PERSON Tab

Licenses (should have 3):
- Workforce Timekeeper (checked by default)
- Workforce Manager (needs to be checked)
- Workforce Employee (checked by default)

Accruals & Leave
Choose the appropriate Accrual Profile and make sure the Full-Time Equivalency Percentage equals the total appointment percentage for the employee (across all departments).

Contacts
Fill in the employee’s email address and check the box for “Receives notifications via e-mail address.”

JOB ASSIGNMENT Tab

Primary Account
In the Primary Account box:
1) Choose the drop down under Primary Account and click Search...
2) Choose the correct information for each of the 7 items (Project Code, Cost Center and Special Function should be set to “0” if you are not using them). The Access Control number should be the number corresponding to this employee’s supervisor.
3) Click OK.
4) Add today’s date as the Effective Date.

Reports To drop down only shows people who have been assigned a Manager license. This can be filled in later if the Manager has not been setup yet.

Timekeeper
- Worker Type – Choose the correct worker type.
- Pay Rule box – choose the correct pay rule for the employee and set today as the Effective Date.

Access Profiles
- Function Access Profile should be set to UCSB Supervisor. *(If the employee is a Faculty member that will not keep his/her own timecard, use UCSB Supervisor – Approve Only)*
- Leave everything else on this screen as is.

Manager Role – General
- Employee Group – choose the group with the title that matches this employee’s title.
- Check off the “Can See transferred employees” box.
- Labor Level Transfer Set – leave as Empty Profile.
- Pay Codes “Edit” Profile – set to “Supervisor”.
- Pay Codes “View” Profile – set to “All Pay Codes”.
- Work Rule Profile – leave as Empty Profile.
- Reports Profile – set to Supervisor.
- Check the box for “Can Approve Overtime Request”.

Employee Role
- Labor Level Transfer Set – leave as Empty Profile.
- Time Entry Method – set to Hourly View.
- Pay Codes “Edit” Profile – choose “Exempt Employee” or “NE Hours Worked Employee” (should be “Empty Profile” for Faculty).
- Work Rule Profile – leave as Empty Profile.
PERSON Tab

Licenses (should have 2):
- Workforce Timekeeper (checked by default)
- Workforce Employee (checked by default)

Accruals & Leave
Choose the appropriate Accrual Profile and make sure the Full-Time Equivalency Percentage equals the total appointment percentage for the employee (across all departments).

Contacts
Fill in the employee’s email address and check the box for “Receives notifications via e-mail address.”

JOB ASSIGNMENT Tab

Primary Account
In the primary Account box:
1) Choose the drop down under Primary Account and click Search...
2) Choose the correct information for each of the 7 items (Project Code, Cost Center and Special Function should be set to “0” if you are not using them). The Access Control number should be the number corresponding to this employee’s supervisor.
3) Click OK.
4) Add today’s date as the Effective Date.

Reports To drop down only shows people who have been assigned a Manager license. This can be filled in later if the Manager has not been setup yet.

Timekeeper
- Worker Type – Choose the correct worker type.
- Pay Rule box – choose the correct pay rule for the employee and set today as the Effective Date.

If the employee will use a time clock to clock in/out, also set
- Device Group – to the correct “…All Clock” group.
- Badge Number – make sure the employee’s badge number is correct (students use their PERM number, which should automatically import from LDAP; staff use the number on the campus-issued ID badge).

Access Profiles
Function Access Profile should be set to one of the “UCSB Employee -…” options:
- UCSB Employee – pay code and punch edit (can add/edit pay codes and punches on own timecard).
- UCSB Employee – timestamp (for employees who clock in on the computer, will take them directly to the timestamp button upon login).
- UCSB Employee – view and approve (for employees who use a time clock; can only view and approve the timecard on the computer).

Display Profile – change to “Timecard” for all but timestamp employees.

Employee Role
- Labor Level Transfer Set – leave as Empty Profile.
- Time Entry Method – set to “Hourly View” or “Time Stamp & Hourly View” (if employee can clock in/out at the computer).
- Pay Codes “Edit” Profile – choose “Exempt Employee” or “NE Hours Worked Employee”.
- Work Rule Profile – leave as Empty Profile.