TIM Quick Start Guide for TIM Administrators

Version: 4122024-1.0

UNC | FINANCE AND OPERATIONS
Finance and Budget

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Quick Start Guide

This document provides information on how to log into the Historical TIM and how to navigate and edit timecards and schedules in the updated TIM, so you can get started using it quickly.

Please refer to the TIM Administrator Manual for more comprehensive and detailed instructions on using the updated TIM.

Starting Friday April 12, TIM Administrators will have access to both the Historical TIM and the updated TIM. Please review *Page 2* for specific information about the Historical TIM system.

Data imported into the updated TIM:

- **All accrual balances** as of 4/1/2024 (monthly) and 4/8/2024 (biweekly)
- **Times in and out worked** captured in the historical TIM from Monday April 8 through 6pm on Thursday, April 11

Data not imported into the updated TIM that will need to be added by Managers or TIM Administrators:

- **Times in and out worked during an outage or were missed by Capture employees:**
  - Employees who use Time Clocks: Outage on Thursday, April 11 from 6 to 9 p.m.
  - Employees who Time Stamp on Computer: Outage from 6 p.m. on April 11 until Friday, April 12
- **Transfers to Secondary positions,** ***see Page 25***
- **Transfers to TIM Account codes,** ***see Page 26***
- **Custom schedule patterns assigned to Capture employees,** ***see Page 36***

Employees who enter their time in TIM and all Managers will be able to log into the updated TIM on Monday, April 15 when the updated TIM system goes live.

Historical TIM Access

You can log in to the Historical TIM by going directly to the TIM URL.

You must use the TIM URL

1. Go to https://unctimhist.unc.edu in your browser.
1. Type your Onyen and Onyen password.
2. Click **Sign in**.

Result: The historical TIM application will open.

The Historical TIM includes:

- Time and leave data from the beginning of TIM, 07/01/2007 through 04/07/2024.
- Only employees that were active in ConnectCarolina before 04/03/2024.
- No data may be edited in the historical TIM.
- TIM Administrators can pull up employees and review timecards and accruals.
- TIM Administrators can also run and print reports:
    - **To review punch data imported into updated TIM-**
        - Time Detail (Spreadsheet Export) report from 4/8/24 – 4/11/24.
    - **To review accrual balances imported into updated TIM-**
        - Accrual Detail report with a date range ending 3/31/24 (monthly) or 4/7/24 (biweekly)
- Managers and employees do **not** have access to the historical TIM.

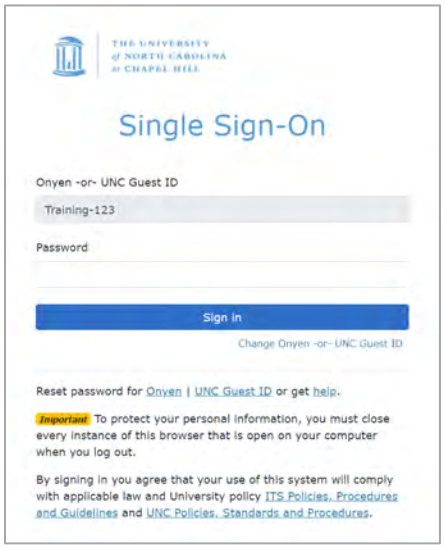
TIM Access

You can log in to the Updated TIM either by going directly to the TIM URL or via ConnectCarolina.

To use the TIM URL

3. Go to https://unctim.unc.edu in your browser.

Result: The standard UNC Single Sign On screen will appear as seen below.



4. Type your Onyen in the Onyen -or- UNC Guest ID field and click **Next**.
5. Type your Onyen password in the Password field.
6. Click **Sign in**.

Result: The TIM application will open.

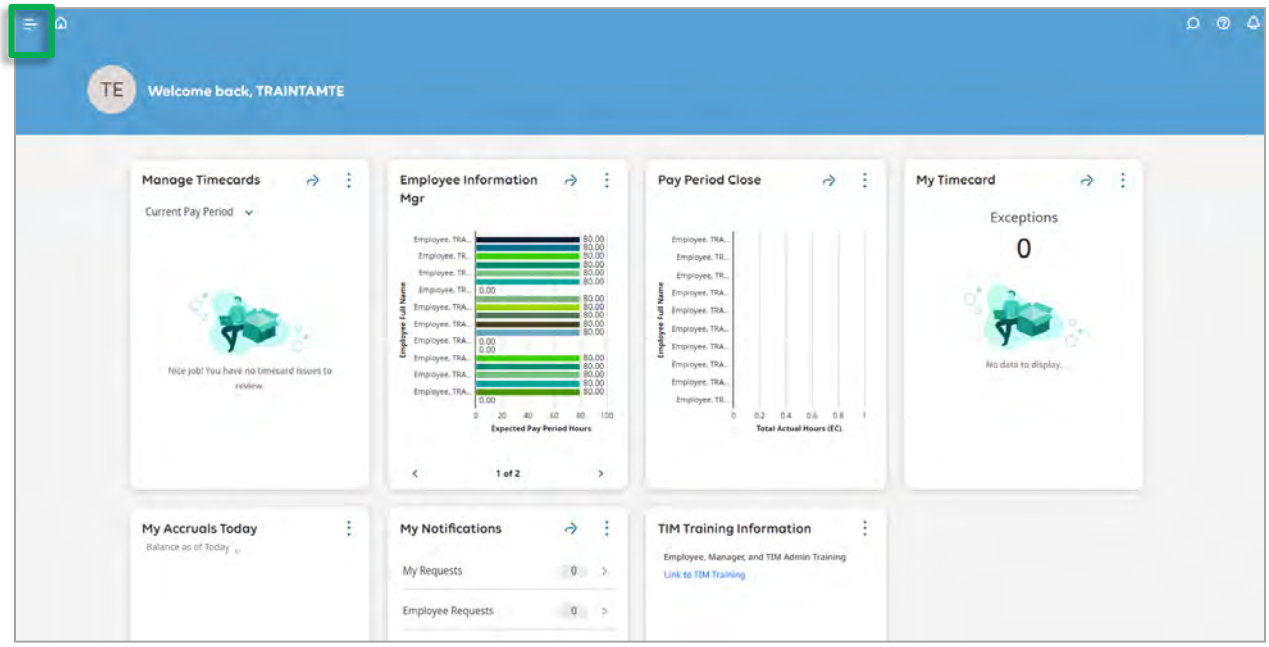
To access via ConnectCarolina

1. Go to https://connectcarolina.unc.edu/.
2. If the UNC Single Sign On screen appears, sign in as described above.
3. From the **Self Service** home page, select **TIM**.

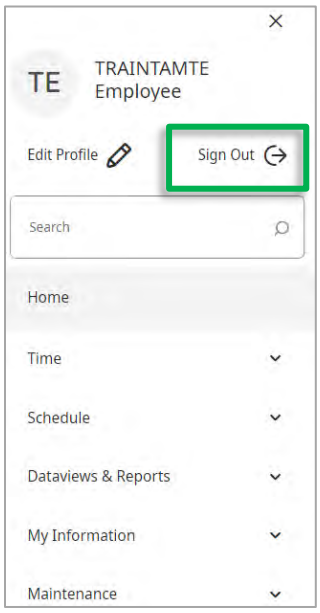
Result: The TIM application will open.

Signing Out of the Updated TIM

1. To sign out securely, click the **Menu bar** in the top left of your screen.



2. Click **Sign Out**.



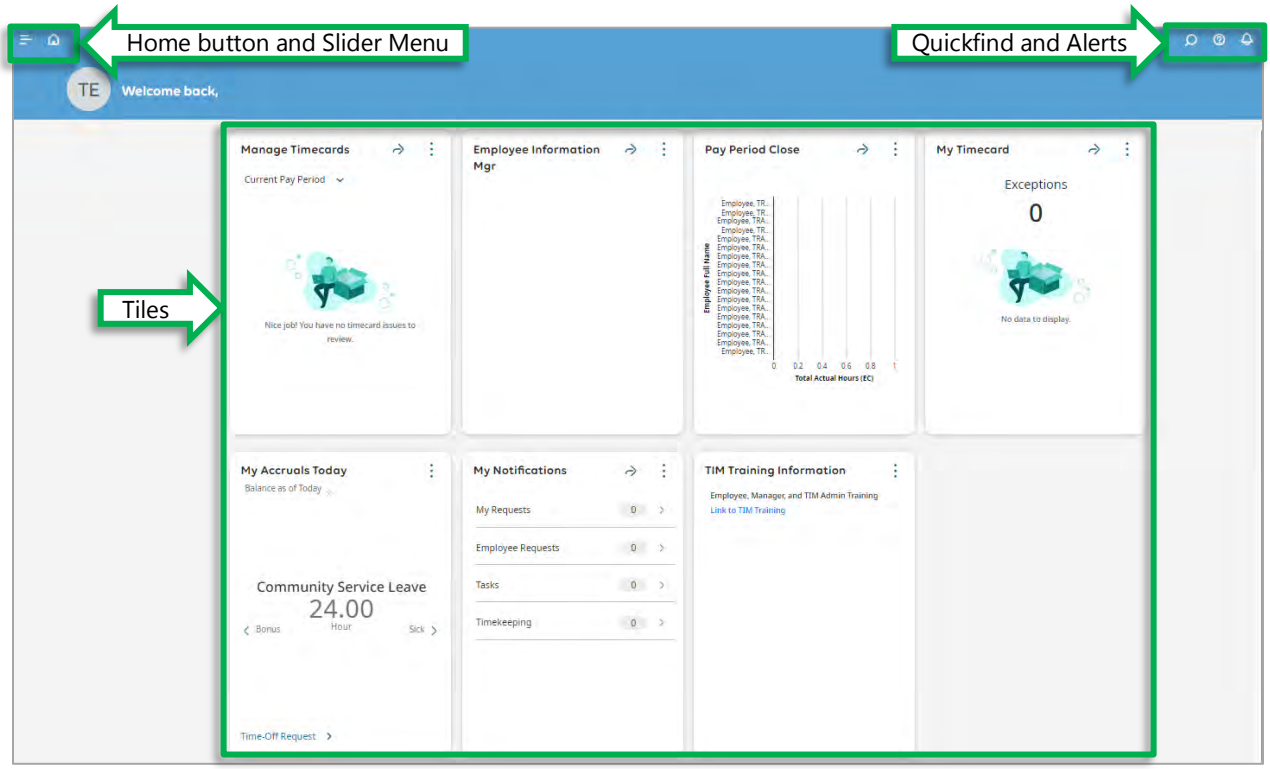
3. After you have signed out of TIM successfully, use the **X button** in the top right corner to close the web browser.

Note: TIM is set to automatically sign out after 30 minutes of inactivity.

TIM Navigation: Home Page

A **TIM Navigation Walkthrough** shows TIM Administrators and Managers how to navigate TIM at Go Live and is posted on the TIM Administrator webpage for your use. You can follow along with the manual, the walkthrough starts here, Navigating the Home Page.

The Home page will display once you have logged in. Highlighted below are areas of the homepage that will be referenced in the following pages of the manual. Be sure to familiarize yourself with these areas.



Home button- Returns users to the homepage within TIM.
Slider Menu- Used for signing out of TIM as well as accessing additional options.

Quickfind- Allows users to search within TIM for specific employees.
Alerts- Shows notifications for employee requests.

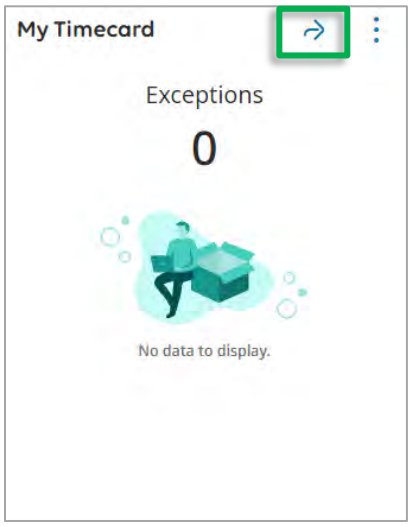
Tiles- Note: These vary based on access.

My Timecard Tile

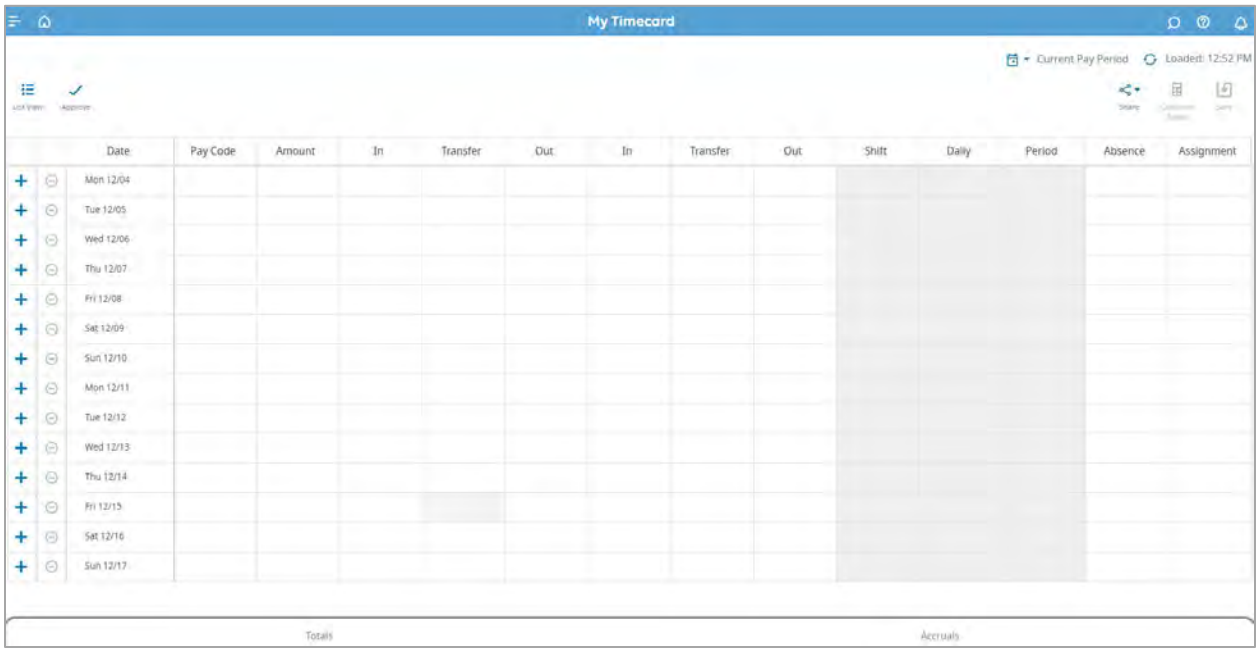
As a TIM Manager or TIM Administrator to access your personal timecard, you will utilize the **My Timecard tile**.

To access your personal timecard:

4. Click the **Open My Timecard arrow** in the My Timecard tile.



Result: Your personal timecard displays.



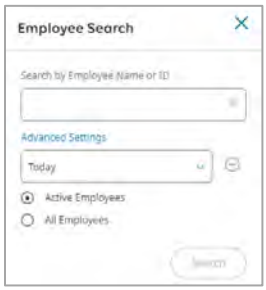
Employee Search

Opening Timecards

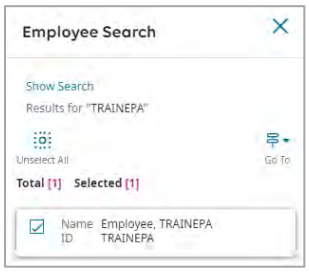
QuickFind- To find an employee in TIM and open their Timecard:

1. Click on the **Magnifying glass icon** in the upper right corner of the homepage to open the Employee Search tab.

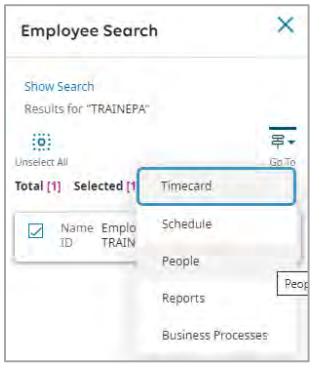
2. In the search bar, type the employee's name or PID. You can also use the Advanced Settings to select "*All Employees*" to include terminated employees.



3. Click **Search**.
4. Select the employee from the displayed results.



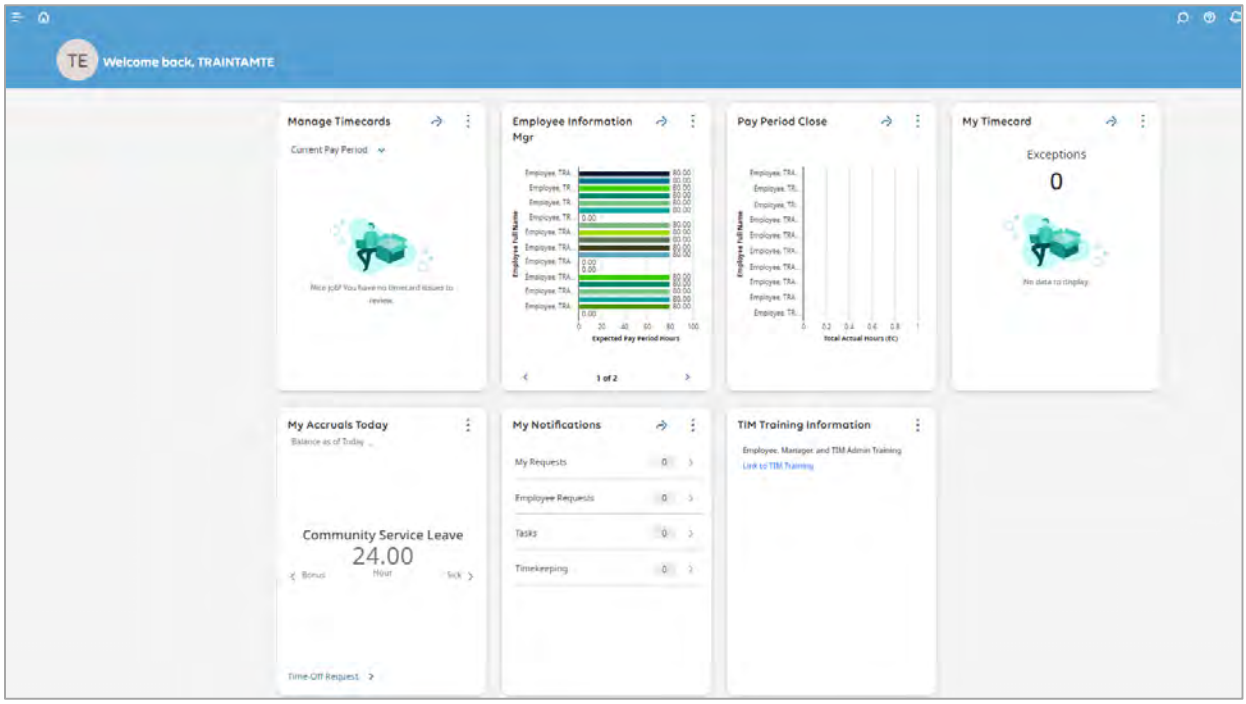
5. Click the **Go To icon** and then select a widget, such as, **Timecard.**



Result: The timecard for the employee opens with today's date. Change the time period to the pay period you need to view.

Home Page Tiles

The **Home Page** displays tiles. A TIM Administrator or Manager will see the following tiles once logged in. To access the information within any of the tiles, you must click the arrow in each tile.



Manage Timecards Tile opens **all** of the timecards for the employees you have access to in TIM. This is **not** recommended for use by TIM Administrators.

Employee Information Tile opens a **dataview** that lists all of your employees in the current pay period and displays detailed information.

Pay Period Close Tile opens a **dataview** that lists all of your biweekly employees in the previous pay period and is used by Managers and TIM Administrators to ensure their biweekly employee's timecards are updated, approved, and then signed off by a TIM Administrator.

My Timecard Tile opens your individual timecard. Please review the TIM employee manual that corresponds with your employee type (e.g. SHRA permanent Exempt) for detailed information about the employee tiles that appear on your home page and how to use them.

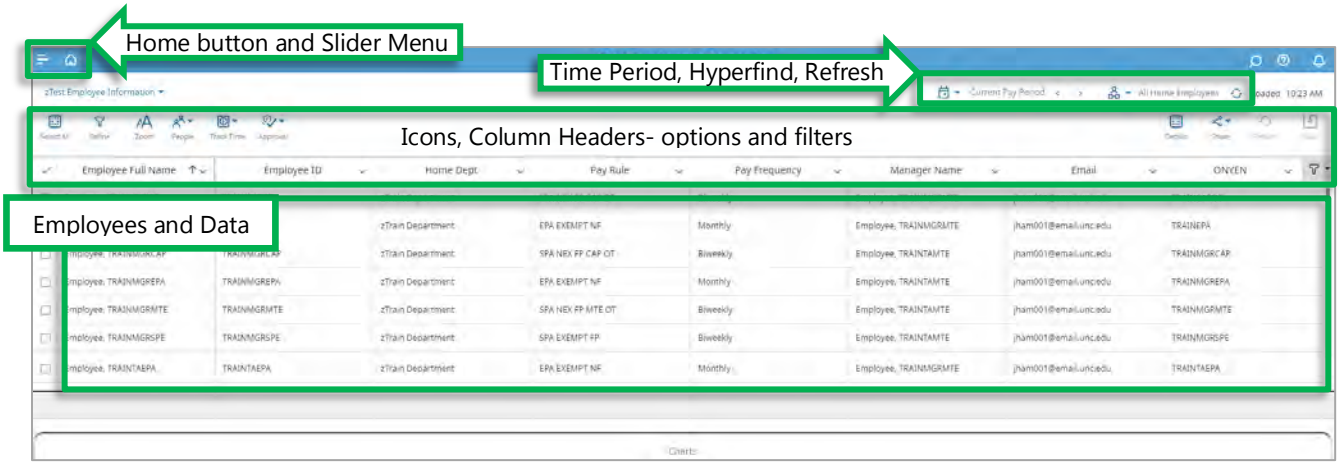
My Notifications Tile is used primarily by Managers and shows if there are any requests, such as employee time off, that have been received.

Employee Information and Pay Period Close Tiles: Navigating Dataviews

A **Dataview (DV)** shows a list of employees in a specified time period with detailed information.

Features of a Dataview

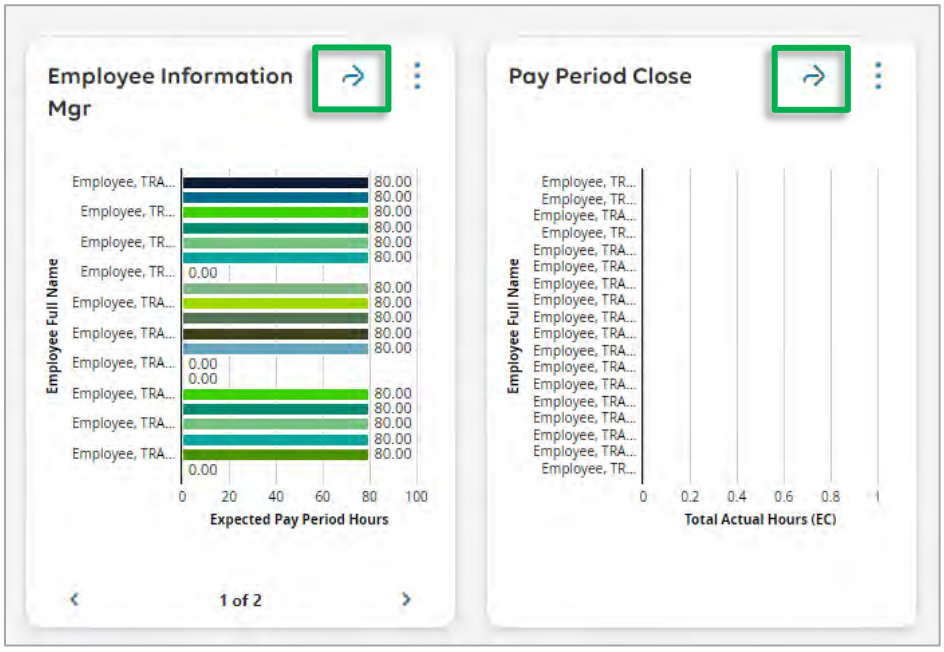
When a Dataview is opened (Employee Information Mgr., Pay Period Close, etc.) you will see the following features.



Opening a Dataview

Dataview tiles provide a snapshot of information. To access the detailed information within the Employee Information or Pay Period Close Dataviews you will need to:

1. Click the **Access Arrow** within the tile.



Result: You can now view detailed information about the employees assigned to you in TIM.

Note: To select a different Dataview or return to the home page, click on the **Home Button** at the top of the screen.

Click on the **Access Arrow** within a tile to open a different dataview.

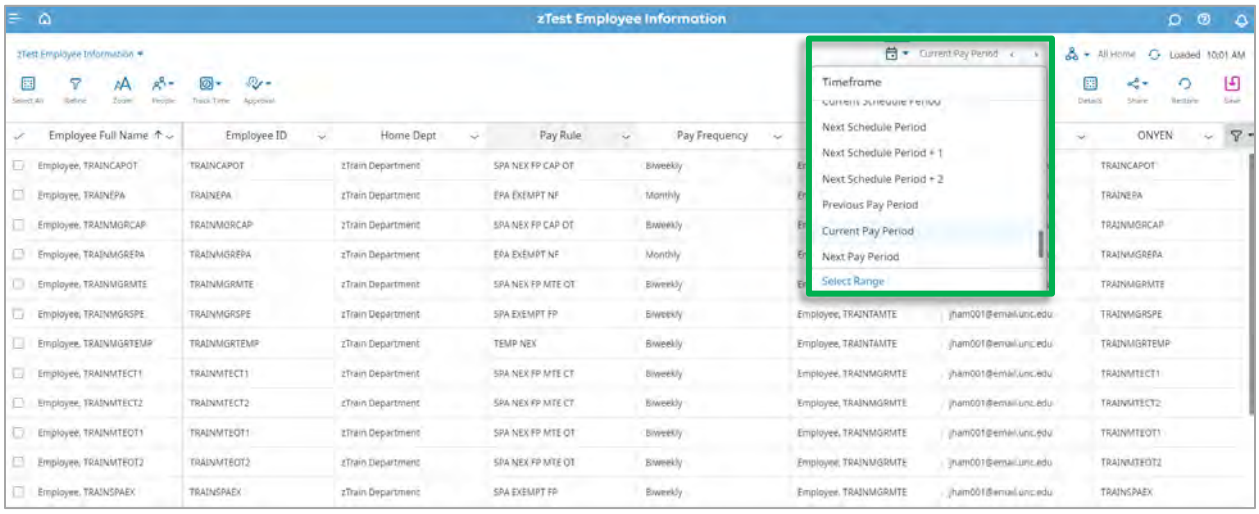
Navigating a Dataview- Time Period, Hyperfind, Refresh

Time Period Dropdown Menu

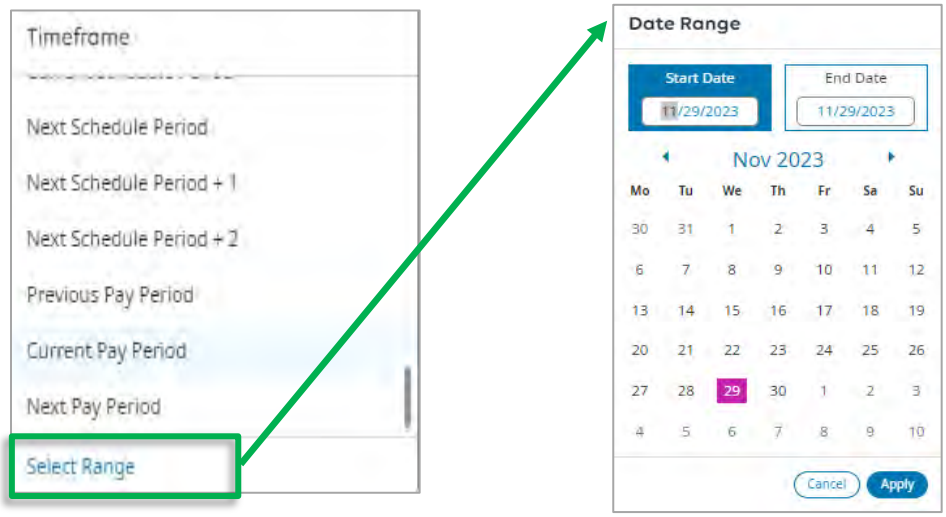
The **Current Pay Period** (Employee Information DV) or **Previous pay period** (Pay Period Close DV) **time period** is automatically selected when opening the dataview.

The **Pay Period Selector** allows you to change the pay period.

Note: It is recommended that users only select the following options: Previous Pay Period, Current Pay Period, or Next Pay Period.



Select Range opens the Date Range window and allows you to select a specific range of dates to display on the screen. Range is limited to 365 days.



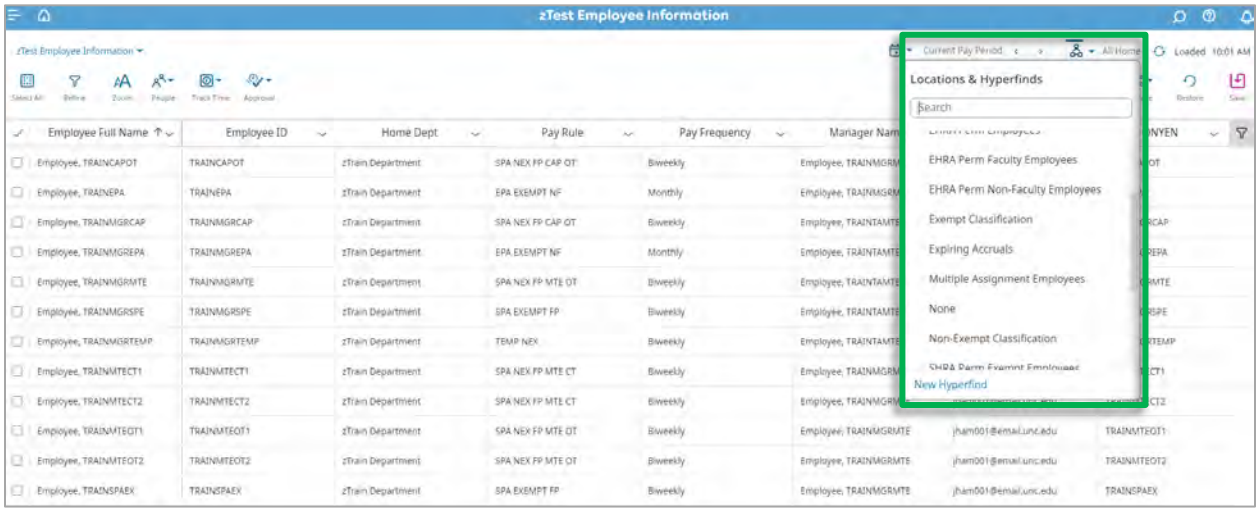
Note: Select the **Start Date** and the **End Date**, then click **Apply** to see a specific range of dates.

Hyperfind

The **All Home Employees** (Employee Information DV) or **Sign Off-Biweekly** (Pay Period Close DV) **hyperfind** is automatically selected when opening the dataview.

Utilizing Hyperfinds to Display Specific Employee Types

Hyperfinds allow you to filter your employee list by specific employee settings (SHRA, EHRA, temporary, etc.). Hyperfinds are accessed via the **Hyperfind Selector**.



Public Hyperfinds

All Home Employees: This is the default hyperfind that appears when you first log in. It includes both employees that report to the manager or are in the TIM Administrator's departments and those that have a secondary position in their employee group.

EHRA and SHRA Employee Type Hyperfinds:

- EHRA or SHRA Permanent employees
- Classification Type- all Exempt or Non-Exempt employees
- SHRA Student or SHRA Temporary employees
- Multiple Assignment employees (more than one active SHRA Student/Temp position in TIM as of today)

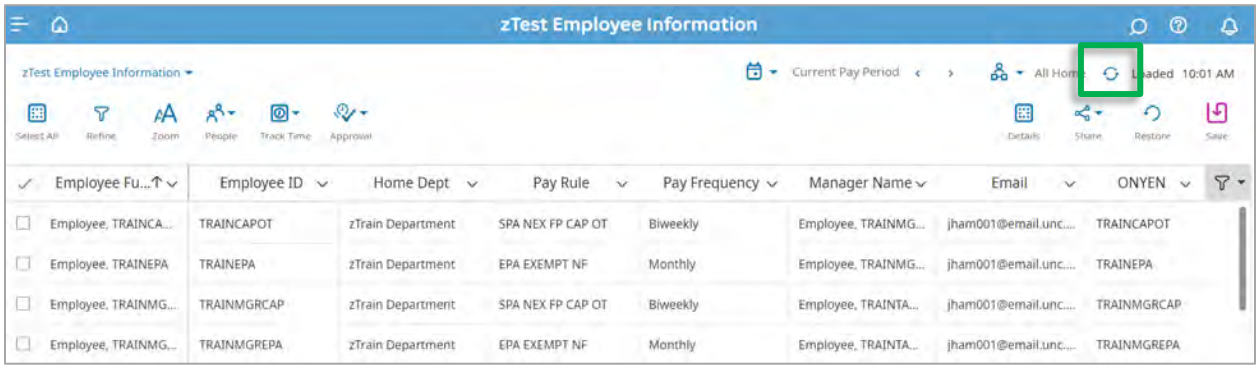
Sign Off-Biweekly: Displays all SHRA Non-Exempt and Exempt employees only.

Sign Off-Monthly: Displays all EHRA permanent employees only.

For instructions on how to build an Ad Hoc hyperfind or to save a Personal Hyperfind, refer to the **Custom Hyperfind** section in this guide.

Refresh Button

This small button is located next to the hyperfind selected and is important. It is used to refresh the information showing or to reset back to the original information and defaults. This 'cleans up' the dataview by removing any changes made, such as sorting or grouping columns.



Navigating a Dataview- Important Icons

Important Icons in the Dataview

Select All Rows Icon: Will select all the rows displayed on the screen. Click the icon a second time to unselect all rows.

Approval Icon: Allows you to approve employee timecards.

If you are a TIM Administrator, it also lets you sign off employee timecards. If you have historical corrections access, you can enable historical corrections. 'Enable Edits' must be selected within a dataview, the option does not appear in employee timecards.

You can perform each action for a single highlighted employee, or you can highlight multiple employees to perform each action for more than one employee at a time.

IMPORTANT: Approve or sign off timecards in the **Pay Period Close** dataview or in individual timecards **ONLY**. This enables you to see if any employees have missed punches and if their timecards have been approved.

Continued...

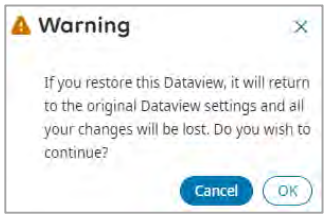
Share Icon: Allows you to:

A. Export: This option will automatically export all data in the Dataview into Excel for your use. You may be required to sort, format, etc. some of the data once it has been exported into Excel.

B. Print: This option opens a new tab in the browser where you can print or save the information as a PDF.

Restore Icon: This very important icon allows you to restore the Dataview to original settings. TIM Administrators can save dataviews. The Restore Icon removes any changes you have saved. You should Restore the dataview before contacting support.

After selecting the Restore Icon, a warning message will pop up. To Restore the Dataview to the original settings, click **OK.**



Save Icon: TIM Administrators Only- Allows you to save some adjustments taken in the dataview, such as the hyperfind selected, while in the current use, and since your last time saving.

Important: If you have selected a hyperfind or sorted the list of employees, always save the Dataview **before** you open employee timecards. So, when you click the back button in the browser to go back to the dataview, your selections will still be saved.

When you are finished or if you do not want to save your previous selections, click on the **Restore icon**.

Note: The icon will be grey if there are no current actions to save. It will turn purple if there are new actions to be saved. The Restore button removes the last adjustments you have saved.

IMPORTANT: It is recommended that you **save** the Dataview if you have changed the hyperfind, time period, or sorted/grouped columns **before** you open employee timecards with the Go To widget. When you return to the dataview (by using the browser back arrow), all of the changes to the dataview you made will be there.

It is also recommended that you click on the **Restore** icon when you are finished using a dataview. So, when you open the dataview again, the changes you made will not appear and you will see all of your employees.

Navigating a Dataview- Columns & Filters

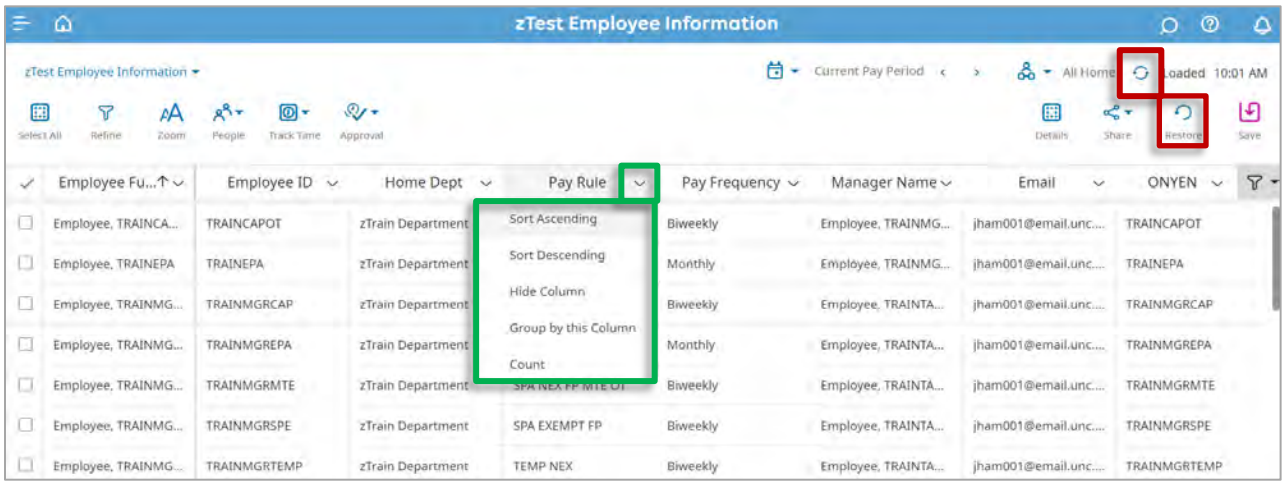
Column Options- Sort, Group, Hide

You can sort columns in ascending or descending order or hide or group the column by selecting the dropdown arrow beside each column header.

Important: Click the **Refresh button** to reset the list of employees and columns back to the original selection and defaults. This 'cleans up' the dataview by removing any changes made, such as sorting or grouping columns. TIM Administrators may also need to click the **Restore icon** if you need to remove the last saved adjustments from the dataview.

Sort: Allows you to sort a column in ascending or descending order.

Note: Remember to click the Refresh Button or Restore icon to return to default sorting.



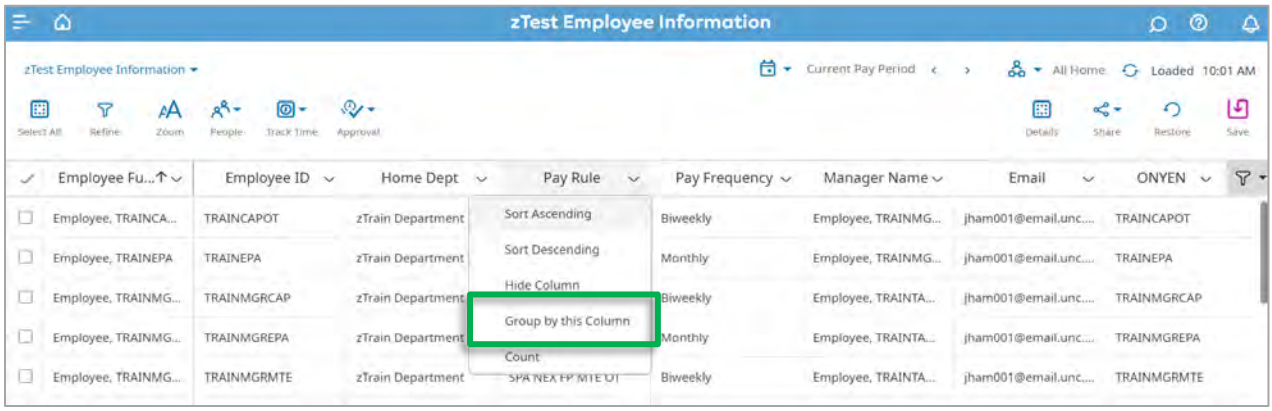
Continued...

Group By this Column: Allows you to group employees based on the categories provided in the column.

For example, you can group employees by Pay Rule.

To do so, click the dropdown arrow on the right side of the Pay Rule column that you want to group and select **Group By this Column**.

Note: Selecting a public hyperfind before or instead of grouping could be more helpful.



Result: A Grouped By column appears and employees are grouped by their pay type.

The blue triangle points to the right; the grouping information is shown collapsed. To expand it click on the Pay Rule group you wish to view. The blue triangle will point down when expanded.

Note: Click the Refresh button or Restore icon to remove column grouping.

Filters and Optional Columns

Filter Icon: allows you to manipulate columns shown and also search within column information.

Show Filters Row: Allows the user to search within a column or columns.

To remove the filter row, click the Filter Icon and then select Hide Filters Row.

Columns: This list provides users the ability to select columns to display or hide. Some are by default unchecked. Selected columns (indicated with a check mark) will display. Deselected columns (indicated with the absence of a check mark) will not display.

Clicking on the Restore icon, or logging out of TIM without saving will remove the filter setting changes you make.

Note: Please refer to the TIM Administrator Manual for detailed instructions on Navigating a Dataview.

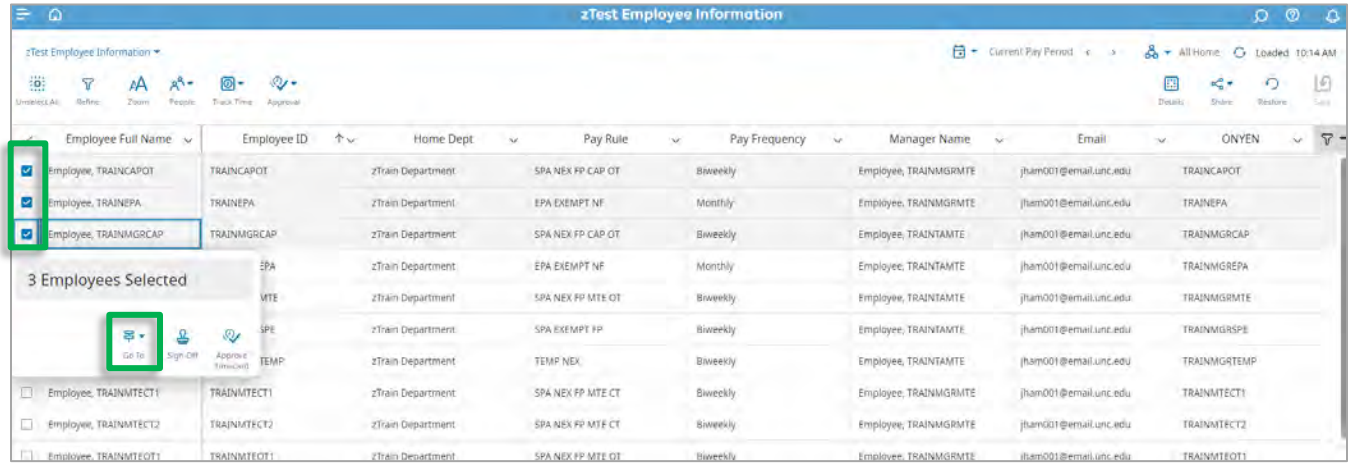
Continued...

Opening Employee Timecards, etc.

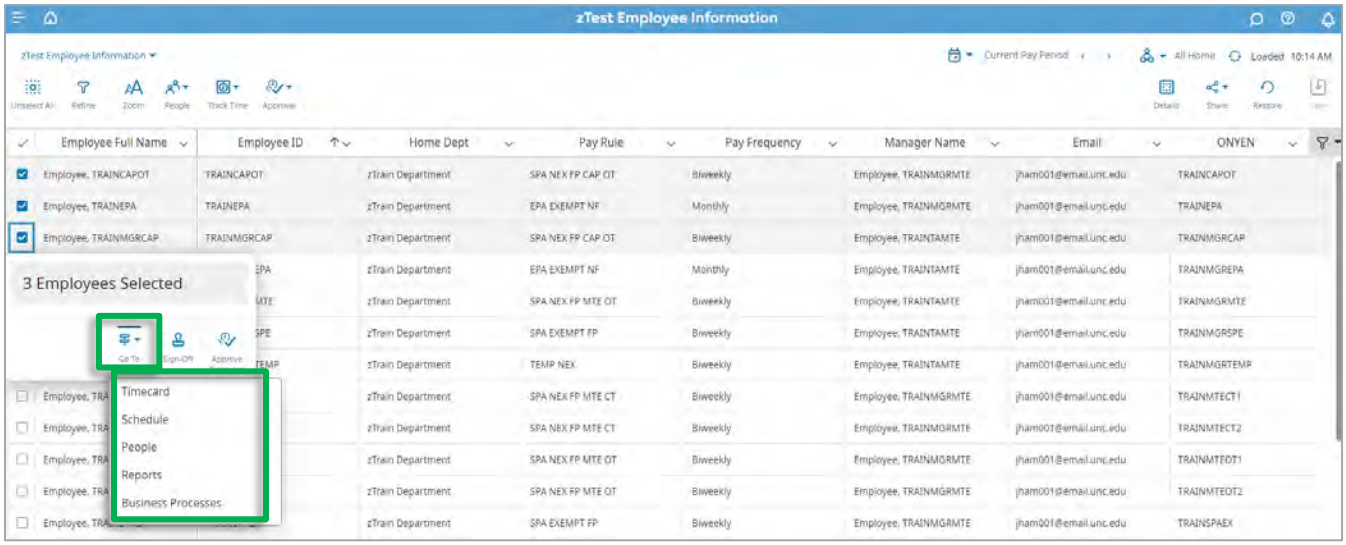
To access the Go To Icon and open employee timecards, schedules, etc., you must select at least one employee from the list in the Dataview. You can select multiple employees or all employees using the check boxes in the first column or by using the Select All icon.

In this example, 3 employees have been selected.

1. Right click on the name of one of the selected employees to access the Go To icon.

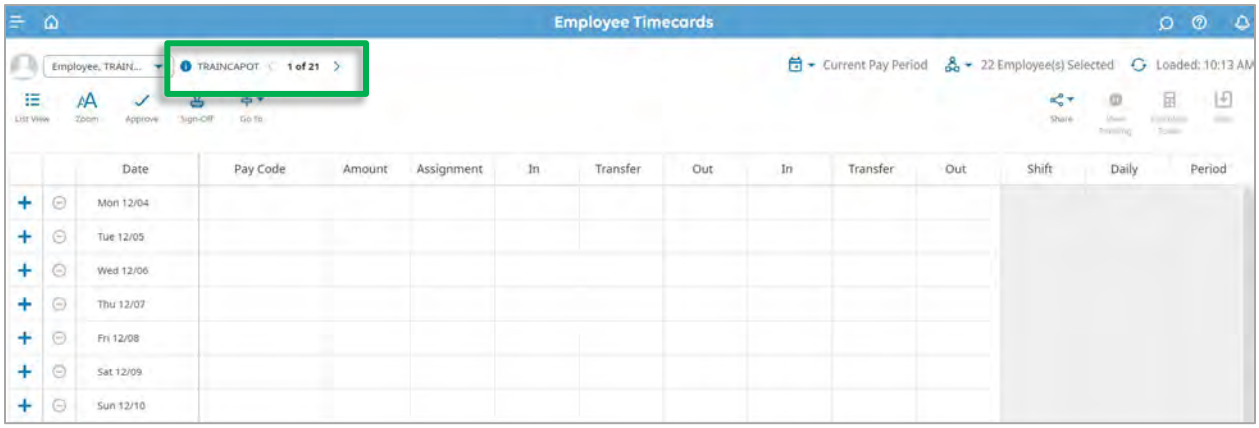


Result: You can now click the **Go To icon** the access its Widgets as seen below.



Important: The Approve Timecard or Sign-Off buttons also appear. It is recommended that you do **NOT** use these buttons in the Go To icon. Instead, use the **Approval icon** in the Pay Period Close Dataview.

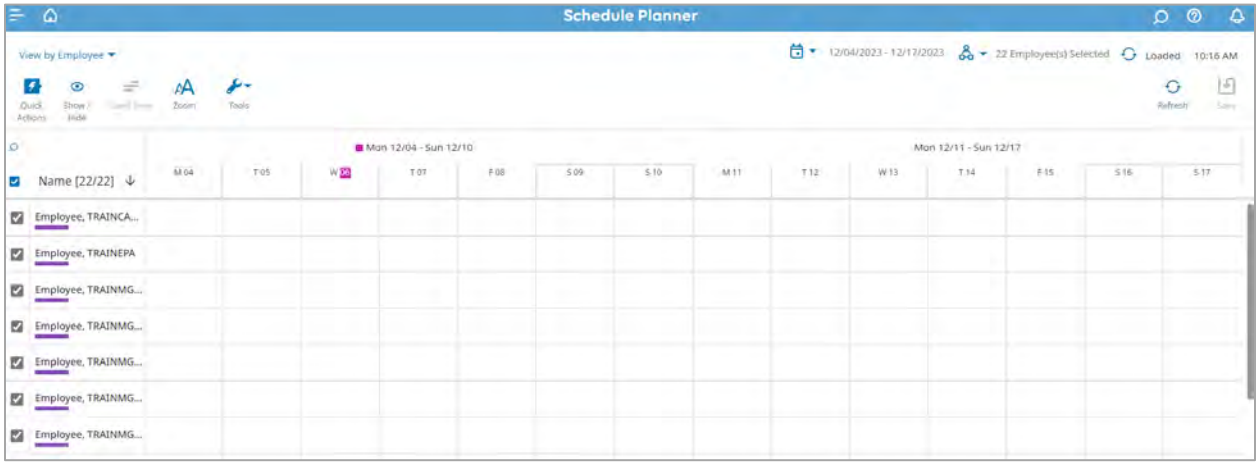
Timecard Widget: Opens the employees' timecards for the time period selected in alphabetical order by last name. Use the left and right arrows in the top left of the tab to scroll through employee timecards.



Note: To return to your list of employees click on the **back button** in the browser.

Schedule Widget: Opens the schedules for the selected employee(s).

Note: Be advised that it typically takes a significant amount of time for TIM to display the schedules for all your employees after you have clicked the Schedule Planner Widget. For this reason, it is better to select one or just some employees at a time.



Note: To return to your list of employees click on the **back button** in the browser.

IMPORTANT: It is recommended that you **Save** the dataview if you have changed the hyperfind, time period, or sorted/grouped columns **before** you open employee timecards or schedules with the Go To widget. When you return to the dataview (by using the browser back arrow), all of the changes to the dataview you made will be there.

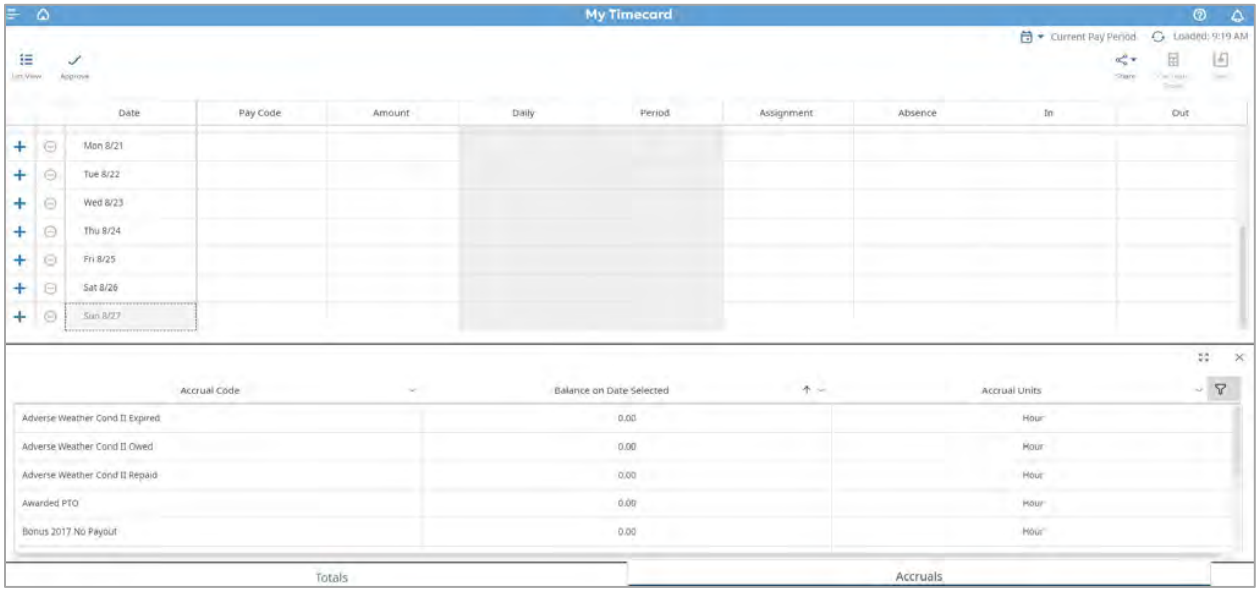
Viewing & Editing Employee Timecards

Viewing Employee Timecards as a Manager or TIM Administrator

Managers and TIM Administrators will see the same timecard format for **all employees** regardless of their classification, Monthly or Biweekly, Non-Exempt or Exempt. This timecard format shows all of the columns included in employee timecards.

Timecard Tabs

In the **Totals tab** you will see the pay codes and hours for the selected time period.

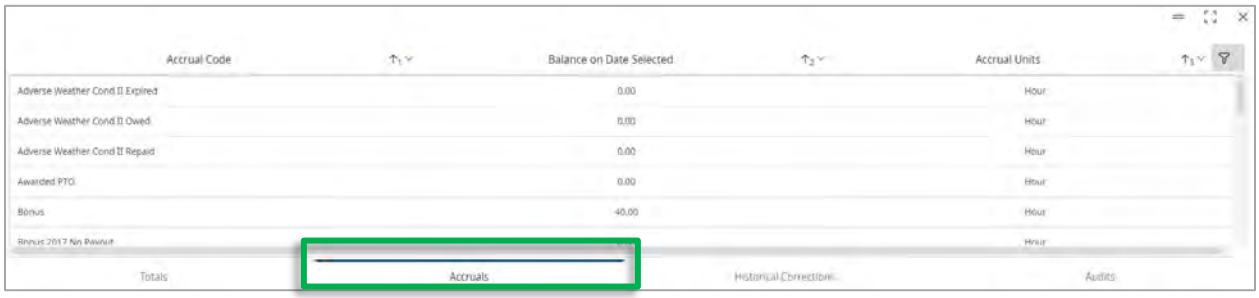


TIM Account Codes- 'Location and Job' option in the Totals Tab

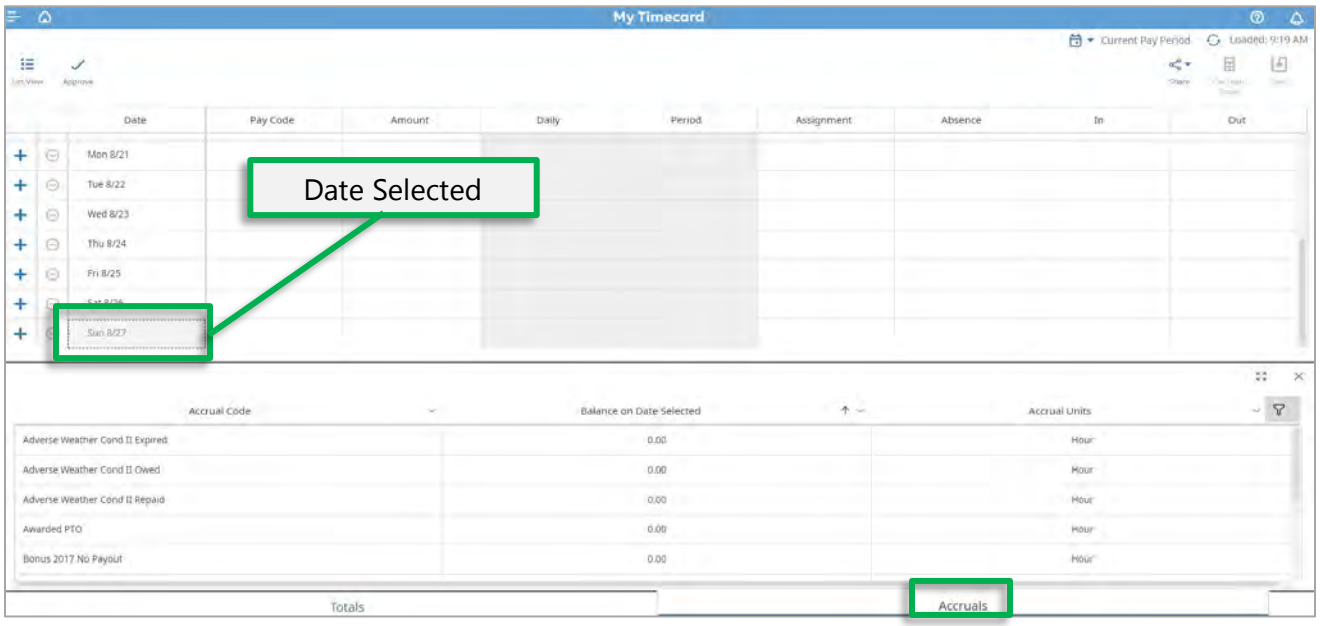
The Totals Tab also defaults to 'Location and Job'. To see pay codes and hours assigned to a **TIM Account Code** in the timecard, you will need to select **'**All' in the Location and Job drop down.

Accruals Tab

The **Accruals tab** allows you to review your Accruals on a selected date in the timecard.



To see accruals for a select date, click the cell of the date you wish to review.



Result: Accrual balances are shown as of the date you selected only.

Important:

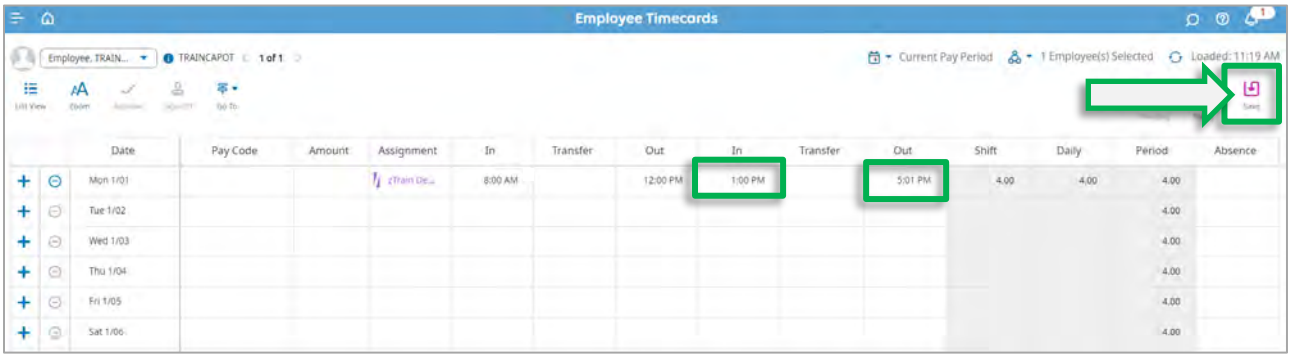
To see the starting accrual balances in the updated TIM, you **must select 4/1/2024 (monthly) or 4/8/2024 (biweekly)** in the timecard.

Any accruals that may appear before these dates do not impact the employee's starting accrual balances in the updated TIM.

To Enter Hours Worked by an Employee

Steps to Enter Times In and Out Worked in an Employee Timecard

1. Enter the times in and out in the appropriate cells and click **Save**.



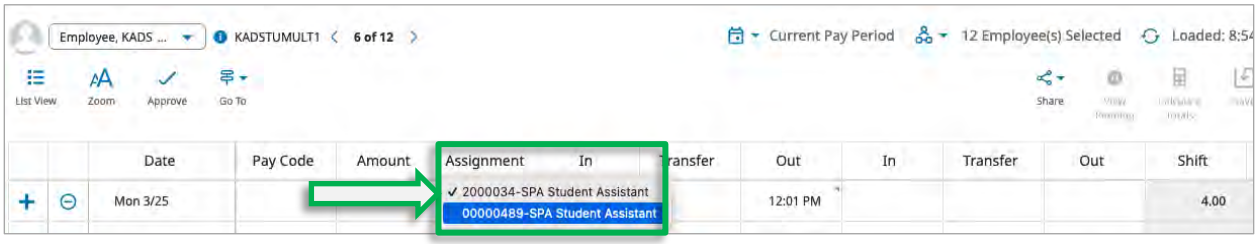
Assign a Shift Worked to a Secondary Assignment

Sometimes SHRA Students and Temporary employees with multiple positions forget to transfer to their secondary position when performing a timestamp in.

If this occurs, you will need to change the Assignment selected in the shift worked.

To Assign a Shift Worked to a Secondary Assignment

1. In the employee's timecard, locate the date a different assignment should have been selected. Click the cell in the Assignment column and select the correct assignment. All active Assignments will automatically appear.



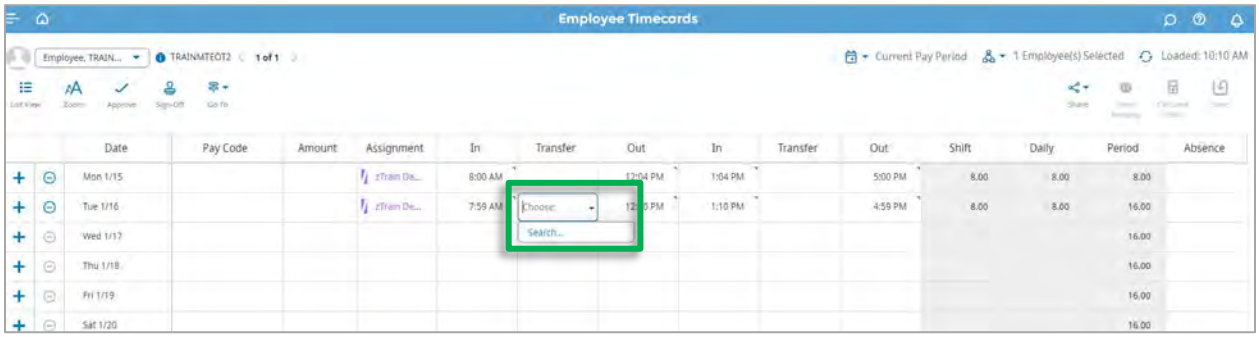
Note: Do not use the Transfer cell to select a position. Transfers are only used to select a TIM Account Code, referred to as Cost Centers in TIM, for the shift worked.

Transferring Hours Worked to a TIM Account Code

When an employee works a special event or needs Overtime hours charged to a different source account, the shift worked may be transferred to an account code in TIM. TIM Account Codes are created in ConnectCarolina by those with access.

To Transfer a shift to a TIM Account Code

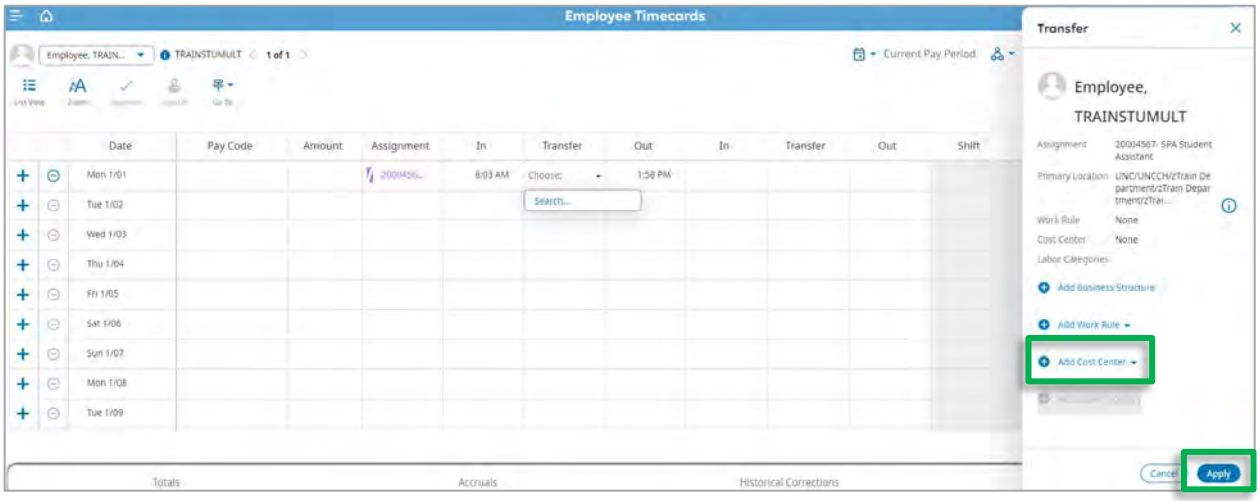
1. In the employee's timecard, locate the date that requires an account transfer.
   - Click the Transfer cell located between the In and Out columns for the hours worked that need to be transferred.
   - Then, click Search.



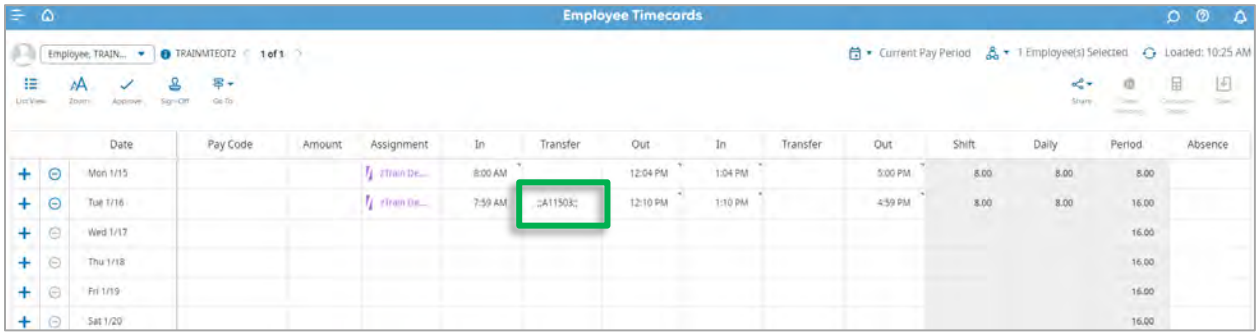
Result: The Transfer Window will display to the right of the screen.

2. Click **Add Cost Center** from the options listed and then search for the appropriate option/account.

   Select the account number when it appears in the search results. Then, click **Apply**.



3. Click **Save** to update the timecard.



Result: The new account number will be displayed in the Transfer column.

Pay codes and hours and the Cost Center (TIM Account Code) transferred do not automatically appear in the timecard Totals tab.

To view, Click the Totals tab link at the bottom of the timecard and from the second drop down, select **All**. A Cost Center column will appear in the Totals tab. The pay codes and hours will be listed according to the TIM Account Code(s) used in the timecard.

Note: Please refer to the TIM Administrator Manual for additional instructions on viewing and editing timecards.

Historical Corrections

If a timecard needs to be modified after the TIM Administrator has signed off, the revisions must be made as Historical Corrections by an **authorized** TIM Administrator.

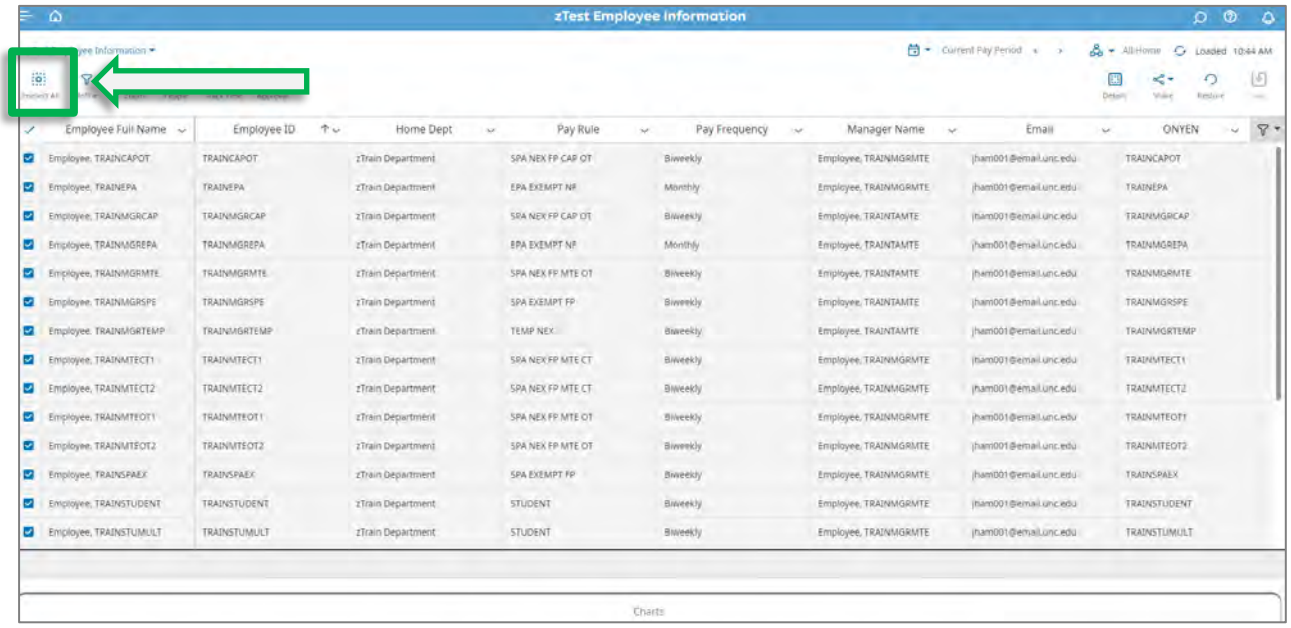
Important!

- Because we have not yet signed off a previous pay period with time and accruals in the updated TIM, Historical Corrections cannot be entered until **12:00 p.m. on Thursday, April 25** for biweekly employees and until **May** for monthly employees when their April timecards have been signed off.

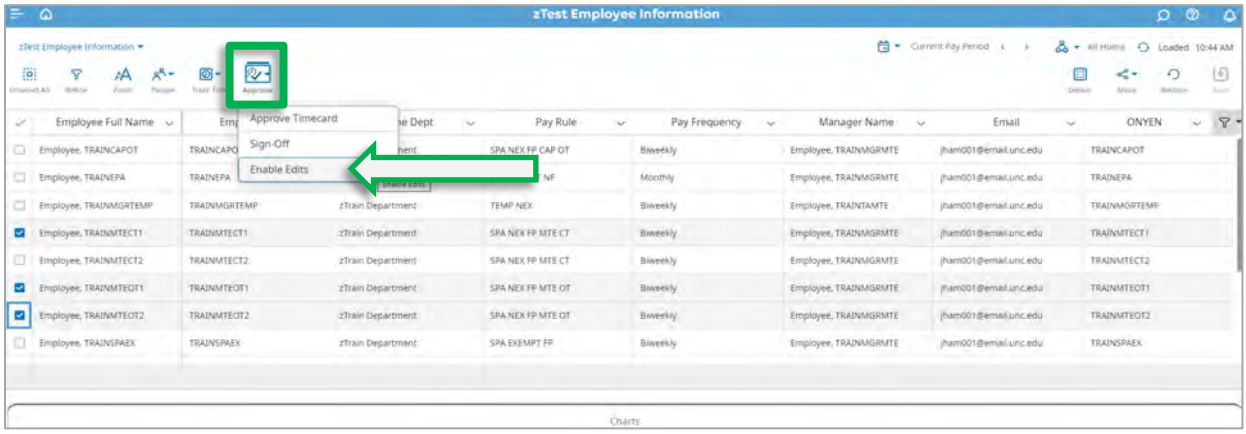
Enable Edits (TIM Administrators Only)

The ability to edit a timecard is turned off when the TIM Administrator signs off. To make any edits after you sign off and the pay period closes, you must enable edits before you can make your historical corrections. You can enable edits for either one employee or multiple employees.

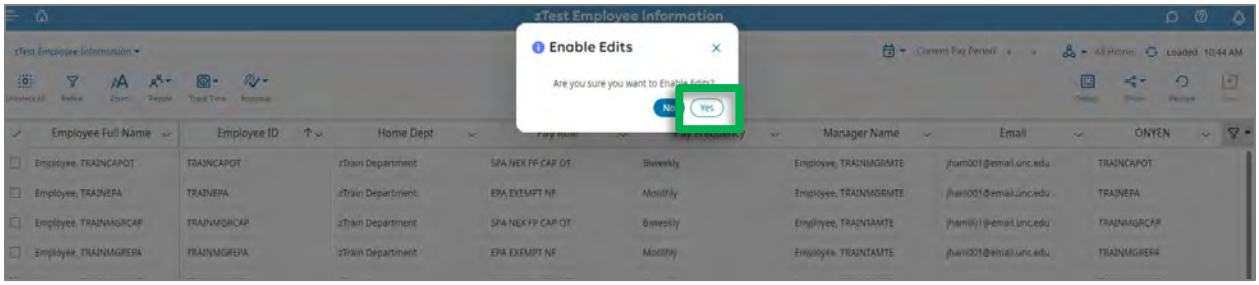
1. Open the **Employee Information window** via the arrow in the Employee Information Tile. You can also access Enable Edits by opening the Pay Period Close window via the arrow in the Pay Period Close Tile.
2. Select the employee(s).
    - To enable edits for all employees, click the Select All Rows button.



3. Click the **Approval Icon** and select **Enable Edits**.



4. Click **Yes** in the pop-up message.



Important: If you need to correct time in the 'previous pay period' you must wait until after 12:00 p.m. on the first Thursday of the current pay period before entering historical corrections. This is to ensure the corrected hours are **not** sent to payroll twice.

Note: Please refer to the TIM Administrator Manual for detailed instructions on how to enter Historical Corrections.

Custom Hyperfind (TIM Administrators Only)

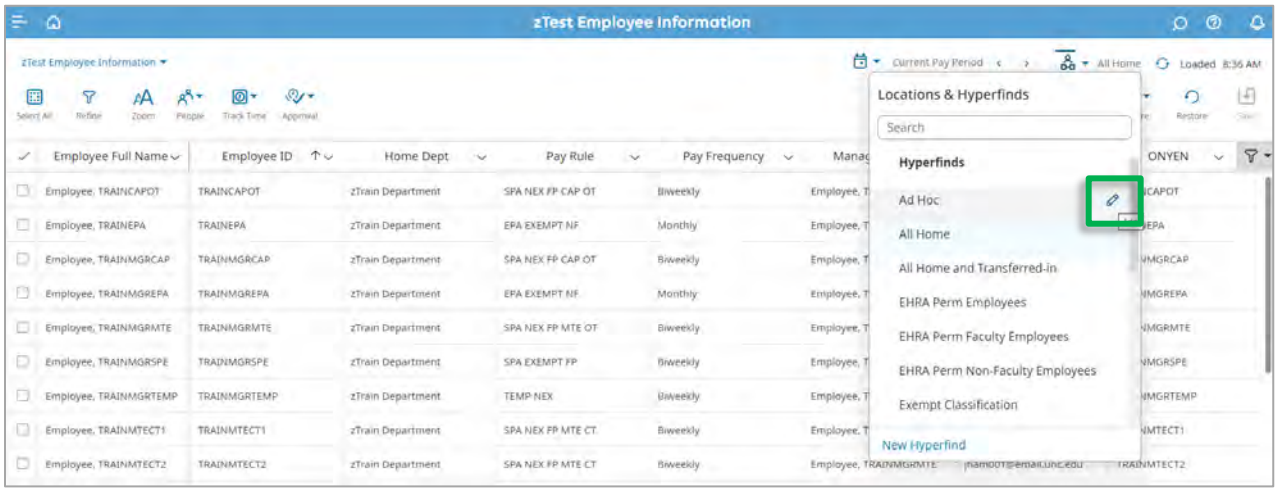
In addition to the public hyperfinds, TIM Administrators have the option to create custom hyperfinds. This allows administrators, who manage a large number of departments, to pull up a list of selected departments.

TIM has two types of customizable hyperfinds:

- **Ad Hoc**—Use this to setup a temporary custom hyperfind. Your customizations stay active in your workspace until you modify the Ad Hoc hyperfind again or log out of TIM.
- **Personal**—Create personal hyperfinds for very frequently reviewed departments. You must create an Ad Hoc or New hyperfind and then save it as personal. These cannot be removed, so save only the hyperfinds you know you will use frequently.

Create an Ad Hoc Hyperfind

1. From the Hyperfind Selector Dropdown, select the **Edit Ad Hoc icon** beside Ad Hoc from the top of the Hyperfind Selector list. You can also click **New Hyperfind** in the dropdown.



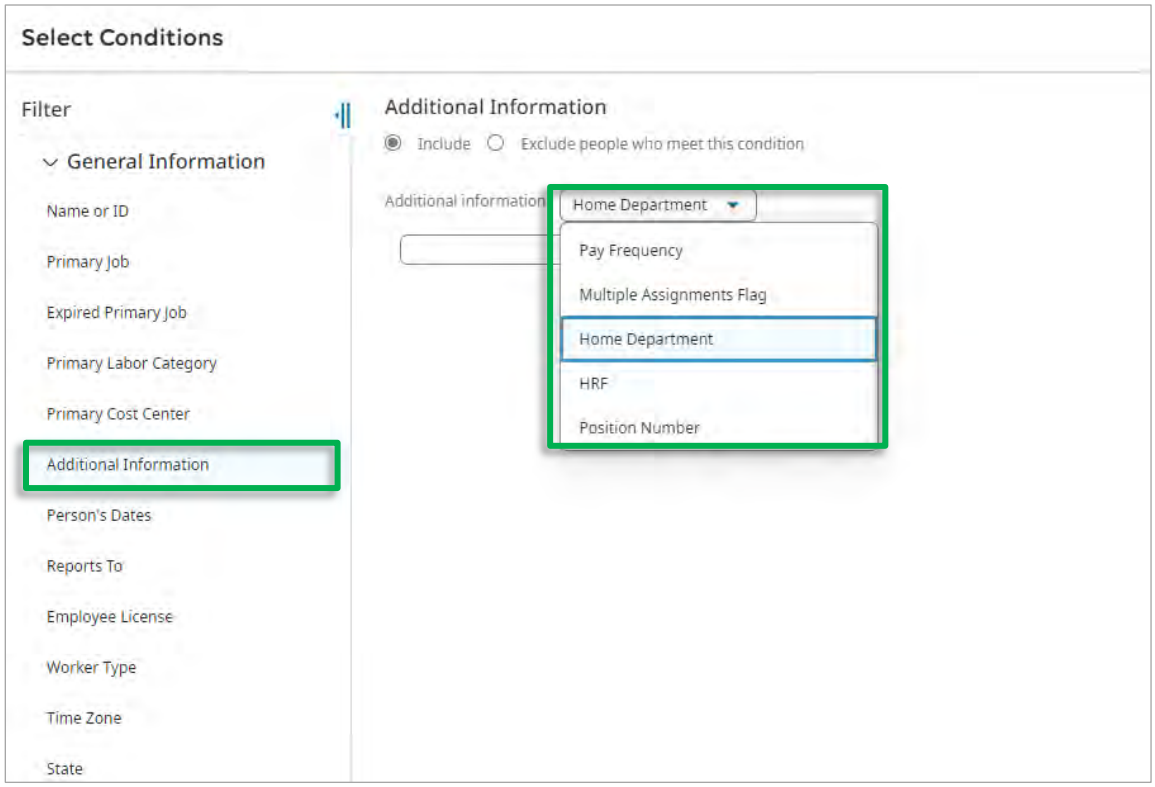
2. This opens the Hyperfind Editor window. At the bottom of the window, select **Add or Edit Conditions.**

Result: The Select Conditions window will display.

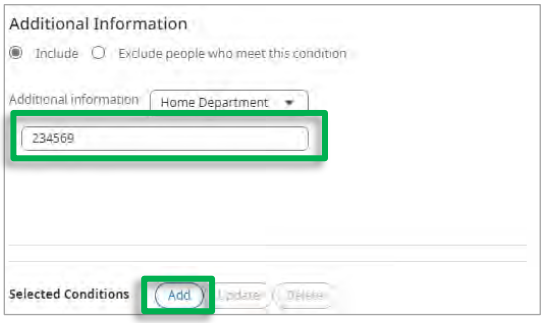
Use Ad Hoc to Display One or More Departments

If you know the department number:

1. On the Filter Conditions tab select **Additional Information**.
2. Change the dropdown in the Additional Information to **Home Department**.



Option 1: Enter the department number you need and click **Add**.



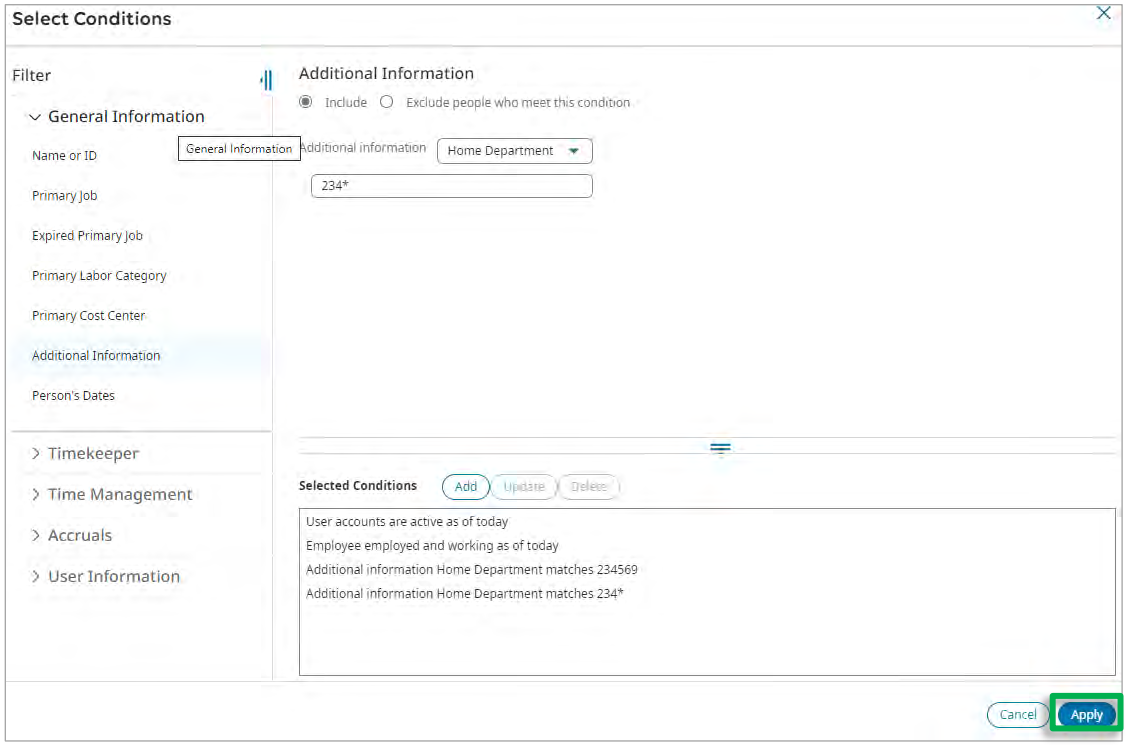
Note: To add additional departments, continue entering department number(s) and clicking Add.

Option 2: If you want to see all the departments starting with certain number (example 234) enter 234* then click add and all departments starting with that number will display.

Note: You will only see departments you have access to.

Note: Please refer to the TIM Administrator Manual for instructions on how to create an ad hoc hyperfind when you know the department name but not the number.

3. Once you have completed adding conditions, click **Apply.**



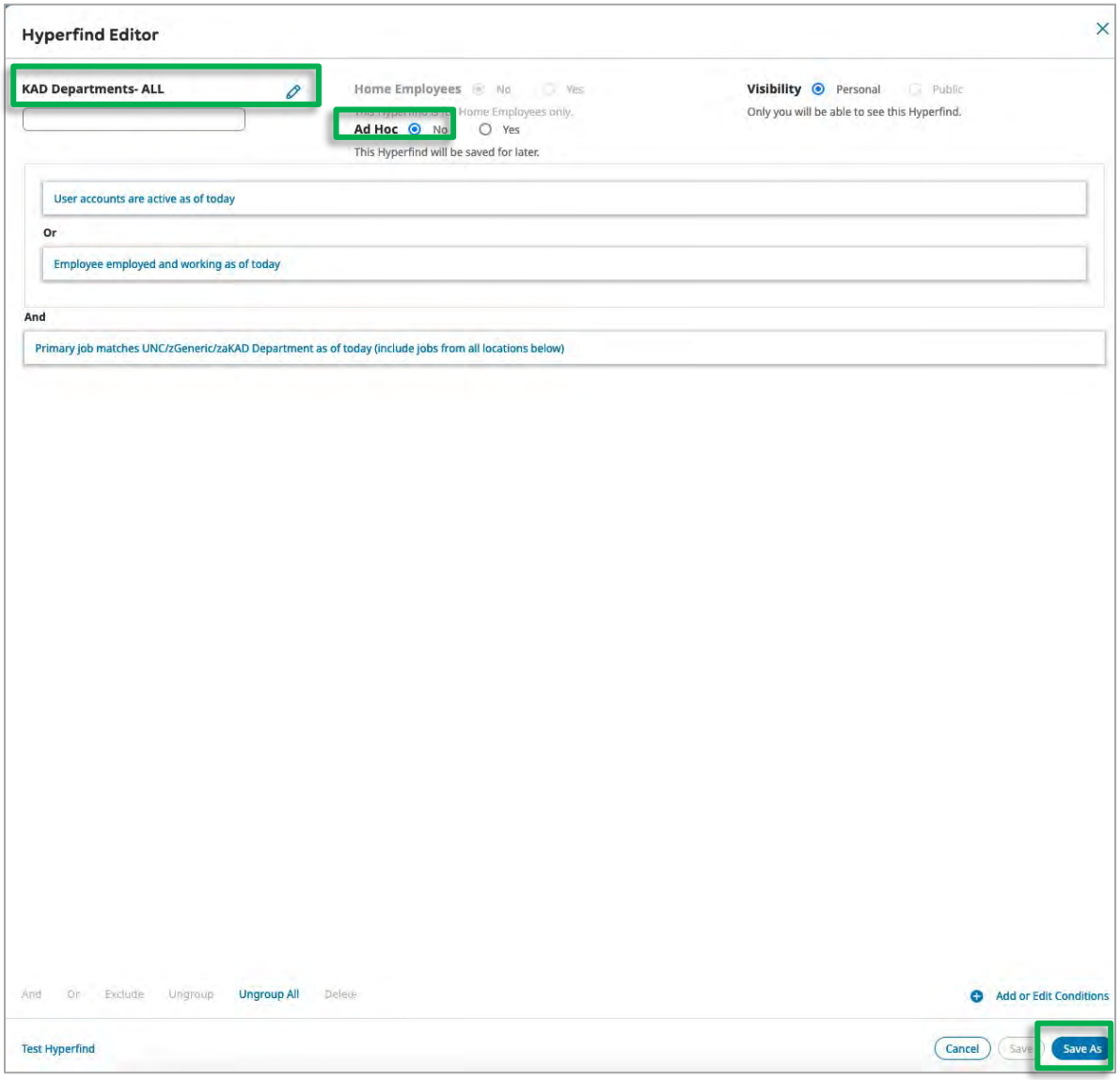
8. To save as an Ad Hoc hyperfind, click **Save** when the current window closes.

Note: The Ad Hoc hyperfind will maintain these settings until you edit it again or sign out of TIM. Save an Ad Hoc Hyperfind as a Personal Hyperfind

Or you may decide to save it as a **Personal Hyperfind** if you are a TIM Administrator and will use this hyperfind often.

To Save a Personal Hyperfind

1. Click on **No** beside Ad Hoc
2. Click on the **pencil icon** in the upper left corner and name the hyperfind.
3. Click the **Save As button** in the lower right corner to save it.



Note: Personal hyperfinds cannot be removed, so only save personal hyperfinds you will use often.

The hyperfind selector will now list any personal hyperfinds you have created.

- Hyperfinds will appear in alphabetical order.
- Personal Hyperfinds will always appear in normal (not bold) text.
- Public Hyperfinds, which you cannot edit, will always appear in bold text.
- No one but you will be able to see or use the Personal hyperfinds you create.

Custom Hyperfind Reminder:

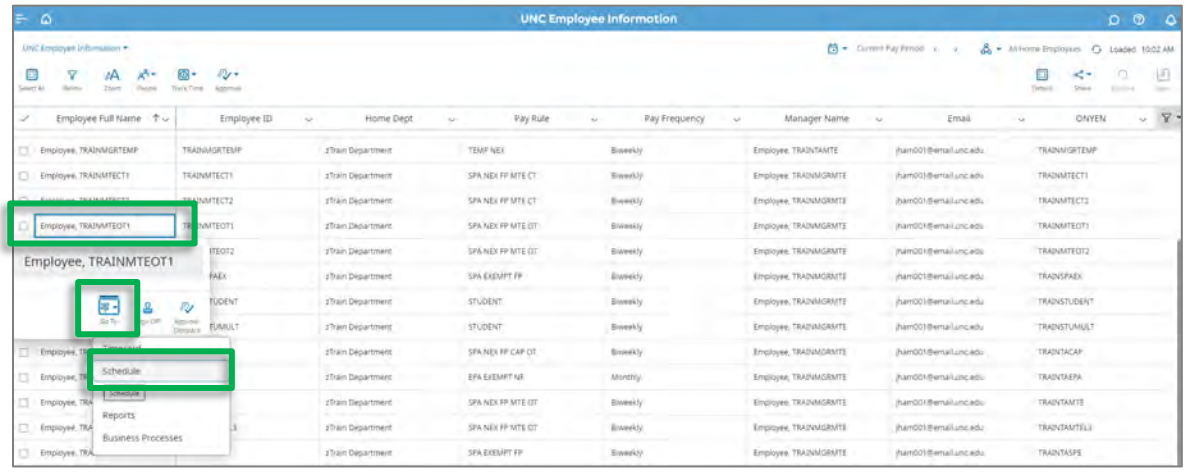
- If the edits you made to an Ad Hoc hyperfind are not working, you may need to Refresh your workspace.
- If a personal hyperfind you created is not showing up in the list, you may need to sign out and back into TIM.

Note: Please refer to the TIM Administrator Manual for additional instructions on creating custom hyperfinds.

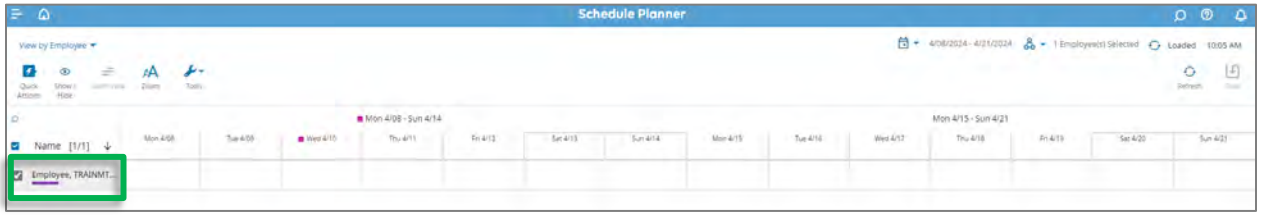
Employee Schedule Patterns in TIM

Creating a Schedule Pattern for Permanent Employees Set to Capture

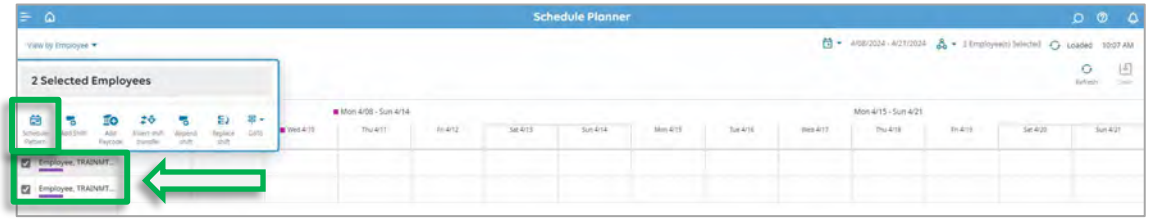
1. Select employee(s) in your list for whom you need to create a schedule pattern. Right-click on an employee's name and Click **Go To** and select **Schedule**.



2. The employee's schedule for the current schedule period appears. Double-click on the employee's name that you need to create a schedule pattern for.

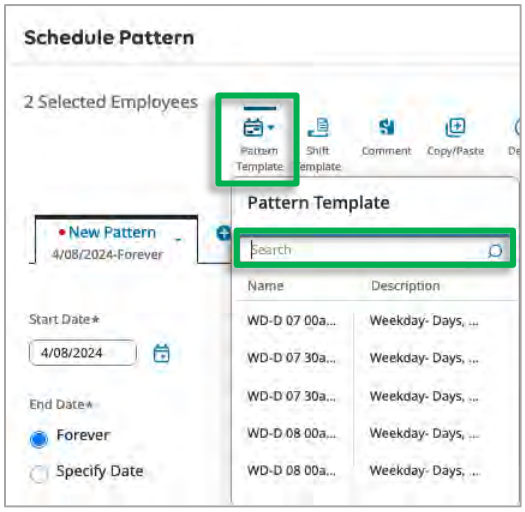


Or, if you are creating the exact same schedule for more than one employee, use the selector column to select the employees in the list. Then, right-click on a selected employee's name and select **Schedule Pattern**.

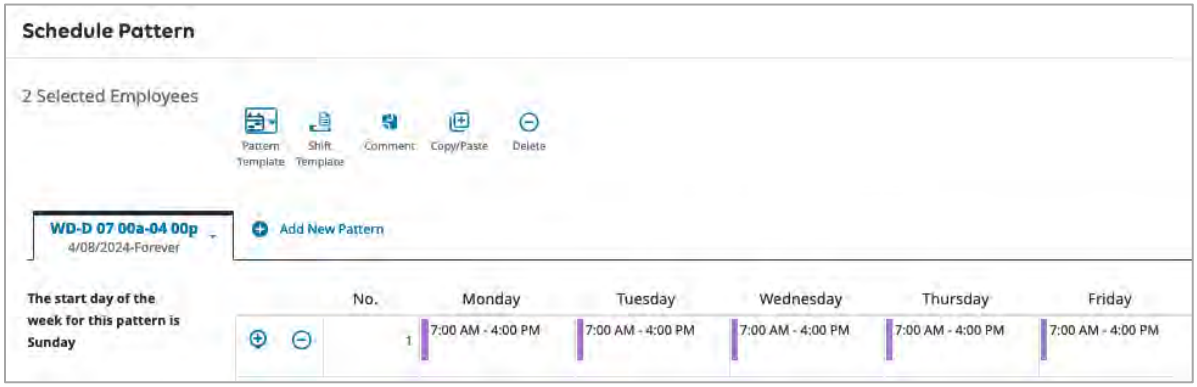


Option #1 Select a Pattern Template

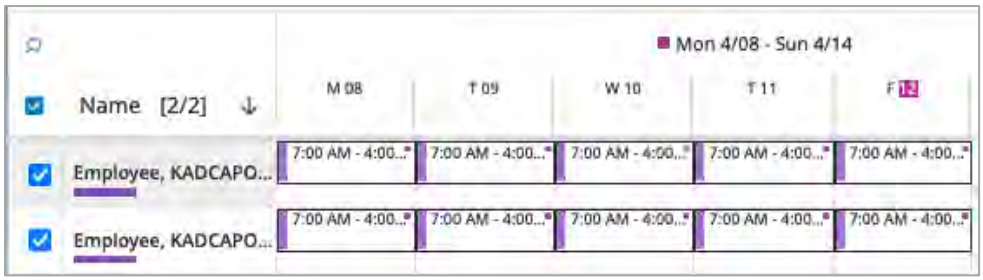
If possible, select a **Pattern Template** from the drop-down list. You can search for a pattern that matches the schedule the employee works. In this example, the employee works Monday-Friday, 7a-4p.



Result: The selected pattern template appears in the correct days. Click **Apply**.



Result: The pattern appears in the schedule for all previously selected employees.

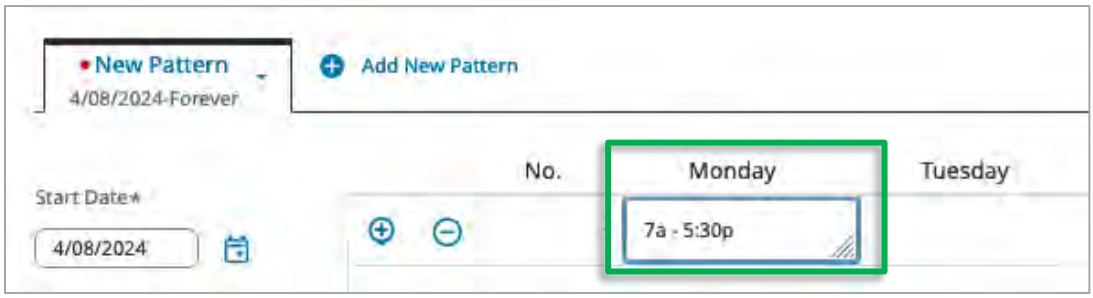


3. Finally, **Save** the Schedule Planner. This will save the pattern in the employee's schedule.

Option #1 Create a Schedule Pattern day-by-day.

In this example, the employee works Monday - Thursday 7a – 5:30p and there is not a predefined pattern template for this schedule.

1. Click on the first day of the schedule, Monday, and type in the start and end times, 7a – 5:30p.

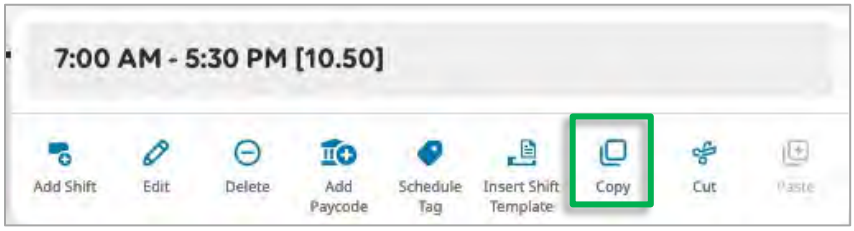


2. You can then enter the shift on each individual day and click **Apply.**

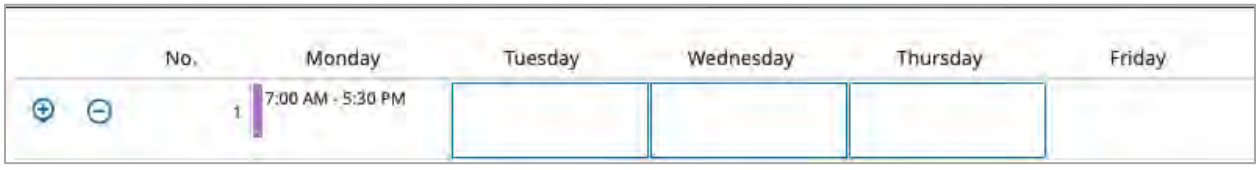
Options #2 Create the same Schedule Pattern for multiple days.

If you prefer, you can copy and paste the shift on multiple days.

1. Right click on the 7a – 5:30p shift and click on the **Copy icon** to copy the shift.

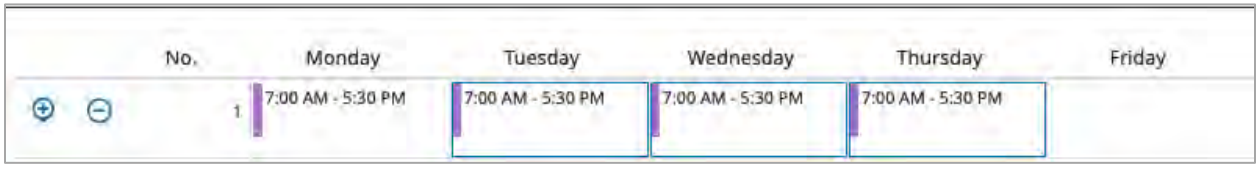


2. Highlight the other days worked in the schedule, Tu – Th, by holding down the **Ctrl key** and clicking on each day.



3. Right-click on a day and select the **Paste icon,**

Result: The shift will appear on the highlighted days.



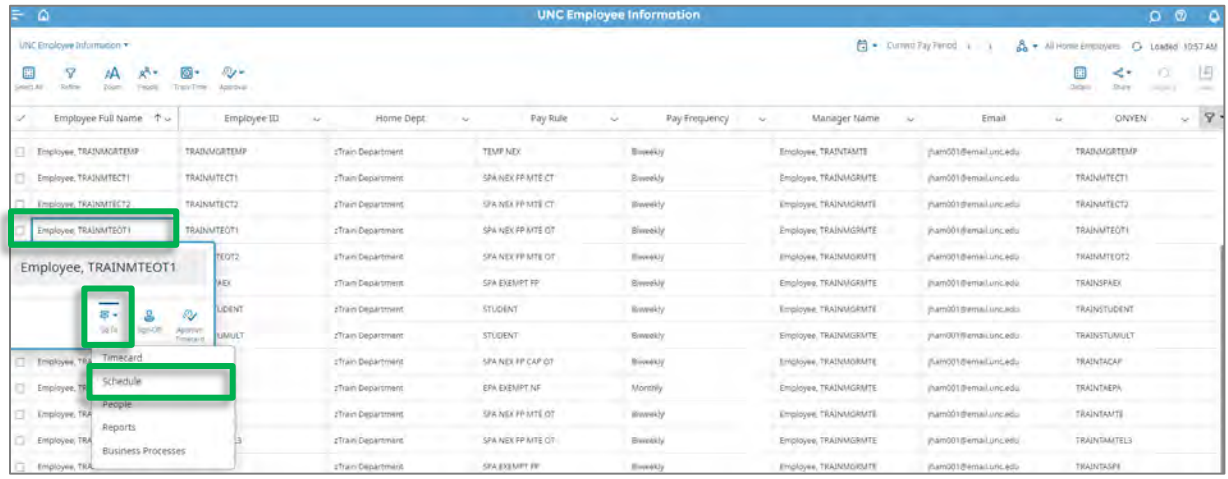
4. Click **Apply.**

Finally, **Save** the Schedule Planner. This will save the pattern in the employee's schedule.

Deleting an Employee's Schedule Pattern

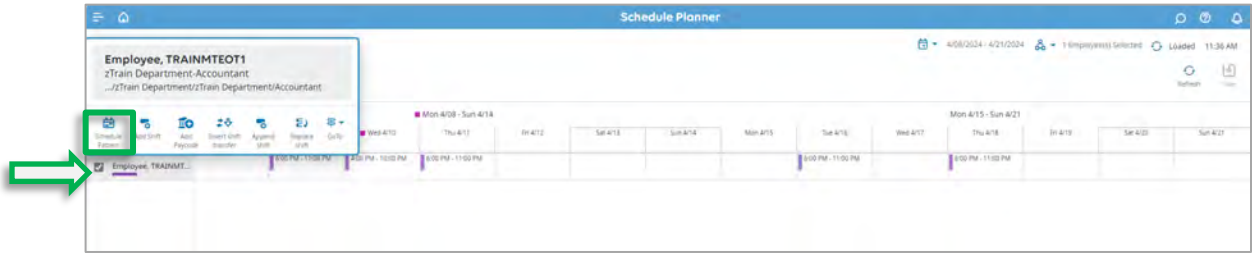
This transaction can only be performed for one employee at a time.

1. In the Employee Information window, click to highlight the employee. Then, click Go To and select Schedule.

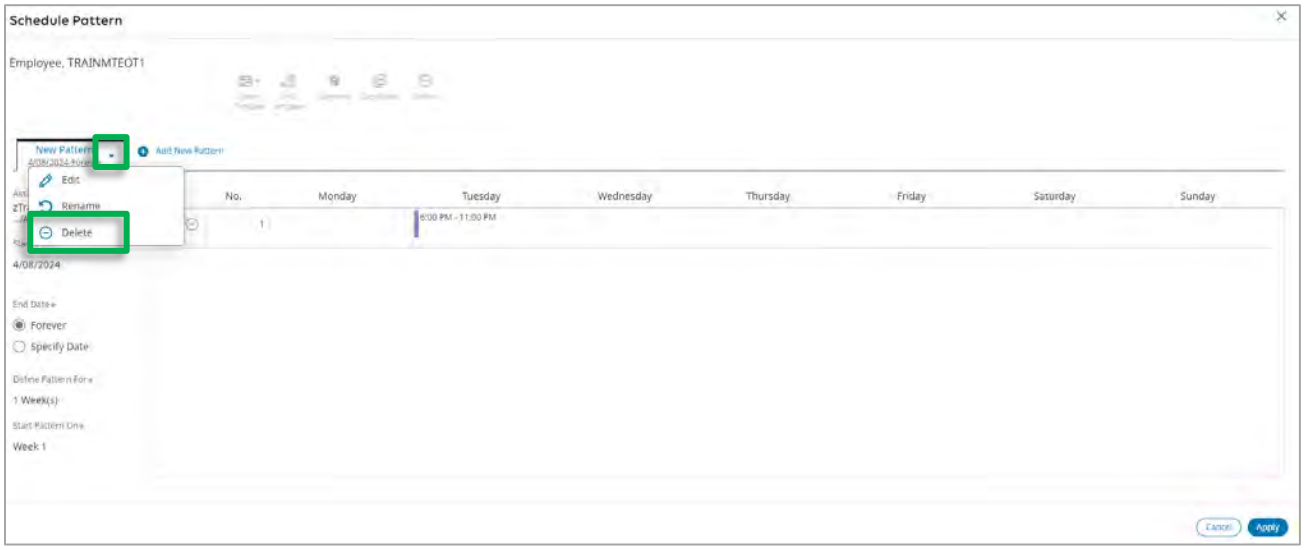


On the schedule tab you should see the employee's name with one or more lines showing the current schedule pattern.

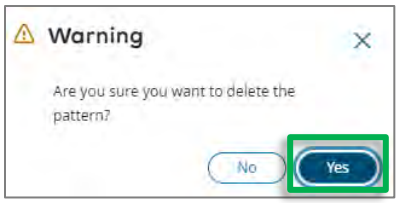
2. Right click on the employee's name and select **Schedule Pattern**.



3. Click the dropdown beside the Schedule Pattern name and click **Delete**.



4. Click **Yes**.



5. Click the **X** to close the Schedule Pattern window.
6. You can then click the back button in your browser to close the Schedule Planner window and return to the Employee Information window.

Note: Please refer to the TIM Administrator Manual for additional instructions on creating and editing schedules.