TimeTraq Training for Department Administrators

Presentation by

Texas A&M AgriLife Payroll

What Is TimeTraq?

- TimeTraq is a web-based timesheet entry application that allows departments to have timesheets entered and approved online.
- TimeTraq automatically pulls in leave and holiday hours (for budgeted employees), as well as calculating overtime.
- TimeTraq’s timesheets are sent to BPP for final processing and payment.

Accessing TimeTraq

- TimeTraq is accessed through the TAMUS’ Single Sign On application (SSO)
  - https://sso.tamus.edu
- LeaveTraq & HR Connect users will already have a login for SSO
- When your department is given access to TimeTraq, a link to the program will automatically appear on your SSO menu
Getting Started with TimeTraq

- TimeTraq is a system-wide application that is available to all departments in TAMU in all system components.
- Before a system component can begin using the program:
  - The people who will hold TimeTraq’s “central” roles must be identified and given security clearance.
  - This is done by requesting access to TimeTraq here: http://www.tamus.edu/offices/bpp/access.html
- The central roles are:
  - Central administrators – Vic Seidel / Joe Corn
  - Payroll approvers – Rachel Blakesley (X), Anita McCoy (A)

Training Format

- The training for administrators is broken into two sections, which will be discussed in this order:
  - The Initial Setup
  - The Ongoing Process

First Steps

- Understand TimeTraq’s administrative / approval roles and how you want to divide responsibility between them:
  - Employee
    - A biweekly employee must complete a time sheet via TimeTraq
  - Manager
    - Each individual time sheet must be approved by a manager
  - Department administrator
    - Same basic capabilities/ responsibilities as central admin but at a departmental level
  - Department approver
    - Signs off on the department’s payroll
  - Payroll approver – (Anita and Rachel)
  - Signs off on the component’s payroll
  - Separation of duties
Behind the Scenes Processing

- TimeTraq’s behind-the-scenes processes do the work of creating adlocs, jobs and timesheets
- Understanding when these processes run and what they do is essential to getting the initial setup for an adloc done correctly
- Two types of processes: weekly and daily

Behind the Scenes Processing, cont.

- The weekly process is the more important one relating to new adloc activation. It does the following every Tuesday and Thursday:
  - Scans BPP for new adlocs and creates them in TimeTraq
  - Does a complete scan of the BPP budget looking for new positions and changes to existing positions
  - Creates/updates TimeTraq jobs as needed
  - Creates timesheets for active adlocs whose activation date has been reached
  - Sends weekly notifications to managers regarding submitted timesheets

Behind the Scenes Processing, cont..

- The daily process does two things:
  - Scans the BPP budget looking for UPDATES to TimeTraq jobs and pulling the changes into TimeTraq
    - E.g., new employee in PIN, rate of pay change
  - Sends daily email notifications to managers & delegates regarding timesheets in need of approval
Activating Adlocs Summary

- TimeTraq jobs are created from the BPP budget on the first Tuesday evening after the adloc’s status is set to active
  - 1/24 in our example
- TimeTraq timesheets are created for these jobs on the first Tuesday or Thursday that is:
  - on or after the adloc’s activation date
  - within 2 days of the start of a pay period
  - 1/26 in our example

Activating Adlocs Summary, cont.

- It’s very important to understand the BPP and TimeTraq schedules
- After an adloc is activated in TimeTraq and the Tuesday/Thursday process is run, employees will automatically see TimeTraq on their SSO menu.
  - Departmental admins/approvers will see it when they are granted their TimeTraq role
  - Managers will see it when they’re made a manager of a TimeTraq job or a delegate for a manager

Getting Started

- Log in to SSO and select the TimeTraq link
- TimeTraq will display the Adloc Selection screen on startup
  - Choose the workstation you want to work with
    - Most admires only work with 1 workstation – if that’s true for you this field will be read-only
- Initial setup:
  - Adlocs
  - Holiday schedules
  - Work schedules
Holiday Schedules

- In TimeTraq, budgeted employees are given a holiday schedule, whereas wage employees are not.
- Holiday schedules can be defined at the component level, so that all adlocs can use them, or for a specific adloc.
- ONLY the central admin role can define holiday schedules.

Holiday Schedules, cont.

- A holiday schedule is a descriptive name, such as “component??? Holidays”, and a series of specific holiday dates and descriptions.
- A holiday’s duration is defined in terms of hours to be paid and can be set up as a half-day, as in the case of Good Friday, et al.
- Component-level holiday schedules must be created before the departments begin their job setup work.
Work Schedules

- In TimeTraq, budgeted employees are always given a work schedule, whereas wage employees usually are not.
  - Note that wage employees CAN have a work schedule, if this is useful to a department.
- Work schedules can be defined at the component level, so that all adlocs can use them, or for a specific adloc.
- The central admin role can define holiday schedules at both levels, whereas the department admin can only define department-specific schedules.

Work Schedules, cont.

- A work schedule is a descriptive name, such as “component-?? Standard Schedule”, a schedule type (weekly or bi-weekly), and the defined work hours.
  - Work hours are defined in terms of time in, break duration, and time out.
  - Each of these can be adjusted on a day-by-day basis.

Demo

- Work Schedule Maintenance
- Work Schedule Days
Department Admins’ Responsibilities during Initial Setup

- Create adloc-specific work schedules, if required
- Job setup
  - Job settings
  - Assigning approvers
  - Delegate setup

Adloc-specific Work Schedules

- Adloc-specific work schedules are created using the process discussed earlier
- These schedules are unique to a department or even to a specific employee
- Work schedules should be created ASAP so that they are ready when it’s time to configure the jobs that will use them

Job Settings

- Jobs are created in TimeTraq in a default configuration that should be updated to fit the employees’ needs
- Important job settings:
  - Holiday schedule, if budgeted
  - Work schedule, if budgeted/needed
  - Timesheet entry form
    - Simple – the normal case
    - Projects
Job Settings, cont.

- Important job settings, continued:
  - Account method
  - BPP Budget – normal case
  - Projects – outside the scope of this training
  - Management hierarchy
    - LeaveTraq – default for budgeted
    - TimeTraq – wage
  - Comp. time rule
  - Can employee control comp. time disposition?
  - Subject to adhoc-level rule
  - Enforce % effort rule
  - Maximum hours

To update an employee’s job settings, click the Employees tab and locate the employee in the list.
- Click his/her job title to bring up the Job Overview screen.
- Click the blue Edit button at the top of the page to access the job setting in edit mode.
- Make changes and click the green Save button.

Demo

- Employees screen
- Job Overview screen
- Job Update screen
Assigning Managers

- As discussed, Managers may be set up in LeaveTraq or in TimeTraq
- If set up in TimeTraq, the Job Managers screen is used
- Approvers are assigned by searching for the manager’s last name or simply entering his/her PIN and clicking the green Add Manager button

Assigning Managers, cont.

- The Sequence Number determines the order of the Manager routing path
- Click the blue Up or Down buttons to rearrange the order of the Manager routing path
- Managers can be removed by clicking the red Delete button

Demo

- Job Approvals screen
Delegate Setup

- TimeTraq and LeaveTraq share the same delegates; therefore, a manager in LeaveTraq may not require any additional delegates to take on his/her role as a TimeTraq manager.
- Delegates added to a manager’s setup for TimeTraq purposes are also added to LeaveTraq.
  - This is true of LeaveTraq as well; therefore, care should be given when adding delegates.

Delegate Setup, cont.

- To add delegates to a TimeTraq manager, click the Managers tab, locate the manager for whom a delegate is to be added, and click the blue Delegates button.
- Delegates are assigned by searching for the delegate’s last name or simply entering his/her UIN and clicking the green Add Delegate button.

Delegate Setup, cont..

- Delegates can also be deactivated from this screen by clicking the red Deactivate button.
- Inactive delegates can be viewed by changing the View filter to Inactive.
- Inactive delegates can be reactivated by clicking the blue Reactivate button.
**Demo**

- Managers screen
- Delegates screen

**Initial Setup Summary, cont**

- New department
  - Determine department admins and approvers; grant these roles in SSO
  - Activate the adloc(s) in TimeTraq
  - Create adloc-specific holiday schedules
  - Create adloc-specific work schedules
    - At this point, the department admin can take over
  - Configure employees’ jobs
  - Configure approving managers
  - Add any required delegates

**The Ongoing Process**

- Once a department is up and running, the central and department admins continue to work together to manage the payroll process
- The department admin has primary “hands-on” responsibility on a day-to-day basis, whereas the central admin normally acts in more of a supervisory role
Ongoing Department Admin Responsibilities

- Ensure timesheets are being submitted/approved in a timely fashion
  - Dept. admins may need to edit/submit timesheets, in some cases
- Review timesheets being submitted for general accuracy, particularly in regards to leave, holidays, and OT
- Cancel unneeded timesheets (termination, etc.)
- Manage job setup for new employees and changes to existing employees’ jobs & approval hierarchy
- Manage delegates for managers as needed
- Create additional adloc-specific work schedules as needed
- Support employees and managers use of TimeTraq

Managing the Payroll Process

- The main tool admins use to manage the process is the Pay Period Review screen
- Click the RP Review tab to access Report Period Review screen. From here you can:
  - Review the timesheets for a particular adloc in a given pay period
  - Review individual timesheets
  - Find "problem" timesheets
  - Cancel adjustments if they are only for late Leave transactions.
  - Find a timesheet for a particular employee
  - Find employees who are missing a timesheet & create it for them

BPP Integration

- TimeTraq’s Adlocs, Pay Periods, and Jobs all come from BPP
- Hours entered into timesheets are allocated to accounts according the BPP budget
- The hours allocated to accounts are fed into the BPP database
**LeaveTraq Integration**

- For TimeTraq users, leave requests are validated against the user’s work schedule.
- Requests for multiple days are automatically broken into daily amounts for use within TimeTraq.
- Leave hours automatically appear in timesheets after the request is submitted.
- Leave is considered in when TimeTraq performs the timesheet’s state OT calculation.
- Comp. time banked in TimeTraq automatically updates LeaveTraq.

**LeaveTraq Integration, cont.**

- Leave documents must be processed before timesheets to which they are related.
  - Employee submission
  - Manager approval
  - Department-level approval
- Delegates are shared between TimeTraq and LeaveTraq.
- TimeTraq can use LeaveTraq’s management approval hierarchy for budgeted employees.

**Canopy Integration**

- New hires cannot access TimeTraq until their EPA is processed and approved.
  - This also applies to existing employees who transfer to a new position.
- Other EPA actions that impact TimeTraq:
  - Account changes
  - Make sure all EPA’s changing source of funds are reflected on the time sheet.
  - The RECALC button will pull in the most current data from BPP.
  - Rate of pay changes
  - Termination.
Demo

- Pay Period Review screen

Timesheets

- Note to trainers: load and show the TimeTraq Training Manager/Admin Timesheet Mgmt presentation at this point

Other Administration Tools

- Adloc Selection
- Employees View
- Managers View
- Timesheets View
- Job Activation
- Reports
- Help
Adloc Selection
- The Adloc Selection screen allows you to select a workstation and adloc for operations with other screens.
- The set of workstations and adlocs you can choose from is limited by the TimeTraq roles you have defined in SSO.

Employees View
- The Employees Screen allows you to see a list of all of your employees.
- Clicking the gray Timesheets button will display a list of the selected employee’s timesheets.
- Clicking the employee’s job title will display the employee’s job overview.
- This screen also allows you to view the employees of other managers for whom you are a delegate.

Demo
- Adloc Selection
- Employees Screen
Managers View

- The Managers Screen allows you to see a list of managers in an adloc
- Clicking the gray Employees button will display the Employees screen discussed earlier
- Clicking the blue Delegates button will display the selected manager's Delegates, as described earlier

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Demo

- Managers Screen

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Timesheets View

- The Employee's Timesheets screen allows you to view a list of timesheets for a specified employee
- To see older timesheets or timesheets for an inactive job, change the search criteria accordingly
- Clicking the gray “>” button will take you to the Timesheet Review screen
The Job Activation screen allows administrators to create a job in TimeTraq for an approved position in BPP. This is generally required only when a new employee is added and the EPA is not processed in time for TimeTraq to create the job automatically. The EPA creating the position must be completely approved before this function be performed successfully. To create a job, simply enter the employee’s UIN and PIN, then select the fiscal year in which this is to take effect and click the blue Activate Job button.
Reports

- TimeTraq’s reports are delivered in PDF format to your computer; therefore, Adobe Acrobat Reader is required to view them.
- To run a report, choose it from the list and fill in the selected report’s additional criteria.
  - Note that dates should be entered in “mm/dd/yyyy” format.

Reports, cont.

- Commonly run reports:
  - Adloc Payroll Detail, by name or account.
  - Lists the hours worked by employees in an adloc and the account(s) the time will be charged to.
  - Adloc Payroll Detail, by name or account, from P2Pay.
  - Lists the hours/amounts in BPP’s P2Pay database for an adloc.
  - Overtime Payments.
  - Lists overtime charges for an adloc.
  - Timesheet Adjustments.
  - Lists adjustments made to timesheets in a given pay period.

Reports, cont.

- Commonly run reports, cont.:
  - Approval Exceptions.
    - Lists timesheets entered/submitted by manager/administrators.
  - Employees w/o Managers.
    - Lists employees whose job does not have an approver in TimeTraq.
Help

- TimeTraq’s help system can be accessed from any screen by clicking the “?” on any TimeTraq screen
- You can navigate through help by:
  - Following relevant links from the help home page
  - Accessing the table of contents
  - Searching

Demo

- Help
Security

- Do not share your SSO password with anyone.
- TimeTraq will automatically log you out after 17 minutes of inactivity.
- You can manually log out of SSO by clicking the SSO Logout button on any TimeTraq screen or by closing your browser window.
- Always close your browser window(s) after using any confidential web site like TimeTraq.

Questions and Answers