

Time Supervisor Job Aid

UKG Workforce Management Timekeeping - Ready

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Key Dates:

September 17, 2022 – Organization wide, all employees begin to punch time in Ready.

October 7, 2022 – First payroll with time from the new system.

Key Contacts:

- **Payroll:** payroll@nsm-seating.com
- **Payroll Leads:** Leslie.Hargis@nsm-seating.com (423-756-2268 x0570) & Holly.Chandler@nsm-seating.com (423-756-2268 x0670)
- **HR:** HR@nsm-seating.com
- **HR Lead:** Katie.Xiong@nsm-seating.com or 423-355-8538
- **Regional HR Business Partners:** As always, please reach out to your regional HR Business Partner for assistance and guidance.

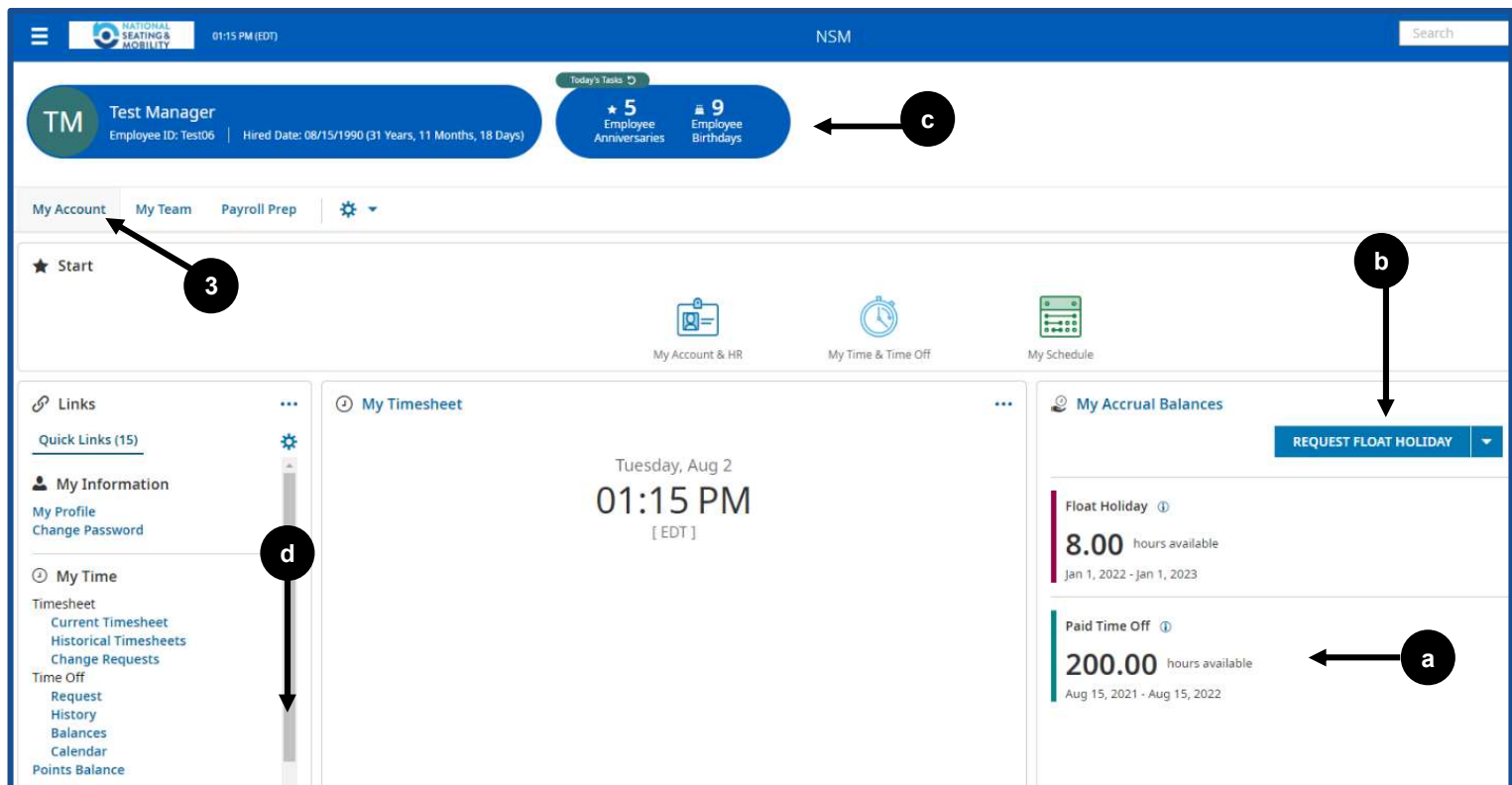
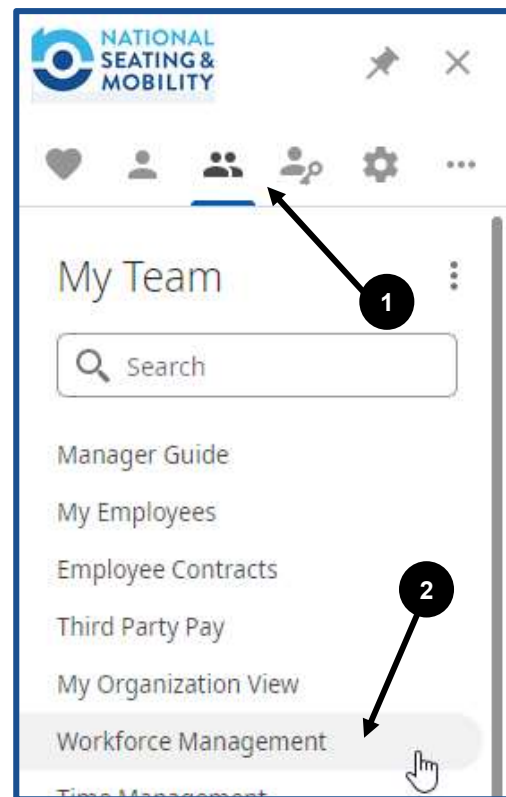
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Dashboard Navigation:

Step 1 & 2 – Navigate to **My Team** in UKG. Scroll down and click on **Workforce Management**.

Step 3 – From the main dashboard you will see a menu of options you can select from your own profile / **My Account**. From here you can view the following:

- a. View your PTO balance
- b. Submit a new PTO request
- c. View your employee's anniversaries and birthdays
- d. View reports you've saved.

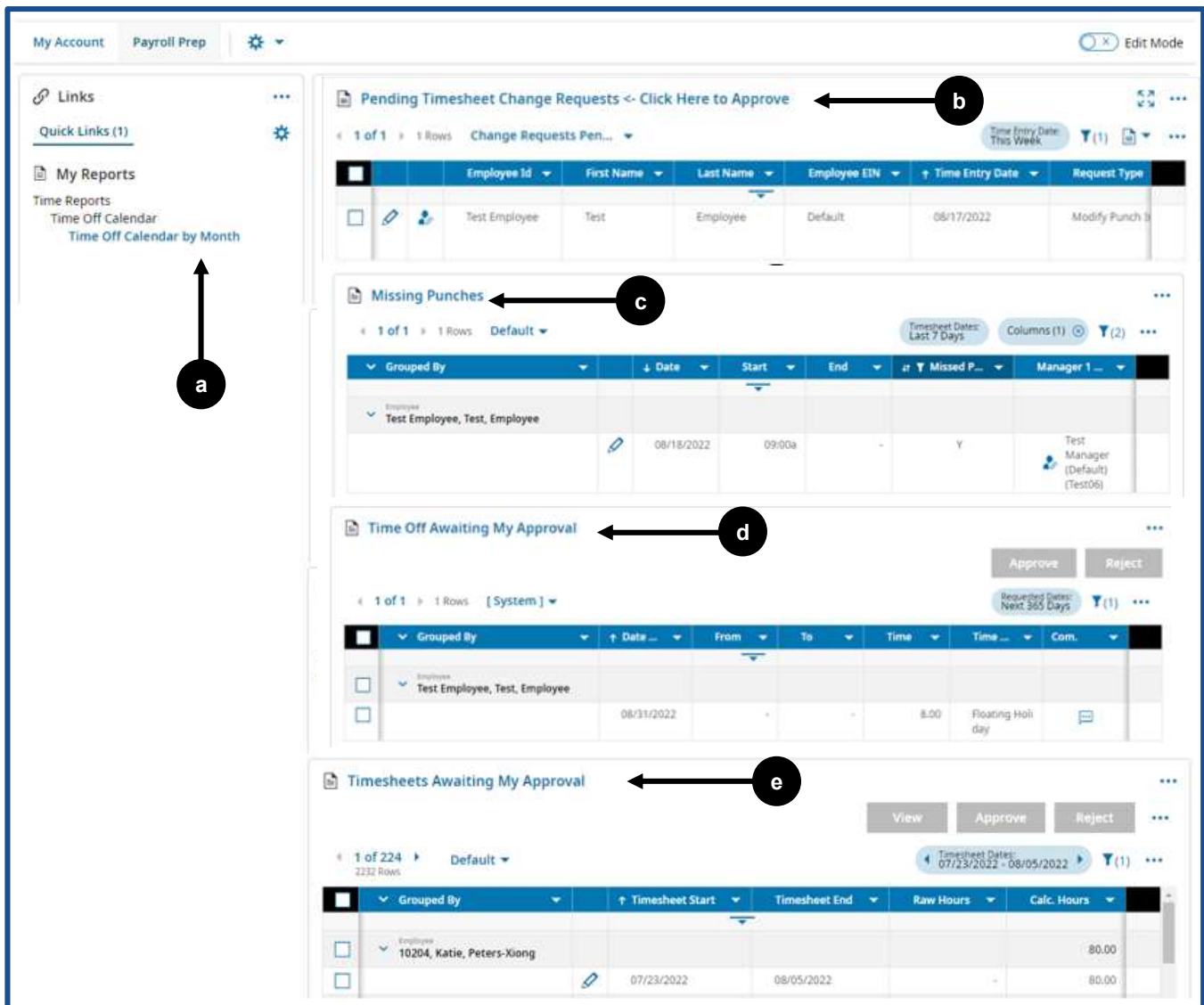
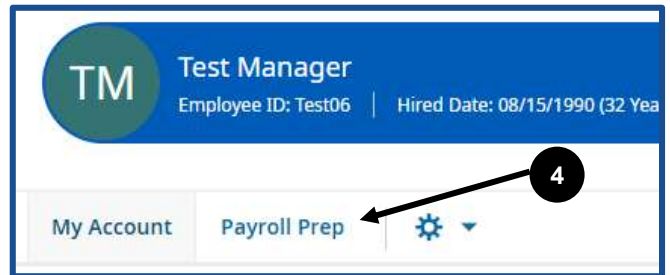


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Step 4 – Select **Payroll Prep** to switch to the page you will likely use most frequently. This is where you will come to complete all the payroll to-dos.

Step 5 – The **Payroll Prep** page has 5 major sections. We will walk through each section as we learn to make timecard edits, review time off requests, and approve timesheets.

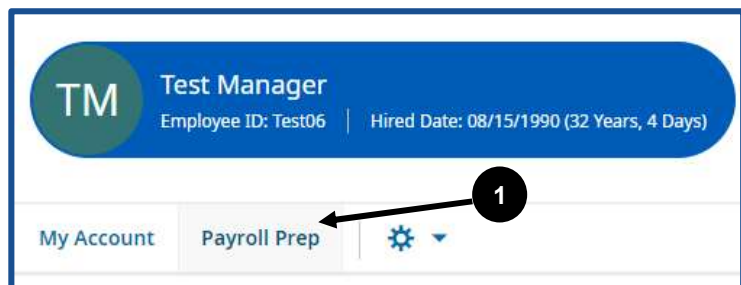
- Team Time Off Calendar
- Pending Timesheet Change Requests
- Missing Punches
- Time Off Awaiting My Approval
- Timesheets Awaiting My Approval



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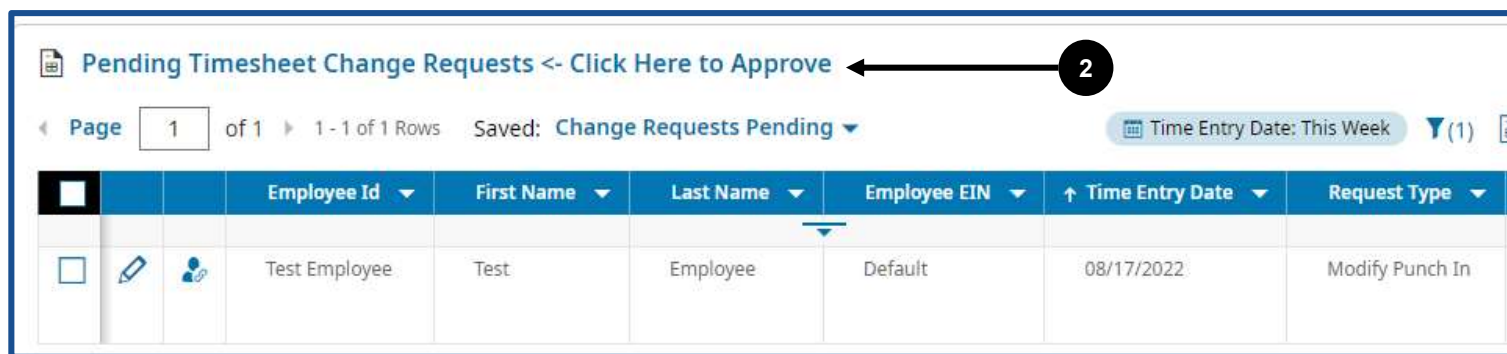
How to Edit Timecards – Approving a Timecard Change Request:

Step 1 – Navigate to [Payroll Prep](#).



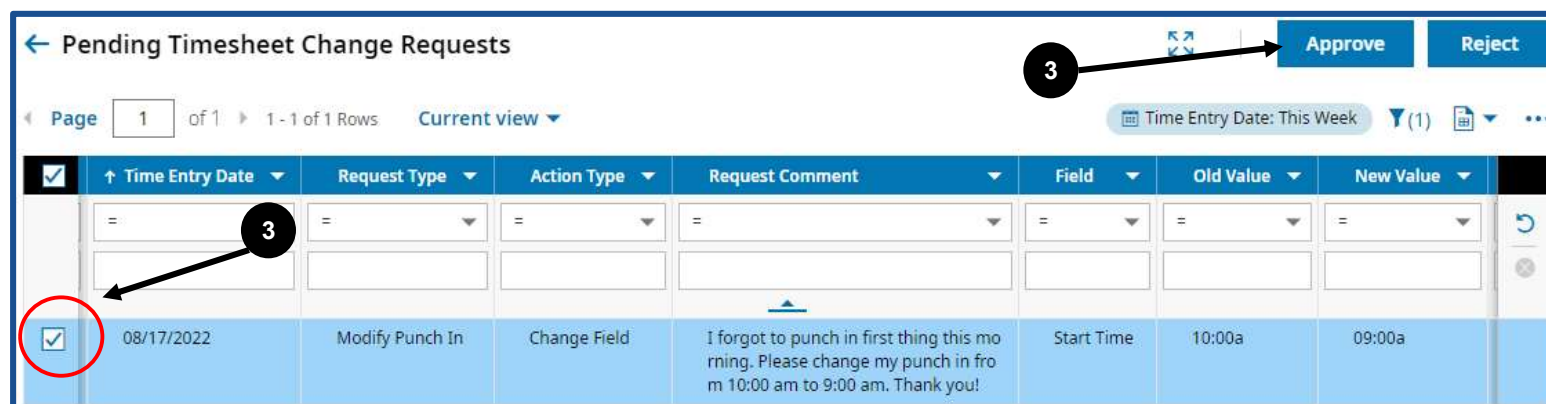
Section 3 – Scroll down to the third section, found in the middle of this page. This includes all [Pending Timesheet Change Requests](#) for the period.

Step 2 – Click the header [Pending Timesheet Change Requests](#) to open your list of pending change requests.



Step 3 – To approve the request, check off the change and then click [Approve](#).

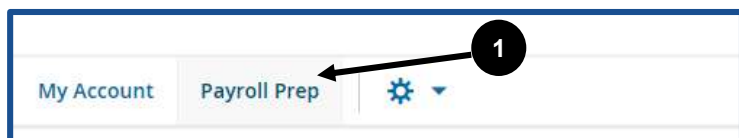
In this example, the employee is requesting to modify their punch in on 08/17/2022. The original punch (aka “Old Value”) is 10:00 am. The New Value is 9:00 am.



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How to Edit Timecards – Add a Missing Punch:

Step 1 – Navigate to **Payroll Prep**.

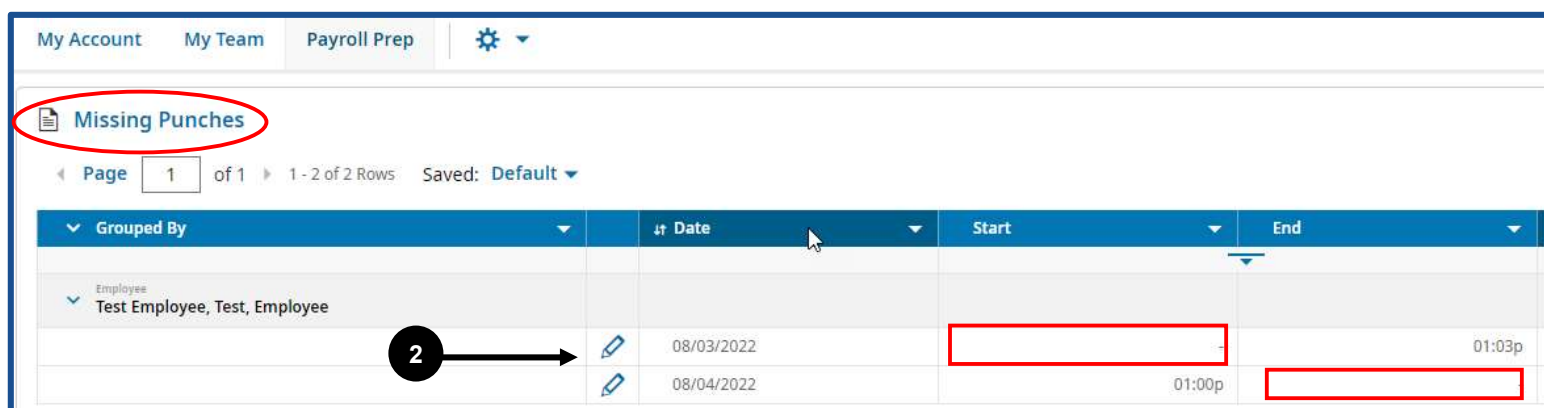


Section 2 – The second section, from the top of the **Payroll Prep** page, includes all **Missing Punches** for the time period.

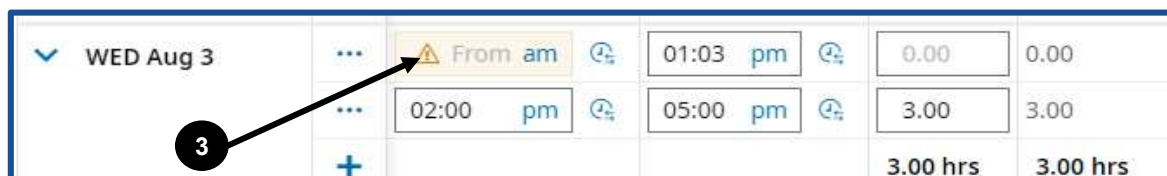
In the example below, Test Employee is missing a punch in/start on 08/03/2022 and a punch out/end on 08/04/2022.

Step 2 – To correct these missing punches, click the **pencil icon** to open the timecard.

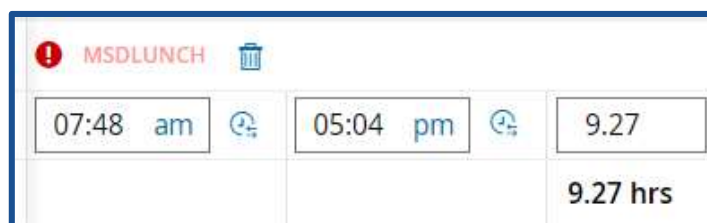
Note: You can filter and sort the columns at the top of the chart using the arrows. You can also change the timeframe by clicking on the calendar at the top of the chart.



Step 3 – Click in the cell with the missing punch, type in the correct time, and click **Save** at the top of the timecard. If you need to add a line, click the **plus button**.



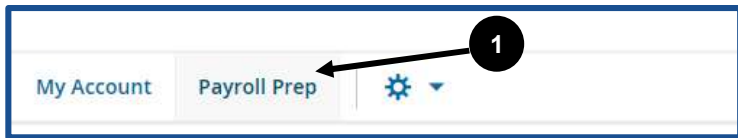
Note – Days with a missing lunch will be denoted on the timecard with a red **MSDLUNCH** and an **!**.



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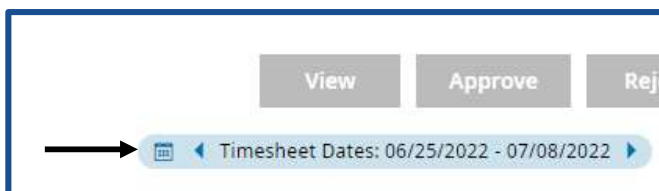
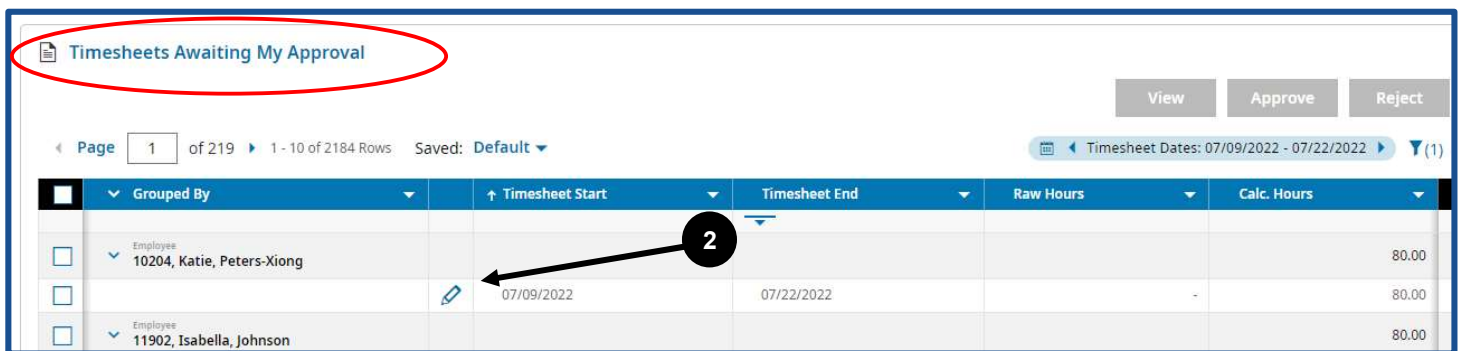
How to Edit Timecards – *Edit a Current Punch:*

Step 1 – Navigate to [Payroll Prep](#).



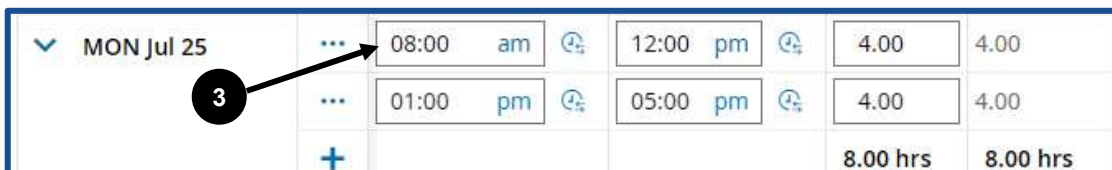
Section 4 – Scroll down to the fourth section, found at the bottom of this page. This includes all [Timesheets Awaiting Approval](#) for the period.

Step 2 – Click the [pencil icon](#) to open the employee timecard for edits.



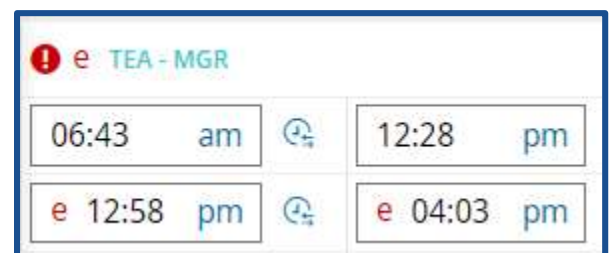
Note –You can change pay periods by click [Timesheet Dates](#) bubble at the top of the chart.

Step 3 – Once you are in the timecard, click in any cell to edit. Make sure to click [Save](#) when complete.



Note – Timecard edits are denoted by a red **e**. In addition, a note about the change and who made it will follow in blue.

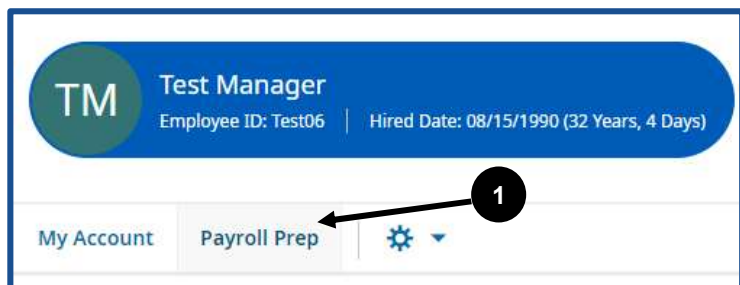
TEA – Time Entry Addition; **TED** – Time Entry Deletion;
TEE – Time Entry Edit



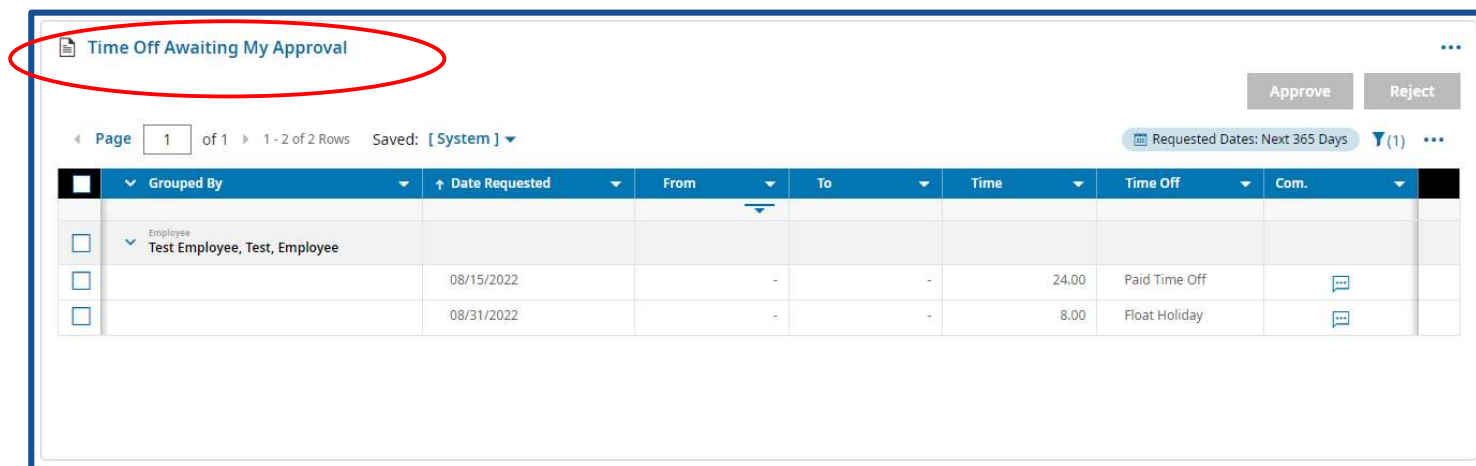
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Managing PTO Requests – Approving a Request:

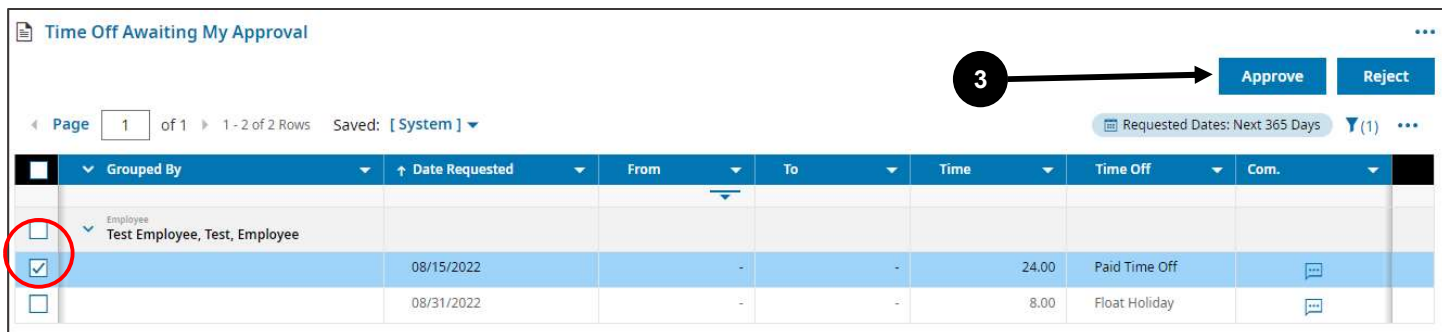
Step 1 – Navigate to **Payroll Prep**.



Step 2 / Section 2 – Scroll down to the second section, found in the middle of this page. This includes all **Time Off Awaiting My Approval** for the period.



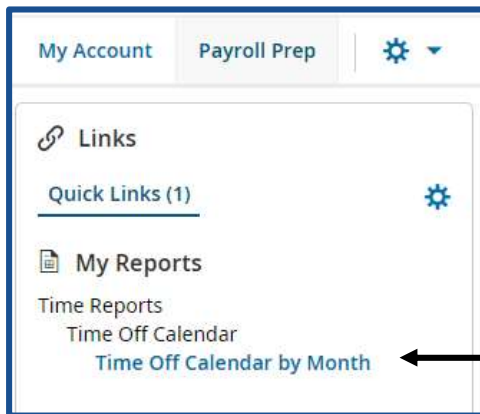
Step 3 – Check off the request(s) and click **Approve** or **Reject**.



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Managing PTO Requests – Approving a Request in the Team Calendar:

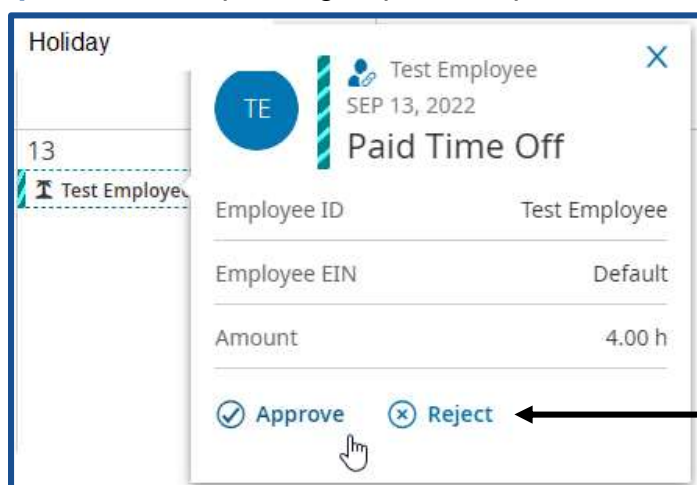
Step 1 – An alternate to approving time as shown on the previous page, is to approve time on the team calendar. From the **Payroll Prep** screen, click on **Time Off Calendar by Month**.



Holidays are indicated in red. Approved time off requests are solid green. Pending requests are white with a dashed border. You will see all team requests on this page. They will stack on top of one another as seen in the holiday example below.

5	6	7	
Test CAN - Salary Annual 8.00 h	Test Employee 8.00 h	Test Employee 8.00 h	Approved Request
Test CAN AB - Hourly 8.00 h			
Test CAN BC - Hourly 8.00 h			Holiday
12	13	14	
	Test Employee 4.00 h		Pending Approval

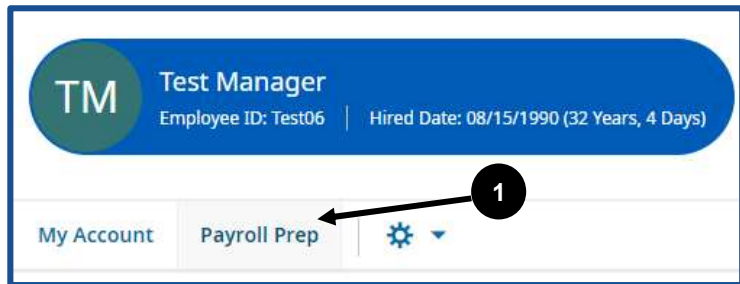
Step 2 – Click the pending request to open it. Next, select to **Approve** or **Reject** the request.



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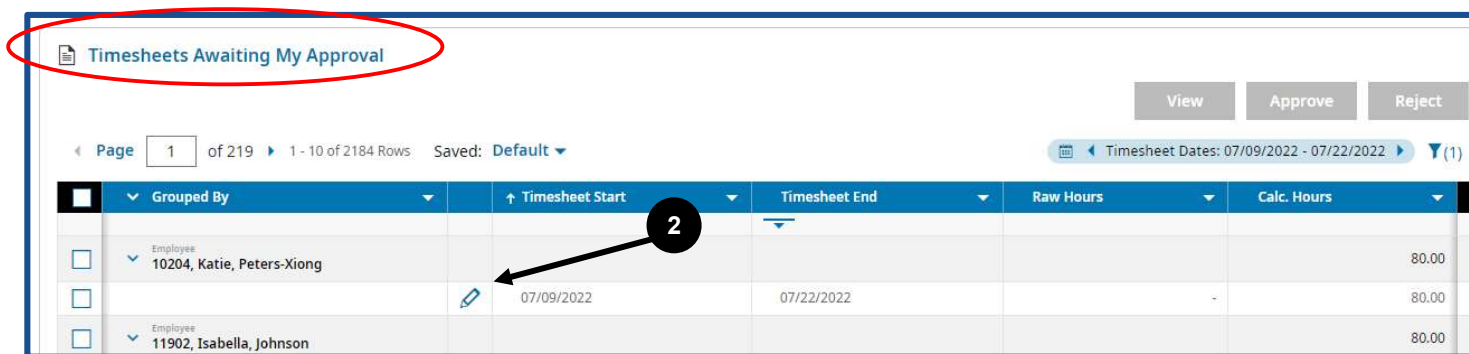
Managing PTO Requests – Adding PTO on Behalf of an Employee:

Step 1 – Navigate to [Payroll Prep](#).



Step 2 /Section 4 – Scroll down to the fourth section, found at the bottom of this page. This includes all [Timesheets Awaiting Approval](#) for the period.

Step 2 – Click the section header or [pencil icon](#) to open the employee timecard for edits.



Step 3 – From the employee's timecard, click the [plus sign](#) next to the date that needs the PTO added.

In the example below, PTO will be added on Monday, July 25th.

> Date		From	To	Raw Total	Calc. Total	In Date	Time Off
> SAT Jul 23	+			0.00 hrs	0.00 hrs		
> SUN Jul 24	+			0.00 hrs	0.00 hrs		
> MON Jul 25	+			0.00 hrs	0.00 hrs		
✓ TUE Jul 26	...	08:15 am	12:00 pm	3.75	3.75	TUE Jul 26	
	...	12:45 pm	05:00 pm	4.25	4.25	TUE Jul 26	
	+			8.00 hrs	8.00 hrs		

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Step 4 – Select the drop down under the **Time Off** column and click **Browse**.



The screenshot shows the UKG Ready interface with a table for time off requests. The table has columns: Date, From, To, Raw Total, Calc. Total, In Date, and Time Off. The 'Time Off' column is circled in red, and a dropdown menu is open below it, showing the 'Browse...' option. A black circle with the number 4 points to the dropdown menu.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off
SAT Jul 23			0.00 hrs	0.00 hrs		
SUN Jul 24			0.00 hrs	0.00 hrs		
MON Jul 25	From am	To am	0.00	0.00	MON Jul 25	Browse...

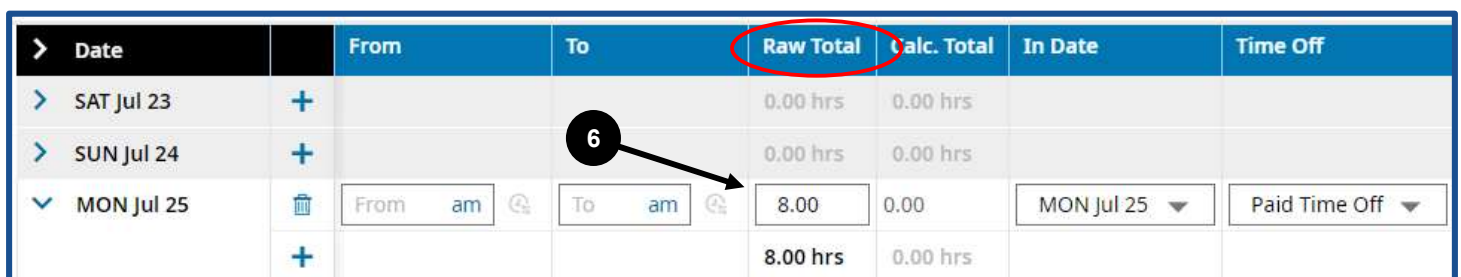
Step 5 – Select the correct type of time off from the list.



The screenshot shows a list of time off types. The 'Paid Time Off' option is selected, indicated by a blue highlight and a hand cursor. A black circle with the number 5 points to the 'Paid Time Off' option.

Name	Full Path
<input type="radio"/> Bereavement	Bereavement
<input type="radio"/> Float Holiday	Float Holiday
<input type="radio"/> Holiday	Holiday
<input type="radio"/> Jury Duty	Jury Duty
<input checked="" type="radio"/> Paid Time Off	Paid Time Off
<input type="radio"/> Time Off No Pay	Time Off No Pay

Step 6 – Enter the number of hours in the **Raw Total** column. Make sure to click **Save** when you are done.



The screenshot shows the UKG Ready interface with the 'Raw Total' column circled in red. The value '8.00' is entered in the 'Raw Total' column for the date 'MON Jul 25'. A black circle with the number 6 points to the 'Raw Total' column.

Date	From	To	Raw Total	Calc. Total	In Date	Time Off
SAT Jul 23			0.00 hrs	0.00 hrs		
SUN Jul 24			0.00 hrs	0.00 hrs		
MON Jul 25	From am	To am	8.00	0.00	MON Jul 25	Paid Time Off

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Managing PTO Requests – PTO Bank Availability:

Step 1 – Navigate to an employee's timecard.

Step 2 – From the top, right-hand side of the page, you will see **three dots**. Click these dots to open a drop-down menu of additional options.

Top of the list, you will find **Time off Counts**. Click here to open a chart of the employee's PTO availability.

Time > Timesheets

← Timesheet Edit

September 03, 2022 - September 16, 2022

28.00 hrs Regular, 0.00 hrs Overtime, 4.00 hrs PTO, 8.00 hrs Holiday

Time Off Counts

- Points
- Schedule
- Edit Schedule
- Timesheet Audit Trail
- Exception Entries Audit Trail
- Reprocess Punches

Step 3 – In this example, the employee's record shows the following:

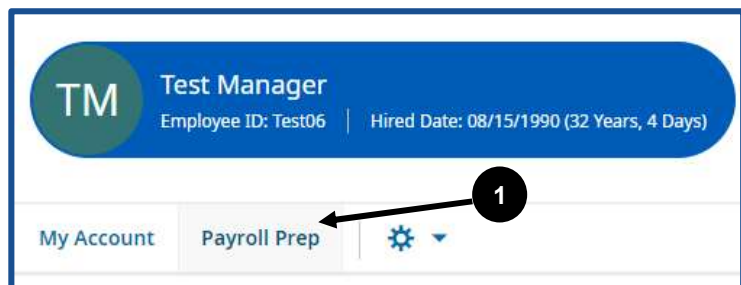
- Accrued 160 hours.
- Taken 4 hours.
- Current balance is 156 hours.
- Accrues 5.85 per pay period.

Time Off Counts						
Page 1 of 1 1 - 2 of 2 Rows View By: Hours						
Type	Accrued To	Current Accrued	Taken	Current Balance	Scheduled	Current Accrue Rate
Floating Holiday	01/01/2023	8.00	8.00	0.00	0.00	8/Yearly
Accrual Year 01/01/2022 - 01/01/2023						
Paid Time Off	09/17/2022	160.00	4.00	156.00	0.00	5.85 Hrs/Pay Period
Accrual Year 08/08/2022 - 08/08/2023						

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Approving Timecards:

Step 1 – Navigate to [Payroll Prep](#).



Step 2 / Section 4 – Scroll down to the fourth section, found at the bottom of this page. This includes all [Timesheets Awaiting My Approval](#) for the period.

The screenshot shows the 'Timesheets Awaiting My Approval' section. The section header is circled in red. Below the header, there is a table with columns: Grouped By, Timesheet Start, Timesheet End, Raw Hours, and Calc. Hours. The table contains three rows of data for employees 10204, 11902, and 11158. The 'Raw Hours' column shows 80.00 for each row, and the 'Calc. Hours' column shows 80.00 for each row. The table is filtered for the period 08/06/2022 - 08/19/2022.

Grouped By	Timesheet Start	Timesheet End	Raw Hours	Calc. Hours
Employee 10204, Katie, Peters-Xiong	08/06/2022	08/19/2022	80.00	80.00
Employee 11902, Isabella, Johnson	08/06/2022	08/19/2022	80.00	80.00
Employee 11158, Leslie, Hargis	08/06/2022	08/19/2022	80.00	80.00

Step 3 – Check off the timecards to review. Click to [View](#), [Approve](#), or [Reject](#), as appropriate.

Click on the section header or [pencil icon](#) to open the timecard for additional edits.

The screenshot shows the 'Timesheets Awaiting My Approval' section. The section header is circled in red. Below the header, there is a table with columns: Grouped By, Timesheet Start, Timesheet End, Raw Hours, and Calc. Hours. The table contains three rows of data for employees 10204, 11902, and 11158. The 'Raw Hours' column shows 80.00 for each row, and the 'Calc. Hours' column shows 80.00 for each row. The table is filtered for the period 08/06/2022 - 08/19/2022. A red circle highlights the 'View' button for the first row, and a red arrow points to it from a red circle containing the number '3'.

Grouped By	Timesheet Start	Timesheet End	Raw Hours	Calc. Hours
Employee 10204, Katie, Peters-Xiong	08/06/2022	08/19/2022	80.00	80.00
Employee 11902, Isabella, Johnson	08/06/2022	08/19/2022	80.00	80.00
Employee 11158, Leslie, Hargis	08/06/2022	08/19/2022	80.00	80.00

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Using Notes & Activity Codes:

Step 1 - From the employee's timecard, click on the [message bubble icon](#) to add a note.

> Date		From	To	Raw Total	Calc. Total	In Date	Time Off	Org Level 1	Activity/Overrides	Points	Notes
> SAT Aug 6	+			0.00 hrs	0.00 hrs						
> SUN Aug 7	+			0.00 hrs	0.00 hrs						
v MON Aug 8	...	06:00 am	08:00 am	2.00	2.00	MON Aug 8		Choose...	Choose...	0	
	...	08:30 am	11:11 am	2.68	2.68	MON Aug 8		Choose...	Choose...	0	
	+			4.68 hrs	4.68 hrs						

Step 2 - Add comments/notes and click [Save](#). You'll then see a red dot next to dates with notes.

MON Aug 8

Daily Notes

No notes to display

Add Note *

Employee left early. Not feeling well. Unplanned half day absence.

Clear

Cancel

Save

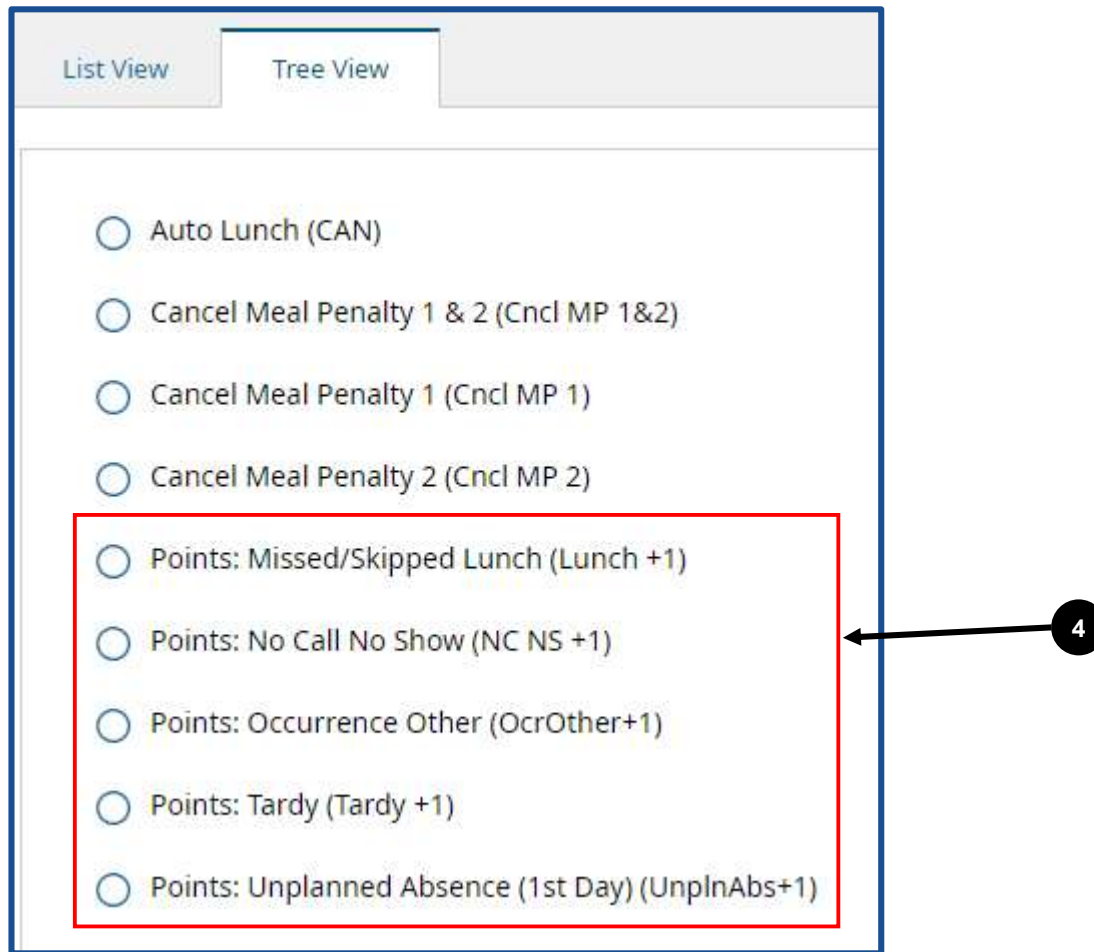


Step 3 – To add a reason code and attendance points, click the [browse icon](#) under [Activity/Overrides](#) column.

In Date	Time Off	Org Level 1	Activity/Overrides	Points	Notes
MON Aug 8		Choose...	Choose...	0	
MON Aug 8		Choose...	Choose...	0	

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Step 4 – Select the reason code/points exception from the list.

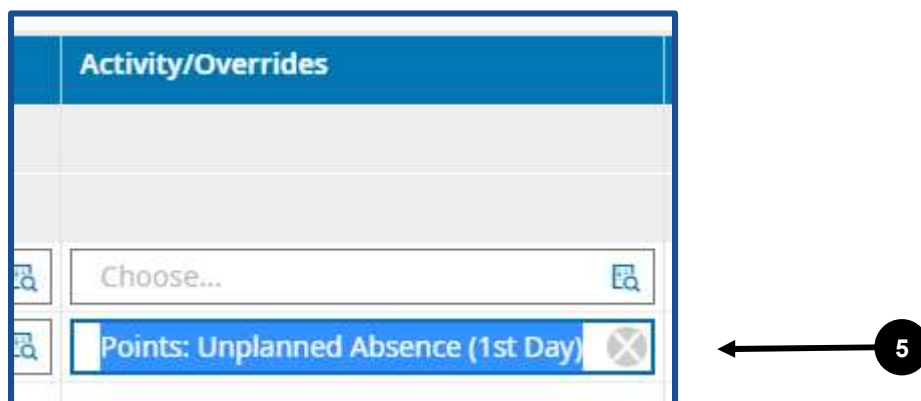


The screenshot shows a web interface with two tabs: 'List View' and 'Tree View'. Below the tabs is a list of radio button options. A red rectangular box highlights the following options:

- ☐ Auto Lunch (CAN)
- ☐ Cancel Meal Penalty 1 & 2 (Cncl MP 1&2)
- ☐ Cancel Meal Penalty 1 (Cncl MP 1)
- ☐ Cancel Meal Penalty 2 (Cncl MP 2)
- ☐ Points: Missed/Skipped Lunch (Lunch +1)
- ☐ Points: No Call No Show (NC NS +1)
- ☐ Points: Occurrence Other (OcrOther+1)
- ☐ Points: Tardy (Tardy +1)
- ☐ Points: Unplanned Absence (1st Day) (UnplnAbs+1)

An arrow points from a circled number '4' to the 'Points: Missed/Skipped Lunch (Lunch +1)' option.

Step 5 – The activity code/point will now appear under the **Activities/Overrides** column.



The screenshot shows a table with a header 'Activity/Overrides'. Below the header, there is a search bar with the text 'Choose...'. Below the search bar, the 'Points: Unplanned Absence (1st Day)' option is selected and highlighted in blue. An arrow points from a circled number '5' to this selected option.

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Additional Notes On Attendance Points System:

According to our HR Manual, five or more occurrences within a 90-day time frame is considered excessive and can result in disciplinary action. Remember, an occurrence is an *unplanned* absence, late arrival or early departure. We do not decipher whether an absence is excused or unexcused. The absence was simply planned in advance, or it was unexpected and unplanned, and is therefore an occurrence.

Examples of occurrences:

- Employee arrives late/tardy
- Employee departs early.
- Employee takes extended lunch or breaks.
- Employee calls out for an unplanned full day out.

Examples of absences that are not occurrences:

- Planned vacation days.
- Planned late arrivals or early departures for flex schedules, appointments, etc.
- Any absence or tardy covered under FMLA, ADAAA, or Workers' Compensation.

UKG can track occurrences using points as described on the previous page -

Each occurrence that is recorded as a point on the timesheet will equal a point in the timekeeping system for reporting purposes.

If an Activity Point is not added by the manager, the system will not recognize an occurrence or record a point.

Reminder – Consecutive days missed for the same illness would only count for 1 occurrence/point. For example, an employee who is out 3 days for the flu should only have one Activity/Attendance Point. The point can be assigned to the first day missed. We would not hold the other two days against the employee.

Note – There is nothing automated in the system connected to Activity/Attendance Points. HR does not track these unless you request a report. A write-up will not automatically be triggered by the points. The points are simply a tool that managers can use for reference to help track excessive attendance policy related occurrences and violations.

Please consult your HR Business Partner or the HR Manual for additional details.