UKG Dimensions User's Guide

For

BALL STATE UNIVERSITY

Supervisors and Timekeepers

June 2023

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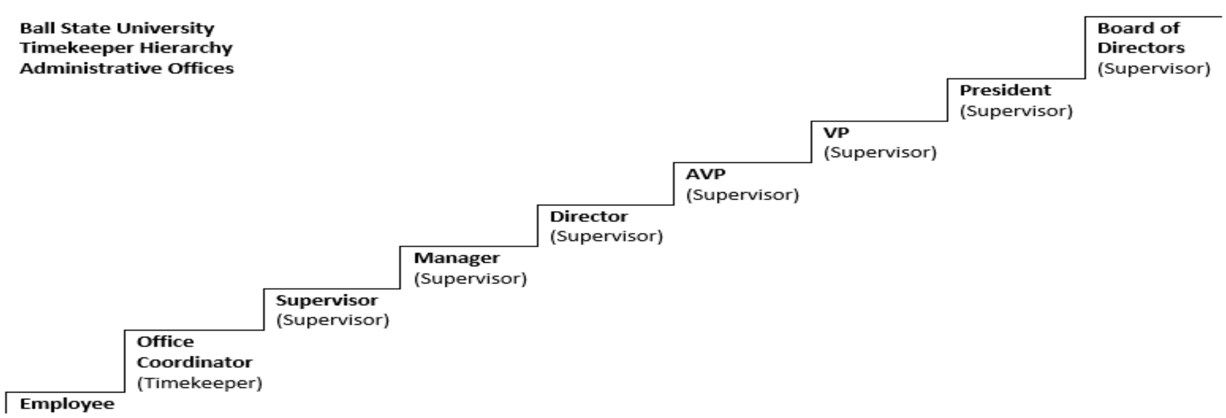
Introduction

Timekeeping is a critical function, which may be performed by the individual employee, a timekeeper, a supervisor, or a combination of these individuals. The timekeeping function requires accurate and timely recording of time and attendance. Timekeeping must be done in accordance with federal and state guidelines as well as University policies. Specifically, Indiana Code IC 35-44-2 “Perjury, False Reporting, Impersonation, and Ghost Employment” makes it a criminal and civil law offence to employ and pay an employee when the employee is not performing duties related to the operation of the employer thus emphasizing the critical role of the timekeeping function.

Timekeeping System

Ball State University’s official timekeeping system is UKG Dimensions. UKG is used to report hours worked and time off. Every pay period, an employee’s timecard should be reviewed for accuracy, edited as necessary, and approved by an employee’s supervisor before sending to payroll for processing.

By giving every supervisor UKG access, a hierarchy structure is created thus providing a “back up” supervisor or next level approver to assist with coverage for vacations or illness. See example below:



Timekeeping Roles

<u>Employee Role</u> – Each employee is given access to their timecard to view, make limited edits (add a pay code, add a comment, etc.) and approve it.

Auditor, Timekeeper, and Supervisor Role's require a manager's license in UKG Dimensions. This will ensure that the employees who are placed in one of these roles understand the importance of accurate timecards, the review process, timely approvals, as well as following all federal/state guideline and organizational policies.

<u>Auditor Role</u> - View only access given to an employee (or non-employee like State Board of Accounts) to be able to view all timecards of the Ball State employees as part of their job responsibilities.

- Examples include Benefit Manager for PPACA tracking, Human Resources for hours/shift/job information, Employee Relations for discrepancies/complaints/grievances, and internal/external auditors.

<u>Timekeeper Role</u> – View and Edit access given to a non-managerial employee who is assigned the timekeeping functions for other employees in their department. A timekeeper is not required in every department; however, some larger departments may opt to enlist the help of a timekeeper. This role does not have the final approval authorization.

- Examples include an Admin Coordinator, Office Coordinator, Specialist, Assistants, etc.

<u>Supervisor Role</u> - View, Edit, and Approve access given to a supervisor who is assigned the timekeeping functions and/or final approval authorization for employees that they supervise in their department and/or organization. A supervisor is responsible for the accuracy of their employee's timecards as well as ensuring the timecard approvals are complete by the assigned deadlines. The approval does not lock the timecard only the sign off does.

- Examples include Supervisors, Managers, Deans, Chairs, AVPs, VPs, etc.

Timekeeping Responsibilities

Employee Responsibilities:

- Non-exempt employees are required to:
  - Record time via punch or time clock
  - Report time off
  - Record time worked against the proper job, contract, or grant fund
  - Review and approve their timecard by the approval deadline.

- Exempt employees are required to:
  - Record exceptions (sick, vacation, or leaves)
  - Review and approve their timecard by the approval deadline.

Timekeeper Responsibilities:

- Review timecards to ensure the employee's time is accurately recorded and complete
- Work with employees to resolve errors like missing punches and job corrections
- For corrections after the payroll has processed: complete a Timecard Adjustment Form, obtain the employee and supervisor signature, and email the form to the Payroll department.

Supervisor Responsibilities:

- Review direct report timecards to ensure the time is accurate and complete
- Assist the Timekeepers with questions and work with employees to resolve errors like missing punches and job corrections
- Approve the timecard by the approval deadline thus notifying the Payroll department that you have completed your supervisor responsibilities.
- For corrections after the payroll has processed: complete and sign a Timecard Adjustment Form, obtain the employee signature, and email to the Payroll department

BALL STATE UNIVERSITY

Payroll Processing Information

Biweekly Payroll:

Ball State University pays all employees on a biweekly pay cycle.

- A pay week runs from Sunday 12:00 AM to Saturday 11:59PM.
- A pay period runs for two consecutive weeks starting on Sunday and ending on a Saturday.
- Employees will be paid every other Friday, the Friday after the pay period ends.

In order to ensure the payroll is completed in a timely manner, the following schedule has been established:

- The employee's Supervisor will need to approve their employee's timecards by 2:00 PM on Monday (unless a holiday schedule applies) after the pay period ends. (aka "Timekeeping Monday")
- Payroll recommends that the Supervisor set a biweekly reminder on their calendar.
- If the Supervisor fails to complete the approval by 2:00 PM, Payroll will apply the Sign Off for you. Payroll will then notify you and your supervisor of the failed approval. Please note that multiple failed approval notifications may result disciplinary action being taken.

As a Timekeeper or Supervisor, you have access to UKG at any time during the pay period to view or make changes/corrections. The more frequently the timecards are reviewed, the less time it will take on "Timekeeping Monday" before submitting the information to Payroll Operations. Therefore, reviewing the information on a daily basis is strongly recommended.

Log On Information & Instructions

Important Information:

UKG Dimensions utilizes single sign on (SSO) which allows you direct access without logging on if you are already logged onto the BSU network. UKG Dimensions Username and Password are the same as your BSU network account.

Log On Options:

BSU website/Payroll webpage

UKG Dimensions

BSU website/My.BSU under "Additional Tools"

https://my.bsu.edu/

Log On Instructions:

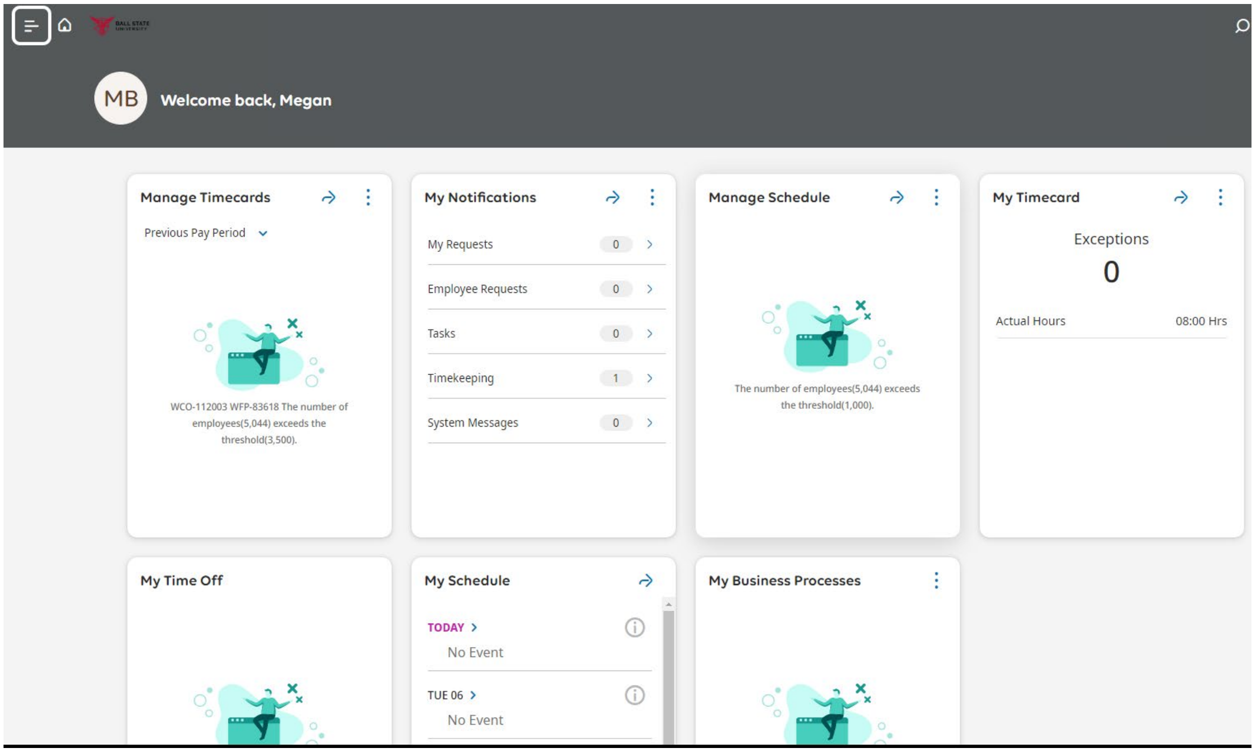
Log On Step 1 - Click on one of the links provided above under "Log On Options."

Log On Step 2 - If you are not already logged onto the BSU secure network, you will be taken to the "MY BSU LOGIN" screen and required to enter your BSU username and password.

- If you are already logged onto the BSU secure network, you will be given direct access into UKG Dimensions without being required to enter your BSU username and password. This log on feature is called "single sign on" or SSO; it will open UKG Dimensions automatically to your default home screen (see example below).

Please contact the payrollprocessors@bsu.edu if you need special accommodations for UKG Dimensions or assistance logging on.

Timekeeper or Supervisor Home Screen View



Key Areas of your Timekeeper or Supervisor Home Screen View:

Take action directly in a tile.

- Can submit a time-off request from the My Time Off tile.

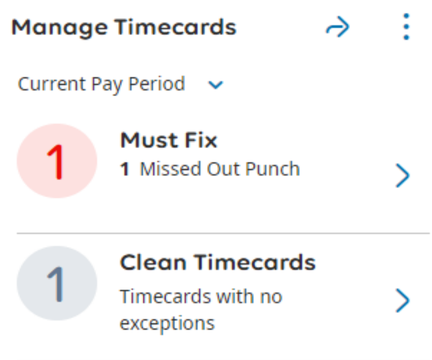
Use the Employee Search feature.

- For example, you may wish to use the tool to quickly search for and access the timecard of a specific employee.

Open the Main Menu to access other pages.

- For example, you can access timecards, dataviews, and reports through the Main Menu.

On your Manage Timecards tile will alert you to any missed punches that remain in employee timecards.



Click the error to view the employees whose timecards contain these discrepancies to display their timecards and reconcile the discrepancies.

You can always return to the home page from any other page by selecting the home page icon.

Switch to Timekeeper or Supervisor Roles

Switch to Timekeeper or Supervisor Roles from your default home screen:

Employees with more than one role can easily switch between roles to access relevant employees and tools.

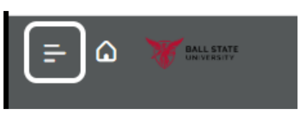
Navigation: Main Menu

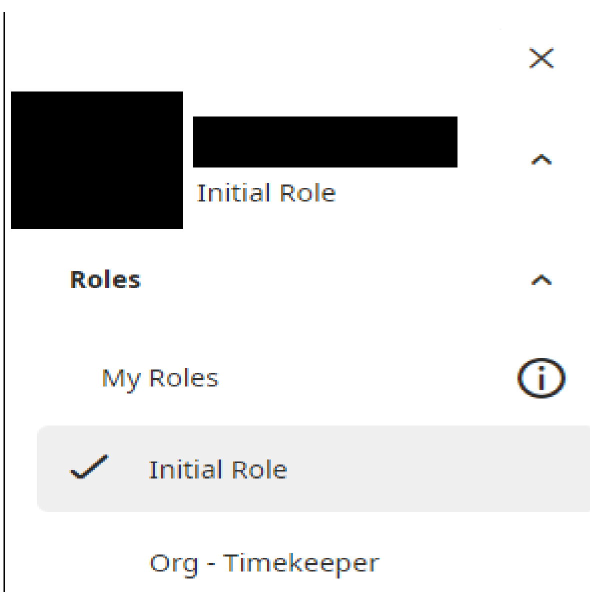
From the **Main Menu** panel, select **Employee Settings Menu**.

A list of assigned manager roles will appear.

From the **Switch Roles** list, select the relevant manager role.

Once the role is selected, the new home page displays, and the timekeeper or supervisor can start performing tasks based on the selected role.





Access Employee Timecards

Your employee timecards can be accessed multiple ways:

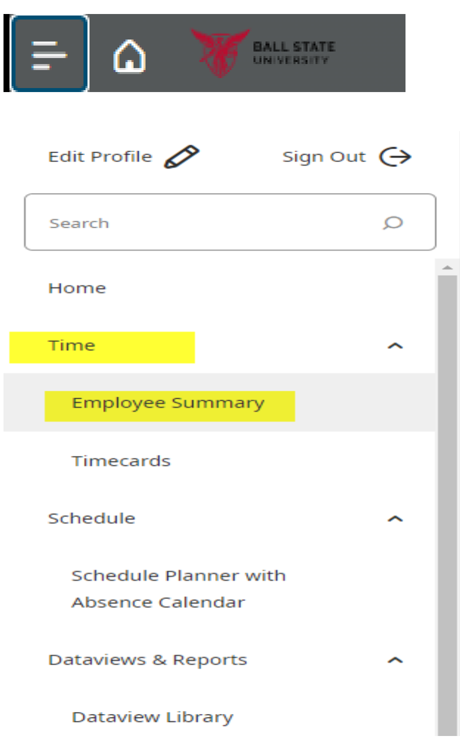
Manage Timecard Tile on the Home Page

Your home page will display with various tiles. Tiles can be used as a quick way to access various items such as your employee timecards, leave balances, and notifications.

Employee Summary under the Time category on the Main Menu

The Employee Summary page enables you to review the overall status of your employees' timecards. You can select one or more employee timecards and apply the same action to selected employees.

Navigation: Main Menu > Time > Employee Summary



Select the **Select Timeframe** drop-down list and select a timeframe.

Select the **Select Hyperfind** drop-down list and then select applicable criteria.

From the **Employee Full Name** column, select the checkbox next to one or more employee names.

From the menu bar, select **Open Selected**.

Review or apply actions to the selected timecards.

Timecards under the Time category on the Main Menu

Navigation: Main Menu > Time > Timecards

Select the **Select Timeframe** drop-down list and select a timeframe.

Select the **Select Hyperfind** drop-down list and then select applicable criteria.

(Optional) View a different employee timecard using one of the following methods.

- Select the down arrow next to the first employee's name to open the employee list. Scroll down to select a new employee.
- Select the **Next Employee** or **Previous Employee** arrows to view the next or previous employee timecard.

Add, Delete, or Edit Punches

Punches

Punches are entries in an hourly timecard that mark the beginning (in-punch) or end (out-punch) of a work interval, such as the beginning of a shift or transfer.

Add a Punch

Managers can add a missing punch to worked time, if needed.

Navigation: Main Menu > Time > Timecards

Select a cell under the **In** column to enter a start time for the employee's shift.

Select a cell under the **Out** column to enter an end time for the employee's shift.

Enter times in the standard time AM or PM format or the 24-hour format.

Select **Save**.

Manager edited punches appear with a black triangle in the upper right corner and are date and time stamped for audit purposes.

Delete a Punch

If a punch is added in error, managers can delete the punch.

Navigation: Main > Time > Timecards

Select the punch, and then press **Delete**.

Select **Save**. The punch is removed from the timecard.

Edit a Punch with Punch Actions
When you need to apply a transfer, override a punch, cancel deductions, or add a comment use the Punch Actions.

Navigation: Main Menu > Time > Timecards

Right-click a cell with a punch in the **In** or **Out** column.

The **Punch Actions** glance opens and displays the current information about the punch, such as date, time, override, time zone, exceptions, last edit date, and the person who edited it.

From the **Punch Actions** glance, select **Edit**.

From the **Punch** slider, enter the following information.

- Time (hh:mm) * — you cannot leave this field blank. Based on the time that you enter, the system uses the rounded time. For example, if you enter 8:02, the rounded time might be 8:00. The rounded time is used for totals calculations, but the actual time will be displayed on the timecard.
- Transfer — Select the arrow to open the Transfer slider and select the applicable transfer.
- Override — Select whether the time should be considered as an In-punch or an Out-punch by the solution.
- Time Zone — Select the applicable time zone. Use this if you have employees who work in different locations that have different time zones.
- Cancel Deductions — Select one of the listed deduction rules. This is used when the employee has an automatically deducted meal break and does not punch in/out for breaks. If the employee skips a meal, managers can cancel the deduction to pay the employee for the mealtime.
- Exceptions — if there is an exception triggered by the solution, the exception name is displayed. You cannot edit this.
- Comments — if there is a comment added to the time, the comment is displayed.

Select **Apply** and then select **Save**. The punch edit is recorded in the timecard with applicable indicators.

Request Time Off

All Time Off requests will be routed to the employee's supervisor for approval. The supervisor will receive an email notification and will see the request under **My Notifications** tile on their home page.

Request Time Off from your My Time Off tile

From the **My Time Off** tile

Select **Advanced Options**

Select **Apply**

Select dates from the calendar.

To select more than one day, select the days.

To remove days from the selection, deselect the selected days.

Select **Apply**

Select the **paycode** for the time off.

Under Hours per Day **Start hours*** (this is the time your request starts on the day you request off, ex. if you are scheduled to work 8:00 AM-5:00 PM and you're taking a half day vacation in the afternoon you would put 1:00 PM.)

Under **Duration** enter the **hh:mm*.**

Select **Review** to enter a comment, if you choose not to enter a comment select **Submit**.

Request Time Off from My Calendar

Main Menu > My Information > My Calendar

Select dates. Do one of the following:

Select **New Request > Time-off**.

Right-click the selected dates. Select **Time-off**.

Select the **Type** of Time Off.

Select **Apply**.

If you did not select dates in the calendar or to change the selected dates select Dates. Select days from the calendar. Select **Apply**.

To select more than one day, select the days.

To remove days from the selection, deselect the selected days.

To select more than one consecutive day, select and drag across the days in the calendar.

For time off requests, at Duration, select one of the following. You may not see all of these options because the available durations depend on the configuration of the request.

At Duration, select the paycode for the time off.

Submit the request now

Select **Submit** or to add a

Select **Review** to enter a comment, if you choose not to enter a comment select **Submit**.

Add a Pay Code to your Timecard to Request Time Off

From your timecard, click in the **Pay Code** column.

Click the drop down arrow to open a list of pay codes.

Select the pay code you wish to use then tab, moving your curser to the **Amount** column.

Enter the number of hours used into the **Amount** column.

Date	Pay Code	Amount
Sun 5/28		
Mon 5/29	Memorial ...	0:00
Tue 5/30	Vacation	8:00

Select **Save**.

Move Timecard Total Amounts

Move amounts in the timecard totals tab to make necessary changes that are reflected in the Audits tab.

Amounts that are moved or deleted are tracked in the Timecard Audits tab.

Move Total Amounts
Moving totals amounts enables you to easily override pay code totals to move from one total bucket to another for accurate payroll reporting. You can transfer time from one paycode to another, or transfer totals from one business structure location type to another.

Navigation: Main Menu > Time > Timecards

On an employee timecard, select the necessary time frame.

Select the **Totals** add-on and ensure the Totals grouping selection is set to All (no filters).

Right-click on the row from which you would like to move. The Totals Actions glance opens.

Select **Move Amount**. The Move Amount panel opens.

In the "To" area of the panel, enter the **Effective Date**, select a **Paycode**, and enter an **Amount**. If the employee has a **Multiple Assignment** and you need to change the location (or job), cost center, labor category, or work rule the time has been charged to, select a Transfer from the most recently used list, or select the arrow to open the Transfer panel.

(Optional) Add **Comments** and **Notes**.

Select **Apply**. A new row with the “To” information is added, unless there already is a paycode or transfer of the same value in the Totals add-on. The From row is reduced by the amount moved. Select **Save**.

Review Timecard Totals

Timecard Totals

You can review and interpret total hours worked in the timecard.

It is necessary to review your employee's timecard totals before you approve the timecard. To view an employee's totals in the timecard, you will need to activate the Totals add-on.

The Totals add-on contains all the hours the employee will get paid for in a particular period.

Review Timecard Totals

Totals must be reviewed before a timecard can be approved. This helps ensure correct and accurate payment can be processed in a timely manner.

Navigation: Main Menu > Time > Timecards

At the bottom of the timecard, select the **Totals** add-on.

Select the **Timeframe**.

Select how to view the totals.

You can view totals by Location and Job, Labor Category, Cost Center, and Pay Code.

Note The **Daily** and **Period to Date** time frames show totals based on the date you select in the timecard.

From the column menu, select a method to sort the totals.

For example, sort in ascending order.

If the employee was transferred during any shift in the selected timeframe, the totals display an (x) symbol indicating the transferred account totals separate from the others.

Approve Employee Timecards

Employee Timecard Approval
Employee timecards are approved at the end of the pay period for payroll processing.

Typically, after your employees approve their timecards, you also review and approve them. Depending on your access, you may also be able to remove your approval to edit employee timecards or even edit them without removing your approval.

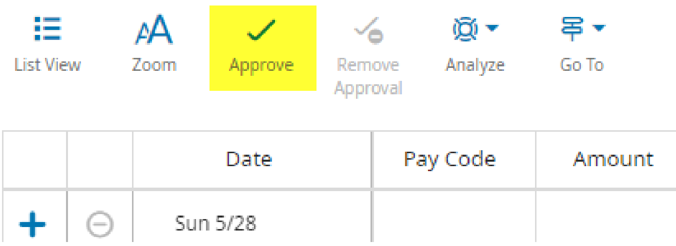
Before payroll processing begins, a sign off is applied to the timecard (by a Payroll Specialist). **Note:** You cannot remove the approval after the timecard is signed off.

Timecard Approval Status Visual Cues
The background color of the timecard changes depending on who has approved it.

Background Color	Description
	Approved by employee but not by manager.
	Approved by manager but not employee.
	Approved by both employee and manager.
	Timecard has been signed off.

Approve a Single Employee Timecard

You can use the system to approve a single timecard:



Navigation: Main Menu > Time > Employee Summary

Select employees and then select **Open Selected**.

Select the appropriate timeframe.

Ensure timecard accuracy including information on the **Totals** add-on.

Select **Approve**.

Approve Multiple Employee Timecards

You can approve multiple employee timecards at one time.

Navigation: Main Menu > Time > Timecards

Select the appropriate timeframe and search criteria that you wish to approve.

Select checkboxes next to employee names. To select all employees, check **Select All**.

If you have more than 40 employees, scroll down to the bottom to ensure that you selected all employees before submitting approval.

Select **Approve**.

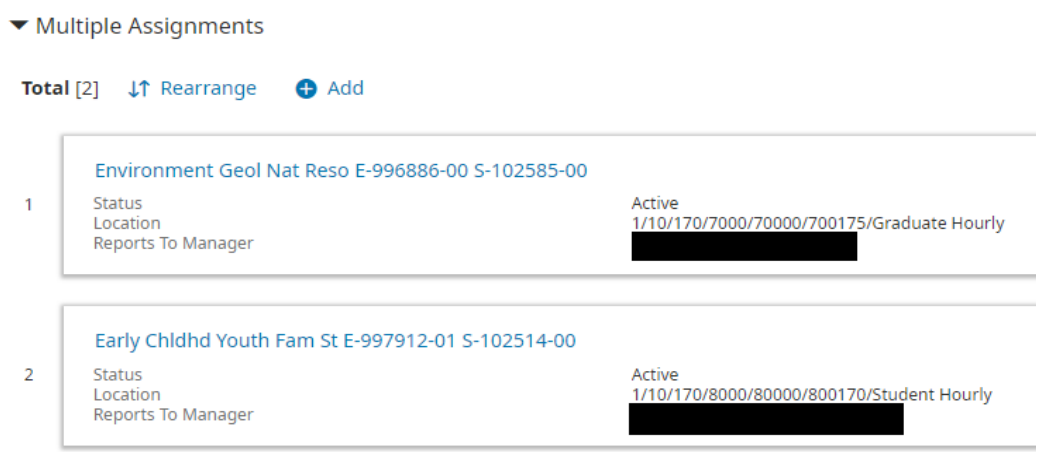
Select **Yes**.

Depending on your dataview, you may want to refresh your view to confirm your approval. Navigate to **Main Menu** and select **Dataviews & Reports** and then **Group Edit Results**. Expand, complete, and confirm your approval.

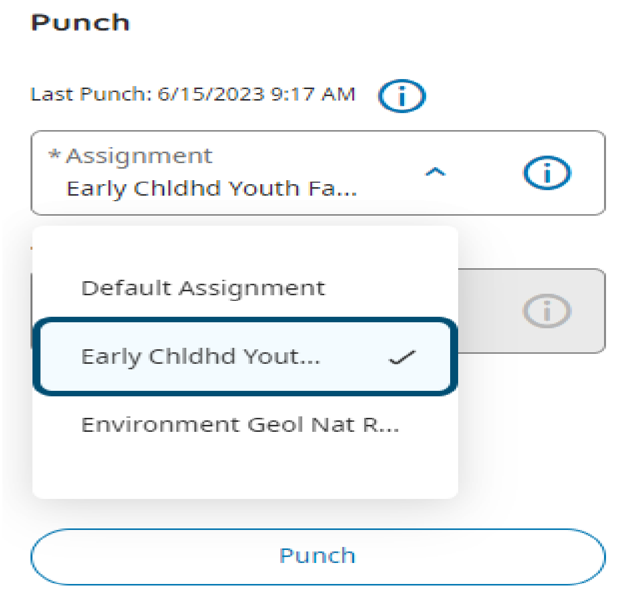
Multiple Supervisor Approvals on a Timecard

Multiple supervisors can **Approve** a Timecard if the employee is done working for the pay period.

Your employee may have more than one hourly paid position (multiple assignments); however, they will only have one Timecard.



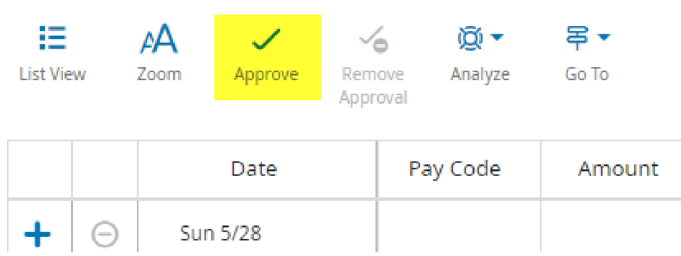
When using the Punch tile or Timeclock, your employee will be guided to complete the Job Transfer path to indicate the position they are capturing hours worked, and that information is added to their Timecard in the Transfer column.



If an employee manually enters time on their Timecard, the Job Transfer path may be missing. IF so, this needs to be added to the Timecard in order for the employee to be properly paid.

At the end of a pay period, using the **Totals** link at the bottom of their timecard, you can review the total hours worked the position you are responsible for approving.

To Approve the Employee Timecard Select **Approve**.



The record of each **Approve** at the end of the pay period is captured and stored in the **Audit** trail on the Timecard for the employee.

Working with Dataviews

Sort and Personalize Dataviews

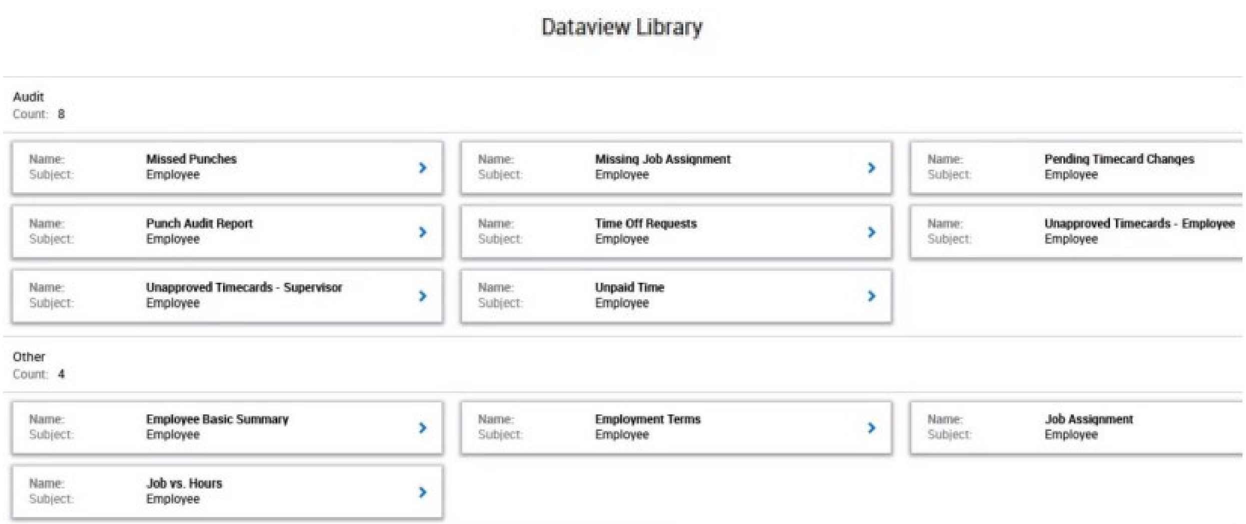
Dataviews give you deeper insight into the performance of your direct reports.

Some useful Dataviews include:

- Missed Punches
- Pending Timecard Changes
- Unapproved Timecards

Within a Dataview you can sort & filter data

Like other views, select the specific time period to view (usually Current or Previous pay period.)

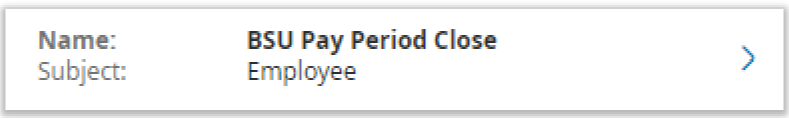


BSU Pay Period Close Dataview

At the end of a pay period, you must ensure that all the time information is accurate and complete. Timecards will not process when they contain missing or incomplete information. Even though you might have edited employee timecards on a daily basis, you need to perform a final check on employee timecards to ensure the employees are paid correctly for their worked and non-worked hours.

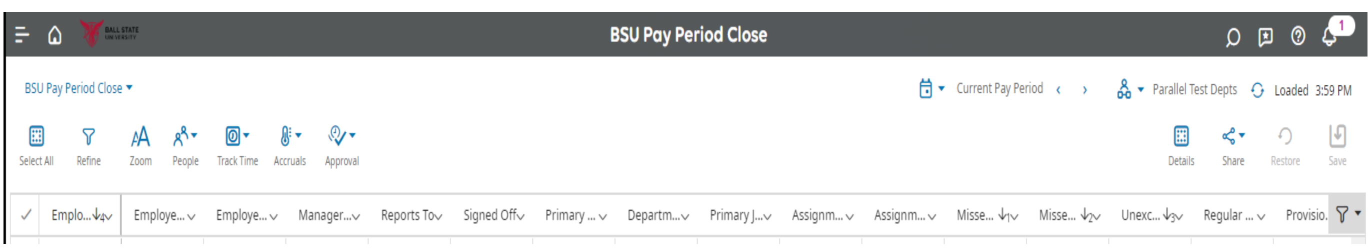
Under your Dataview View Library

Select BSU Pay Period Close



Once the pay period ends, you should review each employee's timecard for the following discrepancies:

- Punch issues
- Worked hour issues
- Non-worked hour issues
- Transfer issues
- Supervisor can apply mass approvals



Report Instructions

All information about an employee's time and labor account is stored in the Workforce Central database. Reports help you extract the information in views that provide you with meaningful data. Reports can provide data that helps you make timely business decisions, such as managing tardiness in your department or providing information to help you investigate an incorrect paycheck.

How to generate a report in UKG Dimensions:

Navigation: Main Menu > Dataviews & Reports > Report Library

From the **Report Library** page, select **Run Report**.

In the **Select Report** panel, select a category to display the list of reports.

Select a report. Then, choose **Select**.

In the **Timeframe** section:

Select the **Timeframe** icon.

Select a timeframe. Commonly used timeframes include:

- Previous, Current, or Next Pay Period
- Previous, Current, or Next Schedule Period
- Week to Date
- Last Week
- Yesterday
- Yesterday, Today Tomorrow
- Yesterday plus 6 Days
- Last 30 Days
- Last 90 Days
- Select Range

From the **Output Format** drop-down list, select **PDF**, **Excel**, or **Interactive**.

Select **Run Report**. The "In Progress. Report is Running." message appears.

From the **Report is Completed** window, select **Ok** to access the report.

Create a Hyperfind

Supervisors and Timekeepers can define personal hyperfinds as custom queries on the schedule. A Supervisor or Timekeeper cannot edit or preview a hyperfind created by another Supervisor or Timekeeper.

How to create a hyperfind in UKG Dimensions:

Navigation: Main Menu > Schedule > [Applicable Schedule Planner]

From the Locations & Hyperfinds drop-down list, select **New Hyperfind**.

On the **Hyperfind Editor** page, at the **Ad Hoc** field, select **No**.

Complete the **Add Description** field with a name for the hyperfind.

At the **Visibility** field, select **Personal**.

Select **Add Conditions**.

On the **Select Conditions** page, at the **Filter** panel, select the categories from which to choose the applicable conditions.

Define the conditions and select **Add** to move them to the **Selected Conditions** section.

Select **Apply.**

On the **Hyperfind Editor** page, verify that the conditions are correct.

Select **Save.**