



# KWANTLEN POLYTECHNIC UNIVERSITY

## Web Timesheet Approval Instructions

This guide provides time sheet approver and proxy with information needed to approve and process timesheets submitted using Self-Service.

### Hours to Report and Frequency of Submission:

| Employee Type                 | Hours to Report | Frequency of Submission  |
|-------------------------------|-----------------|--|
| Regular Employee              | Exceptions only | <u>MUST</u> submit a timesheet every pay period. If there is no exception to report, <u>MUST</u> submit a blank timesheet. |
| Posted/On-call Auxiliary      | ALL hours       | Submit <u>ONLY</u> when there are hours to report.   |
| Student Assistant/Coop        |                 |  |
| Casual Services Contract      |                 |  |
| Time Sheeted Faculty Contract |                 |  |

### Deadlines and Reminder Emails:


| Event                                      | Event Date/time  |  |
|--|--|--|
|  | Normal Pay Period  | Pay Period with Statutory Holiday                          |
| 1 <sup>st</sup> reminder email to employee | 1 <sup>st</sup> Monday                                   | 1 <sup>st</sup> Monday                                     |
| 2 <sup>nd</sup> reminder email to employee | 2 <sup>nd</sup> Wednesday                                | 2 <sup>nd</sup> Tuesday                                    |
| 3 <sup>rd</sup> reminder email to employee | 2 <sup>nd</sup> Friday                                   | 2 <sup>nd</sup> Thursday                                   |
| Time sheet submission deadline             | <b>11:00 am of the 2<sup>nd</sup> Friday cutoff week</b> | <b>11:00 am of the 2<sup>nd</sup> Thursday cutoff week</b> |
| 1 <sup>st</sup> reminder email to approver | 2 <sup>nd</sup> Thursday                                 | 2 <sup>nd</sup> Monday                                     |
| 2 <sup>nd</sup> reminder email to approver | 2 <sup>nd</sup> Friday                                   | 2 <sup>nd</sup> Tuesday                                    |
| Final reminder email to approver & proxies | 2 <sup>nd</sup> Sunday                                   | 2 <sup>nd</sup> Thursday                                   |
| Time sheet approval deadline               | <b>11:59 pm of the 2<sup>nd</sup> Sunday</b>             | <b>11:59 pm of the 2<sup>nd</sup> Thursday</b>             |

**\*\*** Submission and approval deadlines are different during the month of December or other pay period stated, please refer to the Payroll announcement for details.

### Contact:

| Problems/Questions                               | Department       | Contact Person   |
|--|------------------|--|
| Missing or incorrect position                    | Human Resources  | Ju Hee Kim, HRIS Administrator<br>Darlene Hodgson, Manager, Employee Services and HRIS   |
| Incorrect approver                               |                  |  |
| Errors encountered during submission or approval |                  |  |
| Missing earnings                                 | Payroll Services | Glenda Sundquist, Team Lead – Administration & Casual Services Contract<br>Kathleen Scallion, Team Lead – NR1 Faculty<br>Kerry Targett, Payroll Officer – Regular Faculty, NR2 Faculty<br>Augusta Odoom, Payroll Officer – (N-Z) Regular & Auxiliary BCGEU and Student Assistants/Coop<br>Eden de la Rama, Payroll Officer – (A-M) Regular & Auxiliary BCGEU and Student Assistants/Coop |
| How to report earnings or hours                  |                  |  |
| Missed timesheet submission or approval deadline |                  | Iuliana Gafincu, Operations Manager, Payroll Services  |
| Online Self-Service access                       | IT Service       | (604) 599-2116   |

## Web Timesheet Approval Steps for Approver

| Step | Instructions   | Screenshot  |
|------|--|---|
| 1    | <p><u>Web Time Sheet Approval Reminder Email</u></p> <p>Sign in using the link provided in the email. You may also save this link to your Favourites.</p>  | <p><b>Subject: Web Time Sheet Approval Deadline</b></p> <p>Hello,</p> <p>This is to remind you that web time sheet for pay period 4 of 2017 require approval by 12-Feb-2017 11:59 pm.</p> <p>Your Employee ID (User ID) is 999999999</p> <p>Online Self-Service Login URL is <a href="https://kpu.ca/oss">https://kpu.ca/oss</a></p>  |
| 2    | <p><u>Self-Service Login</u></p> <p>Please use your employee ID to access Self Service. If you have never logged in, your password will be your birthday formatted as: ddMonYYYY</p>                                   | <p>❓ If you have forgotten your PIN, you can reset it by entering your USER ID and clicking the "Forgot PIN?" button.</p> <p>USER ID: <input type="text"/></p> <p>PIN: <input type="text"/></p> <p><input type="button" value="Login"/> <input <="" p="" type="button" value="Forgot PIN?"/> </p>   |
| 3    | <p><u>Select Menu</u></p> <p>Select the <b>Employee Menu</b></p>   |   |
| 4    | <p><u>Select Time Sheet</u></p>  | <p><b>Time Sheet</b></p> <p>Leave Report</p> <p>Benefits and Deductions</p> <p>Pay Information</p> <p>Tax Forms</p> <p>Leave Balances (Vacation, etc)</p>   |
| 4.1  | Select the <b>Time Sheet</b> option  |   |
| 4.2  | Select the <b>Approve or Acknowledge Time</b> radio button and press <b>Select</b> .   | <p>Selection Criteria</p> <p><input checked="" type="radio"/> My Choice</p> <p>Access my Time Sheet: <input type="radio"/></p> <p>Access my Leave Report: <input type="radio"/></p> <p>Approve or Acknowledge Time: <input checked="" type="radio"/></p> <p>Act as Proxy: <input type="text" value="Self"/></p> <p>Act as Superuser: <input type="checkbox"/></p> <p><input type="button" value="Select"/></p>  |
| 5    | <p><u>Select Department and Pay Period</u></p> <p>Click on the <b>My Choice</b> radio button to select the appropriate <b>Department</b> and <b>Pay Period</b> and then press <b>Select</b> to approve time sheet.</p> | <p><b>Approver Selection</b></p> <hr/> <p>Time Sheet</p> <p><b>Department and Description My Choice Pay Period</b></p> <p>1, 8121PR, Finance - Payroll <input checked="" type="radio"/> <input type="text" value="2017 BW 4, Jan 29, 2017 to Feb 11, 2017"/></p> <p>Sort Order</p> <p><input checked="" type="radio"/> My Choice</p> <p>Sort employees' records by Status then by Name: <input checked="" type="radio"/></p> <p>Sort employees' records by Name: <input type="radio"/></p> <p><input type="button" value="Select"/></p> |

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Time Sheets by Status then by Name Display

6.1

Timesheets are displayed by status (Pending, In Progress and Not Started) and then by Name.

6.2

Click on the name hyperlink (in Pending section) to approve timesheet(s).

COA:

1, Kwantlen Polytechnic University

Department:

8121PR, Finance - Payroll

Pay Period:

2017 BW 4, Jan 29, 2017 to Feb 11, 2017

Act as Proxy:

Not Applicable

Pay Period Time Entry Status:

Open until Feb 12, 2017, 11:59 PM

Change Selection

Select All, Approve or FYI

Reset

Save

Pending

| ID                        | Name, Position and Title   | Required Action | Total Hours | Total Units | Queue Status |
|---------------------------|--|-----------------|-------------|-------------|--------------|
| <a href="#">968762-00</a> | <a href="#">Kathleen O'Sullivan</a><br>968762 - 00<br>Payroll Services Team Lead | Approve         | 2.00        | .00         |              |
| <a href="#">988559-00</a> | <a href="#">Glenda Carvalheiro</a><br>988559 - 00<br>Payroll Services Team Lead  | Approve         | 7.00        | .00         |              |

In Progress

| ID                        | Name, Position and Title  | Total Hours | Total |
|---------------------------|---|-------------|-------|
| <a href="#">968815-00</a> | <a href="#">Eden de la Rama</a><br>968815 - 00<br>Payroll Officer |             | .00   |

Not Started

| ID                        | Name, Position and Title  |
|---------------------------|---|
| <a href="#">987905-00</a> | <a href="#">Augusta O'Sullivan</a><br>987905 - 00<br>Senior Payroll Officer |
| <a href="#">987904-00</a> | <a href="#">Kerry Farrell</a><br>987904 - 00<br>Senior Payroll Officer      |

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Information Displayed on Timesheet

7.1

Header Table - Employee ID, Name, Job Title, Department and Transaction Status

7.2

Time Sheet – Earnings, Date and Hours

7.3

Comments – Employee's or Approver's Comments

7.4

Routing Queue – Creation, Submission and Approval information

7.5

Account Distribution Default Data – default labour distribution information

Employee ID and Name:

[968762-00 Kathleen O'Sullivan](#)

Department and Description:

1 8121PR Finance - Payroll

Title:

968762-00 Payroll Services Team Lead

Transaction Status:

Pending

Time Sheet

| Earnings                    | Shift/Special Rate | Total Hours | Total Units | Sunday Jan 29, 2017 | Monday Jan 30, 2017 | Tuesday Jan 31, 2017 | Wednesday Feb 01, 2017 | Thursday Feb 02, 2017 | Friday Feb 03, 2017 | Saturday Feb 04, 2017 | Sunday Feb 05, 2017 | Monday Feb 06, 2017 | Tuesday Feb 07, 2017 | Wednesday Feb 08, 2017 | Thursday Feb 09, 2017 | Friday Feb 10, 2017 | Saturday Feb 11, 2017 |
|-----------------------------|--------------------|-------------|-------------|---------------------|---------------------|----------------------|------------------------|-----------------------|---------------------|-----------------------|---------------------|---------------------|----------------------|------------------------|-----------------------|---------------------|-----------------------|
| Medical/Dental Appointments | 1                  |             | 2           |                     |                     | 2                    |                        |                       |                     |                       |                     |                     |                      |                        |                       |                     |                       |
| Total Hours:                |                    | 2           |             |                     |                     | 2                    |                        |                       |                     |                       |                     |                     |                      |                        |                       |                     |                       |
| Total Units:                |                    |             | 0           |                     |                     |                      |                        |                       |                     |                       |                     |                     |                      |                        |                       |                     |                       |

Comments

| Date                  | Made by                             | Confidential | Comments            |
|-----------------------|-------------------------------------|--------------|---------------------|
| Feb 06, 2017 01:53 pm | <a href="#">Kathleen O'Sullivan</a> | No           | Time Sheet Returned |

Note: After submitting the time sheet, you will see '\*\*' beside the **Comments** button if you have added comments for the approver

Routing Queue

| Name                                | Action and Date                  |
|-------------------------------------|----------------------------------|
| <a href="#">Kathleen O'Sullivan</a> | Originated Feb 06, 2017 01:53 pm |
| <a href="#">Kathleen O'Sullivan</a> | Submitted Feb 06, 2017 01:54 pm  |
| <a href="#">Iuliana O'Sullivan</a>  | Pending                          |

Account Distribution Default Data

| Pay Period Effective Date | Percent | Index  | Fund | Organization | Account | Program | Activity | Location |
|---------------------------|---------|--------|------|--------------|---------|---------|----------|----------|
| Jan 29, 2017              | 100.00  | 8121PR | 100  | 8121PR       | 6112    | 921     |          |          |

8 Buttons and Processing Options

[Previous Menu](#) [Approve](#) [Return for Correction](#) [Change Record](#) [Delete](#) [Add Comment](#) [Next](#)

- Return for Correction (the system will notify the employee via email)
- Change Record (approver makes changes to employee's timesheet – must communicate to employee of change – no email notification available)
- Delete (if deleted, the approver must notify the employee to restart and re-submit timesheet - no email notification available)
- Add Comment (for when you intend to return timesheet for correction by employee or when you had changed employee's timesheet)
- Approve (click OK on the pop-up to confirm approval)

Do you want to approve this time transaction?

[OK](#) [Cancel](#)

- Next (process next employee)
- Previous Menu (return to list of timesheets page)

[Previous Menu](#) [Return Time](#) [Next](#)

**Note:** As long as the Transaction Status is “Approved” the approver has the option to “Return Time”, which means that timesheet can be edited, and re-submitted for approval by the employee. If the Transaction Status is “Completed” there is no such option as “Return Time”.

9 Approved Timesheet

- Acknowledgement message
- Transaction Status changed from 'Pending' to 'Approved'
- Approval date & time

Time transaction successfully approved.

Employee ID and Name: 000000006 Kathleen Scallion

Department and Description: 1 8121PR Finance - Payroll

Title: 966762-00 Payroll Services Team Lead

Transaction Status: [Approved](#)

[Previous Menu](#) [Return Time](#) [Next](#)

[Comments](#) | [Routing Queue](#) | [Account Distribution](#)

**Time Sheet**

| Earnings                    | Shift/Special Rate | Total Hours | Total Units | Sunday , Jan 29, 2017 | Monday , Jan 30, 2017 | Tuesday , Jan 31, 2017 | Wednesday , Feb 01, 2017 | Thursday , Feb 02, 2017 | Friday , Feb 03, 2017 | Saturday , Feb 04, 2017 | Sunday , Feb 05, 2017 | Monday , Feb 06, 2017 | Tuesday , Feb 07, 2017 | Wednesday , Feb 08, 2017 | Thursday , Feb 09, 2017 |
|-----------------------------|--------------------|-------------|-------------|-----------------------|-----------------------|------------------------|--------------------------|-------------------------|-----------------------|-------------------------|-----------------------|-----------------------|------------------------|--------------------------|-------------------------|
| Medical/Dental Appointments | 1                  | 2           |             |                       |                       | 2                      |                          |                         |                       |                         |                       |                       |                        |                          |                         |
| <b>Total Hours:</b>         |                    | 2           |             |                       |                       | 2                      |                          |                         |                       |                         |                       |                       |                        |                          |                         |
| <b>Total Units:</b>         |                    |             | 0           |                       |                       |                        |                          |                         |                       |                         |                       |                       |                        |                          |                         |

**Comments**

| Date                  | Made by           | Confidential | Comments            |
|-----------------------|-------------------|--------------|---------------------|
| Feb 06, 2017 01:53 pm | Kathleen Scallion | No           | Time Sheet Returned |


**Routing Queue**

| Name              | Action and Date                  |
|-------------------|----------------------------------|
| Kathleen Scallion | Originated Feb 06, 2017 01:53 pm |
| Kathleen Scallion | Submitted Feb 06, 2017 01:54 pm  |
| Juliana Scallion  | Approved Feb 06, 2017 04:16 pm   |

## Proxy Setup/Removal Steps

| Step | Instructions  | Screenshot   |
|------|---|--|
| 10   | <b>Proxy Setup/Removal</b><br>(Refer to the HR Recommended Proxy Matrix for proxy setup guideline. )  |  |
| 10.1 | Approver selects ' <b>Proxy setup (for Approver Only)</b> ' option from the Employee Menu<br>OR<br>Approver clicks the <b>Proxy Setup</b> link on the Time Reporting Selection page | <p>Time Reporting Selection</p> <p>Quick Guides Link Web Time Entry Quick Guides</p> <p>Selection Criteria</p> <p>My Choices</p> <p>Access my Time Sheet: <input type="radio"/></p> <p>Access my Leave Report: <input type="radio"/></p> <p>Approve or Acknowledge Time: <input type="radio"/></p> <p>Act as Proxy: <input type="radio"/> Self</p> <p>Act as Superuser: <input type="radio"/></p> <p>Select</p> <p>Proxy Set Up</p> <p>Employee Main Menu</p> <p>For Assistance, Contact Human Resources</p> <p>Time Sheet</p> <p>Leave Report</p> <p>Benefits and Deductions</p> <p>Pay Information</p> <p>Tax Forms</p> <p>Leave Balances (Vacation, etc)</p> <p>Credential Information</p> <p>FTE (Faculty)</p> <p>Seniority Hours (BCGEU)</p> <p>Search for Courses</p> <p><b>Proxy Setup (for Approver Only)</b></p> <p>RELEASE: 8.12.1</p> |
| 10.2 | To setup Proxy<br>- Select name of proxy from drop-down list, check the ' <b>Add</b> ' box and click <b>Save</b> . Repeat to setup another proxy.                                   | <p>Proxy Set Up</p> <p>Name</p> <p>Add Remove</p> <p>Vivian</p> <p>Save</p>  |
| 10.3 | To remove Proxy<br>- Check the ' <b>Remove</b> ' box beside the proxy to be removed and click <b>Save</b> .   | <p>Proxy Set Up</p> <p>Name</p> <p>Add Remove</p> <p>Vivian</p> <p>Francis</p> <p>Save</p>   |

## Web Timesheet Approval Steps for Proxy

| Step | Instructions   | Screenshot  |
|------|--|---|
| 11   | <p><u>Web Time Sheet Final Approval Reminder Email</u></p> <p>Proxy signs in using the link provided in the email. You may also save this link to your Favourites.</p>               | <p><b>Subject: Web Time Sheet Approval Deadline Final Reminder to Approver and Proxies</b></p> <p>Hello,</p> <p>This is a final reminder to approve all time sheets for pay period 4 of 2017 by 12-Feb-2017 11:59 pm.</p> <p>Approver: XXXXX XXXX</p> <p>Proxies: XXXXX XXXX, XXXXX XXXX</p> <p>Online Self-Service Login URL is <a href="https://bweb.kwantlen.ca">https://bweb.kwantlen.ca</a></p>  |
| 12   | <p><u>Self-Service Login</u></p> <p>Please use your employee ID to access Self Service. If you have never logged in, your password will be your birthday formatted as: ddMonYYYY</p> | <p>❓ If you have forgotten your PIN, you can reset it by entering your USER ID and clicking the "Forgot PIN?" button.</p> <p>USER ID: <input type="text"/></p> <p>PIN: <input type="text"/></p> <p>Login <input data-bbox="618 663 729 688" type="button" value="Forgot PIN?"/></p>   |
| 13   | <p><u>Select Menu</u></p> <p>Select the <b>Employee Menu</b></p>   |   |
| 14   | <p><u>Proxy to approve Timesheet</u></p>   |   |
| 14.1 | Select the <b>Time Sheet</b> option  | <p><b>Time Sheet</b></p> <p>Leave Report</p> <p>Benefits and Deductions</p> <p>Pay Information</p> <p>Tax Forms</p> <p>Leave Balances (Vacation, etc)</p>   |
| 14.3 | Select the <b>Approve or Acknowledge Time</b> radio button. Click the down-arrow beside <b>Act as Proxy</b> to select the approver you are proxy for and click <b>Select</b> .       | <p>Selection Criteria</p> <p><input checked="" type="radio"/> My Choice</p> <p>Access my Time Sheet: <input type="radio"/></p> <p>Access my Leave Report: <input type="radio"/></p> <p>Approve or Acknowledge Time: <input checked="" type="radio"/></p> <p>Act as Proxy: <input type="text" value="Selena Iuliana"/></p> <p>Act as Superuser: <input type="text" value="Selena Iuliana"/></p> <p><input type="button" value="Self"/></p> <p><input type="button" value="Select"/></p>  |
| 11.4 | The proxy will see what the original approver would see as if they were to approve the timesheet.  | <p>Approver Selection</p> <hr/> <p>Time Sheet</p> <p>Department and Description <input checked="" type="radio"/> My Choice Pay Period</p> <p>1, 8121PR, Finance - Payroll <input checked="" type="radio"/> [2017 BW 4, Jan 29, 2017 to Feb 11, 2017]</p> <p>Sort Order</p> <p><input checked="" type="radio"/> My Choice</p> <p>Sort employees' records by Status then by Name: <input checked="" type="radio"/></p> <p>Sort employees' records by Name: <input type="radio"/></p> <p><input type="button" value="Select"/></p> |

|      |   |  |
|------|---|--|
| 11.5 | Follow 'Timesheet Approval Steps for Approver' Steps 6 to 10 to approve timesheet(s). | <p>Note: If the original approver name does not show up as below when the <b>Act as Proxy</b> radio button is selected, that means the approver has not setup the proxy yet.</p> <p>Selection Criteria</p> <div><div></div><div>My Choice</div></div> <p>Access my Time Sheet: <input type="radio"/></p> <p>Access my Leave Report: <input type="radio"/></p> <p>Approve or Acknowledge Time: <input checked="" type="radio"/></p> <p>Act as Proxy: <div>Self</div></p> <p>Act as Superuser: <div>Self</div></p> <p>Select</p> |
|------|---|--|

## HR Recommended Proxy Matrix

Before the Proxy set-up, the Manager (approver) might want to check with HR and ensure that the Proxy has the proper security/org code set-up as the Approver.

### Recommended Proxies by Employee Contract Type:

| Recommended Proxy Options                             | Admin | BCGEU Staff | BCGEU Auxiliary | NR1 Faculty | Casual Service Contracts* | Student Assistants | Regular Faculty | NR2 Faculty |
|---|-------|-------------|-----------------|-------------|---------------------------|--------------------|-----------------|-------------|
| Another Supervisor within same department             | No    | Yes         | Yes             | No          | No                        | Yes                | N/A             | N/A         |
| One-over-One Manager                                  | Yes   | Yes         | Yes             | Yes         | Yes                       | Yes                | N/A             | N/A         |
| Divisional Business Manager                           | No    | Yes         | Yes             | Yes         | Yes                       | Yes                | N/A             | N/A         |
| Equivalent manager within organization or external to | Yes   | Yes         | Yes             | No          | No                        | No                 | N/A             | N/A         |

\*Casual Service Contracts may be originated and have time approved by a Faculty member for research contracts.