Workforce Dimensions

Manager Tasks and Outcomes:
Timekeeping and Basic Scheduling

Exercise Workbook

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Published by Kronos Incorporated
900 Chelmsford Street, Lowell, Massachusetts 01851 USA
Phone: 978-250-9800
Kronos Incorporated Global Support: 1-800-394-HELP (1-800-394-4357)

Workforce Dimensions
Manager Tasks and Outcomes: Timekeeping and Basic Scheduling
Document Revision

Revision	Document Release Date
TTT B	November 2019

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About this Training

This training is designed to give you the basic skills necessary to begin using the Workforce Dimensions solution.

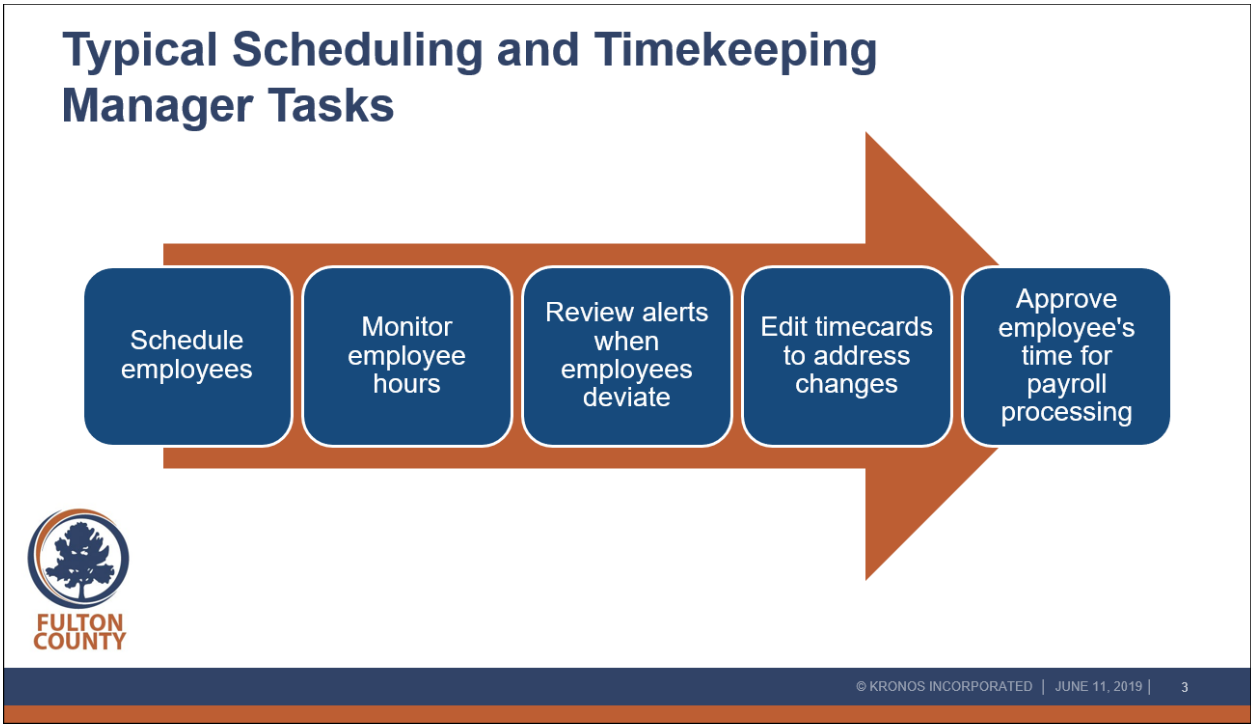
Learning Objectives

After completing this course, you should be able to:

- Review Navigation
- Review Notifications in Control Center
- Begin building a future schedule:
    - Assign schedule patterns to employees who work regular schedules
    - Add, edit and delete shifts
    - Add a paycode to an entire shift and part of a shift
    - Schedule shift transfers
- Prepare timecards for payroll:
    - Add punches
    - Enter transfers in the timecard
    - Address timecard exceptions
    - Approve timecards

Accessing Exercises

This course uses captured exercises for hands on practice.



Of course, these sample tasks are not all-inclusive, are rarely consecutive, and often overlap between Scheduling and Timekeeping. This means that they usually must be handled daily within both modules. For example, during this training we will look at a day in the life of a manager and see how they:

- Interact with tiles on his Home page, and with Dataviews
- Work on a future schedules
- Monitor employee hours as they are worked
- Review and takes action on notifications in Control Center
- Edit timecards to address changes
- Approve employees' time for payroll processing

Introductions

Michael Martin is a manager with a large group of employees. He is very busy, so he is excited to use Workforce Dimensions to help with his managerial tasks Using Workforce Dimensions, he can:

- **Use Home page tiles and Dataviews to monitor and work with data**
- **Review and respond to notifications**
- **Manage employee schedules**
- **Manage employee timecards**

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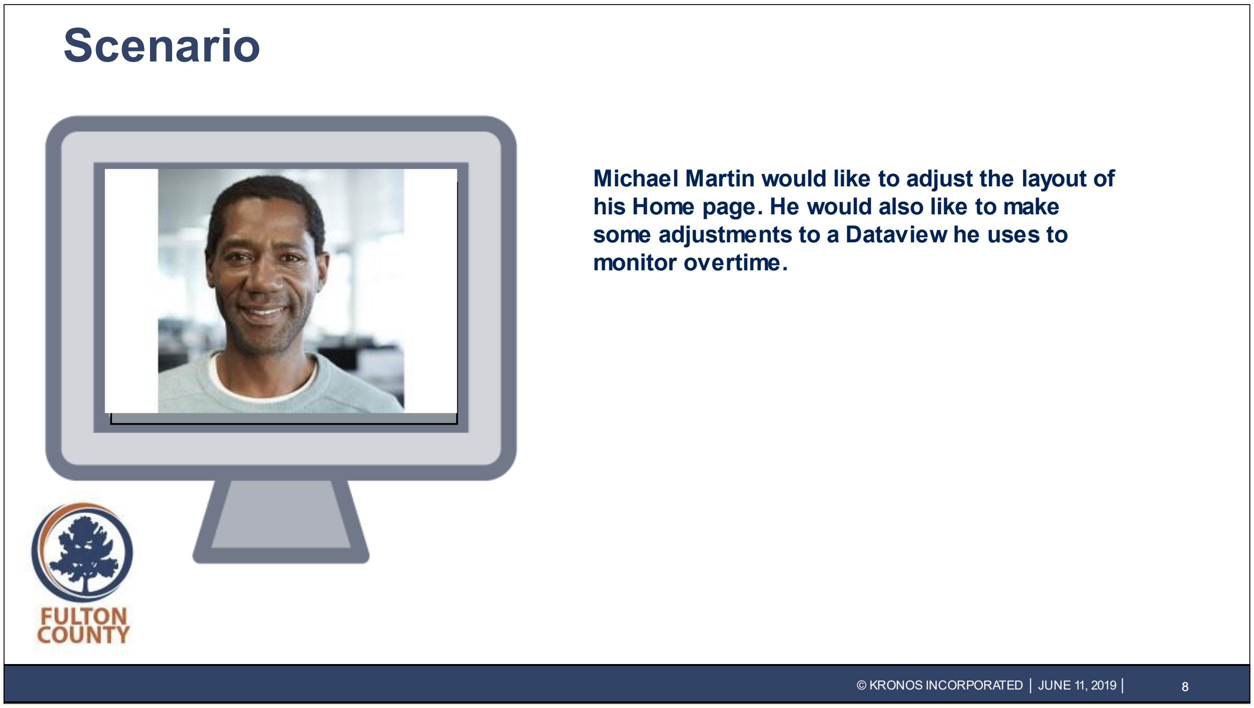
As Michael Martin, a Department Manager, you will begin by becoming familiar with the Home page, Dataviews, and Control Center. Next, you will start building and modifying a schedule for the next schedule period. Then you will take a break from the future schedule to do some daily maintenance on your employees' timecards.

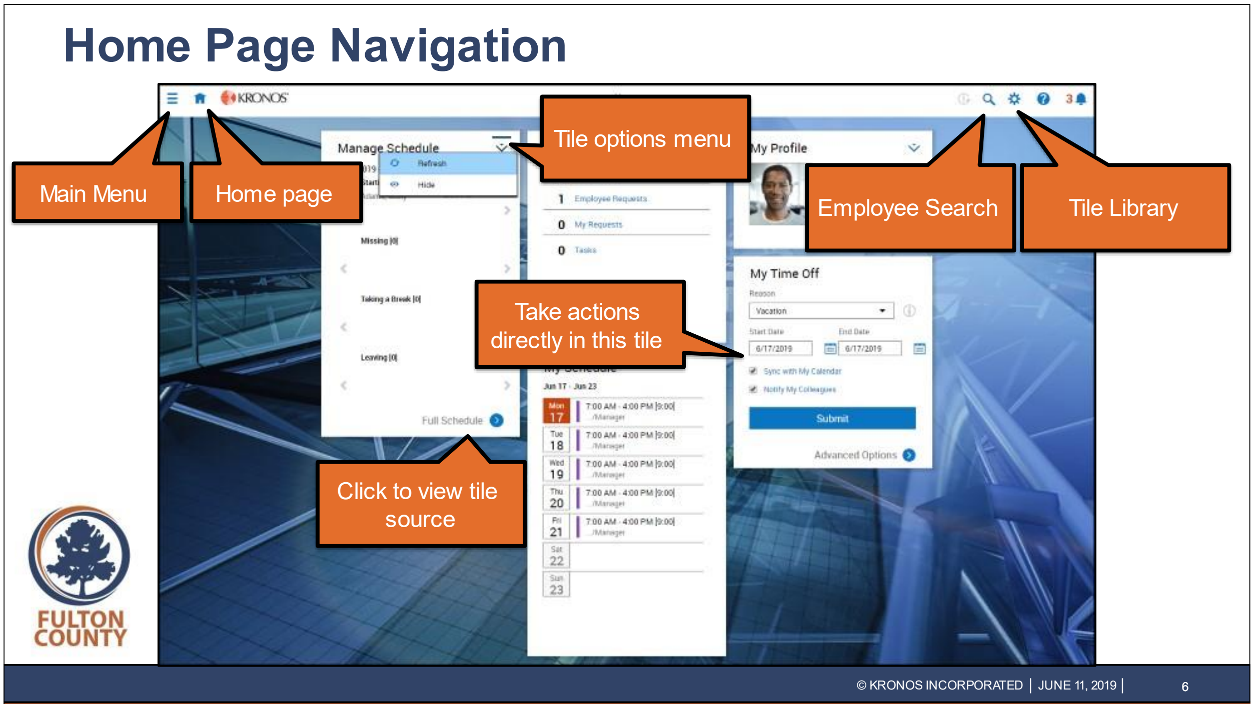
Navigation

Navigation

In this section, you will be introduced to navigating Home pages and Dataviews. After that, you will have an opportunity for hands-on practice to see how to apply those concepts.



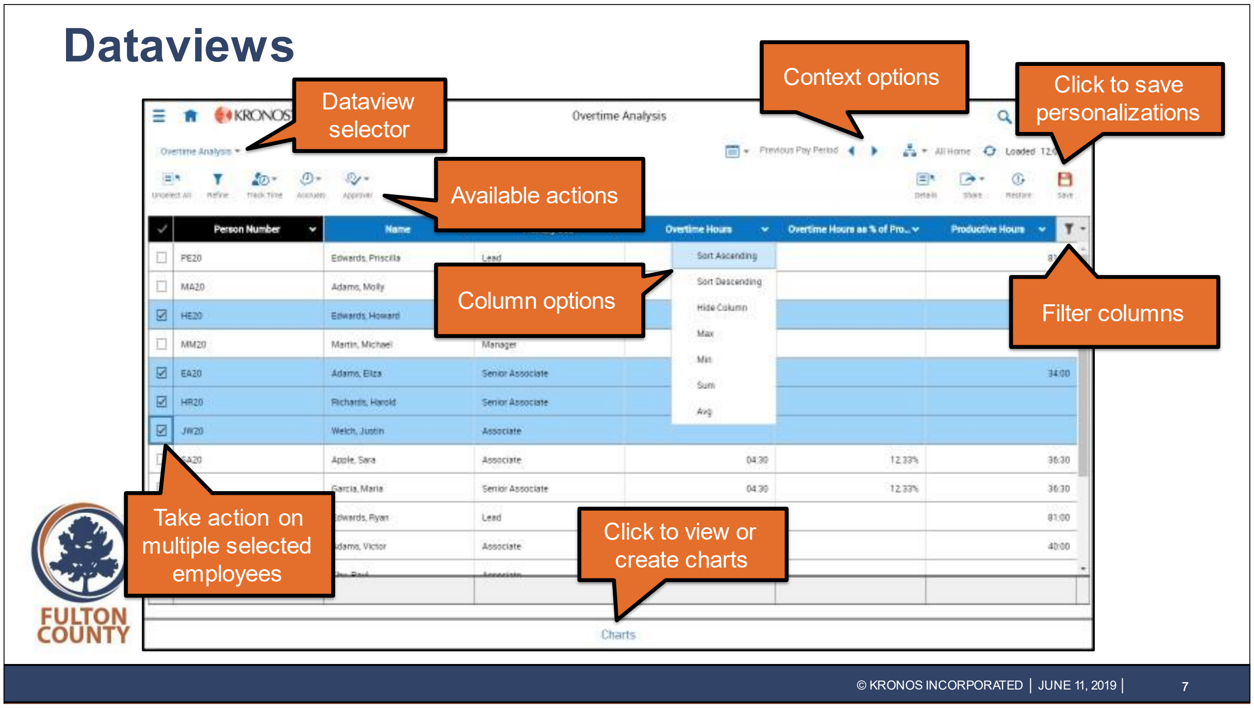
Michael Martin would like to adjust the layout of his Home page. He would also like to make some adjustments to a Dataview he uses to monitor overtime.



Your Home page is the first thing you will see each time you log in to Workforce Dimensions. This is Michael Martin's Home page. On the Home page, Michael can:

- Take action directly in a tile.
  - For example, Michael can submit a time-off request from the My Time Off tile.
- Use a link in tile to go to the source page for that tile.
  - For example, Michael can click Full Schedule to go to the Current Schedule page.
- Hide and show tiles.
  - For example, Michael can hide the My Profile tile to clean up his Home page, and/or choose additional tiles to show.
- Open the Main Menu to access other pages.
  - For example, Michael can access timecards, Dataviews, and reports through the Main Menu.

Note that Michael can return to the Home page from any other Workforce Dimensions page by clicking the Home page icon.



Dataviews are accessed in the Dataview Library, found in the Dataviews & Reports section of the Main Menu. Michael uses Dataviews to review, analyze, and act on vast amounts of data in Workforce Dimensions. Using a Dataview, Michael can:

- Take action on a selected subset of employees.
    - For example, Michael can select several employees and then use the Approval action to approve all their timecards.
- Sort and filter a column.
    - For example, Michael could filter out all employees who have no Overtime Hours.
- Add a calculation to a column.
    - For example, Michael could create a calculation that displays the average number of Overtime Hours for all displayed employees.
- Create or view a chart.
    - For example, Michael could create a chart that displays a graph of Overtime Hours by employee.

Note that Michael can click Save to keep any personalizations he has made to a Dataview (or click Restore to go back to the default settings). Some Dataviews display business structures instead of employees. In these Dataviews, you view and work with aggregated data from several business units, such as departments or facilities. Michael can use the Dataview selector to view a different Dataview, without having to use the Main Menu.

Navigate the Home Page

1. After Michael accesses Workforce Dimensions, he is brought to his home page.
2. In the **My Profile** tile, click the drop-down arrow and select **Hide**.
   Notice the My Profile tile no longer appears on the Home page.
3. Tiles can be rearranged on the Home page by dragging them to new positions. We will demonstrate moving the My Time Off tile so it is above the My Notifications tile.
   Notice the tiles are rearranged so that the **My Time Off** is now above the **My Notifications** tile.
4. Click the **Employee Search** icon .
5. Type **Adams** in the search field and then press **Enter**.
6. Select the checkbox for **Adams, Eliza**.
7. Click **Go To** and select **Timecard**.
   Notice Eliza's timecard opens.
8. Click the **Home** icon to return to the Home page.
9. In the **Manage Schedule** tile, click **Full Schedule**.
   Notice the Schedule Planner opens.
10. After viewing the schedule, click the **Home** icon to return to the Home page.
11. Click the **Main Menu** to access another Workforce Dimensions page.
12. Click to expand the **Time** section of the main menu and select **Employee Timecards**.
    Notice that the Employee Timecards page opens.
13. After viewing the Employee Timecards page, click the **Home** icon.

Exercise: Navigate a Dataview

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Navigate a Dataview

Michael Martin would like to access the Overtime Analysis Dataview to examine any overtime hours.

1. Click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Click to expand the **Dataviews & Reports** section of the main menu and select **Dataview Library**.
3. Click the **Overtime Analysis** link.
4. Ensure that **Previous Pay Period** is selected for the timeframe.
5. Click the **Person Number** column's drop-down list and select **Hide Column**.

   Notice that this hides the column.
6. Click the **filter** icon to the right of the column headers row and select **Primary Location** from the list.

   Notice that this displays the additional column.
7. Click the **Primary Job** column header and drag to the left until it is between the **Name** column and the **Primary Location** column.
8. To filter **Overtime Hours** to include only those rows that are not null, click the **filter** icon again and select **Show Filters Row**.
9. At the top of the **Overtime Hours** column, click the drop-down list and select **Is Not Null**.

   Notice that this filters out any employee data row that has no Overtime Hours value.

[Continued on following page]

10. Click the **filter** icon and select **Hide Filters Row**.

    Notice that the filter remains in effect.

11. At the top of the **Overtime Hours** column, click the drop-down list and select **Sort Ascending** to set the sort order.

12. At the top of the **Overtime Hours** column, click the drop-down list and select **Sum** to total the Dataview column.

    Notice that this creates a calculation at the bottom of the column, showing the total overtime hours for the pay period.

13. At the top of the **Primary Location** column, click the drop-down list and select **Group by this Column**.

    Notice that the sum of overtime hours is now calculated for the group.

14. Click the arrow to the left of the last group name to expand the group.

    Notice that the employees in this group are still sorted in ascending order by Overtime Hours.

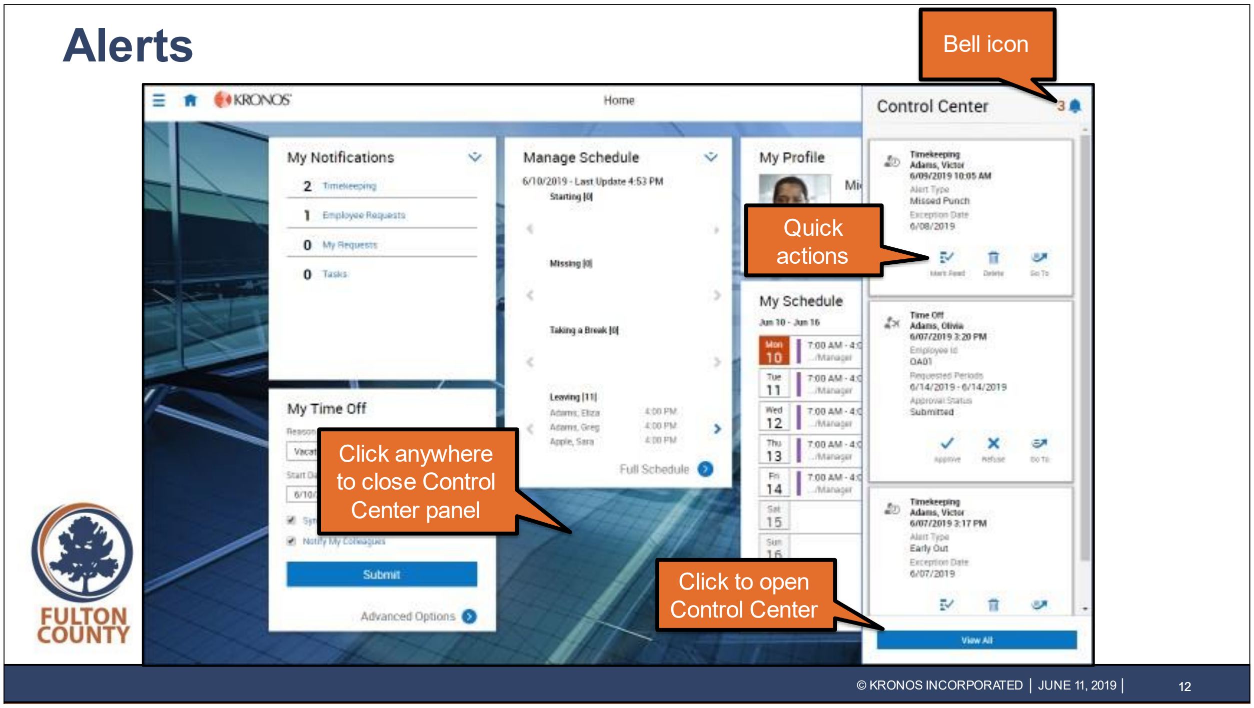
15. Click **Save** to retain this personalization.

Notifications

Notifications

This section covers reviewing notifications in Control Center. After that, you will have an opportunity for hands-on practice to see how to apply those concepts.

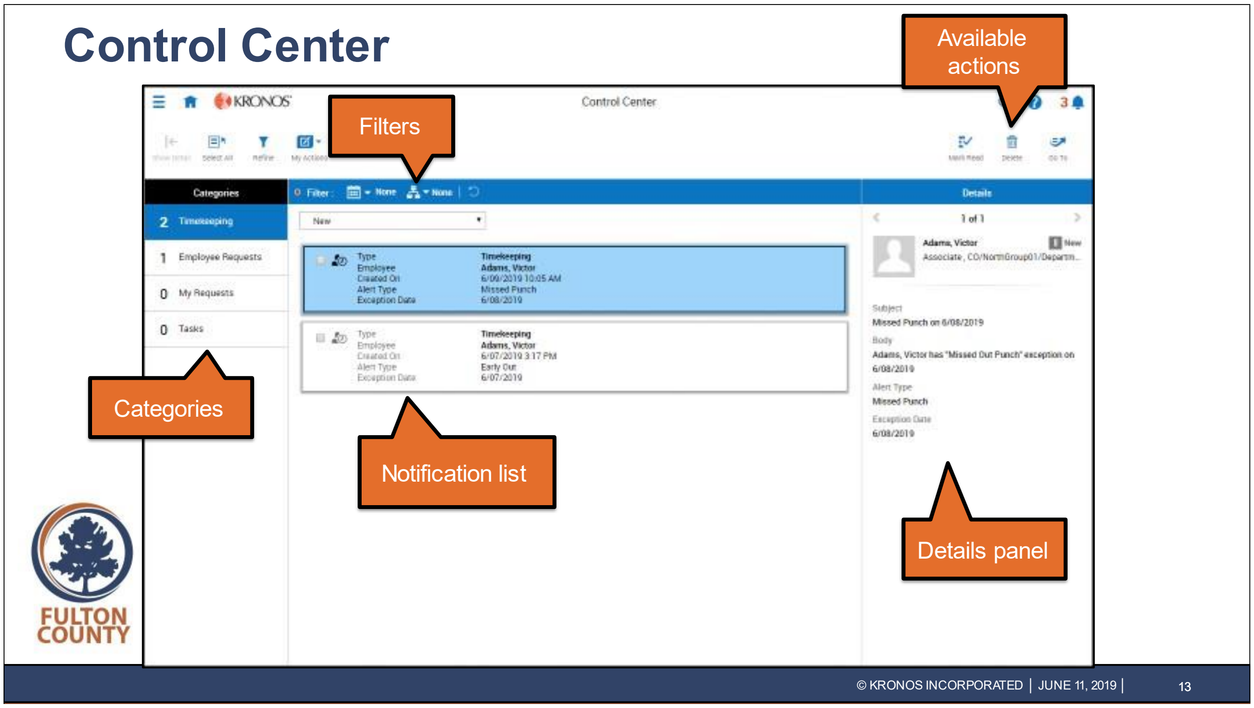
Michael Martin wants to review any notifications he has received so he can handle exceptions and other noteworthy items in a timely manner.



Alerts appear in the corner of all of Michael's Workforce Dimensions pages. Clicking the bell icon opens the Control Center panel. With Alerts, Michael can:

- View the number of notifications he has not yet reviewed or acted on.
    - For example, in the above screenshot Michael can see that he has 3 notifications he has not yet handled.
- Mark individual notifications as reviewed, or take action on appropriate notifications directly from the panel.
    - For example, Michael can review an employee's exception and access timecards for more detail.
- Go to the Workforce Dimensions page relevant to a notification.
    - For example, by clicking Go To for an Exceptions notification Michael can immediately open the employee's timecard with the relevant date and punches displayed.
- Click View All to access Control Center, where he can view notifications by category and in greater detail.
    - For example, Michael can see the details or review older notifications he has already handled and that no longer appear in the panel.

Note that Michael can close the Control Center panel by clicking anywhere outside the panel.



While the Control Center panel provides Michael with a quick view of his most immediately notifications, the Control Center panel is where Michael goes to view notifications in greater detail or to look up notifications he has already handled in the past. With Control Center, Michael can:

- View notifications by category.
    - For example, Michael can review the Employee Requests category so he can deal with those notifications immediately.
- Filter the list of notifications.
    - For example, Michael can filter the notification list so that only notifications received on a certain date or dates appear.
- Review the details of the selected notification in the Details panel.
    - For example, Michael can review any comments or additional information submitted.
- Take action on the selected notification.
    - For example, Michael can use any of the action icons appearing above the Details column.

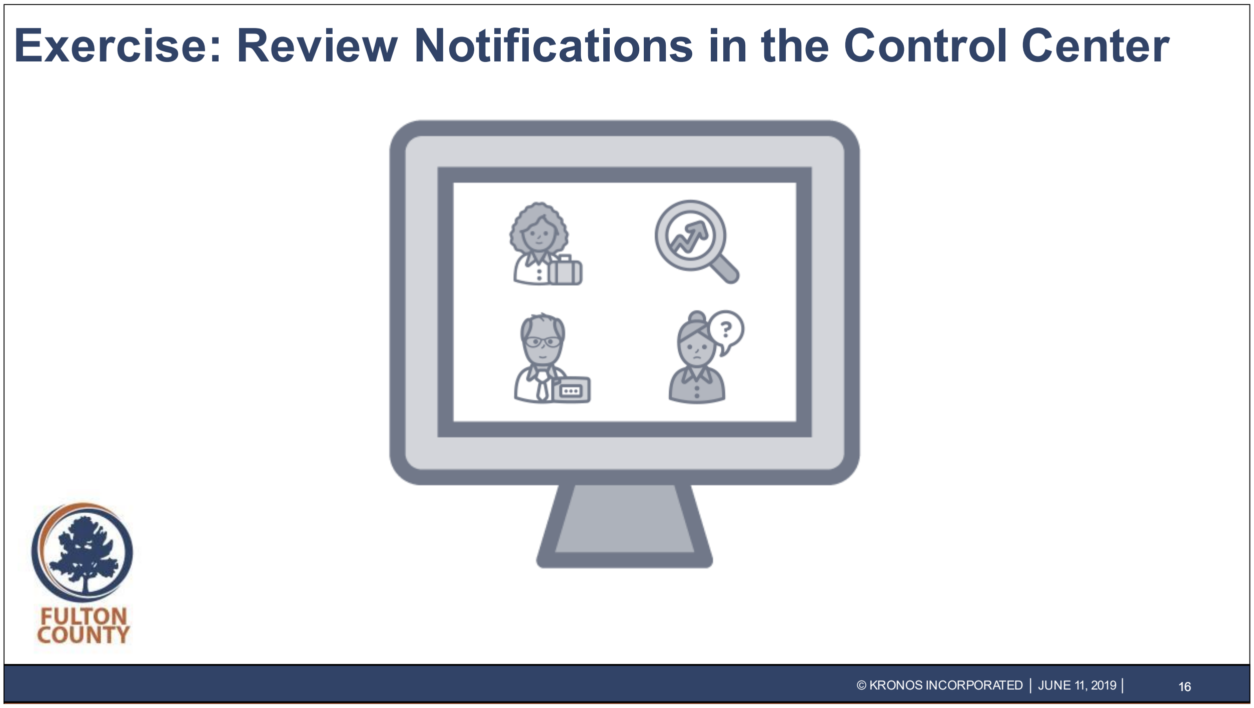
Review Alerts in the Control Center Panel

Michael Martin needs to review notifications in the Control Center panel.

1. On the **Home** page, notice the number next to the **bell icon**, indicating how many notifications you have not yet addressed. Click the **bell icon** to open the Control Center panel.
2. Michael is aware that Victor worked an unscheduled shift last Saturday from 10:00 am to 3:00 pm. Locate the notification regarding Victor Adams's **Missed Punch** and click **Go To**.

   Notice that Victor's timecard opens.
3. In Victor Adams's timecard, click the **Saturday Out** cell with the missing punch and type **3:00pm**, then press **Enter**.
4. Click **Save**.

   Note that correcting the missed punch does not automatically decrement the number next to the bell icon (nor does it remove the notification from the list).
5. To remove the notification, click the **bell icon**, locate the notification regarding Victor's **Missed Punch**, and click the **Mark Read** icon for that notification.
6. A **Success** message displays at the top of the panel. To return to the Home page, click the **Home** icon.



Review Notifications in Control Center

Michael Martin would like to access the Control Center to review additional details of his notifications and take action on a time-off request.

1. Click the **bell icon** to open the **Control Center** panel.
2. In the panel, click **View All** to open **Control Center**.
3. Select the **Employee Requests** category on the left side of the page.
4. Select **Olivia Adams'** time-off request.
5. Click the **Accruals** section in the **Details** panel to view additional information.

   Note the actions that you could take on this request are displayed above the **Details** panel. Those that are grayed out are not applicable to this request.
6. In this case, Michael would like to review the schedule before making a decision about this request; click the **Pending** icon to mark the request as pending.
7. Let's take a look at another category. Select the **Timekeeping** notification category.
8. Open the **Timeframe** filter and select **Last 30 Days** to limit the notifications to only those received within the last 30 days.
9. Click the drop-down list directly under the timeframe filter that currently displays the **New** option and select **Read** instead.

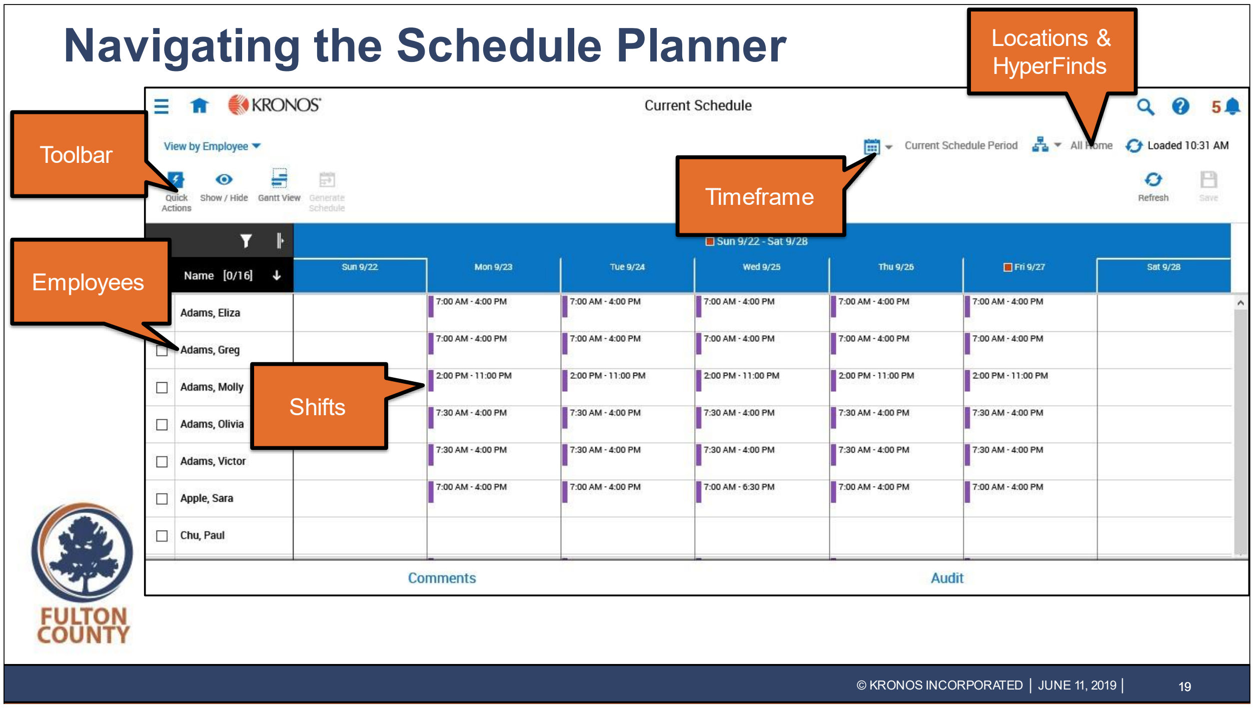
   Notice that this displays Timekeeping notifications you have marked read in the past. In this instance, you will see Victor Adams' Missed Punch notification that you reviewed earlier.
10. To return to the Home page, click the **Home** icon.

Scheduling

Scheduling

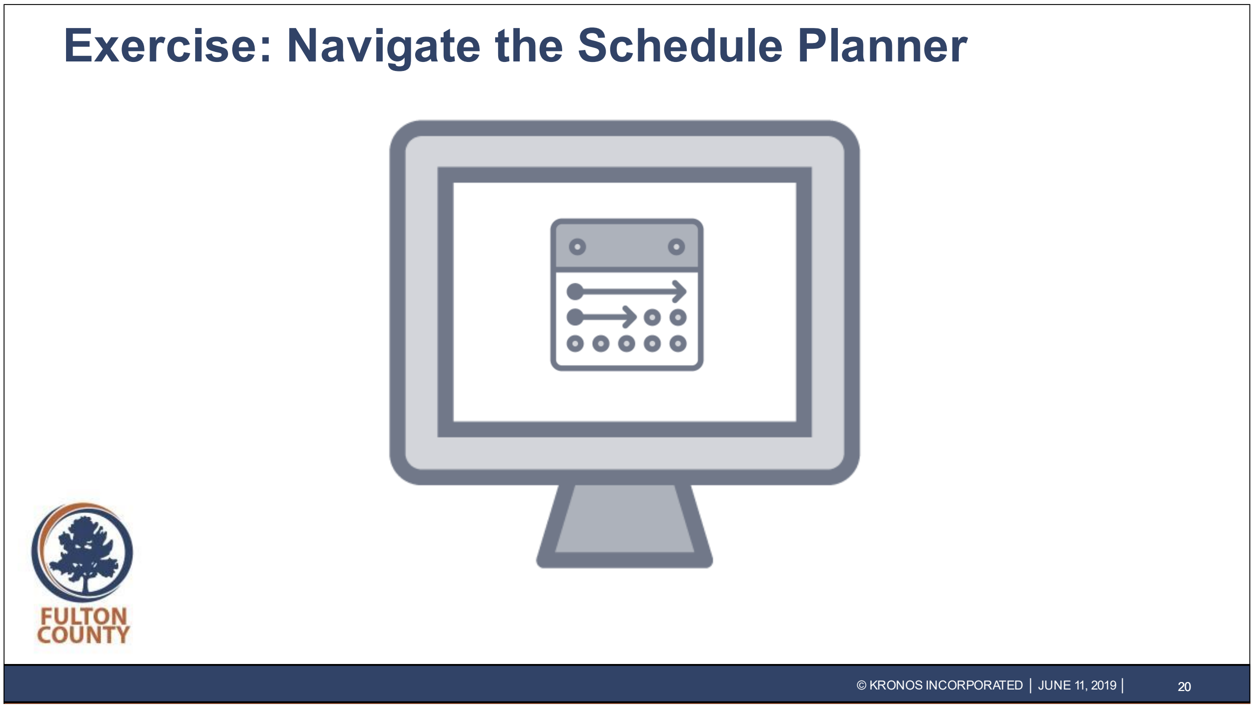
In this section, you will be reintroduced to common Scheduling concepts. After that, you will have an opportunity for hands-on practice to see how to apply those concepts.

Michael Martin has reserved some time today to begin building the schedule for the next schedule period.



The Schedule Planner has many tools available to assist you in quickly creating and managing employee schedules. The Schedule Planner includes:

- Toolbar:
  - Allows you to take action on employee shifts.
- Timeframe:
  - Allows you to determine the timeframe you want to view, such as the current schedule period or a next schedule period. The timeframe you select determines what you see in the grid. Select Range allows you to enter a start and end date for a specific timeframe.
- Locations & HyperFinds:
  - Allows you to determine which group of employees display in the schedule grid.
- Employees:
  - Displays a list of employees.
- Shifts:
  - Displays any scheduled shifts by day for each employee in the list as applicable.



Navigate the Schedule Planner

Michael Martin would like to access and navigate the Schedule Planner.

1. On the **Home** page, click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Click to expand the **Schedule** section of the main menu.
3. Click the **Current Schedule** link.
4. Click the **Show / Hide** button in the top left corner to see the display options available.

   Notice the Show / Hide panel opens.
5. Click **Cancel** to close the Show / Hide panel.
6. Click the **Table View** button in the top left corner of the schedule.

   Note the schedule grid view changes.
7. Click the **Gantt View** button in the top left corner to return to the previous view.
8. Click the **Current Schedule Period** timeframe link in the top right of the schedule.
9. On the **Timeframe** list, select **Next Schedule Period**.

Schedule Patterns

Often, employees work the same hours and days of the week. Pattern templates allow you to assign a specified rotation of shifts to one or more employees, so that those shifts automatically populate their schedules.

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	
	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	
	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	7A – 3:30P	
	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	3P – 11:30P	

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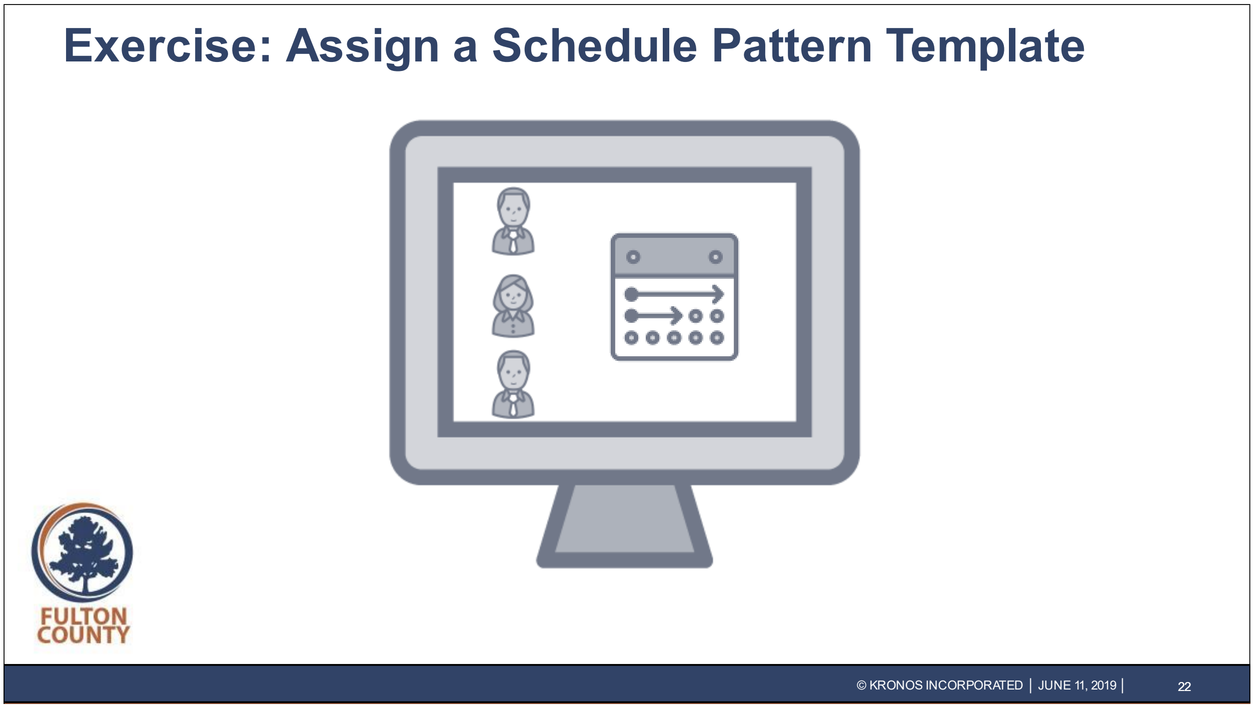
Example: an employee has a two-week schedule of alternating shifts:

- One week: 7:00 a.m. – 3:30 p.m., Monday – Friday
- Next week: 3:00 p.m. – 11:30 p.m., Monday – Friday

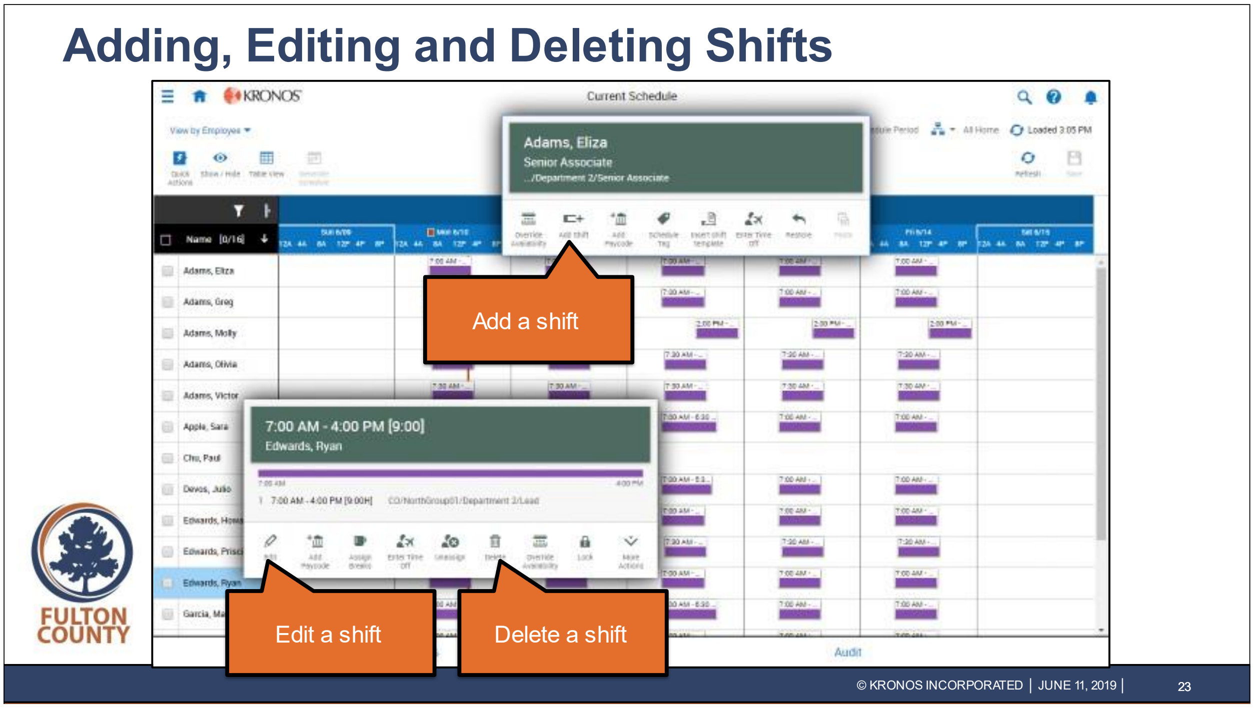
Their manager can assign a schedule pattern template to them so that their schedule will remain in place.



Assign a Schedule Pattern Template

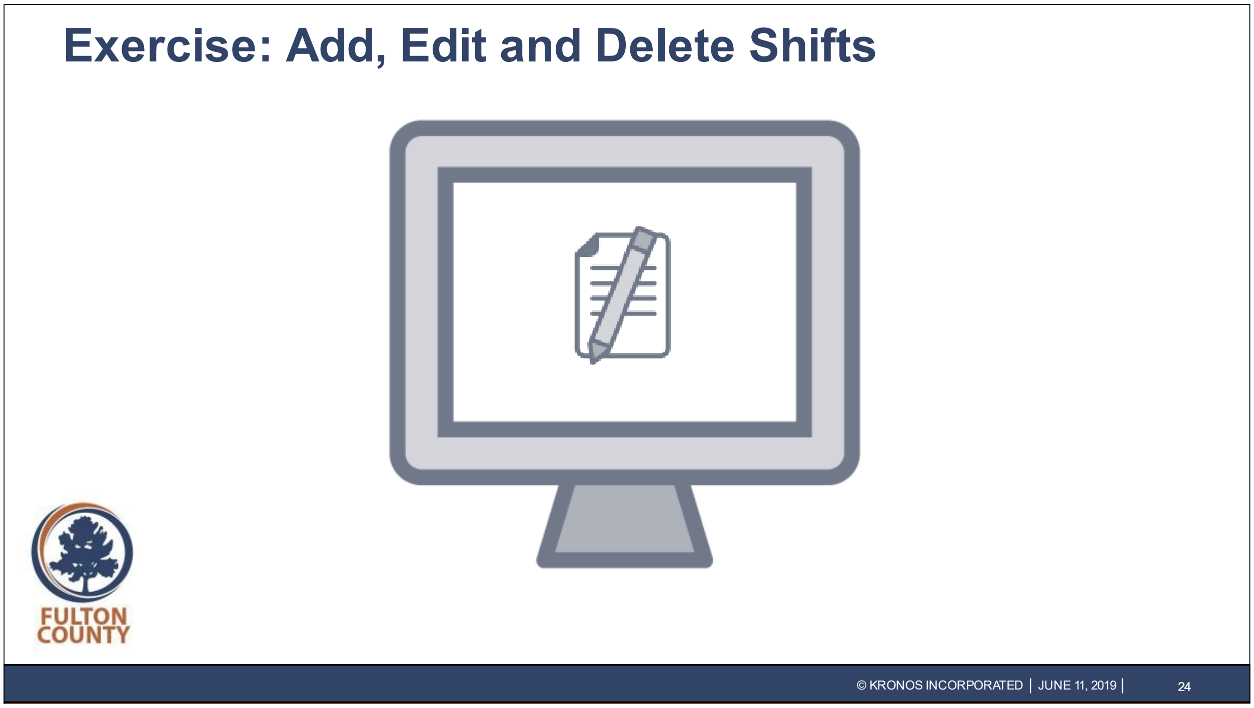
Michael Martin would like to use a Pattern Template to assign a recurring schedule to three employees.

1. Scroll down to view employees to be assigned a **Schedule Pattern.**
2. Click the **checkbox** next to the employee names to select **Paul Chu**, **David Reyes**, and **Harold Richards**.
3. With your cursor over one of their names, right-click and select **Schedule Pattern**. The Schedule Pattern dialog box appears.
4. Click the **Pattern Template** drop-down list at the top of the screen and select **Day730 (Day shift 7:30a start)**.
5. For the **Start Date**, click the calendar icon and select the **first Sunday** in the next schedule period (highlighted in blue).
6. Verify that the **End Date** is **Forever**.
7. Verify that **Define Pattern For** is **1 Week(s)**.
8. Verify that the **Override Other Patterns** checkbox is selected.
9. Verify the **Start Pattern On** is set to **Week 1**.
10. Click **Apply**.
11. Click **Save**.



To modify a schedule, Michael Martin can:

- Add an ad hoc shift or use quick actions to add a pre-defined shift.
    - For example, Michael can add hours to an employee's schedule when extra hours are needed to fulfill a business need.
- Edit existing shifts when changes are necessary.
    - For example, Michael can change the end time if an employee agrees to stay later than scheduled.
- Delete a shift.
    - For example, Michael can remove scheduled hours from an employee's schedule if he or she is not needed on that day.



Add, Edit and Delete Shifts

Michael needs to make some changes to the schedule for the upcoming schedule period.

Paul Chu will work an additional two hours on Wednesday of next week, and Michael must change the end time of his shift.

1. Click the **Timeframe** link in the top right of the screen, scroll up and select **Next Schedule Period**
2. Double-click Paul Chu's **Wednesday** shift to open the **Edit Shift** panel.
3. Click the **End Time** field and type **6:00pm**, then press **Enter**.
4. Click **Apply**.
5. Click **Save**

   Notice that the shift end time has been changed to 6:00 PM on the schedule grid.

Justin Welch will work a shift on Thursday of next week and Michael must add this shift.

6. Scroll Down to view additional employees.
7. On Justin Welch's row, double-click the **Thursday** column to open the **Add Shift** panel.
8. Click the **Start Time** field type **7:00am**, then press **Enter**.
9. Click the **End Time** field and type **12:00pm**, then press **Enter**.
10. Click **Apply**.
11. Click **Save**

    Notice that the shift has been added to Justin Welch's schedule for Thursday.

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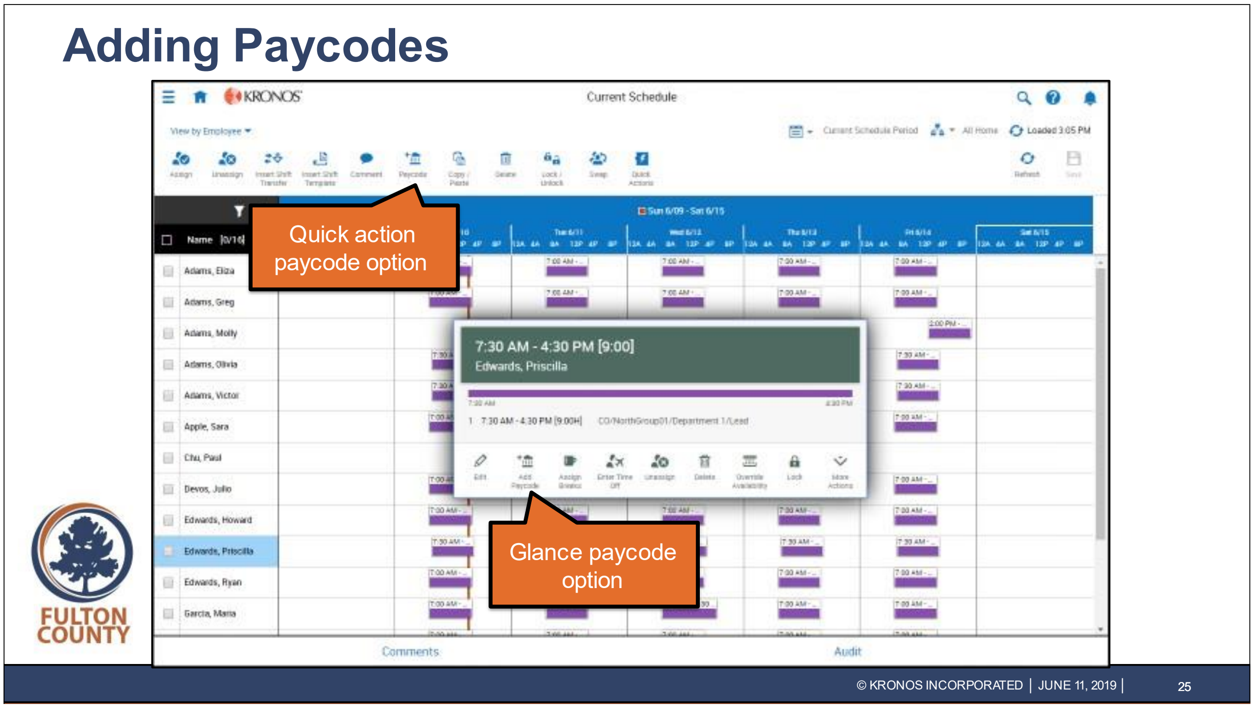
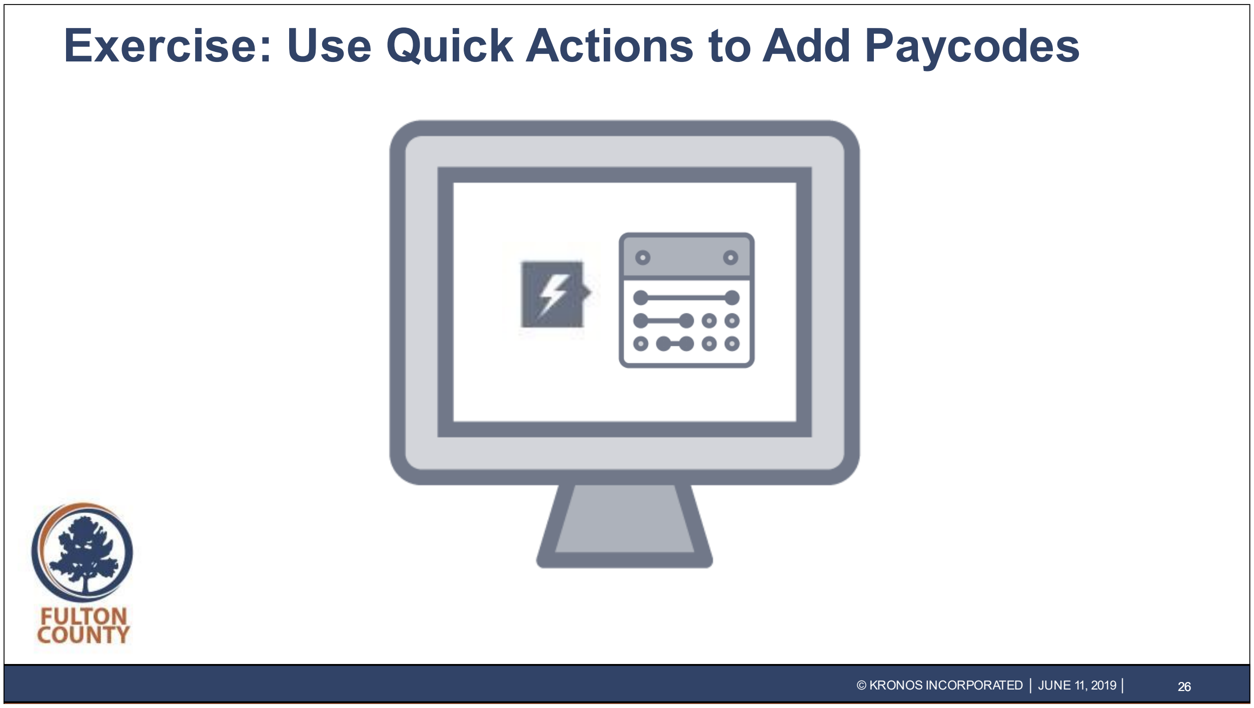
Michael would like to delete David Reyes' shift on Thursday of next week.

12. On David Reye's row, right-click his **Thursday** shift, and then select **Delete**.
13. Click **Save**.



When working on a schedule, Michael Martin can:

- Use a quick action to override a regular shift with a paycode.
    - For example, Michael can change a regular, productive shift to non-productive training hours.
- Add a paycode to part of a shift.
    - For example, Michael can replace part of a shift with paycode hours when an employee needs to leave early for a medical appointment.

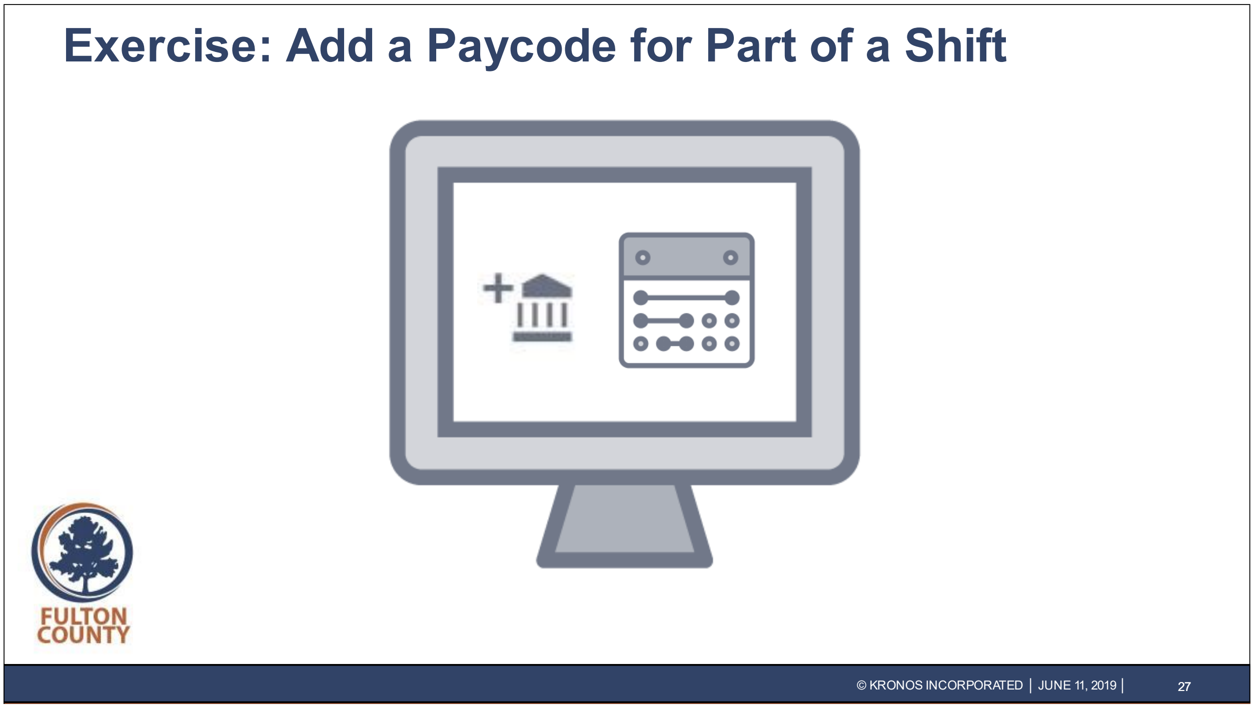


Use Quick Actions to Add Paycodes

Michael Martin would like to use Quick Actions to add training hours to the schedule for Paul Chu and Harold Richards in the upcoming schedule period.

1. Click the **Quick Actions** icon at the top left of the screen to display the Quick Action options.
2. Click the **Paycode** button.
3. Select **Training** from the list.
4. The cursor changes to a black +. Click **Paul Chu's** scheduled shift on **Friday**, scroll down, and then click **Harold Richards's** scheduled shift on **Friday**.

   Notice that their regular hours have been replaced with the Training paycode.
5. Click the **Paycode Quick Action** button again to turn off the function.
6. Click the **Quick Actions** icon again to close the menu.
7. Click **Save**.

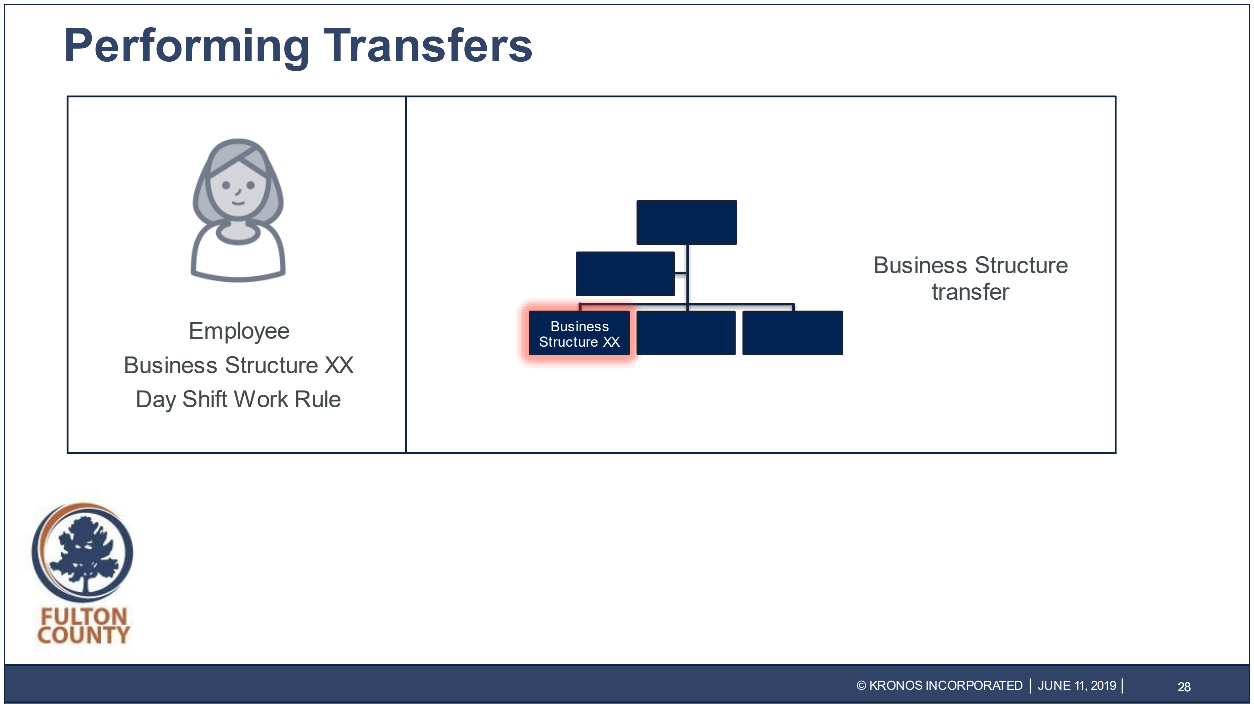


Add a Paycode to Part of a Shift

David Reyes has an appointment next Tuesday morning and Michael needs to override part of David's shift with the Absent paycode.

1. Click the Timeframe icon, scroll up, and then select **Next Schedule Period**.
2. Scroll down to locate David Reyes.
3. Right-click the shift for **David Reyes** on **Tuesday**.
4. Click the **Add Paycode** button.
5. On the **Add Paycode** panel, click the **Paycode** drop-down list and select **Absent**.
6. Verify that the Start Time is David's regular start time of **7:30 AM**.
7. Click the **Duration** drop-down list and select **Half Schedule Day**.
8. Ensure that **Override Shift** is checked and that **Partial Shift** is enabled.
9. Deselect **Create Open Shift**.
10. Click **Apply**.

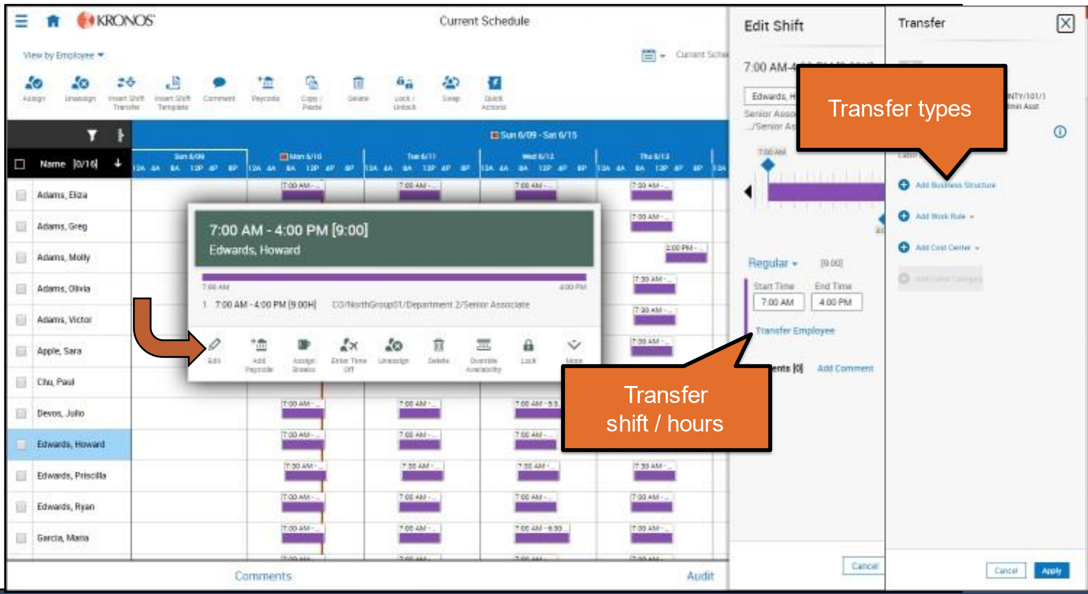
    Notice that the first part of David's shift is now shaded green (for paycode).
11. Click **Save**.



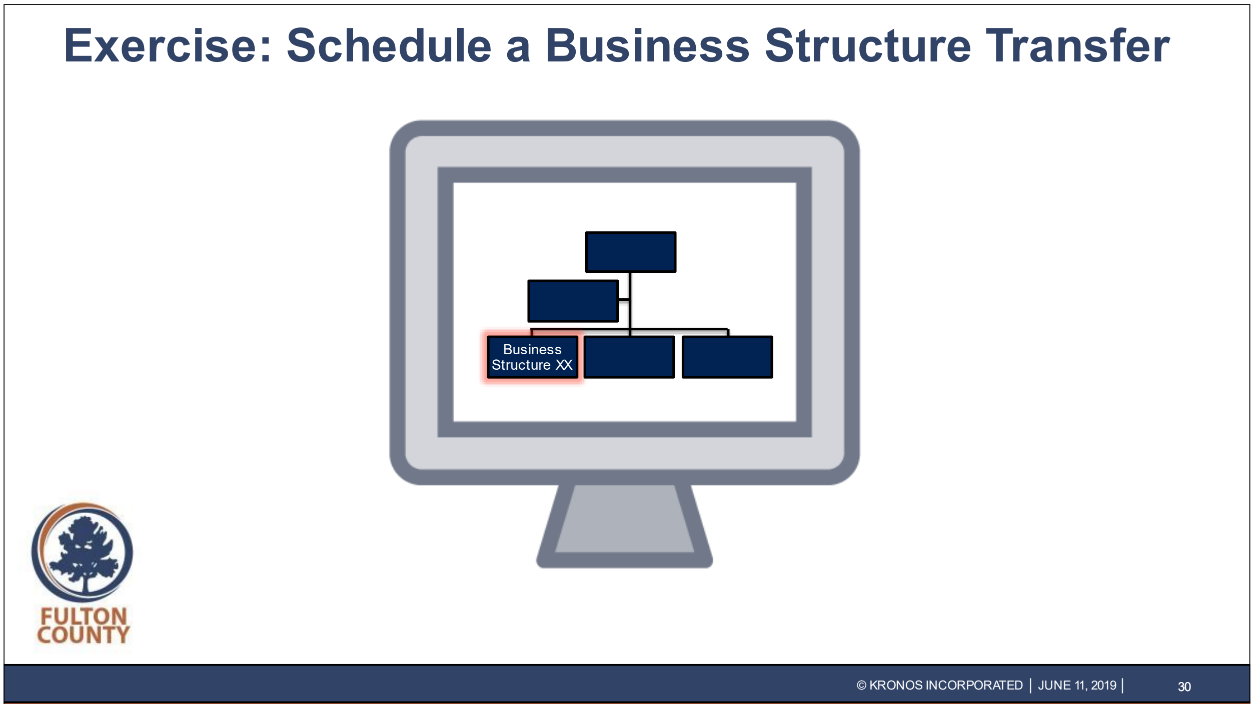
Using the transfer feature, managers can:

- Transfer employee hours to a different part of the business structure.
  - For example, an employee who usually works as a cashier in Store A is cross-trained to work at the distribution center. His time worked can be allocated to the distribution center for accurate reporting and accounting.

Transferring Shifts



You can transfer a shift as you add it, or edit a shift after it has been scheduled to record the transfer information.



Schedule a Business Structure Transfer

An employee works in a different job on Tuesday morning. Michael would like to add a shift to the schedule and apply a transfer to the employee's shift.

1. Double-click **Hourly4 Test's** empty **Tuesday** column to open the **Edit Shift** slider.
2. Click in the **Start Time** field and type **7:30am**. Then press Enter.
3. Click in the **End Time** field and type **3:30pm**. Then press Enter.
4. Click **Transfer Employee**.
5. Select the **Add Business Structure** link.
6. In Locations, click **FULTON COUNTY**.
7. In Locations, select **FULTON COUNTY/102**.
8. In Locations, select **1021**.
9. In Jobs, select **DIRECTOR ADMINISTRATION AND STAFF**.
10. Click **OK**.
11. Click **Apply** to close the Transfer panel.

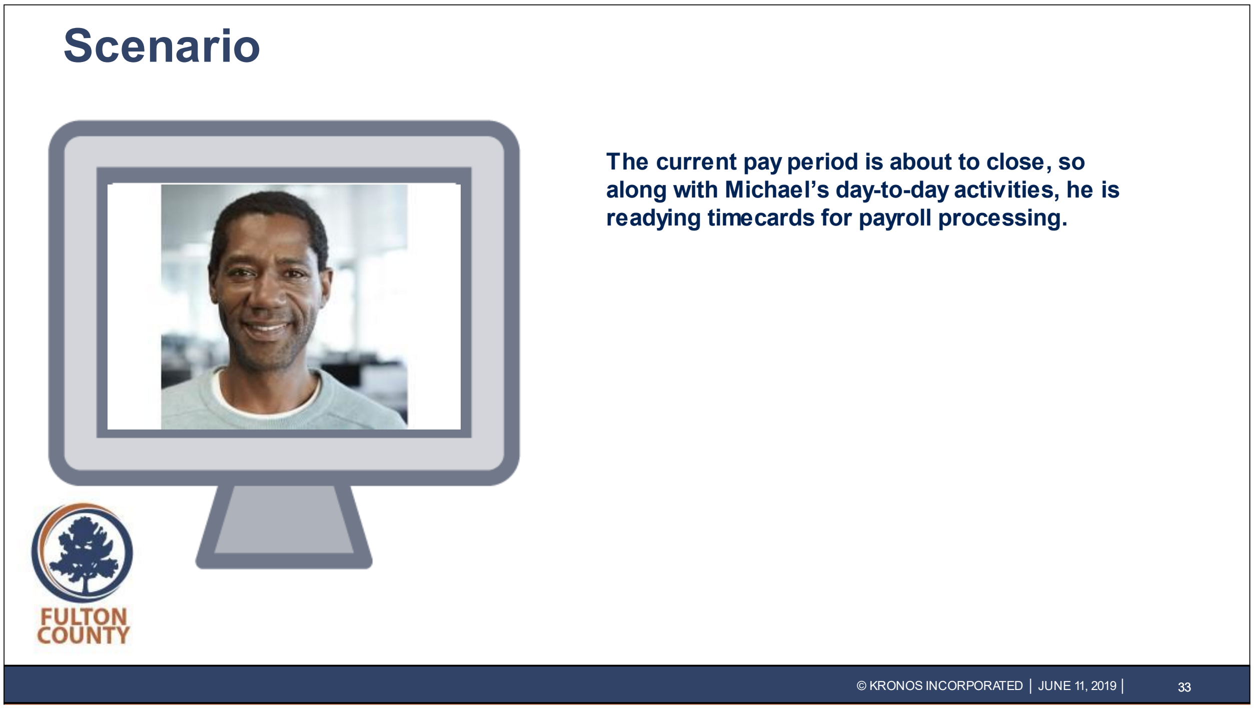
    Notice that the Edit Shift panel shows that Hourly4 Test is now scheduled in ADMINISTRATION AND STAFF for his shift.
12. Click **Apply**.

    Notice the double arrows on Hourly4 Test's shift that indicate a transfer.
13. Click **Save**.

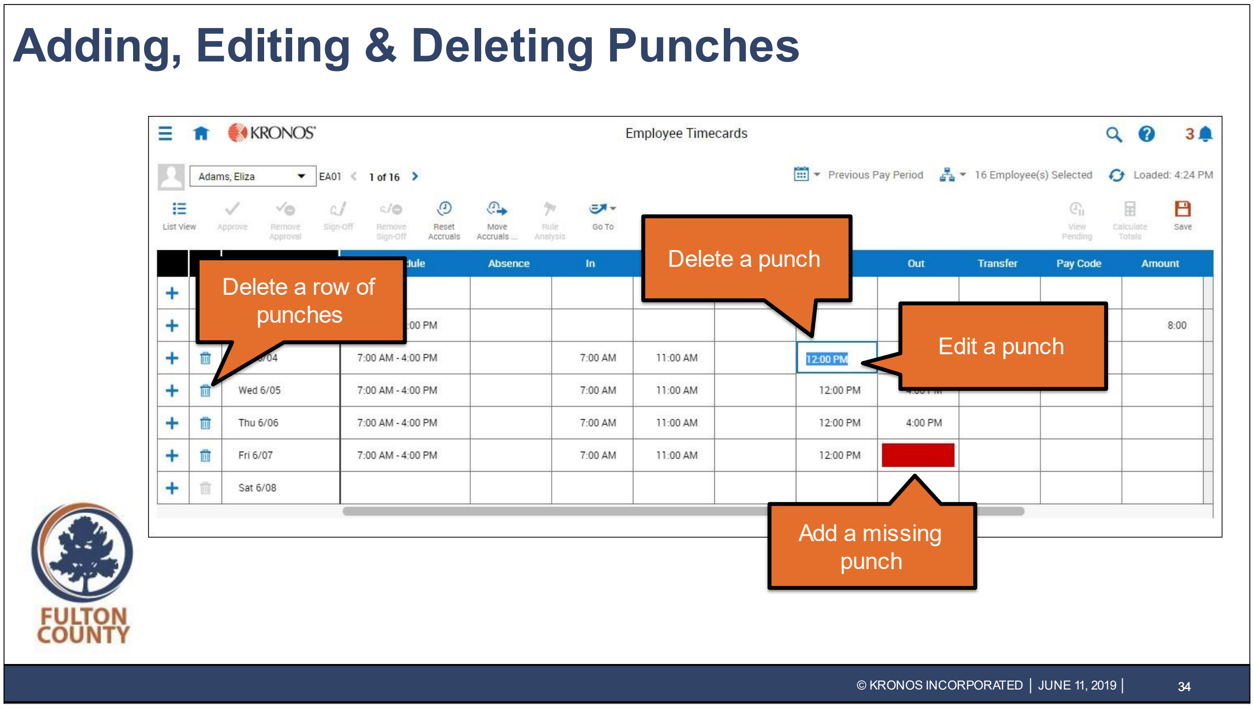
Timekeeping

Timekeeping

In this section, you will be reintroduced to common Timekeeping concepts you learned about in previous training. After that, you will have an opportunity for hands-on practice to see how to apply those concepts.

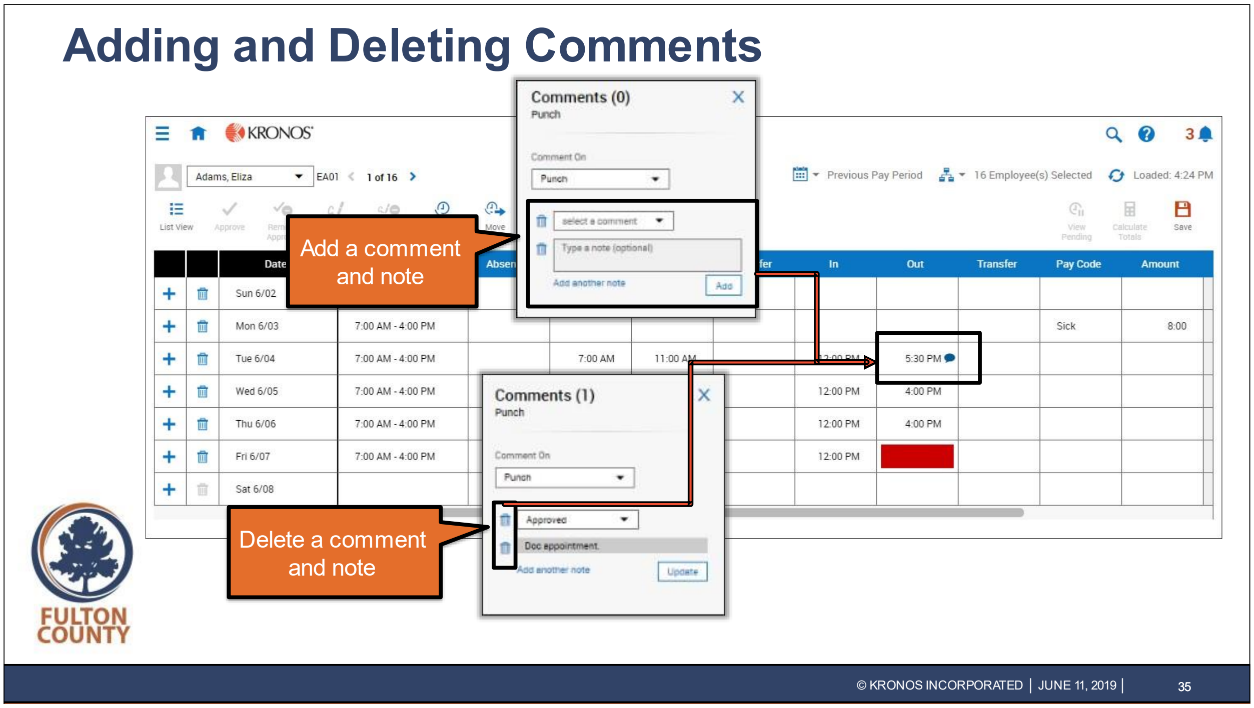


While performing his daily managerial activities, Michael is also working to ready employee timecards for payroll processing.



Michael Martin can:

- Add a missing punch by selecting a cell and entering the applicable time.
    - For example, one of Michael's employees forgets to punch out and calls Michael to ask him to add the missing punch.
- Edit an existing punch by selecting a cell and making the applicable edits. Note that when you edit a punch, a black triangle will appear in the cell to indicate an edit was made.
    - For example, Michael edits an out punch when an employee agrees last minute to return to work for an extra hour.
- Delete a row of data from the timecard by selecting the Delete icon.
    - For example, hours were erroneously scheduled on a day the employee does not work and populated a row on that employee's timecard. Michael can delete that row.
- Delete a single punch by selecting the applicable punch and pressing Delete on your keyboard.
    - For example, an employee punched out by mistake and then returned to work. Michael can delete that out punch.



It is recommended that any time you edit a timecard, you add a comment in the cell that contains the edit for record-keeping purposes. You can also add comments to exceptions and punches, if appropriate. Comments can be edited and deleted.

Add Punches and Comments to an Employee's Timecard

Eliza Adams usually works from 7:00 AM to 4:00 PM Monday-Friday. Over the weekend, she realized that she did not punch out last Friday and let Michael know. Michael will need to access her timecard to address the missing punch.

1. Click the **Main Menu** icon in the top left of the screen to open the Main Menu.
2. Click to expand the **Time** section of the main menu and select **Employee Timecards**.
3. On the **Employee Timecards** page, validate that you are viewing data for the **Previous Pay Period**.
4. Single-click **Eliza Adams's** name.
5. Locate **Friday's** date within the timecard and click the **Out** column with the missing punch (red block).
6. Type **4p** in the cell and then press **Enter**.
7. Click **Save**.
8. Right-click the updated **Friday Out** column and select **Comments**.
9. Click the **Select a Comment** drop-down list and scroll down bar to select **Missed Punch**.
10. Click the **Type a note** section. In this case, the note "Employee forgot to punch" will be entered for you.
11. Click **Apply**.
12. Review your edits. Validate that the Comment icon is displayed in the edited cell.
    Note the black triangle that indicates that the cell has been edited.
13. Click **Save**.

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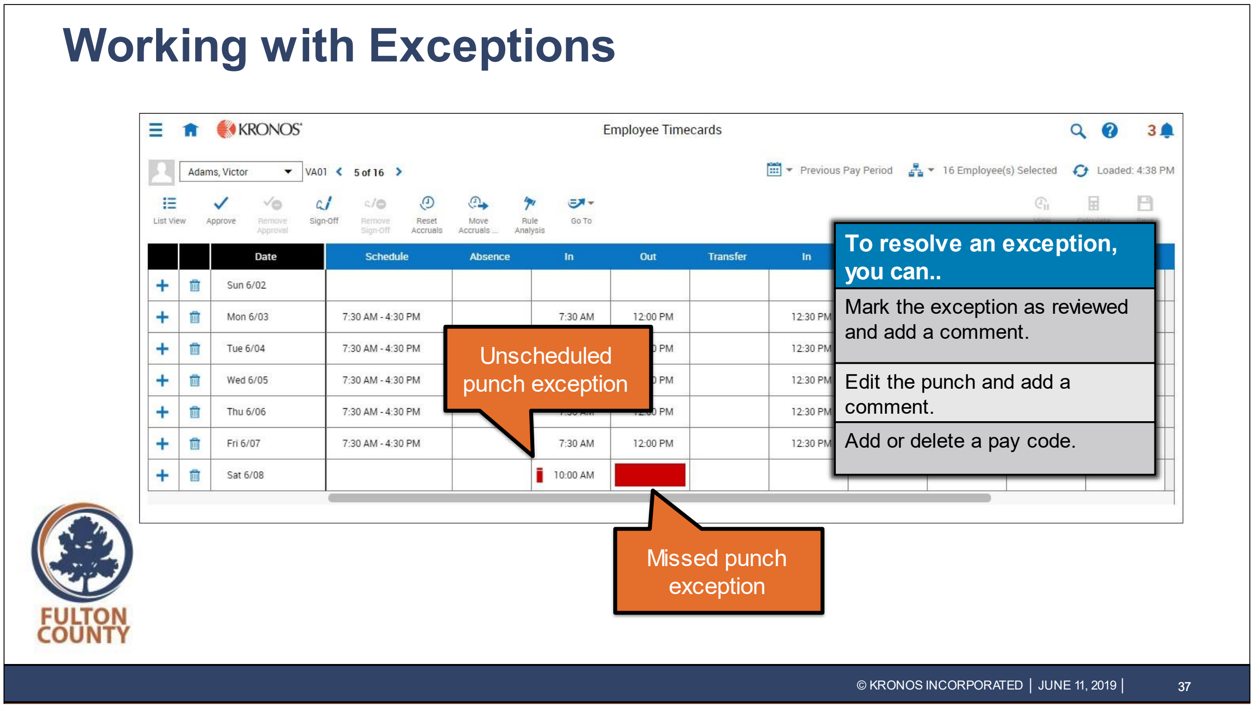
14. Click the **bell icon** to see remaining notifications.
15. Locate the notification for Eliza's missed punch and click **Mark Read**.
16. To review a line item break down of the employee's total hours for the selected time period, click the **Totals** add-on at the bottom of the timecard.
17. The employee's hours are broken down by location/job/dept and by pay code for the selected time period.
    Note: Wages are only display if you have access rights to view wages.
    After reviewing the totals, click the **X** in the top right of the Totals add-on to close the section.



Exceptions are generated in timecards when there is a deviation from the employee’s scheduled hours. For example, if an employee is scheduled to work from 7:00 AM to 5:00 PM, but leaves work at 4:30 PM, an exception may be generated.

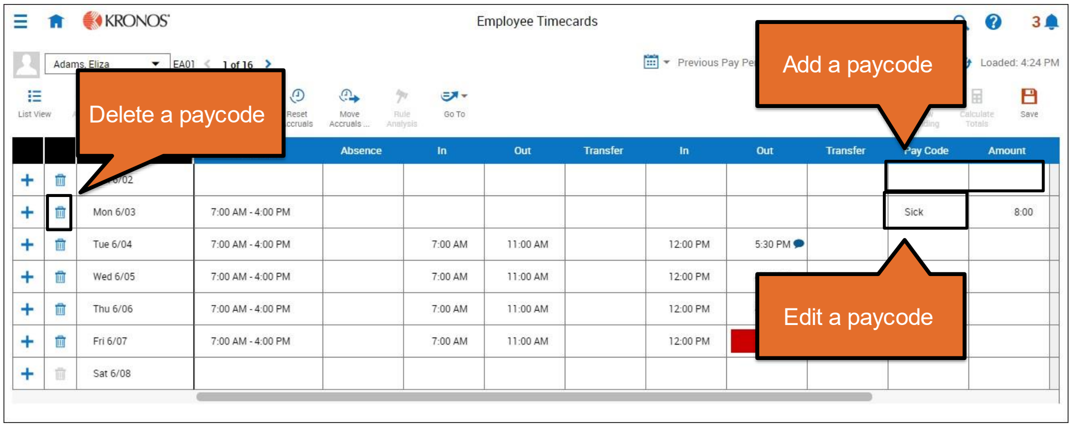
As exceptions appear in employee timecards, a manager may be expected to resolve those exceptions by marking the exceptions as reviewed, editing the punch, or adding or editing a paycode.

Review Exceptions and Add Comments

Michael would like to address the exceptions that were generated by the added transactions in Justin Welch's timecard.

1. In Justin Welch's timecard, hover your cursor over the **In** punch **exception**.
   Notice that an "Unscheduled" exception was generated.
2. Right-click the **In** punch cell with the exception and select **Comments**.
3. Click the **Comment On** drop-down list and select **Punch**.
4. Click the **Select a Comment** drop-down list and select **Approved**.
5. Click the **Type a note** section and type: **Covered part of Greg's shift** and then press **Enter**.
6. Click **Apply**.
7. Right-click the cell again and select **Mark as Reviewed**.
   Notice the exception changes from red to green.
8. Click **Save**.
9. To return to the Home page, click the **Home** icon.

Adding, Editing and Deleting Paycodes



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Using paycodes, Michael Martin can:

- Add a paycode to establish a different pay type for worked or non-worked hours. (Note: Paycodes cannot be added to a row with punches. If both are needed on the same day, add a row for that day to enter the paycode information.)
  - For example, a Sick paycode indicates that the employee was sick during their shift and was unable to work for the defined amount of hours.
- Edit an existing paycode by selecting and updating the existing paycode using the Paycode drop-down list.
- Delete a row with a paycode by selecting the Delete icon.

Exercise: Add a Paycode to Excuse an Absence

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Add a Pay Code to Excuse an Absence

Greg Adams is scheduled to work 7:00 AM to 4:00 PM on Monday. Greg called Michael to let him know he is ill and Michael will need to add the Sick pay code to Greg's timecard.

1. In Eliza's timecard, click **1 Employee(s) Selected** in the top right corner and select **All Home**.
2. Click the **Timeframe** drop-down in the top right corner and select **Current Pay Period**.
3. Click the **Name** drop-down list in the top left corner and select **Adams, Greg**.

   Notice the Unexcused Absence indicator in the Absence column for Monday.
4. Click the **Accruals** add-on at the bottom of the page to review Greg's Sick accrual balance.

   The employee's available accrual balances display for the selected time period.
5. To close the **Accruals** add-on, click the close (X) button in the upper right of the **Accruals** pane.
6. Click the **Pay Code** column on the **Monday** row, and from the drop-down list, select **Sick**.
7. Click the **Amount** column.

   If available, you can select a pre-defined duration such as the full scheduled date or half scheduled day. You can enter your own amount of hours.
8. Type **8** in the cell, then press **Enter**.
9. Right-click the **Amount** column and select **Comments**.
10. Click the **Select a Comment** drop-down list and then click the vertical scroll bar to find and select **Sick with doctor's note**.

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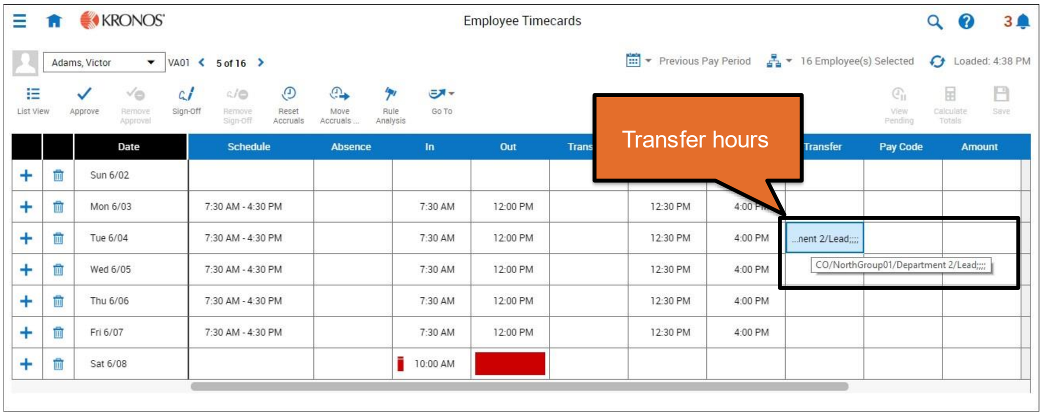
11. Click the **Type a note** section and type: **Called manager at 6am**. Then press **Enter** to continue.
12. Click **Apply**.
13. Review your edits. Validate that the Comment icon is displayed in the edited cell. Click **Save**.

    Notice the Absence column for Monday now displays an Excused Absence indicator.
14. Click the **Totals** add-on at the bottom of the page to review Greg's updated totals.

    Note: Wages are only display if you have access rights to view wages.
15. After reviewing the totals, click the **X** in the top right of the Totals add-on to close the section.

Performing Transfers



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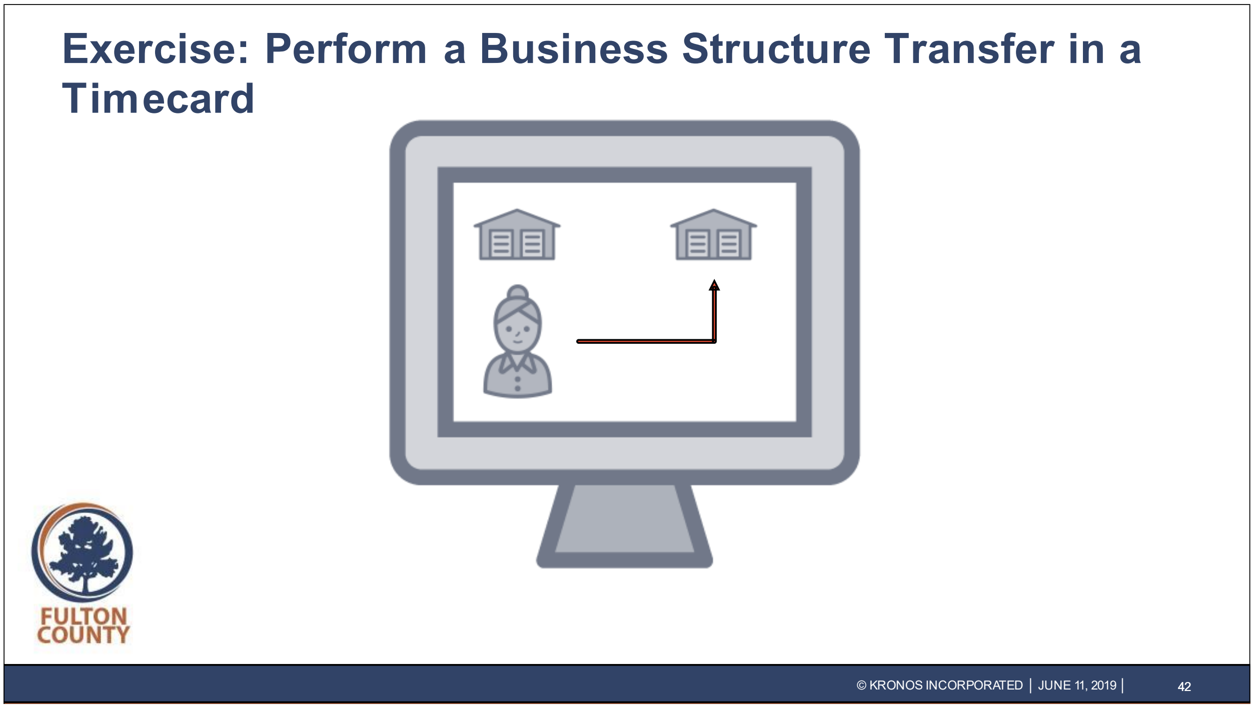
As you learned earlier, managers can transfer employee hours to a different parts of the business structure.

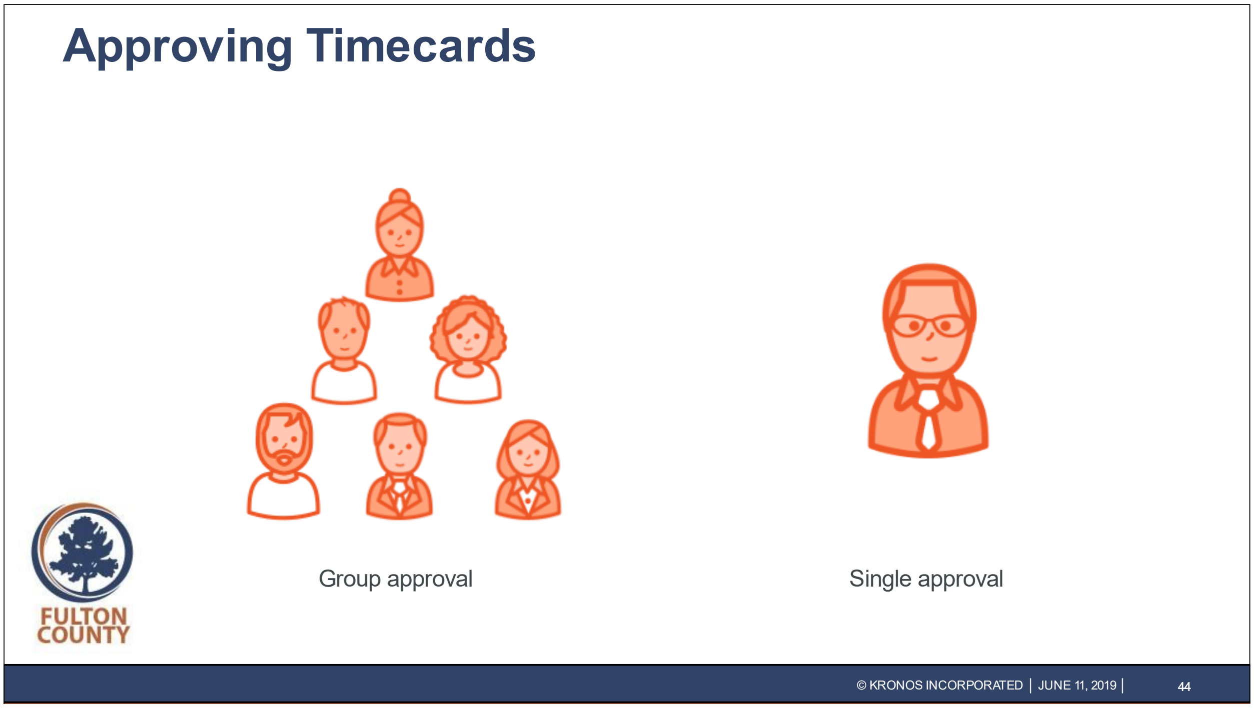


Perform a Business Structure Transfer in the Timecard

An employee is working in a different department for part of her shift. Michael will perform a Business Structure transfer so that the time will be allocated to the appropriate department.

1. On the row for **Monday**, click the **In punch** and type **11:30am**. Press Enter to continue.
2. Click the **Transfer** cell.
3. Click **Search**.
4. Click **Transfer Employee**.
5. In the Transfer dialog box, click the **Add Business Structure** link.
6. In Locations, click **FULTON COUNTY**.
7. In Locations, select **FULTON COUNTY/102**.
8. In Locations, select **1021**.
9. In Jobs, select **ADMINISTRATION AND STAFF**.
10. Click **OK**.
11. Click **Apply** to close the Transfer panel.
12. Click **Save**.

    Notice the transfer from 11:30am to 3:30pm displays in the employee's timecard.
13. Click to Continue.



When approving timecards, managers can approve timecards for groups of employees, or approve one timecard.

Exercise: Approve Employee Timecards (Group)

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Approve Employee Timecards (Group)

Michael has finished his work on the timecards for the previous pay period and would like to approve all of his employees' timecards as a group approval from a Dataview.

1. Click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Click to expand the **Time** section of the main menu and select **Employee Timecards**.
3. Verify that you are reviewing timecard data for the **Previous Pay Period**.
4. Click the **Select All** icon in the top left of the Dataview.

   Note that if more than 40 employees were displayed, you would have to scroll through the page to select them all.
5. Click the **Approve** icon in the top left of the Dataview.
6. In the **Approve Timecard** window, click **Yes**.
7. You can navigate to one of the employee's timecard to see the color change that indicates approval. Click **Eliza Adams'** name.

   Note that the employee's timecard has changed color to indicate that it has been approved.

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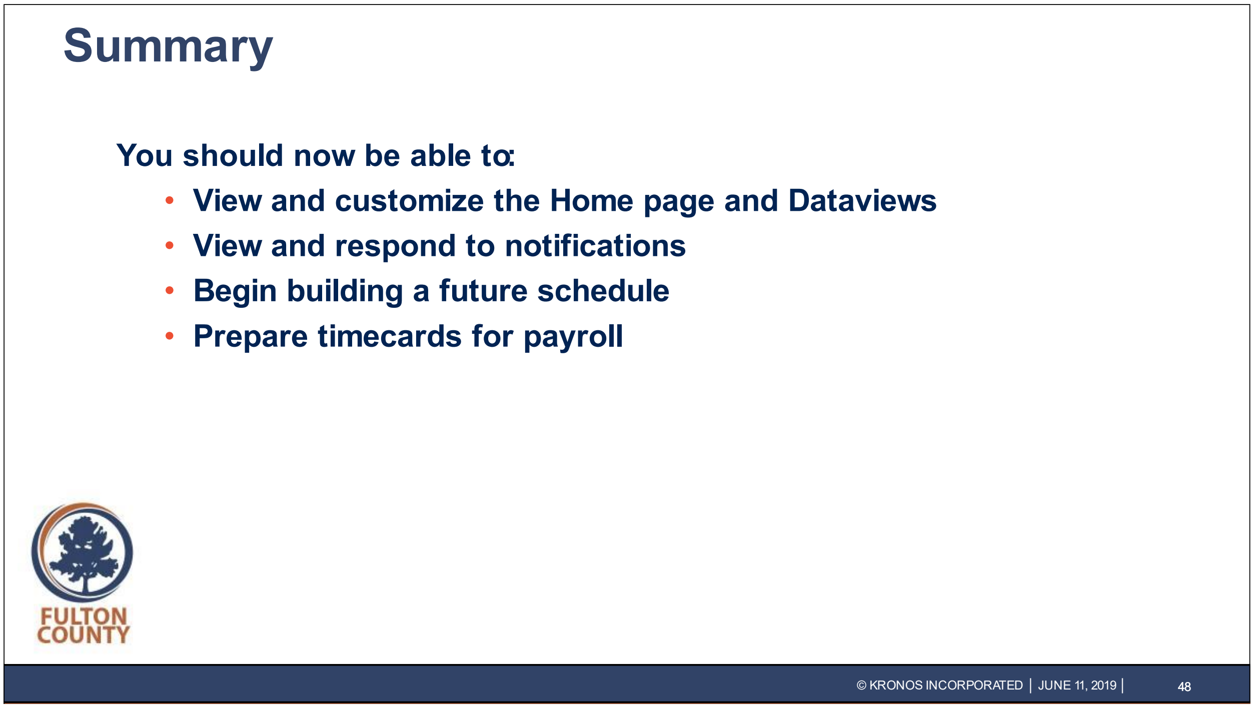
8. To verify that the approval process has been completed for the all timecards and that all approvals were successful, use **Group Edit Results**. To access **Group Edit Results**, click the **Main Menu**.
9. Click to expand the **Dataviews & Reports** section of the main menu and select **Group Edit Results**.
10. Group edits are listed by their status in the **Grouped By** column. Click the Group Edit Status **Completed** to review the results.

    Your **Approved** group edit action is listed with a count of failed, successful, and total records approved.
11. Michael has completed his work and wishes to exit Workforce Dimensions. Click the **Main Menu** and select **Sign Out**.

Approving an Individual Timecard

1. Click the **Main Menu** icon in the top left of the screen to open the main menu.
2. Click to expand the **Time** section of the main menu and select **Employee Timecards**.
3. On the **Employee Timecards** page, validate that you are reviewing data for the **Previous Pay Period**. Click **Eliza Adams's** name.
4. To review a line item break down of the employee's total hours, for the selected time period before approving, click the **Totals** add-on at the bottom of the timecard.
5. The employee's hours are broken down by location/job and by pay code for the selected time period.
   Note: **Wages** only display if you have access rights to view wages.
   To close the **Totals** add-on, click the close (X) button in the upper right of the **Totals** pane.
6. Select **Approve**.
7. An approve message displays, and the color of the timecard changes to indicate that it has been approved by a manager.
   Note: If you need to remove the approval, for example because the timeframe is incorrect, use the **Remove Approval** option.
8. Click the **Home** icon to return to the Home page.

Summary



You should now be able to:

- View and customize the Home page and Dataviews
- View and respond to notifications
- Begin building a future schedule
- Prepare timecards for payroll

Thank you for attending!