

Work Area Creation Checklist

Introduction

This document can be used to help ensure that a work area created in Quali Time is properly created per the intent of the department.

Pre-Creation Checklist

- Identify the work area approvers and list their user IDs. This defines the first approver of the timesheet.
- Identify the organization the work area will be listed under. This will define the payroll processor for the work area.
- Identify if you want to include any reviewers. They will be able to see the timesheet and make edits but will not be able to approve the timesheet.
- Determine what the appropriate overtime earn code should be. It can be Compensatory Time (CPE) or Overtime (OVT)
- Determine if you want the work area to be clock entry or manual entry. Then check the org code in the Time Collection Rule lookup to see if your org is different from the default for your campus. For assistance with the Time Collection Rule lookup, please see the KT documentation on the FMS website.
- Determine if you want any tasks assigned to the work area. Tasks will subdivide your work area into multiple assignments for your employees. An assignment for your employees constitutes the pairing of a work area, task, and record number (or job).
- Determine the effective date for your work area. Your employees will not be able to record hours into a work area until the effective date has passed.
- Determine if there is a need for a clock location rule that should be applied at the work area level. If an employee has a clock location rule already assigned to them, a clock location rule at the work area level will provide additional locations the employee can clock from.

Creation Checklist

- Initiate a new work area document and complete the required fields on the document
 - Add all relevant supervisors and approvers
- Initiate Clock Location Rule documents as appropriate for the work area and employees in the work area
- Initiate Automatic Lunch Deduction rules as appropriate for the work area and employees in the work area
- Initiate Maintain Job Data document for each job that will be under the new work area
 - Assign all relevant tasks and work areas to the job

Post-Creation Checklist

- Confirm that all Maintain Job Data documents reach final status.
- Confirm that all Quali Time documents reach final status.
- Verify a sample of employees within the new work area to ensure clock entry or manual entry is working as intended. Review time collection rules to verify any exceptions are applied correctly if there are any issues.
- Verify that all employees are listed in the newly created work area in Quali Time. Review Maintain Job Data document to ensure they are finalized if there are any issues
- Verify a sample of employees that any clock location rules and lunch deduction rules are applying correctly. Review document status if any issues arise.