CalTime for Supervisors of Exempt Employees
Table of Contents

Genie Navigation .................................................................................................................................................. 1
QuickFind Genie .................................................................................................................................................. 3
Leave Usage Genie ............................................................................................................................................... 6
Exporting Genie Information .............................................................................................................................. 7
Adding a Missed Leave to an employee timecard ............................................................................................ 9
Deleting Leave on an employee timecard .......................................................................................................... 11
Correcting a Leave Code on an employee timecard .......................................................................................... 13
Adding Comments ............................................................................................................................................... 15
Viewing Accrual Balances in Timecards ........................................................................................................... 17
Approving Timecards Individually ..................................................................................................................... 18
Approving Multiple Timecards .......................................................................................................................... 20
Removing and Reapplying Approval to an employee timecard ........................................................................ 22
Generating Department Reports ....................................................................................................................... 23
Genie Navigation

Purpose

CalTime Genies present customized views of employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to time, labor, scheduling, and attendance needs.

You can navigate to any timekeeping page using the tabs in the banner. As you move your cursor from tab to tab, each one changes color and displays a drop-down list. Each list contains other timekeeping pages to which you have access.
Show and Time Period Fields

The Show field allows you to display a group of employees. When you log on, the default setting for the Show field is All Home, which displays all employees whose time you need to view. You can use the Show field to refine your selection further to include employees in a specific group, such as only those employees who work in a particular area.

The Time Period field allows you to specify the timeframe you want to view, such as the current pay period or a particular timeframe in the past. The time period you select controls what you will see on that page.

Steps

1. From the My Genies tab, access the Leave Usage Genie.
2. Select the specific set of employees from the Show drop-down list.
3. Select the specific time period from the Time Period drop-down list.
4. To sort information by one or two columns, click the column for the secondary sort first, and then click the column for the primary sort.
5. Review the information in the Leave Usage Genie.
Quick Links

Quick links are located at the top of the workspace and allow you to access information specific to one or more employees. For example, you can select one employee and click the Timecard quick link to access his or her timecard. Or, you can select multiple employees and click the Timecard quick link to view timecards for just those employees whom you selected.

Menu Bar

The Menu Bar contains tasks that you can perform on the page. Each Menu Bar is specific to the page you are currently viewing.

Steps

1. In the workspace area, highlight the employees for whom you need to access data.

2. Which system component do you want to access?
   - To access timecards for the selected employees, click the Timecard quick link
   - To access the People Editor for the selected employees, click the People quick link
   - To run reports for the selected employees, click the Reports quick link
Steps

9. Review information in the Status column. Click Refresh Status.

10. Click View Report.

The following is an example of an Employee Transactions and Totals report.
Steps

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Enter your search criteria in the <strong>Name or ID</strong> box. For example: To search for all employees whose last name starts with B, enter B*. To search for all employees whose first name starts with j, enter <em>,&lt;space&gt;j</em></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Find</strong>.</td>
</tr>
</tbody>
</table>
Leave Usage Genie

Purpose
The Leave Usage Genie helps you review leave taken at any point during a pay period. The most common categories of Vacation, Sick and Leave without Pay are displayed. Also displayed is the column Other Pay Codes, which is a total of all other less used pay codes.

The main areas of the Leave Usage.

<table>
<thead>
<tr>
<th>LEAVE USAGE GENIE</th>
<th>Show</th>
<th>Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per.</td>
<td>Person Name</td>
<td>Primary Labor Acct.</td>
</tr>
<tr>
<td>90.</td>
<td>Anderson, Nick</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Briones, Cheryl</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Briggs, Thomas</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Carter, Rick</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Cross, James</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Fred, Cheryl</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Hispanic, Liz</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Jackson, Katrina</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>91.</td>
<td>Leave, Carolyn</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>91.</td>
<td>Nguyen, Sam</td>
<td>TEST1111111111111</td>
</tr>
<tr>
<td>90.</td>
<td>Sanchez, Rick</td>
<td>TEST1111111111111</td>
</tr>
</tbody>
</table>

Steps

1. From the My Genies tab, access the Leave Usage Genie.

2. Select the specific set of employees from the Show drop-down list.

3. Select the specific time period from the Time Period drop-down list.

4. (Optional) To sort information by one or two columns, click the column for the secondary sort first, and then click the column for the primary sort. **Note:** Click a second time to reverse the sort.

5. Review the information in the Leave Usage Genie.
Exporting Genie Information

Purpose
CalTime Genies display critical information in an easy-to-read format. You can export this information to other applications, such as Microsoft Excel, where you can reformat the data for your business needs. For example, you can save leave taken information in the Leave Usage Genie as an Excel file and then open it with Microsoft Excel to summarize the data in each column. You can also export the data to a CSV (Comma Separated Value) file to make it easier to work with hour amounts.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access a Genie, such as the Leave Usage Genie.</td>
</tr>
<tr>
<td>2</td>
<td>Select Actions &gt; Export.</td>
</tr>
<tr>
<td>3</td>
<td>Choose the export option: Export to Excel or Export to CSV.</td>
</tr>
<tr>
<td>4</td>
<td>In the File Download dialog box, click Open to review the Genie data.</td>
</tr>
<tr>
<td>5</td>
<td>(Optional) Click Save. Then, in the Save As dialog box, select a location for the file and click Save. You can review the data by opening the file from its new location.</td>
</tr>
</tbody>
</table>

Click option to select
The following is an example of the Leave Usage Genie opened in Microsoft Excel.
Adding a Missed Leave to an employee timecard

Purpose
Pay codes keep track of the leave time and other non-worked time that is entered in the timecard. Examples of pay codes include: Vacation Leave Time, Sick Leave Taken, Leave without Pay, and Jury Duty.

It is important that hours are tracked to the correct pay code so that the employee’s time is tracked correctly and is paid correctly. There are times when you might need to edit an employee’s timecard and use a pay code to track his or her non-worked time; for example, when the employee calls in sick.

Business practice
A timecard is a legal document. It is always advisable to have an employee make any needed changes. In the event you need to make a change, written permission from the employee should be obtained in advance.

Acceptable formats for Entering Pay Code Amounts

<table>
<thead>
<tr>
<th>Acceptable Format</th>
<th>Example</th>
<th>Interpretation by CalTime</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leading zeros (optional)</td>
<td>08</td>
<td>8:00 hours</td>
</tr>
<tr>
<td></td>
<td>08:00</td>
<td>8:00 hours</td>
</tr>
<tr>
<td>Colon</td>
<td>8:00</td>
<td><img src="https://example.com" alt="Note:" /> 8:00 hours</td>
</tr>
<tr>
<td>Decimal</td>
<td>8.0</td>
<td>8:00 hours</td>
</tr>
</tbody>
</table>

Steps

1. Select one or more employees whose timecards you want to edit and click the **Timecard** quick link.
2. Select the specific time period from the **Time Period** drop-down list.

3. On the row of the date where you want to enter the pay code amount, select the pay code from the **Pay Code** drop-down list.

4. Click the **Amount** cell next to the pay code you selected. Enter the number of hours using an acceptable format.

5. Click **Save**.
Deleting Leave on an employee timecard

Purpose
In the event that leave was entered on the wrong day or to the wrong employee, you may need to delete the leave.

Business practice
A timecard is a legal document. It is always advisable to have an employee make any needed changes. In the event you need to make a change, written permission from the employee should be obtained in advance.

Steps

1. Select one or more employees whose timecards you want to edit and click the Timecard quick link.

2. Select the specific time period from the Time Period drop-down list.

3. Identify the line with the pay code that needs to be deleted and click the Delete Row icon.
Steps

4. Click **Yes** to delete the row.

5. Click **Save**.
Correcting a Leave Code on an employee timecard

Purpose
If a leave code is incorrect you can change it. For example, if an employee originally planned a vacation day, but was sick instead, you can change the code.

Business practice
A timecard is a legal document. It is always advisable to have an employee make any needed changes. In the event you need to make a change, written permission from the employee should be obtained in advance.

Steps
1. Select one or more employees whose timecards you want to edit and click the Timecard quick link.

2. Select the specific time period from the Time Period drop-down list.

3. Click the cell with the incorrect leave code and select the correct code from the drop-down list.
<table>
<thead>
<tr>
<th>Date</th>
<th>Pay Code</th>
<th>Comment</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun 7/22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mon 7/23</td>
<td></td>
<td>Sick Leave Taken</td>
<td>8.0</td>
</tr>
<tr>
<td>Tue 7/24</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Steps

4. Click **Save**.
Adding Comments

Purpose
Comments are predefined descriptive phrases that you attach to a pay code to provide additional, useful information about that transaction. You can attach comments as needed to explain the pay code.

Steps

1. Select one or more employees whose timecards you want to edit and click the Timecard quick link.

2. Select the specific time period from the Time Period drop-down list.

3. Click on the amount that you want to add a comment.

3. Select Comment > Add Comment.

Note: You can also right-click the cell and select Add Comment from the shortcut menu.

(a) Click on Amount to add comment

(b) Click Add Comment

Time Period selection
Steps

4. Select one or more comments from the list.
   **Tip:** Hold the **Ctrl** key to select more than one comment.

5. Click **OK**.

6. Click **Save**.

---

**Business practice**

You can view comments under the **Comments** tab in the bottom section of the timecard.

<table>
<thead>
<tr>
<th>Date</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thu 7/26</td>
<td>Supervisor Adjustment</td>
</tr>
</tbody>
</table>
Viewing Accrual Balances in Timecards

Purpose
Before you enter non-worked time, confirm that the employee has accrued enough hours. The Accruals Reporting Period tab displays the employee’s current and projected accrued times.

Note
Employees and supervisors cannot enter leave time if the employee does not have the time available. Below is a sample of the message CalTime displays if the employee does not have leave time available.

Column
Description

Accrual Code
The code that identifies and holds the type of leave balance, such as Vacation or Sick Leave

Accrual Available Balance
The balance that is available as of the date selected in the Balance as of field
CalTime Modules

Approving Timecards Individually

Purpose
CalTime allows you to review and approve timecards one at a time. You need to approve them to indicate to your timekeeper and/or payroll manager that they are ready for processing. You can approve timecards from the timecard itself. After you approve a timecard, the employee cannot make any edits to it unless you remove your approval.

Steps

1. Access a Genie, such as the Leave Usage Genie.

   ![Leave Usage Genie](image1)

   **MY GENIES**
   
   QuickFind
   
   Leave Usage Genie
   
   Accrual Leave Balances

2. Select the specific set of employees from the Show drop-down list. Select the specific time period from the Time Period drop-down list.

   ![Leave Usage Genie](image2)

   **LEAVE USAGE GENIE**
   
   Last Retrievable: 12-MAY
   
   Show
   
   Time Period

Do you want to view and approve timecards for all employees or specific employees?

Select the employee(s):

a. Click any Employee OR
b. To approve timecards for specific employees, hold the Ctrl key and select each employee OR

c. To approve timecards for all employees in a Genie, select Actions > Select All

Then Click the Timecard Quick Link

![Timecard Quick Link](image3)
**Steps**

4. On the First Timecard Review Then Select **Approvals > Approve**.

5. Use the **Next Employee** arrow to view another employee’s timecard and approve it.

6. Click **Refresh**, and review the Manager Approval and Manager Who Approved Timecard columns.

7. To check the approval status on a timecard, click the Sign-offs & Approvals tab and review the Approval by Manager information.

<table>
<thead>
<tr>
<th>Steps</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>On the First Timecard Review Then Select Approvals &gt; Approve.</td>
</tr>
<tr>
<td>5</td>
<td>Use the Next Employee arrow to view another employee's timecard and approve it.</td>
</tr>
<tr>
<td>6</td>
<td>Click Refresh, and review the Manager Approval and Manager Who Approved Timecard columns.</td>
</tr>
<tr>
<td>7</td>
<td>To check the approval status on a timecard, click the Sign-offs &amp; Approvals tab and review the Approval by Manager information.</td>
</tr>
</tbody>
</table>
Approving Multiple Timecards

Purpose
CalTime allows you to approve a group or all timecards all at once, rather than individually. When you approve multiple timecards at once, it is advised to review the time in the Leave Usage Genie prior to a group approval. Use the Group Edit Results page to confirm that all of them are approved. If one or more of the timecards are not approved, the Details link on the Group Edit Results page identifies whose timecard was not approved and why.

Steps
1. Access a Genie, such as the Leave Usage Genie.

2. Select the specific set of employees from the Show dropdown list. Select the specific time period from the Time Period dropdown list.

3. Do you want to approve timecards for all employees or specific employees?
   - To approve timecards for all employees in a Genie, select Actions > Select All
   - To approve timecards for specific employees, hold the Ctrl key and select each employee
Steps

4. Select **Approvals > Approve**.

5. Click **Yes** to confirm your approval.

6. Click **Refresh**, and review the Manager Approval and Manager Who Approved Timecard columns.

7. Click the **General** tab, selecting **Group Edit Results** to review the group approval status.

8. If the Group Edit Results indicate that some timecards are not approved, click the **Details** link in the Results column and review the reasons why.
Removing and Reapplying Approval to an employee timecard

Purpose
After you approve one or more employees' timecards, they are no longer editable. If the need arises, you can remove your approval. After you remove your approval, the employee can remove their approval and then edit the timecard or you can make the necessary timecard edits and then re-approve the timecard. You are the only person that can remove your approval.

**Steps**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access a Genie, such as the <strong>Leave Usage Genie</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>Select the specific set of employees from the <strong>Show</strong> dropdown list. Select the specific time period from the <strong>Time Period</strong> dropdown list.</td>
</tr>
<tr>
<td>3</td>
<td>Select the employee.</td>
</tr>
<tr>
<td>4</td>
<td>Select <strong>Approvals &gt; Remove Approval</strong>. <strong>Note</strong>: Once the timecard edits are complete, approve the timecard again.</td>
</tr>
</tbody>
</table>
## Generating Department Reports

### Purpose
You can generate reports on a daily, weekly, or pay period basis, or any time you need information to accomplish your business tasks.

### Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1    | Do you want the report to include specific employees or all employees?  
- To specify one or more employees, access a Genie. Select the employees to include in the report. **Then go to step 2.**  
- To select all employees, select **General > Reports**. **Then go to step 3.** |
| 2    | Click the **Reports** quick link. |

---

**LEAVE USAGE GENIE**

Last Refreshed: 5:00PM

<table>
<thead>
<tr>
<th>Per...</th>
<th>Person Name</th>
<th>Primary Labor Acc...</th>
<th>Employee Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>Anderson, Nick</td>
<td>TEST01234567890...</td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>Brickle, Ginny</td>
<td>TEST01234567890...</td>
<td></td>
</tr>
</tbody>
</table>

---

**GENERAL**

One or more employees
## Steps

3. **On the Select Report tab**, click the plus (⁺) to display a category’s contents.

   - All
     - Absent Employees
     - Accrual Balances and Projections
     - Accrual Detail

4. Click a report name and review its description at the bottom of the page to ensure that the report returns the data you need.

5. If you selected employees in a Genie, verify that **Previously Selected Employee(s)** appears in the **Show** field. Or select a different set of employees from the **Show** drop-down list.

6. Select the specific time period from the **Time Period** drop-down list.

7. Select one or more of the additional options to identify the report information you need.  
   **Note**: The options can vary depending on the report.

8. Click **Run Report**.
Steps

9. Review information in the Status column. Click Refresh Status.

10. Click View Report.

The following is an example of an Employee Transactions and Totals report.