THE UNIVERSITY of EDINBURGH

System User Guide

# Timekeeper - Guide to Time Cards

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

## Contents






PM2013
25B V2.0 May 2025

## Introduction

This guide covers key tasks in the 'How to Manage Time Cards' 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 includes further detail on the business process around Time Cards including glossary terms and an explanation of roles involved in the process.

The Timekeeper role has been created to allow administrators to monitor and intervene in the Time Card process if and when necessary. It is not mandatory for Timekeepers to be involved but they may wish to be to ensure data quality and completeness.

Time Cards 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.

## Viewing approved/submitted 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 from being paid as expected.

## Editing a Time Card

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). Please note, the system will not prevent you from editing in this period, therefore please take care. **This means employees, line managers and timekeeper must not edit 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.

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

## Generating a Time Card on Behalf of an Employee

Timekeepers have access to input Time Cards for employees. It is only possible for a Timekeeper to enter one Time Card at a time; there is no bulk load functionality. All employees have access to input Time Cards via self-service and should be encouraged to do so.

If a Time Card is rejected by the Line Manager, the employee or timekeeper will be able to amend this and resubmit before the 10th of the month, without starting the entire process again.

Timekeepers can 'save' a Time Card throughout the month and submit once all time has been entered and by the last day of the month. Alternatively, it can be saved (rather than submitting) if you wish to input time throughout the month. Managers receive emails or in-system notifications to approve a Time Card that has been submitted by an employee. However, they do not receive emails or in-system notifications to approve a Time Card that has been submitted by a Timekeeper.

An employee can save a Time Card (instead of submitting) to allow timekeepers to review, edit and submit on their behalf. If a school/department would like their employees to do this, they will need to communicate this to ensure employees know before submitting any Time Cards. Likewise, a timekeeper can enter and save a Time Card to allow someone else (another timekeeper) to double check before it is resubmitted and flows through the process to payroll.

It is not possible to submit a Time Card with a negative number of hours on it. If you need to do this because an employee has previously submitted too many hours and they have been overpaid, you will need to go back to the month which had the overpayment and edit this to reflect the correct amount.

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

# 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 Client Groups** tab, click **Show More** at the bottom of the Quick Actions.
2. Under the **Time** section, choose from **Add Current Time Card**, **Add Other Time Card** or **Team Time Cards**.

3. For Team Time Cards: click the Add button (+).
4. Search for the employee you wish to add a Time Card for or select one of your direct reports (if you have any).
5. For Add Current Time Card: The Time Card for the current month will appear.
6. For Add Other Time Card and Team Time Cards: Click **Add** to create a time entry. Enter the start date of the Time Card and click Add.
7. Complete the relevant fields and click the **Save** button if you have more hours to input for that month, or the **ellipsis button** (3 dots) then **Submit** if you have entered all of the relevant hours for the employee.

### How to resubmit an employee's Time Card to pass it on to Payroll

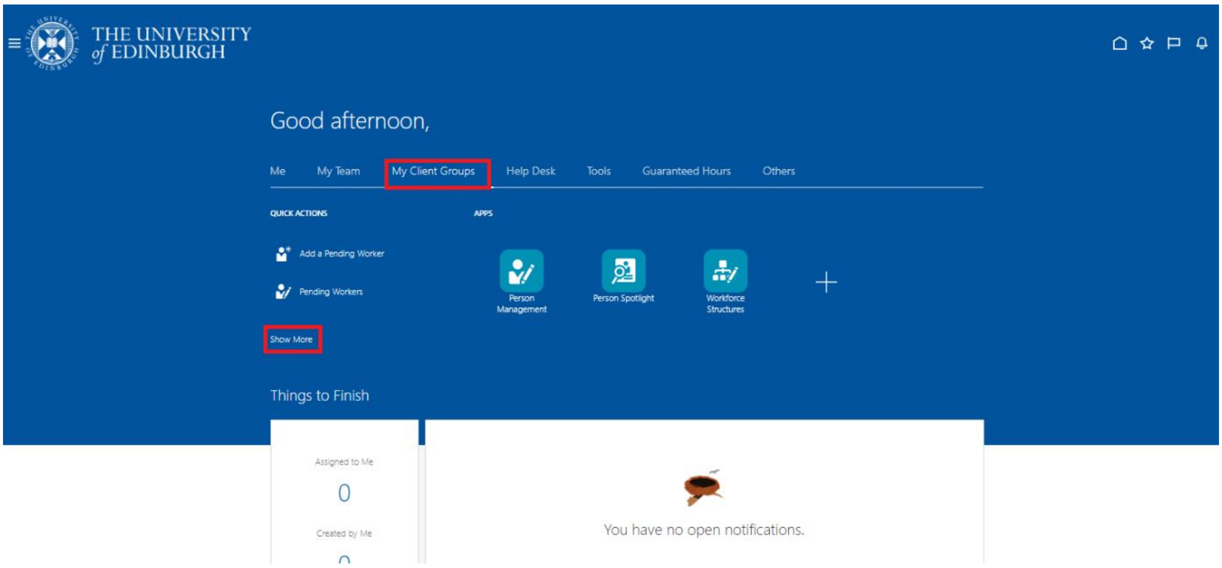
1. From the Homepage, under the **My Client Groups** tab, click **Show More** at the bottom of the Quick Actions
2. Under the **Time** section, click **Team Time Cards**
3. Remove the default **Date Range** filter (two weeks).
4. Click on the **Relative Range** filter and select period.
5. Search for employee or select from list.
6. Click on the **blue text** next to the employee's name to open the Time Card.
7. Check the dates of the Time Card are for the correct period.
8. Click on the **ellipsis button** (3 dots) then **Submit**.
9. If you want to edit the Time Card, amend the relevant fields.
10. If you want to reject it, add a comment and click on **the ellipsis button** (3 dots) and **Save and Close.** Contact the employee to let them know that they need to correct the Time Card as per your comments, as the system will not notify them.

## 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 Client Groups** 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 three 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.
    3. **Team Time Cards** - 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.

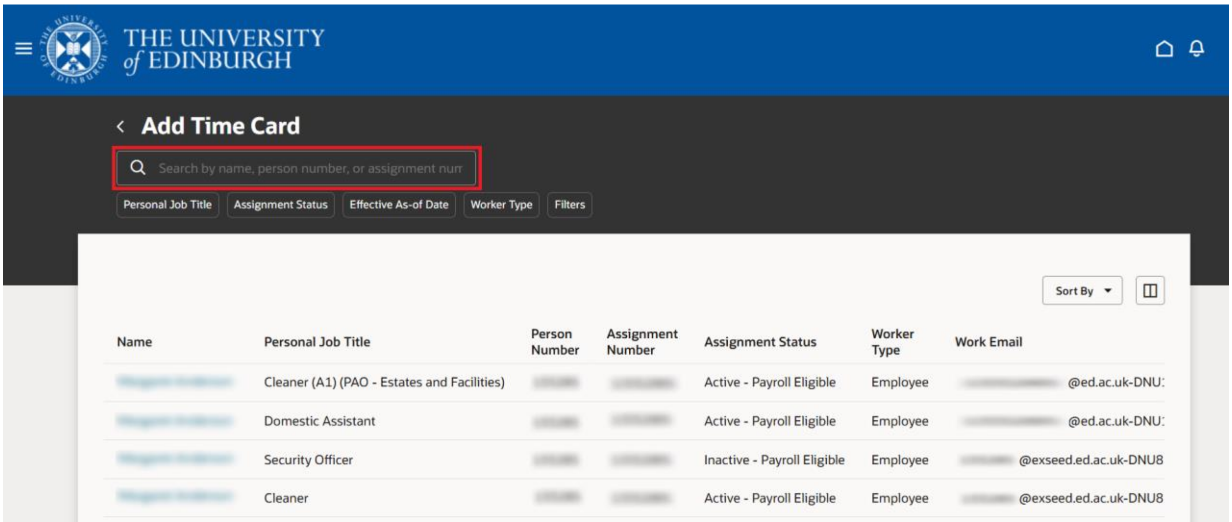
## Via Add Current Time Card

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

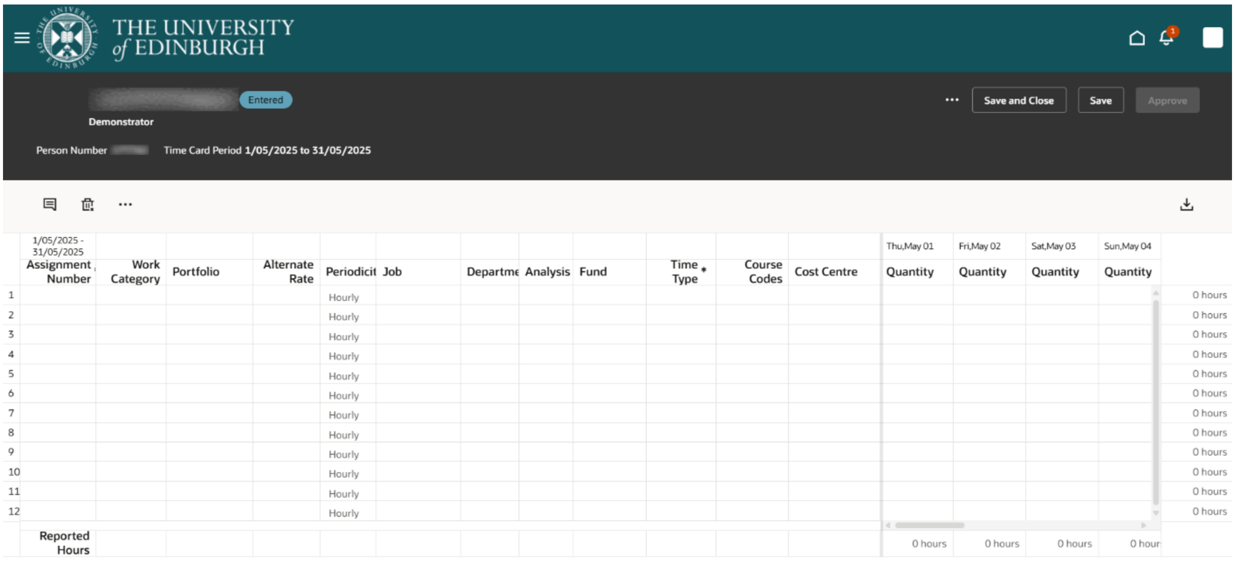
4. Click on the **Assignment Status** filter under the search bar and select **Active – Payroll Eligible** (**do not** select Inactive – Payroll Eligible as you cannot add a Time Card for an inactive employee).

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 Personal Job Title or Worker type – Employee (**do not** use Contingent Worker, Pending Worker to Non-Worker).

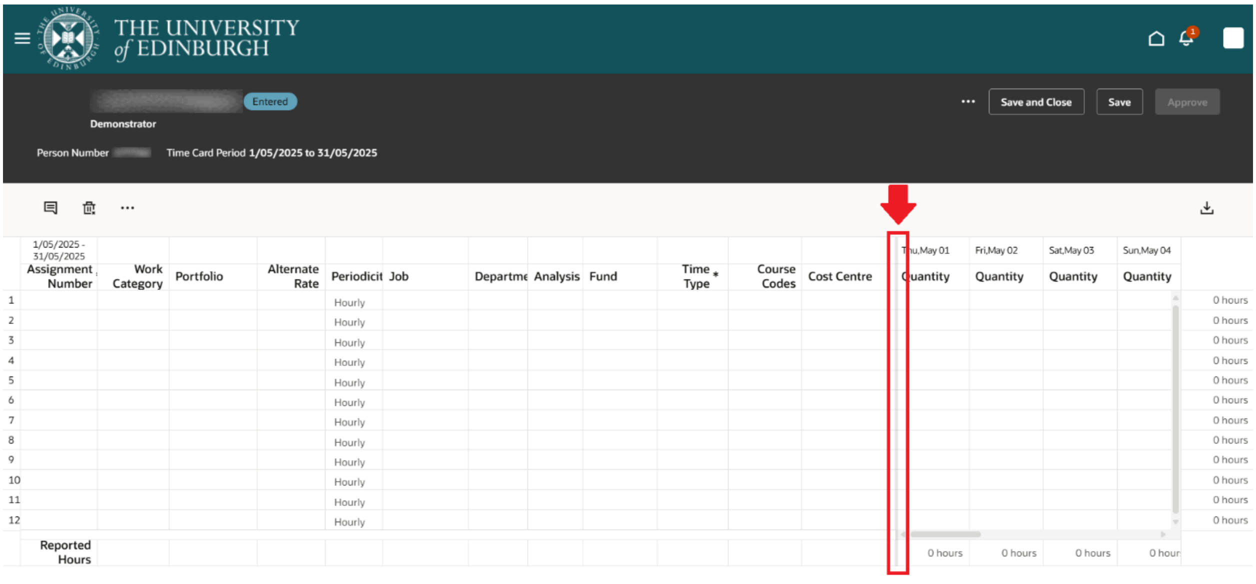



6. The Time Card for the current month will be displayed.




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:

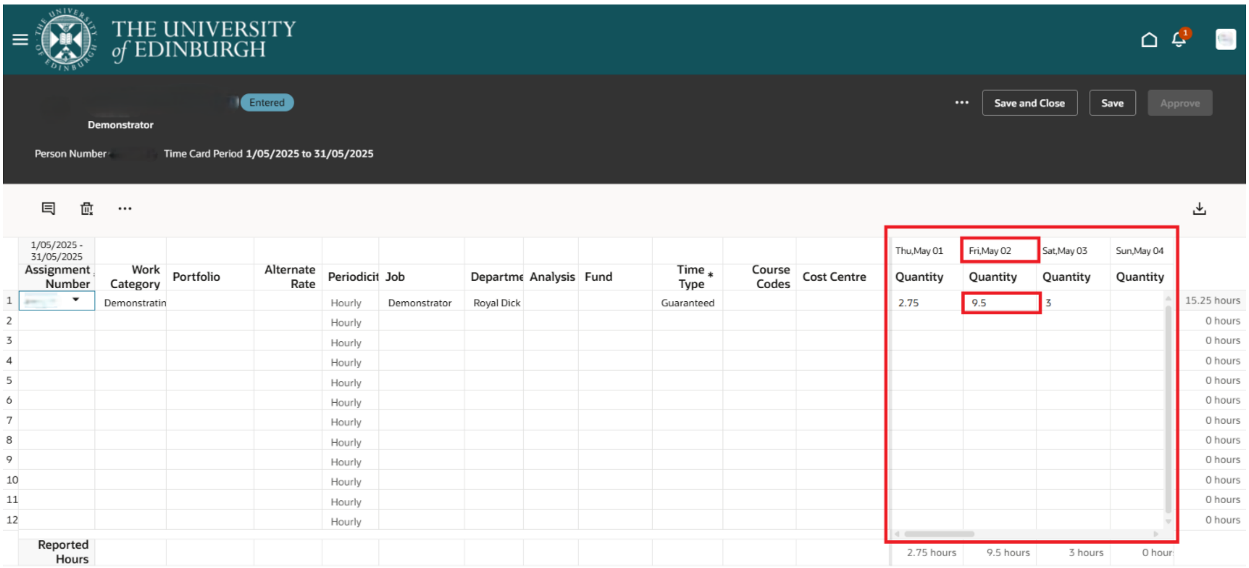
- Additional Hours
- Call Out
- Guaranteed Hours
- Intern Hours
- Overtime x0.5
- Overtime x1
- Overtime x1.2
- Overtime x1.5
- Overtime x2
- Premium Band Overtime
- Union Duties

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.

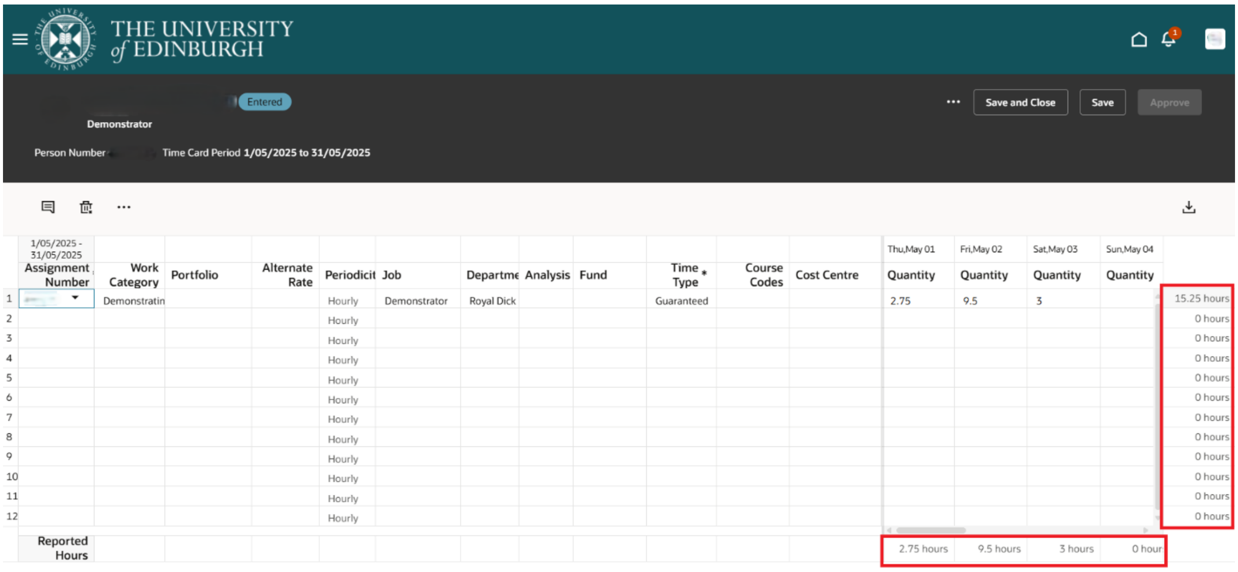
**Course Codes** – Optional field that contains a searchable list of values that refer to specific academic courses. This will only be applicable to academic positions. If the work the employee has done was in relation to a specific course, please complete this wherever possible.

**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.

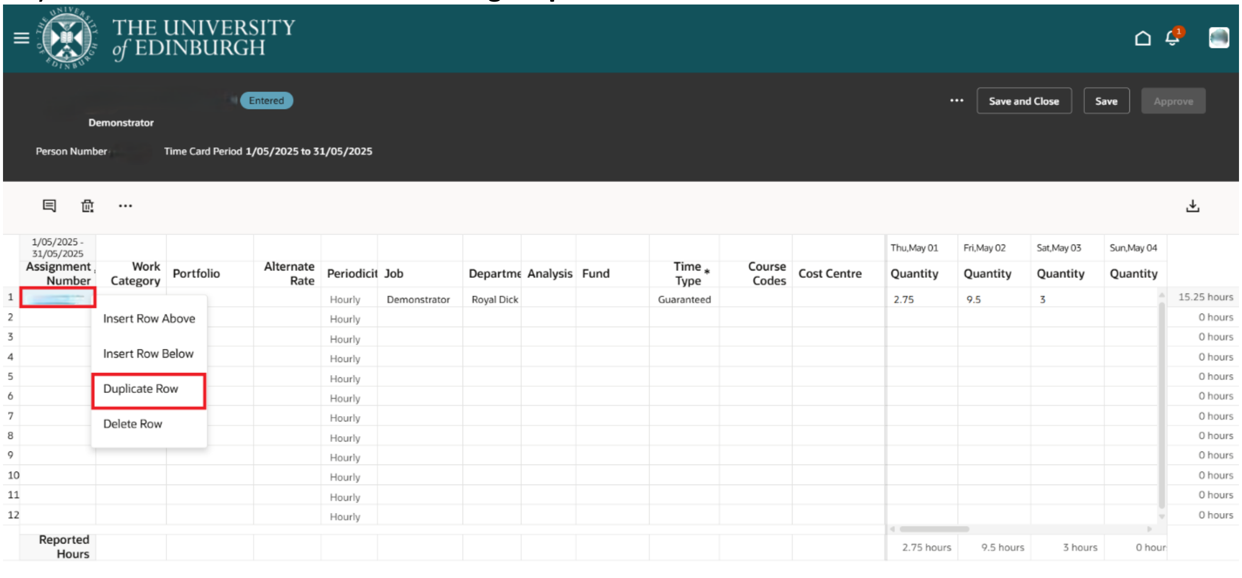
**Quantity** – The days of the month are shown on the right-hand side of the Time Card. If you cannot see the days of the month, please reduce the column sizes and the Zoom percentage of your browser. For each specific day the employee has worked, enter the number of hours on the Time Card, using the 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.

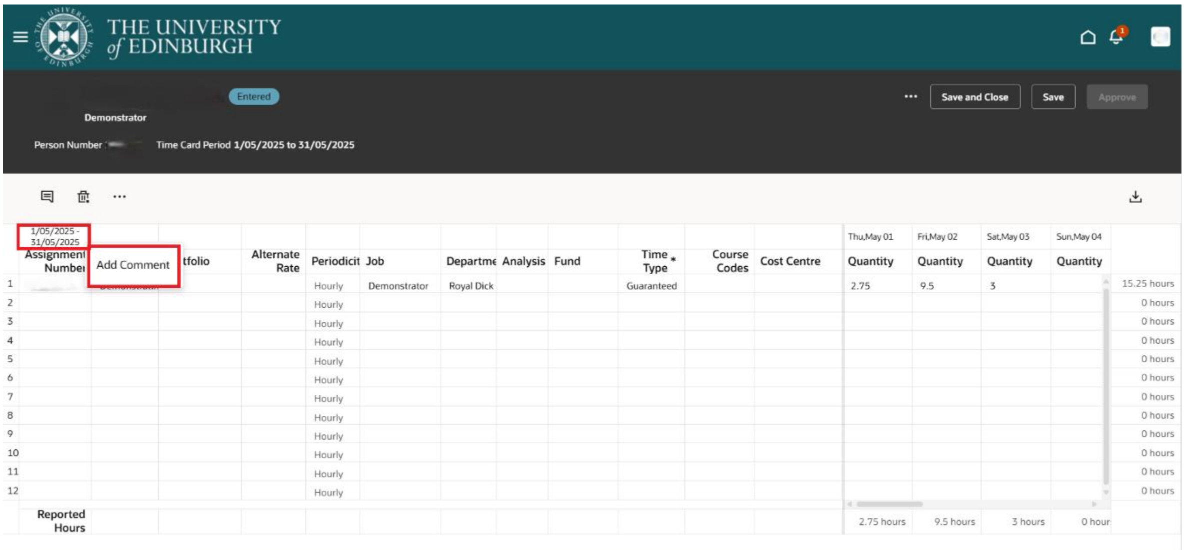


9. If the employee holds multiple assignments, move down to the next row and repeat step 6. Alternatively, you can copy the information you have just entered in row 1 by right clicking on any of the fields in row 1 and selecting **Duplicate Row**.

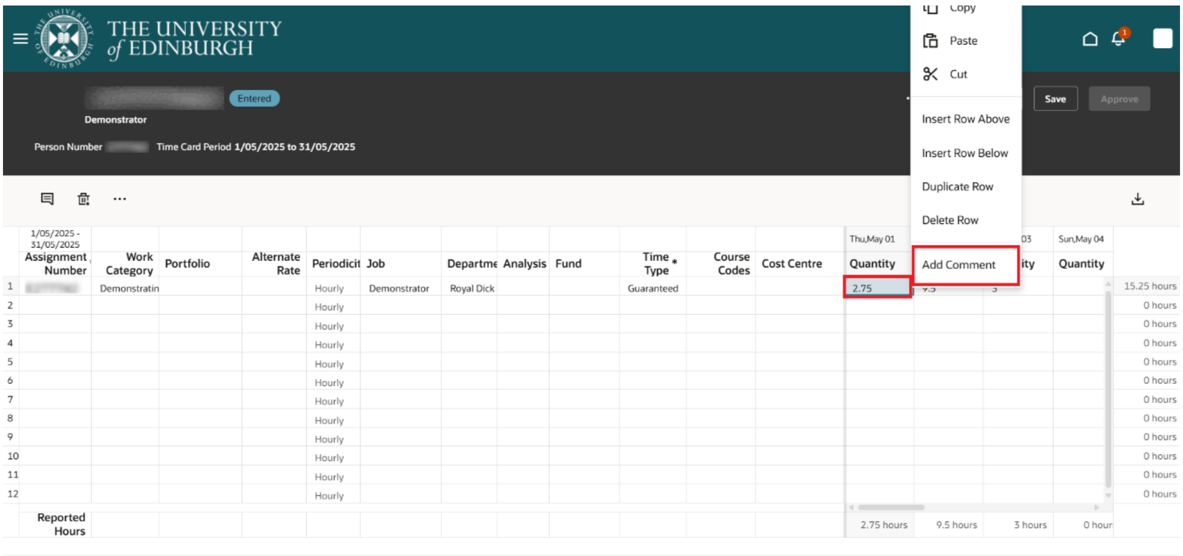



Similarly, if some of the hours need to be charged to a specific course code, costing codes or a different time type these can be recorded on the row(s) below (e.g. if you have worked 5 hours of overtime, you would record the first 2 hours in row 1 using the Time Type 'Overtime 1.0' and the remaining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

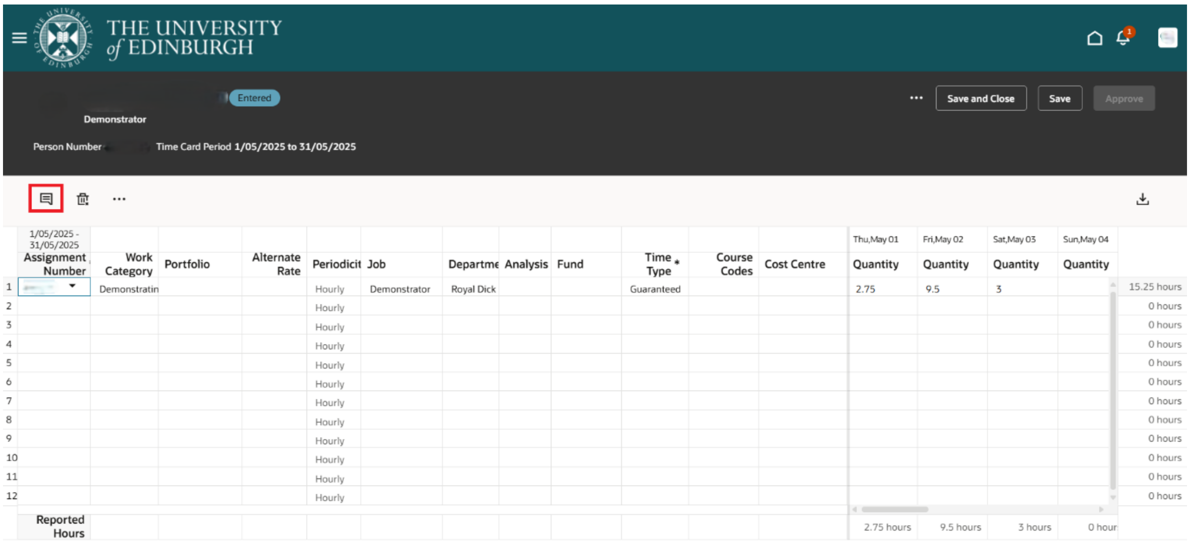
10. Comments can either be added to the overall Time Card or for a specific day within the Time Card:
    a) To add a comment to the overall Time Card, right click on the time period dates field and select **Add Comment**. Click **Save**.




    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 on the **ellipsis button** (3 dots) and **Submit** in the top right-hand corner (Note: the Approve button is greyed out).

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

## Via Add Other Time Card

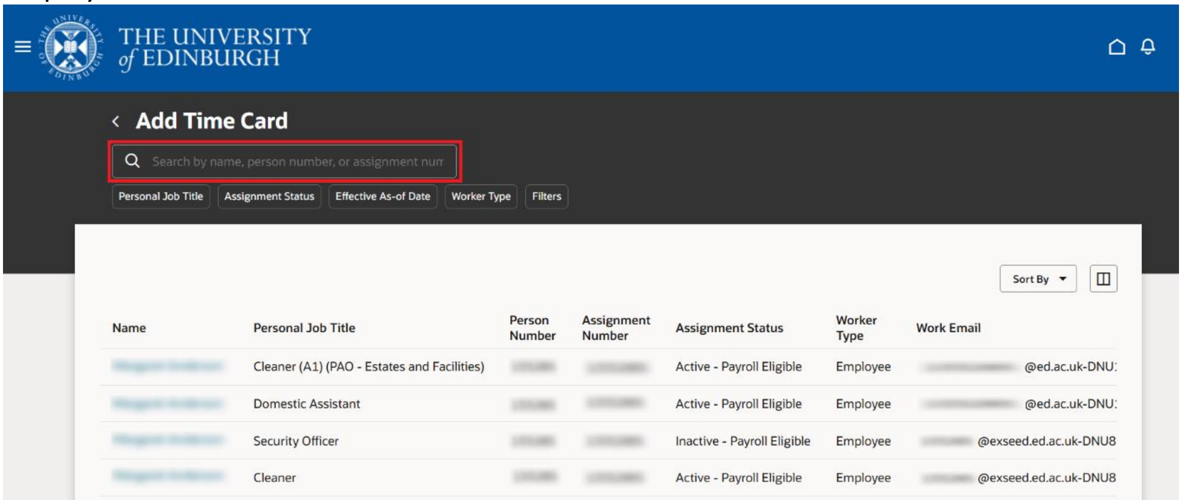
12. From the Homepage, click the **My Client Groups** tab. Scroll down and at the bottom of the **Quick Actions**, click **Show More**.

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

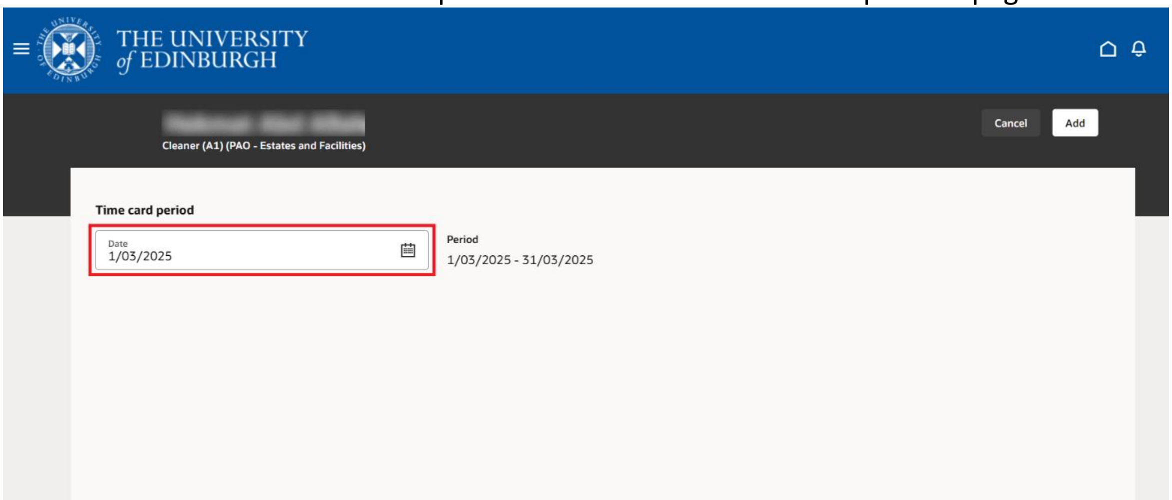
14. Click on the **Assignment Status** filter under the search bar and select **Active – Payroll Eligible** (**do not** select Inactive – Payroll Eligible as you cannot add a Time Card for an inactive

employee).

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.

## Via Team Time Cards

18. From the Homepage, click the **My Client Groups** tab. Scroll down and at the bottom of the **Quick Actions**, click **Show More**.

19. Scroll down until you see the **Time** section and select **Team Time Cards**.

20. Click on the **Add** button (+).

21. Search for the employee you wish to add a Time Card for or select from the list below the search bar.

22. Select the start date of the Time Card period and click on Add at the top of the page.

23. Follow steps 7 to 11 above.

## Monitoring Timesheet Data Entry and Submission

Timekeepers will not receive any system generated notifications or email in regard to Time Cards.

Timekeepers can edit Time Cards however, Approved Time Cards should only ever be edited if there are extra hours to be added to it, i.e., if someone forgot to submit all of their hours for the previous month(s). You can also edit a Time Card after it had been rejected by Payroll.

If an employee saves a Time Card instead of submitting it, this will allow Timekeepers to review, edit, and submit it on their behalf. If a school/department wishes for their employees to do this, they will need to communicate this in advance.

Likewise, a Timekeeper can enter and save a Time Card to allow someone else (another Timekeeper) to double check before it is submitted and flows through the process to payroll.

If a Time Card is submitted then rejected by the approver, the employee will receive a notification of this. This same Time Card can be amended and resubmitted by either the employee or the Timekeeper without starting the process again but must be submitted to payroll by the 10th of the month.

If a Timekeeper becomes aware that a Time Card has been approved but it has errors in it, they can ask the line manager or employee to delete the Time Card then they can start the process again.

**Note**: Time Cards should never be deleted if the employee has already been paid for the time. If the Time Card has the status 'Approved' this means it has already been through payroll approval and may have already been processed for payment. In this situation Timekeepers may need to contact Payroll by submitting an SR to the Help Desk.

Timekeepers should closely monitor Time Cards in the period 1st to the 10th of the month, to identify Time Cards for the current month with the status 'submitted' as this indicates that the manager or timekeeper still need to approve/ submit the Time Card. The timekeeper should check and submit these for payroll processing if appropriate by the 10th of the month.

Once the line manager or timekeeper has approved/submitted the Time Card and the payroll steps have been completed, the status will be "approved". It does not matter which order the approval steps occur.

Timekeepers will need to resubmit an employee's Time Card. This is because there is no way of filtering on which ones have just been submitted by the employee and which ones have also been approved by the line manager, as they will show as a status of submitted in both these situations. To ensure ALL Time Cards have been approved and passed onto Payroll you must follow the steps in the next section - How to resubmit an employee's Time Card to pass it on to Payroll to resubmit the Time Cards.

## Viewing Approved/Submitted 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.

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 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 is in place (apart from December when this will be earlier). This means employees, line managers and timekeeper **must not** edit the approved Time Card 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 11th and 20th February inclusive to ensure payment on 28th February.

## How to resubmit an employee’s Time Card to pass it on to Payroll

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

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

3. Remove the default **Date Range** filter (two weeks) by clicking on the cross.

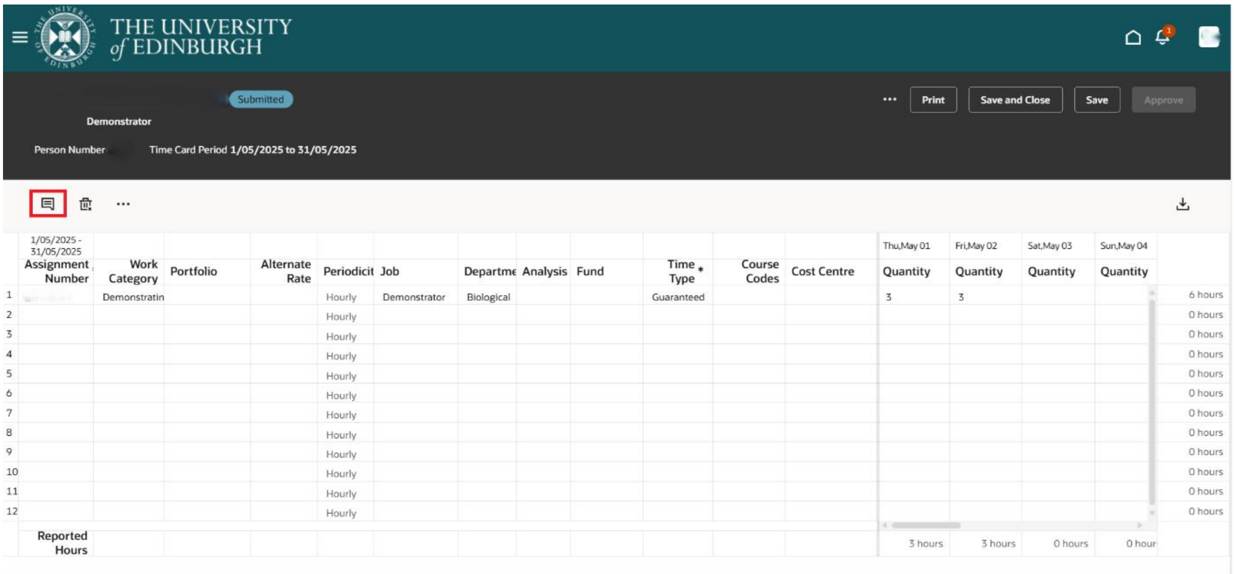
4. Click on the **Relative Range** filter and select a period (Select Previous Month, Previous 3 Months or Previous 6 Months. Alternatively, you can select a specific time period using the **Date Range** filter).

5. Click on the **Status** filter and select **Submitted**.

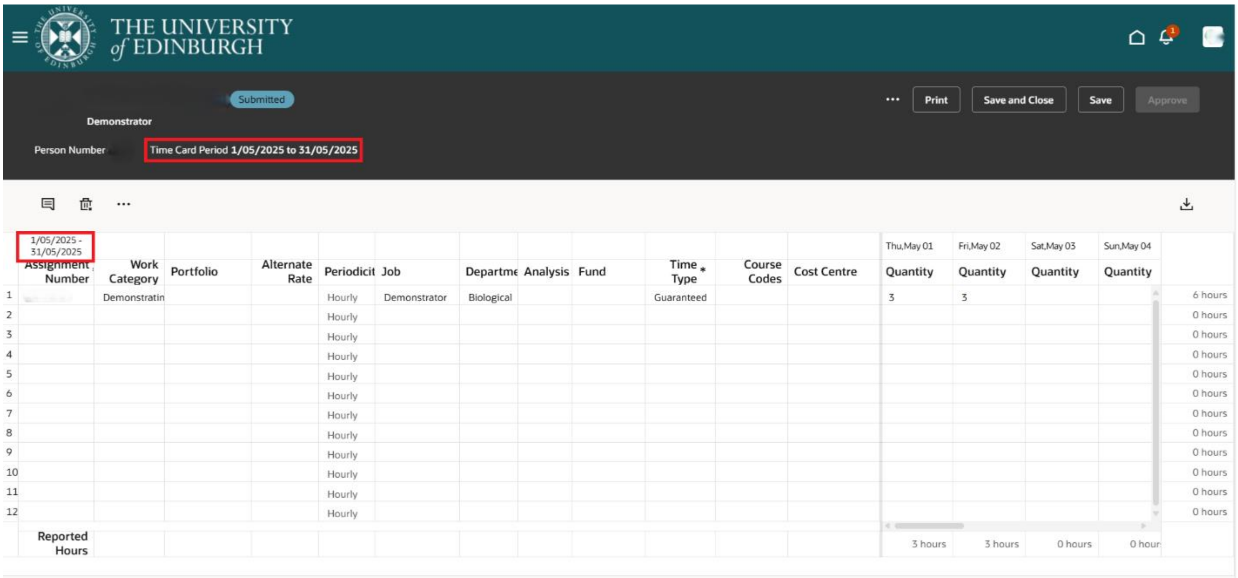
6. You can use other filters to refine your search further.

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. Ensure that you open the Time Card for the correct date.

8. Click on the **Comments** icon to check whether the employee has added any comments to the Time Card.




9. Check that the dates of the Time Card are for the correct period.

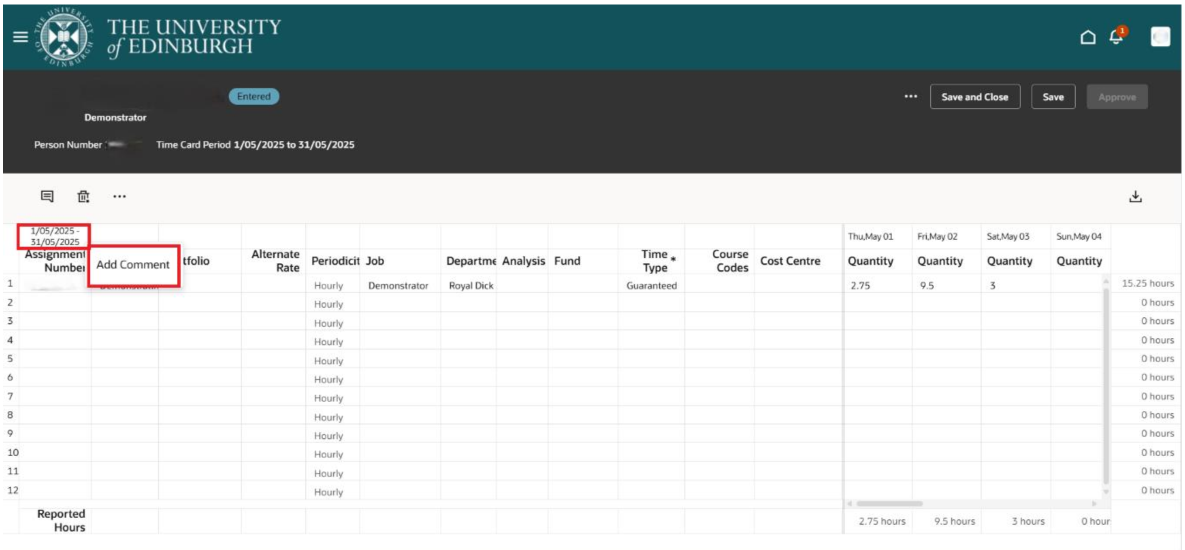



10. To **edit** the Time Card, overwrite the relevant fields (please note, if you edit the hours and press submit, you must leave and return to the app in order to see the updated hours).

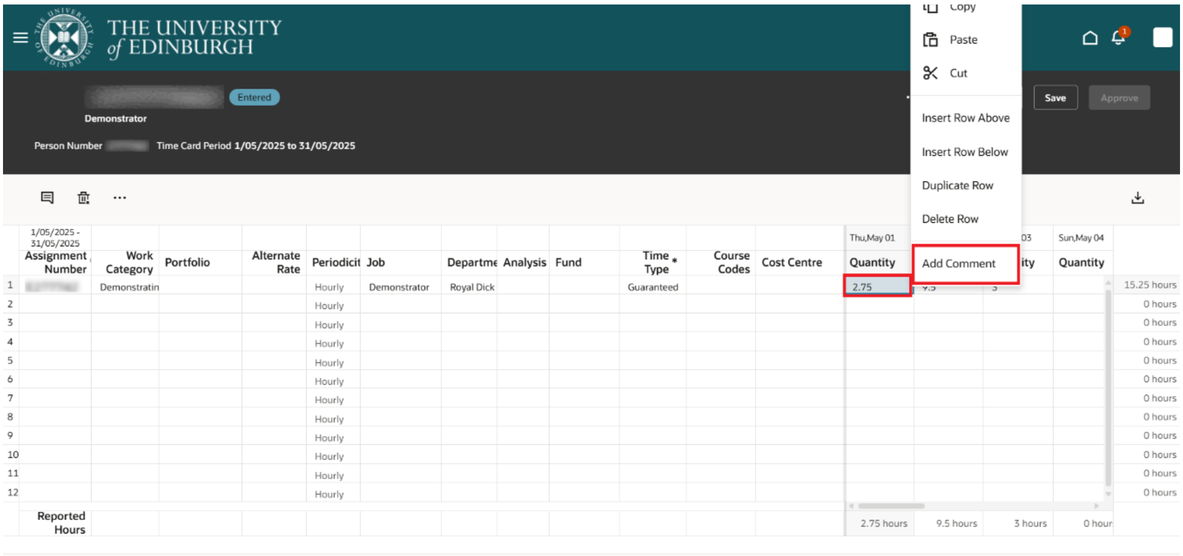
11. If the employee has entered hours for multiple assignments across different departments, you must check with the timekeepers (offline) in the relevant areas before approving or rejecting the Time Card. Once one of the timekeepers in one of areas has pressed Submit, approval will be given to **all assignments** listed on the Time Card and it will be sent to Payroll for payment.

12. If you want to reject the Time Card, you can click on **Save and Close. If you are rejecting it, make sure you add a comment** as to why, and contact the employee (offline) to let them know so that they can rectify it.

    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**.




13. If the Time Card is ready to be sent to Payroll for payment, click on the **ellipsis button** (3 dots) button and **Submit**.

14. The status of the Time Card will have changed depending on your action. If you selected Save and Close, the status will have changed to Saved. If you selected Submit, the status will have changed to Submitted.

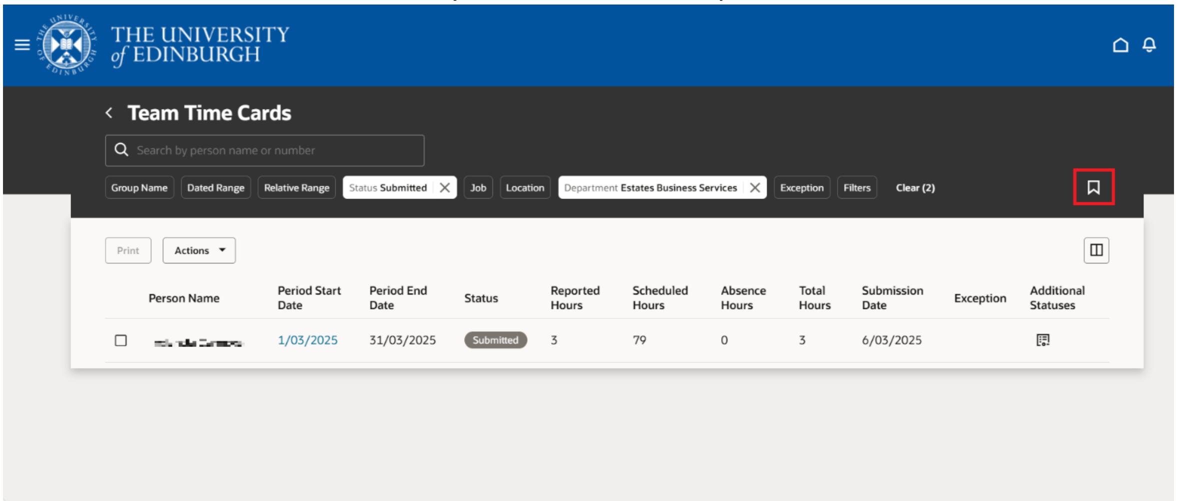
    **Note:** once submitted you should not edit the Time Card during the monthly Time Card freeze from the 10th to the 20th of the month.

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

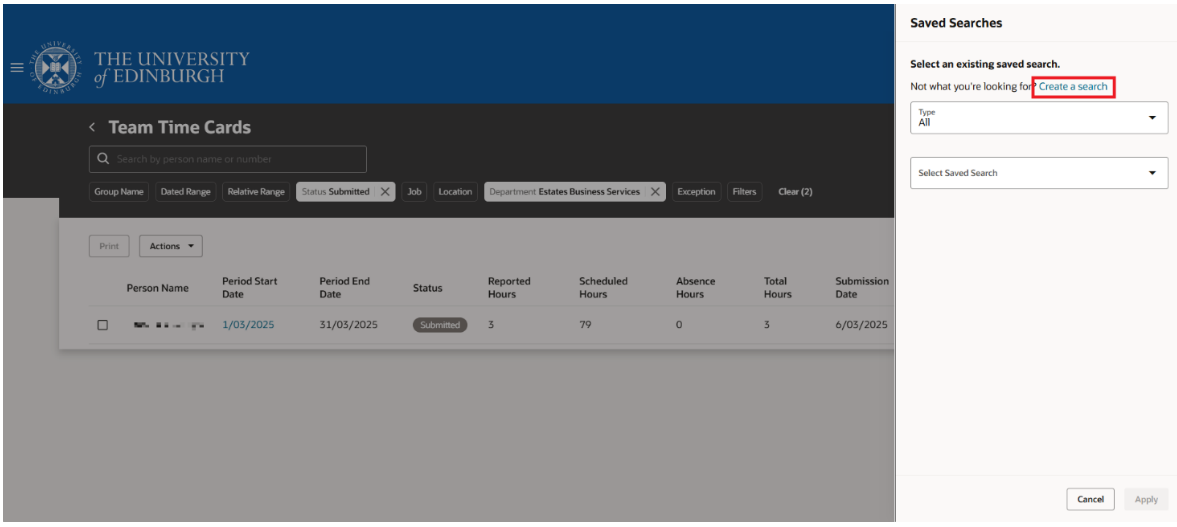
It is possible to set up saved searches on Time Cards if you have certain criteria you want to look out for on a monthly basis.

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

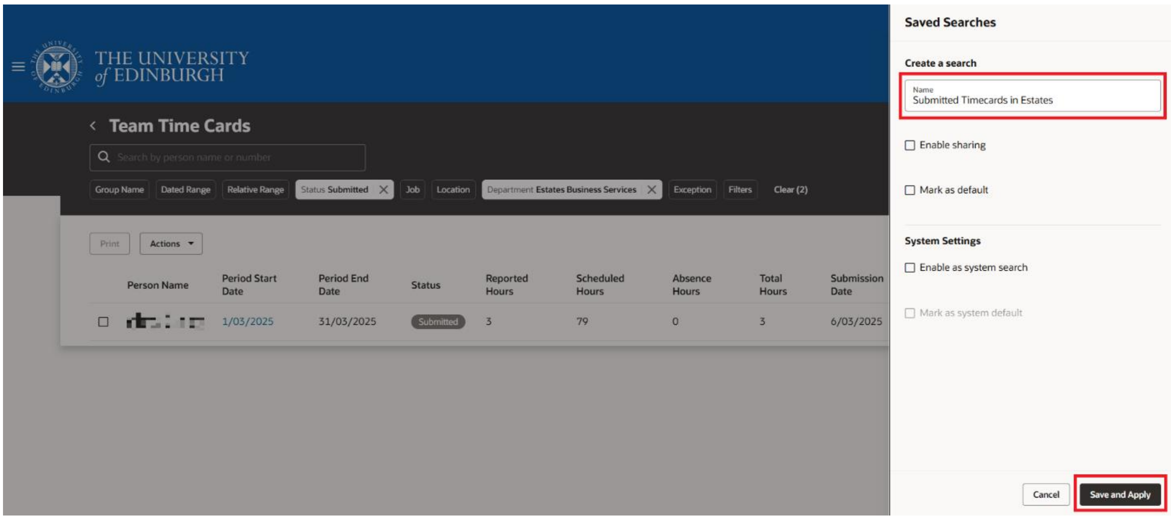
2. Click on the **bookmark icon** to set your current filters up as a saved search.




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**.

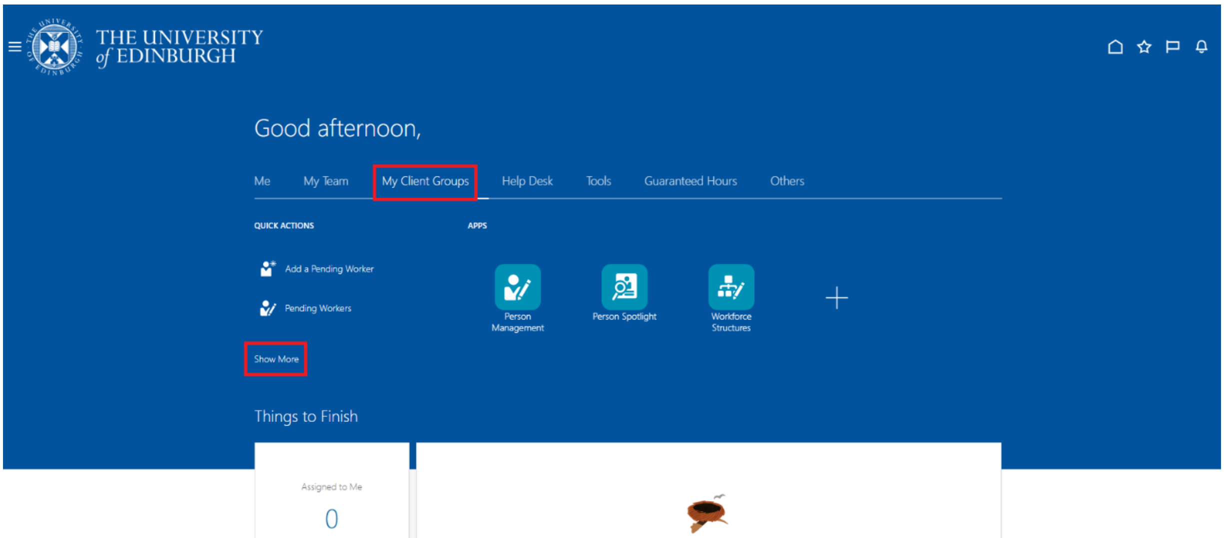



5. When you go back in to the bookmark icon, the search you have created will appear on the drop-down list under **Select Saved Search** so you can easily select this each time you visit this page (if you have not chosen to set it up as your default). You can also edit or delete the saved search by selecting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

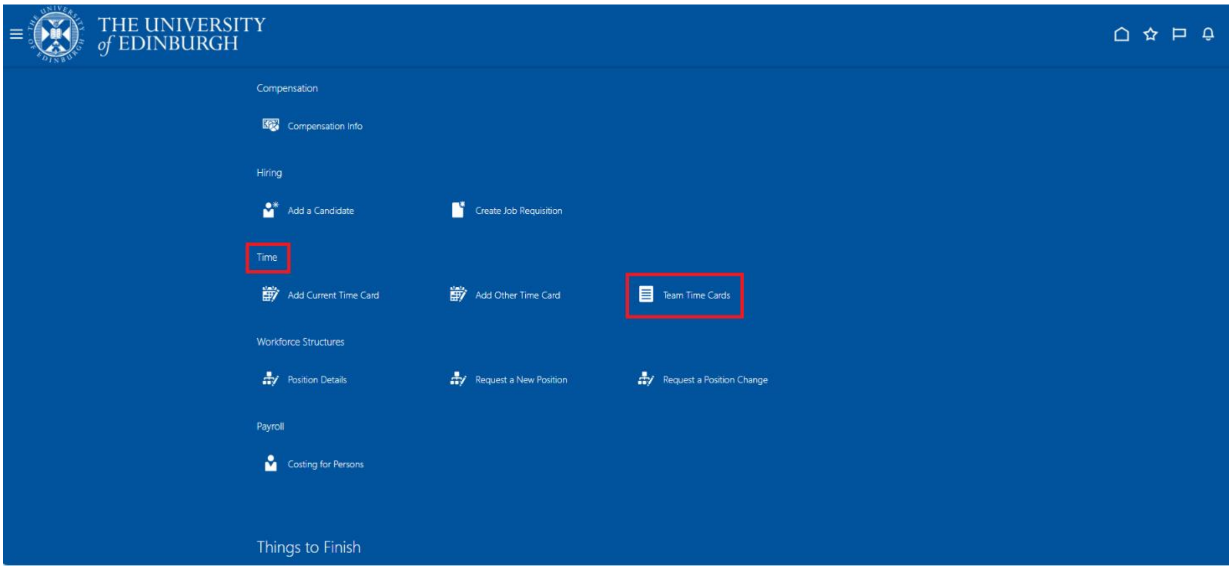
   **Note:** Different filter views will appear depending on whether you access them as a manager or as a timekeeper (if you hold both of these roles).

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

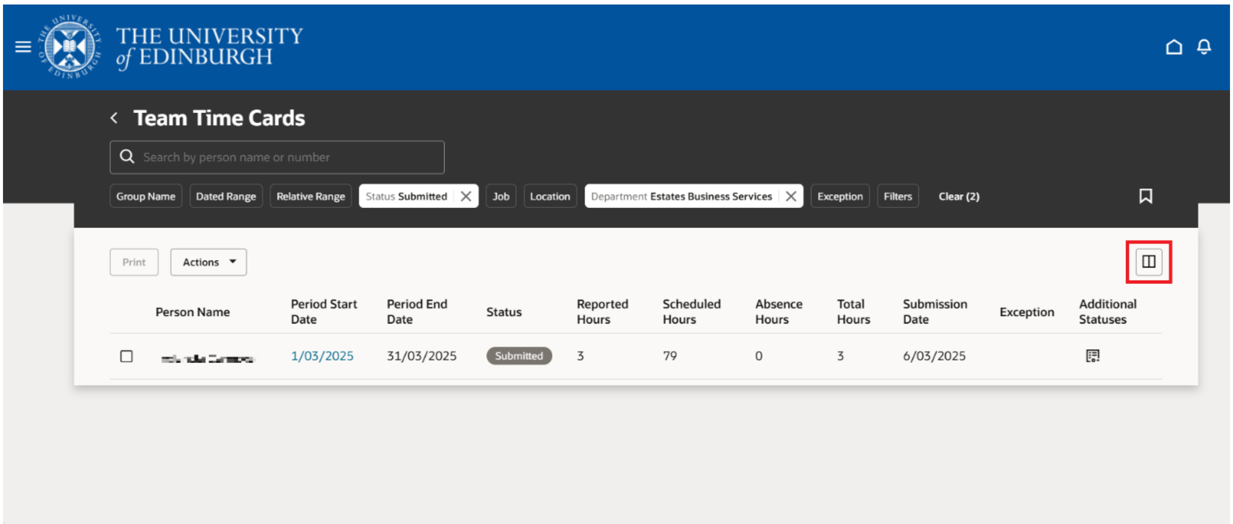
1. From the Homepage, under the **My Client Groups** tab, click **Show More** at the bottom of the Quick Actions.



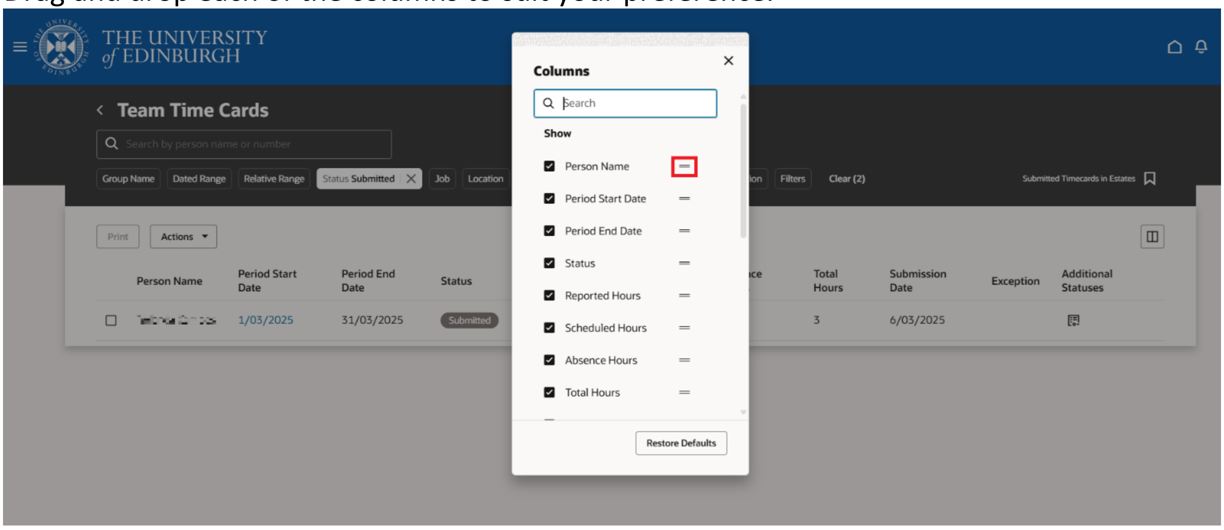

2. Under the **Time** section, click **Team Time Cards**.




3. Click on the **Columns** icon.

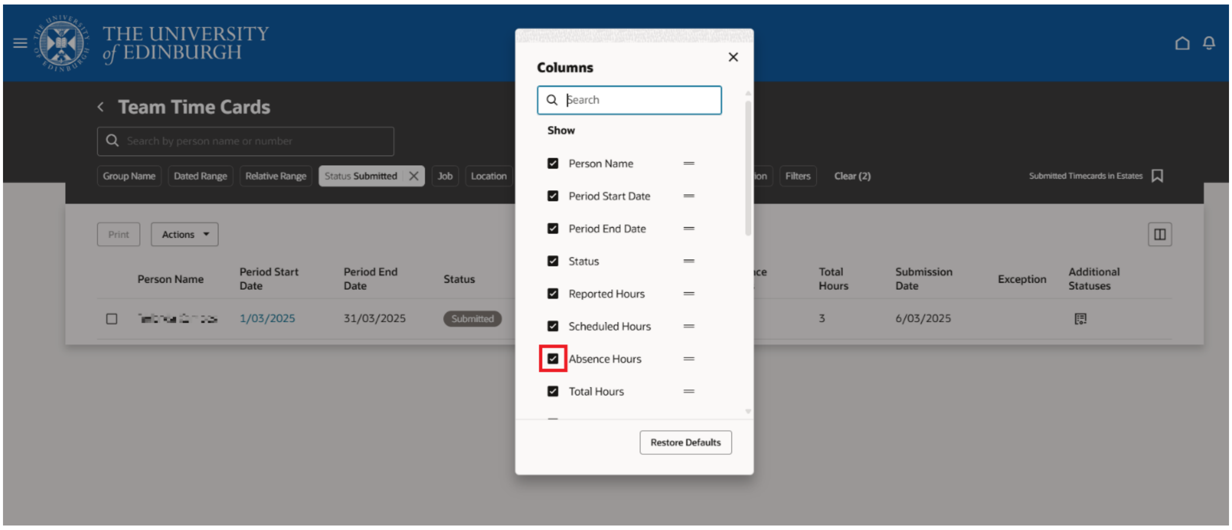



4. Drag and drop each of the columns to suit your preference.




5. You can also choose to hide or unhide columns of your choice by ticking or unticking

the box beside the column name.




6. 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 | 20/03/2025 | • Transferred guide to new template.<br>• In Section 4, removed reference to user being able to add a Time Card via Team Time Cards. Instead, have split section 4 of the guide in to two clear methods of generating a Time Card on behalf of an employee: Via Current Time Card and Via Existing Time Cards.<br>• Replaced all screenshots to reflect the new look of the Redwood screens.<br>• Added new section 'How to change the order of columns in Team Time Cards screen'.<br>• Added guidance on how to use the new Redwood screens. | M Easton – Head of HR Process Improvement |
| 2.0 | 19/05/25 | Updated to reflect the changes in 25B quarterly release. | ME/HM |

## 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.