TimeTraq Training for Department Administrators

Presentation by

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Payroll

What Is TimeTraq?

- TimeTraq is a web-based timesheet entry application that allows departments to have timesheets entered and approved on-line
- 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 admins 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 admins only work with 1 workstation – if that's true for you this field will be read-only
- Initial setup:
  - Adlocs
  - Holiday schedules
  - Work schedules

Demo

- Adloc Maintenance
- Adloc Overview
- Adloc Add/Update

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 adloc-level rule
  - Enforce % effort rule
  - Maximum hours

Job Settings, cont..

- 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

Demo

- Managers Screen

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

Demo

- Timesheets Screen

Job Activation

- 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

Demo

- Job Activation Screen

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 aldoc
  - 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

Demo

- Reports Screen

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 <u>anyone</u>
- 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