



# **Workforce Timekeeper™ v8.0**

*Managing Timecards and Schedules*

## Task Guide

Revision A  
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Version 8.0

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 Managing Timecards and Schedules  
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## Using the Workforce Timekeeper Interface

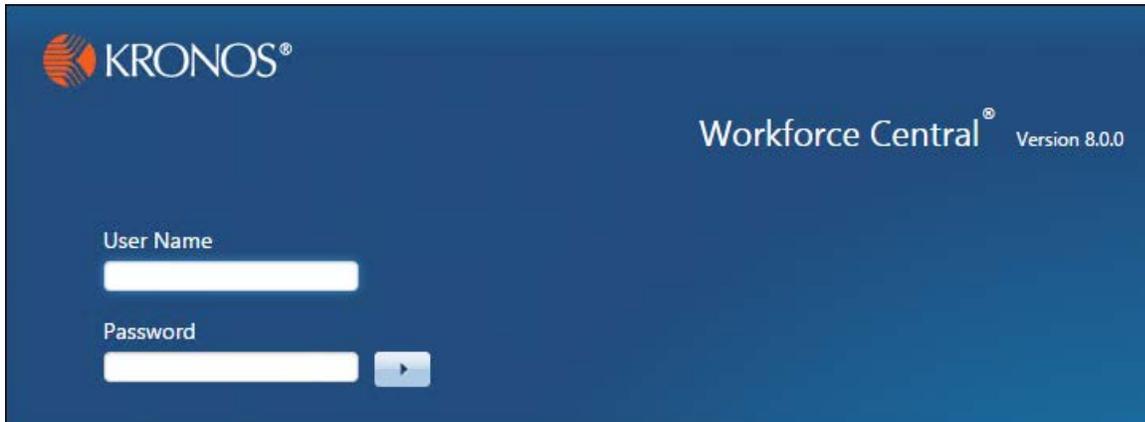
## Basic Navigation

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### Logging On

The Workforce Central logon page provides access to all features in the Workforce Timekeeper application to which you have been given access.

To access Workforce Timekeeper, enter your organization's unique Workforce Central Uniform Resource Locator (URL) in a standard browser. Then enter a user name and password on the logon page.



### Note

Check with your Workforce Timekeeper application administrator for your organization's specific Workforce Central URL.

Password requirements, such as required characters and case-sensitivity, vary according to organizational needs. Check with your Workforce Timekeeper Application Administrator for your Workforce Central user name and password, and to identify your application's password requirements.

### Logging on to Workforce Timekeeper

1. Access the **Navigator** log on page.
2. Enter your **user name** and **password** in their designated fields.
3. Click the right-facing arrow or press the **Enter** key on the keyboard.

Your navigator appears.

## Signing Out

### Signing Out of Workforce Timekeeper

Signing Out of Workforce Timekeeper:

- Closes your session
- Signals to the application that you no longer require access to any of its components
- Prevents other people from accessing your information

To log off Workforce Timekeeper, click the **Sign Out** link.



### Recommended Practice

Kronos recommends that you always end your work session by clicking the Sign Out link, located in the top-left corner.

Clicking Close (x) without first logging off might leave your connection to the application open, allowing unauthorized people to view and edit information.



### Tip

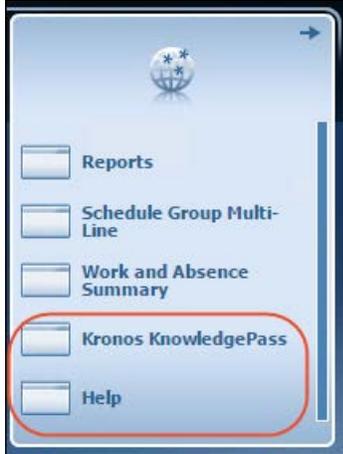
Save the Workforce Central URL as a “favorite” in your web browser for quick access.

## Accessing Support in the Application

Workforce Central offers the following support resources:

- KnowledgePass
- Online Help

If you have access to KnowledgePass and Online Help, you can access these links in the Related Items pane.



## Using KnowledgePass

KnowledgePass provides just-in-time training—or refresher training—for tasks specific to your job role. KnowledgePass content covers a range of topics and tasks and includes tutorials, job aids, and practice simulations. It is available to organizations that subscribe to KnowledgePass.

If configured, KnowledgePass opens in a new tab and brings you to your My Learning page. This page provides access to all of the courses that have been assigned to you in the My Learning block.

## Using Online Help:

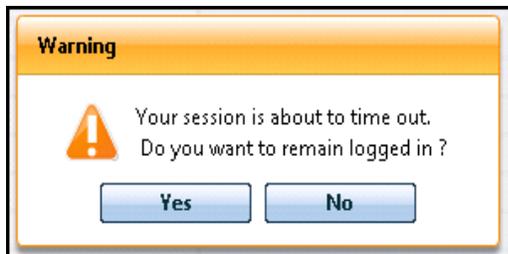
Online Help is your tool for on-the-job support.

- Use the **Contents** tab to scan through the table of contents for the applications(s) in the suite that you are using.
- Use the **Search** tab to search for a specific topic of interest.
- If desired, click **Maximize** to gain more space on the screen. Click **Restore Down** to return the widget to its original size.

## Using the Inactivity Timeout

The inactivity timeout screen appears if there is no user activity, such as saving or searching, for a set length of time.

When the timeout warning appears, click **Yes** to continue. If you are finished with your session, click **No**.



### Note

Your organization's application administrator can configure the inactivity timeout by adjusting the Session Timeout parameter.

### Recommended Practice

Be sure to click **Yes** if you want to remain logged in.

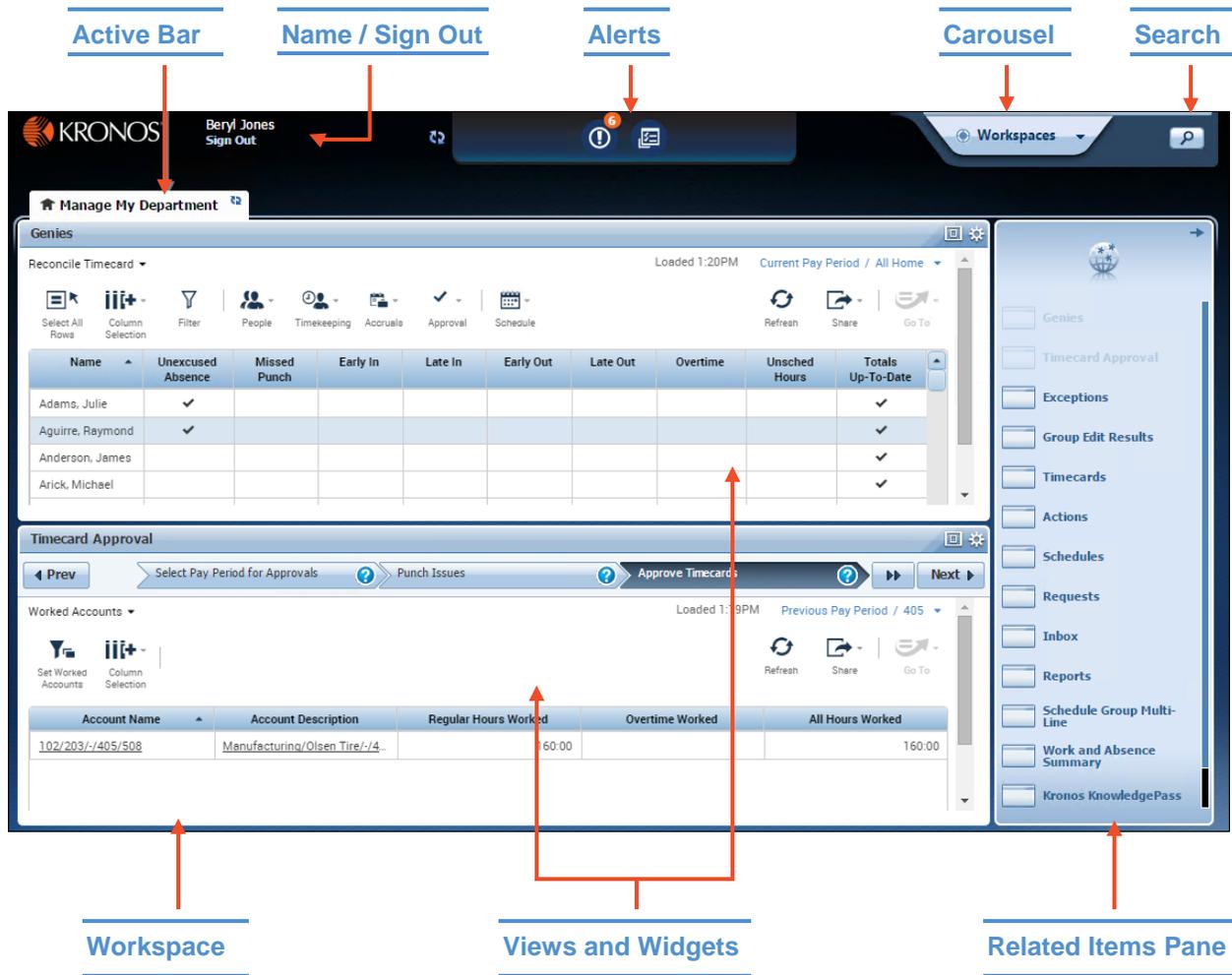
If you do not click **Yes** after receiving the inactivity timeout message, you will be logged out of the application and will lose all unsaved edits.

## Using Your Navigator

After you log on to the application, your Navigator appears. Navigators are customized views of the information that is important to completing daily work tasks in the application. All navigators include a home workspace that is displayed when you first log on. Workforce Central includes Navigator templates that are assigned based on user licenses. There are templates for employees, managers, managers who are also employees, and administrators. The templates can be used as is, or copied and modified as necessary.

## Parts of a Navigator

Navigators have many different parts. Each part of a navigator either provides you with information or helps you to perform a task.



Screen Area	Description
Active Bar	A horizontal area at the top of the navigator that displays the currently opened workspaces as tabs. Click a tab to bring a workspace into focus. Click the Refresh icon next to the title to reload the workspace with its default information.
Name/Sign Out	Identifies the user and provides a link to log out of navigator. Your photo may also appear here.

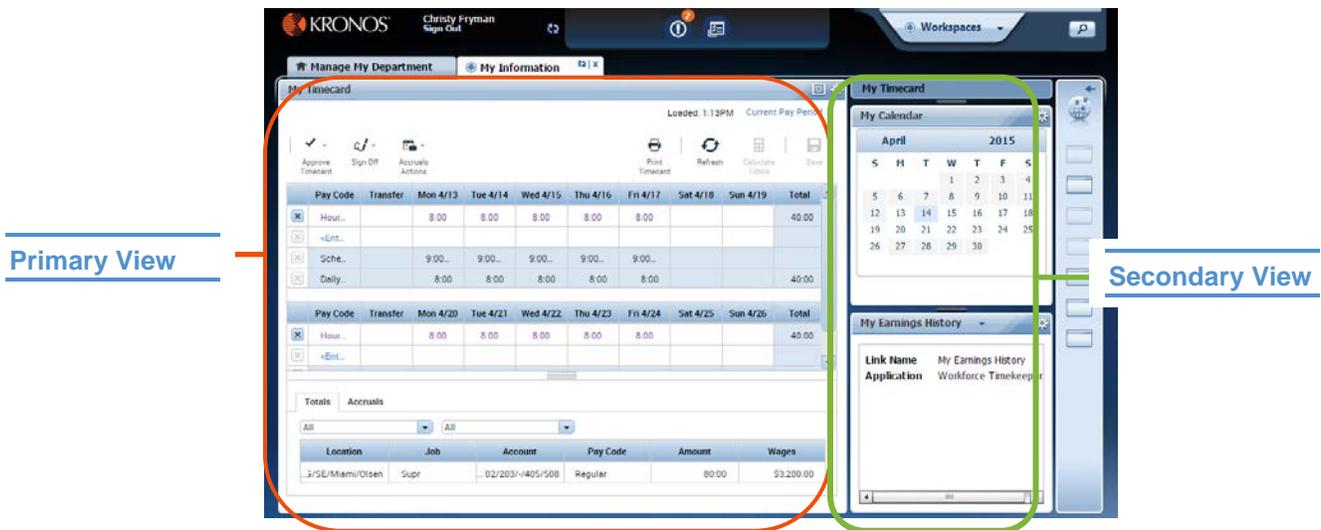
Screen Area	Description
Alerts	Links, which appear as icons, enabling you to quickly view the type and number of tasks and issues that require your immediate attention. (Note: Alerts are optional)
Carousel	Container for one or more workspaces (Note: Carousel appears only if you have been assigned another workspace in addition to your home workspace.)
Search	Click to open the Search widget, to locate employees and their information.
Workspaces	A work area made up of one or more views and the Related Items pane.
Views and Widgets	A workspace can have one or more pre-sized views. Views are holding areas for widgets, which are the task-oriented tools you use to review data and perform actions. In this example, there are two views, and each one currently holds a widget. When you need to work with a different widget, you can swap it into either view, replacing the current occupant.
Related Items Pane	Includes one or more additional widgets that are part of the workspace; the Related Items pane contains different widgets for each workspace.

## Managing the Active Workspace

You can change your view of the information in the workspace or associated widgets.

### Primary and Secondary Widgets

All workspaces have at least one primary view, and some also have one or more secondary views. Normally, to work in a widget you must move it into a primary view. Widgets occupying secondary views often provide useful information, but are not fully functional until moved into a primary view.



### Multiple Primary Views

Some workspaces feature two equally-sized views in a side-by-side or top-and-bottom layout. In this case, both views act as primary views, and widgets in those views are fully functional.

### Repositioning Widgets

Move a secondary widget into a primary position by clicking the title bar, dragging it over the primary widget, and releasing.

### Hovering for Details

Hover the mouse to see a tool tip containing details, where applicable.

### Contextual Callouts

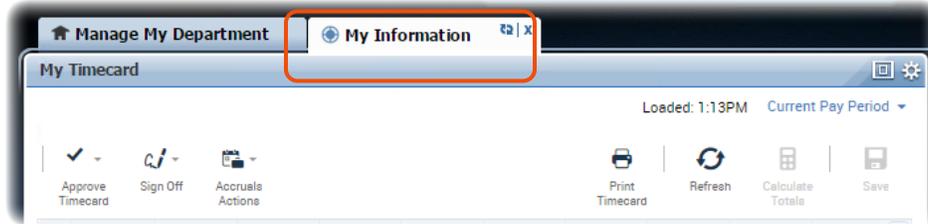
Right-click a cell within a widget; in many cases, this opens a callout with detailed information and icons for any actions you are allowed to perform on that cell.

### Using the GoTo Control

Depending on how your navigator is configured, you may be able to perform further actions on the entries in a widget. If your navigator has a GoTo control configured, you may be able to select one or more employees, click the GoTo control, and then access the employees' timecards, the Schedule Planner, or another Workforce Central page where you can perform an action.

### Workspace Tabs

Each active workspace gets its own tab. You can switch back and forth between workspaces by selecting the tab you want to view. You must always have at least one workspace open, but you can close any additional workspaces by hovering over its tab and clicking the Close (X) button.



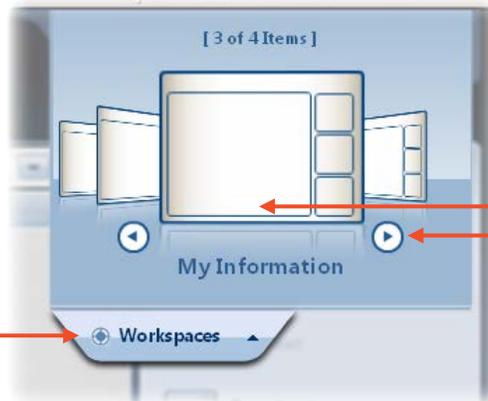
## Opening Workspaces and Widgets

Opening different workspaces provides access to different sets of widgets.

### Opening Workspaces

If you have been assigned more than one workspace, you can:

- Access all available workspaces by clicking the carousel.
- Use the arrows to toggle between available workspaces.
- Click a workspace to make it active.
- Click the X in the workspace tab to close the workspace (other than your default workspace).



### Closing the Carousel

Click the Workspaces tab to close the carousel

### Additional Workspaces

Click an item in the carousel to open an additional workspace. To close that workspace later, hover over its tab and click the Close (X) button.

### Cycling the Carousel

If there is more than one workspace in the carousel, use the arrows to cycle through the additional workspaces

### Opening Widgets

Within any workspace, you can access widgets and activate them by bringing them into your active workspace. To open a widget:

- From the Related Items pane, select a widget OR click a widget and drag it into your active workspace.
- To remove the widget, click the gear icon and click Close.

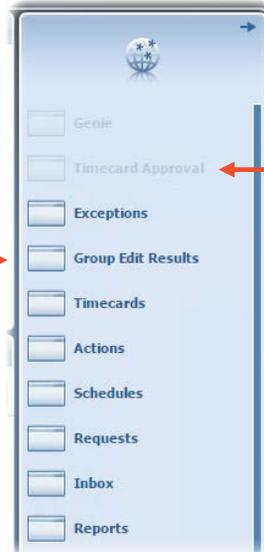
## Activating a Widget

There are two ways to activate a widget in the Related Items pane

To add it to the current workspace, drag it out of the pane and release it over a widget in the workspace.

To work with the widget in a temporary workspace, click the widget while it is still in the pane.

To close that workspace later, hover over its tab and click the Close (X) button.



## Closing the Related Items Pane

Click the right arrow to close the Related Items pane. When closed, click the left arrow to open it.

## Active Widgets

Widgets already in an open workspace appear grayed out in widget list.

## Widget View Options

There are several ways to adjust the view or preferences of a widget to better suit your needs while you work through tasks.

### Gear Icon

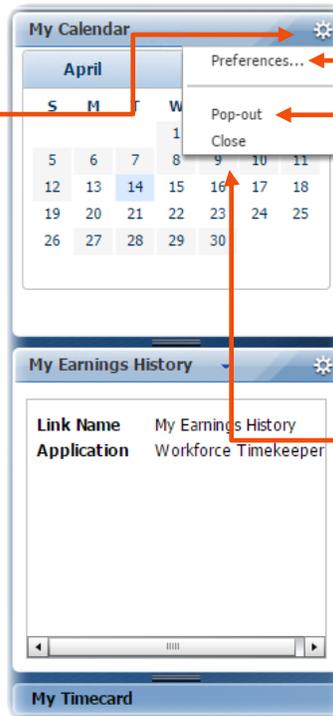
Click to view options for moving the widget. Unavailable options will be grayed out. (For example, widgets in the primary view cannot use Close or Pop-out.)

### Resize Bar

Click and drag the resize bar to reveal more of a particular secondary view.

### Title Bar

Click and drag a widget's title bar to swap it with another widget or return it to the Related Items pane.



### Preferences Option

Select Preferences to edit settings for a widget, such as time period, and permanently save the changes. Preferences, if enabled, are saved only for your use in your own widget.

### Pop-out Option

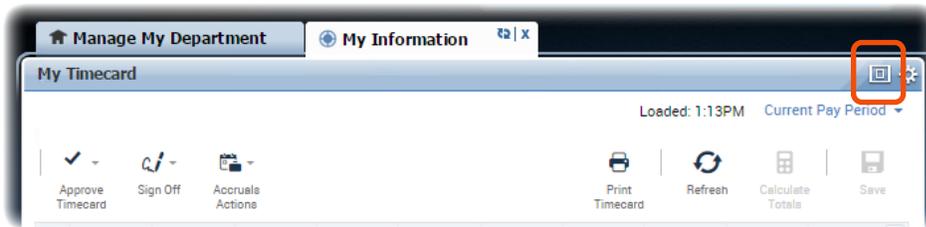
Select Pop-out to promote a secondary widget to a primary position.

### Close Option

Select Close to send a widget in a secondary view back to Related Items.

## Maximize/Restore Icons

Click to expand a widget in a primary view to its maximum size. (This will temporarily hide any other widgets.) Click again when maximized to restore to the original size.



## Using the Search Widget

Employee search allows you to quickly locate information about employees, locations, and jobs in Workforce Central. In addition, Employee Search evaluates your search text and offers suggestions that are possible matches for the information you are searching. When you find the employee or other information you are seeking, you can frequently drill down to a deeper level of information.

If a Search widget has been configured for you, it will appear in the upper-right corner of the navigator.

Enter part of an employee's name and Search offers potential results that fit your criteria. For example, when you enter "jo", your search returns:

- A list called **People**. These are the employees who have those letters at the beginning of either their first or last name.
- A list called **Who have**. This category contains a list of people who have an assigned manager with the search letters in either their first or last name.
- A list called **Were you looking for**. This category contains possible items you may have been looking for that contain the letters entered in search.

## Performing Actions on the Items in the Results Pane

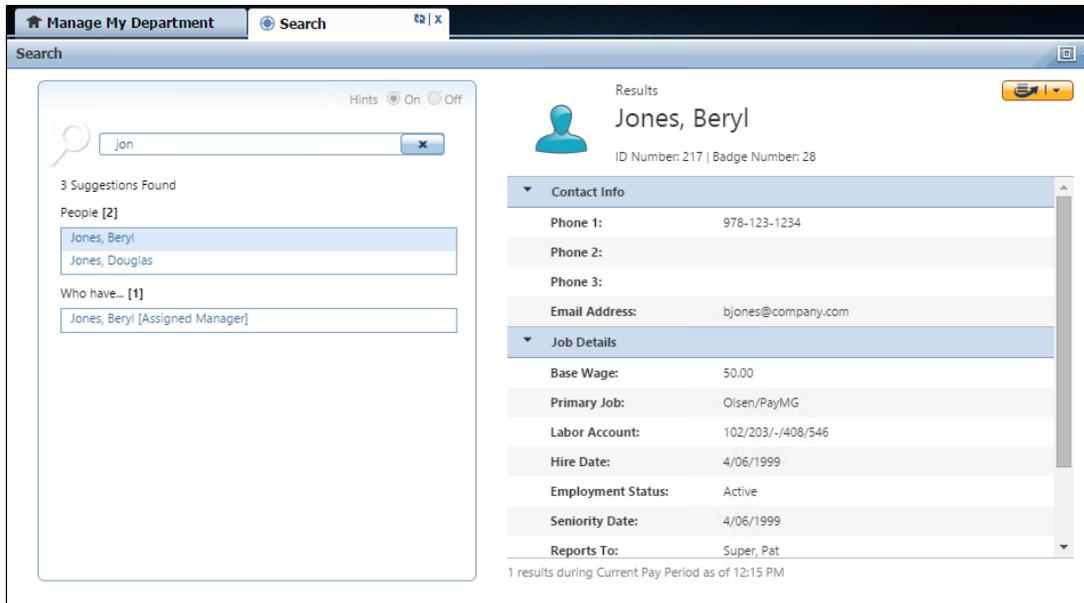
Depending on how your navigator is configured, you may have several options for performing further actions on the entries in the Results pane. If your navigator has a GoTo control configured, you may be able to select one or more employees, click the GoTo control, and then access the employees' timecards, the Schedule Planner, or another location where you can perform an action.

## Hints

The Hints feature displays a drop-down list that contains categories that employees are assigned to. For example, to obtain a list of employees who have unexcused absences in the current pay period, from the drop-down list select **Absence Unexcused > True**. Then review the data in the Results pane.

## Searching for an Employee Using Search

1. Click the **Search** icon.
2. Select an option to turn the Hints feature on or off.
3. In the **Search** field, enter at least the first three letters of the employee's first or last name. For example, **jon**.
4. Click an entry to display more information in the **Results** pane. The information shown for the employee includes the employee name, badge number, contact information, job details, pay rules, and profiles assigned to that employee.
5. While viewing an employee's information in the **Results** pane, you can select GoTo Control to move to a different Workforce Central location.



The screenshot shows a web application interface for 'Manage My Department' with a search bar. The search bar contains the text 'jon'. Below the search bar, there are three suggestions: 'Jones, Beryl', 'Jones, Douglas', and 'Jones, Beryl [Assigned Manager]'. To the right of the search bar, there is a 'Hints' toggle set to 'On'. The search results for 'Jones, Beryl' are displayed on the right side of the screen. The results include a profile picture, the name 'Jones, Beryl', and the ID Number '217' and Badge Number '28'. Below this, there are two sections: 'Contact Info' and 'Job Details'. The 'Contact Info' section lists 'Phone 1: 978-123-1234', 'Phone 2:', 'Phone 3:', and 'Email Address: bjones@company.com'. The 'Job Details' section lists 'Base Wage: 50.00', 'Primary Job: Olsen/PayMG', 'Labor Account: 102/203/-/408/546', 'Hire Date: 4/06/1999', 'Employment Status: Active', 'Seniority Date: 4/06/1999', and 'Reports To: Super, Pat'. At the bottom of the results, it says '1 results during Current Pay Period as of 12:15 PM'.



## KnowledgePass

For additional information on Navigating Workforce Central, access KnowledgePass and view the following job aids:

- Manager Navigator Job Aid
- Employee Navigator Job Aid

## Time Data Basics

### Viewing Exceptions and Comments

#### Reviewing Exceptions in the Exceptions Widget

The Exceptions widget is a specialized widget that displays exception data for hourly employees, or employees who punch in and out to track their worked time. There are two views in the widget:

- Summary
- Details

#### Exceptions Summary View

Each column is an exception; a number in the column identifies an exception for the employee. The columns can be configured to meet the needs of your organization. This is a view-only mode. No tasks can be performed in this view.

Time Data Exceptions					
Name	Early In/Out	Late In/Out ▲	Missed Punch	Unexcused Absence	Total
Jacobs, Joseph					0
Stock, Donna					0
Tesch, Kim					0
Hoyle, Liam					0
Torres, Katherine					0
Boyd, Mary J					0
Ryan, Kayla					0
Rogers, Jack	1			1	2
Carpenter, Jill			2		2
Crowsoft, Michael					0
Smith, Jack C			2		2
Smith, John D					0
Brooks, Bob					0
Fallon, Jane					0
Geldres, Elise					0
Evans, Edna					0
George, Pat					0
Warden, Melvin					0
Lussier, Rob	1				1
<b>Total:</b>	<b>3</b>	<b>3</b>	<b>4</b>	<b>12</b>	<b>22</b>

#### Details View

Accessed from the Summary view, the Details view provides access to In and Out punches, schedule data, and more details about the exceptions. In this view, you can also resolve exceptions and enter comments.

#### Visual Indicators in the Details View

The Details view provides several visual indicators to help you quickly interpret the data on the screen.

Exception Type	Details View Visual Indicator
Unexcused Absence	Date displayed in red text

Exception Type	Details View Visual Indicator
Early In/Out or Late In/Out	In or Out time text displayed in red text
Missed punch	In or Out time cell filled with solid red
Reviewed exception	In or Out time text displays in green

When a comment is added to a punch in Details view of the Exceptions widget, a blue message balloon icon appears to the right of the punch.

## Reviewing Exceptions in Hourly and Project Timecards

In Workforce Timekeeper, managers can access employee timecards in a central location, using the Manager Timecard widget. Managers can review and address exceptions in both hourly and project timecards from the widget.

### Hourly Timecard View

The hourly timecard is another tool for managing employee time data for hourly employees, or employees who punch in and out to track worked time. Similar to the Details view of the exceptions widget, there are visual indicators that identify time data discrepancies. There is also a visual indicator for a comment that has been attached to a punch.

Exceptions can also be resolved in this tool, and comments can be added here as well.

### Project Timecard View

The project timecard is a tool for managing employee time data for project or salaried employees: employees who track their in durations, and do not punch in and out. The visual indicators in this view are similar to those in an hourly timecard. Exceptions can also be resolved in this tool, and comments can be added here as well.

### Visual Indicators in Hourly and Project Timecards

The timecard views provide several visual indicators to help you quickly interpret the data on the screen.

Exception Type	Hourly View Visual Indicator	Project View Visual Indicator
Unexcused Absence	Red icon with white line near top in Date cell	Same
Excused Absence	Blue icon with three white lines in date cell	Same
Early In/Out or Late In/Out	Red icon with white line near top in the impacted punch cell	NA
Missed punch	In or Out time cell filled with solid red	NA
Reviewed exception	Green icon with three white lines in the impacted punch cell	NA

When a comment is added in a timecard, a blue comment bubble appears to the right of the punch.



#### Tip

To learn more about visual indicators in the different time data views, review the following topics in Online Help:

- From Contents, access: **Timekeeping > Timecard > Icons in the timecard** and **Colors in the timecard**
- From Contents, access: **Timekeeping > Exceptions widget**

The following illustration shows a manager's view of an hourly timecard with several time data exceptions and a comments indicator.

Timecards

Adams, Julie 1 of 1

Loaded: 11:09AM Current Pay Period/1 Employee(s) Selected

Approve Timecard Sign Off Accruals Actions Print Timecard Refresh Calculate Totals Save Go To

	Date	Schedule	In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
+ x	Mon 5/04	9:00AM-2...	9:00AM	3:00PM				5:00	5:00	5:00
+ x	Tue 5/05	9:00AM-2...								
+ x			9:00AM			Sick	4:00		4:00	9:00
+ x	Wed 5/06	9:00AM-2...	9:00AM	2:00PM				4:00	4:00	13:00
+ x	Thu 5/07	9:00AM-2...	9:00AM							13:00
+ x	Fri 5/08	9:00AM-2...								13:00
+ x	Sat 5/09									13:00
+ x	Sun 5/10									13:00

The following illustration shows a manager's view of a project timecard with time data exceptions.

Timecards

Anderson, James 30 of 44

Loaded: 11:13AM Current Pay Period/All Home

Approve Timecard Sign Off Accruals Actions Print Timecard Refresh Calculate Totals Save Go To

	Pay Code	Transfer	Mon 4/27	Tue 4/28	Wed 4/29	Thu 4/30	Fri 5/01	Sat 5/02	Sun 5/03	Total
x	Hours Work...		8:00		8:00	8:00				24.0
x	Hours Work...			4:00						4.0
x	Vacation						8:00			8.0
x	<Enter Pay ...									
x	Schedule		9:00AM-5:0...	9:00AM-5:0...	9:00AM-5:0...	9:00AM-5:0...	9:00AM-5:0...			
x	Daily Total		8:00	4:00	8:00	8:00	8:00			36.0
	Pay Code	Transfer	Mon 5/04	Tue 5/05	Wed 5/06	Thu 5/07	Fri 5/08	Sat 5/09	Sun 5/10	Total
x	Hours Work...			8:00	8:00	8:00	8:00			32.0
x	<Enter Pay ...									

## Accessing Employee Data Using Workforce Genies

### Using Workforce Genies

Genies are highly customizable for users to ensure that they see only the data that is applicable to their business needs. Depending on your navigator configuration, you can select available Genies from either the Related Items pane or the Genies widget.

#### The Genies Widget

The Genies widget provides convenient access to Genies within your workspace. If configured, all of the widgets that you have access to can be found in the Genies widget.

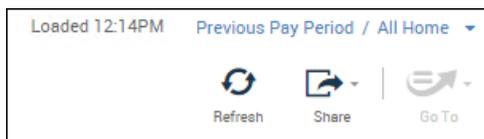
#### Sorting, Grouping, and Refreshing Data in a Genie

You can access the most up to date data within a Genie by clicking the refresh icon. You can also manage the look of the Genie by using the sort and filtering features within the Genie.

Within Workforce Genies, you can sort columns of information by clicking the small arrow that appears when you hover over a column header to see your options for how to sort or group the data within the column.

Name	Employee Approval	Manager Approval	Approved Manager Names	Signed Off	Missed Punch	Unexcused Absence	Worked Hours	Leave Taken	Total Hours	Ex PP
Adams, Julie		1	Fryman, Christy		✓	✓	7:30	4:00	11:30	
Smith, Jack C		1	Fryman, Christy		✓		40:00		40:00	
Carpenter, Jill		1	Fryman, Christy		✓		30:30		30:30	
Ryan, Kayla		1	Fryman, Christy							
Tedder, Owen		1	Fryman, Christy				40:00		40:00	

Click **Refresh** to display the most current information.



### Filtering within Genies

Use the filter function to narrow down the number of employees you are viewing within the Genie.

After clicking the Filter icon, filter fields appear at the top of any columns that can be filtered. As you type in any of these filter fields, only rows containing the characters you type will remain in the workspace.

Name	Employee Approval	Manager Approval	Approved Manager Names	Signed Off	Missed Punch	Unexcused Absence	Worked Hours	Leave Taken	Total Hours	Expected PP Ho
Johnson, Jean		1	Fryman, Christy	✓			12:00	8:00	20:00	4
Johnson, Emily		1	Fryman, Christy							4

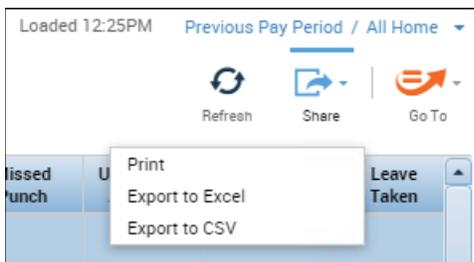


## Note

- You must click Refresh to ensure that you are viewing the most recent changes made to employee and application data.
- The Last Refreshed time in the upper left corner of the page identifies the most recent time you clicked Refresh.

## Sharing Data in a Workforce Genie

Workforce Genies display critical information in an easy-to-read format. You can print this information or export the data to other applications, such as Microsoft Excel, where you can reformat the data for your business needs.



## Note

When the exported file is opened with a compatible application, each row appears on a separate line or row.

## Locating Employees Using the QuickFind Genie

You can use the QuickFind Genie to search for a specific person or set of people. In QuickFind you can use the Name or ID field to change the list of employees that is displayed. You can also use the Time Period drop-down list to change the time frame of the records you want to view.

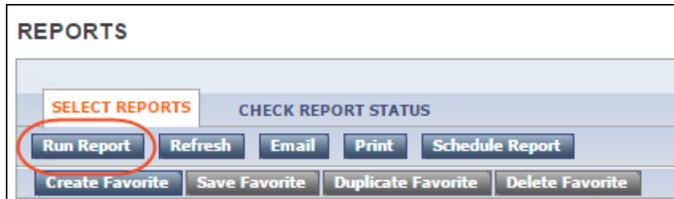
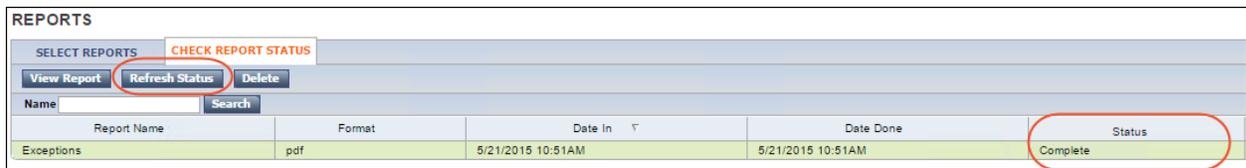
1. Navigate to the **QuickFind Genie**.
1. With the \* in the **Name or ID** field, click the **magnifying glass** to display all employees that you have access to.
2. In the **Name or ID** field, enter the last name or first 3 letters or a last name with the \* after your entry.
3. Click the **magnifying glass** or press **Enter**.
4. If applicable, from the **Time Period** drop-down list, select the applicable timeframe.
5. Click **Filter**.
6. In the filter field of the applicable column, enter a value to further narrow down your returned results.
7. Click within a column header to sort the column values in descending order.
8. Select the employee or employees from the list and perform the applicable action.

## Using Reports

### Running and Viewing Reports

#### Running a Report

1. From the **Related Items** pane, click the **Reports** widget.
2. On the **Select Reports** tab, expand the **All** category and select the report you need to run.
3. Select your **report criteria**.
4. Click **Run Report** and then click **Refresh Status**.

The screenshot shows the 'REPORTS' widget interface with the 'CHECK REPORT STATUS' tab active. It features a table with the following columns: Name, Report Name, Format, Date In, Date Done, and Status. The 'Refresh Status' button is circled in red. The table contains one row with the following data:

Name	Report Name	Format	Date In	Date Done	Status
Exceptions		pdf	5/21/2015 10:51AM	5/21/2015 10:51AM	Complete

The 'Complete' status in the table is circled in red.

5. When the status is **Complete**, click **View Report**. Note that the report opens in a separate window or tab, depending on your internet browser options.
6. Access the tab or window and review the report.

# Scheduling Staff for Specific Periods

## Assigning Base Schedules

### The Schedule Planner Widget

Workforce Timekeeper includes Schedule Planner, a powerful scheduling tool that helps you schedule worked and non-worked hours. The Schedule Planner presents a timeline view of employee schedules for a defined time period.

#### Tool bar

Control the schedule display, save date, refresh data, or access the Quick Actions tool bar.

#### Context Selector

Set options for the time period and group of employees.

The screenshot shows the 'Schedules' widget interface. At the top, there is a toolbar with icons for Quick Actions, View, Column Selection, Visibility Filter, Select all, Gantt View, Sorting, Tools, Refresh, View Comments, Share, Save, and Go To. Below the toolbar is a 'By Employee' section with a grid of employee names and their schedules for the period 5/31 - 6/06. The grid columns represent days from Sun 5/31 to Sat 6/06. The rows list employees such as Adams, Julie; Aguirre, Raymond; Anderson, James; Arick, Michael; Babson, Mildred; Baker, Ginger; Billings, Thomas; Boyd, Mary J; Brooks, Bob; and Carpenter, Jill. Each cell in the grid contains a time range, such as '9:00AM - 2:00PM'. Below the grid is an 'Indicators' section with a table showing 'All Days' and 'Employee Sch...' data.

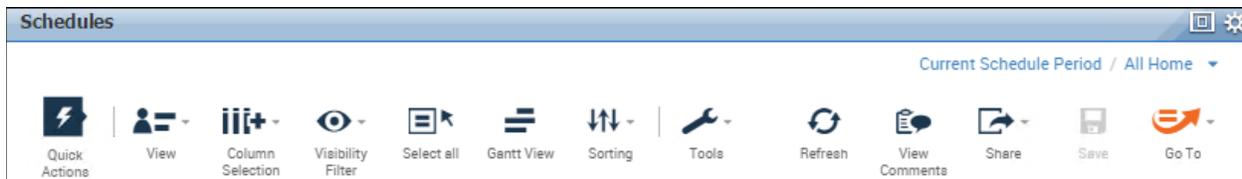
Indicators	All Days	Sun 5/31	Mon 6/01	Tue 6/02	Wed 6/03	Thu 6/04	Fri 6/05	Sat 6/06
Employee Sch...	1162:30	0:00	232:30	232:30	232:30	232:30	232:30	0:00
Employee Cou...	160.000	0.000	32.000	32.000	32.000	32.000	32.000	0.000

#### Schedule grid

Review schedule data and perform tasks on existing data. The information in the grid will vary depending on the selected viewing option.

#### Tool bar

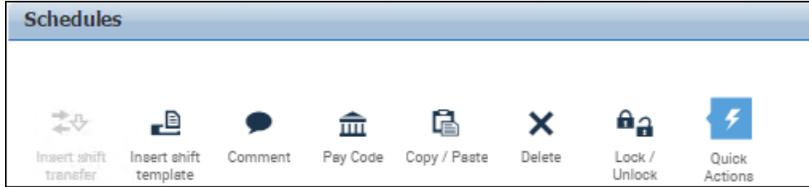
The toolbar is located along the top of the schedule grid and displays various viewing options and action buttons.



## Quick Actions

Quick Actions are one-click shortcuts that you can use to complete multi-step, common tasks. Using Quick Action shortcuts can reduce time spent on data entry as well as reduce data entry errors.

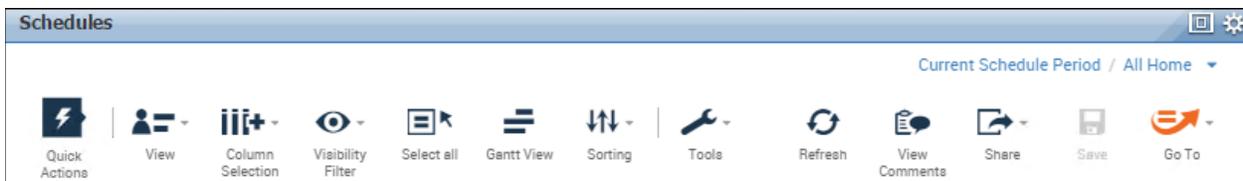
When you select the Quick Actions icon from the tool bar, the icon moves from left to right to reveal the Quick Action options.



Quick Action	How to use
Insert Shift Transfer	Click Insert Shift Transfer, select the transfer job or location, and select the shift in the schedule.
Insert Shift Template	Click Insert Shift Template, select the template, and select the applicable date cells.
Comment	Click Comment and select the applicable comment. Select the applicable shift or pay code to attach the comment.
Pay Code	Click Pay Code and select the applicable category and pay code. Select the applicable shifts to apply the pay code to.
Copy/Paste	Click Copy/paste and select the applicable shift to copy. Select the applicable date cell to paste the data.
Delete	Click Delete and click the applicable shifts, pay codes, or accruals.
Lock/Unlock	Click Lock/Unlock and then click an unlocked shift to lock it, or click a locked shift to unlock it.

## Viewing Options and Action Buttons

Select the icons in the Tool Bar to adjust the view of the data or to perform actions on the data.

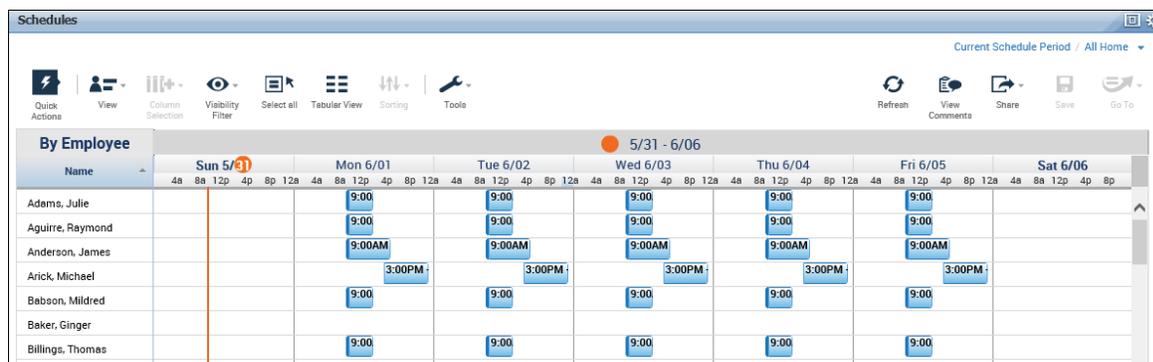


Menu item	How to use
Employee data views	<p>Employee schedule data can be viewed by employee, by group, or by employment terms. Select the view from the View menu located in the Action bar to change the view of the data that is presented.</p> <ul style="list-style-type: none"> <li>• By Employee: Alphabetical list of employees and their day-by-day schedules.</li> <li>• By Group: List of employees and their schedule groups. Employees not in a group are listed first as “Ungrouped Employees.”</li> <li>• By Employment Terms: List of employees organized by employment terms. Employment terms are legal contracts between employer and employees regarding the number of hours and specific schedule to be worked.</li> </ul>
Column Selection	Select available columns to add or remove from the grid. Your options may include Totals, Department, and Job.

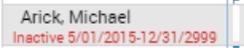
Menu item	How to use
Visibility Filter	You have the option to show or hide information that is available to you, like: Shift time, pay code name, accrual name, assigned shifts, pay codes, scheduled accrual amounts, and holidays.
Select All	Click this icon to select all of the items within the schedule.
Schedule views	There are three different schedule views available within Scheduler Planner to help you to view and perform actions on schedule data. Available views are Gantt view, Tabular view, and minimized view.
Sorting	Click the icon to sort data within columns.
Tools	Click the icon to Manage employee schedule request periods.
Refresh the schedule	Click icon to revert back to the last save. Click Yes to discard unsaved changes and click No to save changes (and then click Save).
View Comments	Click the icon to view comment information associated with schedule data
Share	Using the share feature, data can be printed or exported from the Scheduler Planner to an excel file.

## Gantt View

- The Gantt view can be used while viewing data by employee, by job, or by schedule group. To access the Gantt view, click Gantt view in the Actions bar.



The following table describes the Gantt view indicators and their functions.

Indicator	Indicator Image	Description
Orange highlights and vertical line		Displays the current date and time
Employee lines that are shaded gray		Indicates inactive employees
Red exclamation within cell		At least one violation has a severity of No Save
Orange exclamation within cell		At least one violation has a warning severity
Yellow exclamation within cell		At least one violation has an informational severity
Blue cells		Indicates assigned shifts

Indicator	Indicator Image	Description
Green cells		Indicates that a pay code is being used
Purple cells		Indicates that accruals are being used

## Tabular View

- Tabular view can be used while viewing data by employee, by job, or by schedule group. To access Tabular view, click Tabular view in the Actions bar. There are some restrictions when using the tabular view:
  - Does not display segment information, only shift labels or start/end times
  - Shows shifts only in the day the shift starts, even if the shift extends to the next day

By Employee	Sun 5/10	Mon 5/11	Tue 5/12	Wed 5/13	Thu 5/14	Fri 5/15	Sat 5/16
Adams, Julie		9:00AM - 2:00PM					
Aguiar, Raymond		9:00AM - 2:00PM					
Anderson, James		9:00AM - 8:00PM					
Jrck, Michael		2:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	
Sabson, Mildred		9:00AM - 2:00PM					
Baker, Ginger							
Billings, Thomas		9:00AM - 2:00PM					
Boyd, Mary J							
Brooks, Bob		9:00AM - 5:00PM					
Carpenter, Jill		11:00PM - 7:30AM					
Clifford, Lisa							
Crowsoft, Michael							
David, Rodney		9:00AM - 5:00PM					
Evans, Edna		7:00AM - 3:30PM					
Fallon, Jane							

The following table describes the Tabular view indicators and their functions.

Indicator	Indicator Image	Description
Orange highlights		Displays the current date
Blue cap in cell		Indicates an assigned shift
Two shades of blue cap in cell		Indicates a shift that contains a transfer
Green cap in cell		Indicates that a pay code is being used
Purple cap in cell		Indicates that an accrual is being used

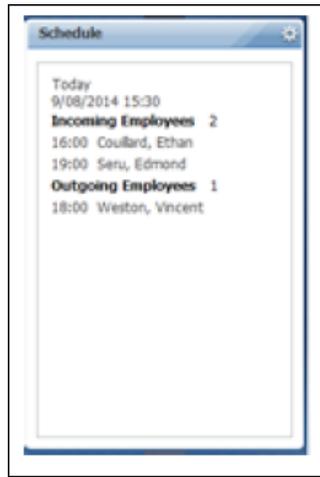
## Editing Schedules in Tabular View

To edit schedules within tabular view, you can:

- Double-click a shift to edit shift times or labels within a cell
- Press tab or use the keyboard arrows to move between cells

## Minimized View

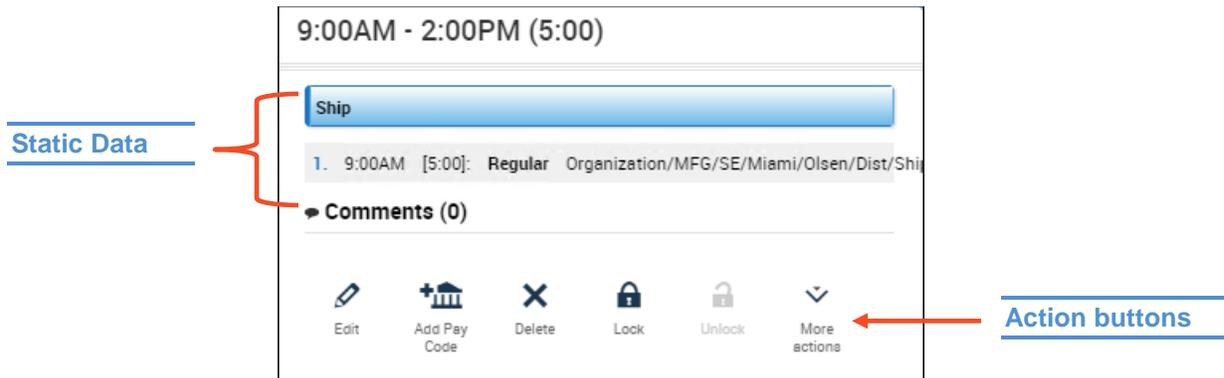
- When you minimize the Schedule Planner widget, it continues to show basic schedule information while another widget is open in the primary view.



## Call Outs

Call outs contain static information about items within the Schedule Planner. Call outs can also contain action buttons to help you perform tasks.

To view a call out, right click on the applicable cell.



## Day/Week Schedule Viewing Options

Schedule views can be adjusted so that you are viewing schedule details for a specific day, or specific timeframe.

### Viewing Information for a Day

Click the column header of the applicable date to switch the schedule planner view so that you are viewing schedule information for a specific day.

By Employee		5/31 - 6/06
Name		Wednesday 6/03
Adams, Julie <i>Signed off period</i>	9:00AM - 2:00PM	
Aguirre, Raymo...	9:00AM - 2:00PM	
Anderson, Jam...	9:00AM - 5:00PM	
Arick, Michael	3:00PM - 11:30PM	
Babson, Mildred	9:00AM - 2:00PM	
Baker, Ginger		

## Viewing Information for a Period of Time

Click the column header containing the range of dates for the schedule planner.

By Employee		5/31 - 6/06			
Name		Sun 5/31	Mon 6/01	Tue 6/02	Wed 6/03
Baker, Ginger					
Billings, Thomas			9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM
Boyd, Mary J					



## Note

Organizations can customize columns in the Schedule Planner; therefore, you might see different Schedule Planner columns.

Contact your Workforce Timekeeper Application Administrator to include or remove columns so you see only the information you need to perform your scheduling tasks.

The Department and Job columns are available only to organizations that implement organizational maps and jobs.

If your Application Administrator has set up the employee self-service feature, you will be able to track all requests from the Schedule Planner. This is true regardless of the state of the request (submitted, approved, or denied). All requests will also remain in the database for searching and/or tracking.

## Employee Tool Tip

Schedule Planner data appears before the Day columns (Sun-Sat) and are included in summary format in the Employee tool tip. This is helpful if you want to include additional columns in the Schedule Editor (such as badge number, e-mail address, and phone number(s)) but also want to maximize the number of Day columns visible without scrolling.

## Schedule Patterns

### What is a Schedule Pattern?

A schedule pattern is:

- A group of shifts that repeat over a specified time period
- Includes a start and end date
- Controls the shift assignments for employees
- Facilitates exception-based tracking of time and enforcement of restrictions and rounding rules

### Pattern Templates

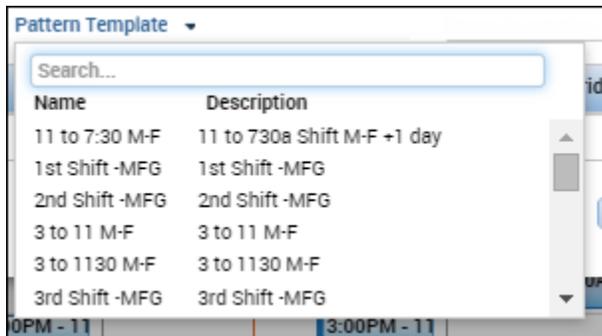
Patterns can be entered manually or by using a pattern template. A pattern template is a reusable tool that contains one or more shifts that rotate over a period of time.

Pattern templates include:

- Pattern name and description
- Recurring interval that defines the number of days or weeks over which the pattern repeats
- Shifts associated with the pattern

You assign a pattern template to one or more employees for a specific time period to quickly create standard elements in employee schedules. Then, you fill in each employee's unique schedule information.

Use the Select Pattern dialog box to quickly assign a schedule pattern to employees. Then fill in each employee's unique information.



## Assigning Schedule Patterns

When a new employee is added to Workforce Timekeeper, you can also assign a schedule pattern to the employee. If it does not exist, a pattern might need to be added to an employee's record.

## Using the Pattern Editor

If your organization uses schedule patterns, you might occasionally need to add a new pattern or change an existing pattern. Use the Pattern Editor to add, modify, and delete assigned schedule patterns. The following illustration shows a sample Pattern Editor for an employee with an assigned pattern. Notice that the employee is scheduled to work from 9:00 A.M. to 5:00 P.M. Monday through Friday.

### Schedule Pattern

Assigned to  
Davis, Rodney Primary job Organization/MFG/SE/Miami/Olsen/Supr

	Start Date	End Date	Duration	Rotation
		6/01/2008	Forever	1 week
1 Week: 9a - 5p (Mon, Tue, Wed, Thu, Fri)				

**Edit Pattern**

Anchor Date: \* 6/01/2008 Start Date: \* 05/10/2015 End Date: \*  Clear

Forever

Define Pattern for: \*   Week(s)  Day(s)  Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template |  Find

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		9a-5p	9a-5p	9a-5p	9a-5p	9a-5p	

## Modifying Schedule Patterns

You might determine that an existing pattern is not exactly what you need. The following illustration shows an example in the Pattern Editor with a shift change in Friday's cell. Notice the color change in Friday's cell that indicates that the shift designation is different from the original schedule pattern assignment.

### Schedule Pattern

Assigned to  
Davis, Rodney Primary job Organization/MFG/SE/Miami/Olsen/Supr

	Start Date	End Date	Duration	Rotation
		5/10/2015	Forever	1 week
1 Week: 9a - 5p (Mon, Tue, Wed, Thu), 11a - 5p (Fri)				

**Edit Pattern**

Anchor Date: \* 6/01/2008 Start Date: \* 05/17/2015 End Date: \*  Clear

Forever

Define Pattern for: \*   Week(s)  Day(s)  Override Other Patterns

Add Shift | Add Pay Code | Shift Template | Pattern Template |  Find

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		9a-5p	9a-5p	9a-5p	9a-5p	11a-5p	



## Note

Use the Pattern Editor or Shift Editor to modify the schedule pattern.

### Assigning a Schedule Pattern

1. From **Schedule Planner**, right-click the applicable employee's name.
2. Click **Schedule Pattern**.
3. Verify the **Anchor date**.
4. In the **Start Date** field, enter the start date of the pattern.
5. In the **End Date** field, enter the date the pattern should end, or select **Forever** if there is no end date.
6. In the **Define Pattern for** field, enter the number of weeks or days you are defining the pattern for.
7. Select the corresponding option from either **Week(s)** or **Date(s)**.
8. From the **Pattern Template** drop-down list, select the applicable pattern.
9. Verify that the template populates the calendar grid, and click **Apply**.
10. Click **OK**.
11. Verify that the pattern has populated the **Scheduler Planner** grid.
12. Click **Save**.

## Scheduling Staff to Meet Workload Requirements

### Modifying Shift Assignments

If you have employees that work similar hours during each schedule period, you can assign schedule patterns to those employees so their schedules repeat every schedule period.

However, employees might occasionally need to work alternative shifts.

#### Shift Assignment Tasks

Enter an "X" beside the task you need to perform in your organization.

Task	I need to perform this task
Add a shift	
Edit a shift	
Delete a shift	
Restore a shift	



#### Note

If you delete a shift that is part of a pattern, the shift can later be restored, however, it can only be restored to the last saved pattern for the employees.

#### Adding a Shift by Typing in a Cell

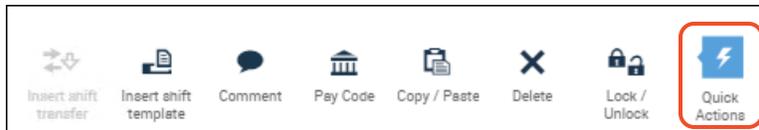
1. In the **Schedule Planner**, using the **Context Selector**, ensure that the group of employees you want, and the time period in which you want to add a shift, are displayed.
2. Click a **date cell** for an employee.
3. In the cell, enter the **start** and **end times** of the shift separated by a hyphen, and then press the **Tab** key.
  - For example, enter 9a-530p and then press the **Tab** key.



4. Click **Save**.
  - Note that you can enter time using either 12-hour or 24-hour time formats. For example, you can enter 8:00 A.M. to 5:00 P.M. as 0800-1700 or as 8a-5p.

#### Adding a Shift Assignment Using Copy and Paste

1. Within **Scheduler Planner**, click **Quick Actions** to reveal the **Quick Actions** menu.



2. Click **Copy/Paste**.
3. Click the **cell** you want to copy.
4. Click the **cell(s)** you would like to paste the information to.

By Employee		7/05 - 7/11						
Name	Sun 7/05	Mon 7/06	Tue 7/07	Wed 7/08	Thu 7/09	Fri 7/10	Sat 7/11	
Baker, Ginger								
Billings, Thomas		10:00AM - 5:00PM	10:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM		
Boyd, Mary J		10:00AM - 2:00PM	10:00AM - 2:00PM	10:00AM - 2:00PM				
Brooks, Bob		9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM		

5. Click the **Copy/Paste** function again to turn the feature off.
6. Click **Save**.

## Shift Editor

You can add and modify simple shifts directly in the Schedule Planner by typing directly in the cell or by copying and pasting an existing shift. However, for more complex shifts, use the Shift Editor.

The Shift Editor is a scheduling tool that lets you create and modify a shift and its associated shift segments for one or more employees.

The following illustration shows a sample Edit Shift dialog box containing a shift with the three segments.

### Edit Shift

Assigned to: Brooks, Bob      Shift Details: 9:00am-8:00pm(11.00h)      Primary Job: ...anization/MFG/SE/Miami/Olsen/Asmb/FAmb/AsbBO

Insert Template: ▼      Shift Label:       Repeat this shift For (D):  days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="checkbox"/>	5/15/2015	Regular	9:00am	5:00pm	5/15/2015	8:00			
<input type="checkbox"/>	5/15/2015	Break	5:00pm	6:00pm	5/15/2015	1:00			
<input type="checkbox"/>	5/15/2015	Regular	6:00pm	8:00pm	5/15/2015	2:00			

Comments (0) [Add Comment](#)

## Shift Editor Tasks

Enter an "X" beside the task you need to perform in your organization.

Task	I need to perform this task
Create a shift with multiple segments	
Assign a shift label to an entire shift	
Add one or more comments to the shift	

## Adding a Shift Using the Shift Editor

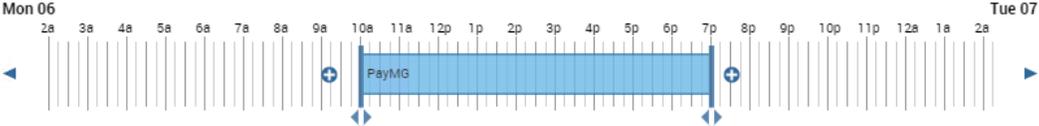
1. Locate the employee's row and right-click the **cell** in the row and under the date where you want to add a shift.
2. Select **Add Shift**.
3. In the **Shift Editor**, confirm that the **Employee** and **Start Date** are correct. You can either click **Insert Template** and seek a preformatted shift template, or manually create a shift.

4. To manually enter a shift, select a shift type from the **Type** drop-down list, and enter a **Start Time** and **End Time**.
5. If the shift contains multiple segments, click **+** to add a row and repeat steps 4 and 5 as necessary.
6. Confirm that the date in the **End Date** field is correct. If the shift segment crosses a day divide, change the shift's end date to the following day.
7. In the **Repeat this shift for** field, enter the number of consecutive days you want to schedule this shift.

### Add Shift

Assigned to: Clifford, Lisa    Shift Details: 10:00am-7:00pm(9:00h)    Primary Job: Organization/MFG/SE/Miami/Olsen/PayMG

Insert Template: ▼    Shift Label:     Repeat this shift for:  days



	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	7/06/2015	Regular	10:00am	7:00pm	7/06/2015	9:00		

Comments (0) [Add Comment](#)

8. Click **Apply** and then click **Save**.

## Scheduling Non-worked Hours Using the Pay Code Editor

### Non-worked Hours Overview

Although employees are scheduled to specific work hours each week, events occur that cause employees to miss time. Employees might communicate this missed time to their managers in advance, allowing managers to make appropriate changes to the scheduled workforce.

### Pay Code Editor

Use the Pay Code Editor to schedule non-worked hours for one or more days for employees.

### Edit Pay Code Daily-OT

Assigned to: **Brooks, Bob**

Effective Date: \*

Pay Code: \*

Amount (hh:mm): \*

Override Shift

Whole Shift     Partial Shift

Start Time: \*

Repeat for:  days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

## Accessing the Pay Code Editor

You can access the Pay Code Editor from any of the following:

- Schedule Planner
- Detail Genie
- Roll-up Genie



## KnowledgePass

If you are a Workforce Leave manager with access to KnowledgePass, refer to the *Editing Leave in a Timecard or Schedule* job aid for additional information.

## Scheduling Non-Worked Hours

1. In the **Schedule Planner**, locate the employee's row and right-click the applicable date cell where you want to schedule non-worked hours.
2. Select **Add Pay Code**.
3. Confirm that the correct **Effective Date** appears.
4. From the **Pay Code** drop-down list, select the applicable pay code.
5. In the **Amount** field, enter the number of non-worked hours. If applicable, you can select **Full Scheduled Day** or **Half Scheduled Day**.
6. If the non-worked hours must replace an existing shift, select the **Override Shift** check box. Then select **Whole Shift** to override the entire shift, or **Partial Shift** to override only those hours that overlap with the non-worked hours.
7. In the **Start Time** field, enter start time for the pay code.
8. In the **Repeat for** field, enter the number of consecutive days to schedule this non-worked time.

### Add Pay Code

Assigned to  
Davis, Rodney

Effective Date: \*

Pay Code: \*

Amount (hh:mm): \*

Override Accrual Days:

Override Shift

Whole Shift  Partial Shift

Start Time: \*

Repeat for:  days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

9. Click **Apply** and then click **Save**.

# Monitoring Timecards to Facilitate Payroll Processing

## Reviewing Notifications of Time Data

### Using the Exceptions Alert and Widget

The Exceptions widget can help you to manage employee time data exceptions quickly and efficiently. You can access the widget using the following methods:

- Clicking the Exceptions alert; this activates the Exceptions widget and moves the data to an open workspace.
- Clicking and dragging the Exceptions widget to the open workspace.
- Clicking the widget to open it in a temporary workspace.

### The Exceptions Alert

The Exceptions alert quickly draws your attention to time data issues in timecards for hourly employees. It is:

- An optional configuration.
- Applicable only to hourly employees who have triggered a time data exception that requires your attention.
- Available when you log in; it displays an alerts indicator in the top center or your navigator.

Time data exceptions alerts can notify you about issues such as missed punches, late or early in punches, and late or early out punches that require your immediate attention.

The alert icon includes a number in the upper-right corner that tells you how many employees have time data issues.

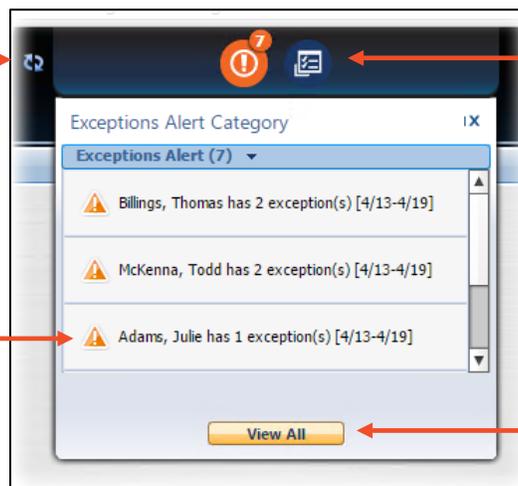
Select an employee from the list to access the Summary and Details views of the exceptions widget. When you click an employee's name, you are brought to the Details view of the Exceptions widget.

#### Refresh

Click the Refresh icon to get immediate updates to your alerts.

#### Alert Details

Click an item in the details of an alert to open the relevant widget. You can then take whatever actions are needed in the open widget.



#### Alert Icons

Each type of alert has its own icon. A number in the icon's corner indicates that there are items you should review. Click an icon to view details.

#### View All

Click to open the Alerts and Notifications widget. This provides more room for reviewing alerts, and may also include uncategorized alerts and notifications that are not actionable.

## The Exceptions Widget

The Exceptions widget is a specialized widget that displays exception data for hourly employees or employees who punch in and out to track their worked time. Managers can perform most of the tasks they need to accomplish on their employees' time data in the Exceptions widget. Some of the key functions that can be performed in the detail view include:

- Add and remove punches
- Add comments
- Mark exceptions as reviewed
- Change an employee's time to their normally scheduled time



### Note

The exceptions widget displays time data exceptions for hourly employees only. There are two views in the widget:

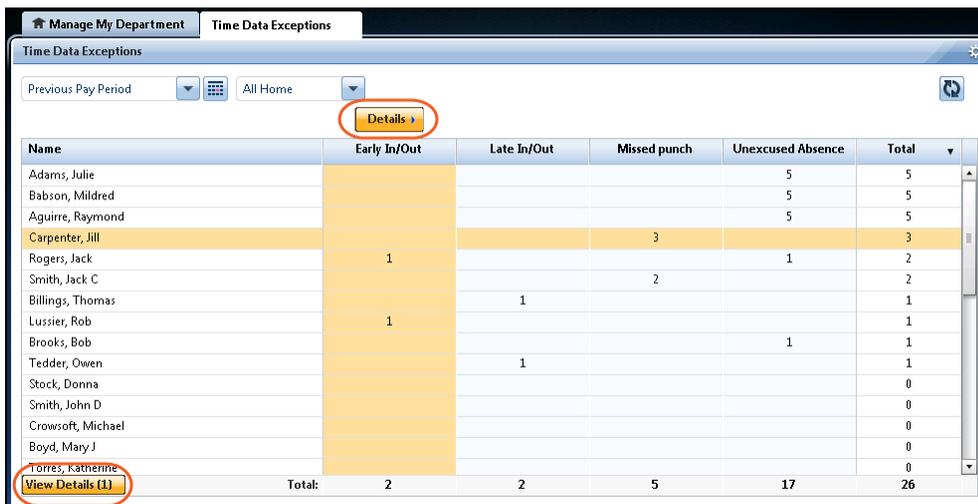
- Summary
- Details

## Exceptions Summary View

The Summary view:

- Provides an at-a-glance view of employee exceptions
- Displays one or more exception types by column
- Allows your organization to configure the columns based on your business requirements
- Displays exceptions by employee

Selecting an employee activates the Details button, which allows you to view details for one employee at a time. When you hover over any column, the Details button is enabled. Selecting the Details button allows you to view details for all employees who have that type of exception.



Name	Early In/Out	Late In/Out	Missed punch	Unexcused Absence	Total
Adams, Julie				5	5
Babson, Mildred				5	5
Aguirre, Raymond				5	5
Carpenter, Jill			3		3
Rogers, Jack	1			1	2
Smith, Jack C			2		2
Billings, Thomas		1			1
Lussier, Rob	1				1
Brooks, Bob				1	1
Tedder, Owen		1			1
Stock, Donna					0
Smith, John D					0
Crowsoft, Michael					0
Boyd, Mary J					0
Torres, Katherine					0
<b>Total:</b>	<b>2</b>	<b>2</b>	<b>5</b>	<b>17</b>	<b>26</b>

## Details View

The Details view is populated only when an employee has an exception. If there are no exceptions, the Details view for the employee is blank. From this view, you can:

- See the dates and exception details
- Access an employee's hourly timecard view
- Toggle to display or hide an employee's schedule
- Resolve exceptions manually or by using one of the available action buttons

Accessed from Summary view, the Details view provides access to in and out punches, schedule data, and more details about exceptions. In this view, you can also resolve exceptions and enter comments.

## Visual Indicators in the Details View

The Details view provides several visual indicators to help you quickly interpret the data on the screen.

Exception Type	Details View Visual Indicator
Unexcused absence	Date displayed in red text
Early in/out or late in/out	In or out time displayed in red text
Missed punch	In or out time cell filled with solid red
Reviewed exception	In or out time displayed in green

## Resolving Exceptions in the Exceptions Widget

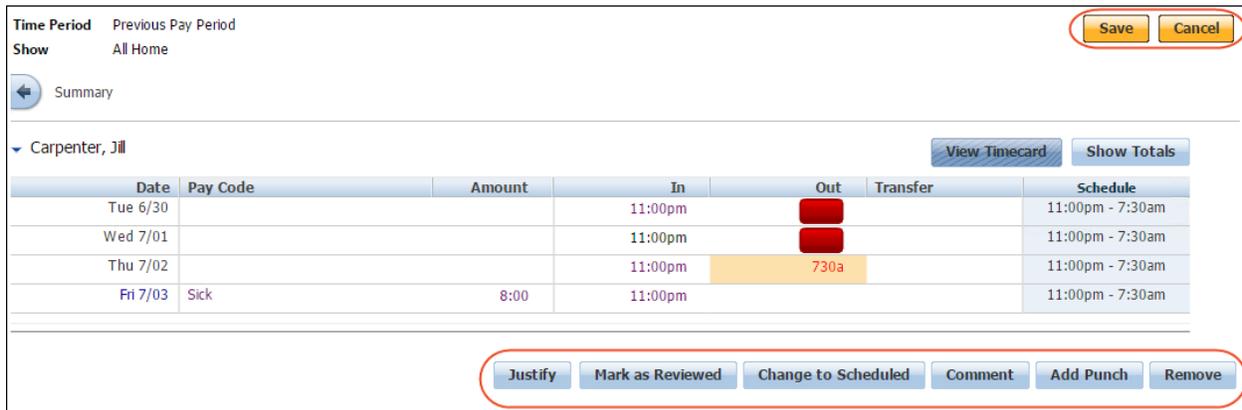
### Resolving Exceptions in the Exceptions Widget

#### Action Buttons in the Exceptions Widget

Depending on the type of exception and its status, action buttons appear along the bottom of the page. Only the relevant actions are available. The following table lists and describes the action buttons you will see in the Exceptions widget.

Action button	Description
Save	Save your changes to the database.
Cancel	Cancels changes that you made prior to saving.
Justify	Allows you to review exceptions that were either justified by employees or that need to be justified by you. You can approve the employee change, approve application-delivered resolution, or justify the exception. Once justified, the exception color changes to green.
Mark as Reviewed	Indicates that you have reviewed the exception, and that no further action is required. The color of the exception changes to green and the Mark as Reviewed button changes to Unmark as Reviewed.
Change to Scheduled	Changes a missed in or out punch to the scheduled time. This feature only works for employees who have assigned schedules.
Comment	Adds a comment, and optionally a note, to an employee's punch data.
Add Punch	Opens the Add Punch dialog box and inserts a punch time.
Remove	Removes punch data.

The following image highlights the action buttons within the Exceptions widget.



The screenshot shows the 'Summary' view for an employee named 'Carpenter, J'. The table displays punch data for dates from Tue 6/30 to Fri 7/03. The 'Out' column for Thu 7/02 shows a red '730a' exception. At the bottom of the widget, a row of action buttons is highlighted with a red circle: Justify, Mark as Reviewed, Change to Scheduled, Comment, Add Punch, and Remove. Above the table, 'Save' and 'Cancel' buttons are also visible.

Date	Pay Code	Amount	In	Out	Transfer	Schedule
Tue 6/30			11:00pm			11:00pm - 7:30am
Wed 7/01			11:00pm			11:00pm - 7:30am
Thu 7/02			11:00pm	730a		11:00pm - 7:30am
Fri 7/03	Sick	8:00	11:00pm			11:00pm - 7:30am

#### Tool Tip for Resolving Exceptions

The Details view of the Exceptions widget provides tips for resolving each particular exception type. If you hover the cursor over a time data exception, the application displays a recommendation.

In	Out	Transfer
10:00am	2:00pm	
<div style="background-color: yellow; padding: 5px;"> <p><b>Late In</b></p> <p>(Mark the punch as reviewed to acknowledge the exception, or if you have the appropriate access rights, double-click the punch to correct it if it was entered erroneously.)</p> </div>		

## Resolving Punch Issues

### Using Change to Scheduled

To fix a missed punch exception, you can use the Change to Scheduled option. This button is available only with missed punch exceptions for employees who have schedules assigned to them.

If you know that the employee started work or left on time and simply forgot to punch, click the cell containing the missed punch to activate the **Change to Scheduled** button. The button is available only when the missing punch is either the first punch of the day or last punch of the day. For missing punches in the middle of the day, only the Add Punch option is available.

### Resolving a Missed Punch with Change to Scheduled

1. Access the **Time Exceptions** widget.
2. From the **Time Period** drop-down list, select the applicable pay period.
3. Select the applicable group.
4. Select the applicable employee and then click **View Details**.
5. Click the cell with the missing punch and click **Change to Scheduled**.
6. Click **Save**.

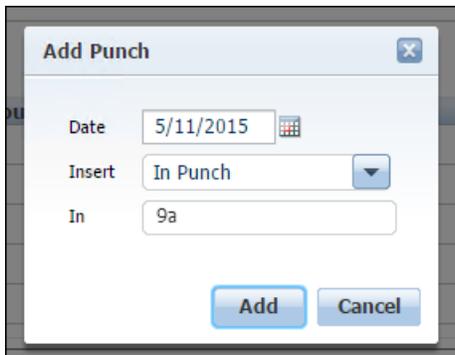


### Note

The Change to Scheduled button is only available when the missing punches are either the first or last punch of the shift. For missing punches in the middle of a shift, use the Add Punch option.

### Using Add Punch

The Add Punch feature allows you to enter punch information in the time data using the Add Punch dialog box. In this dialog box, you can select the punch type and enter a punch time.



The Add Punch dialog box contains the following fields and controls:

- Date:** A text field with the value "5/11/2015" and a calendar icon to its right.
- Insert:** A dropdown menu with "In Punch" selected.
- In:** A text field with the value "9a".
- Buttons:** "Add" and "Cancel" buttons at the bottom.

## Adding a Punch in the Exceptions Widget

1. In the **Details** view in the Exceptions widget, click the cell containing the exception and then click **Add Punch**.
2. In the **Add Punch** dialog box, confirm the date. From the **Insert** drop-down list, select the applicable punch option.
3. Enter the appropriate punch time and click **Add**.
4. Click **Save**. Confirm that the exception no longer appears in the time detail view.



### Note

You can also double-click a punch cell and enter a punch.

## Unsaved Data Indicators

When you change any time or data information in the Exceptions widget, the Save and Cancel buttons turn orange, indicating that there is unsaved data.

- Click **Save** to write the edits to the database.
- Click **Cancel** to refresh the data, which reverts the data to its previous condition.

When you save or cancel, both indicator buttons become inactive.

Date	Pay Code	Amount	In	Out	Transfer	Schedule
Tue 5/12			11:00pm	7:30am		11:00pm - 7:30am
Wed 5/13			11:00pm			11:00pm - 7:30am
Fri 5/15						11:00pm - 7:30am
Sat 5/16				7:30am		

## Phantom data

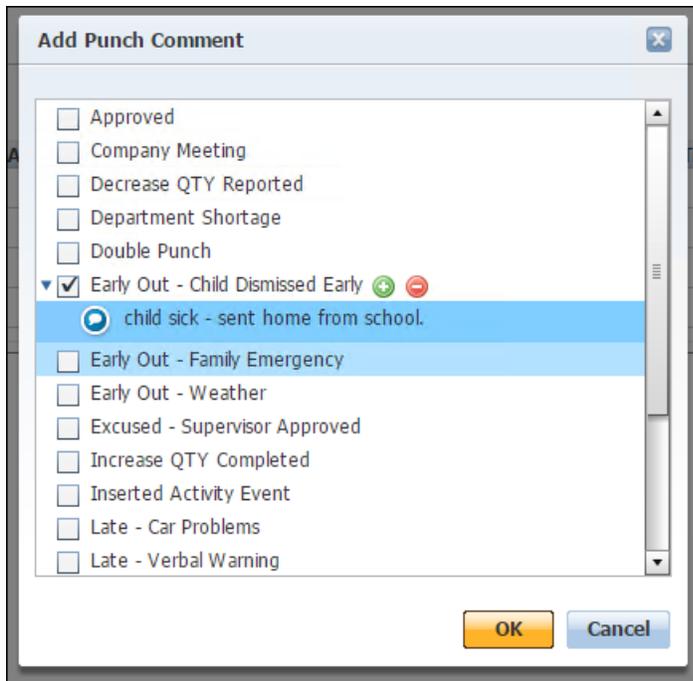
Punches and pay code amounts that appear in purple text represent phantom data. Workforce Timekeeper automatically adds these entries to a timecard based on an employee's schedule assignment.

Pay Code	Transfer	Mon 5/11	Tue 5/12	Wed 5/13	Thu 5/14	Fri 5/15	Sat 5/16	Sun 5/17	Total
Hours Worked		8:00	8:00	8:00	8:00	8:00			40:00
<Enter Pay Cod...									
Schedule		9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM			
Daily Total		8:00	8:00	8:00	8:00	8:00			40:00

## Entering Comments

Comments are predefined, organization-specific descriptions that you attach to punches to provide additional information about that transaction.

Comments let you document specific details of worked and non-worked hours to help you with future analysis. If you have access, you can also add free-text notes to comments for clarification.



## Adding a Comment

1. After making an edit within the **Time Data Exceptions** widget for an employee, access the details view.
2. Select the applicable punch.
3. Click **Comment**.
4. Select the applicable comment.
5. If applicable, click the **+** to add a clarifying note.
6. Click **OK**.
7. Click **Save**.
8. Validate that the comment is attached to the punch by hovering over the applicable punch.
9. To view any added notes, select the applicable punch and click **Comment**.
10. Scroll down and click the **+** next to the selected comment. The note text appears.
11. Click **Cancel** to exit the screen.

## Marking an Exception as Reviewed

Even if alerts are not configured, managers can view summary and details of any employee time data exception by accessing the Exceptions widget. Managers can perform most of the key tasks they need to accomplish on their employees' time data in the Exceptions widget, including marking and unmarking an exception as reviewed.

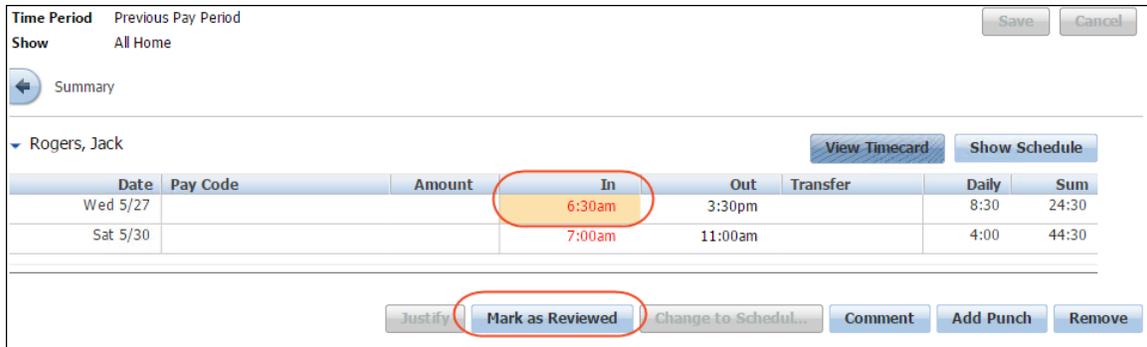
You would mark an exception as reviewed to indicate that you have seen it, and do not want to see it repeatedly in general queries and searches. Only punch exceptions can be marked as reviewed.

Note that after an exception is marked as reviewed, it disappears from the Summary view of the Exceptions widget, and it appears with a green check mark in the Reconcile Timecard Genie if all exceptions of that type have been marked as reviewed.

## Marking Exceptions as Reviewed

1. The **Details** view, select the cell containing the exception.
2. Click **Mark as Reviewed**.

The exception turns from red to green.



Time Period Previous Pay Period  
Show All Home

Summary

Rogers, Jack

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Wed 5/27			6:30am	3:30pm		8:30	24:30
Sat 5/30			7:00am	11:00am		4:00	44:30

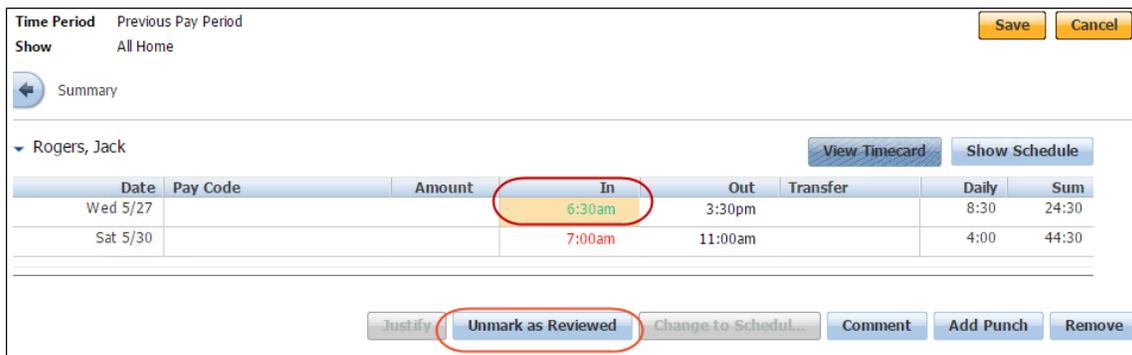
Buttons: Justify, Mark as Reviewed, Change to Schedul..., Comment, Add Punch, Remove

3. Click **Save**.

## Unmarking Exceptions as Reviewed

1. In the **Details** view, select the cell containing the exception.
2. Click **Unmark as Reviewed**.

The exception turns from green to red.



Time Period Previous Pay Period  
Show All Home

Summary

Rogers, Jack

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Wed 5/27			6:30am	3:30pm		8:30	24:30
Sat 5/30			7:00am	11:00am		4:00	44:30

Buttons: Justify, Unmark as Reviewed, Change to Schedul..., Comment, Add Punch, Remove

3. Click **Save**.



## Tip

Add a comment to a resolved exception if you want to note additional information about the resolved exception.

Use HyperFind functionality to search for resolved exceptions and general exceptions.

## Removing a Punch

Many organizations discourage the modification of punches that originate from data collection sources, such as a Kronos 4500 device, because these punches reflect actual times an employee worked. However, there are exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. If this occurs, you can delete the double punch.

### Removing a Punch

1. Access the **Time Data Exceptions** widget and select the applicable pay period.
2. Select the applicable employee and click **View Details**.
3. Click the applicable punch and click **Comment**.
4. Select the comment that represents the reason for the punch removal.
5. Click **OK**.

6. Click **Save**.
7. Click the applicable punch cell again and then click **Remove**.
8. Click **Save**.
9. To verify that this issue was resolved, navigate back to the **Summary** view of the **Time Data Exceptions** widget.
10. With the applicable employee selected, access **GoTo > Audits**.
11. Verify that the deleted punch and comment attached to the deleted punch appear within the grid.

Time Period: Previous Pay Period Save Cancel

Show: All Home

Summary

Billings, Thomas View Timecard Show Schedule

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Fri 5/29			■	2:00pm			16:00

Audits Previous Pay Period/1 Employee(s) Selected

Category: Audits Type of Edit: All

Billings, Thomas 3 1 of 1 Refresh Go To

Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time
5/29/2015	10:00AM	Add Co...					In Punch	Excused - Supervisor Approved	5/05/2015	10:54A...
5/29/2015	10:00AM	Delete P...					In Punch		5/05/2015	10:54A...

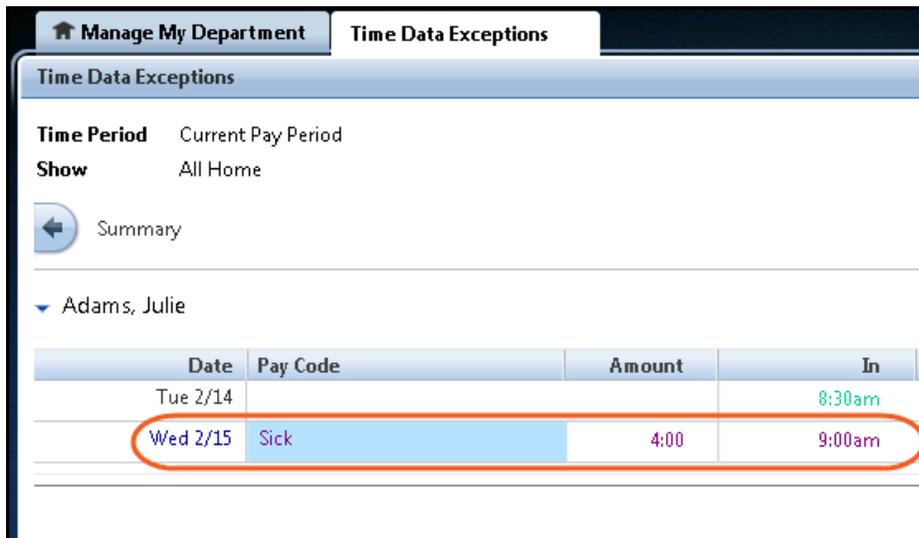
### Recommended Practice

Before you remove a punch, attach and save a comment to it. You cannot add a comment to a punch after the punch is deleted. Adding a comment provides documentation about why you deleted the punch

## Using Pay Codes to Track Non-Worked Time

Although employees are scheduled to work specific hours each week, inevitably events occur that cause employees to miss time. In addition, there may be circumstances when employee's need to be paid above and beyond their worked hours. For example, a bonus payout needs to be added to an employee's pay.

Pay codes facilitate payroll processing by grouping specific types of worked and non-worked hours and monetary amounts to accurately track time data.



Date	Pay Code	Amount	In
Tue 2/14			8:30am
Wed 2/15	Sick	4:00	9:00am



### Note

The application also supports the use of combined pay codes. Combined pay codes are totals of several pay codes and appear in the Totals tab of the timecard, or in a report.

For example, you might create a combined pay code named All Worked that is a sum of all worked pay codes.

### Adding Non-worked Time

Most organizations have a variety of pay codes, such as holiday, vacation, and bereavement leave, which let employees track non-worked hours to an appropriate category.

1. In the **Details** view, hover your cursor over the **Pay Code** cell and click the **green plus** sign.
2. In the **Pay Code Edit** dialog box, select the appropriate pay code from the **Pay Code** drop-down list.
3. In the **Amount** field, enter the number of hours using an acceptable format, or select one of the scheduling amount options.
4. If necessary, modify the value in the **Start Time** field.
5. Click **OK**.
6. In the **Details** view, click **Save**.



## Note

- Workforce Timekeeper converts entries to your organization's default time format.
- Pay codes that appear in the Pay Code drop-down list in a timecard are specific to the task of entering and editing employee time. Different pay codes might appear for selection when you generate a report or view data in a Workforce Genie.

## Accessing Hourly and Project Timecards

Workforce Central provides several methods for accessing hourly and project employee timecard data, including:

- Via the View Timecard link in the Exceptions widget Details view
- Using a Workforce Genie
- Using a GoTo Navigation link

### Accessing Timecards via the View Timecard Link In the Exceptions Widget Details View

If an employee appears with an exception in the Exceptions widget Summary view, you can select the employee and click **View Details**.

Name	Early In/Out	Late In/Out	Missed Punch	Unexcused Absence	
Adams, Julie				1	
Aguirre, Raymond				1	
Babson, Mildred				1	
Baker, Ginger					
Billings, Thomas				1	
Boyd, Mary J					
Brooks, Bob					
<b>View Details (1)</b>	<b>Total:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4</b>

From the Details view, you can click View Timecard to access the employee's timecard.

**Time Period** Current Pay Period Save Cancel

**Show** All Home

← Summary

▼ Adams, Julie View Timecard Show Schedule

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Mon 10/28							

Justify Mark as Reviewed Change to Schedul... Comment Add Punch Remove

The employee's timecard appears. You can perform an action on the timecard, or close the timecards workspace to return to the Details view of the Exceptions widget.

### Accessing Timecards via a Genie

You can access a timecard from a Genie by double-clicking the employee's name.

### Accessing Timecards via GoTo Navigation

Depending on how your navigator is configured, you may have a GoTo Control icon in the upper-right corner of some widgets.

Pay Period Close ▾ Loaded 8:27AM Previous Pay Period / All Home ▾

Select All Rows Column Selection Filter People Timekeeping Accruals Approval Schedule Refresh Share **Go To**

Name	Employee Approval	Manager Approval	Approved Manager Names	Signed Off	Missed Punch	Unexcused Absence	Worked Hours	Leave Taken	Total Hours
Adams, Julie						✓			
Aguirre, Raymo...						✓			
Anderson, Jam...							80:00		

GoTo navigation is configurable, so it is possible to configure this control to provide a link directly to an employee timecard.

To access the timecard, you select one or more employees, click the GoTo control, and select the Employee Timecard link.

Pay Period Close ▾ Loaded 8:27AM Previous Pay Period / All Home ▾

Select All Rows Column Selection Filter People Timekeeping Accruals Approval Schedule Refresh Share **Go To**

Name	Employee Approval	Manager Approval	Approved Manager Names	Signed Off	Missed Punch	Unexcused Absence	Worked Hours	Leave Taken	Total Hours
Adams, Julie						✓			
Aguirre, Raymo...						✓			
Anderson, Jam...									
Arick, Michael						✓			
Babson, Mildred						✓			
Baker, Ginger									
Billings, Thomas						✓			
Boyd, Mary J									
Brooks, Bob							37:30		

1 Selected  
Previous Pay Period  
Go to widget  
Audits  
People Editor  
Rule Analysis  
Exceptions  
**Timecards**  
Schedules  
Requests  
Go to workspace

## Analyzing and Resolving Exceptions in Hourly Timecards

### Resolving Time Data discrepancies in the Hourly Timecard

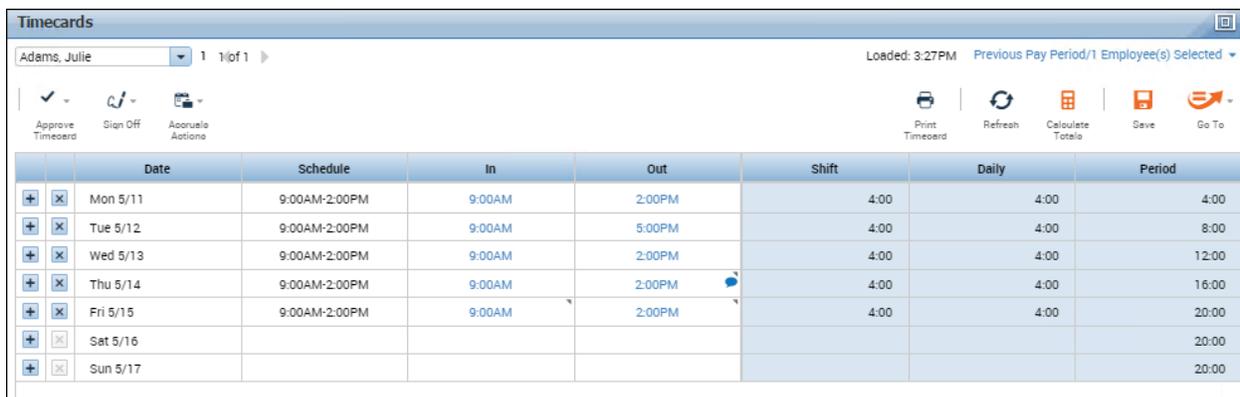
The hourly timecard view allows you to perform additional tasks for hourly employees, beyond resolving time data exceptions. In this topic, we will review:

- Saving time data changes in the hourly timecard view
- Transferring employees

### Saving Changes to Information in the Timecard View

#### Unsaved Data Indicators

Similar to the Exceptions widget, the hourly timecard view provides visual indicators to inform you when you have unsaved data. The Save icon turns orange when changes have been made to timecard information. If changes have been made that impact timecard totals, the Calculate Totals icon will also turn orange.



	Date	Schedule	In	Out	Shift	Daily	Period
+ X	Mon 5/11	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	4:00
+ X	Tue 5/12	9:00AM-2:00PM	9:00AM	5:00PM	4:00	4:00	8:00
+ X	Wed 5/13	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	12:00
+ X	Thu 5/14	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	16:00
+ X	Fri 5/15	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	20:00
+ X	Sat 5/16						20:00
+ X	Sun 5/17						20:00

#### Saving Changes

After you complete your edits, you must click Save to write those edits to the database. When you do, the visual indicators will disappear.

#### Saving Changes within a Timecard

1. Complete your edits within the timecard.
2. If you decide you no longer want the edits to be made, click **Refresh**.  
The data will return to the state before edits were made.
3. To save your edits, click **Save**.
4. If your data is not updated, click **Refresh**.

#### Refreshing Workforce Timekeeper Data

Clicking Refresh cancels unsaved edits and displays data as of the last save.

- To discard any changes, after clicking Refresh, click Yes.
- If you click Refresh, but want to save the changes, click No and save the data.

### Calculating Totals Before Saving Changes

In some cases, you may want to calculate the totals that were impacted by your edits before saving the data. To do this, perform these steps.

1. Complete the edits within the timecard.

2. Click **Calculate Totals**.
3. If you decide you do not want to save the edits after review the impacts, click **Refresh**.
4. If you decide to move forward with the edits, click **Save** and, if necessary, click **Refresh**.

## Transferring Employees

During the normal workday, all worked and non-worked hours are calculated using the employee's default work rule and charged to the employee's assigned labor account and job.

Employees are each assigned to a primary labor account, a default work rule, and possibly a primary job.

Employees are not limited to working where they have been assigned.

## Using the Transfer Field

Use the Transfer field in the timecard to transfer employee's time to a new labor account, work rule, or job. Click Search to display the Select Transfer dialog box.

Timecards							
Adams, Julie							Loaded:
<div style="display: flex; justify-content: space-between;"> <span>Approve Timecard</span> <span>Sign Off</span> <span>Account Actions</span> </div>							
	Date	Schedule	In	Out	Transfer	Shift	
+ X	Mon 5/11	9:00AM-2:00PM	9:00AM	2:00PM	://319//	4:00	
+ X	Tue 5/12	9:00AM-2:00PM	9:00AM	2:00PM	://319// Search...	4:00	
+ X	Wed 5/13	9:00AM-2:00PM	9:00AM	2:00PM		4:00	
+ X	Thu 5/14	9:00AM-2:00PM	9:00AM	2:00PM		4:00	
+ X	Fri 5/15	9:00AM-2:00PM	9:00AM	2:00PM		4:00	
+ X	Sat 5/16						
+ X	Sun 5/17						

### Transfer

Name Adams, Julie

Job

Labor Account //319//

Work Rule

Job Transfer
Labor Account
Work Rule

- Olsen 11/10/2008 - Forever

- + Asmb
- + Dist
- + FT
- PayMG
- + Srv

Cancel
Apply

## Transferring an Employee

1. Access a Genie and click **Refresh**.
2. Select an employee and access **GoTo > Timecards**.
3. Select a day you want to transfer hours to.
4. Click the **Transfer** cell in the row for the applicable date.
5. If the applicable job does not appear in the **Transfer** list, click **Search**.

6. In the **Job Transfer** tab of the **Transfer** dialog box, click **+** until you reach the applicable job.
7. Click **Apply**.
8. Click **Save**.

## Using the Transfer Field

Use the Transfer field in the timecard to transfer employee's time to a new labor account, work rule, or job. Click Search to display the Select Transfer dialog box.



### Note

- If employees regularly work in multiple location, they can be set up to automatically distribute their hours to multiple labor accounts, pay codes, and/or organizational jobs.
- In addition to searching for transfers, a short list of transfers can be displayed. By default, the list displays a user's most recent transfers, known as the Most Recent Used (MRU) list. However, some organizations can choose to limit the labor accounts and work rules that employees can transfer to. The MRU list can be replaced with an Easy Transfer list. To learn more about Easy Transfers, access content on KnowledgePass.

# Reviewing and Submitting Timecards

## Approving Employee Timecards

### Approving Employee Timecards

You need to validate that all employee timecards are ready for payroll processing and that your employees have applied their approvals. After the timecards are validated, you can apply your approval and check the results. If the approval is successful, Payroll personnel can then start preparing time data for payroll processing.

#### Approval Effects on Editing Capabilities for Managers

After a manager applies an approval to a specified time period for an employee, the ability of the manager to perform further edits depends on his or her access rights.

Check with your Workforce Timekeeper Application Administrator to determine whether you can edit employee timecards that you or another manager has approved.

#### Visual Indicators of Timecard Approval Status

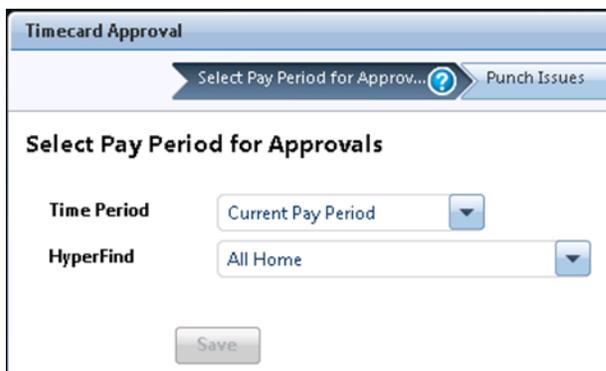
Workforce Timekeeper provides visual cues within employee timecards that represent approval statuses. The timecard is shaded various colors depending on where the timecard is within the approval process.

The following table identifies the various timecard shading colors and what they signify.

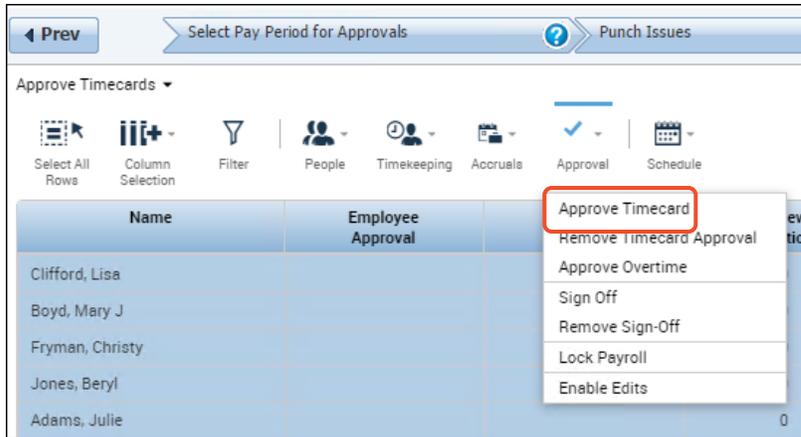
Timecard color	Status of timecard
Orange	Timecard has been approved by the employee only
Yellow	Timecard has been approved by the manager only
Green	Timecard has been approved by both employee and manager
Grey	Timecard has been signed off by either the employee, manager, or both

#### Approving Employee Timecards Using the Approval Wizard

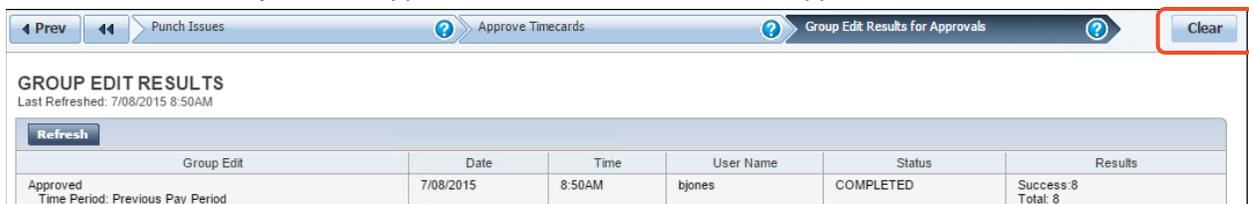
1. Access the **Timecard Approval** wizard.
2. Confirm or modify the values in the **Time Period** and **HyperFind** field. If you make any changes, click **Save**.



3. Click **Next**.
4. Review the **Exceptions** widget for any exceptions that have not been addressed. Correct the exceptions as necessary. Click **Next**.
5. Select one or more employees whose timecards you want to approve. Hint: If you are not viewing the applicable Genie, select the applicable Genie from the drop-down list.
6. Select **Approval > Approve Timecard**.



7. Click **Yes** on the pop-up message. Then click **Next**.
8. Review the results of your time approvals. To start a new timecard approval, click **Clear**.



9. Click **OK** on the pop-up message.

## Removing your Approval

After you apply an approval to one or more employee timecards, those employees can no longer edit their timecards for that time period. However, there might be circumstances when an employee needs to make further edits to a timecard after a manager has applied an approval.

Removing your approval from a timecard allows other managers—and possibly the employee—to edit time data for the dates from which you removed your approval.

If your organization chooses to implement this feature, you will be able to remove and re-apply approval as needed.

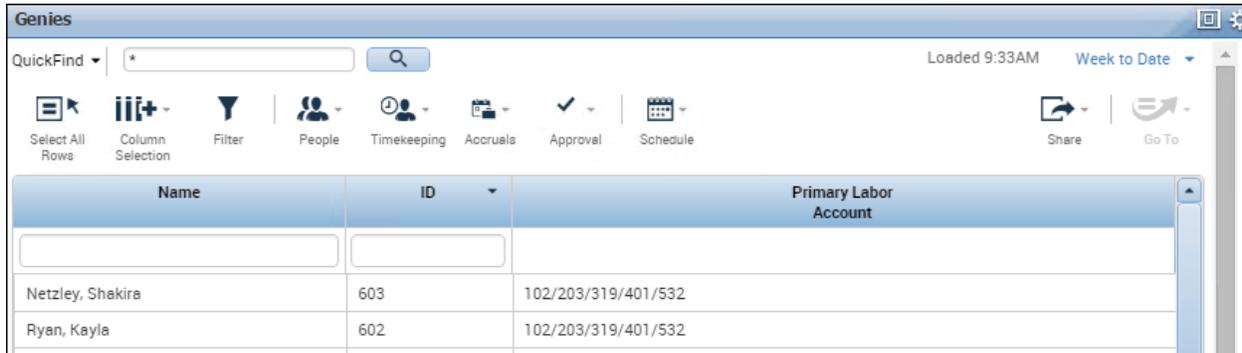
## Appendix

## Using the Workforce Timekeeper Interface

## Basic Navigation

### Searching for Employees Using the QuickFind Genie

The QuickFind Genie is a convenient tool you can use to search for a person or a set of people in the application.



The screenshot shows the 'Genies' application window. At the top, there is a 'QuickFind' search bar with a magnifying glass icon. Below the search bar is a toolbar with icons for 'Select All Rows', 'Column Selection', 'Filter', 'People', 'Timekeeping', 'Accruals', 'Approval', and 'Schedule'. On the right side of the toolbar, there are 'Share' and 'Go To' buttons. The main area displays a table with the following data:

Name	ID	Primary Labor Account
Netzley, Shakira	603	102/203/319/401/532
Ryan, Kayla	602	102/203/319/401/532

You can use the following methods to search for employees:

Search by employee's last name

Search by name or ID

Search by partial name or ID

You can also change the list of people that appear by selecting a different period from the Time period drop-down list.

### Searching by Employee's Last Name

1. In the **Name or ID** field, enter the employee's last name and click **Find**.

- For example, enter **Babson** and click **Find**.
- **QuickFind** returns the list of all employees whose names begin with the letters Babson.

### Searching by Name or ID

1. In the **Name or ID** field, enter the employee's ID number and click **Find**.

- For example, enter 601 and click **Find**.
- **QuickFind** returns the person with ID 601.

### Searching by Partial Name

If the employee you are looking for has a long name, or if you are unsure how to spell it, you can use the asterisk (\*) wild card character, which allows you to search using just the first letter or first few letters of the employee's name.

1. In the Name or ID field, enter the first few letters of the employee's name, followed by an asterisk (\*), and click Find.

- For example, type **ca\*** and click **Find**.
- QuickFind returns the list of all employees whose names begin with Ca.
  - Note that you can use the wild card character in the middle of a name. For example, if you don't know whether an employee's name is MacDonald or McDonald, you can enter **M\*Donald**, and QuickFind will return all employees whose names begin with M and end with Donald.

## Searching by partial number or ID

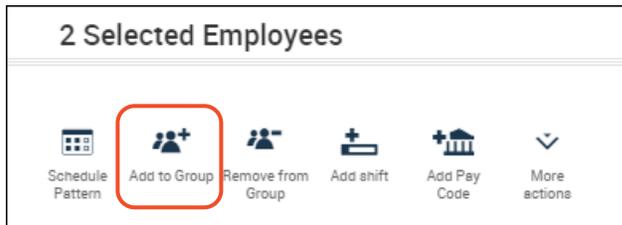
You can also search by partial ID by entering the first number or first few numbers, followed by the \* character in the Name or ID field. QuickFind returns all employees whose IDs begin with those numbers.

# Scheduling Staff for Specific Periods

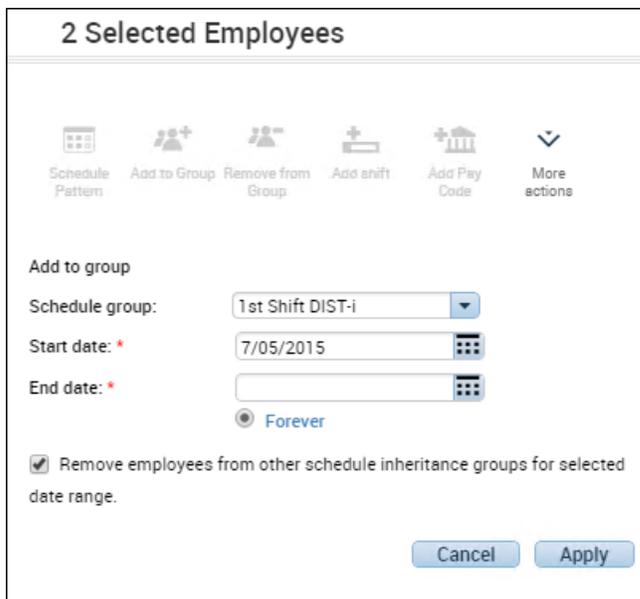
## Adding and Removing Employees from Schedule Groups

### Adding Employees to a Schedule Group

1. In the **Schedule Planner**, click **View > By Schedule Group**.
2. Using the Context Selector, select the applicable group and time period.
3. Select the **employees** you want to add.
4. With the **ctrl** button still pressed, right-click one of the selected names and select **Add to Group**.

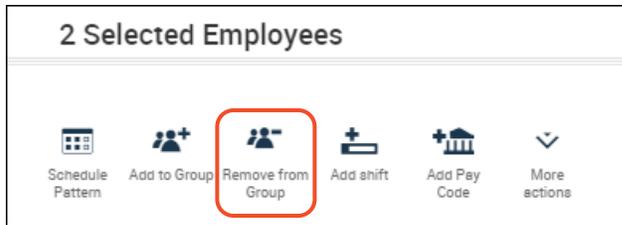


5. In the **Add to Group** dialog box, select a group from the **Schedule Group** drop-down list.
6. Enter or select a **Start Date** and an **End Date** for the schedule group assignment.
7. If the schedule group that you selected allows schedule inheritance, select the check box to remove the employees from their other schedule inheritance groups for the date range.
8. Click **Apply**.

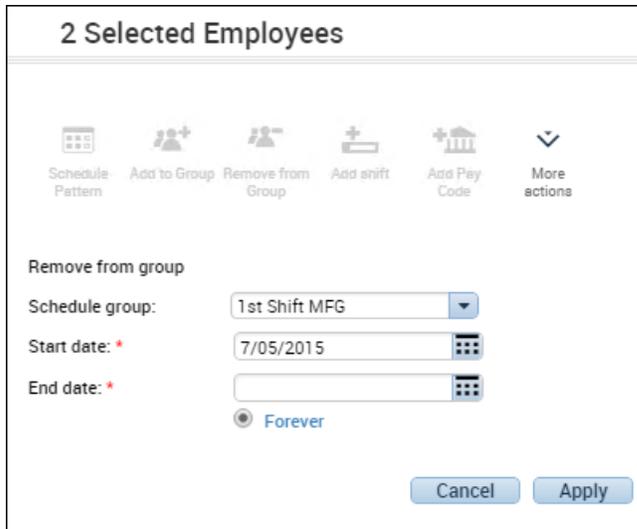


### Removing Employees from a Schedule Group

1. In the **Schedule Planner**, click **View > By Schedule Group**.
2. Using the Context Selector, select the applicable group and time period.
3. Select the **employees** you want to remove.
4. Select **Group > Remove from Group**.



5. In the **Remove from Group** dialog box, select the schedule group from the **Schedule Group** drop-down list.
6. Enter or select a **Start Date** and **End Date** for the schedule group assignment and then click **Apply**.



## Scheduling Staff to Meet Workload Requirements

### Managing Group Schedules

#### Using Schedule Inheritance in the By Group Tab

When an inheritance schedule group is assigned to employees and a group schedule is assigned to the schedule group, all members of the group inherit, or acquire, the assigned schedule.

Employees can be in multiple schedule groups but they should be associated with only one schedule inheritance group.

By Schedule Group		5/10 - 5/16			
Name	Sun 5/10	Mon 5/11	Tue 5/12	Wed 5/13	
<b>Ungrouped Employees</b>					
<b>1st Shift DIST -i</b>		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Johnson, Jean		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Sullivan, Gary		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
<b>2nd Shift MFG</b>					
Arick, Michael		3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	
<b>3rd Shift DIST -i</b>		11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
Metzler, Rita		11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
Radue, Brian		11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
<b>Day Office -i</b>		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
McKenna, Todd		9:00AM - 2:00PM	8:00AM - 4:30PM	8:00AM - 4:30PM	

#### Modifying a Shift within a Schedule Group

1. Access the **Schedule Planner**.
2. If not viewing by group already, from the **View** drop-down list, select **By Schedule Group**.
3. Click the **Context Selector** to select the applicable timeframe and employee group.
4. Locate the applicable **Schedule Group** within the grid, and right-click the applicable date cell.
5. Click **Edit**.
6. Verify that the **Start Date** is correct.
7. In the **Start Time** field, enter the start time of the shift.
8. In the **End Time** field, enter the end time for the shift.
9. In the **End Date** field, enter the date that the shift should end.
10. Click **Apply**.
11. Click **Save**.

By Schedule Group		5/31 - 6/06					
Name	Sun 5/31	Mon 6/01	Tue 6/02	Wed 6/03	Thu 6/04	Fri 6/05	Sat 6/06
<b>3rd Shift DIST -i</b>		11:00PM - 7:30AM	9:00PM - 6:00AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
Metzler, Rita		11:00PM - 7:30AM	9:00PM - 6:00AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
Radue, Brian		11:00PM - 7:30AM	9:00PM - 6:00AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	

## Ad hoc Shifts

If you manually edit a shift for an employee that is part of a schedule group, the shift becomes an ad hoc shift. Therefore, its link to the inherited schedule is lost. The shift's association with the group scheduled shift cannot be restored, even if the modified shift is deleted.

The following illustration shows the gold-colored visual indicator that appears in the cell with an ad hoc shift.

By Schedule Group	5/10 - 5/16					
Name	Sun 5/10	Mon 5/11	Tue 5/12	Wed 5/13	Thu 5/14	Fri 5/15
Metzler, Rita		8:00AM - 5:00PM	8:00AM - 5:00PM	8:00AM - 5:00PM	2:00PM - 10:00PM	2:00PM - 10:00PM
		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM

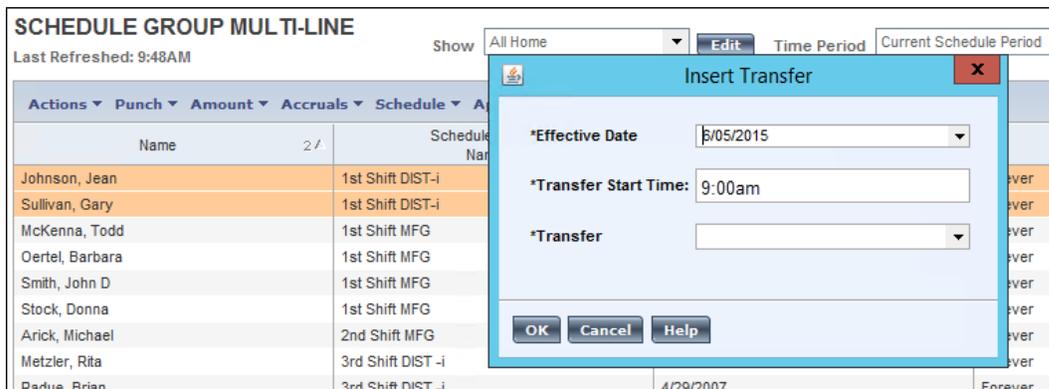
## Making Group Edits Using Genies

From any Workforce Timekeeper Genie, you can make the following group edits:

- Add or replace a shift
- Insert transfer
- Append a pay code
- Add or delete a pattern
- Lock/unlock days
- Add/remove from group
- Pay From Schedule

## Performing a Group Edit from a Genie

1. From the **Related Items** pane, select the **Schedule Group Multi-line Genie**.
2. Using the **Context Selector**, select the applicable group and timeframe.
3. Sort the **Genie by Schedule Group Name**.
4. Select all employees in the applicable schedule group.
5. Select **Schedule > Insert Transfer**.



**SCHEDULE GROUP MULTI-LINE**

Last Refreshed: 9:48AM

Actions ▾ Punch ▾ Amount ▾ Accruals ▾ Schedule ▾ A

Name	Schedule Group Name
Johnson, Jean	1st Shift DIST-i
Sullivan, Gary	1st Shift DIST-i
McKenna, Todd	1st Shift MFG
Oertel, Barbara	1st Shift MFG
Smith, John D	1st Shift MFG
Stock, Donna	1st Shift MFG
Arick, Michael	2nd Shift MFG
Metzler, Rita	3rd Shift DIST -i
Radue, Brian	3rd Shift DIST -i

**Insert Transfer**

\*Effective Date: 5/05/2015

\*Transfer Start Time: 9:00am

\*Transfer: [Dropdown]

OK Cancel Help

6. In the **Effective Date** field, enter the effective date of the transfer.
7. In the **Transfer Start Time** field, enter the applicable time.
8. In the **Transfer** field, click **Search**.
9. In the **Labor Account** area, select the applicable option.
10. Select the applicable option.
11. Click **OK** twice.
12. From the **Related Items** pane, select **Group Edit Results**. Review the results of the **Schedule Transfer Inserted** group edit.

**GROUP EDIT RESULTS**  
Last Refreshed: 6/05/2015 9:51AM

**Refresh**

Group Edit	Date	Time	User Name	Status	Results
Schedule Transfer Inserted Effective Date: 6/05/2015 Transfer Begin Time: 9:00AM Job Transfer: None Labor Account Transfer: //1402/ Work Rule Transfer: None Comments: None	6/05/2015	9:51AM	bjones	COMPLETED	Success: 2 Total: 2

13. Access the **Schedule Planner** and confirm that you are viewing **By Group**.
14. From the **Time Period** drop-down list, select the timeframe you originally select for the transfer.
15. Locate the selected group and review your results.
16. If necessary, click **Refresh**.

Quick Actions | View | Column Selection | Viability Filter | Select all | Gantt View | Tools | Load group | Refresh | View Comments | Share | Save | Go To

**By Schedule Group** 5/31 - 6/06

Name	Sun 5/31	Mon 6/01	Tue 6/02	Wed 6/03	Thu 6/04	Fri 6/05	Sat 6/06
<b>1st Shift DIST-i</b>		9:00AM - 2:00PM					
Johnson, Jean		9:00AM - 2:00PM					
Sullivan, Gary		9:00AM - 2:00PM					

**Caution**  
Inheritance functionality does not apply when making group schedule edits in a Genie.



**Note**

The Insert Transfer functionality within a Genie allows you to move shifts for employees selected in the Genie. The application inserts the transfer into all the shift segments that contain the transfer start time and that are scheduled on the Effective Date for the transfer.

An example of when this might be useful is when you need to move all employees to a different work area due to a temporary building closure.

For shifts that have multiple segments, the Insert Transfer function inserts the transfer into every shift segment. If this function is not the results you want, then do not use the Insert Transfer function on these types of shifts.

## Paying Employees from Schedules

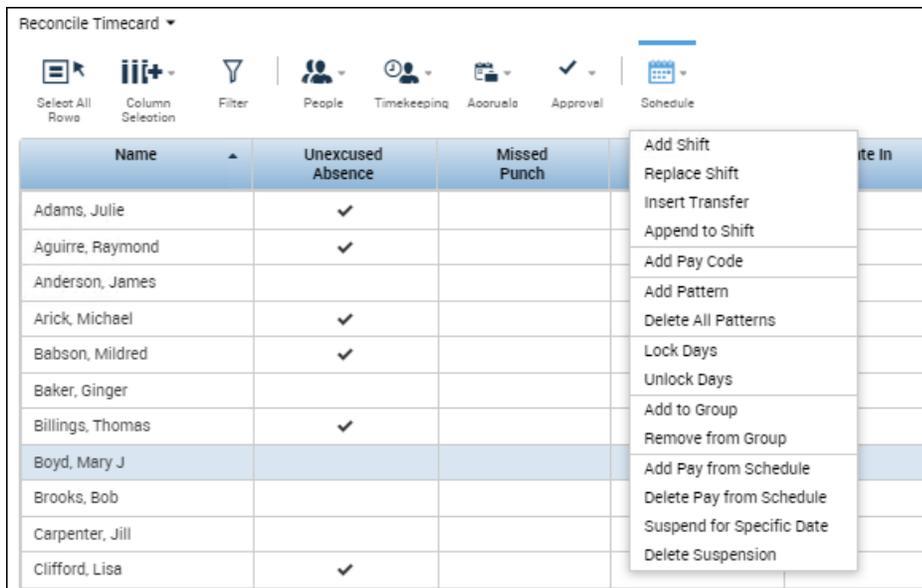
### Using the Pay from Schedule Feature

Workforce Timekeeper can be configured to pre-populate employee timecards automatically with the scheduled hours based on their schedules. Paying employees from their schedules lets you pre-populate their timecards with scheduling data, letting you pay employees the exact amount of their scheduled worked hours.

This functionality is useful for employees who do not need to punch in every day but track their hours on an exception basis.

### When to use Pay from Schedule

Employee Type	Pay From Schedule use
Project or salaried	Pre-populate timecards with scheduled hours on a regular basis so that timecard edits are only needed for exceptions to scheduled times.
Hourly	Pre-populate timecards with scheduled hours on a temporary basis when needed, for example, if an employee temporarily won't have access to record worked time, or payroll needs to be processed before the end of the pay period because of a holiday.



The screenshot shows the 'Reconcile Timecard' interface. At the top, there are several icons for actions: Select All Rows, Column Selection, Filter, People, Timekeeping, Absence, Approval, and Schedule. Below these icons is a table with columns for Name, Unexcused Absence, Missed Punch, and Date In. The table lists several employees, including Julie Adams, Raymond Aguirre, James Anderson, Michael Arick, Mildred Babson, Ginger Baker, Thomas Billings, Mary J Boyd, Bob Brooks, Jill Carpenter, and Lisa Clifford. A context menu is open over the 'Schedule' column, showing options such as Add Shift, Replace Shift, Insert Transfer, Append to Shift, Add Pay Code, Add Pattern, Delete All Patterns, Lock Days, Unlock Days, Add to Group, Remove from Group, Add Pay from Schedule, Delete Pay from Schedule, Suspend for Specific Date, and Delete Suspension.

### Paying from Schedule

1. Select a Genie from the **Genie** widget.
2. Using the **Context Selector**, select the applicable group and time period.
3. Click **Apply**.
4. Select an employee.
5. From the menu options, select **Schedule > Add Pay From Schedule**.

### Add Pay From Schedule

Effective Start Date:\*  Clear

Effective End Date:\*  Clear

Comments (0) [Add Comment](#)

6. In the **Effective Start Date** field, select the applicable date.
7. In the **Effective End Date** field, select the applicable date.
8. Click **Apply**.
9. Access the **Group Edit Results** page and review the information in the **Pay From Schedule Added** transaction to ensure that the edit was successfully processed.
10. Navigate back to the **Genie** widget.
11. Select the applicable employee, access **GoTo Control > Employee Timecard**.
12. Review the dates and validate that the edits were made.
13. If necessary, click **Refresh**.

Adams, Julie Loaded: 9:58AM Current Pay Period/1 Employee(s) Selected

✓ Approve Timecard
✗ Sign Off
📅 Accruals Actions

🖨️ Print Timecard
🔄 Refresh
📊 Calculate Totals
💾 Save
➡️ Go To

	Date	Schedule	In	Out	Transfer	Pay Code	Amount	Shift	Daily	Period
+	✗	Sun 5/31								
+	✗	Mon 6/01	9:00AM	2:00PM				4:00	4:00	4:00
+	✗	Tue 6/02	9:00AM	2:00PM				4:00	4:00	8:00
+	✗	Wed 6/03	9:00AM	2:00PM				4:00	4:00	12:00
+	✗	Thu 6/04	9:00AM	2:00PM				4:00	4:00	16:00
+	✗	Fri 6/05	9:00AM	2:00PM				4:00	4:00	20:00
+	✗	Sat 6/06								20:00
+	✗	Sun 6/07								20:00

## Scheduling Labor and Work Rule transfers

### Scheduling Transfers and Off Shifts

#### About Shift Transfers

During a normal workday, Workforce Timekeeper uses the default work rule to calculate employee worked and non-worked hours, and then charges the hours to the assigned primary labor accounts and jobs.

On occasion, you might need employees to perform other jobs or work in other cost centers for which they are qualified. In this situation, you can schedule a transfer to have employee hours calculated differently.

You can schedule a transfer for:

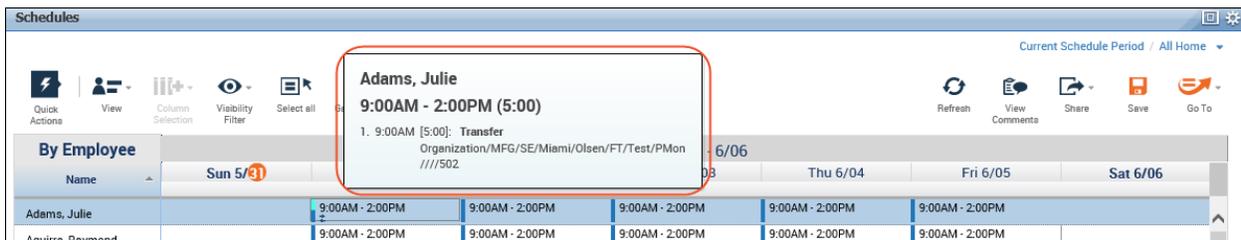
- An entire shift
- A portion of a shift

#### Transfer Types

Transfer type	Description
Labor account	Transfers shift hours to an alternate labor account in your accounting structure. You can transfer hours to one or more labor levels in a labor account.
Job	Transfers hours to an alternate job in your organization. Each job has a specific path in your organizational map; therefore, Workforce Timekeeper specifies the entire job path when you perform a job transfer, ensuring that you track the transferred hours to a valid job.
Work rule	Transfers hours to an alternate work rule so that those hours are calculated differently. Work rules identify details such as how punches round, what types of overtime an employee can earn, and which pay codes track what types of hours.

#### Sample Shift Transfer Tool Tip

The following illustration shows one type of transfer indicator (x), and the tool tip describing the transfer.



The screenshot shows the 'Schedules' interface with a grid of employee shifts. A red box highlights a tool tip for 'Adams, Julie' on 'Sun 5/31'. The tool tip displays the following information:

- Adams, Julie**
- 9:00AM - 2:00PM (5:00)**
- 1. 9:00AM [5:00]: Transfer
- Organization/MFG/SE/Miami/Olsen/FT/Test/PMon
- ///502

The background grid shows shifts for Adams, Julie and Aquitre, Raymond across days from Sun 5/31 to Sat 6/06. The shift times are generally 9:00AM - 2:00PM.



#### Tip

You can hold your mouse over a shift transfer entry in the Schedule Editor to display a tool tip with the complete transfer information.

## Transfer Indicators in the Schedule Planner

The Schedule Editor displays visual cues next to the shift times or shift label to identify transfers.

By Employee Name	Sun 6/14						Mon 6/15					
	4a	8a	12p	4p	8p	12a	4a	8a	12p	4p	8p	12a
	Adams, Julie									9:00A		
Aguirre, Raymond									9:00A			
Anderson, James									9:00AM -			

## Transfer Dialog Box Sample

The Transfer dialog box is a tool that lets you schedule hours to other labor accounts, jobs, or work rules.

### Transfer

Name	Adams, Julie
Job	Olsen/PayMG
Labor Account	
Work Rule	

Job Transfer

Labor Account

Work Rule

-

Olsen 11/10/2008 - Forever

- +

Asmb
- +

Dist
- +

FT
- PayMG
- +

Srv

Cancel

Apply

## Scheduling a Transfer

1. In the **Schedule Planner**, locate the employee's row and right-click the cell in the row under that date where you want to schedule a transfer.
2. Select **Add Shift**.
3. Enter **Start Time** and **End Time** for the transfer.
4. Depending on the type of transfer, click within the **Job Transfer**, **Labor Level Transfer**, or **Work Rule Transfer** cells.
5. From the drop-down list, select the applicable transfer location. If the item you want does not appear within the list, click **Search**.
6. Select the applicable tab, and then use the tree (**Job Transfer**), drop-down lists (**Labor Account**), or lists (**Work Rule**) to make your selections.
7. Click **Apply**.

### Transfer

Name: Baker, Ginger

Job:

Labor Account:

Work Rule:

Job Transfer
Labor Account
Work Rule

[-] Olsen 11/10/2008 - Forever

- Asmb
- Dist
- FT
- PayMG
- Srv

8. Confirm that the date in the **End Date** field is correct. If the shift segment crosses a day divide, change the shift's end date to the following day.
9. In the **Repeat this shift for** field, enter the number of consecutive days to repeat the transfer.

### Add Shift

Assigned to: Baker, Ginger

Shift Details: 10:00am-1:00pm(3:00h)

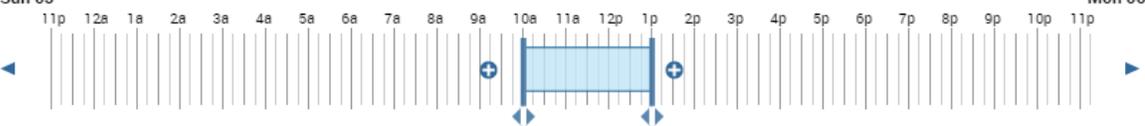
Primary Job: ...anization/MFG/SE/Miami/Olsen/Asmb/FAsmb/AsbBO

Insert Template ▾

Shift Label:

Repeat this shift for:  days

Sun 05 Mon 06



	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="checkbox"/>	7/06/2015	Transfer	10:00am	1:00pm	7/06/2015	3:00		///404/	

Comments (0) [Add Comment](#)

10. Click **Apply** and then click **Save**.

# Monitoring Timecards to Facilitate Payroll Processing

## Reviewing Notifications of Time Data

### Using the Reconcile Timecard Genie to View Exceptions

The Reconcile Timecard Genie displays at-a-glance, summarized information about scheduled and worked time differences for employees.

- Black check marks represent unresolved exceptions
- After exceptions are marked as reviewed, they are removed from Reconcile timecard

Reconcile Timecard Loaded 9:56AM Current Pay Period / All Home

Select All Rows
Column Selection
Filter
People
Timekeeping
Accruals
Approval
Schedule
Refresh
Share
Go To

Name	Unexcused Absence	Missed Punch	Early In	Late In	Early Out	Late Out	Overtime	Unsched Hours
Adams, Julie	✓							
Aguirre, Raymo...	✓							
Anderson, Jam...								
Arick, Michael								
Babson, Mildred	✓							
Baker, Ginger								
Billings, Thomas	✓							
Boyd, Mary J								
Brooks, Bob								
Carpenter, Jill								
Clifford, Lisa								
Crowsoft, Mich...								
<b>44</b>							<b>0</b>	



## Resolving Exceptions in the Exceptions Widget

---

### Justifying an Employee's Missing Time

Missing time is any instance of time that employees have missed when they were scheduled to work. In Europe, many organizations need to ensure that employees are working a target number of hours per day, week, month, or year. To help European organizations comply with labor laws that govern target hours, missing time exceptions can be automatically resolved with paid or unpaid duration pay codes.

To understand how this process works, imagine that your organization auto-resolves missing time exceptions. Your employee left work two hours early last Tuesday. Here are the steps that must be followed by both you and your employee to accurately account for missed time.

### Justifying Missed Time

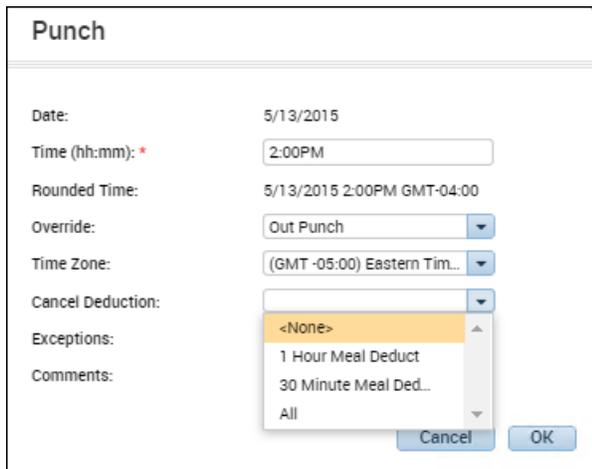
2. The employee reviews the timecard. In the timecard, the employee must justify any exception that has a Missing Time pay code. The employee selects the Out punch, selects Punch > Justify Exception. The employee selects a justification from the list and submits the timecard for manager approval.
3. As the manager, when you review the Summary page in the Exceptions widget, this employee appears with an Early Out Missing Time exception.
4. You can review the employee's reason for the missing time, and either confirm the justification, change to another justification, or use a combination of justifications.
5. You then mark the exception as reviewed and approve the time data.

## Canceling a Meal Deduction

An automatic meal or break deduction is a length of time defined in an employee's work rule that is automatically deducted from shift hours when that employee works a specific length of time.

If, for any reason, the automatic deduction needs to be canceled, you can perform the task by editing the punch data.

This task is performed in the Edit Punch dialog box, which is accessible from the employee's timecard. You select the applicable type of deduction from the Cancel deduction drop-down list.



Example: An employee is scheduled to work from 8 A.M. to 5 P.M. with a lunch break from 12 P.M. to 1 P.M. The hour is automatically deducted from the employee's shift total; 8 hours instead of 9 hours. If the automatic deduction needs to be canceled, you can perform that task by editing the punch data.

### Paying an Employee for Working through a Meal

1. Access **Reconcile Timecard**.
2. Using the **Context Selector**, select the applicable time period and group of employees.
3. Access an employee's timecard.
4. Right-click the applicable punch and click **Edit**.
5. From the **Cancel Deduction** drop-down list, select the applicable meal deduction.
6. Click **OK**.
7. Click **Save**.

#### Recommended Practice

Add a comment to the edited punch to document the reason for the edit.

## Analyzing and Resolving Differences in Project Timecards

### Resolving Time Data Discrepancies in the Project Timecard View

#### Entering Worked Time as Durations

Employees using project timecards track their worked hours by entering amounts of time spent on different projects or worked in different areas. The Hours Worked pay code identifies worked hours in a project timecard. This pay code is referred to as a duration.

A duration represents a block of worked time for which the employee's pay rule determines how to allocate time. A duration is simply a number of worked hours that require processing to determine how to pay the employee.

You use pay codes to enter durations into a timecard. Although you enter durations the same way you enter pay codes, Workforce Timekeeper calculates durations differently than pay code amounts. The application applies the appropriate pay rules to durations; it does not apply pay rules to pay code amounts. You can enter durations up to 999:59 hours; however, you cannot enter negative durations.

#### Resolving Issues with Worked Hours in Project Timecards

Employees sometimes need to adjust their worked hour amounts. For example, an employee might not complete time entries because that employee did not report to work as scheduled, or left early because of a family emergency. You might need to complete an employee's time entries and apply an approval to that employee's timecard before submitting the timecard for payroll processing.

#### Visual Cues for Missing Durations

Project timecards track hours for employees who enter spans of time instead of in-punches and out punch. If your organization uses the basic scheduling feature in Workforce Timekeeper, then phantom data might appear in the timecard. In that case, employees only need to apply exceptions to their hours.

The following illustration shows a sample timecard for a project-based employee with an Hours Worked entry missing on Monday, the second week of the pay period, as indicated by the red line within the date cell and by the total number of hours being reduced by eight compared to the previous week. This entry is called an unexcused absence exception.

Frymen, Christy		28 1 of 1		Loaded: 3:03PM Previous Pay Period / Employee(s) Selected						
Pay Code	Transfer	Mon 4/27	Tue 4/28	Wed 4/29	Thu 4/30	Fri 5/01	Sat 5/02	Sun 5/03	Total	
Hours Worked		8:00	8:00	8:00	8:00	8:00			40:00	
<Enter Pay Code>										
Schedule		9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM				
Daily Total		8:00	8:00	8:00	8:00	8:00			40:00	
Pay Code	Transfer	Mon 5/04	Tue 5/05	Wed 5/06	Thu 5/07	Fri 5/08	Sat 5/09	Sun 5/10	Total	
Hours Worked			8:00	8:00	8:00	8:00			32:00	
<Enter Pay Code>										
Schedule		9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM				
Daily Total		8:00	8:00	8:00	8:00	8:00			32:00	

#### Adding Non-Worked Time to Project Timecards

Most organizations have a variety of pay codes, such as holiday, vacation, and bereavement leave, that let employees track non-worked hours in the appropriate category.

#### Adding Non-Worked Time to a Project Timecard

1. Select an employee and access **GoTo Control > Employee Timecard**.
2. Use the **Context Selector** to select the applicable timeframe.
3. To add a new row, click the **Pay Code** cell in an empty row to display the available pay code options.
4. From the **Pay Code** drop-down list, select the applicable non-worked time pay code, for example, **Vacation**.

5. Click the **Amount** cell and enter the applicable amount of hours.
6. Right-click the pay code amount to add a comment, like **Approved**.
7. Click **Save**.