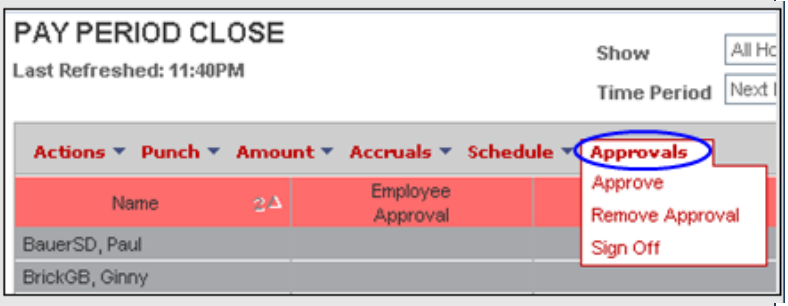
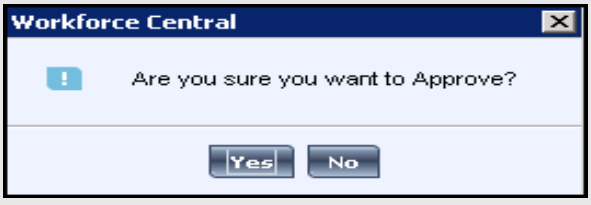
Approving Multiple Timecards

Purpose

Once you have reviewed and updated your employees' timecards, you can approve them all at once, rather than approving them individually. When you approve multiple timecards at once, use the Group Edit Results page to confirm that all of them are approved. If one or more of the timecards are not approved, the Details link on the Group Edit Results page identifies whose timecard was not approved and why.

Example

You have reviewed and completed final edits to your employees' timecards. You will approve them all at once.

Steps		
1	From the **Related Items** pane, select **Pay Period Close**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Do you want to approve timecards for all employees or specific employees? • To approve timecards for all employees, select **Actions > Select All**. • To approve timecards for specific employees, hold the **Ctrl** key and select each employee.	
4	Select **Approvals > Approve**.	
5	Select **Yes** to confirm your approval.	
6	Do you want to check the approval status on the timecard or the Pay Period Close widget? To confirm the approval status on a timecard, select the **Sign-offs & Approvals** tab and review the **Approval by Manager** information.	

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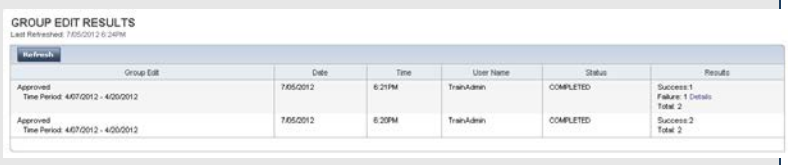
Steps		
	To confirm the approval on the **Pay Period Close** widget, select **Refresh**, and review the **Manager Approval** column.	
	You can also review the group approval status by viewing **Group Edit Results**. Select the **Back to…** button. Select **Group Edit Results**.	
7	If the Group Edit Results indicate that some timecards are not approved, select the **Details** link in the **Results** column and review the reasons why.	

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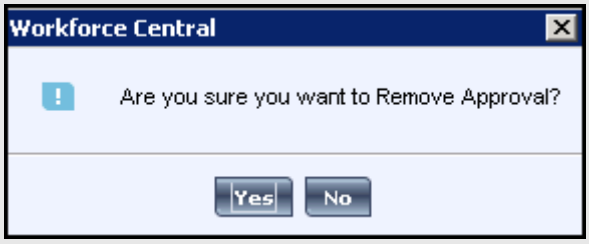
Removing Your Timecard Approvals

Purpose

After you approve one or more employees' timecards, they are no longer editable. If the need arises and you have the appropriate permissions, you can remove your approval. After you remove your approval, you can make the necessary timecard edits and then re-approve the timecards.

Example

You have been informed that an employee forgot to enter four hours of sick time for Wednesday of the current pay period. You have already approved the employee's timecard. You need to remove your approval, add four hours of sick time for that Wednesday, and then re-approve the timecard for that day.

Steps		
1	From the **Related Items** pane, select **Pay Period Close**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Select the employee.	
4	Select **Approvals > Remove Approval**.	
5	Select **Yes** to confirm that you want to remove your approval.	
6	Do you want to check the status of your action? • You can review the group approval status by viewing **Group Edit Results**. Select the **Back to…** button. Select **Group Edit Results**. • To confirm on a timecard that the approval is removed, select the **Sign-offs & Approvals** tab.	

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Business practice

If an employee has already approved their timecard, and it is necessary to make changes to the timecard, the Time Manager/Supervisor should communicate changes made to the timecard back to the employee.

Signing Off Timecards

Purpose

Signing off prevents unauthorized users from making additional edits to timecard data, which ensures accurate payroll processing. Before you sign off the data and begin payroll processing, you should perform a final validation of the timecard. After sign off, you can make no further edits to timecard data, including removing an approval. This restriction reduces the number of last-minute changes while you prepare to process payroll.
It is recommended as a best practice that timecards are signed off from a timecard although the system allows you to sign off from a Genie.

Example

It is the end of the pay period and you want to sign off employee timecards for your department/organization. You confirm the success of the sign off on the Group Edit Results page.

Steps		
1	From the **Related Items** pane, select **Pay Period Close**.	
2	Confirm that the timecard(s) have been approved by reviewing the **Manager Approval** column. You might need to select **Refresh** to display the most current information.	
3	Do you want to sign off timecards for all employees or specific employees? • To sign off timecards for all employees who appear in the **Pay Period Close** widget, select **Actions > Select All**. • To sign off timecards for specific employees, hold the **Ctrl** key and select each applicable employee.	
4	Select **Approvals > Sign Off**.	

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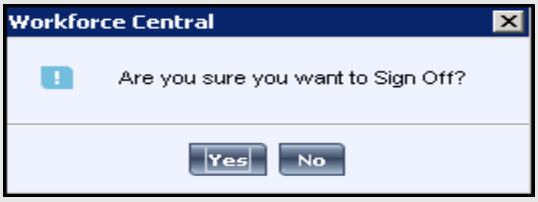
Steps		
5	Select **Yes** to confirm the sign off.	
6	Do you want to confirm the status of your sign off on a timecard or from the **Pay Period Close** widget? To confirm the sign-off status on a timecard, select the **Sign-offs & Approvals** tab and review the **Sign Off** information. To confirm the sign-off status from the **Pay Period Close** widget, select **Refresh**, and review the **Signed Off** column. To confirm the status of a group sign off, select the **Back to…** button, select **Group Edit Results**, and then review the **Signed Off** information.	
7	If the Group Edit Results indicate that some timecards are not signed off, select the **Details** link and review the reasons why.	

Terminated Employee Business Process

There are multiple ways that a job can end and the supervisor or time manager no longer sees them in their active lists in LoboTime after midnight on the day of the termination. It is recommended you make this a part of your bi-weekly and monthly process before each payroll deadline.

Example

It is the end of the pay period and you want to sign off employee timecards for your department/organization including terminated employees.

Steps		
1	**Employee Approval** Employee needs to approve their timecard in LoboTime on their last day	

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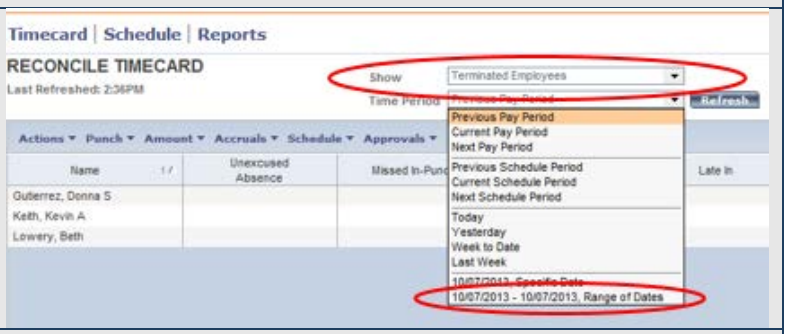
Steps		
2	**Manager Approval** Supervisor or Time Manager to approve the terminated employee's timecard in LoboTime on their last day	
3	Employee is terminated in Banner Confirm the employee is terminated in LoboTime as of midnight on the Job End Date in Banner.	
4	Sign-off on timecard for terminated employee Search for the terminated employee by selecting "Reconcile Timecard" or "SignOff Issues" in the "Manager Genies"	
5	Reconcile Timecard search Select the dropdown arrow to the right of "Show" > Select "Terminated Employees" Select the dropdown arrow to the right of "Time Period" > Select "Previous Pay Period"	
6	Time Manager Sign-Off Select terminated employee in the list > select Timecard > Sign-Off the terminated employee's timecard in LoboTime by the Payroll Deadline.	
7	Cancel or Delete all future "Approved" leave requests from the Schedule Editor. Future leave request data can come through on payroll feeds so they should be deleted. Select Schedule Editor from the Manager Genie	

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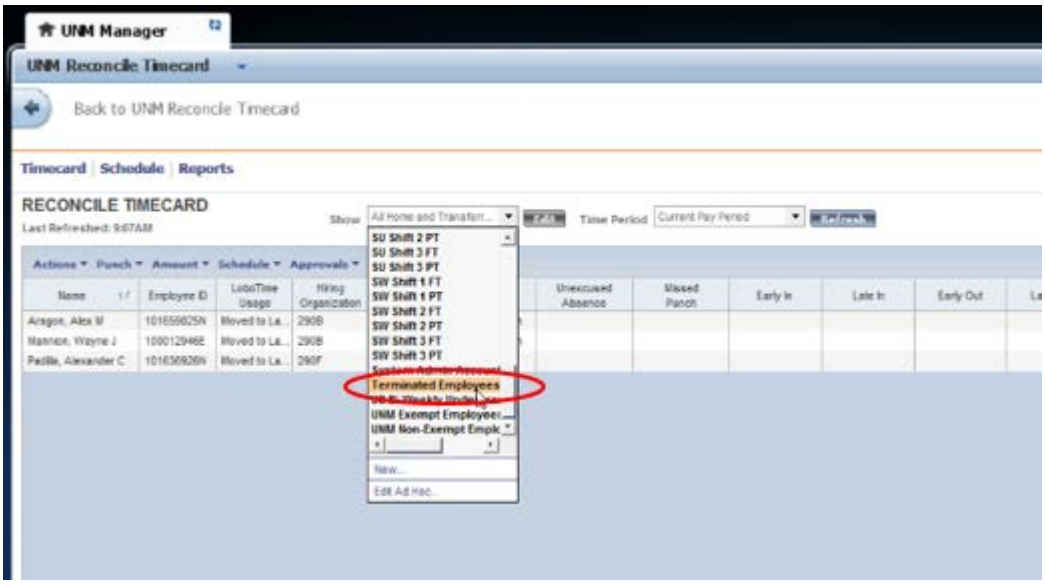

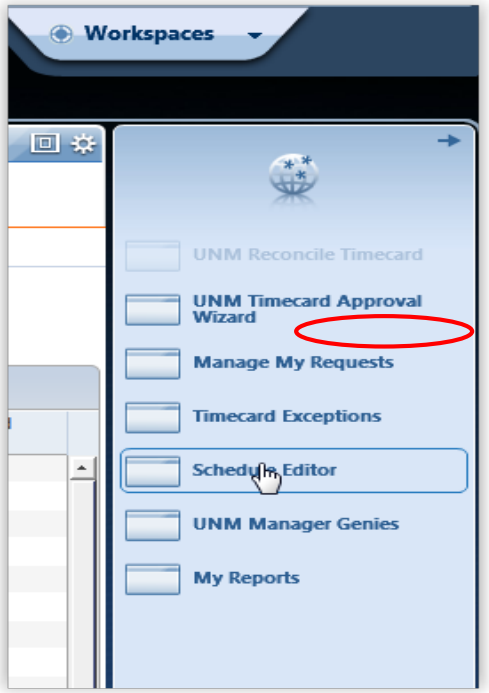

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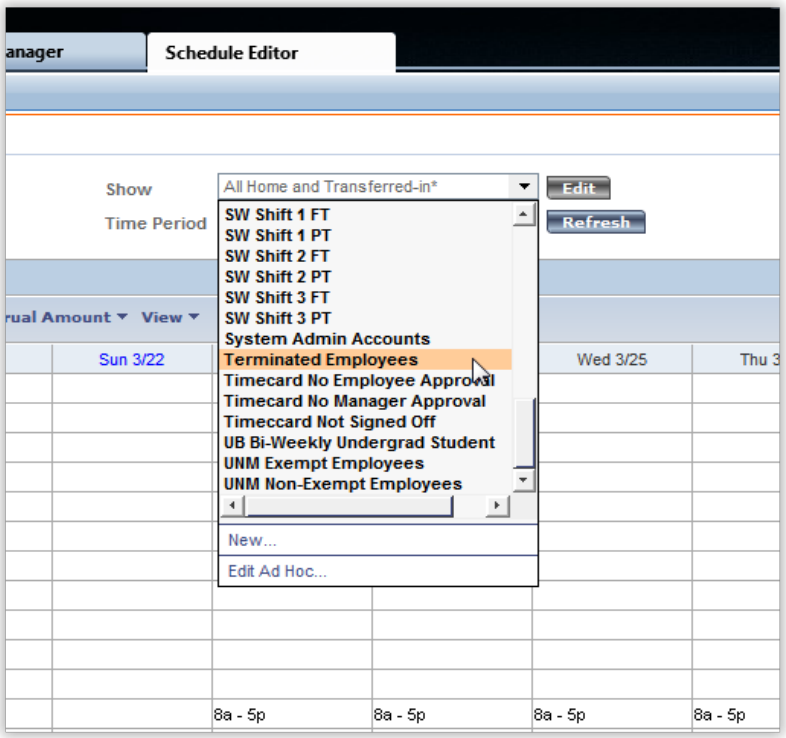
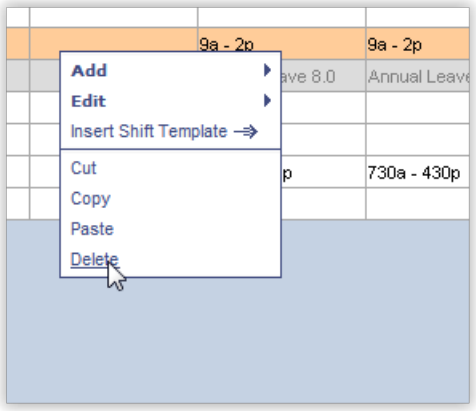


Highlight annual leave > Right Click > Delete



Early Payroll Deadlines and Projecting Future Time

Purpose

Early payroll deadlines are the same in LoboTime as they are in Banner Department Time Entry.

Each department will need to establish a process for their department in order to meet the early payroll deadlines due to holidays and bank closures.

For example, if there is an upcoming Friday, 5PM deadline for having time entered, approved and signed-off in order to get their employees paid on time for a 2R bi-weekly pay period.

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Guidelines for entering projected time in LoboTime due early payroll deadlines:

Since employees cannot enter projected punches in LoboTime, it will be the responsibility of Supervisors or Time Managers to enter the hours.

- If the expected sign-off by the manager will precede any hours that are scheduled to be worked, the manager will need to enter the time in the employee's timecard for the projected hours through the last day of the pay period.
- Highlight the applicable row in the timecard
- A manager can do one of the following methods to enter hours in the timecard per the projected schedule:
    - Enter each In-Punch and Out-Punch time (you do not also need to enter a Pay Code)
    - Select "Save"
    - The applicable number of hours will populate in the Totalizer

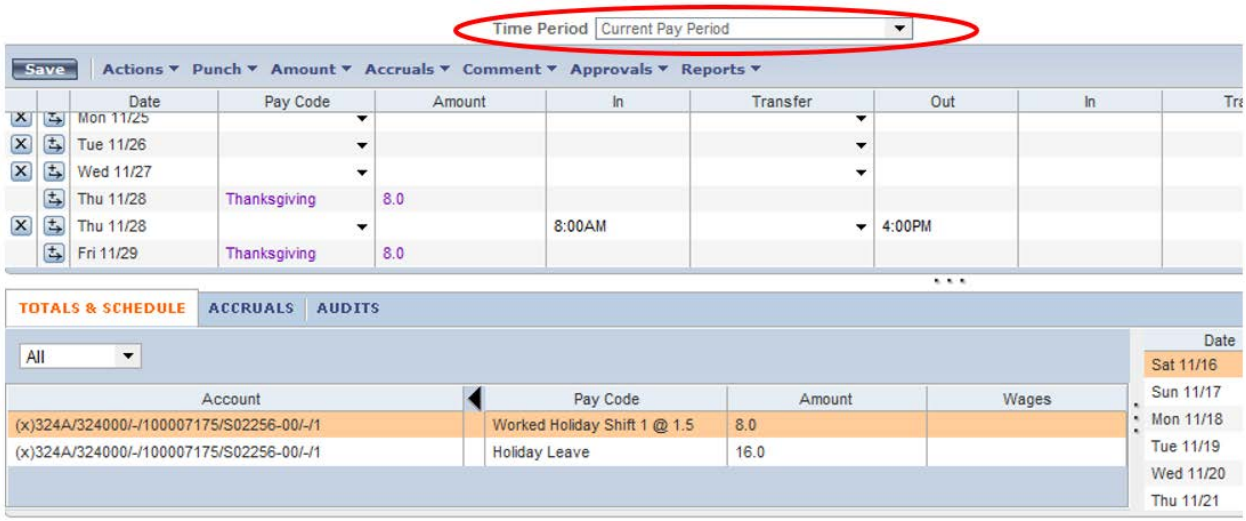
OR

    - The system will allow a user to enter a Pay Code and total estimated hours worked for each day (rather than entering in/out punches), however be aware that if you use this technique, Overtime hours and Worked Holiday Hours @ 1.5 may not calculate.
    - Select the correct Pay Code based on the employee's EClass in Banner
    - E.g. for SN staff use "Regular Base Pay Shift" from the drop down menu in the Pay Code column
    - Enter the number of hours within the "Amount" column.
    - Select "Save"
    - The applicable number of hours will populate in the Totalizer

- **Please Note**:
    - Sign-offs cannot be removed after the payroll deadline has passed. If a change to an employee's time is necessary a Payroll Adjustment Form will need to be submitted in order to change the employee's timecard data.
    - If time has been projected the employee should NOT record their time using a PC or Clock on these days.

To accommodate for this early deadline, LoboTime will allow for an early sign-off within the current pay period typically starting on a Wednesday, at 9am through 5pm Friday deadline day.

An out-punch on the early deadline Friday may need to be estimated/projected for employees that are working this day.



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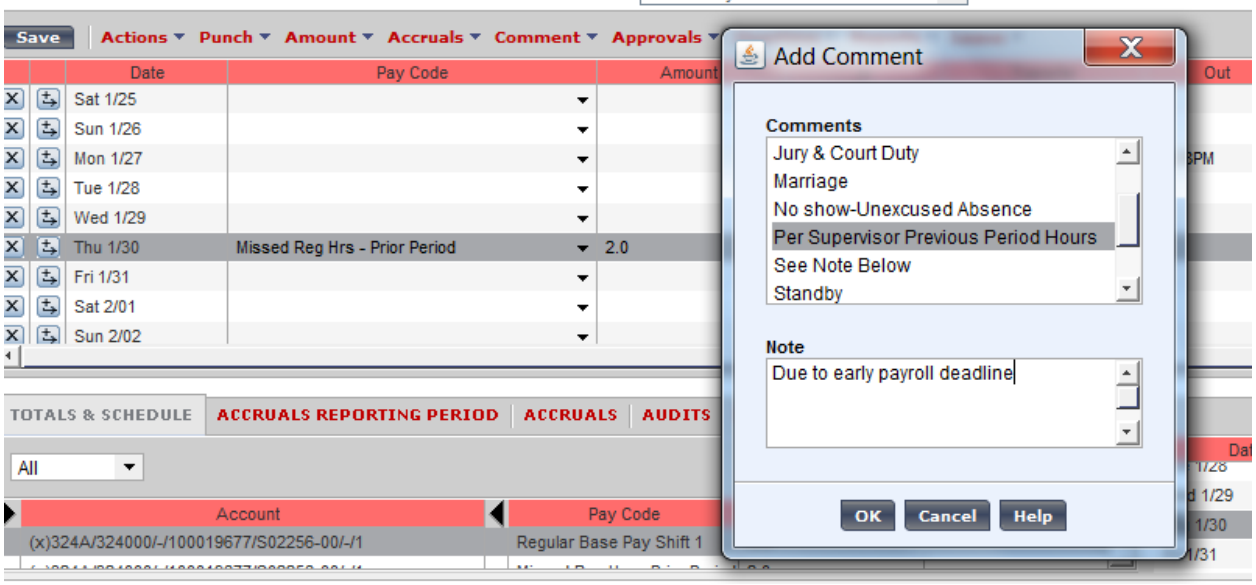
An evaluation of hours worked versus hours reported should be completed:

- For time that was understated or for missed hours managers should use the “Missed Shift 1, 2, or 3 Prior Hours” pay code in the timecard for the next open pay period.
    - Use Pay Code “Missed Shift 1 Prior Hours”
    - Use Pay Code “Missed Shift 1 Prior OT @ 1.5”
    - Use applicable shift when selecting the Pay Code from the drop down list in the timecard.



- For time that was overstated a manager should submit a payroll adjustment for the difference in hours.

Holiday Leave

Guidelines for projected time working on a Holiday:

- If not projecting time, no additional action is required.
- Employee chooses up-front to receive holiday hours in addition to their scheduled work hours and they are not deferring holiday hours to another day.
- Select the "Add a row" button on the same day as the holiday

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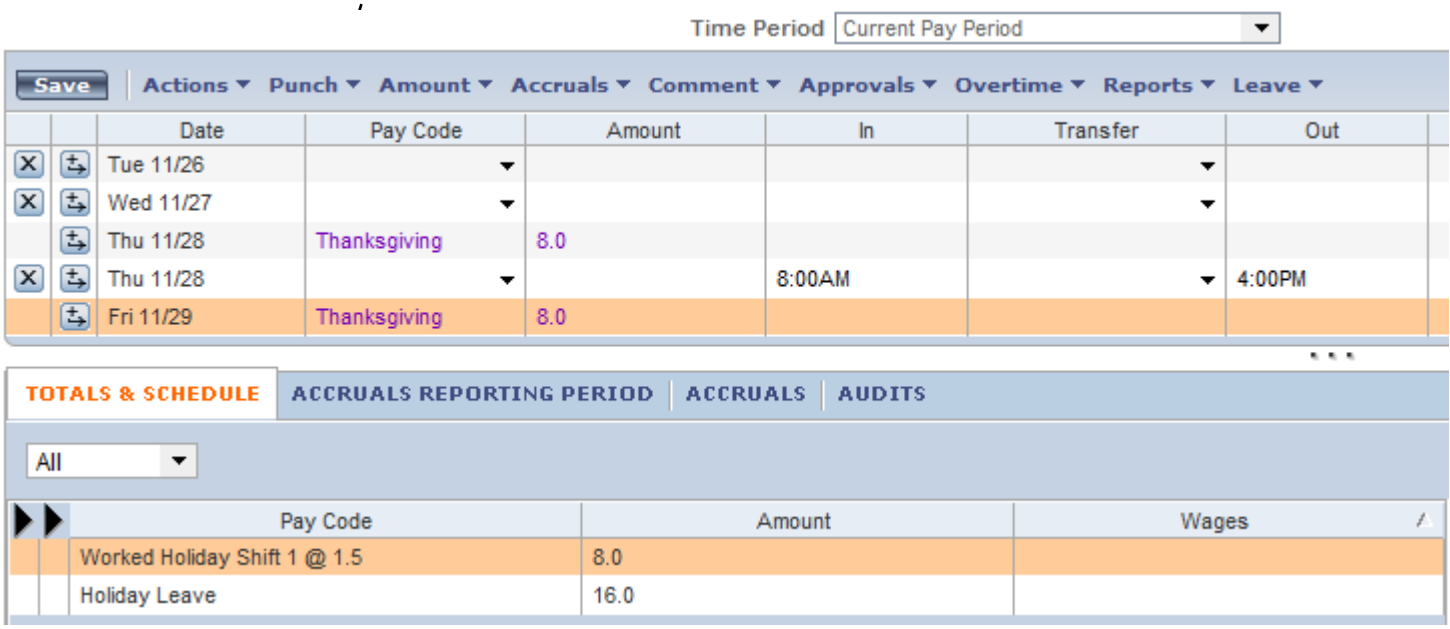

- Enter in-punch(es) and out-punch(es) for the projected scheduled times (you do not also enter a Pay Code)
- Pay Code for “Worked Holiday Shift @ 1.5” will automatically populate in the Totalizer
- Pay Code for Holiday Leave will automatically populate in the Totalizer

Holiday Hours Deferred

Employee chooses up-front to take their Holiday hours on another day: (Defer holiday hours to another day) If not projecting time, skip to step 4 for example if an employee’s normal day off per schedule falls on a UNM Holiday.

- "Add a row" on the same day as the holiday
- Enter In-Punch and Out-Punch out for the projected scheduled times (do not enter a Pay Code)
- Pay Code for “Worked Holiday Shift @ 1.5” will automatically populate in the Totalizer
- "Add a row" on the same day as the holiday
- Select “Holiday Leave” from the drop down menu in the Pay Code column on the newly added row
- Enter the number of hours with a negative (dash) in the “Amount” column.
  - **Note: This should be the only time you use a negative amounts to correct timecards**
- Select "Save"
- The applicable number of hours should populate for Holiday Leave in the Totalizer

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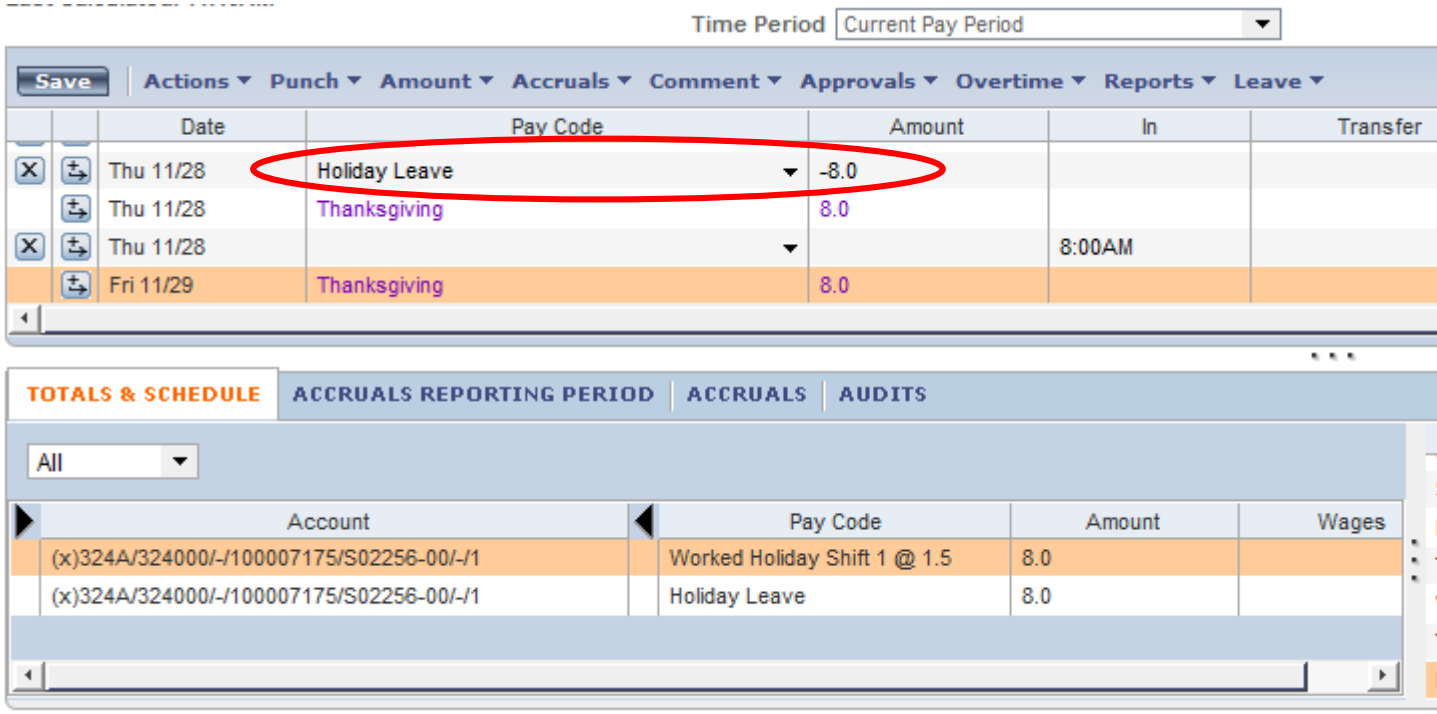

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Guidelines for entering Holiday Hours other than on a UNM scheduled Holiday:

- "Add a row" in the timecard on the day the employee is taking their holiday hours
- Select “Holiday Leave” from the drop down menu in the Pay Code column on the newly added row
- Enter the number of hours within the “Amount” column.
- Select "Save"
- The applicable number of hours will populate for Holiday Leave in the Totalizer

If an employee works an unscheduled shift on a designated UNM Holiday and the timecard has already been signed off the manager should submit a Payroll Adjustment Form.
If you have questions on policy associated with holidays, please contact your HR Consultant.

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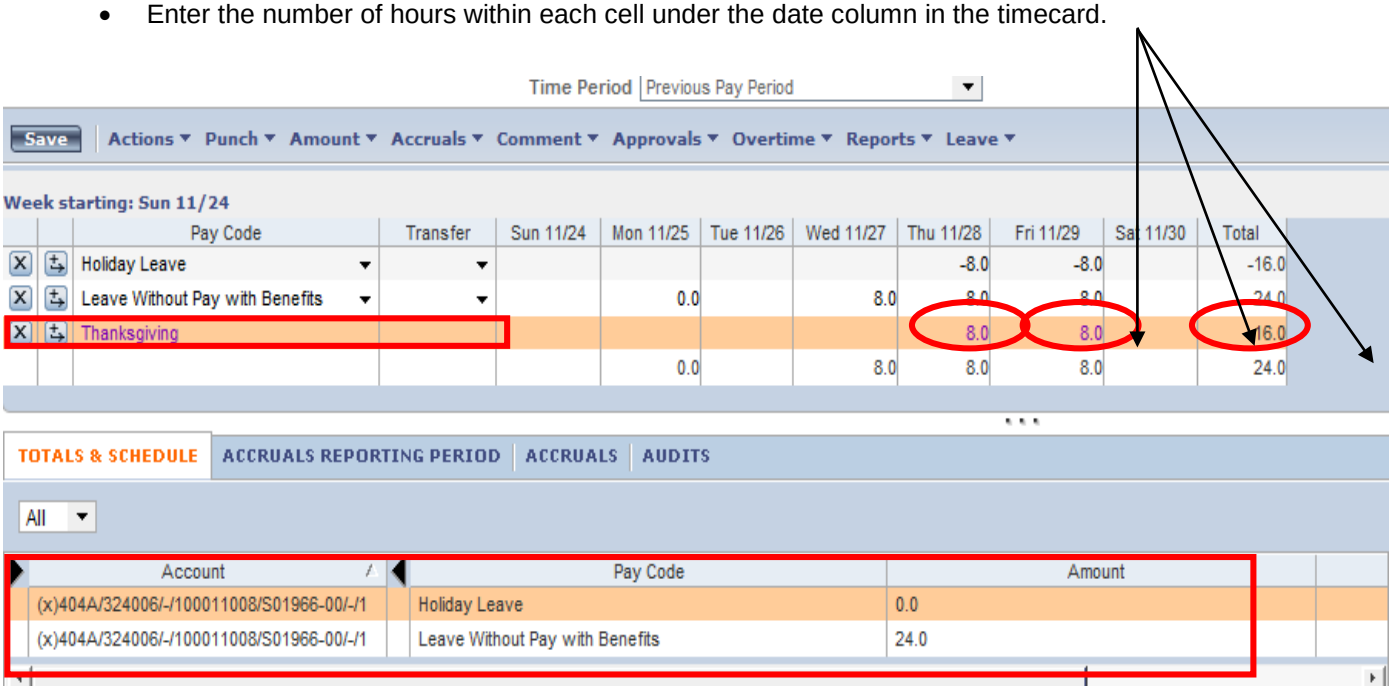
Guidelines for entering Leave without Pay (LWOP) surrounding a UNM scheduled Holiday:

EXEMPT: Entering LWOP in lieu of the holiday

- "Add a row" on the same day as the holiday
- Select “Holiday Leave” from the drop down menu in the Pay Code column on the newly added row
- Enter the number of hours with a negative (dash) in the “Amount” column > Select "Save"
- The applicable number of hours will populate for Holiday Leave in the Totalizer
- Again "Add a row" in the timecard on the day the employee is using LWOP
- Select “Leave without Pay with Benefits” from the drop down menu in the Pay Code column on the newly added row
- Enter the number of hours within each cell under the date column in the timecard.



- Select "Save"
- The applicable number of hours will populate for “Leave without Pay with Benefits” in the Totalizer

For Exempt Employees - The reduction of hours will be applied to the pay check that also reflects other exception time. For example: if an employee took LWOP on Monday November 18th it will be reflected in their December 20th check date.

NON-EXEMPT Encountering an Unexcused Absence before or after the holiday:

If an employee does not work the scheduled day before the holiday

- The LWOP Earn/Pay Code should be used only if the employee elects “Leave without Pay” instead of using “Sick” or “Annual”.
- If the department does use LWOP instead of an unexcused absence the above instructions need to be used to back out the holiday hours.
- Print the Time Detail Report and have the employee sign the timecard for acknowledgment of any unexcused absences for documentation purposes.
- It is highly recommended that the day be left as an “Unexcused Absence” in the timecard which is identified by a red outlined box around the day.

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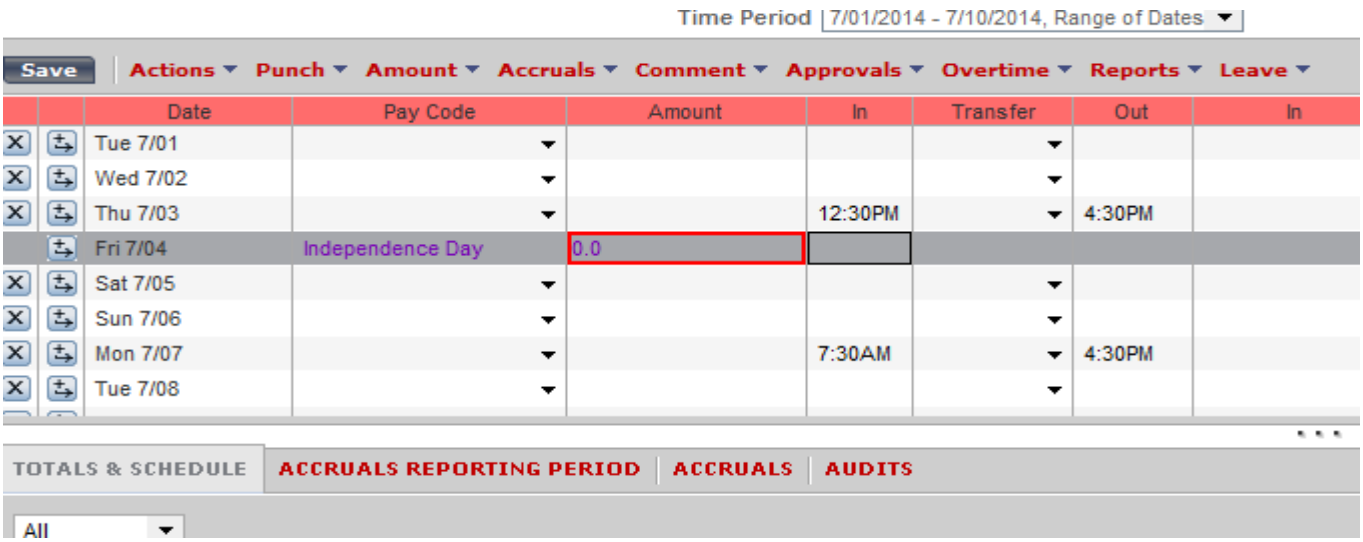
Please Note: (for both Exempt and Non-Exempt):

- If an employee has LWOP the scheduled day before or the day after the holiday they are not eligible for the holiday hours.
- Only enter LWOP for intermittent leave in LoboTime, do not use the Earn/Pay Code when the employee is on "B" status in Banner.
- As a general rule, intermittent LWOP is entered on the day that it is used.
- For excused absences use "Sick" or "Annual" leave as appropriate.

If applicable Holiday hours are showing as "0" in the timecard for "Next Pay Period":

- At the start of the pay period which includes the holiday, the "Holiday Leave" pay code will populate in Non-Exempt timecards.
- For employees with a schedule, once the hours have been projected and entered for the day before the holiday it is expected the "Holiday Leave" hours will also populate in their timecards on the applicable days.
- If the hours are still not populating, enter a punch on the next scheduled day after the holiday. For most employees it is necessary to enter their projected typical In-Punch time according to their schedule.
- Please contact LTPAY@unm.edu immediately if you are still not able to see the holiday hours in each timecard.
- Do not sign off on timecards if the holiday hours are not displaying or calculating correctly.



Navigating the Schedule Editor

Purpose

LoboTime includes the Schedule Editor where you schedule worked and non-worked hours. Using the Schedule Editor, you can:

- Add, edit, and delete shifts
- Add pay codes for worked or non-worked hours
- Schedule labor transfers

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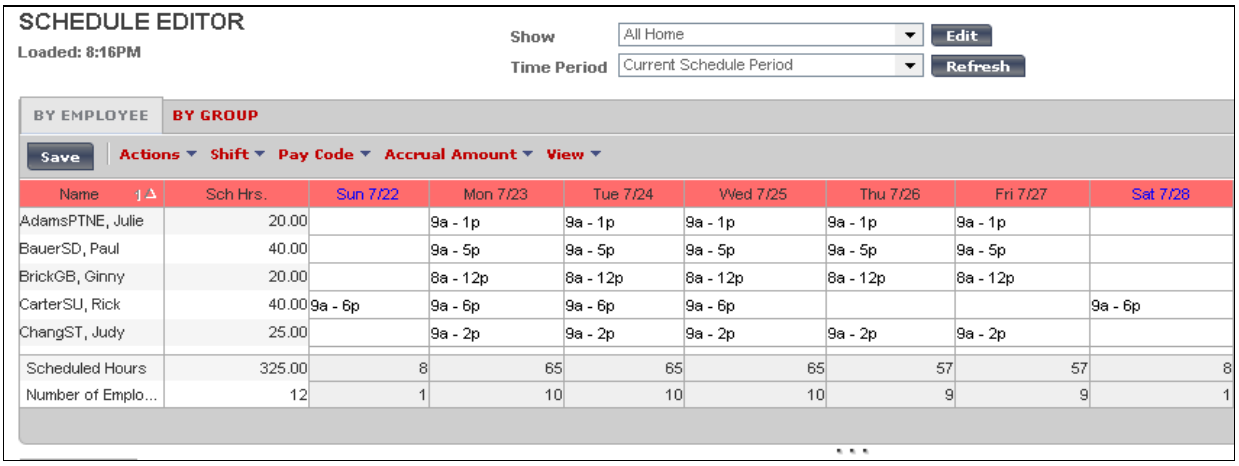

Areas	Description
Name column	Lists the employee names.
Sch Hrs. column	Displays total number of scheduled hours by employee for the selected time period, with lunch deducted if applicable.
Date cells	For each day in the selected time period, displays shift start and end. A date cell can also display pay codes to identify scheduled non-worked hours.
Scheduled Hours row	Displays total number of scheduled hours for all employees for the selected time period and for each date displayed.
Number of Employees row	Displays the total number of employees used to calculate total Scheduled Hours.

Tip

Schedule Editor builds a schedule pattern. The pattern is built on the “person”. An example of a schedule pattern is 9a – 5p Monday – Friday.

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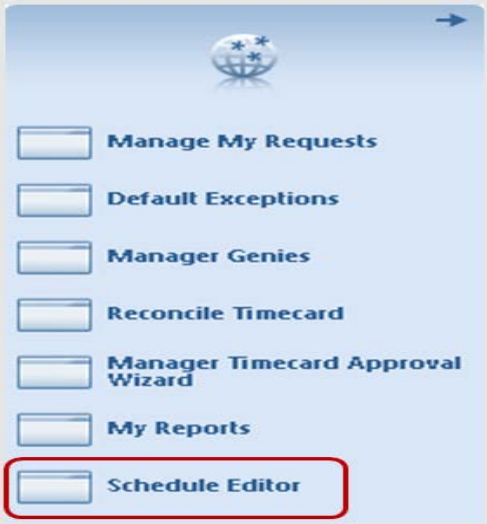
Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select **All Home** from the **Show** drop-down list to view all the employees you are authorized to view.	
3	Select the specific time period from the **Time Period** drop-down list. (The default is **Current Schedule Period**.)	

Creating Schedules Using Pattern Templates

Purpose

Schedule patterns let you quickly apply a set of shifts to employees who work the same shifts on a regular basis. A schedule pattern consists of one or more shifts that repeat over a specified time period. When you create schedules for employees who have a schedule pattern, you can add the shift days and times manually or use a predefined pattern template. The pattern template defines the pattern of the shifts' days and times and makes it easier and faster for you to create the employees' schedules.

Example

You want to permanently schedule Raul SanchezSW to work 9:00 A.M. to 2:00 P. M. Monday through Friday every week, starting Monday of the current schedule period. You know that a pattern template exists that defines this schedule pattern, so you will use it because it is easier and faster than adding the schedule manually.

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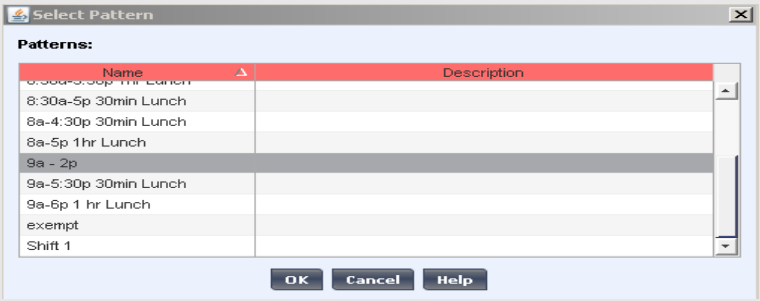
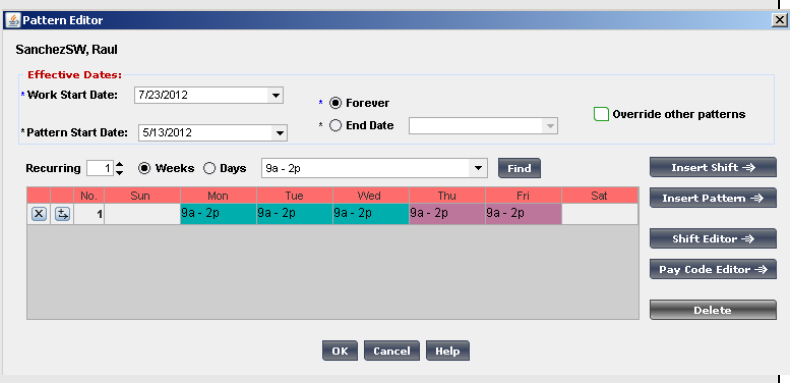
Steps

1	From the **Related Items** pane, select **Schedule Editor**. Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
2	Select the Raul SanchezSW who you will schedule using a pattern template. To select multiple employees, hold the **Ctrl** key and single-select each employee's name.	
3	Select **Shift** > **Add Pattern** (To update or change a pattern previously built in a prior pay period follow the instructions above to add a new pattern. Selecting the "override other patterns" will replace the old pattern with the new pattern)	
4	Select **Insert Pattern**.	
5	Select a pattern from the list and select **OK**.	
6	From the **Work Start Date** drop-down list, specify the effective date on which the employee(s) starts working the pattern.	
7	From the **Pattern Start Date** drop-down list, specify the effective date on which the pattern starts.	
8	From the **End Date** drop-down list, specify the last date the pattern will be effective. To have the pattern in effect with no end date, select **Forever**.	
9	Select **OK** > **Save > Refresh**	

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Tip

Work Start Date and Pattern Start Date will be the same date.

Refreshing and Saving Data

Purpose

When you add and modify schedule data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can cancel your edits if necessary.

Visual indicators

When you edit a schedule, the page name turns orange and an asterisk appears next to it to let you know that your edits are not yet saved. After you save, the visual indicators no longer appear.

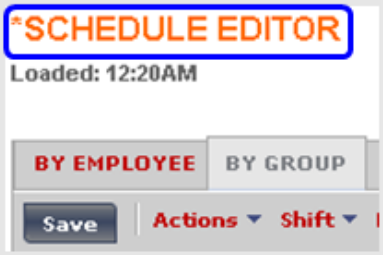
Canceling edits

The application does not save your edits until you tell it to do so. Until that time, you can remove or cancel your edits using the Refresh button. When you select Refresh, the application redisplays the most recently saved information, overwriting all of your unsaved edits.

Saving edits

When you are satisfied with your edits, you must save them. If you close the employee's schedule before you save the edits, they are not saved.

Canceling edits

Steps		
1	Perform your edits to a schedule. Note the visual indicators that indicate unsaved data.	
2	Select **Refresh** and review the schedule information.	
3	Do you want to cancel your changes? • To cancel your changes, select **Yes**. • To keep your changes, select **No**.	

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Saving edits

Steps		
1	Perform your edits to a schedule. Note the visual indicators that identify unsaved data.	
2	Select **Save**.	
3	Review the employee's schedule to ensure that the visual indicators no longer appear, validating that your information was saved.	

Tip

Remember the data in Schedule Editor does not automatically save, you must save your data to record your work.

Adding Shifts by Inserting a Shift Template

Purpose

You can add a shift by entering the start and end times directly into the date cells in the Schedule Editor. If the shift times are standard for The University of New Mexico, you might have a shift template that you can use. Shift templates define the start and end times of standard shifts that employees work regularly. A shift template does not include specific days or dates.

Example

You review your workload and notice that you need your employee, Raul SanchezSW, to work the 8:00 A.M. to 12:00 P.M. shift on second Monday and Tuesday of the current schedule period. You know that there is a shift template that defines the start and end times for this shift. You will insert the shift template when you schedule one of your employees to work the shift.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Locate the employee's row and select the cell in the row and under the date where you want to add a shift.	

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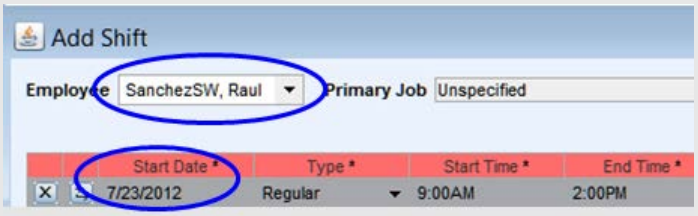
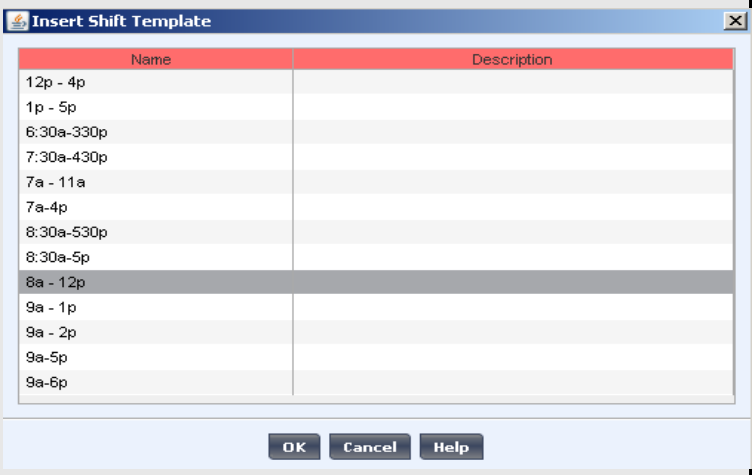
Steps		
4	Select **Shift > Add**	
5	In the Shift Editor, confirm that the correct employee's name appears in the **Employee** field and the correct scheduling date appears in the **Start Date** field.	
6	Is there a shift template available for this shift assignment? • If a shift template is available, select **Insert Shift**. Select the appropriate shift and select **OK**. Continue to step 11. • If no shift template is available, continue to step 7.	
7	From the **Type** drop-down list, select the shift type for the first segment.	
8	In the **Start Time** field, enter when the shift begins and press **Tab**.	
9	In the **End Time** field, enter when the shift ends and press **Tab**.	
10	Confirm that the date in the **End Date** field is correct. If the shift segment crosses a day divide, change the shift's end date to the following day.	

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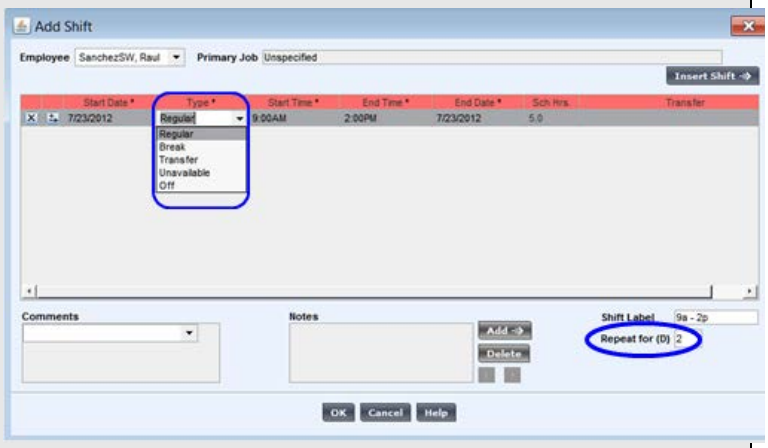
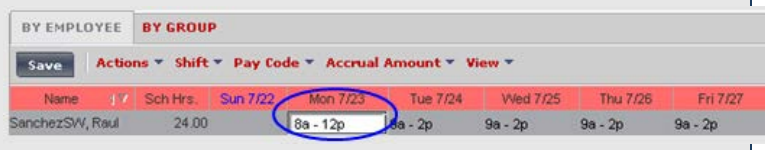
Steps

11	Confirm that the amount in the **Sch Hrs** column equals the total hours for this segment.	
12	Do you want to add additional segments to this shift? • To add additional segments, for each additional segment, select the **Insert Row** icon and complete steps 7–11. • To add no additional segments, continue to step 13.	
13	Enter the number of days you want to schedule this shift.	
14	Select **OK** and then select **Save**.	

Tip

You can enter time using either 12-hour or 24-hour time formats. For example, you can enter 8:00 A.M to 5:00 P.M. as 0800-1700 or 8a-5p. The configuration of the system determines the default time format. You can also copy and paste shifts using Ctrl-C and Ctrl-V.

Business practice

Always look for a shift template first when scheduling employees' shifts. Several shift templates have been created. If a shift template is not available, the recommendation is to key the data in as needed.

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Editing Shifts Using the Shift Editor

Purpose

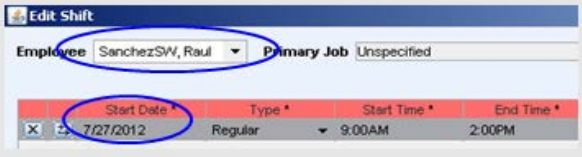
When creating and editing more complex schedules use the Shift Editor. It has tools that make it easier for you to create and edit shifts with several segments, shifts with transfers, shifts that cross the day divide, and other complex shifts.

Example

On the first Friday of the current schedule period, you need Raul SanchezSW to work the following shift segments:

- Regular shift from 8:00 A.M. to 12:00 P.M.
- No break

Use the Shift Editor to add the shift to the employee's schedule for the first Friday of the current schedule period.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Locate the employee's row and select the cell in the row and under the date where you want to add a shift.	
4	Select **Shift > Edit**	
5	In the Shift Editor, confirm that the correct employee's name appears in the **Employee** field and the correct scheduling date appears in the **Start Date** field.	

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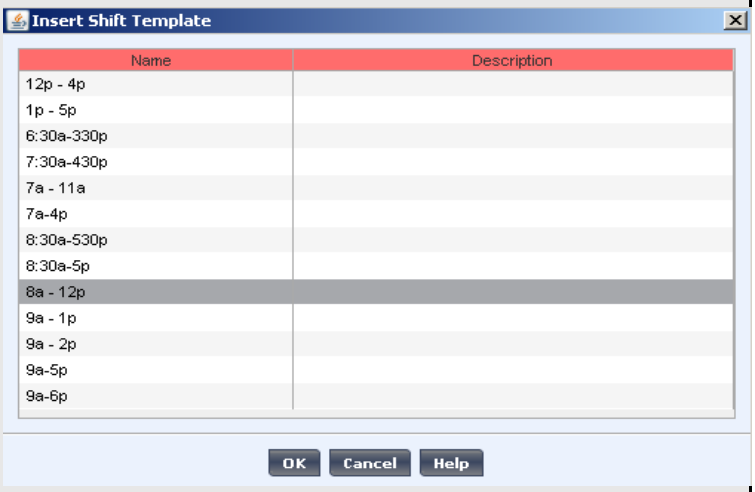
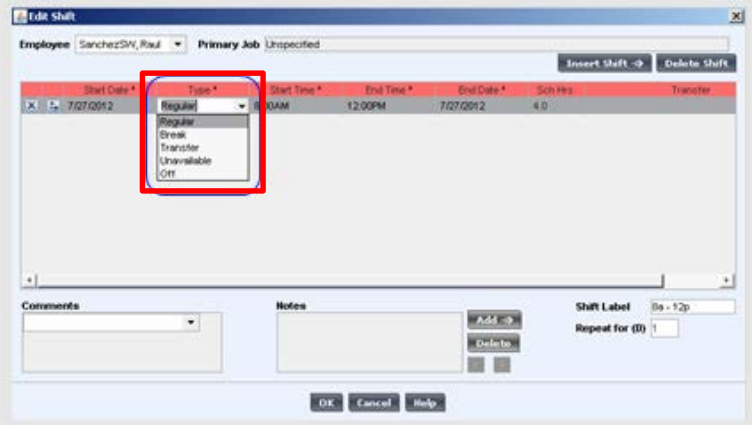
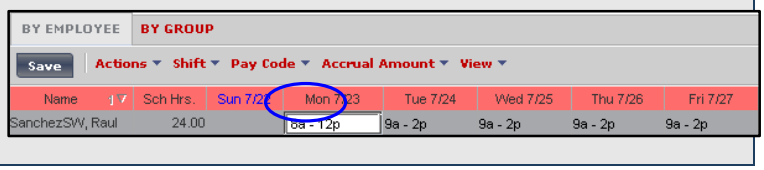
Steps

6	Is there a shift template available for this shift assignment? • If a shift template is available, select **Insert Shift**. Select the appropriate shift and select **OK**. Continue to step 11. • If no shift template is available, continue to step 7.	
7	From the **Type** drop-down list, select the shift type for the first segment.	
8	In the **Start Time** field, enter when the shift begins and press **Tab**.	
9	In the **End Time** field, enter when the shift ends and press **Tab**.	
10	Confirm that the date in the **End Date** field is correct. If the shift segment crosses a day divide, change the shift's end date to the following day.	
11	Confirm that the amount in the **Sch Hrs** column equals the total hours for this segment.	
12	Do you want to add additional segments to this shift? • To add additional segments, for each additional segment, select the **Insert Row** icon and complete steps 7–11. • To add no additional segments, continue to step 13.	
13	Select **OK** and then select **Save**.	

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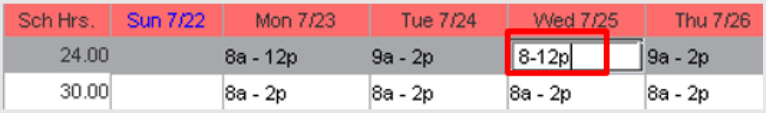
Editing Scheduled Shifts in Cell Editing

Purpose

When events in employees' lives occur that require them to take time off and when your workload requirements vary, you will need to change employees' schedules. You need to keep the schedules accurate to reduce the number of exceptions that might appear in employee timecards.

Example

Your workload requirements have changed on Wednesday of the second week in the current period. Raul SanchezSW has volunteered to change his schedule to satisfy the new requirements. Change his regular shift to 8:00 A.M. to 12:00 P.M.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Locate the employee's row and select the cell in the row and under the date that contains the shift that you want to edit.	
4	Edit shift start and/or end times and press **Tab**.	
5	Select **Save**.	

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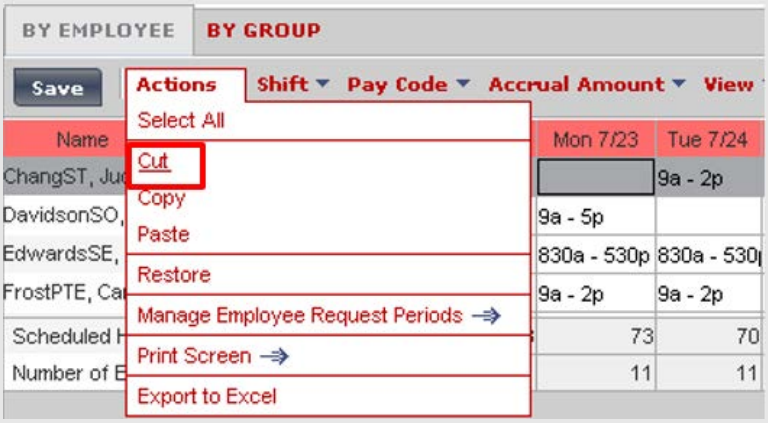
Deleting Shifts from Employees' Schedules

Purpose

Employees sometimes are unable to work a scheduled shift. When this happens, you need to delete the shift from the employee's schedule to prevent the application from flagging the employee as absent without an excuse.

Example

Julie ChangST mentioned that she will be unable to work Monday of the schedule period because she needs to attend her brother's out-of-town wedding. Access the Schedule Editor and delete the employee's schedule for Monday of the schedule period.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Locate the employee's row and select the cell in the row and under the date that contains the shift you want delete. (In this exercise you will select Judy ChangST.)	
4	Select **Actions > Cut**.	
5	Select **Save**.	

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Restoring Deleted Shifts

Purpose

If an employee's plans change or a shift was deleted in error, you can restore the shift if it belongs to a pattern. Use the Restore feature on the Actions menu to insert the original shift into the employee's schedule.

Example

Julie ChangST's plans have changed and she will be able to work the Monday of the next schedule period after all. Access the Schedule Editor and restore the shift in the employee's schedule for Monday of the next schedule period.

Steps		
1	From the **Related Items** pane, select **Schedule Editor**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Locate the employee's row and select the cell in the row and under the date where you want to restore the shift.	
4	Select **Actions > Restore**.	
5	Select **Save**.	

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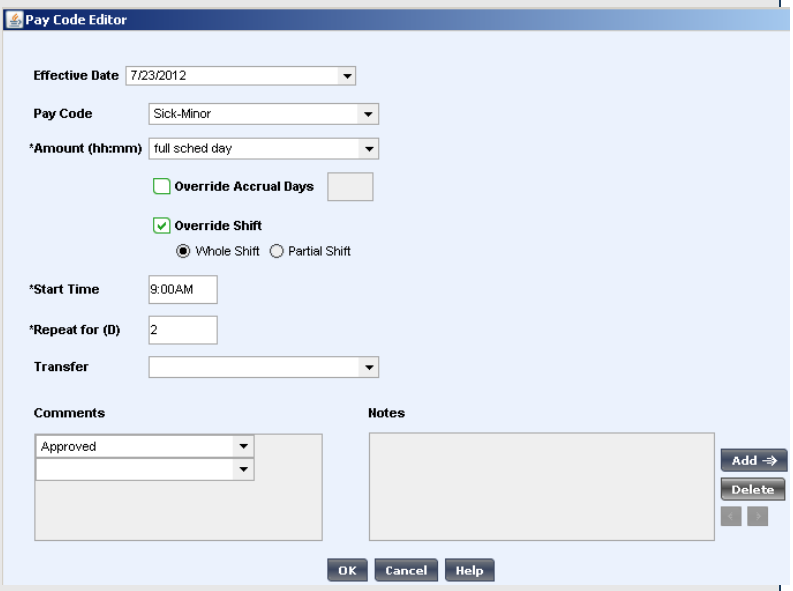
Steps

5	In the **Effective Date** field, confirm the date selected. (Or, if incorrect, enter the correct date.)	
6	From the **Pay Code** drop-down list, select the pay code.	
7	In the **Amount** field, do one of the following: • To schedule a specific number of hours, enter the amount of hours in the field • To schedule the entire number of hours the employee is scheduled to work that day, select **full sched day** from the drop-down list • To schedule half of the number of hours the employee is scheduled to work that day, select **half sched day** from the drop-down list	
8	(Optional) If the non-worked hours must replace the employee's existing shift, select the **Override Shift** check box and do one of the following: • To override the employee's entire shift, select Whole Shift • To override part of the employee's scheduled shift, select Partial Shift	
9	In the **Start Time** field, enter the effective time for the non-worked hours. If the employee already has a schedule, the shift start time is the default.	
10	In the **Repeat for (D)** field, enter the number of consecutive days this edit applies. For example, if the employee has requested five consecutive days of vacation, enter 5.	
11	Select **OK** and then select **Save**.	

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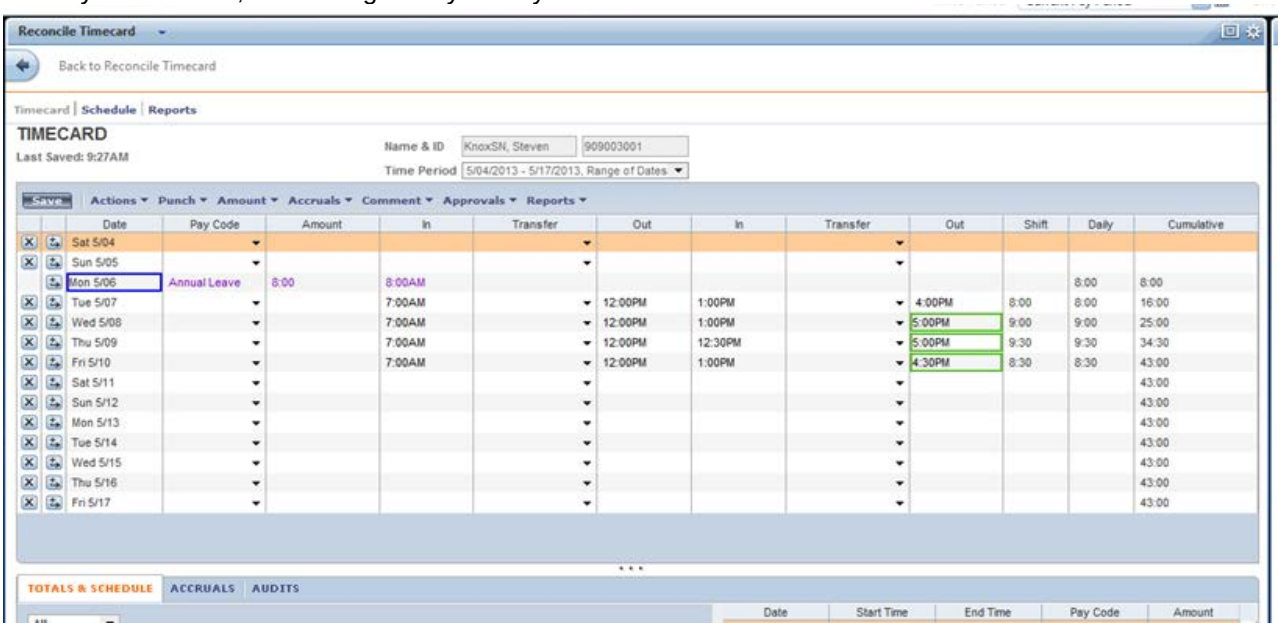
Minutes reported	Rounding to tenth	Real time example	Rounded to
1-3 min	0=0 min	8:03 AM	8:00 AM
4-9 min	0.1=6 min	8:04 AM	8:06 AM
10-15 min	0.2=12 min	8:11 AM	8:12 AM
16-21 min	0.3=18 min	8:23 AM	8:24 AM
22-27 min	0.4=24 min	8:26 AM	8:24 AM
28-33 min	0.5=30 min	8:35 AM	8:36 AM
34-39 min	0.6=36 min	8:39 AM	8:36 AM
40-45 min	0.7=42 min	8:46 AM	8:48 AM
46-51 min	0.8=48 min	8:54 AM	8:54 AM
51-57 min	0.9=54 min	8:55 AM	8:54 AM
58-60 min	0.1=the next		

Modification of Leave after Approval

Steven Knox, a non-exempt employee, submits 8 hours of annual leave for Monday. Throughout the course of the week he ends up working extra hours and no longer wants to use all 8 hours of Annual leave. Rather than cancel the request and require the employee to submit a new one, which must be approved before the Payroll deadline, the manager may modify the leave.



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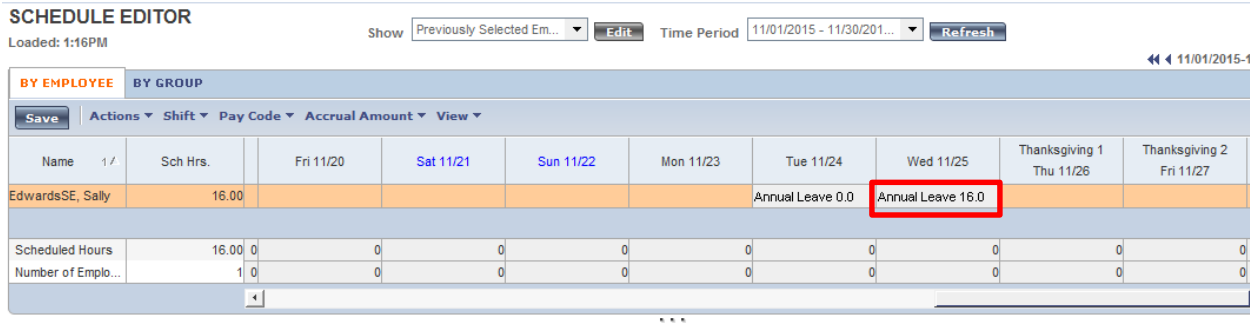
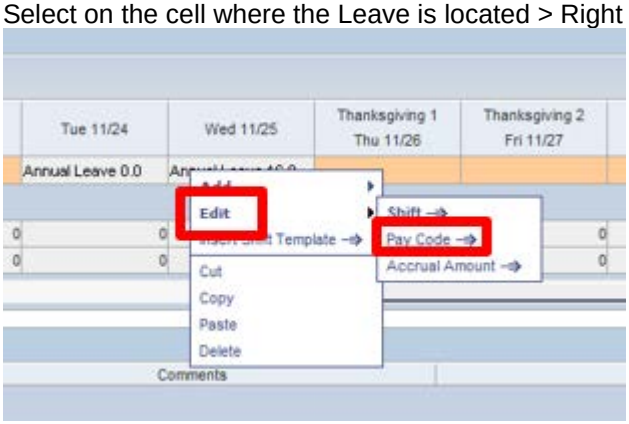
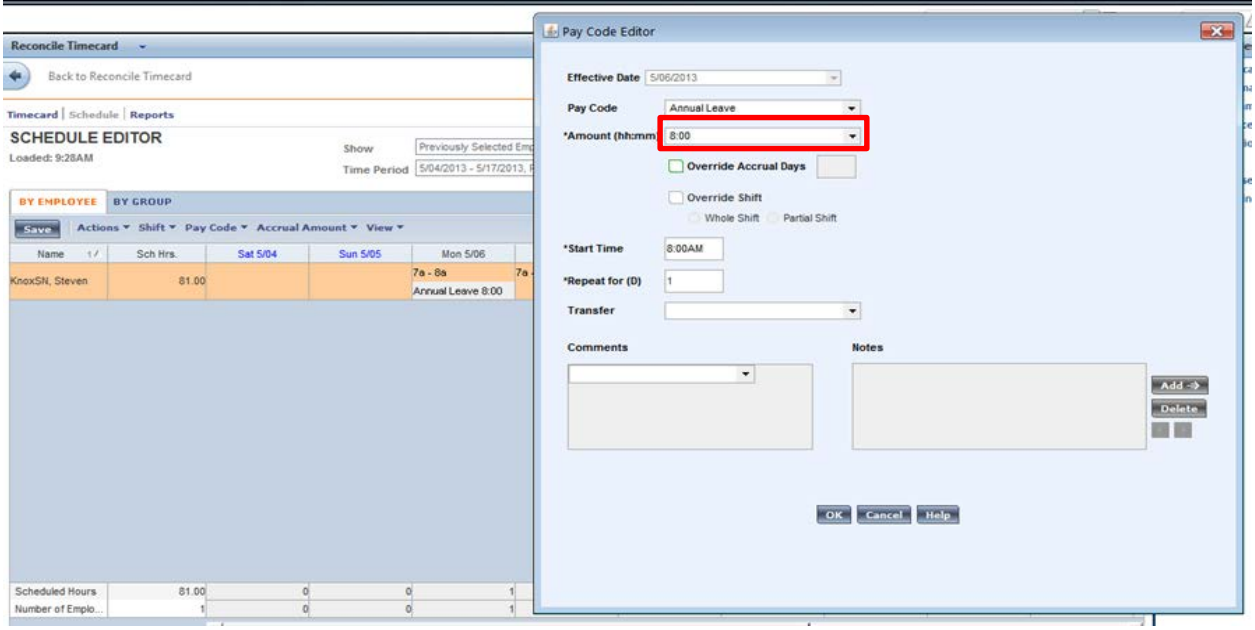
Navigate to the SCHEDULE EDITOR and locate the day that contains leave.



Select on the cell where the Leave is located > Right Select > Select “Edit” > Select “Pay Code”



Update the hours to the correct amount in the “Amount” field.



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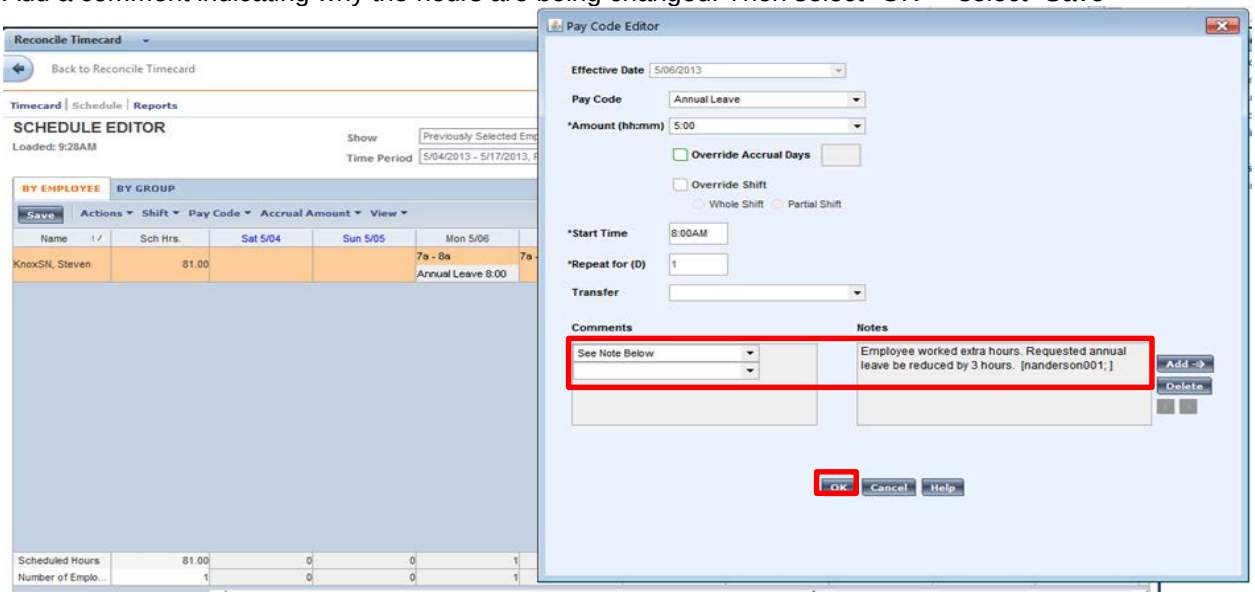
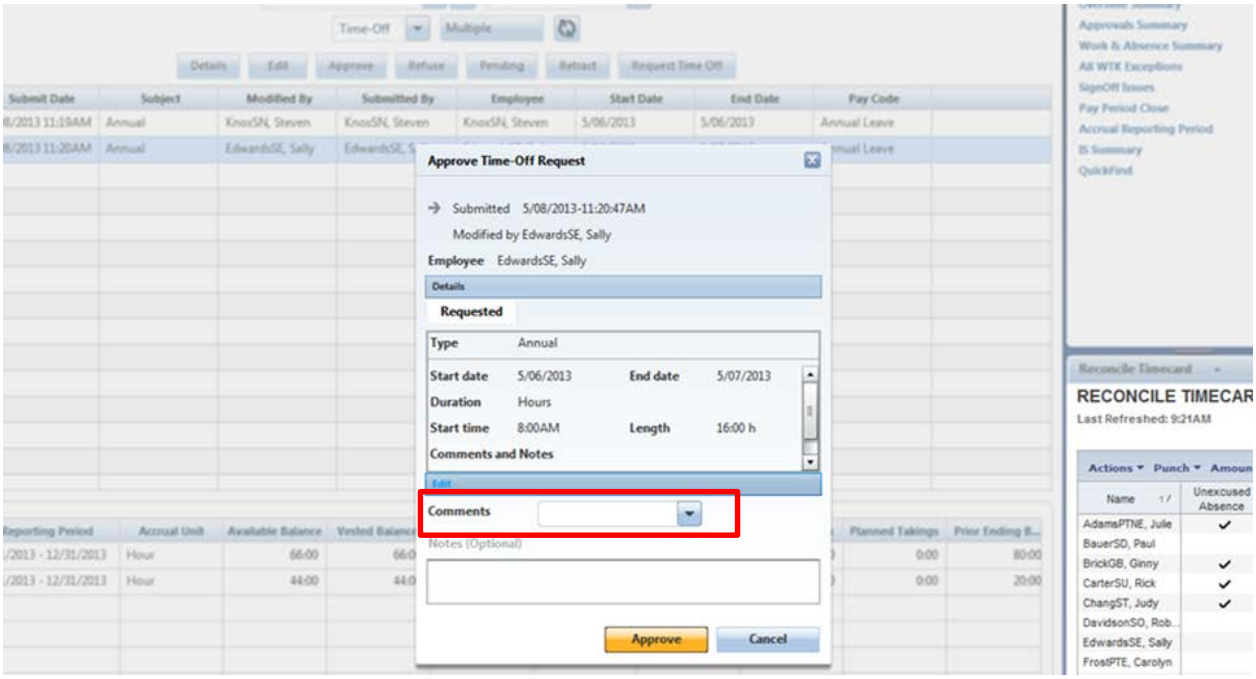
Add a comment indicating why the hours are being changed. Then select “OK” > select “Save”



Notice the timecard will now reflect the updated amount of leave and leave banks will be recalculated.

Modification of Leave Upon Approval

Sally Edwards submitted a leave request for two days. She indicated the total leave to be taken of 16 hours in the “length” column instead of 8 hours each day. Managers may update leave requests upon approval. Select on the “approve button.” This will open the approve time-off request window. Select on “edit” located above the comments.



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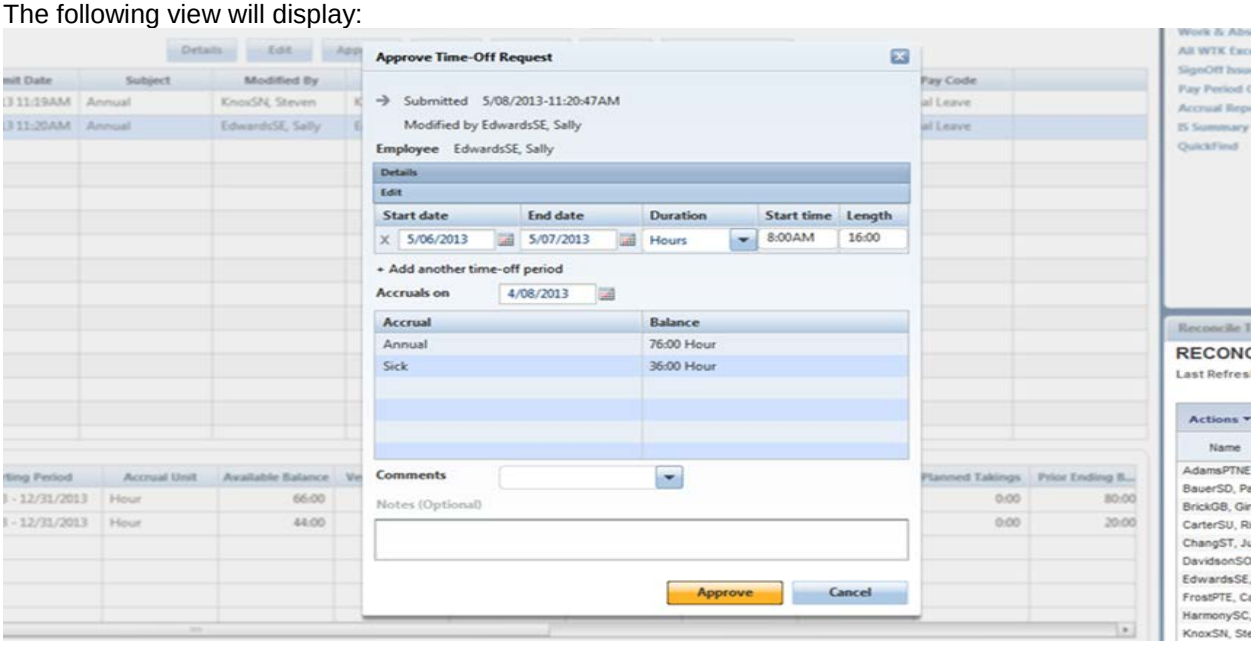
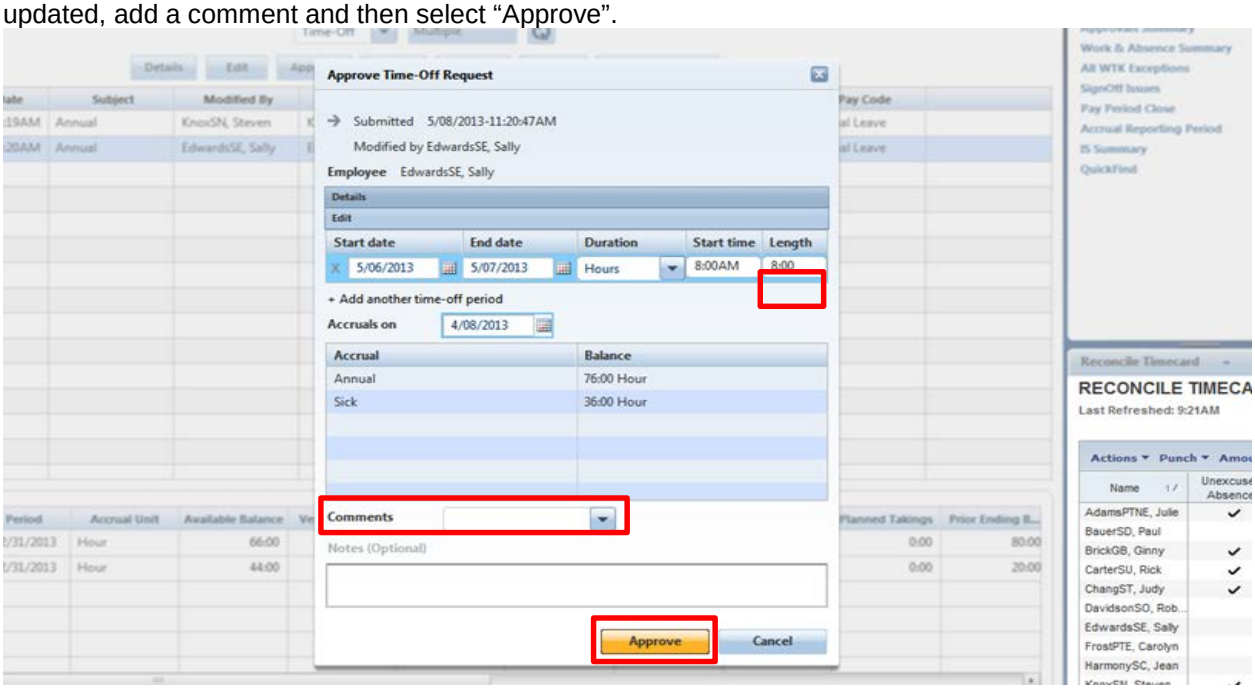
The following view will display:



The length of time and any other necessary fields may be modified. Once all appropriate fields have been updated, add a comment and then select “Approve”.



Ending Schedules/Breaks between Schedules

Patterns may need to be ended or have a break between the old one and the new one. Patterns are built in pay periods and once the pay period has been signed off on the pattern cannot be deleted. Instead the pattern will need to be ended to allow for changes.
Go to the schedule editor and select the individual whose pattern needs to be updated. Select on “shift” and “edit pattern.” The pattern editor will pop up.

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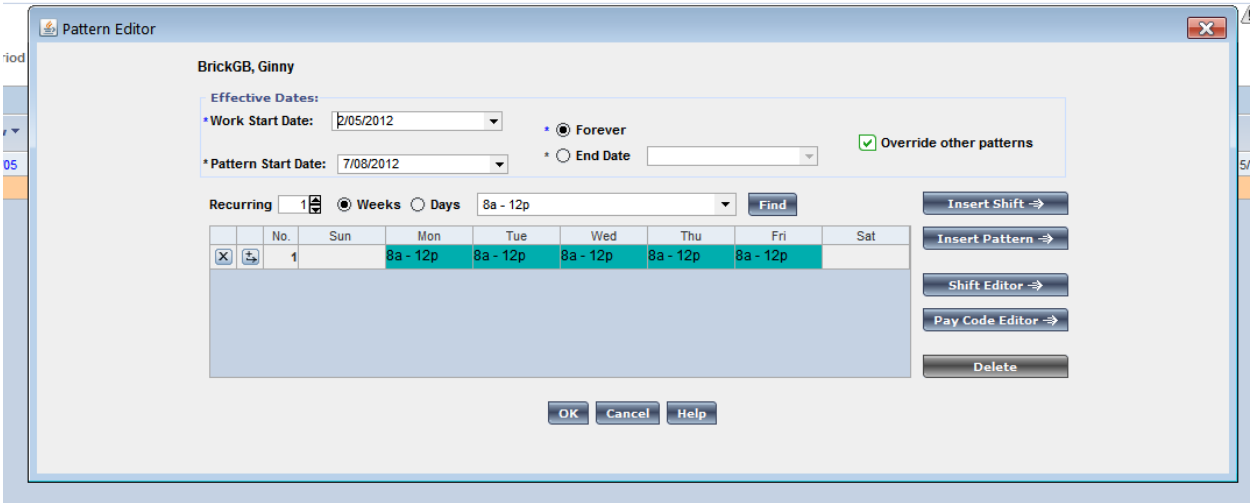
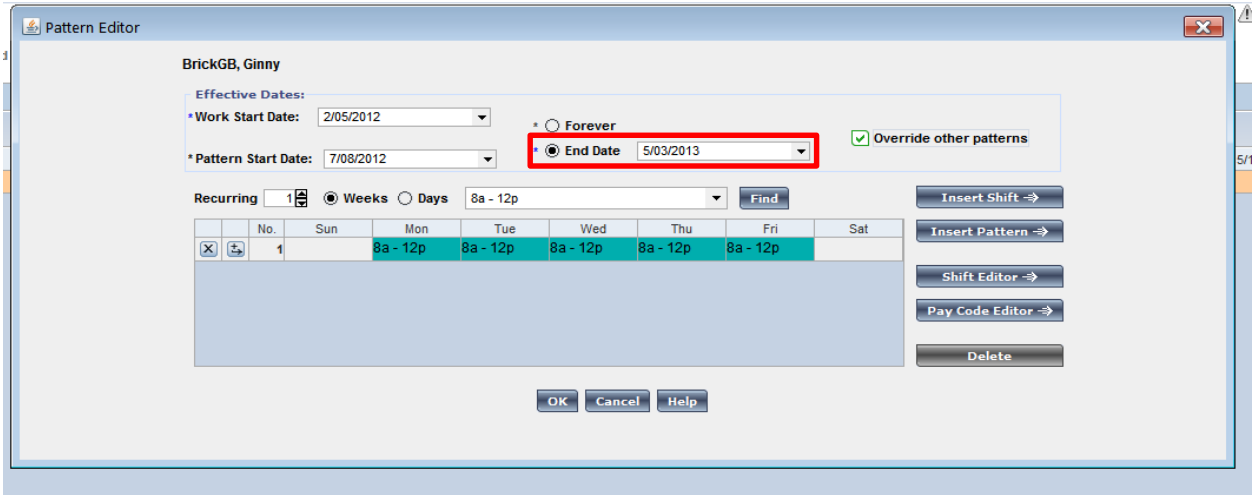
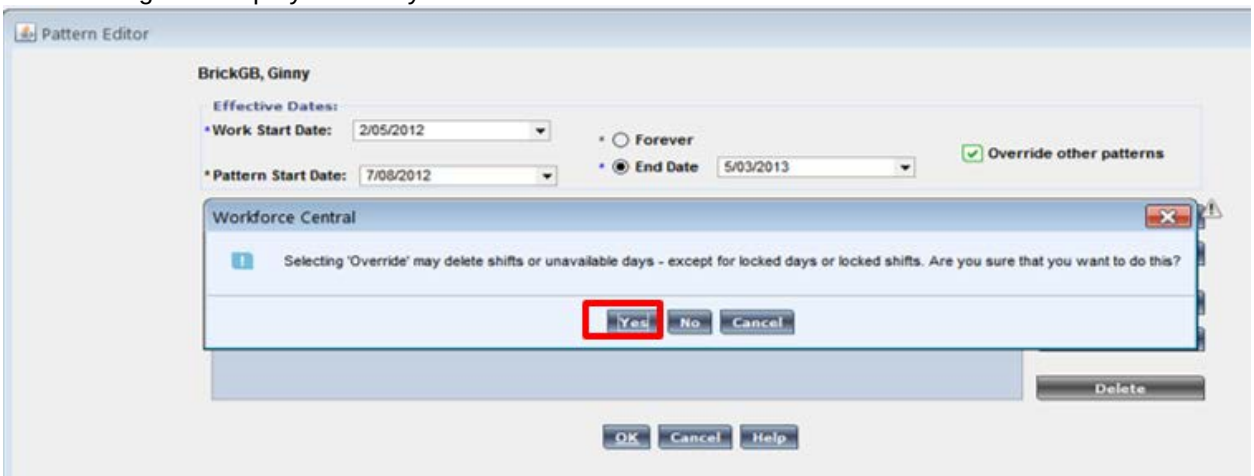


Change the radio button from forever to “end date.” Add the end date, which must be the last day of the last pay period signed-off or later.



Two warnings will display. Select “yes” for both of them.



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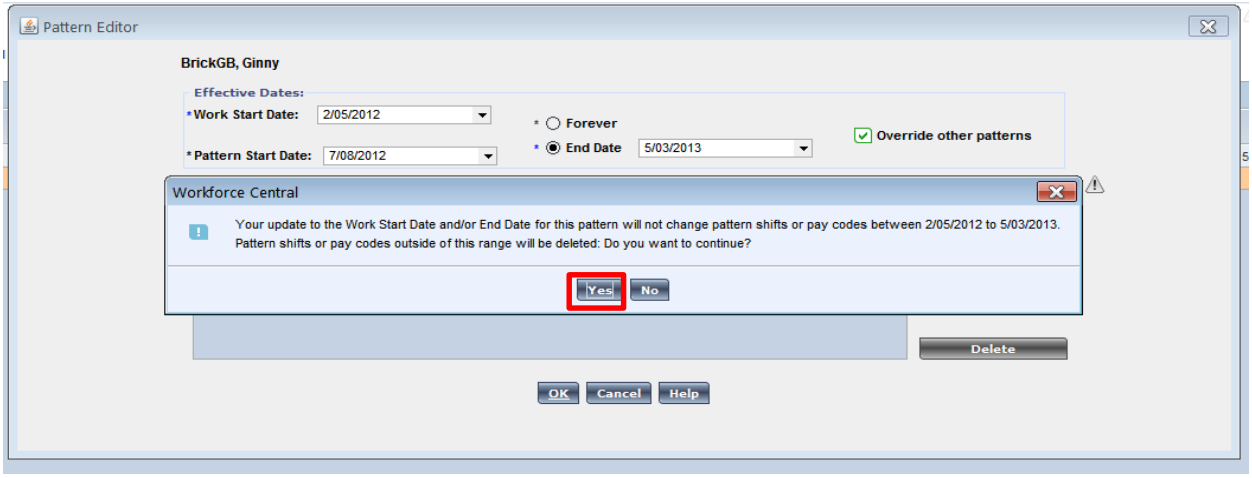
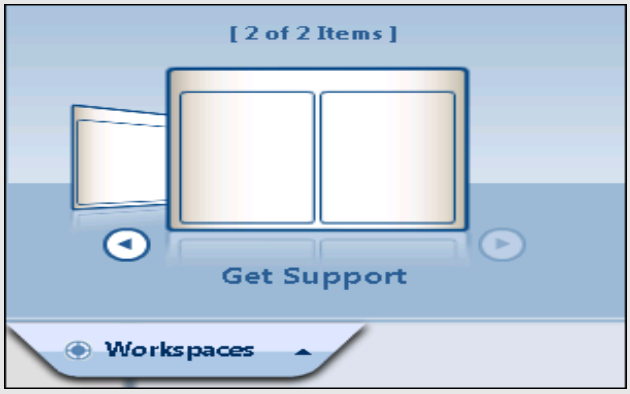


Save your changes in the SCHEDULE EDITOR. A new pattern may now be created going forward. Please see “Scheduling Employee’s” for instructions.

Using Online Help

Purpose

LoboTime contains an online Help system to help you perform Navigator or timekeeping tasks. It contains contents and search capabilities.

Steps		
1	Access the **Get Support** workspace.	

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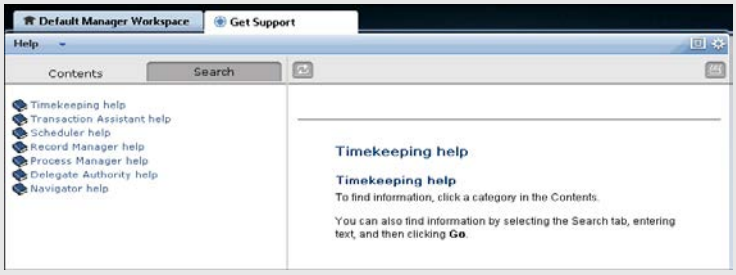
2	Use the tabs to locate online help data.	

Component	Description
Contents	Collection of topics
Search	Tool for entering a specific word or phrase; topics appear with percent rankings that identify their relevance

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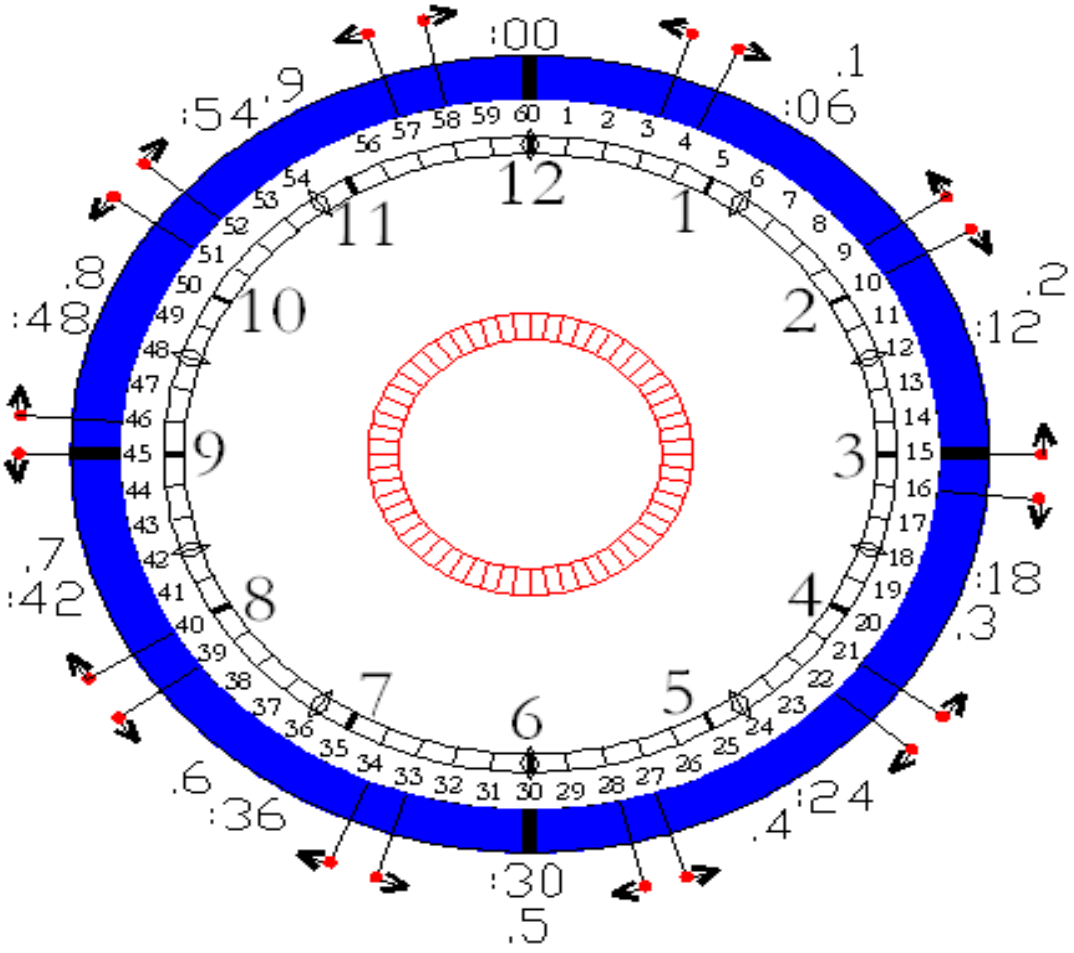
Rounding to the Nearest 10th of an Hour



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