

Library CalTime Training
October 2014

Manager and Supervisor sessions will cover

- How to create shortcut/favorites on your computer
- How to log on with your Calnet and passphrase

Navigation:

- Using Genies and Quickfinds
- Custom Fields
- How to find your people
- Time review/approvals
- Earnings reports
- Balances

Changes for Student Timecard reporting and approvals:

- Clock updates
- Transferring in

Employee non-exempt reporting:

- Timecard
- Reporting time for real time employees
- Alternate lunch breaks
- Reporting leave usage

Job Aides:

Supervisors Approve

Student Supervisors

Custom Fields summary

Affinity Groups

Approve Leave:

Open your employee list:

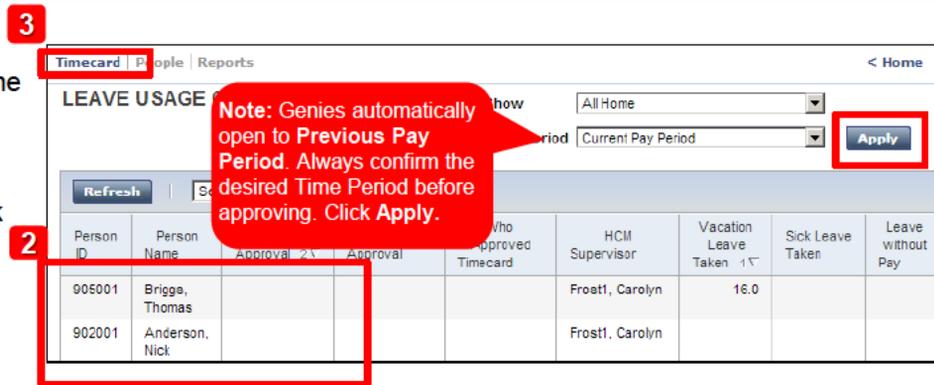
- 1 Click the **Leave Usage Genie** link.



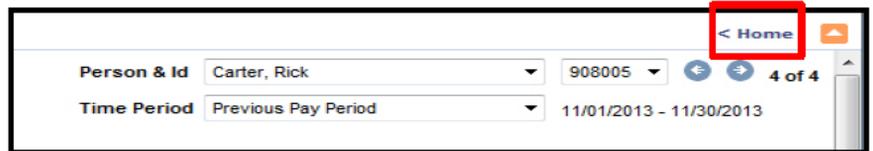
- 2 Select the employees whose time card you are ready to approve.

To select multiple employees, hold down the **Ctrl** key and click names.

- 3 Click the **Timecard** link in the upper-left corner of the page.



At any time, click the **Home** link in the upper-right corner of the page, to return to the main menu.

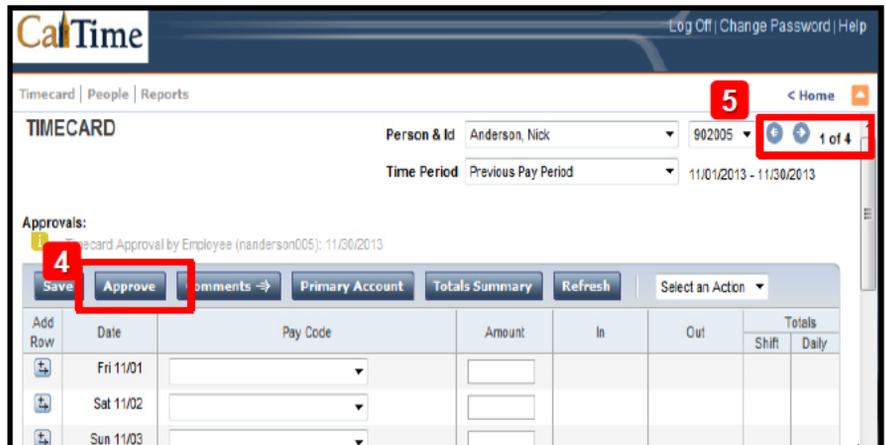


The first timecard opens.

- 4 Review the timecard and confirm leave reported, then click the **Approve** button.

Note: If the timecard does not report leave correctly, ask the employee to edit his/her timecard accordingly prior to your approval.

- 5 Use the navigation arrows to move to the next employee's time card and repeat step 4.



After you have approved, a date-stamped confirmation message appears below the employee confirmation, and the **Remove Approval** button appears.

After you have approved, return to the **Leave Usage Genie** (step 1) and click the **Refresh** button to verify all necessary approvals have been made. Repeat steps 2 – 4 to approve additional timecards.

Person ID	Person Name	Employee Approval	Supervisor Approval	Who Approved Timecard	HCM Supervisor	Vacation Leave Taken	Sick Leave Taken	Leave without Pay	Other Pay Codes	Primary Labor Account
905001	Brooks, Thomas	✓	1	Frost1, Carolyn	Frost1, Carolyn	24.0				TEST011111-1901001L
902001	Anderson, Nick				Frost1, Carolyn					TEST011111-1901001L
904001	Brooks, Ginny				Frost1, Carolyn					TEST011111-1901001L

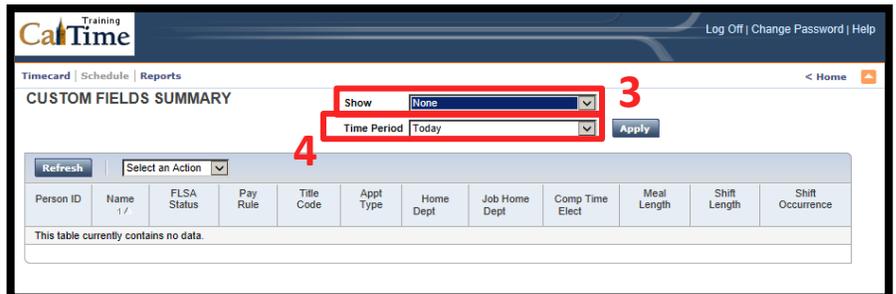
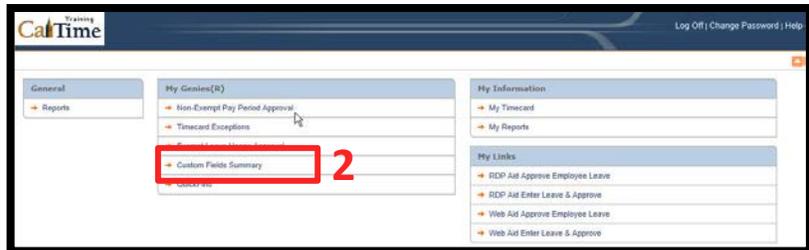
Log Out of CalTime:

For PC and Mac users:

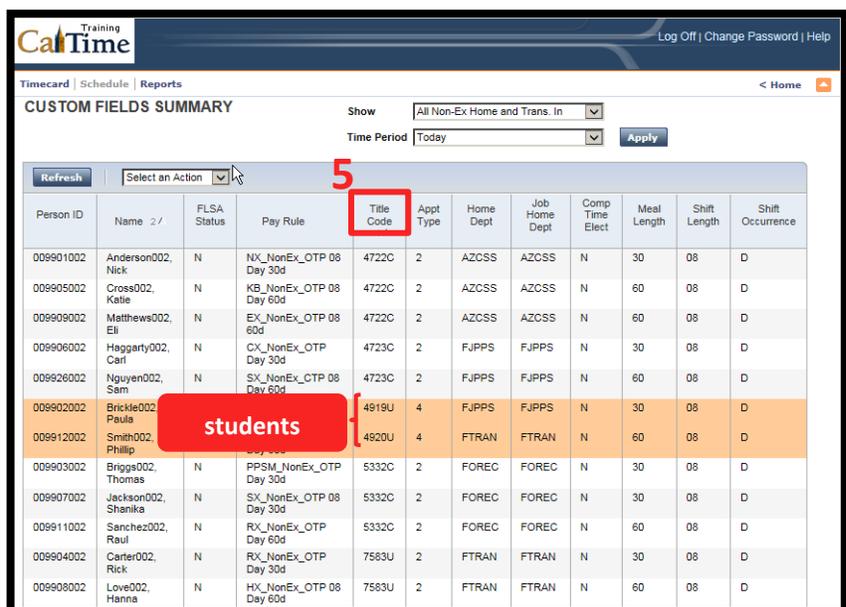
6 Click the **Log Off** link at the top-right of the application window.

The **Custom Fields Summary Genie** shows you the current **FLSA Status** (E=exempt, N=non-exempt), **Title Code**, **Appt Type**, **Home Dept**, **Job Home Dept**, **Comp Time Elect** choice, **Meal Length** for automatic meal deduction after 6 work hours, normal **Shift Length**, and **Shift Occurrence** for each of your non-exempt employees. This Genie can be helpful if an employee makes a query about any of the above or if a supervisor needs to request a change in any of the custom field settings, such as meal deduction.

1. Log in to CalTime. (See the job aid "All_Logging In to CalTime" for log-in steps.
2. Choose the **Custom Fields Summary Genie**.
3. From the **Show** drop list, select **All Non-Exempt Home & Trans. In**.
4. **Time Period** defaults to **Today**, which is generally appropriate.

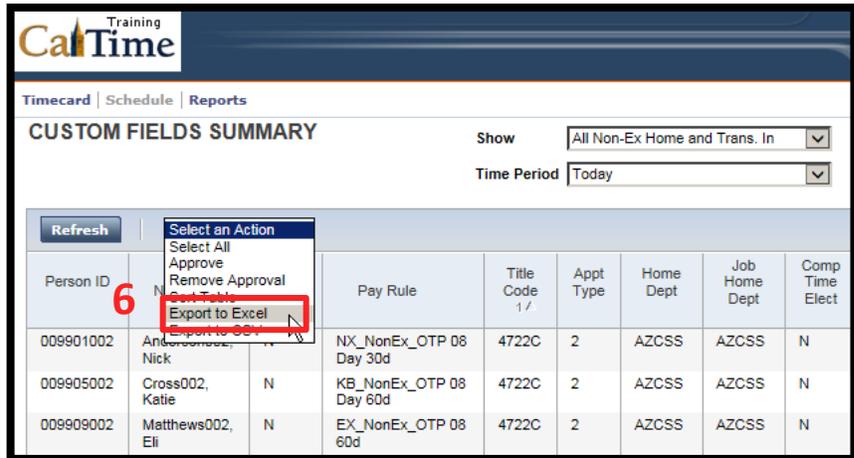


5. All columns in this Genie are sortable. For example, to group by **Title Code**, click once on the **Title Code** column heading. This moves the low title codes to the top of the list.

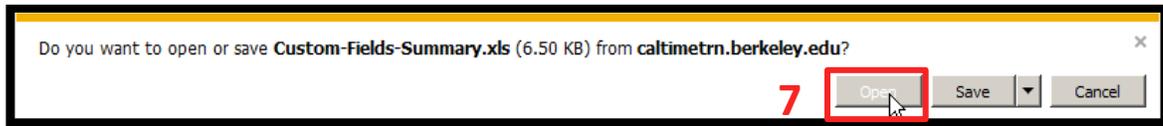


You can also export the contents of this Genie to Microsoft Excel or as a comma-separated-value (CSV) file.

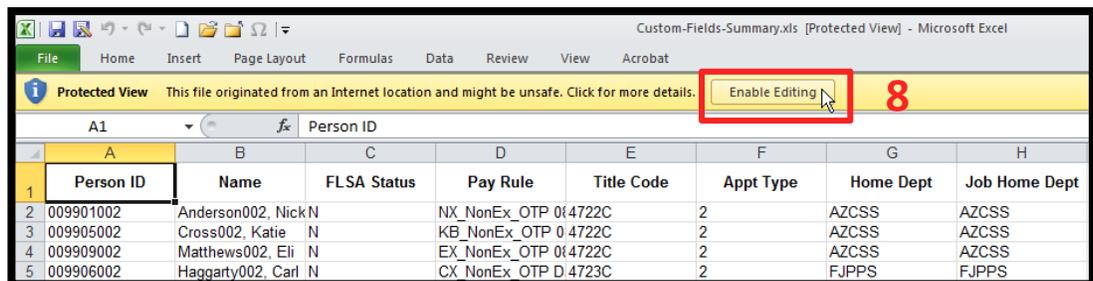
- From the **Select an Action** drop list, choose **Export to Excel**.



- Respond to the following dialog window by clicking **Open**.

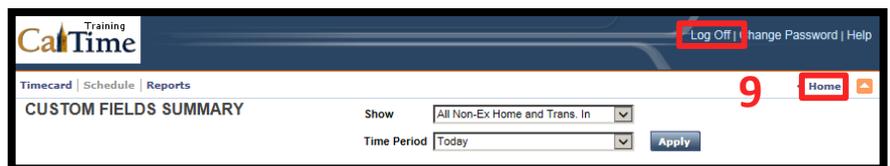


- To save, print, or edit the *Excel* file, click **Enable Editing**.



When done, close Excel and return to CalTime.

- Click **Home** to return to access to the **Genies and Reports**, or click **Log Off** to end your CalTime session.



Pay Codes

Vacation Leave Taken
 Sick Leave Taken
 Alternate Holiday Taken
 Bereavement – Sick Leave Taken
 Callback Worked*
 Comp Time Off
 Court Time Worked
 ERIT – Empl. Reduction In Time
 FLMA – LWOP
 FMLA – Sick
 FMLA – Vacation
 Jury Duty
 Leave without Pay
 Military Leave Not Paid
 Military Leave Paid
 Professional Development*
 PTO Taken*
 Shift Diff Lead*
 Time On Call Restricted
 Time On Call Unrestricted
 Travel Time Worked
 Union Business Leave
 Workers' Comp-Sick
 Workers' Comp-Vacation
 *N/A for Library leave-reporting

- Select a Pay Code from the drop-down menu and enter your hours in the corresponding Amount field.

TIMECARD

Person & Id Cross001, Katie (009905001)

Time Period

Timecard successfully saved on: 6/18/2014 5:20PM

<input type="button" value="Save"/> <input type="button" value="Approve"/> <input type="button" value="Comments"/> <input type="button" value="Primary Account"/> <input type="button" value="Totals Summary"/> <input type="button" value="Refresh"/>					
Add Row	Date	Pay Code	Amount	In	Transfer
	Sun 6/08	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Mon 6/09	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Tue 6/10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Wed 6/11	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Thu 6/12	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Fri 6/13	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Sat 6/14	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Sun 6/15	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Mon 6/16	<input type="text" value="Vacation Leave Taken"/>	<input type="text" value="8:00"/>	<input type="text"/>	<input type="text"/>
	Tue 6/17	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Wed 6/18	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Thu 6/19	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

<input type="button" value="Save"/> <input type="button" value="Approve"/> <input type="button" value="Comments"/> <input type="button" value="Primary Account"/> <input type="button" value="Totals Summary"/> <input type="button" value="Refresh"/>					
Add Row	Date	Pay Code	Amount	In	Transfer
	Sun 6/08	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Mon 6/09	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Tue 6/10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Wed 6/11	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Thu 6/12	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Fri 6/13	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Sat 6/14	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Sun 6/15	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Mon 6/16	<input type="text" value="Vacation Leave Taken"/>	<input type="text" value="8:00"/>	<input type="text"/>	<input type="text"/>
	Tue 6/17	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Alternate Lunch Break

Meal deductions are built into CalTime. Each non-exempt employee profile is set up with a 30-minute or 60-minute automatic meal deduction, so if the employee works a regular shift they do not have to clock out for lunch.

TIMECARD

Person & Id Truppi, Danielle N (012345678)

Time Period Current Pay Period 10/12/2014 - 10/25/2014

Timecard successfully saved on: 10/24/2014 1:41PM

Save Approve Comments → Primary Account Totals Summary Refresh

Add Row	Date	Pay Code	Amount	In	Transfer	Out	Totals	
							Shift	Daily
	Sun 10/12							
	Mon 10/13			8:00AM		4:30PM	8.0	8.0
	Tue 10/14			8:00AM		5:00PM	8.5	8.5
	Wed 10/15			8:00AM		12:00PM		
	Wed 10/15			1:00PM		5:00PM	8.0	8.0
	Thu 10/16							
	Fri 10/17							
	Sat 10/18							
	Sun 10/19							
	Mon 10/20							
	Tue 10/21							
	Wed 10/22							
	Thu 10/23							
	Fri 10/24							
	Sat 10/25							
							Total:	24.5

For example, if the employee usually works 8-4:30 with a 30-minute lunch, they will enter an 8:00AM In Punch and a 4:30PM Out Punch, and the system will subtract 30 minutes from the total hours for that day.

If the employee receives approval from their supervisor to take an hour lunch one day, they will NOT enter an 8:00AM to 5:00PM shift, because the system will only subtract 30 minutes, leaving the employee with 8.5 hours in their timecard for that day.

To accommodate alternative lunch breaks, the employee will need to clock out for lunch and clock back in to avoid the automatic deduction. When clocking back in, they will add an extra row using the button to the left.

Enter Leave:

- 1** Select **My Timecard**.
- 2** Ensure the **Time Period** field is correct.
 - **Current Pay Period** if entering leave during the month
 - **Previous Pay Period** if entering leave on the 1st of the next month

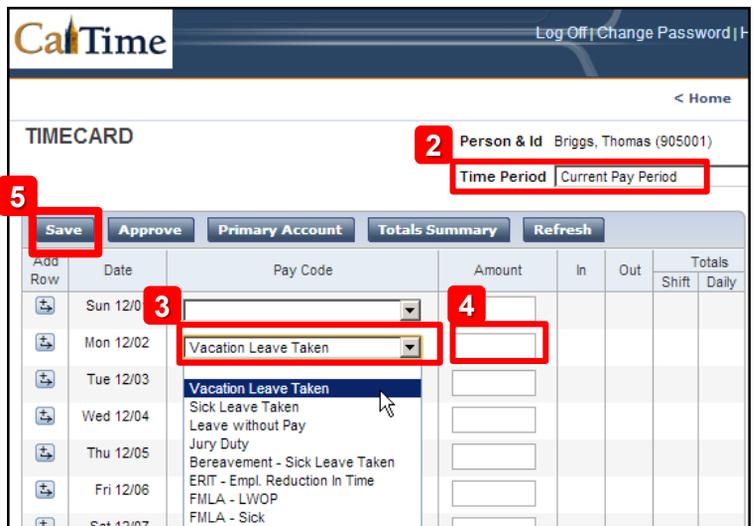
For each day leave was taken, select the **Pay Code** and enter hours as follows:

- 3** Select the correct **Pay Code** from the drop-down menu.
- 4** Type the number of hours in the **Amount** field.
- 5** Click **Save**.

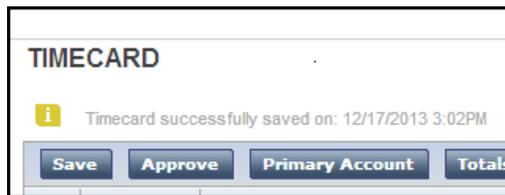
NOTE: CalTime displays a warning above the **Save** button when you do not have enough leave to take.



OR



After you have saved, the word "TIMECARD" turns from orange to black, and a time-stamped confirmation message appears.



Approve Your Timecard:

- 6** Click the **Approve** button.

Note: You must approve your timecard by the first of the month following the pay period, even if you have no leave to report.



After you have approved, the timecard appearance changes to read-only, and a date-stamped confirmation message appears.

TIMECARD Person & Id Briggs, Thomas (905001)
Time Period Current Pay Period

Approvals:
i Timecard Approval by Employee (tbriggs001): 12/31/2013

Remove Approval Primary Account Totals Summary Refresh

Add Row	Date	Pay Code	Amount	In	Out	Totals	
						Shift	Daily
	Sun 12/01						
	Mon 12/02	Vacation Leave Taken	8.0				8.0
	Tue 12/03	Vacation Leave Taken	8.0				8.0
	Wed 12/04						
	Thu 12/05						

If you need to edit your timecard for any reason, you must first remove approval.

To Remove Approval:

- 7 Click the **Remove Approval** Button.

Note: You can not edit your timecard after it's approved by your Supervisor. If necessary, ask your Supervisor to remove his/her approval, remove your approval, then follow steps 3 – 5 above.

TIMECARD Person & Id Briggs, Thomas (905001)
Time Period Current Pay Period

Approvals:
i Timecard Approval by Employee (tbriggs001): 12/31/2013

Remove Approval Primary Account Totals Summary Refresh

Add Row	Date	Pay Code	Amount	In	Out	Totals	
						Shift	Daily
	Sun 12/01						
	Mon 12/02	Vacation Leave Taken	8.0				8.0
	Tue 12/03	Vacation Leave Taken	8.0				8.0
	Wed 12/04						
	Thu 12/05						

At any time, click the **Home** link in the upper-right corner of the page, to return to the main menu.

< Home

Person & Id Carter, Rick 908005 4 of 4

Time Period Previous Pay Period 11/01/2013 - 11/30/2013

Log Out of CalTime:

For PC and Mac users:

- 8 Click the **Log Off** link at the top-right of the application window.

CalTime 8 Log Off | Change Password | Help

< Home

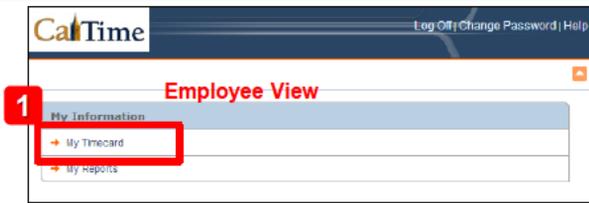
Enter Leave:

- 1 Select My Timecard.
- 2 Ensure the Time Period field is correct.
 - Current Pay Period if entering leave during the month
 - Previous Pay Period if entering leave on the 1st of the next month

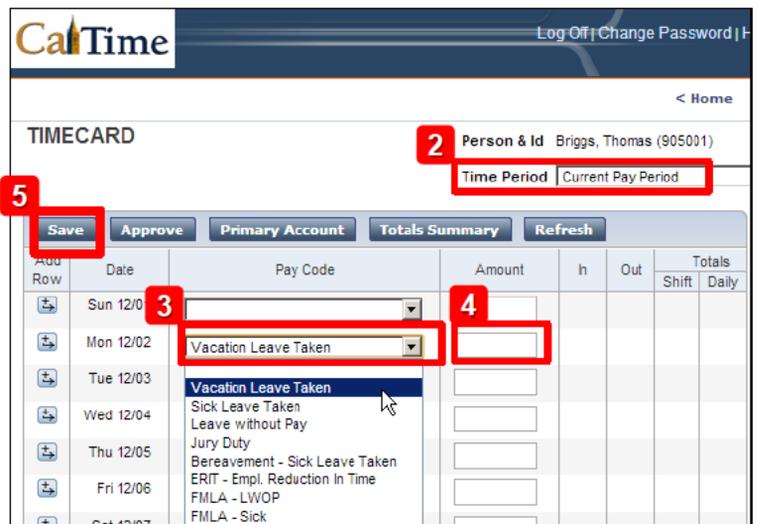
For each day leave was taken, select the Pay Code and enter hours as follows:

- 3 Select the correct Pay Code from the drop-down menu.
- 4 Type the number of hours in the Amount field.
- 5 Click Save.

NOTE: CalTime displays a warning above the Save button when you do not have enough leave to take.



OR



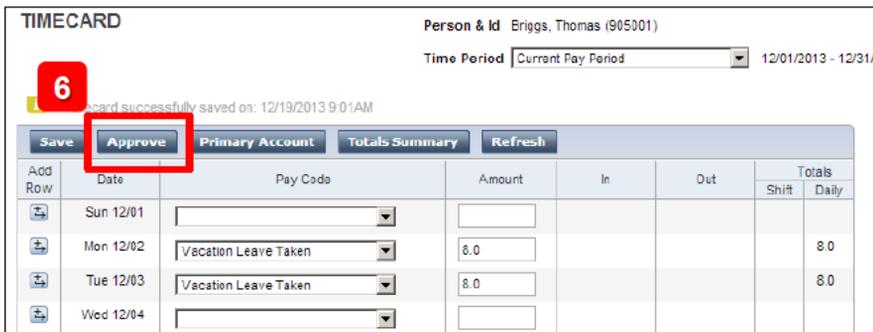
After you have saved, the word "TIMECARD" turns from orange to black, and a time-stamped confirmation message appears.



Approve Your Timecard:

- 6 Click the Approve button.

Note: You must approve your timecard by the first of the month following the pay period, even if you have no leave to report.



After you have approved, the timecard appearance changes to read-only, and a date-stamped confirmation message appears.

TIMECARD Person & Id Briggs, Thomas (905001)

Time Period

Approvals:
1 Timecard Approval by Employee (tbriggs001): 12/31/2013

Remove Approval
Primary Account
Totals Summary
Refresh

Add Row	Date	Pay Code	Amount	In	Out	Totals	
						Shift	Daily
	Sun 12/01						
	Mon 12/02	Vacation Leave Taken	8.0				8.0
	Tue 12/03	Vacation Leave Taken	8.0				8.0
	Wed 12/04						
	Thu 12/05						

If you need to edit your timecard for any reason, you must first remove approval.

To Remove Approval:

- 7 Click the **Remove Approval** Button.

Note: You can not edit your timecard after it's approved by your Supervisor. If necessary, ask your Supervisor to remove his/her approval, remove your approval, then follow steps 3 – 5 above.

TIMECARD Person & Id Briggs, Thomas (905001)

Time Period

Approvals:
1 Timecard Approval by Employee (tbriggs001): 12/31/2013

Remove Approval
Primary Account
Totals Summary
Refresh

Add Row	Date	Pay Code	Amount	In	Out	Totals	
						Shift	Daily
	Sun 12/01						
	Mon 12/02	Vacation Leave Taken	8.0				8.0
	Tue 12/03	Vacation Leave Taken	8.0				8.0
	Wed 12/04						
	Thu 12/05						

At any time, click the **Home** link in the upper-right corner of the page, to return to the main menu.

< Home

Person & Id 4 of 4

Time Period

Log Out of CalTime:

For PC and Mac users:

- 8 Click the **Log Off** link at the top-right of the application window.

8
Log Off | [Change Password](#) | [Help](#)

< Home

Real-Time Reporting

Components of the CalTime Terminal

1. **Badge Reader** – Employee swipes their Cal1 Card through the badge reader to punch in and out, as well as to authenticate themselves for other actions.

2. **Indicator Lights** – Indicator light will flash to green to indicate that the card was read successfully. The light will flash red if the card read is unsuccessful.

3. **Soft Keys** – Touch the icon on the screen to view information:

- **View My Timecard** - Displays time and leave entered on your timecard, as wells as job transfers
- **View My Schedule** - Displays your schedule, including start and end times for upcoming shifts. *Note:* Not all employees have schedules. Creation of schedules is a departmental decision.
- **View My Total Hours** - Provides a summary of the various hours worked (Regular Time, Overtime, Shift Differential)
- **View My Leave Balances** - Displays totals of accrued leave balances (Vacation, Sick, Comp Time, etc.)
- **Transfer** – Used to transfer your time entered to another job (if you have more than one), contract or grant.
- **Type S Transfer (only available to specific departments)** – *Will not be used.*
- **Approve My Timecard** - *Will not be used.*

4. **Home Button** – Use to return to the main terminal screen shown above.

5. **Languages** – Allows you to display information in other languages. Supported languages include English, Spanish, Cantonese, and Mandarin.

Reporting Leave

1. Log-in at a PC into CalTime and select My Timecard

The screenshot shows the CalTime dashboard with a dark blue header containing the logo and 'Log Off | Help' link. Below the header are two main sections: 'My Information' and 'My Links'. In the 'My Information' section, 'My Timecard' is highlighted with a blue arrow pointing to it. In the 'My Links' section, there are two links: 'RDP Aid Enter Leave & Approve' and 'Web Aid Enter Leave & Approve'.

2. Select the appropriate Pay Code from the drop-down menu, and enter your hours in the corresponding Amount field.

The screenshot shows the 'TIMECARD' entry screen. At the top, it displays 'Person & Id Employee, Library (012345678)' and 'Time Period Current Pay Period 10/12/2014 - 10/25/2014'. Below this are several tabs: 'Save', 'Approve', 'Comments', 'Primary Account', 'Totals Summary', and 'Refresh'. The main area is a table with columns for 'Add Row', 'Date', 'Pay Code', 'Amount', 'In', 'Transfer', 'Out', 'Shift', and 'Totals' (subdivided into 'Daily' and 'Total'). A blue arrow points to the 'Amount' field for the row dated 'Tue 10/21', which has 'Vacation Leave Taken' selected in the 'Pay Code' dropdown and '8.0' entered in the 'Amount' field.

Add Row	Date	Pay Code	Amount	In	Transfer	Out	Totals		
							Shift	Daily	
	Sun 10/12								
	Mon 10/13								
	Tue 10/14								
	Wed 10/15								
	Thu 10/16								
	Fri 10/17								
	Sat 10/18								
	Sun 10/19								
	Mon 10/20								
	Tue 10/21	Vacation Leave Taken	8.0					8.0	
	Wed 10/22			7:30AM		4:00PM	8.0	8.0	
	Thu 10/23			7:37AM		4:00PM	8.0	8.0	
	Fri 10/24			7:30AM		4:00PM	8.0	8.0	
	Sat 10/25								
							Total	32.0	

3. After reviewing your timecard, click Save and Approve.

This screenshot is identical to the previous one, but with blue arrows pointing to the 'Save' and 'Approve' buttons in the top navigation bar of the timecard entry screen.

Student Supervisors

Components of the CalTime Terminal



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2. **Indicator Lights** – Indicator light will flash to green to indicate that the card was read successfully. The light will flash red if the card read is unsuccessful.
3. **Soft Keys** – Touch the icon on the screen to view information:
 - **View My Timecard** - Displays time and leave entered on your timecard, as wells as job transfers
 - **View My Schedule** - Displays your schedule, including start and end times for upcoming shifts. *Note:* Not all employees have schedules. Creation of schedules is a departmental decision.
 - **View My Total Hours** - Provides a summary of the various hours worked (Regular Time, Overtime, Shift Differential)
 - **View My Leave Balances** - Displays totals of accrued leave balances (Vacation, Sick, Comp Time, etc.)
 - **Transfer** – Used to transfer your time entered to another job (if you have more than one), contract or grant.
 - **Type S Transfer (only available to specific departments)** – *Will not be used.*
 - **Approve My Timecard** - *Will not be used.*
4. **Home Button** – Use to return to the main terminal screen shown above.
5. **Languages** – Allows you to display information in other languages. Supported languages include English, Spanish, Cantonese, and Mandarin.

Time Entry

Student Employee Recording a Punch



ALERT:

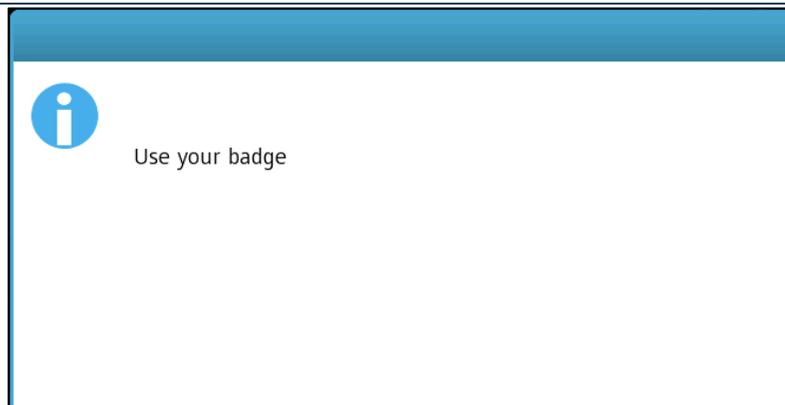
ALL student employees must select a Friendly Name transfer when they clock in at a terminal or PC, even if the student only works one job.

Entering Time at the Terminals

1. Press the **Standard Transfer** soft key.

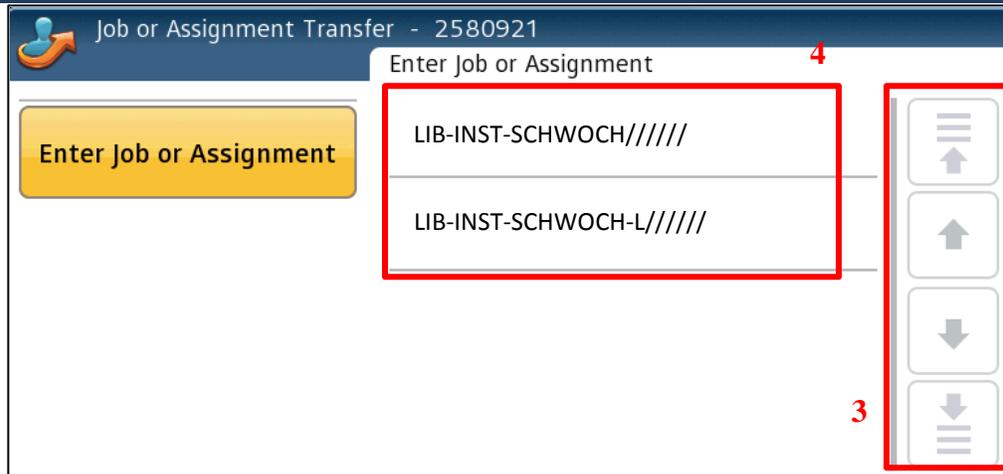


2. CalTime will instruct you to **Use your badge**.
3. Swipe you ID Card.

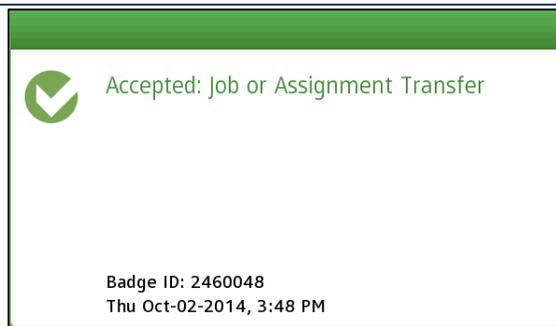


Entering Time at the Terminals

4. Students will only see friendly names linked to their account in the HR system. A student with one job that is eligible for the higher rate will see two friendly names. When clocking in, the student will select the friendly name that DOES NOT end with an -L. Friendly names that end in -L are used by supervisors in the students' timecards to assign the Workleader Rate.

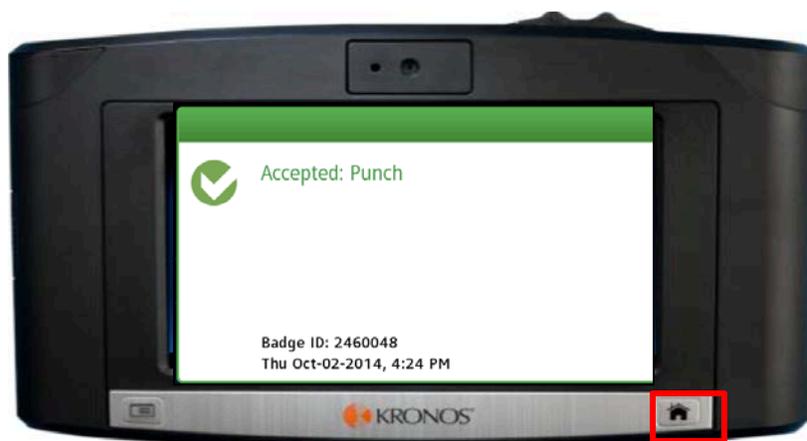


5. CalTime displays a message "Accepted: Job or Assignment Transfer."



Other Actions:

- To punch out of the job, you can simply swipe you badge.
- To punch into a different job, repeat the Standard Transfer steps.
- Press the **Home** key to return to the main menu.





Rounding and Grace Periods for Time Entered

For start and end of each day/shifts, all time stamps collected via CalTime are rounded according to a seven-minute grace period before and after each quarter hour mark. The grace period is 7 minutes before the quarter hour and 7 minutes after the quarter hour.

Examples:

If an employee punches in at 7:23am, the system records and displays the time in CalTime as 7:23am, but for the purposes of calculating the number of hours to be paid, the system will round the time (internally) to 7:30am. Similarly, if an employee punches out at 4:05pm, the system records and displays 4:05pm but will round the time internally to 4:00pm.

Here's a chart of how rounding and the grace period will be applied:

Grace Period (Punch in or out time)	Quarter Hour (Time Used to Calculate Pay)
:53 to :07 (e.g., 6:53am to 7:07am)	00 (e.g., 7:00am)
:08 to :22 (e.g., 7:08am to 7:22am)	15 (e.g., 7:15am)
:23 to :37 (e.g., 7:23am to 7:37am)	30 (e.g., 7:30am)
:38 to :52 (e.g., 7:38am to 7:52am)	45 (e.g., 7:45am)