System User Guide

Line Manager - Guide to Time Cards

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Contents

Introduction

This guide covers key tasks for Line Managers in the 'How to Review and Approve or Reject a Time Card' system process. It is related to the Process User Guide for Time Recording which is linked below.

Guide to Time Recording

The Guide to Time recording provides detail on the end to end business process around Time Cards including a glossary of terms.

Before You Start

New line managers should familiarise themselves with the Time Card entry process for their area as this differs across the University. Speak to your line manager, timekeeper for your area or school/department administrator for guidance.

There are three ways to action a Time Card approval request. You will likely first become aware that a Time Card requires approval by receiving an email. You can either click links within that email to approve or reject. Alternatively, you can navigate to People and Money and open your notifications to approve via the notification bell icon or within Team Time Cards also in People and Money.

The following guidance describes how to approve within the system but the information presented in both the email and the system is the same so this guidance will still be useful if you only approve from the email. It is not necessary to do it more than once.

As well as Approving and Rejecting a Time Card you can Edit it, but editing can only be done via the Team Time Cards app in People and Money. Please note the section on editing Time Cards.

Notes

There is an expectation of approvers to follow good practice when reviewing and approving Time Cards. All details should be checked, with particular attention to pay impacting fields such as Alternate Rate and Time Type. Costing codes can also be entered by the employee, so this should also be carefully checked.

Employees can only enter time against a specific date. Although the system will not stop users from entering larger number of hours against one day, the Time Card must accurately reflect the hours worked on a particular date. This has an impact on reporting and in some cases payroll deductions. Approvers are expected to check that time submitted is in line with what has actually been worked, wherever possible.

The system will not provide any additional information or alert to an approver when an employee is a Tier 4 or Student Visa holder. These employees have limits on their working hours but it is expected that approvers are aware of this and are not allocating work that sits out with this limit.

If a Time Card is rejected by the approver, the employee or timekeeper will be able to amend this and resubmit before the 10th of the month, without starting the entire process again.
This would then be resubmitted and the approver would receive another approval request.

If an employee has multiple assignments and they have entered time against all of those in the same Time Card, the line manager of each respective assignment will be required to approve the time before the Time Card can then go on to the payroll approval step. However, when one line manager approves the Time Card in People and Money, it is approved for **all assignments**. Therefore, it is best practice that line managers check (offline) with line manager colleagues in other areas that the Time Card can be approved.

Time Cards, including those that have been rejected and resubmitted, must be submitted and fully approved/submitted by Line Managers or Timekeepers by the 10th of the month for payment to the employee on the 28th of that month (except for December when the cut off will be earlier).

Once the Time Card has been approved/submitted for payment, the Payroll team have further work to undertake, including data loads and checks, before the Time Card is 'transferred ready for payment', which takes place on 20th of the month for payment to the employee of the 28th of the month.

If the employee, line manager or timekeeper edits a Time Card, between 11th and 20th inclusive of each month, the full Time Card will need to go back through the approval workflow. If the Time Card is not re-approved, this will prevent the original hours on the Time Card, which had previously been submitted/approved, from being transferred for payment as originally actioned. Such edits and approvals, during that time, would also mean that the hours originally approved for payment in that month would have effectively missed the deadline for payment in that month.

Therefore, a Time Card freeze on editing between 11th and 20th inclusive of each month has been put in place (apart from December when this will be earlier). **This means employees, line managers and timekeeper must not edit the Time Card which has been approved before it has been transferred for payment**. For example, January Time Cards approved/submitted by cut-off on 10th February, should not be edited between the 11th and 20th February inclusive to ensure payment on 28th February.

If the employee is ending their employment with the University, the Time Card must be submitted and approved before their last day of employment, to make sure that they are paid correctly. In exceptional circumstances, where the line manager has been unable to do this, the Guaranteed Hours – Final Time Card form should be completed.

Please review the Pay Dates and Deadlines webpage for Time Card submission deadlines.

In Brief

This section is a **simple overview** of how to navigate and take action within Time Cards and should be used as a reminder. More detailed information, screen shots and tips s provided within the In Detail section.

How to Generate a Time Card on Behalf of an Employee

1. From the Homepage, under the **My Team** tab, click **Show More** at the bottom of the Quick Actions.
2. Under the **Time** section, choose either **Add Current Time Card** or **Add Other Time Card**.
3. Search for the employee you wish to add a Time Card for or select one of your direct reports (if you have any).
4. For Add Current Time Card: The Time Card for the current month will appear.
5. For Add Other Time Card: Click Add to create a time entry. Enter the start date of the Time Card and click Add.
6. Complete the relevant fields and click the **Save** button if you have more hours to input for that month, or the **Submit** button if you have entered all of the relevant hours for the employee.

How to Approve or Reject a Time Card via People and Money

1. Select and open the approval request in the **Bell** notification.
2. Review the data entered within the notification.
3. Approve/reject the timesheet.

How to Approve a Time Card via the Team Time Cards app in People and Money

1. From the Homepage, under the **My Teams** tab, click **Show More** at the bottom of the Quick Actions
2. Under the **Time** section, click **Team Time Cards**.
3. Remove the default **Dated Range** filter (two weeks).
4. Click on the **Relative Range** filter and select a period.
5. Click on the **Status** filter and select **Submitted**.

6. Search for employee or select from list.
7. Click on the **blue text** next to the employee's name to open the Time Card.
8. Click on **Approve**.

How to Edit an Employee's Time Card

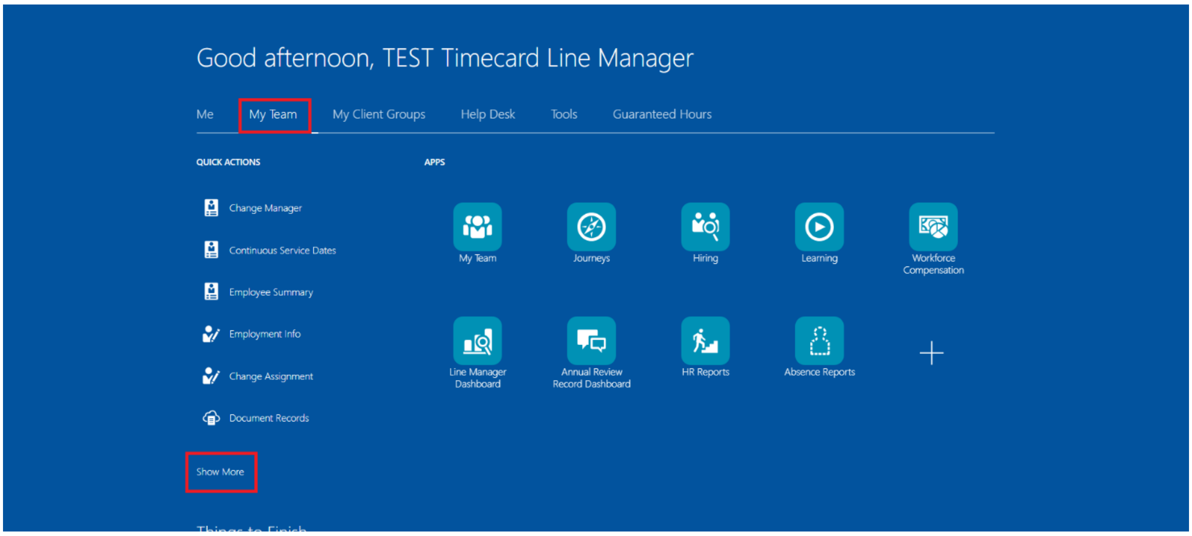
1. From the Homepage, under the **My Teams** tab, click **Show More** at the bottom of the Quick Actions.
2. Under the **Time** section, click **Team Time Cards**.
3. Remove the default **Dated Range** filter (two weeks).
4. Click on the **Relative Range** filter and select a period.
5. Search for employee or select from list.
6. Click on the **blue text** next to the employee's name to open the Time Card.
7. Amend whatever is necessary by overwriting the fields.
8. Click on the **Actions** button and select **Submit**.

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

How to Generate a Time Card on Behalf of an Employee

1. From the Homepage, click the **My Team** tab. Scroll down and at the bottom of the **Quick Actions**, click **Show More**.



2. Scroll down until you see the **Time** section, there are two options for creating a Time Card:
   1. **Add Current Time Card** – this option will take you to the Time Card for the

current month you are in.

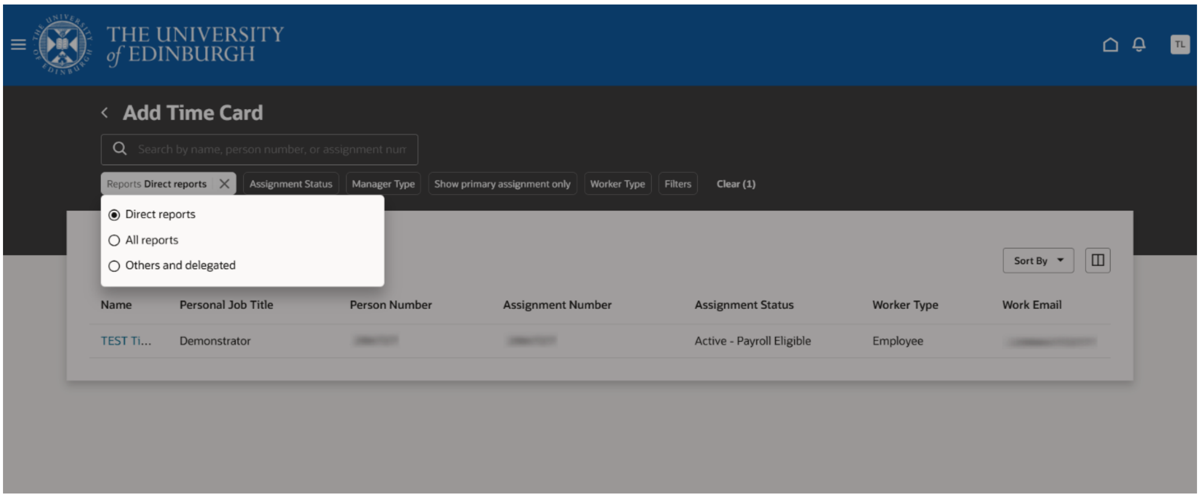
2. **Add Other Time Card** – this option will allow you to add a Time Card for either the month you are in or for previous months. Any Time Cards added for previous months will be reflected in the following month's pay.

Via Add Current Time Card

3. Select the **Add Current Time Card** tile.

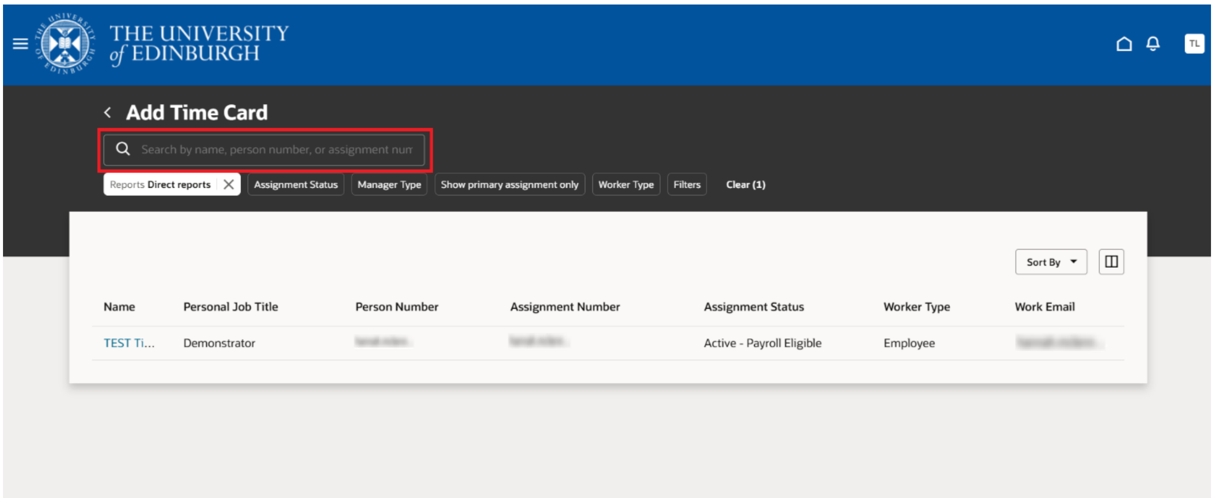
4. **Do not** remove **the Reports Direct reports** filter (removing this filter may show inactive assignments which you cannot add a Time Card for).

   If you are both a Line Manager and Timekeeper, you can change this filter to show everyone in your area of responsibility by clicking on the filter and selecting **Other and delegated**.

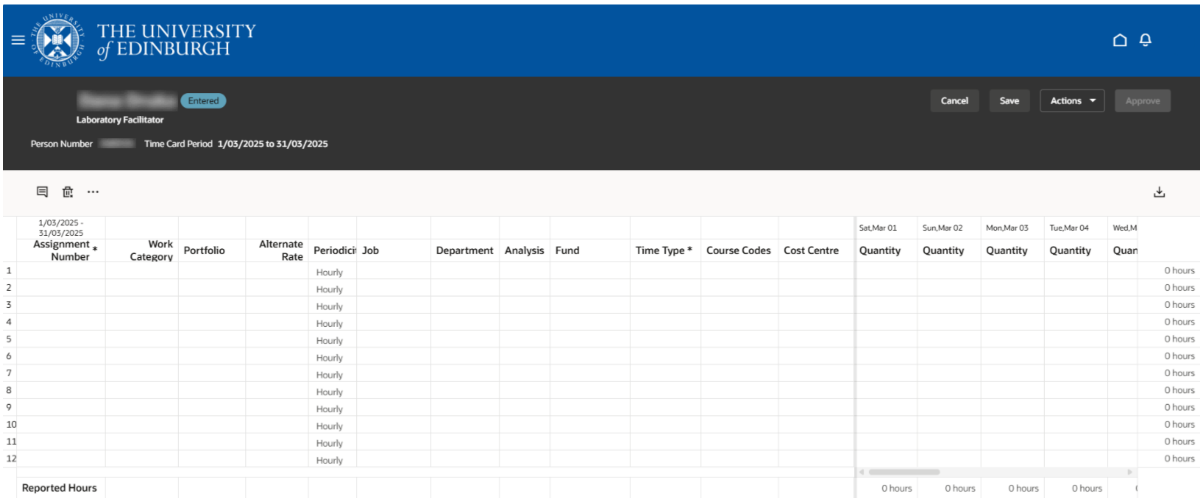


5. Search for the employee you wish to add a Time Card for either by their name, Person Number, or Assignment Number. Alternatively, select from the list below the search bar. To open the Time Card, click on the Period Start Date (blue text) next to the employee's name.

   You can also filter by Worker type – Employee (**do not** use Contingent Worker, Pending Worker to Non-Worker).

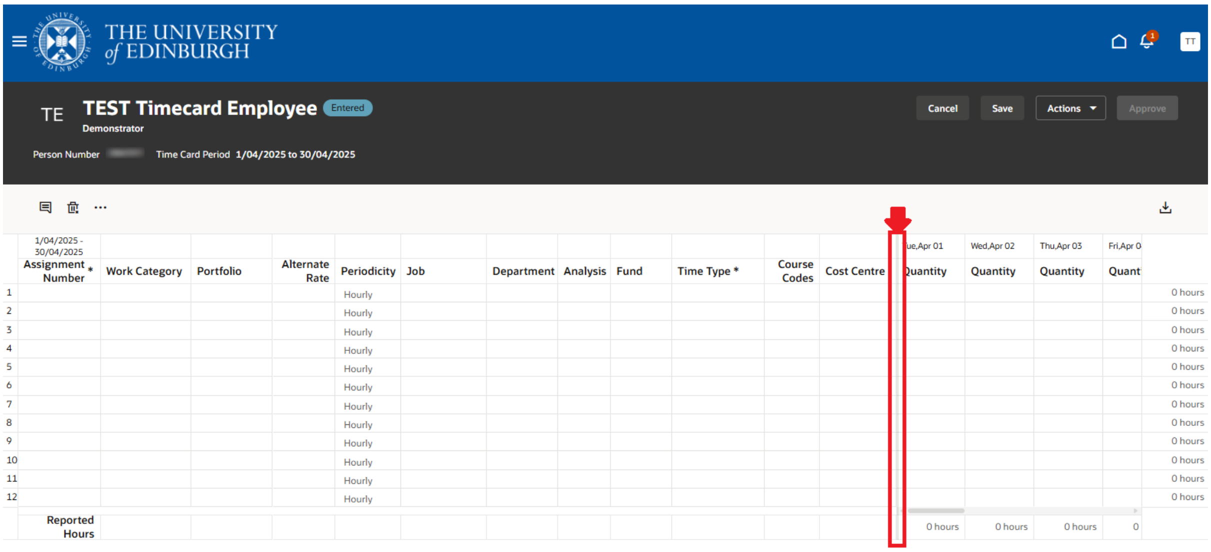


6. The Time Card for the current month will be displayed.



7. Reduce the size of each of the column to make the hours columns visible. You may also need to reduce the Zoom percentage to 67% in your browser (press and hold Ctrl on your keyboard and scroll on your mouse).

   You can also move the grey dividing line which appears on the right hand side of the Time Card to the left of the Assignment Number column (a hand symbol will appear when you hover your cursor over the line which will allow you to drag it). A scroll bar will then appear at the bottom of the Time Card, making it easier to navigate across the columns.



8. Complete the relevant fields by double clicking in each cell to activate the drop-down menus.

Assignment Number – Mandatory field with a drop-down menu that refers to the employee's work assignment (job). Double click in the cell to see the drop-down menu and select the correct assignment. If they only hold one assignment with the university this is normally their employee number. If they hold multiple assignments, each assignment has a number (normally their employee number with e.g., a – 2 or 3 etc. at the end). Please ensure you use the correct number to ensure they are paid at the correct rate of pay.

Note: if you don't think the correct position is visible or the incorrect details, it could be due to the short delay in scheduling job with add assignment or change of line manager. Please wait a couple of hours and try again.

Work Category – Optional field that contains a list of values that refer to the type of work done. Please complete this wherever possible. Full list is as follows:

- Demonstrating
- Development
- Lecturing
- Marking
- Maternity/Parental
- Other Absence
- Other Work Types
- Preparation Time
- Research
- Sickness
- Teaching

- Tutor: Honours
- Tutoring

Portfolio – Optional field that contains a list of values that refers to buildings where the work has been undertaken. This will only be applicable to non- academic positions, such as catering staff. Please complete this wherever possible.

Alternate Rate – Optional textbox that is to be used ONLY on the occasion that the employee completes work where they would be paid at a different rate to their normal rate of pay. The value should be entered as numeric value with 2 decimal places, e.g., enter 10.00 to be paid £10 per hour.

You should only use this field if it has been previously agreed that the work done is to be paid at a rate that is different to the normal contracted rate of the employee's assignment. Otherwise, leave it blank. Refer to the part time pay scales on the university website to convert a grade and scale point to a numeric value.

Periodicity – Auto-filled field with 'Hourly'.

Job – Auto-filled field based on Assignment Number.

Department – Auto-filled field based on Assignment Number.

Analysis – With additional information this may be used for local reporting.

Fund – This field only needs completed if costs are to be allocated to different codes from the employee's assignment, e.g., General unrestricted.

Time Type – Mandatory field. Refers to the type of hourly based payment to be made. Only the time types that the employee is eligible for will appear in the drop-down menu. The full list as follows:

- Additional Hours
- Call Out
- Guaranteed Hours
- Intern Hours
- Overtime x0.5
- Overtime x1
- Overtime x1.2
- Overtime x1.5
- Overtime x2

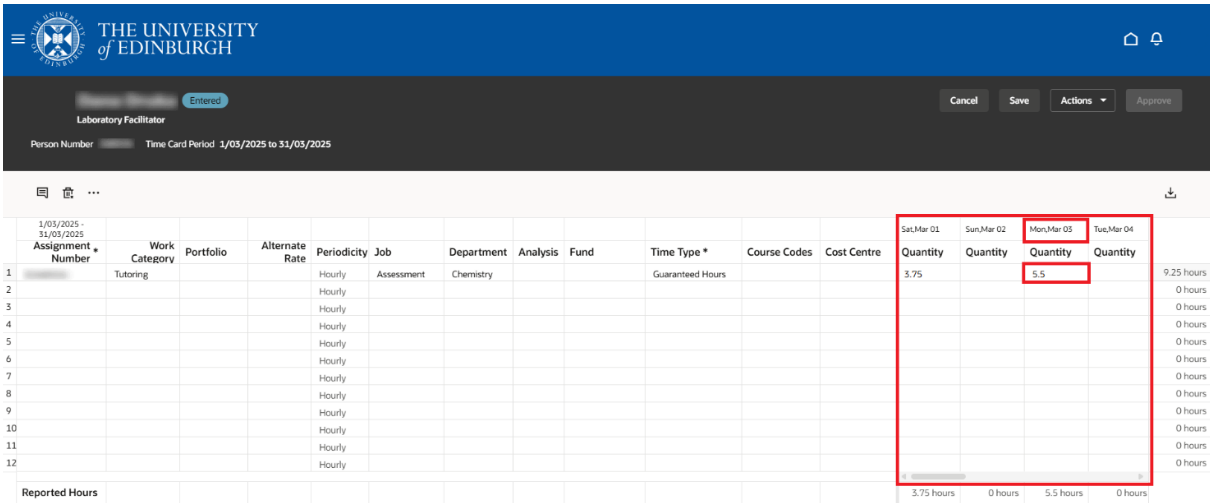
- Premium Band Overtime
- Union Duties

For more information on eligibility please refer to the Guide to Time Recording. For more information on when each type of Overtime should be applied can be found in the appropriate Conditions of Service document.

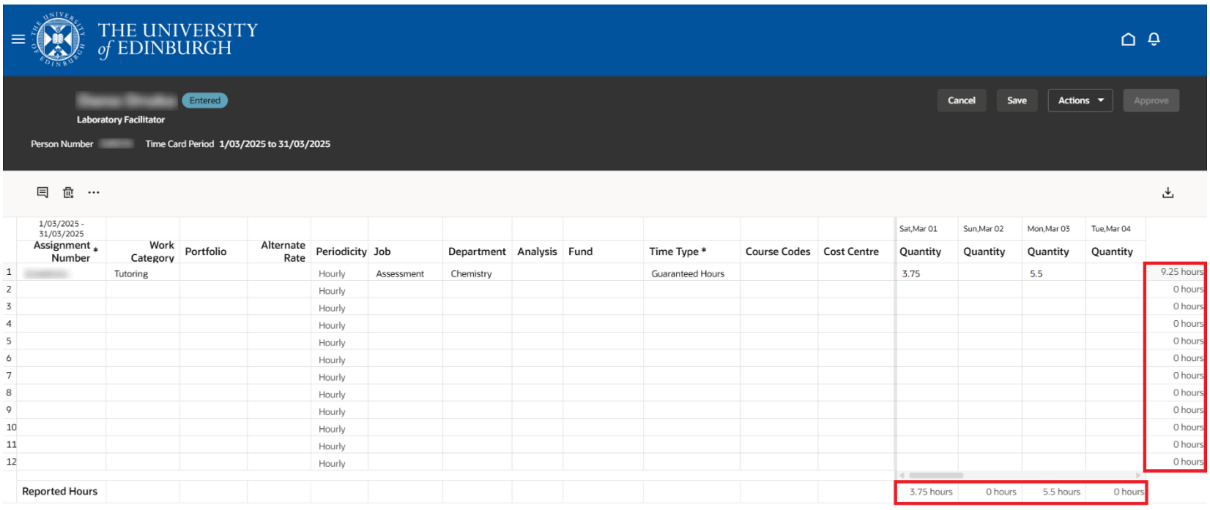
Course Codes – Optional field that contains a searchable list of values that refer to specific academic courses. This will only be applicable to academic positions. If the work the employee has done was in relation to a specific course, please complete this wherever possible.

Cost Centre – Optional field. If you are unsure of what to put, just leave this field blank. This will normally only apply when the employee has worked in a department that is not the one that their contract of employment relates to.

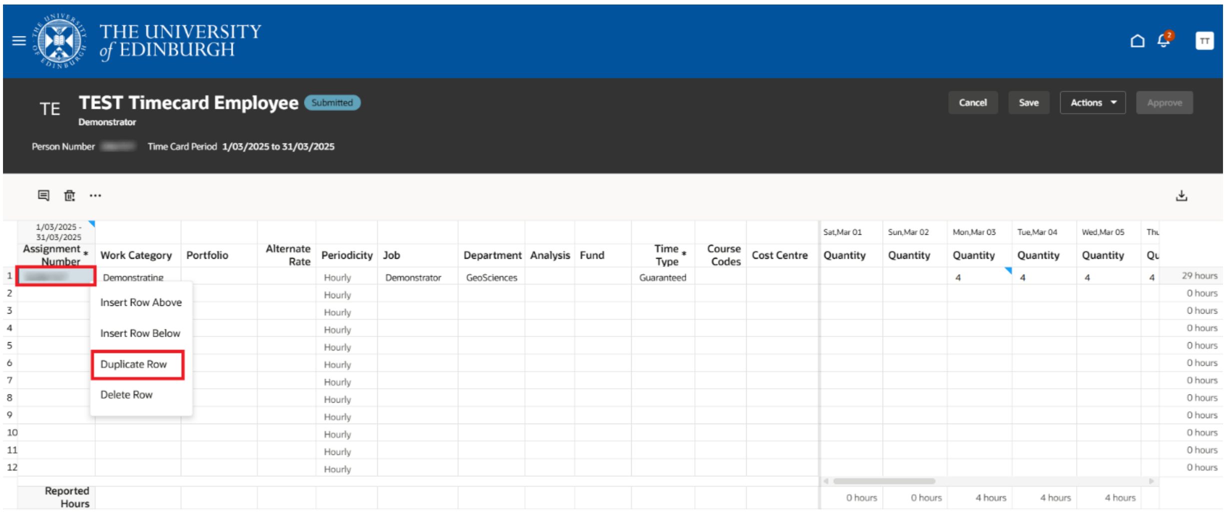
Quantity – The days of the month are shown on the right-hand side of the Time Card. If you cannot see the days of the month, please reduce the column sizes and the Zoom percentage of your browser. For each specific day the employee has worked, enter the number of hours on the Time Card, using the scroll bar to move between the days of the month. Hours can be entered to a maximum of two decimal points (e.g. 4 hours and 30 minutes would be entered as 4.50 hours). It is not possible to enter hours over a time period of more than a day e.g., 20 hours over a week or month. Hours must be allocated to a specific day and must accurately reflect the hours the employee worked on that day.



Note: The Time Card will automatically calculate the total number of hours worked for each assignment in the column at the end as shown below. The total number of hours worked per day for all assignments is shown at the bottom of the Time Card.

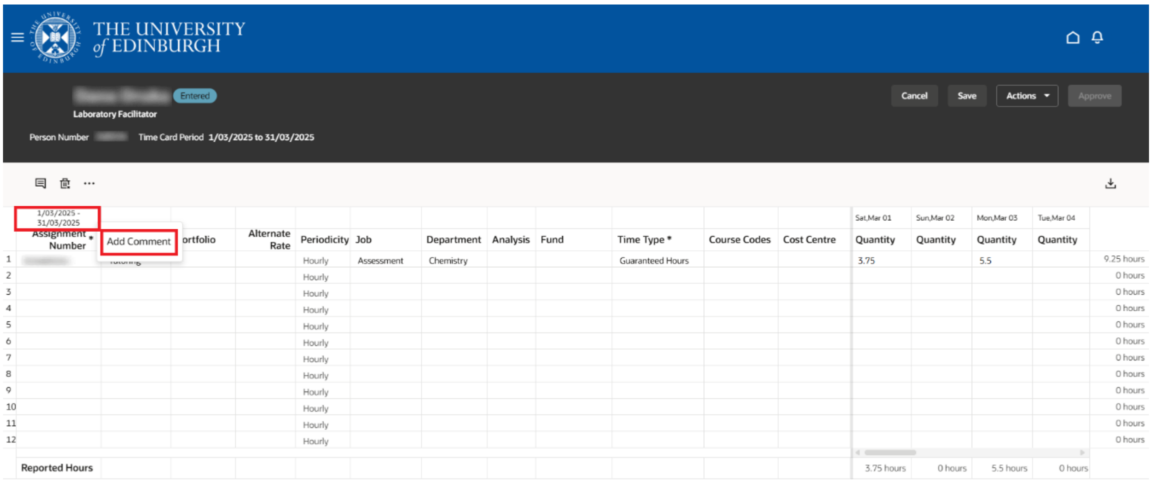


9. If the employee holds multiple assignments, move down to the next row and repeat step 6 to record the hours worked for each assignment. Alternatively, you can copy the information you have just entered in row 1 by right clicking on any of the fields in row 1 and selecting **Duplicate Row**. Please check the quantity of hours worked is correct for each row.

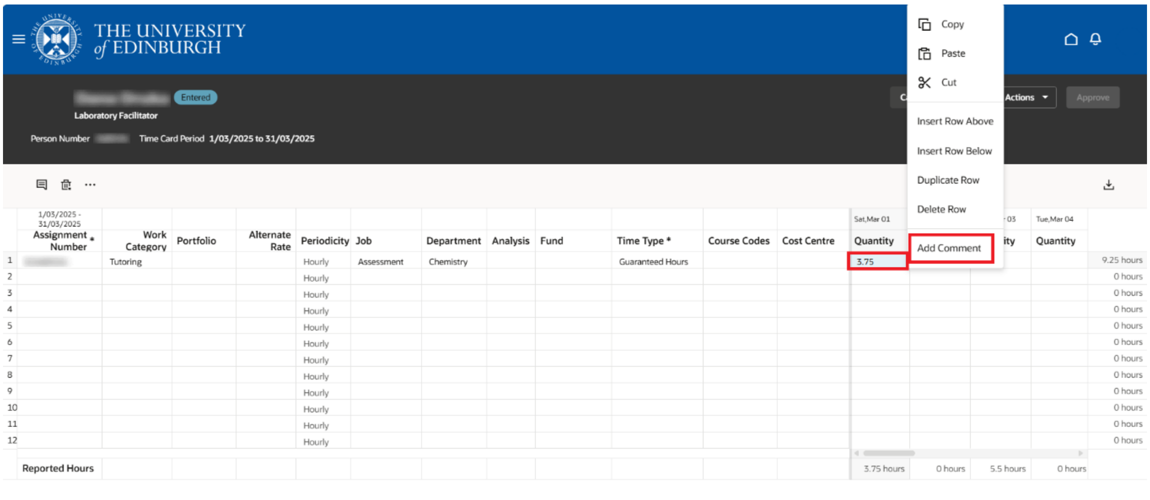


Similarly, if some of the hours need to be charged to a specific course code, costing codes or a different time type these can be recorded on the row(s) below (e.g. if the employee worked 5 hours of overtime, you would record the first 2 hours in row 1 using the Time Type 'Overtime 1.0' and the remaining 3 hours in row 2 using the Time Type 'Overtime 1.5').

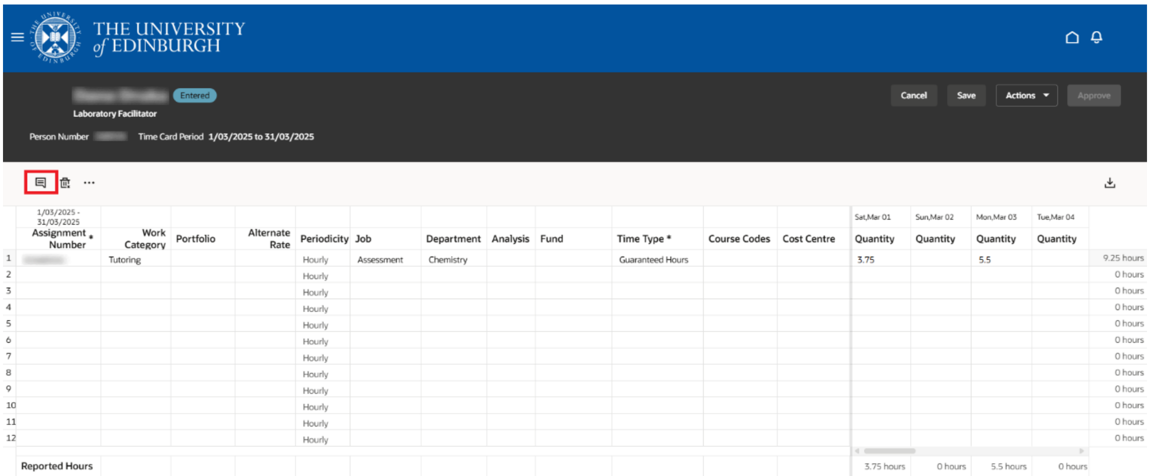
10. Comments can either be added to the overall Time Card or for a specific day within the Time Card:
    a) To add a comment to the overall Time Card, right click on the time period dates field and select **Add Comment**. Click **Save**.



b) To add a comment to a specific date on the Time Card, right click on the hours you have entered for that day and select **Add Comment**. Please note, you cannot add comments to blank fields. Click **Save**.



c) To view all of the comments you have made, select the **View Comments** icon.



11. If you have added all of the employee's hours for that month and it is now ready to be

approved, click **Actions** > **Submit** in the top right-hand corner (Note: the Approve button is greyed out). The Time Card will still need to be approved after it has been submitted (see [How to Approve or Reject a Time Card in People and Money](#)).

If you wish to **Save** the Time Card so that you can add more hours to it later, click **Save**. Remember to click **Submit** once you have finished adding all of the employee's hours.

Via Add Other Time Card

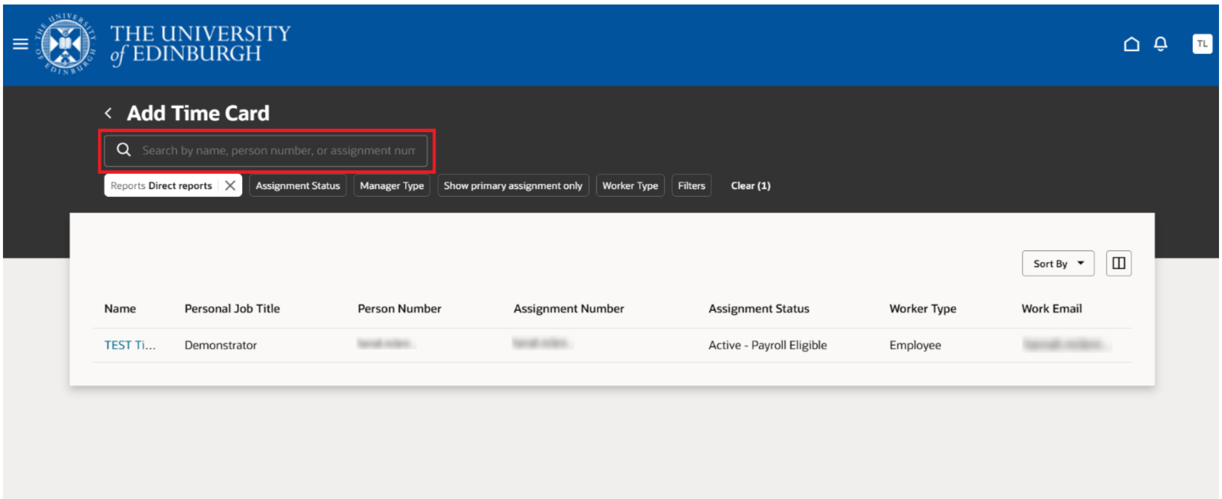
12. From the Homepage, click the **My Team** tab. Scroll down and at the bottom of the **Quick Actions**, click **Show More**.

13. Scroll down until you see the **Time** section and select **Add Other Time Card**.

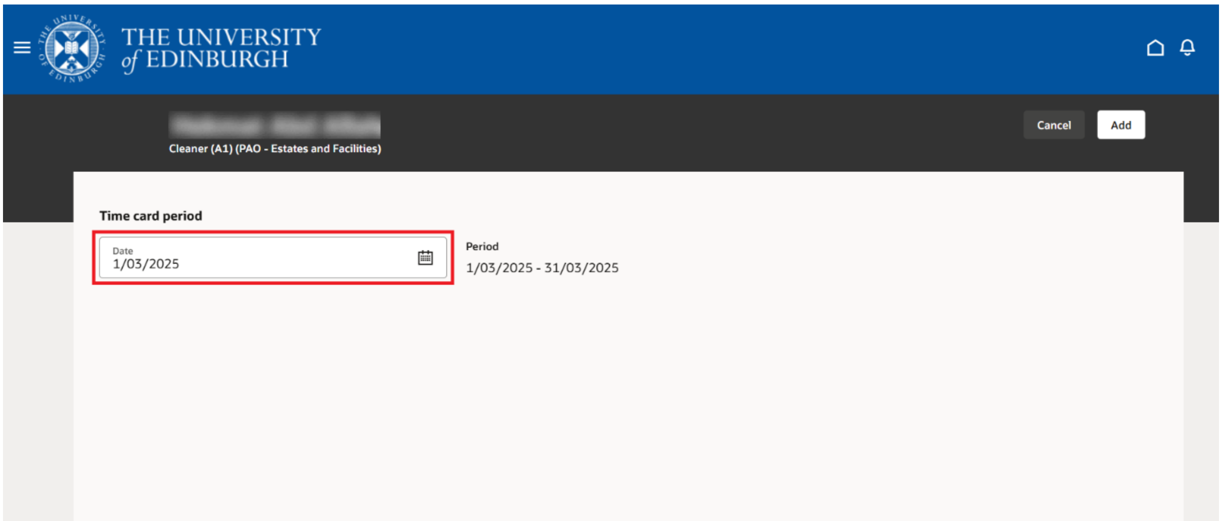
14. **Do not** remove **the Reports Direct reports** filter (removing this filter may show inactive assignments which you cannot add a Time Card for).

    If you are both a Line Manager and Timekeeper, you can change this filter to show everyone in your area of responsibility by clicking on the filter and selecting **Other and delegated**.

15. Search for the employee you wish to add a Time Card for or select from the list below the search bar. To open the Time Card, click on the Period Start Date (blue text) next to the employee's name.



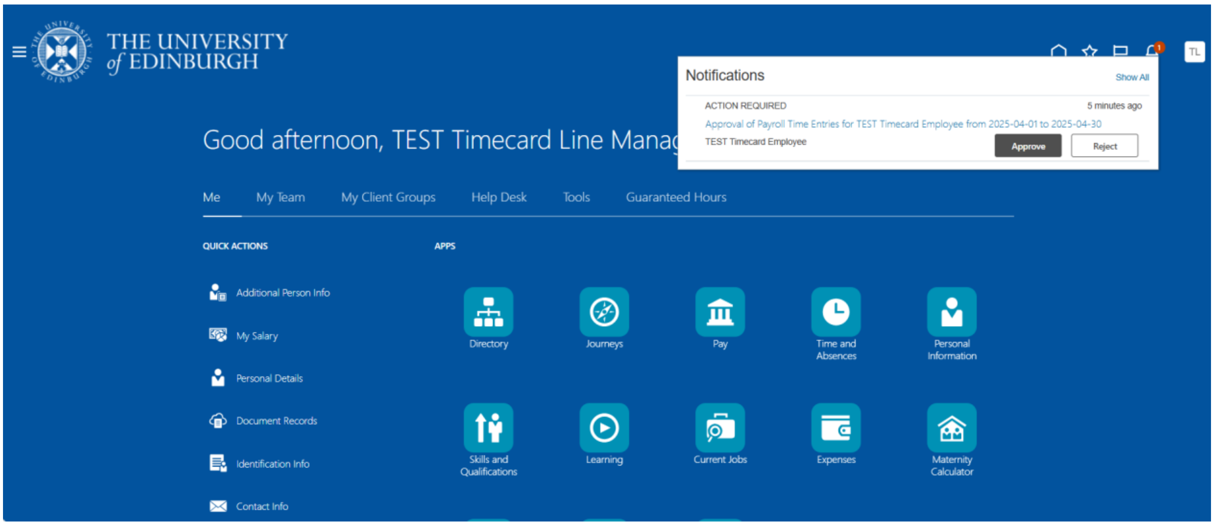
16. Select the date for the Time Card period and click on **Add** at the top of the page.



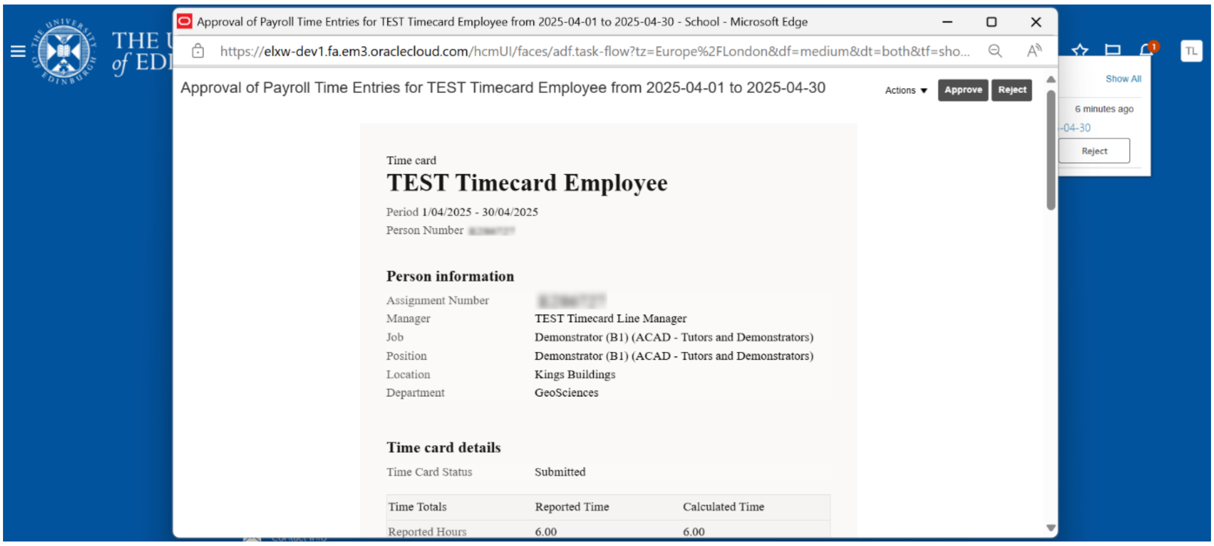
17. Follow steps 7 to 11 above.

How to Approve or Reject a Time Card via People and Money

1. Click on the Bell notification icon at the top of the page. Select and open the approval request by clicking on the blue title text.



2. A window showing details of the approval request will open for you to review.



a) Approve and Reject buttons

- Clicking **Approve** confirms the Time Card as ready to go to payroll for payment.
- Clicking **Reject** will send a notification to the employee advising the timesheet has been returned to them and requires further action.

b) Actions – Gives you more options as follows:

- **Request Information:** This option will not do anything – there is a known system issue meaning that using this option will not work, **so please do not use**.

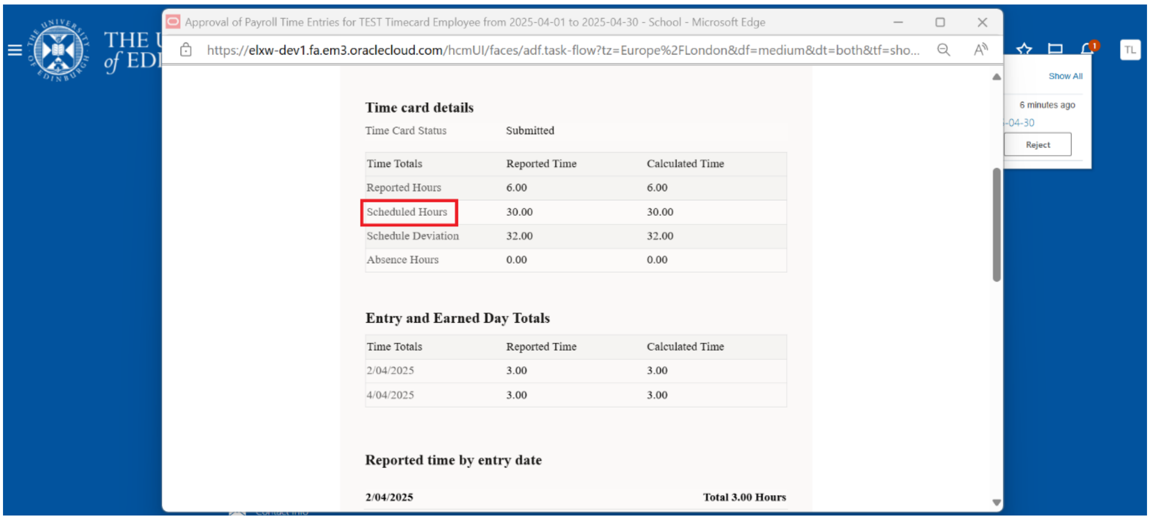
- **Reassign:** allows the line manager to pass the approval request to another user for them to action.

- **Escalate**: passes the request to the Line Manager's Manager for them to action.

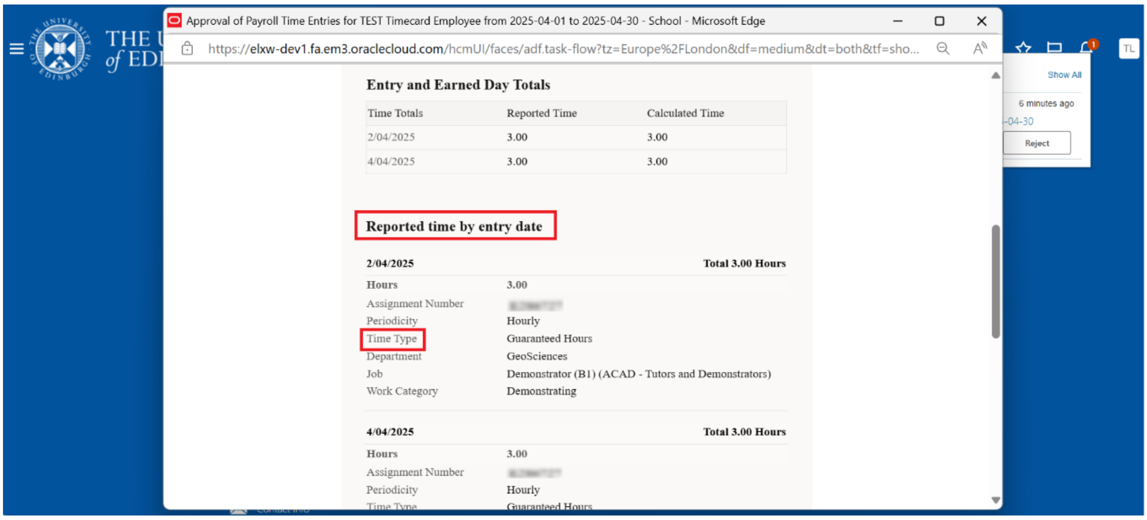
- **Suspend:** Puts the request in a state where it cannot be approved or rejected but can be resumed. There should not normally be any need to use this option as this does not add any value to the process, **so please do not use**.

c) An overview of the employee's details.

d) You will need to scroll down to see Submitted hours they are requesting you to authorise.



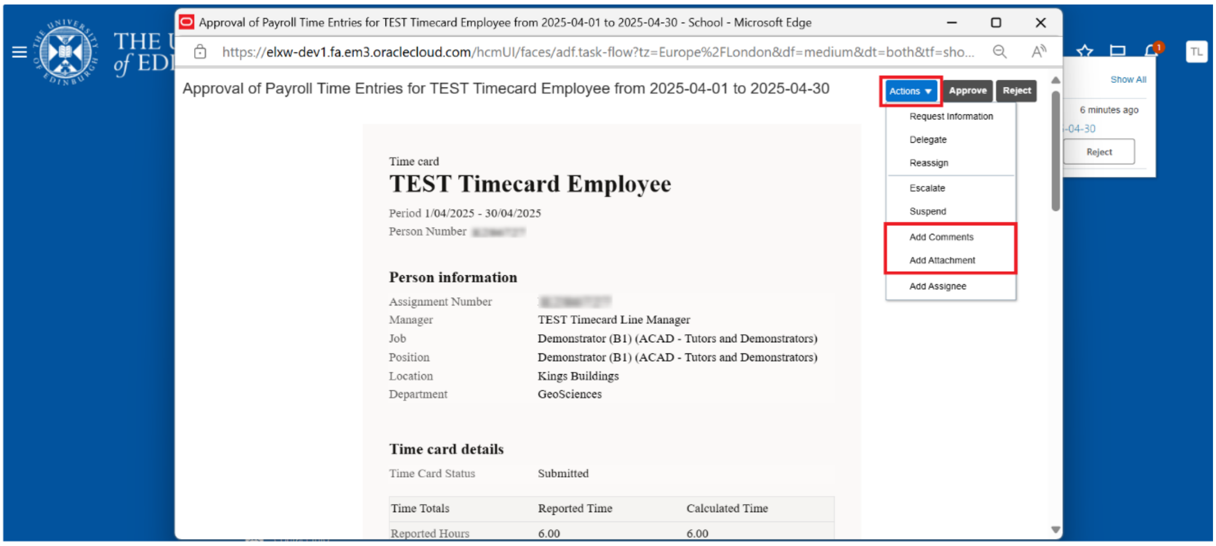
e) Under the **Reported time by entry date** heading, you can see the Time Type selected, check this is correct. Check Alternate Rate as this is the rate the employee will be paid and should only be specified if they are getting paid at a different rate to their normal rate. If this doesn't apply the field should be left blank.



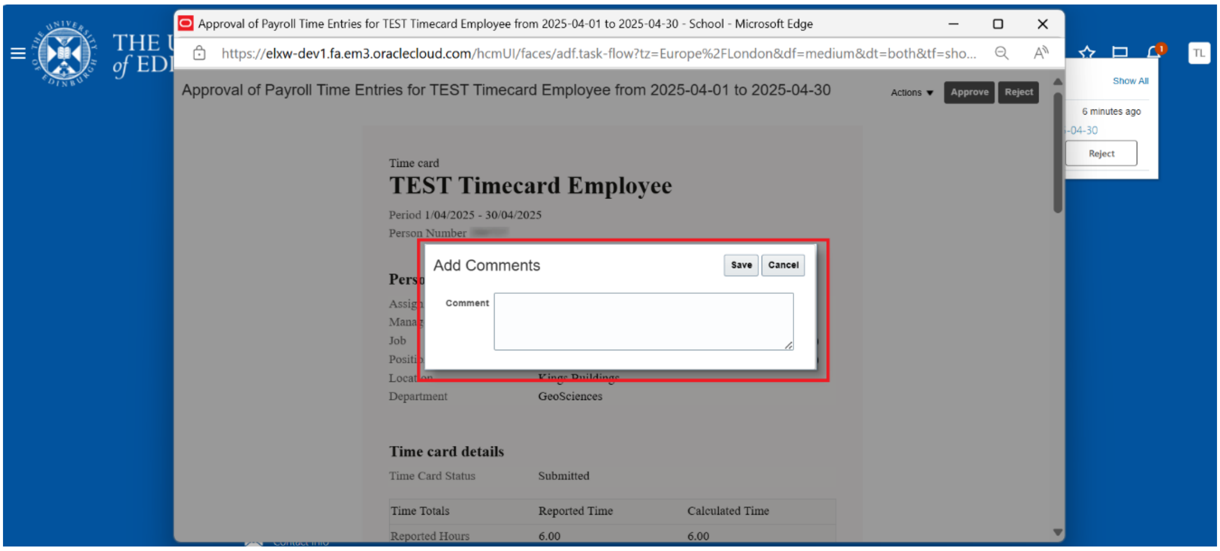
3. If the employee has added comments to their Time Card you cannot see them in this view, you can only view comments in the Team Time Cards app (see How to Approve a Time Card via the Team Time Cards app in People and Money section).

4. Click on either **Approve** or **Reject** depending upon the action to be taken.
    1. Clicking **Approve** confirms the Time Card as ready to go to payroll for payment.
    2. Clicking **Reject** will send a notification to the employee advising the timesheet has been returned to them and requires further action.

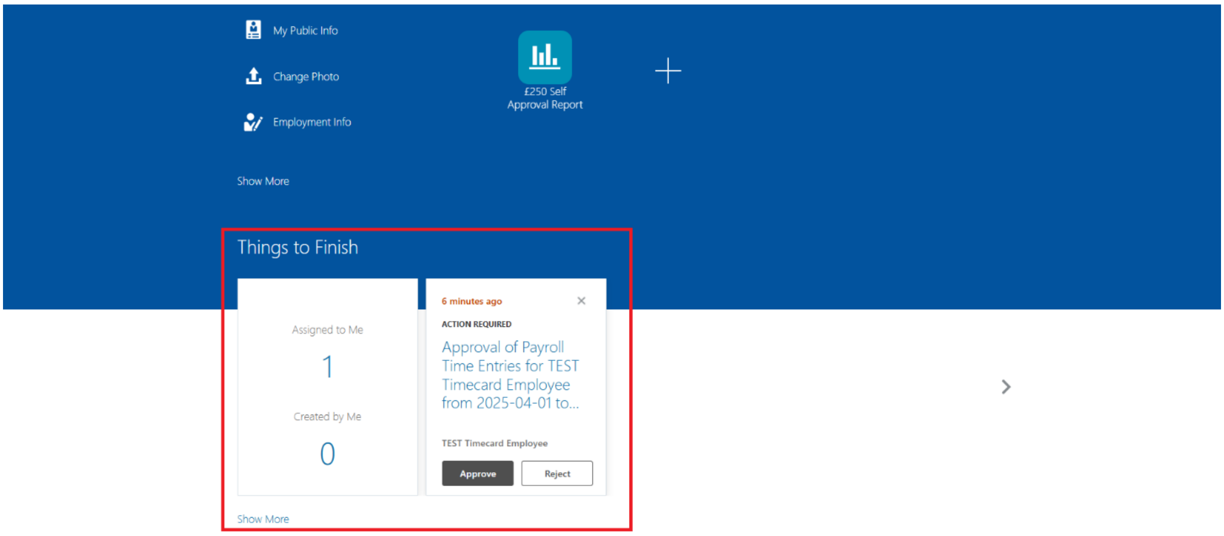
Note: If you wish to reject the Time Card then a comment must be added. It is good practice to explain in the comments field why the sheet has been rejected and specifically mention which entries are an issue. You also have the option to add an attachment.



You will need to do this before clicking on the Reject button. You will do this by clicking on the **Actions** button and select **Add Comments** and once completed click **Save**.

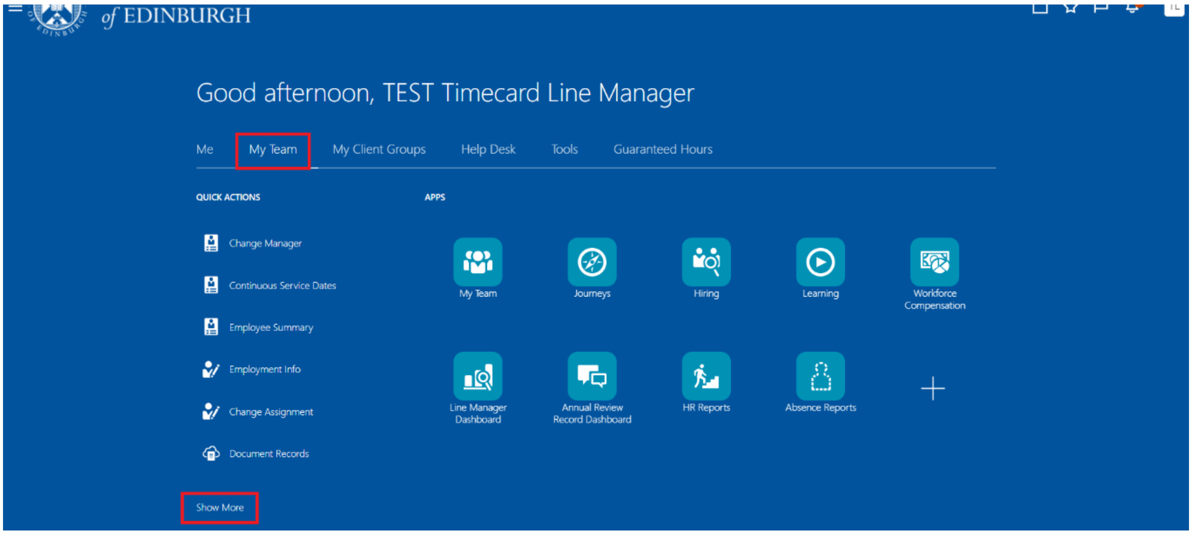


Note: The approval request/open actions also can be accessed from **Things to Finish** area in the **Home** page.

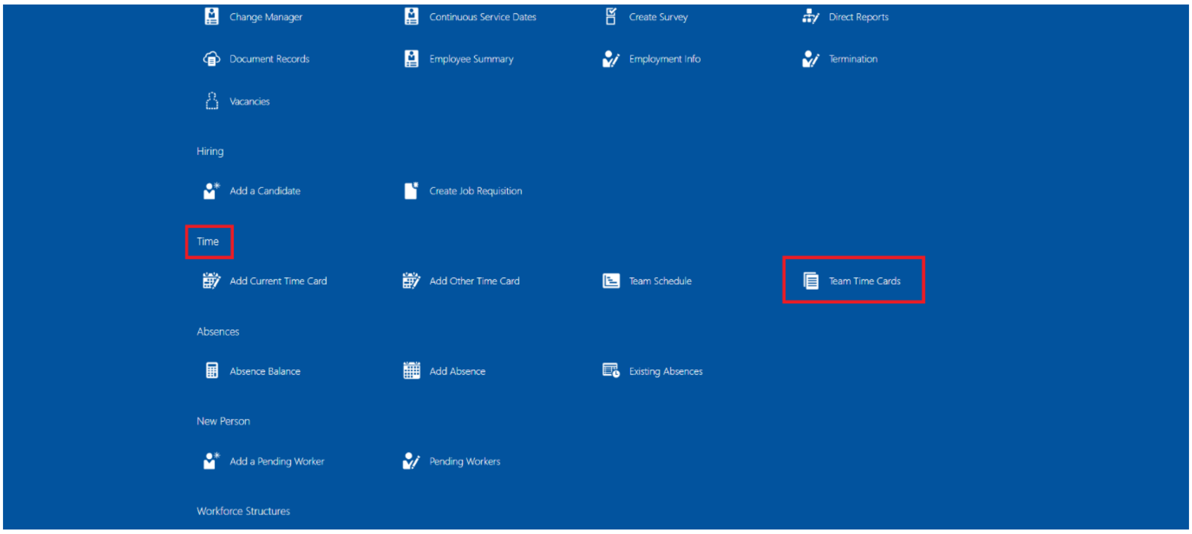


How to Approve a Time Card via the Team Time Cards app in People and Money

1. From the Homepage, under the **My Team** tab, click **Show More** at the bottom of the Quick Actions.



2. Under the **Time** section, click **Team Time Cards**.



3. All of the filters are situated under the search bar. Remove the default **Dated Range** filter (two weeks) by clicking on the cross.

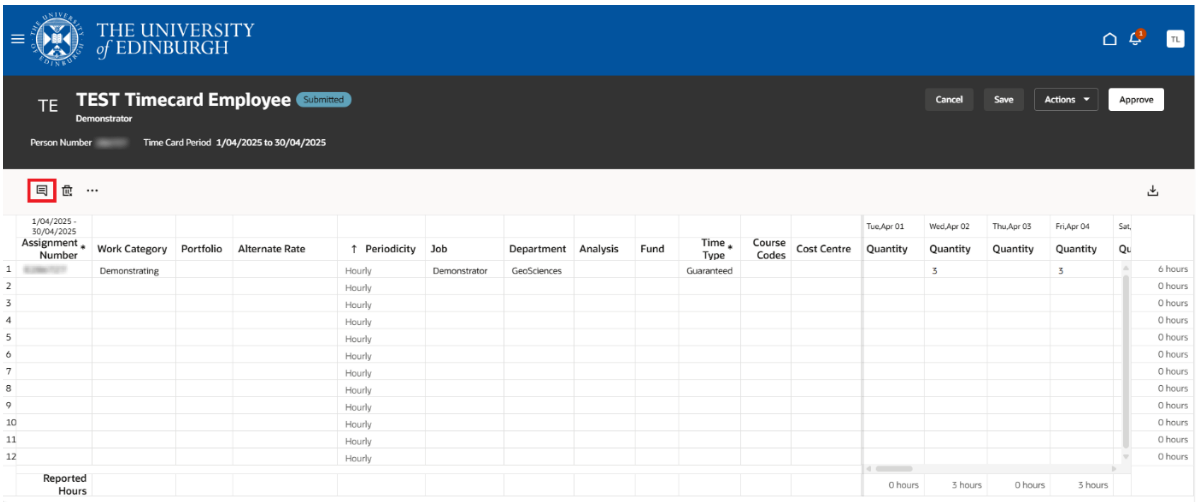
4. Click on the **Relative Range** filter and select a period (select Previous Month, Previous 3 Months or Previous 6 Months. Alternatively, you can select a specific time period using the Dated Range filter).

5. Click on the **Status** filter and select **Submitted**. You should also review Time Cards with a 'saved' status and remind the employee to submit for approval. Any hours sitting at the saved status won't be processed by payroll.

6. You can use other filters to refine your search further.

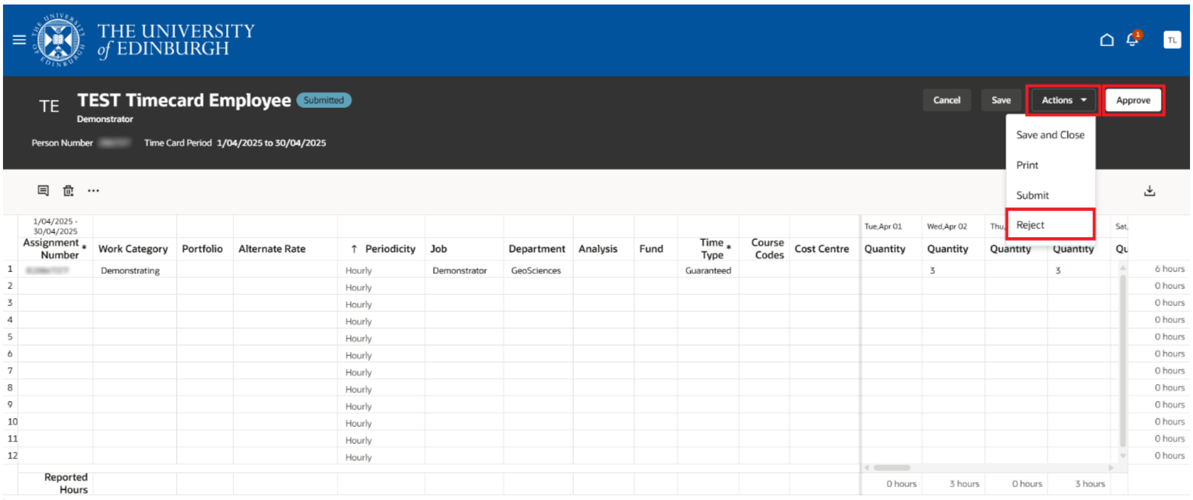
7. Search for the employee by their Name, Person Number or Assignment Number or select from the list below the search bar. To open the Time Card, click on the Period Start Date (blue text) next to the employee's name.

8. Review the Time Card. Check for comments by clicking on the Comments icon.



9. If the employee has entered hours for multiple assignments across different departments, you must check with the line managers (offline) in the relevant areas before approving or rejecting the Time Card. Once one of the line managers of those assignments has pressed Approve, approval will be given to **all assignments** listed on the Time Card.

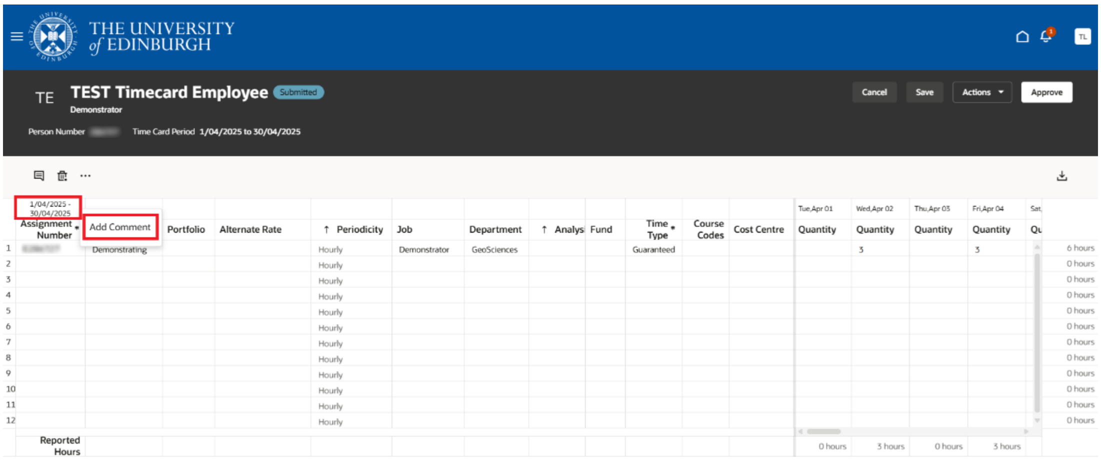
10. Once you have reviewed the Time Card, you have two options:



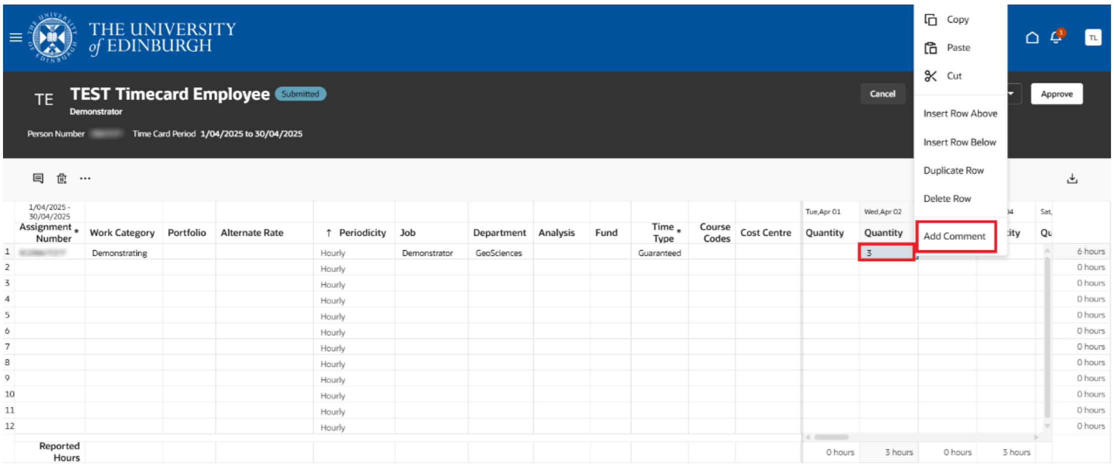
a) Clicking **Approve** confirms the Time Card as ready to go to payroll for payment.
b) Clicking **Actions** and **Reject** will send a notification to the employee advising the timesheet has been returned to them and requires further action.

Note: If you wish to reject the Time Card then a comment must be added. It is good practice to explain in the comments field why the sheet has been rejected and specifically mention which entries are an issue. You can add a comment to a specific populated field or the overall Time Card.

- To add a comment to the overall Time Card, right click on the time period dates field and select **Add Comment**. Click **Save**.

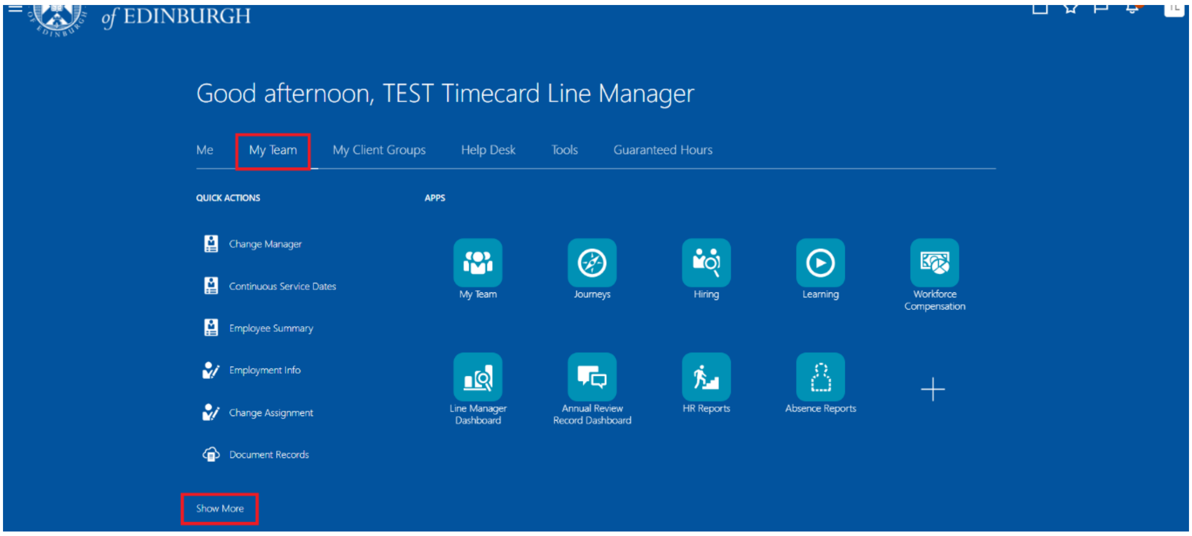


- To add a comment to a specific date on the Time Card, right click on the hours for the specific day and select **Add Comment**. Please note, you cannot add comments to blank fields. Click **Save**.

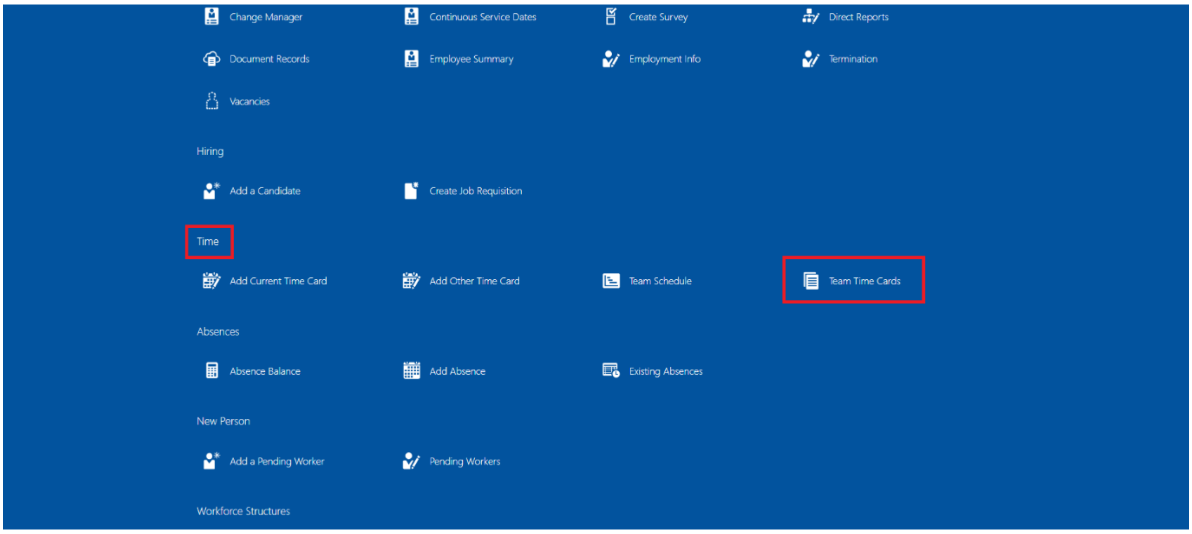


How to Edit an Employee's Time Card

1. From the Homepage, under the **My Team** tab, click **Show More** at the bottom of the Quick Actions.



2. Under the **Time** section, click **Team Time Cards**.



3. All of the filters are situated under the search bar. Remove the default **Dated Range** filter (two weeks) by clicking on the cross.

4. Click on the **Relative Range** filter and select a period (Select Previous Month, Previous 3 Months or Previous 6 Months. Alternatively, you can select a specific time period using the Dated Range filter).

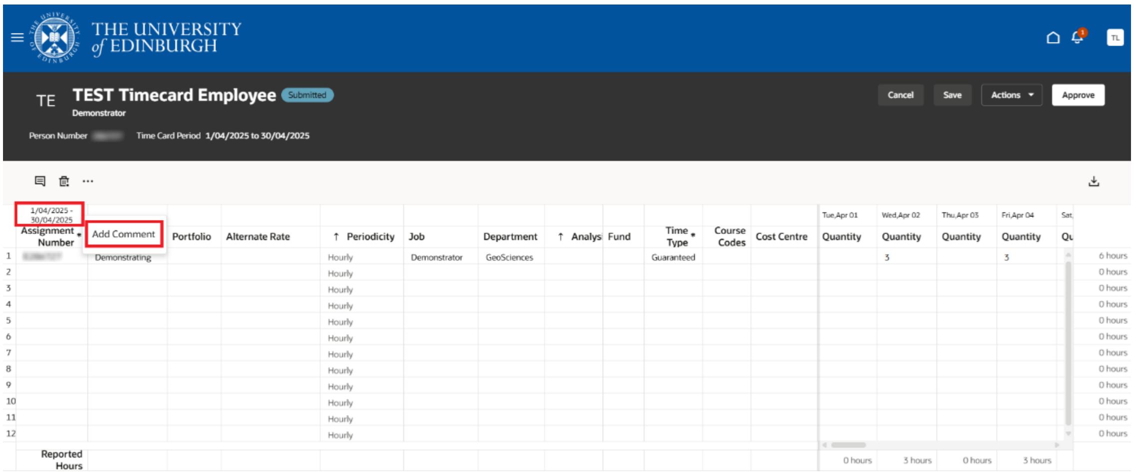
5. Click on the **Status** filter and select **Submitted**. You should also review Time Cards with a 'saved' status and remind the employee to submit for approval. Any hours sitting at the saved status won't be processed by payroll.

6. You can use other filters to refine your search further.

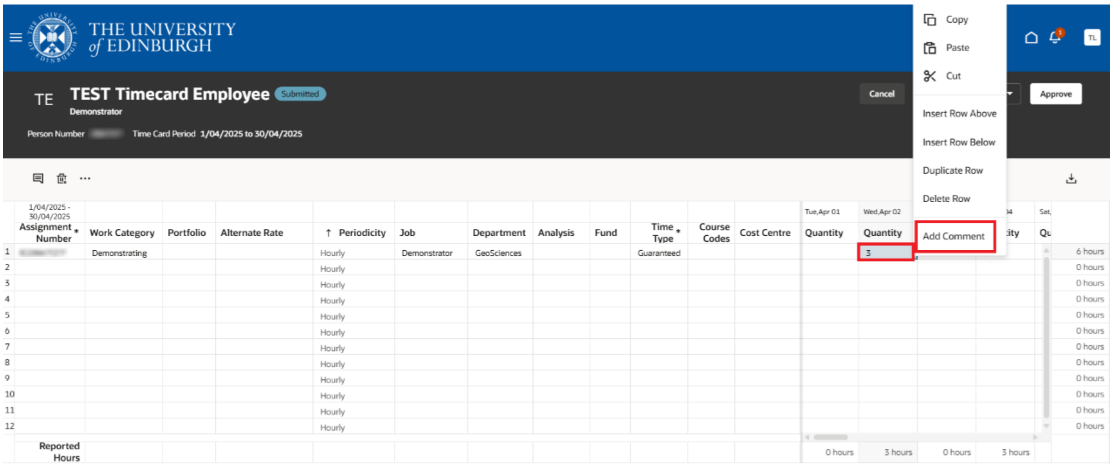
7. Search for the employee by their Name, Person Number or Assignment Number or select from the list below the search bar. To open the Time Card, click on the Period Start Date (blue text) next to the employee's name.

8. Amend whatever is necessary by overwriting the fields.

9. Comments can either be added to the overall Time Card or for a specific day within the Time Card:
   a) To add a comment to the overall Time Card, right click on the time period dates field and select **Add Comment**. Click **Save**.



b) To add a comment to a specific date on the Time Card, right click on the hours for the specific day and select **Add Comment**. Please note, you cannot add comments to blank fields. Click **Save**.



10. Click the **Actions** button and **Submit**.

Editing Approved Time Cards

If the employee, line manager or timekeeper edits a Time Card for that month's payment, between 11th and 20th inclusive of each month, the full Time Card will need to go back through the approval workflow. If the Time Card is not re-approved by the payroll cutoff, this will prevent the original hours on the Time Card, which had previously been approved from being transferred for payment as originally actioned. Such edits and approvals, during that time, would also mean that the hours originally approved for payment in that month would have effectively missed the deadline for payment in that month.

Viewing Approved Time Cards

Employees, line managers and timekeepers can view Time Cards, which have been approved/submitted for payment to Payroll at any time, including the time between approval/submission and the time at which Payroll transfers the hours as ready for payment.

It is vital however, that once you have viewed the Time Card, you press the '**Cancel**' **button**. By cancelling, you will exit out of the screen without changing the status of the Time Card and the Time Card will be paid as expected.

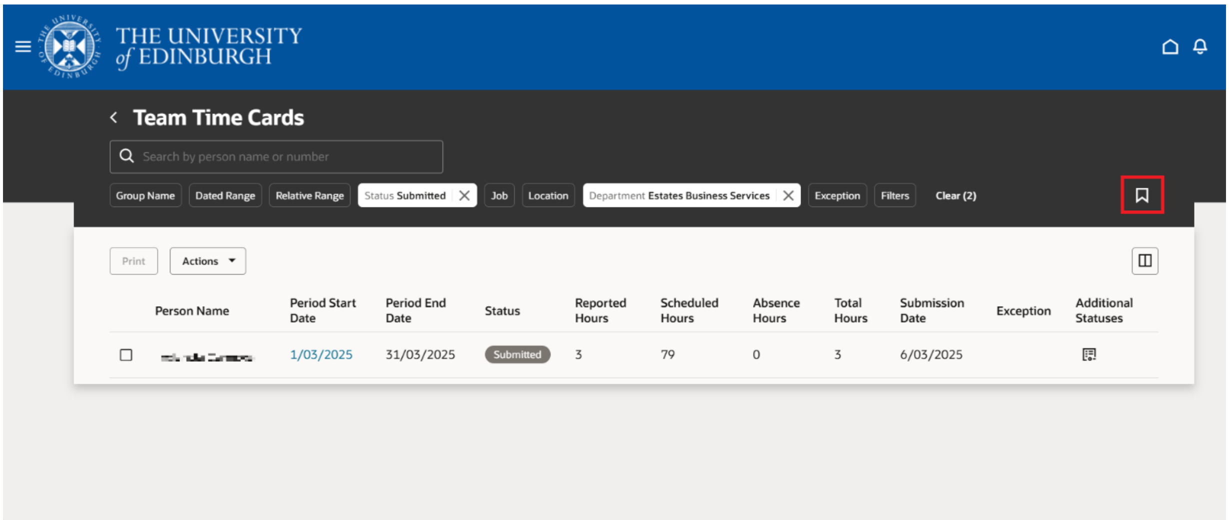
If the user exits the screen by pressing the 'Submit' button, the Time Card status will change back from approved to submitted and will go back through the approval workflow, even if there has been no change made to the record. This will prevent the Time Card being paid as expected. The system is working as designed, but those previously approved hours will now require another approval – in time for the next available payroll date - before they are paid. This means that hours approved in time for one month's payroll date can miss that payroll date, without it being apparent that they have been effectively deferred to the next payroll date.

How to set up a saved search (filters in the Team Time Cards app)

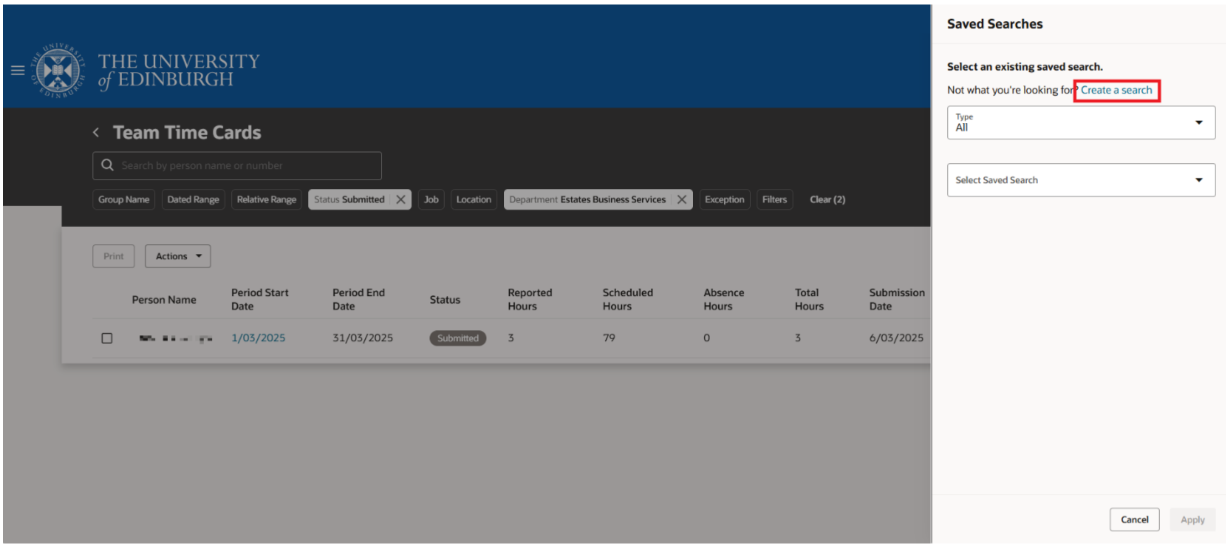
It is possible to set up saved searches on Time Cards if you have certain criteria you want to look out for on a monthly basis.

1. From the Team Time Cards app, select all of the filters that you would like to have within your search.

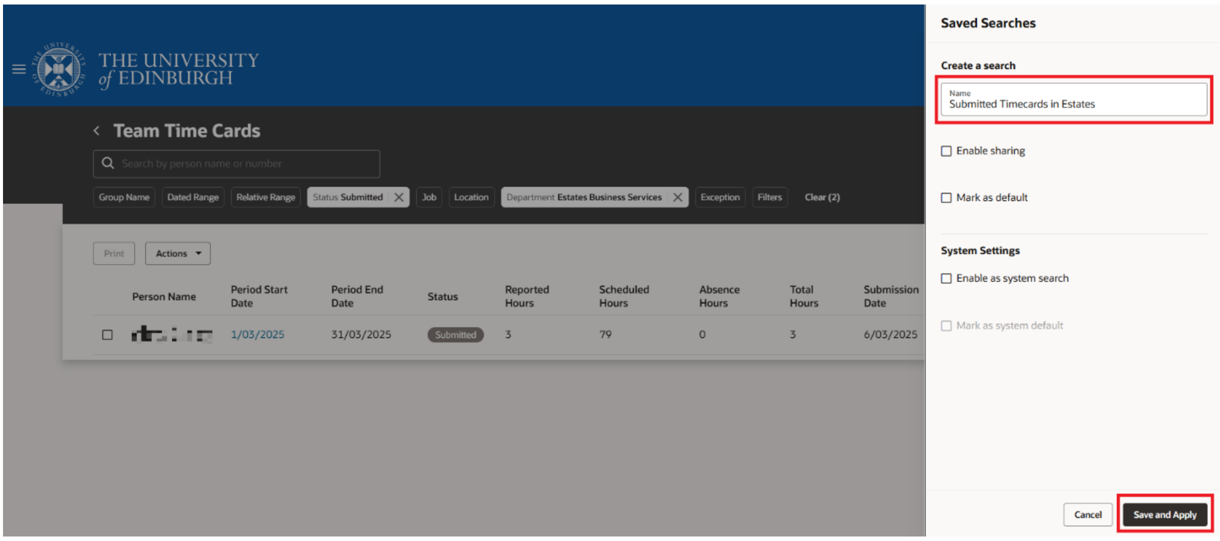
2. Click on the **bookmark icon** to set your current filters up as a saved search.



3. Click on **Create a Search**.



4. Give your search a name in the **Create a Search** field (it won't appear for anyone else, it's just yours). If you want to set the saved search to appear every time you go in to Team Time Cards, ensure that the **Mark as default** box is ticked. Click **Save and Apply**.

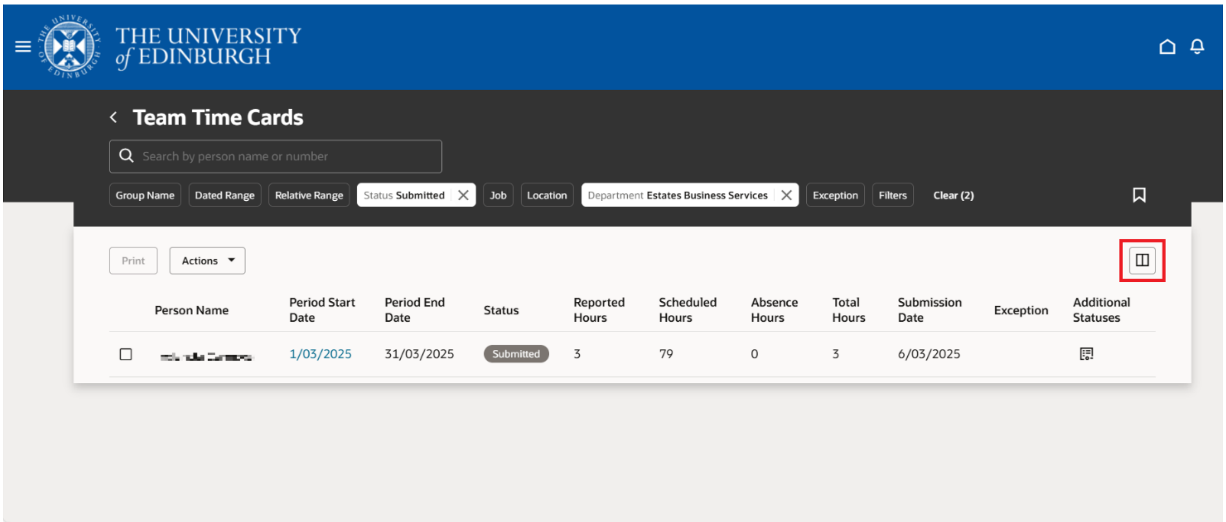


5. When you go back in to the bookmark icon, the search you have created will appear on the drop-down list under **Select Saved Search** so you can easily select this each time you visit this page (if you have not chosen to set it up as your default). You can also edit or delete the saved search by selecting it and clicking **Actions** and **Edit** or **Delete**.

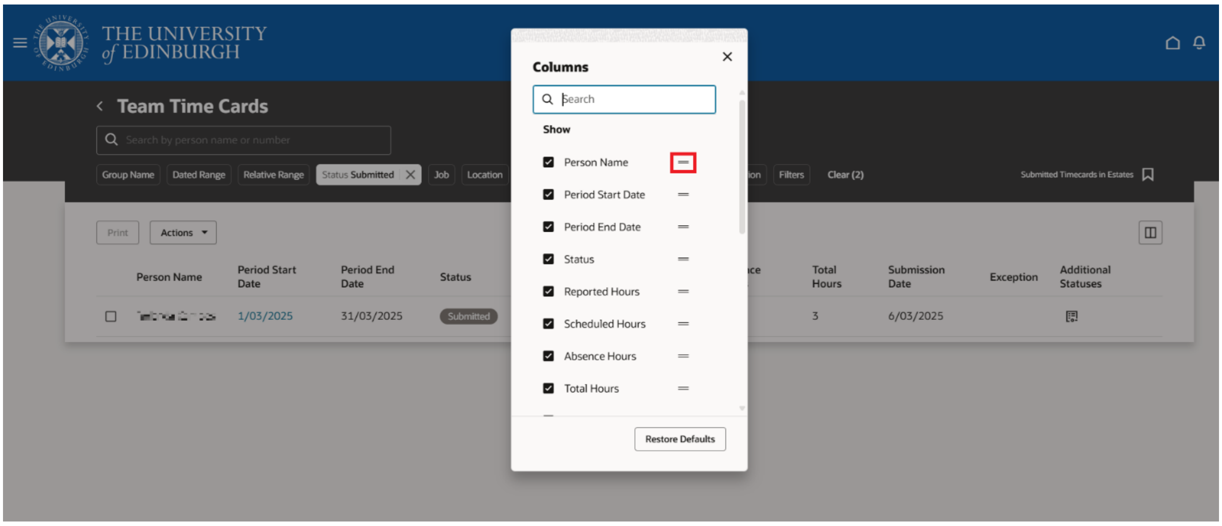
Note: Different filter views will appear depending on whether you access them as a manager or as a timekeeper (if you hold both of these roles).

How to change the order of columns in Team Time Cards screen

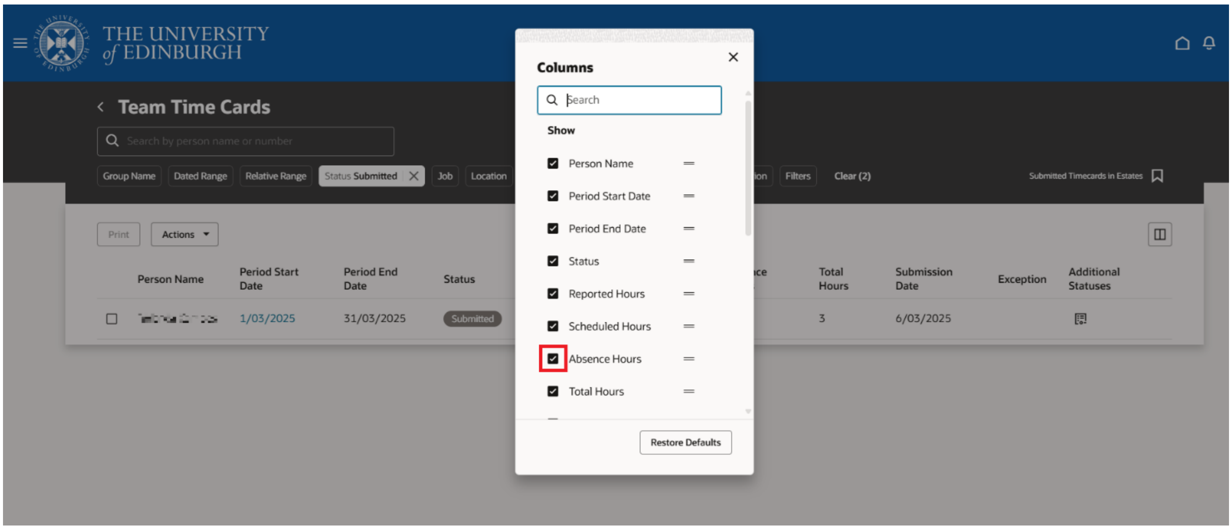
1. From the Team Time Cards app, click on the **Columns** icon.



2. Drag and drop each of the columns to suit your preference.



3. You can also choose to hide or unhide columns of your choice by ticking or unticking the box beside the column name.



4. Click on the close button to view your changes.

   Note: Making these changes are only temporary and will restore to default once you leave the Team Time Cards screen.

Version History

Version	Date	Description	Approved By
1.0	20/03/25	• Transferred guide to new template. • Added guidance on how to generate a Time Card on behalf of an employee (sections 2 & 3). • Replaced all screenshots to reflect the new look of the Redwood screens. • Added new section 'How to set up a saved search (filters in the Team Time Cards app)' (section 10). • Added new section 'How to change the order of columns in Team Time Cards screen' (section 11). • Added guidance on how to use the new Redwood screens.	M Easton – Head of HR Process Improvement

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.