

The State University of **New York**

Electronic Time and Attendance System

Guide for FT and PT UUP and MC Employees (Faculty, Staff and Supervisors)



Overview of Monthly Time and Attendance System (TAS) For All Employees

- 1) Sign –in to SUNY HR Time and Attendance
- 2) Select an Accrual Period (Month)
- 3) Enter Charges for Vacation, Sick, or Other Used Time
- 4) Request Time Off
- 5) Certify and Submit Time Record for Supervisor Approval
- 6) Sign-out of SUNY Browser and Close

First-time System Sign-in Information

- For security reasons your sign-in will be different the first time you enter into the Time and Attendance System. Here, you will be asked for your SUNY ID and your DOB.
- Once you complete this security procedure, your sign-in will appear differently going forward. There will be no need for you to use your SUNY ID again for this process.



Sign in to SUNY at:

Bookmark

As described in the previous slide, the screen will be slightly different your first time in. You will be required to enter your SUNY ID and DOB.

First, you will encounter a Sign-on screen



Next, you will come to a one-time security screen

For security reasons your sign-in will be different the first time you enter the Time and Attendance System - use the SUNY ID provided by HR for the third question.

Security Questions

First Name	
Last Name	A
SUNY ID(not your SSN, ID provided by HR)	X
Date of Birth (in MM/DD/YYYY format)	



Accessing your Time Record

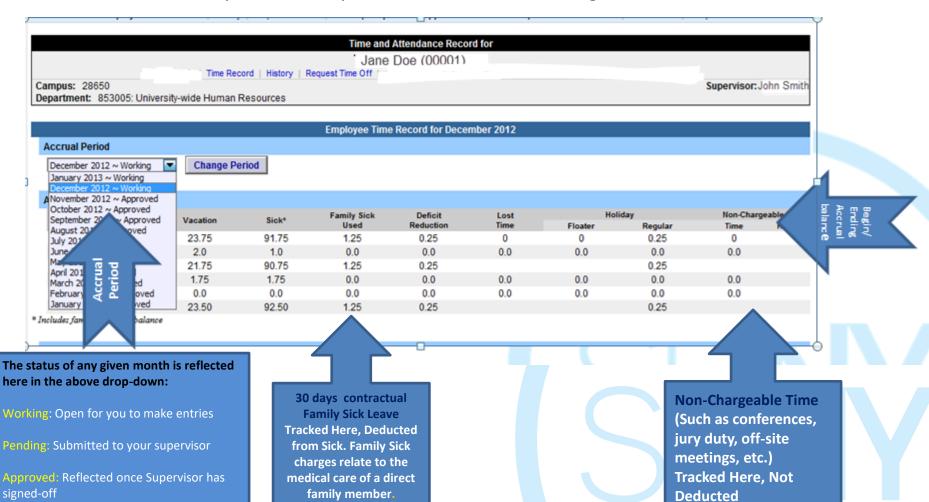
Click on "Time and Attendance" Tab to work on your time record





MC and UUP Staff Time Record

Time record will automatically open to the current month. To change to a previous month select from the drop down shown below. Employees can only see their time records from the date the system was implemented at Purchase College in 2014.





Cancel/Return to Home

PDF Report

View Holidays

Charging Vacation, Sick, or Other Time

Double click on the day you wish to enter the accrual charge.
 From the pop up box (shown on the next page), enter the appropriate accrual charge/s.

nuary 2012							
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday		Saturday
1	2 New Year's Day	3	4	5	6		7
8	9	10	11	12	13		auble elielee
							ouble click o
15	16	17	18	19	20	th	ne day to ento
	Martin Luther King Day						charges.
22	23	24	25	26	27		28
29	30	31					
8 - Saved Time Off P - Pending Time (A - Approved Time Record Commen	Off Request. Off Request.			Heliday Tima Wadaad			
	ts			Holiday Time Worked			
Comments.]				Holiday Name	Floater?	Observed Date	Earned Amount
itional	A			New Year's Day	N	01/02/2012	0
ments:	~			Martin Luther King Day	/ N	01/16/2012	0



View of Sub-Menu Produced by Clicking on Individual Calendar Dates

• The pop up opens up a single day request (shown on the left). To enter a date range, select the Show Multi Day button shown on the right (shown on next screen). Enter the increment (increments of .25 days only) in the field which you want to charge, then select Save. Once saved, the accrual charge will appear on your time record.

Time Record Posting **Multi-Day** Single Day Leave Show Multi-Day **Single Day** From Date: 01/09/2012 Vacation: Sick: Family Sick: Holiday: Floater: Voluntary Work Reduction: Deficit Reduction Leave (M/C only): Non-Chargeable: Non-Chargeable Type: Adjustment Reason: (Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)



Multiple Day Leave

	Time Record Posting	
Multiple Day Leave		Show Single-Day
From Date:	01/25/2013	
* To Date (2):	(mm/ddlyyyy)	
* Number of Consecutive Days:	1	
* <u>C</u> harge Per Day (0-1.0):	1	
*Accrual/Leave Type:	Select ▼	
Adjustment Reason:	Select ▼	
Comments (r):	A T	

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)



Reminders:

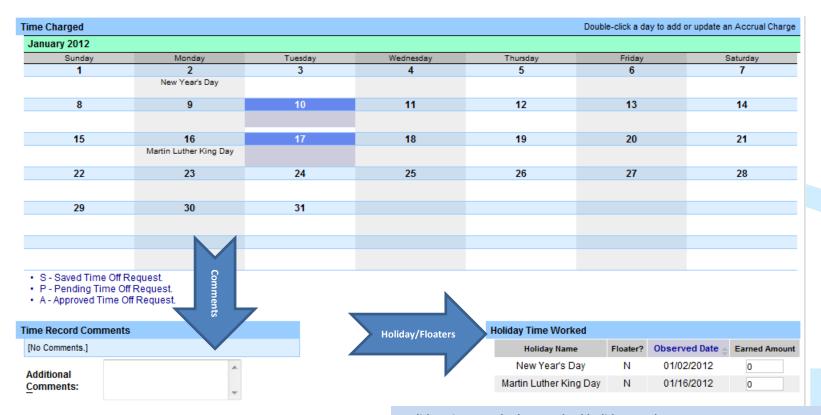
Charge accruals can not span across multiple months.

If a holiday falls within a time charged, a separate entry must be submitted, excluding the holiday.



Other features on the Time Record

- Comment Section: Enter comments in the box indicated below if you wish to submit comments to your supervisor on your time record. (Comments should be kept strictly professional since they cannot be removed)
- Holiday Time Worked Holiday/Floaters that fall within the month. These dates are preset by your campus calendar.
- View Holidays list of all holiday/floaters that have been earned, charged and expiration date.
- PDF Report Printable time record.



Holiday Time Worked - Standard holidays such as: New Years, MLK Day, Memorial (Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.) Day, Independence Day, Labor Day, Columbus, Veteran's day, Thanksgiving and Cancel/Return to Home Christmas will automatically be charged "0" as an Earned Amount because it's anticipated that most employees will not be working these days. If an employee has View Holidays **PDF Report**

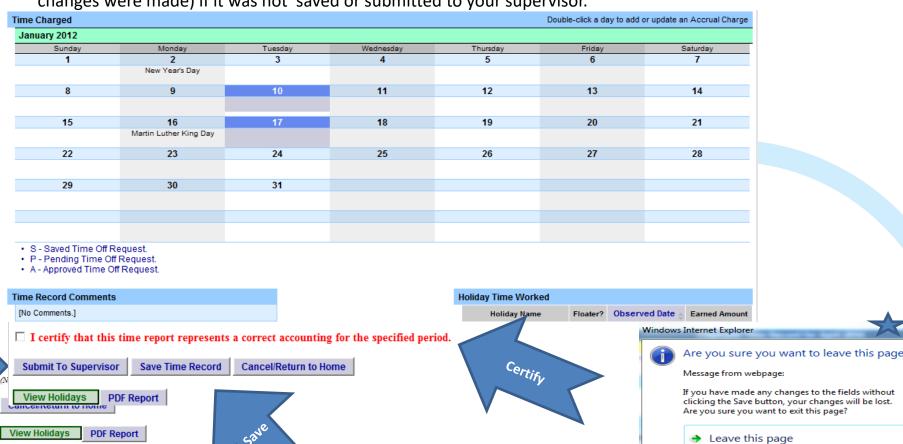
worked the holiday they can go in and change the Earned Amount to 1



mit

Certify and Submit to Supervisor

- When a time record is complete, either certify and submit to your supervisor or save the time record to submit at a later time.
- To send to your Supervisor, click on the "I Certify" box and select Submit to Supervisor
- NOTE: You will receive a pop up message if you try to navigate away from your time record (where changes were made) if it was not saved or submitted to your supervisor.





Requesting Time Off

For prior approval for time off, click on the Request Time Off link highlighted below. Then double click on the day you wish to request off on the calendar.

		time and Attendance Record for	
		Jane Doe (00001)	
	Time Record History		
Campus: 28650			Supervisor: John Smi
Department: 853005: Univer	reity-wide Human Recourage		

Department: 853005: University-wide Human Resources

			Time Off Reques	st			
Entitlement Balances							
Name	Vacation	Sick*	Family Sick	Deficit	Lost	Hol	iday
name	vacation	SICK	Used	Reduction	Time	Floater	Regular
Current	23.75	91.75	1.25	0.25	0	0	0.25
Post-Request* (on 01/31/13)	25.00	94.25	0.0	0.00	0.0	0.0	0.25

^{* -} Estimated Pst-Request Balances are based on the current accrual and employment information and may not reflect the actual balance on that date. These amounts are for planning purposes only.

uary 2012					<< Year < Month	Today	Month >	Year >
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday		Saturd	iay
1	2	3	4	5	6		7	
8	9	10	11	12	13		14	
15	16	17	18	19	20		21	
22	23	24	25	26	27		28	
29	30	31						

- · S Saved Time Off Request.
- P Pending Time Off Request.
- A Approved Time Off Request.



Requesting Time Off

The pop up opens up a single day request (shown on the left). To enter a date range, select the Show Multi Day button shown on the right. Enter the increment (increment of .25 days only) and accrual you wish to charge and click save.

	4				
		Time Off Request			
Single Day Leave	Single Day			Multi-Day	Show Multi-Day
From Date:	Single Buy	12/17/2012			_
Vacation:		0			
Sick:		0			,
Family Sick:		0			
<u>H</u> oliday:		0			
Floater:		0			
Voluntary $\underline{\mathbf{W}}$ ork Reduction:		0			
<u>D</u> eficit Reduction:		0			
Los <u>t</u> Time:		0			
Military Leave:		0			
Non-Chargeable:		0			
Non-Chargeable Type:		Administrative Leave			
Adjustment Reason:		Select			
Comments (\underline{r}) :			÷		

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)

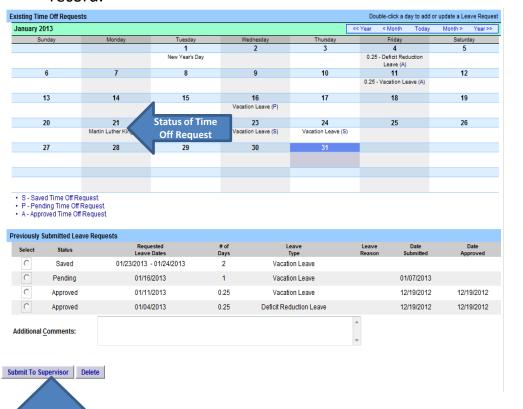




Select radio button and submit

Requesting Time Off

Once the request has been saved, it will appear on the calendar and under the Previously Submitted Leave Request along with the status (Saved, Pending and Approved). To submit the request to your Supervisor, select the radio button and click Submit to Supervisor. Once submitted, the request will appear on the monthly time record.



Reminders:

- The status of your request will also appear in parenthesis on your monthly time record (S, P, A).
- If you need to <u>change</u> a time off request and it has not been approved by your supervisor, you must currently be on your **Time Off Request calendar.** Double click on the day to update.
- To <u>delete</u> a previously submitted leave request, simply select the radio button next to the associated request and then click delete.
- Employees will be unable to submit a time record with pending time off request.
- Time off requests can not span across multiple months.



Sign out of the SUNY browser and CLOSE

 To ensure your privacy and system security, please log off by clicking on "Sign Off" link in the upper right hand corner of your screen.





Time and Attendance System (TAS)

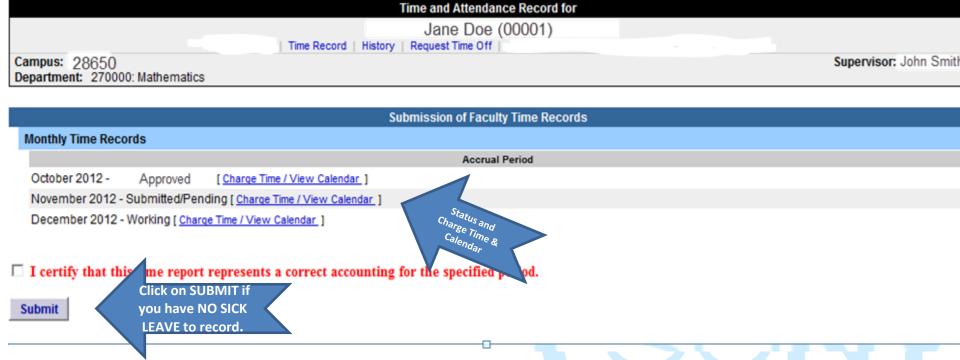
Faculty Time Record





Faculty Time Record

- Faculty employees are able to certify and submit their time records directly from their summary page (shown below), if there are no charges within the month. You will only be able to submit one time record (the earliest working one) at a time.
- To submit with no time charged, simply click "I certify" box and then submit. Once submitted, it will go into Submitted/Pending status until approved by supervisor.
- To charge time, select "Charge Time/View Calendar" and you will be brought into your time record calendar as shown on the following slide.





Cancel/Return to Home

PDF Report

View Holidays

Individual Calendar Dates

Double click on the day you wish to enter the accrual charge.
 From the pop up box (shown on the next page), enter the appropriate accrual charge/s.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday		Saturday
1	2 New Year's Day	3	4	5	6		1
8	9	10	11	12	13		
							ouble click
15	16	17	18	19	20	tl	ne day to en
	Martin Luther King Day						charges.
22	23	24	25	26	27		28
29	30	31					
- Saved Time Off R - Pending Time Off - Approved Time Of	Request. ff Request.						
Record Comments				Holiday Time Worked			
omments.]				Holiday Name	Floater?	Observed Date	Earned Amount
ional				New Year's Day	N	01/02/2012	0
nents:	*			Martin Luther King Day	N	01/16/2012	0



Charging Sick Time

The pop up opens up a single day request (shown on the left). To enter a date range, select the Show Multi Day button shown on the right (shown on next screen). Enter the increment (increments of .25 days only) in the field which you want to charge, then select Save. Once saved, the accrual charge will appear on your time record.

	_		Time Record Posting		
Single Day Leave	Single Day		•	Multi-Day	Show Multi-Day
From Date:	Siligic Day	01/09/2012			
<u>V</u> acation:		D			
<u>S</u> ick:		0			
Family Sick:		0			
<u>H</u> oliday:		0			
Floater:		0			
Voluntary <u>W</u> ork Reduction:		0			
Deficit Reduction Leave (M/C only):		0			
Non-Chargeable:		0			
Non-Chargeable Type:		Select	·		
Adjustment Reason:		Select	v		
(Note: Pressing <alt> and an underlined character w</alt>	ill focus the cursor on the associated for	m field.)			



Multiple Day Leave



Reminders:

❖ Charge accruals can not span across multiple months.

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)







mit

Certify and Submit to Supervisor

- When time record is complete, either certify and submit to supervisor or save time record to submit at a later time.
- To send to your Supervisor, click on the "I Certify" box and select Submit to Supervisor
- NOTE: You will receive a pop up message if you try to navigate away from your time record (where changes were made) if it was not saved or submitted to your supervisor.





Cancel/Return to Home

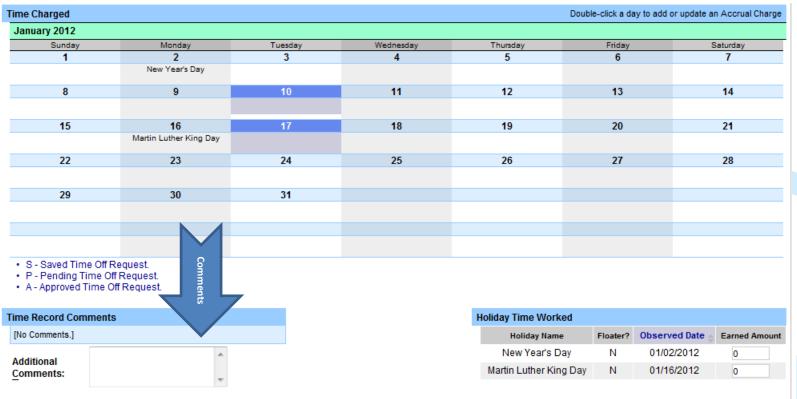
PDF Report

View Holidays

Other features on the Time Record

- Comment Section: Enter comments in the box indicated below if you wish to submit comments to your supervisor on your time record. (Comments should be kept strictly professional since they cannot be removed)
- PDF Report Printable time record.

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)





Sign out of the SUNY browser and CLOSE

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CONGRATULATIONS!

- For those of you without direct reports, once you have entered your current Time and Attendance Information, you have successfully completed the training session.
- These Step by Step instructions can be viewed on HR's Website
- Supervisors, there are a few more slides about the process for approving time records and/or time off requests for your employees.



Time and Attendance System (TAS)

Supervisor's Guide





Overview of Monthly Time and Attendance Process – For Supervisors

- 1) Sign in to SUNY HR Time and Attendance
- 2) Select "Work Roster."
- 3) View employee's Time Record and/or Time Off Requests.
- 4) Select "Approve," "Deny," or even "Postpone"
- 5) Select "Submit"

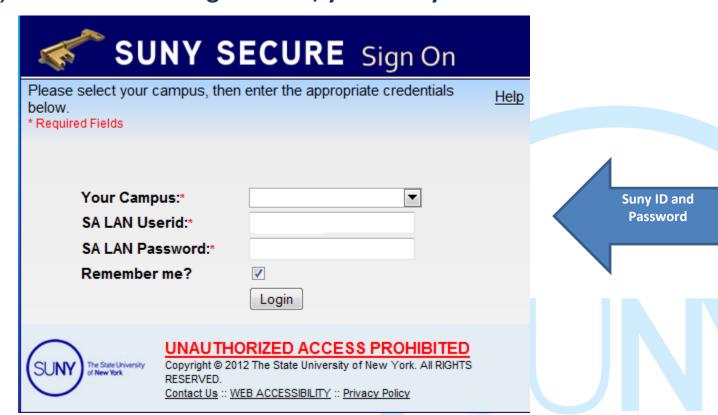




Sign in to SUNY at:

Bookmark

• As described in a previous slide, the screen will be slightly different the first time you log in, requesting your SUNY ID and DOB. *That is a one-time security occurrence*. **Going forward, your entry screen will look like this:**





Accessing your Time Record

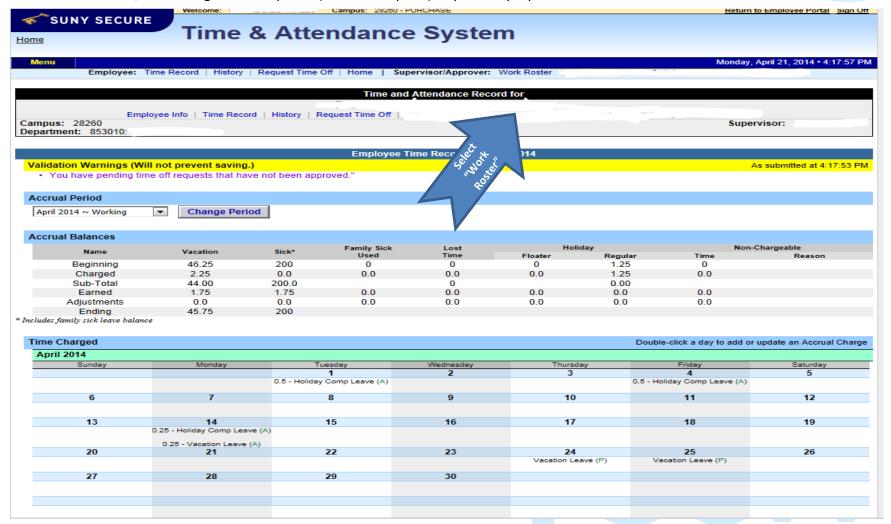
Click on "Time and Attendance" Tab to get into your time record





Supervisor's Work Roster

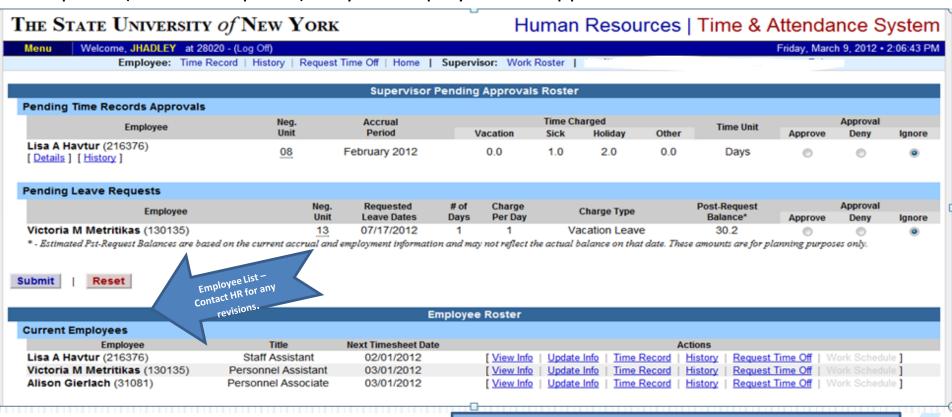
Once you've selected the Time and Attendance tab, your own Time Record will open. Select the "Work Roster" tab to view the Pending Time Records and/or Pending Leave Requests (time off request) of your employees.





Supervisor Work Roster

After you've selected the Work Roster tab any Pending Time record/s and/or Pending Leave Requests (time-off requests) for your employees will appear.



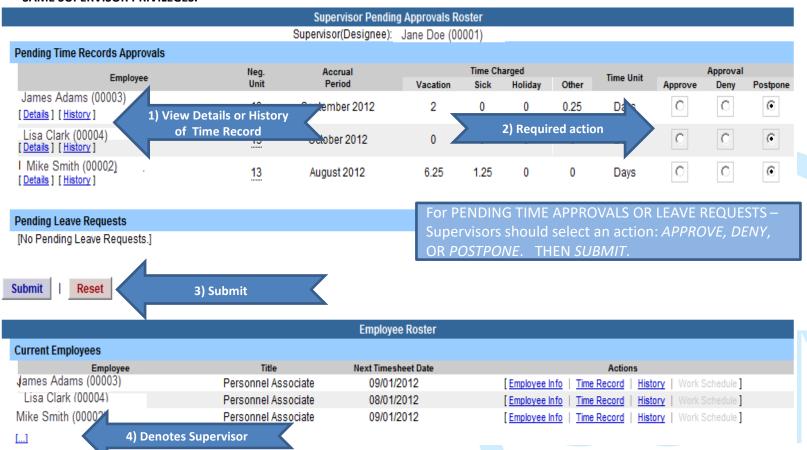
For PENDING TIME APPROVALS OR LEAVE REQUESTS – Supervisors should select an action: *APPROVE, DENY,* OR *IGNORE*. THEN *SUBMIT*.



SUPERVISOR WORK ROSTER

ON THIS PAGE SUPERVISORS CAN:

- 1. VIEW EMPLOYEE'S ELECTRONIC TIME RECORD
- 2. DETERMINE AN ACTION (APPROVE, DENY, OR POSTPONE) ANY DENIED ACTION REQUIRES COMMENTS FOR THE EMPLOYEE'S INFORMATION.
- 3. "SUBMIT"
- 4. IF [...] ICON APPEARS UNDER AN EMPLOYEE'S NAME THIS INDICATES THE EMPLOYEE IS ALSO A SUPERVISOR WITHIN THE DEPARTMENT. IF YOU CLICK ON THE [...] ICON THEIR SUPERVISOR WORK ROSTER WILL BE BROUGHT UP, AND YOU HAVE ALL THE SAME SUPERVISOR PRIVILEGES.





 To ensure your privacy and system security, please log off by clicking on "Sign Off" link in the upper right hand corner of your screen.









<u>A Designee:</u> – refers to a person who has been designated to perform some duty or carry out some specific role.

Types of Designee within TAS:

- 1. *Employee Designee designate another employee the ability to enter monthly time records for a specific period of time or indefinitely on behalf of the employee.
- 2. Supervisor Designee designate another employee/supervisor the ability to take action (approve/deny) on all pending time records and/or time off request.

*Note: The original employee's signature is still required to support the time record. This can be attained by a hard copy the employee completes and gives to the Designee to enter into the system <u>or</u> the electronic PDF that once the information has been entered can be printed out for the original employee's signature.

The use of a supervisory designee should be limited and the responsibility should be understood by all parties involved. The designee to approve timesheets should be someone in the supervisory chain because of the liability issues related to the approval of a timesheet. The person who approves the timesheet is ultimately responsible for the accurate reporting of the information they approve.

Requesting a Designee

Both an employee and supervisor are required to complete a Designee Form. Once a Designee Form has been signed by the Employee, the Employee's Supervisor and the Designee, the form must be submitted to the Payroll Office for review and authorization by a Payroll Facilitator. Once the facilitator signs the Designee Form, the designee will be setup in the system. <u>No</u> designee assignments will be setup without a fully endorsed designee form.



Once the Designee has been established, they will appear on the Current Proxies (shown below). This also indicates which role they have been assigned, Employee Designee, Supervisor Designee and/or Approver Designee.

Current Designe	es						
Select	Effective Date	End Date	Suny ID	Name	Employee Designee	Supervisor Designee	Approver Designee
0	05/01/2012		131689	John Smith	Yes	Yes	No
Update	Add						

To end a Designee after it has been created, click on the radio button next to the employee's name you wish to work on and enter the appropriate end date.

To remove a Designee, click on the radio button next to the employee's name you wish to work on and make the end date equal to the effective date.

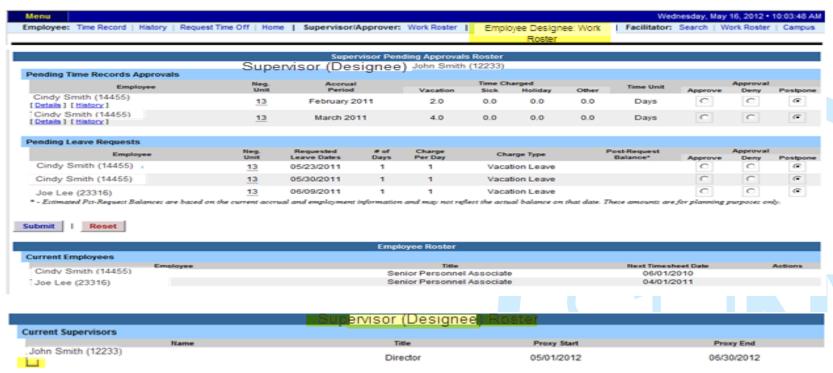


<u>To Work on the Supervisor/Approver: Work Roster:</u>

Click on the corresponding link on the tool bar (highlighted below in yellow).

Menu Friday, February 15, 2013 • 12:53:35 PM Employee: Time Record | History | Request Time Off | Home | Supervisor/Approver: Work Roster | Facilitator: Search | Work Roster | Campus Rules

- The Supervisor Designee Roster will appear (shown below).
- If Designee currently has supervisor responsibilities, their work roster will appear at the top of the page.
- The Supervisor/Approver Work Roster will be displayed under the Employee Roster (highlighted below in yellow).
- To begin working on the roster click on the [...] icon (highlighted below in yellow) under the supervisor's name.
- Follow separate Supervisor instructions to begin working on the Work Roster.





Employee Designee:



Once employee has been established as an Employee Designee, the Designee now has access to the employee's time record, request time off, and history by clicking on the link above (highlighted in yellow).



Once the Employee Roster is displayed, select the function you wish to work on (Time Record, Leave Request, and History). Follow separate instruction according to Negotiating Unit (UUP and MC, non-hourly).

 Time record submission is now officially a MONTHLY process.

 System-generated e-mail reminders are sent out to employees, supervisors and supervisor's supervisor.



Thank You!

If you have any questions, please contact any member of the HR Time and Attendance implementation team.

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