



## **Workforce Timekeeper 8**

***A Manual for Timekeepers & Managers***





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## Using the Workforce Timekeeper Interface



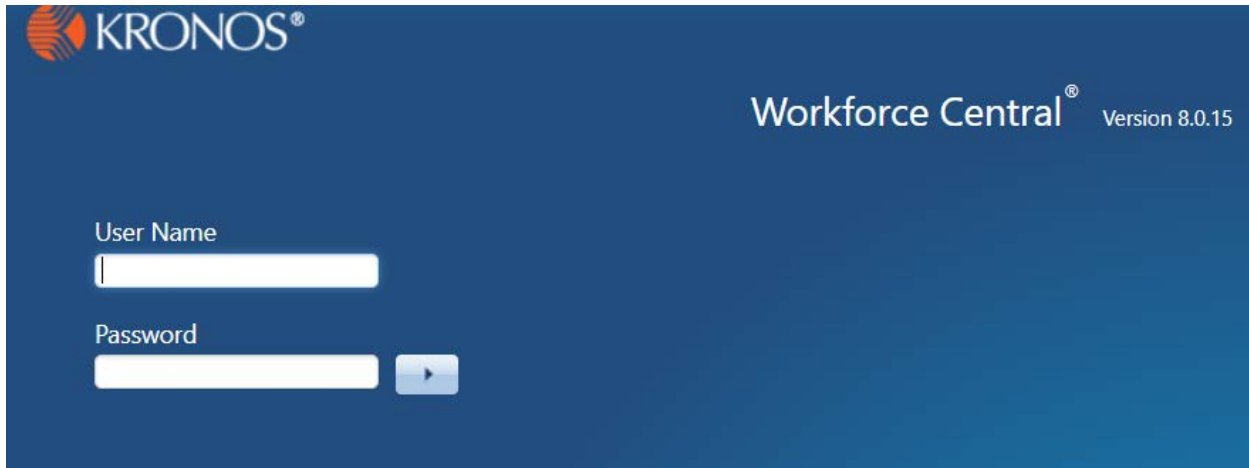
## Basic Navigation

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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 the Kronos Workforce Central Uniform Resource Locator (URL) in your internet browser. Then enter a user name and password to log in.



### Note

Kronos Workforce Central URL:

#### 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.



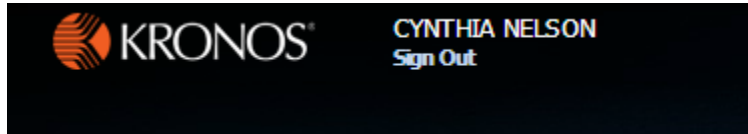
## Signing Out

### 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.

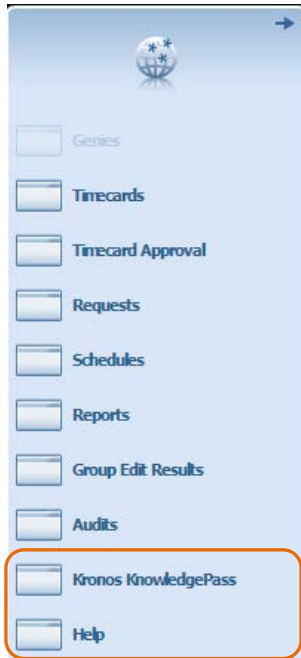


## Accessing Support in the Application

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.

## Using Online Help:

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

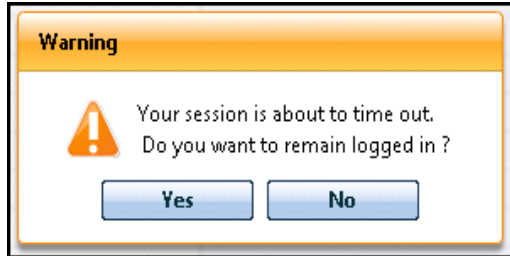
- Use the **Contents** tab to scan through the table of contents for the applications(s) in the suite that you are using.
- Use the **Search** tab to search for a specific topic of interest.
- If desired, click **Maximize** to gain more space on the screen. Click **Restore Down** to return the widget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

The Inactivity Timeout warning will appear roughly after 30 minutes of inactivity.

### 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.

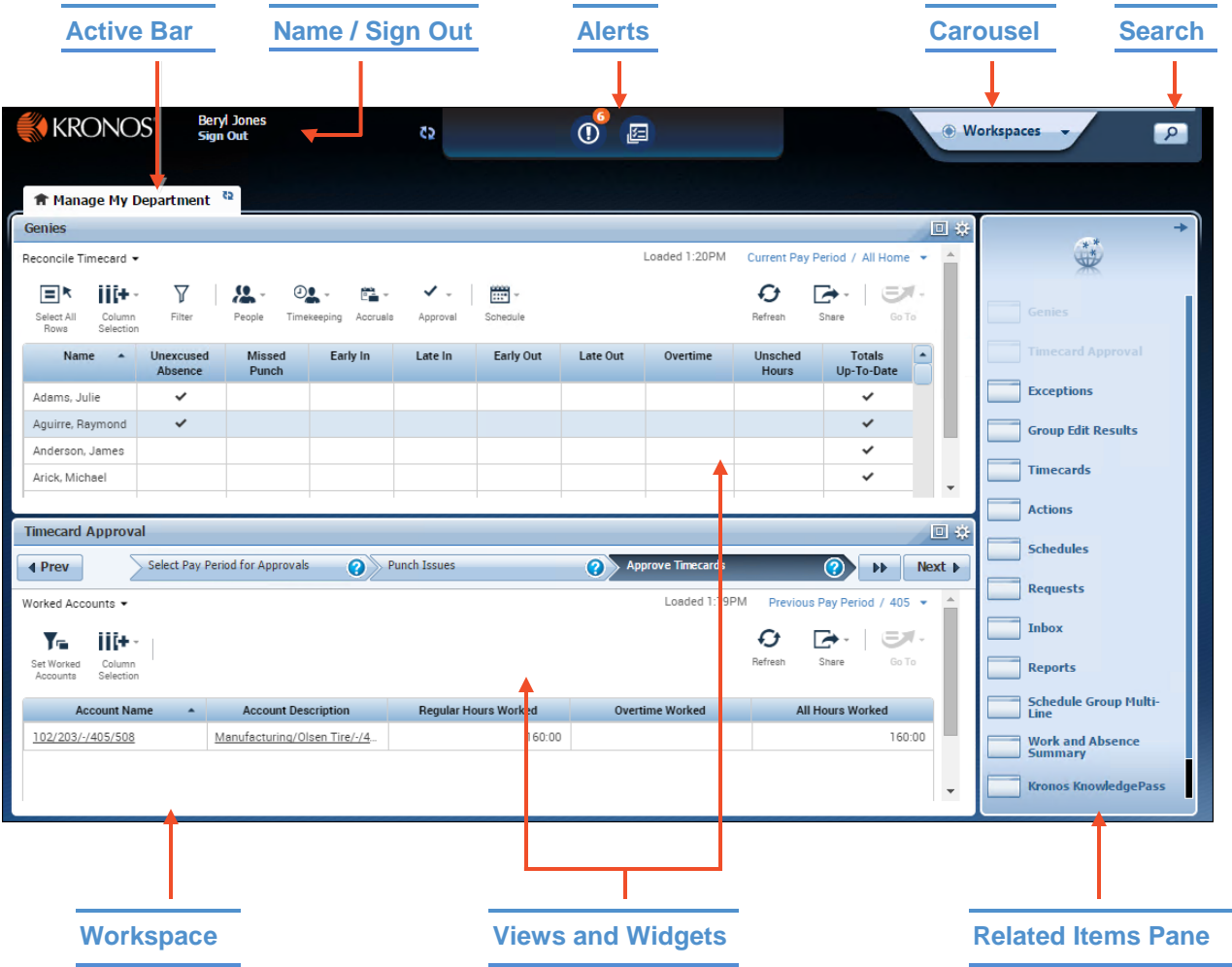


Using Your Navigator

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 your access. 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.

### Contextual Callouts

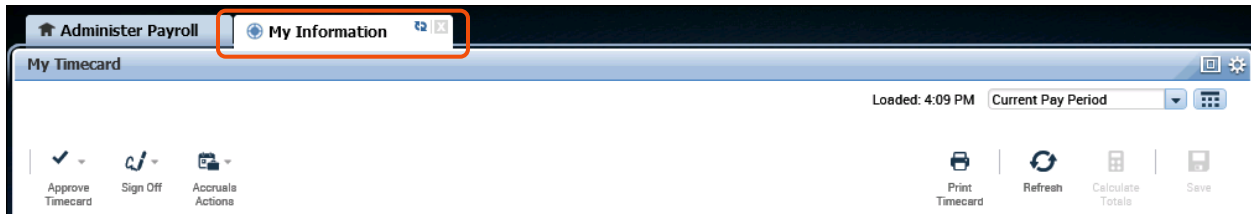
Right-click a cell within a widget; in many cases, this opens a callout with detailed information and icons for any actions you are allowed to perform on that cell.

### Using the GoTo Control

Your navigator is configured for you to be able to perform further actions on the entries in a widget. Using the GoTo control, you may 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.

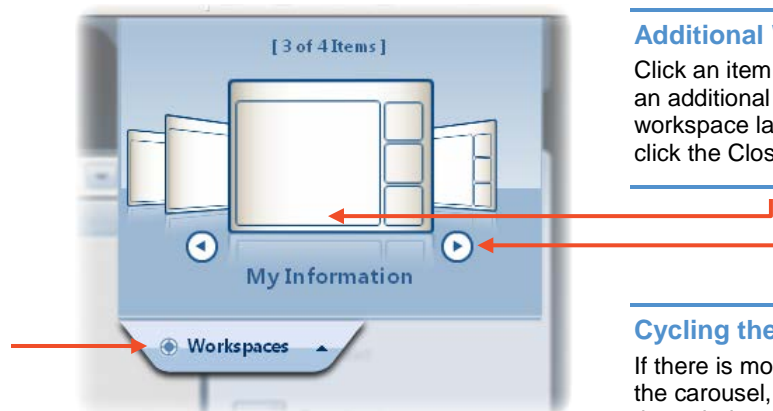
### Opening Workspaces

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



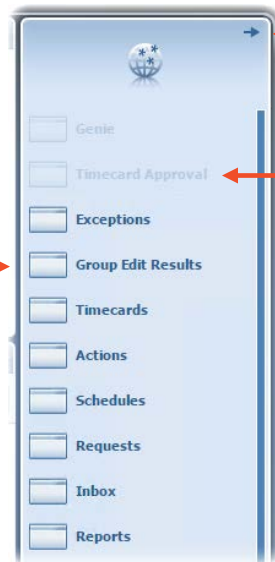
## Opening Widgets

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

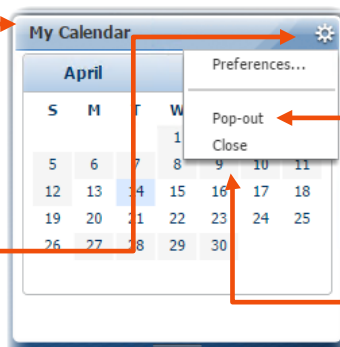
There are several ways to adjust the view or preferences of a widget to better suit your needs while you work through tasks.

### Title Bar

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

### 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.)



### Pop-out Option

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

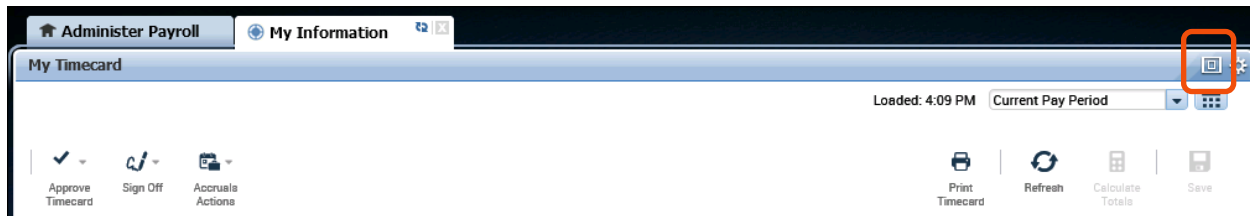
### Close Option

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.



## 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

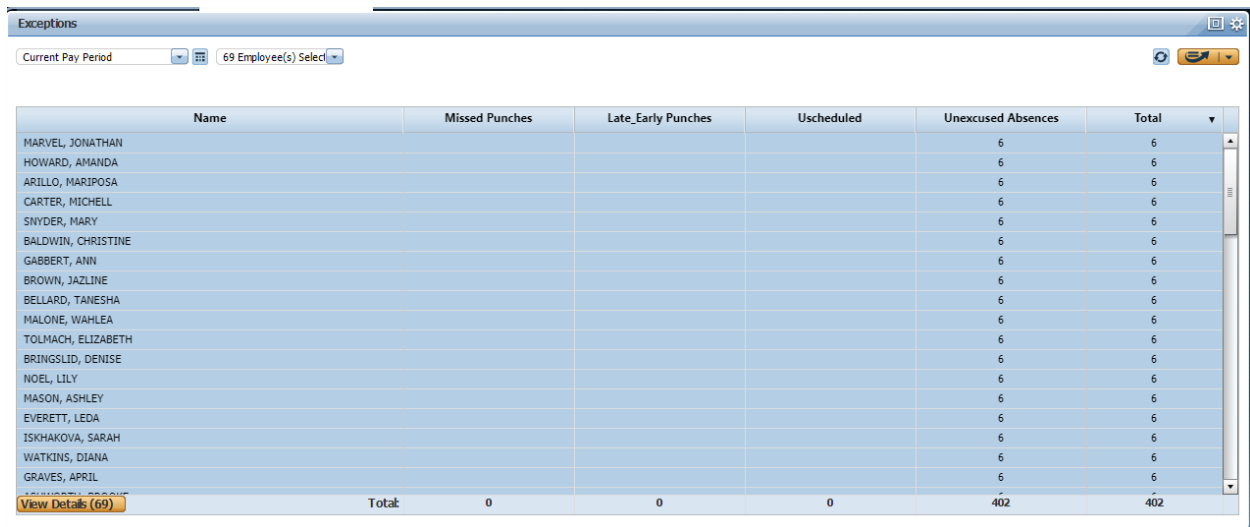
#### Reviewing Exceptions in the Exceptions Widget

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. This is a view-only mode. No tasks can be performed in this view.



Name	Missed Punches	Late_Early Punches	Unscheduled	Unexcused Absences	Total
MARVEL, JONATHAN				6	6
HOWARD, AMANDA				6	6
ARILLO, MARIPOSA				6	6
CARTER, MICHELL				6	6
SNYDER, MARY				6	6
BALDWIN, CHRISTINE				6	6
GABBERT, ANN				6	6
BROWN, JAZLINE				6	6
BELLARD, TANESHA				6	6
MALONE, WAHLEA				6	6
TOLMACH, ELIZABETH				6	6
BRINGSLID, DENISE				6	6
NOEL, LILY				6	6
MASON, ASHLEY				6	6
EVERETT, LEDA				6	6
ISKHAKOVA, SARAH				6	6
WATKINS, DIANA				6	6
GRAVES, APRIL				6	6
<b>Total</b>	0	0	0	402	402

#### 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
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 Timecards

In Workforce Timekeeper, you can access employee timecards in a central location, using the Timecard widget. You can review and address exceptions in from the widget.

### Timecard View

The timecard is another tool for managing employee time data for employees. 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.

Below is a view of a timecard.



Schedule	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
	Wed 2/28											
	Thu 3/01			8:24AM		4:30PM				7.5	7.5	7.5
	Fri 3/02			8:25AM		4:30PM				7.5	7.5	15.0
	Sat 3/03											15.0
	Sun 3/04											15.0
	Mon 3/05											15.0
	Tue 3/06											15.0
	Wed 3/07											15.0

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

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 view of a timecard with several time data exceptions and a comments indicator.

Timecards

DAVIDSON, WILLISHA

15 of 75

125949

Loaded: 3:28 PM

3/01/2018 - 3/15/2018, S...

75 Employee(s) Selected

✓

Approve Timecard

⌵

Accruals Actions

Print Timecard

Refresh

Calculate Totals

Save

Go To

	Schedule	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
⌵		Wed 2/28											
⌵		Thu 3/01	12 Personal...	7.5		////123617/						7.5	7.5
⌵	8:00AM-4:0...	Fri 3/02			8:27AM		4:00PM				7.5	7.5	15.0
⌵		Sat 3/03											15.0
⌵		Sun 3/04											15.0
⌵	8:00AM-4:0...	Mon 3/05											15.0
⌵	8:00AM-4:0...	Tue 3/06											15.0

Totals

Accruals

Historical Corrections

Audits

All

All

Location	Job	Account	Pay Code	Amount
		711248/TF&CHFRM/6270/123617/MPBUNCHF	12 Personal Business	7.5



## 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. 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.

Pay Period Close ▾ Loaded 10:49AM Previous Pay Period ▾ All Home ▾ Edit

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	Expected PP Hours	Pending Amount
Smith, Jack C		1	Fryman, Christy		✓		40:00		40:00	40:00	
Carpenter, Jill		1	Fryman, Christy		✓		16:00		16:00	40:00	
Boyd, Mary J		1	Fryman, Christy							0:00	
Crowsoft, Mich...		1	Fryman, Christy							0:00	
Sullivan, Gary		1	Fryman, Christy				90:00		90:00	40:00	
Tedder, Owen		1	Fryman, Christy				40:00		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.



Pay Period Close ▾ Loaded 10:53AM Previous Pay Period ▾ All Home ▾ Edit

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	Expected PP Hours	Pending I Amo
johnson											
Johnson, Emily		1	Fryman, Christy							40:00	
Johnson, Jean		1	Fryman, Christy				12:00	8:00	20:00	40:00	

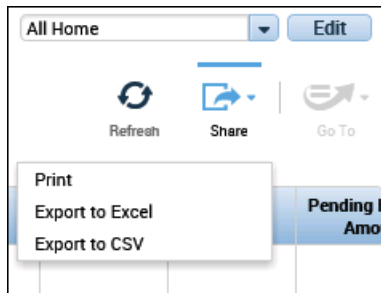


## Note

- You must click Refresh to ensure that you are viewing the most recent changes made to employee and application data.
- The Last Refreshed time (labeled “Loaded”) at the left of the context selector in the upper-right 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.

- Navigate to the **QuickFind Genie**.
- With the \* in the **Name or ID** field, click the **magnifying glass** to display all employees that you have access to.
- In the **Name or ID** field, enter the last name or first 3 letters or a last name with the \* after your entry.
- Click the **magnifying glass** or press **Enter**.
- If applicable, from the **Time Period** drop-down list, select the applicable timeframe.
- 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.



# Scheduling Staff for Specific Periods



## Assigning Base Schedules

### The Schedule Planner Widget

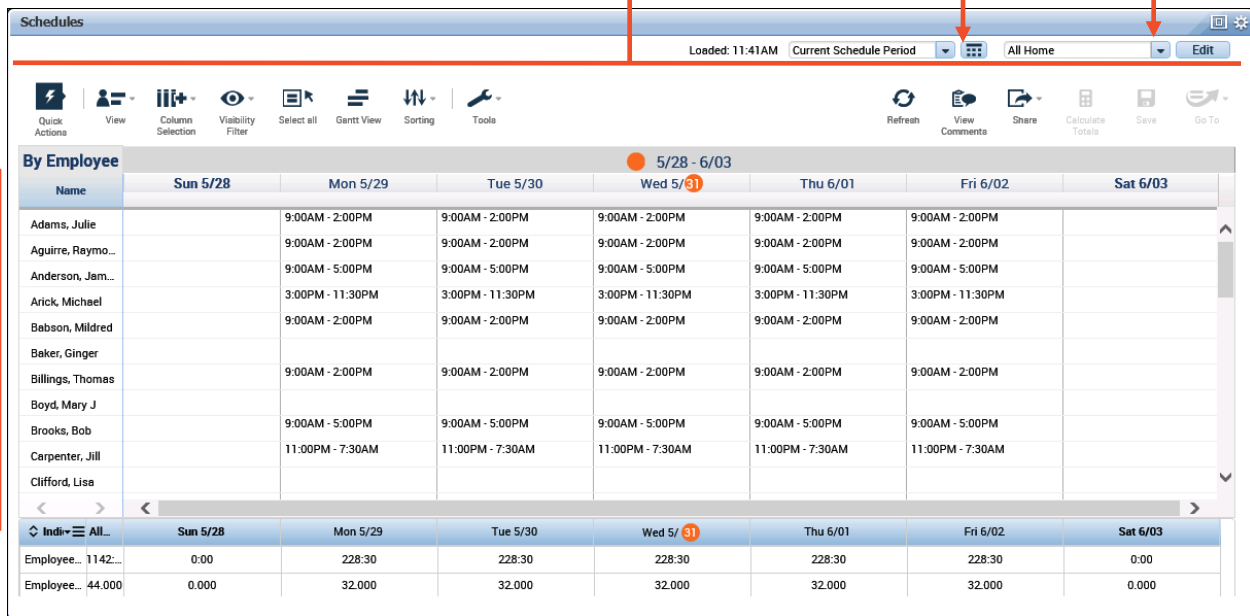
Workforce Timekeeper includes Schedule Planner, a powerful scheduling tool that helps you schedule worked and non-worked hours. The Schedule Planner presents a timeline view of employee schedules for a defined time period.

#### Tool bar

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

#### Context Selectors

Set options for the time period and group of employees.



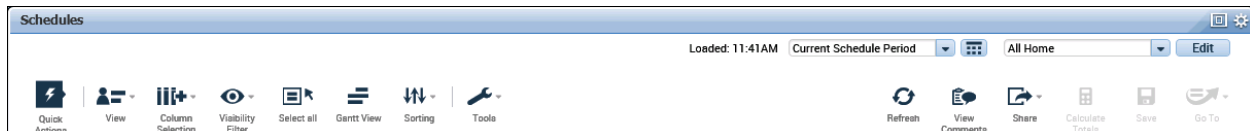
Schedules							
Loaded: 11:41AM   Current Schedule Period   All Home   Edit							
<div> <div>Quick Actions</div> <div>View</div> <div>Column Selection</div> <div>Visibility Filter</div> <div>Select all</div> <div>Gantt View</div> <div>Sorting</div> <div>Tools</div> <div>Refresh</div> <div>View Comments</div> <div>Share</div> <div>Calculate Totals</div> <div>Save</div> <div>Go To</div> </div>							
By Employee	5/28 - 6/03						
Name	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/01	Fri 6/02	Sat 6/03
Adams, Julie		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Aguirre, Raymo...		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Anderson, Jam...		9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	
Arick, Michael		3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	
Babson, Mildred		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Baker, Ginger							
Billings, Thomas		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Boyd, Mary J							
Brooks, Bob		9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	
Carpenter, Jill		11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
Clifford, Lisa							
< Indiv All >	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/01	Fri 6/02	Sat 6/03
Employee... 1142...	0:00	228:30	228:30	228:30	228:30	228:30	0:00
Employee... 44.000	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.



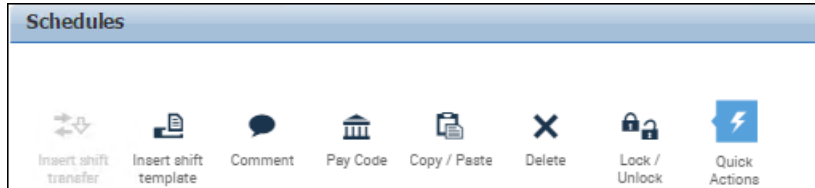
Schedules							
Loaded: 11:41AM   Current Schedule Period   All Home   Edit							
<div> <div>Quick Actions</div> <div>View</div> <div>Column Selection</div> <div>Visibility Filter</div> <div>Select all</div> <div>Gantt View</div> <div>Sorting</div> <div>Tools</div> <div>Refresh</div> <div>View Comments</div> <div>Share</div> <div>Calculate Totals</div> <div>Save</div> <div>Go To</div> </div>							



## 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.

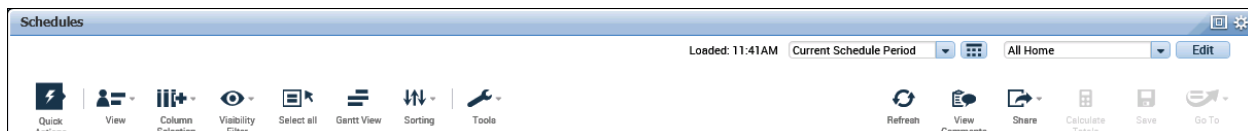
When you select the Quick Actions icon from the tool bar, the icon moves from left to right to reveal the Quick Action options.



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.



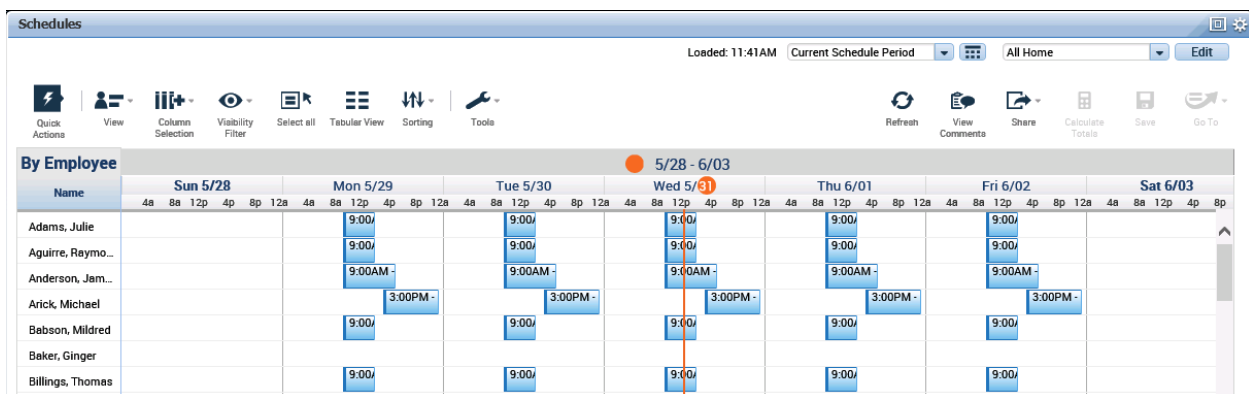
Menu item	How to use
Employee data views	<p>Employee schedule data can be viewed by employee, by group, or by employment terms. Select the view from the View menu located in the Action bar to change the view of the data that is presented.</p> <ul style="list-style-type: none"> <li>• By Employee: Alphabetical 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 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 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.



## 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:
  - It does not display segment information, only shift labels or start/end times
  - It shows shifts only in the day the shift starts, even if the shift extends to the next day



Schedules

Loaded: 11:41AM Current Schedule Period All Home Edit

Quick Actions View Column Selection Visibility Filter Select all Gantt View Sorting Tools Refresh View Comments Share Calculate Totals Save Go To

**By Employee** 5/28 - 6/03

Name	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/01	Fri 6/02	Sat 6/03
Adams, Julie		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Aguirre, Raymo...		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Anderson, Jam...		9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	
Arick, Michael		3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	
Babson, Mildred		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Baker, Ginger							
Billings, Thomas		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Boyd, Mary J							
Brooks, Bob		9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	
Carpenter, Jill		11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	11:00PM - 7:30AM	
Clifford, Lisa							

< > < >




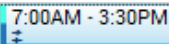
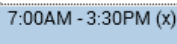
Indiv All	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/01	Fri 6/02	Sat 6/03
Employee... 1142...	0:00	228:30	228:30	228:30	228:30	228:30	0:00
Employee... 44.000	0.000	32.000	32.000	32.000	32.000	32.000	0.000

## Editing Schedules in Tabular View

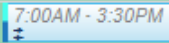
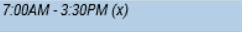
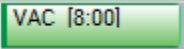

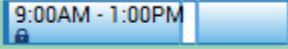
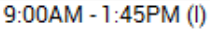
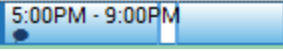
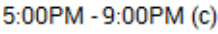
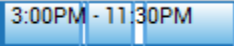






To edit schedules within tabular view, you can:

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

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

Visual cue	Sample Cue in Gantt view	Sample Cue in Tabular View	Event	Description
Orange highlights and vertical line			Displays the current date and time	Orange indicates the current day and in the Gantt view, the orange line indicates the progression of the day.
Employee lines that are shaded gray		Inactive employees do not appear in Tabular view	Indicates inactive employees	Employees who are inactive in the organization.
Double arrows			Transferred shift into the location is displayed in the Schedule Planner widget	The employee is scheduled to transfer from another location into the location displayed in the Schedule Planner widget. OR An employee displayed in the Schedule Planner widget is scheduled to transfer all or part of a shift to a location that is not loaded in the Schedule Planner.



Visual cue	Sample Cue in Gantt view	Sample Cue in Tabular View	Event	Description
Light gray, italic shift designation with double arrows			Transfer shift to a location that is not loaded in the Schedule Planner widget	The employee would typically appear in the Schedule Planner widget based on the location selected; however, the employee is scheduled to work a shift in a location that is not selected for display in the Schedule Planner widget.
Pay code abbreviation and hours			Pay Code edit	The employee is associated with the location in the Show field and time period, and has scheduled time off for that time period.
Lock icon			The shift has been locked and cannot be edited.	A shift has been locked so that it will not be edited manually or affected by scheduling engines.
Comment icon			There is a comment associated with the shift	A comment has been entered regarding the shift.
White space in shift		Assigned breaks do not display in Tabular view	One or more breaks is assigned during the shift	An employee is working a shift that has assigned breaks at specific times.
Red exclamation within a cell			Schedule Rule violation	At least one violation has a severity of No Save.
Orange exclamation within a cell			Schedule Rule violation	At least one violation has a warning severity.
Yellow exclamation within a cell			Schedule Rule violation	At least one violation has an informational severity

## Tabular view Textual Indicators

Textual Key
<b>d</b> Shift segment details
<b>i</b> Inheritance
<b>c</b> Comments



Textual Key	
o	Off
l	Locked
u	Unavailable
x	Transfer



## Note

Within the Schedule Planner grid, right-click on a cell to view actions.

Schedules

Loaded: 11:19PM

Current Schedule Period

All Home\*

Edit

Quick Actions

View

Column Selection

Visibility Filter

Select all

Gantt View

Sorting

Refresh

View Comments

Share

Save

Go To

By Employee

4/22 - 4/28

Sun 4/22

Mon 4/23

Tue 4/24

Wed 4/25

Thu 4/26

Fri 4/27

Sat 4/28

Name	Sun 4/22	Mon 4/23	Tue 4/24	Wed 4/25	Thu 4/26	Fri 4/27	Sat 4/28
ADAMS, ASHLEY		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	
ATWATER, TONY		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	
AYERS, TASIA		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	
BAILEY, TARA		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	
BAKER, JACQUILINE		8:00AM - 2:00PM	8:00AM - 2:00PM	8:00AM - 2:00PM	8:00AM - 2:00PM	8:00AM - 2:00PM	
BLACKWOOD, GLORIA				7:15AM - 2:45PM	7:15AM - 2:45PM		
BRADLEY, BRANDOLYN		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	
BROOKS, ANGELA		7:15AM - 2:45PM	7:15AM - 2:45PM	7:15AM - 2:45PM	7:15AM - 2:45PM	7:15AM - 2:45PM	
BROWN, FREDERICK		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	
CARTER, KECIA		7:00AM - 3:30PM	7:00AM - 3:30PM	7:00AM - 3:30PM	7:00AM - 3:30PM	7:00AM - 3:30PM	
CHAPMAN, SHARON		7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	7:30AM - 3:00PM	

Indicators



By Employee		5/28 - 6/03			
Name	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	
Adams, Julie		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Aguirre, Raymo...		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	
Anderson, Jam...		9:00AM - 5:00PM	9:00AM - 5:00PM	9:00AM - 5:00PM	
Arick, Michael		3:00PM - 11:30PM	3:00PM - 11:30PM	3:00PM - 11:30PM	
Babson, Mildred		9:00AM - 2:00PM	9:00AM - 2:00PM		<div> Edit  Add Pay Code  Delete  Lock  Unlock  Cut  Copy  Paste  Edit Accrual Amounts  Add shift </div>
Baker, Ginger			9:00AM - 2:00PM		
Billings, Thomas		9:00AM - 2:00PM	9:00AM - 2:00PM		
Boyd, Mary J					
Brooks, Bob		9:00AM - 5:00PM	9:00AM - 5:00PM		
Carpenter, Jill		11:00PM - 7:30AM	11:00PM - 7:30AM		
Clifford, Lisa					
Crowsoft, Mich...					

## 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		5/28 - 6/03
Name		Wednesday 5/31
Adams, Julie	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		
Billings, Thomas	9:00AM - 2:00PM	
Boyd, Mary J		

### Viewing Information for a Period of Time

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

By Employee		5/28 - 6/03			
Name	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	
Baker, Ginger					
Billings, Thomas		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	





## Note

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.

Your organization can choose to configure the system to utilize Rolling Request Periods which automates the opening and closing of schedule and request periods so you do not have to manually do this task.

## 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

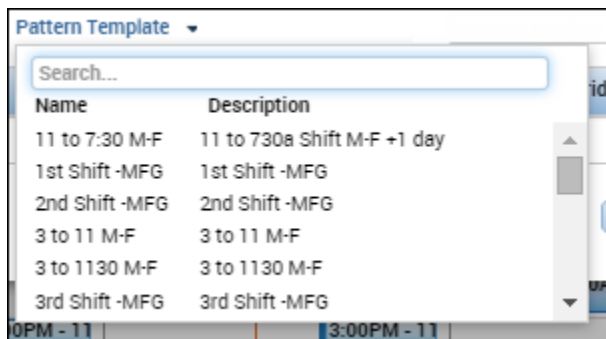
Patterns can be entered manually or by using a pattern template. A pattern template is a reusable tool that contains one or more shifts that rotate over a period of time.

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: \* 1 ☒ Week(s) ☐ Day(s) ☐ Override Other Patterns

Add Shift | Add Pay Code | Shift Template  | Pattern Template  9a-5p  Find

	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
 	1		9a-5p	9a-5p	9a-5p	9a-5p	9a-5p	



Cancel Apply

## 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: \* 1 ☒ Week(s) ☐ Day(s) ☐ Override Other Patterns

Add Shift | Add Pay Code | Shift Template  | Pattern Template  9a-5p  Find

	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
 	1		9a-5p	9a-5p	9a-5p	9a-5p	11a-5p	

Cancel Apply





## 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

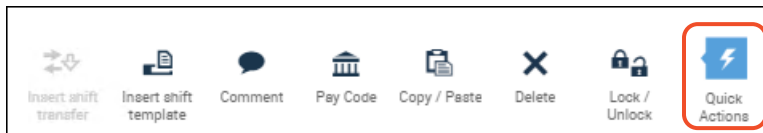
1. In the **Schedule Planner**, using the **Context Selector**, ensure that the group of employees you want, and the time period in which you want to add a shift, are displayed.
2. Click a **date cell** for an employee.
3. In the cell, enter the **start** and **end times** of the shift separated by a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

Aguirre, Raymo...	
Anderson, Jam...	9a-530p X

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	5/28 - 6/03				
Name	Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/01
Adams, Julie		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM
Aguirre, Raymo...		9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM	9:00AM - 2:00PM
Anderson, Jam...		9:00AM - 5:30PM	9:00AM - 5:30PM	Select the day to paste the item.	9:00AM - 5:00PM

- Click the **Copy/Paste** function again to turn the feature off.
- 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-5:00pm(8:00h)

Primary Job  
...anization/MFG/SE/Miami/Olsen/Asmb/FASmb/AsbBO

Insert Template

Shift Label  
9a-5p

Repeat this shift for  
days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	5/29/2017	Regular	9:00am	5:00pm	5/29/2017	8:00			

Comments (0) [Add Comment](#)

Cancel Apply

## 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

- Locate the employee's row and right-click the **cell** in the row and under the date where you want to add a shift.
- Select **Add Shift**.
- 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 9:00am-5:00pm(8:00h)
Primary Job Organization/MFG/SE/Miami/Olsen/PayMG

Insert Template ▼
Shift Label 9a-5p
Repeat this shift for 2 days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	5/30/2017	Regular	9:00am	5:00pm	5/30/2017	8:00			

Comments (0) [Add Comment](#)

Cancel Apply

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: \* 5/11/2015

Pay Code: \* Vacation

Amount (hh:mm): \* full sched day

☐ Override Shift
☒ Whole Shift
☐ Partial Shift

Start Time: \* 9:00am

Repeat for: 1 days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

Cancel Apply



## 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: \*  
6/05/2015

Pay Code: \*  
Bereavement

Amount (hh:mm): \*  
full sched day

☐ Override Accrual Days: 0

☒ Override Shift

☒ Whole Shift   ☐ Partial Shift

Start Time: \*  
9:00am

Repeat for: 2 days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

Cancel   Apply

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.

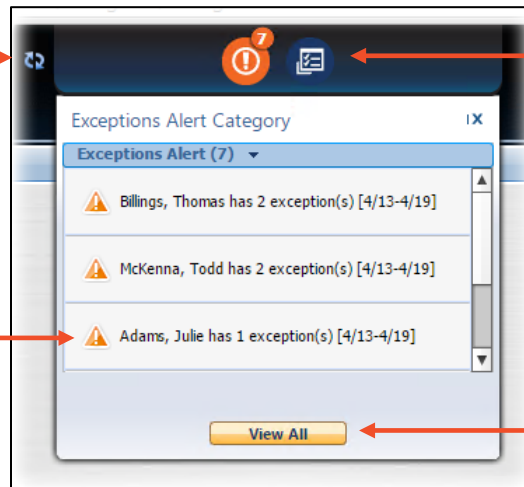
Select an employee from the list to access the Summary and Details views of the exceptions widget. When you click an employee's name, you are brought to the Details view of the Exceptions widget.

#### 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:

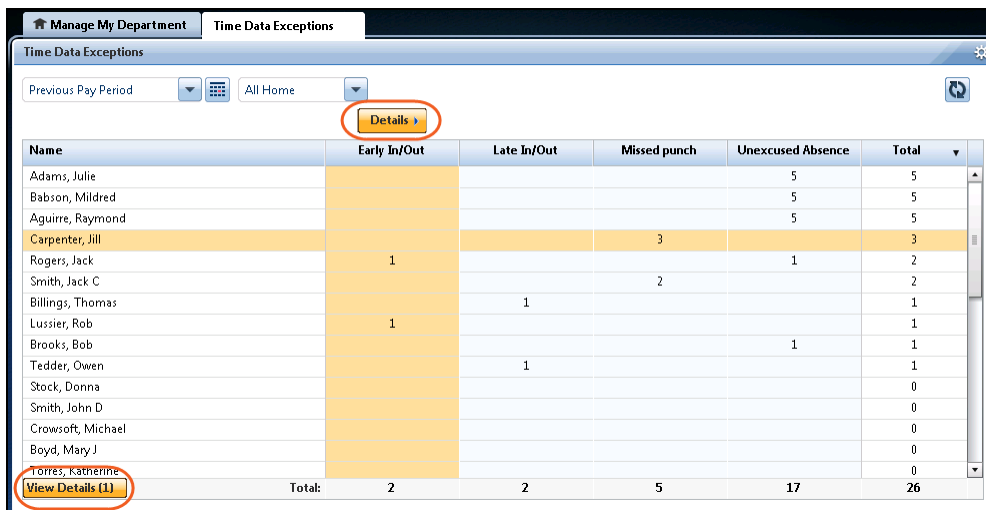
- Summary
- Details

## 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.

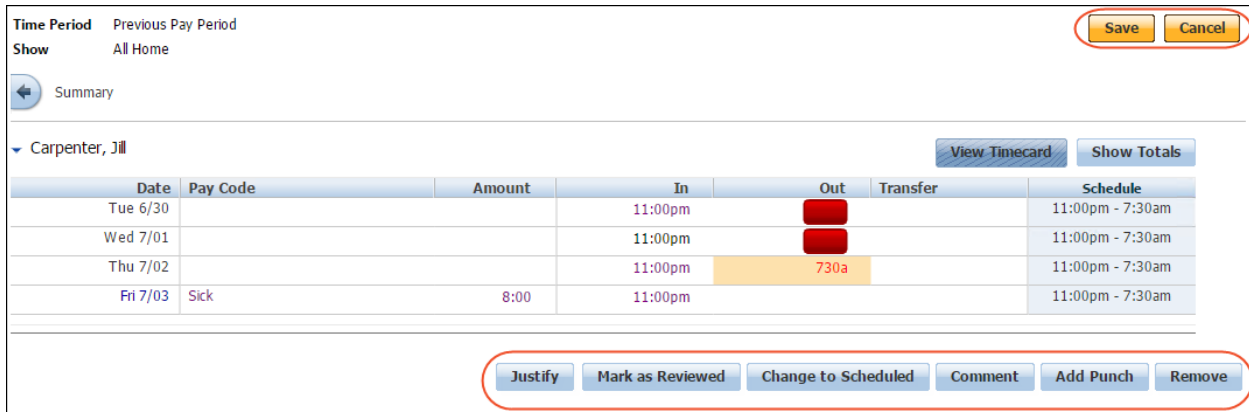
Action button	Description
Save	Save your changes to the database.
Cancel	Cancels changes that you made prior to saving.
Justify	Allows you to review exceptions that were either justified by employees or that need to be justified by you. You can approve the employee change, approve application-delivered 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.



#### Note

When making employee timecard edits to Justify Exceptions, your system administrator may have configured the system to allow for Standard and Cascading pay codes in addition to Duration pay codes.

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



Time Period Previous Pay Period

Show All Home

Summary

▼ Carpenter, J. View Timecard Show Totals

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			11:00pm - 7:30am
Fri 7/03	Sick	8:00	11:00pm	730a		11:00pm - 7:30am

Justify Mark as Reviewed Change to Scheduled Comment Add Punch Remove

Save Cancel



## 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>Late In</div> <div>(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.)</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**.



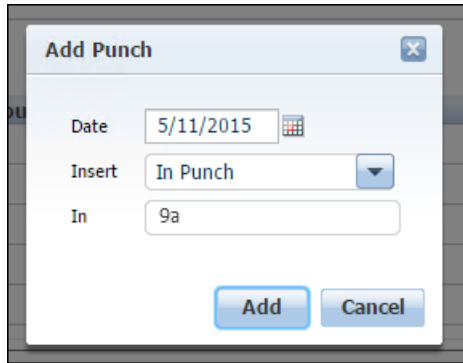
### Note

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 is a small window with a title bar containing a close button. It contains three input fields: 'Date' with a calendar icon, 'Insert' with a dropdown arrow, and 'In' with a text input. At the bottom are 'Add' and 'Cancel' buttons.

Date	5/11/2015
Insert	In Punch
In	9a

## 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.

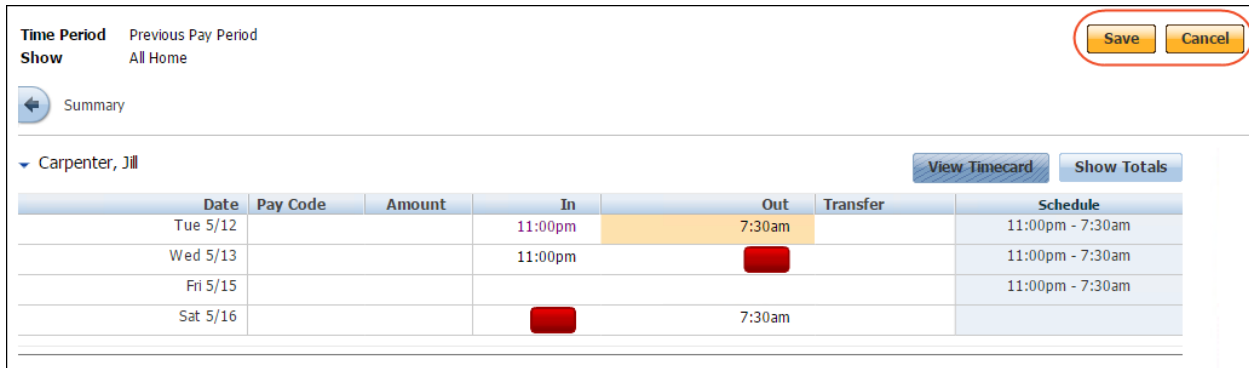


## Unsaved Data Indicators

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.



Time Period Previous Pay Period  
Show All Home

Summary

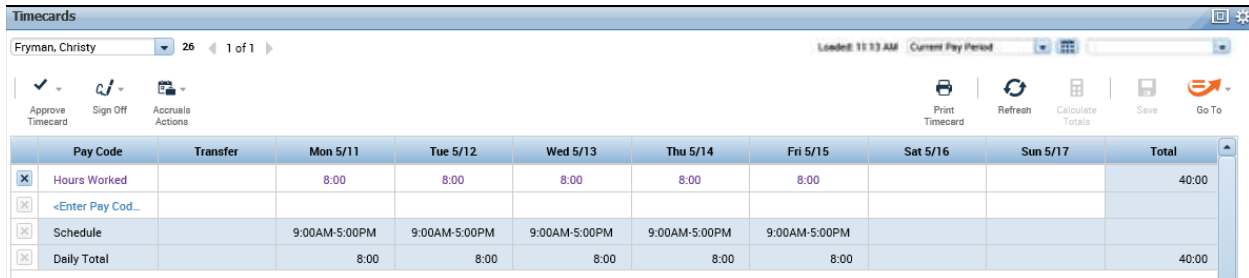
▼ Carpenter, J

View Timecard Show Totals

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.



Timecards

Fryman, Christy 26 1 of 1

Loaded: 11:13 AM Current Pay Period

Approve Timecard Sign Off Accruals Actions

Print Timecard Refresh Calculate Totals Save Go To

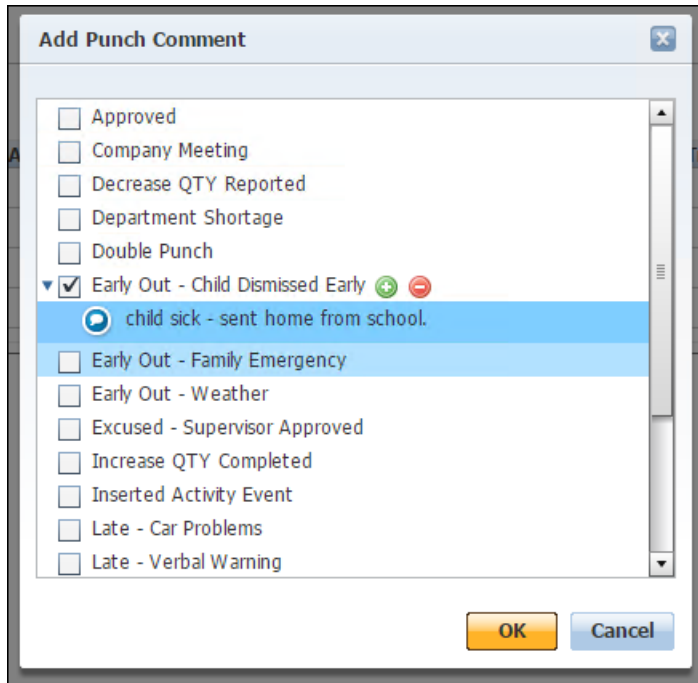
Pay Code	Transfer	Mon 5/11	Tue 5/12	Wed 5/13	Thu 5/14	Fri 5/15	Sat 5/16	Sun 5/17	Total
Hours Worked		8:00	8:00	8:00	8:00	8:00			40:00
<Enter Pay Cod...									
Schedule		9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM	9:00AM-5:00PM			
Daily Total		8:00	8:00	8:00	8:00	8:00			40:00

## 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 Save Cancel

Show All Home

 Summary

▼ Rogers, Jack View Timecard Show Schedule

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

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 Save Cancel

Show All Home

 Summary

▼ Rogers, Jack View Timecard Show Schedule

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

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  
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

Category: Audits Type of Edit: All Previous Pay Period 1 Employee(s) Selected Edit

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

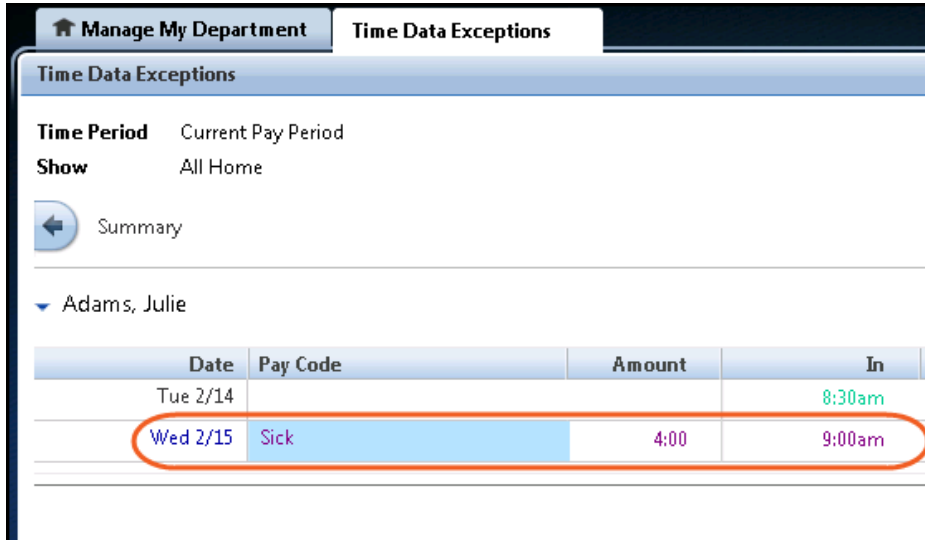
Before you remove a punch, attach and save a comment to it. You cannot add a comment to a punch after the punch is deleted. Adding a comment provides documentation about why you deleted the punch



## 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.



**Manage My Department** **Time Data Exceptions**

**Time Data Exceptions**

**Time Period** Current Pay Period  
**Show** All Home

← Summary

▼ Adams, Julie

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 Timecards

Workforce Central provides several methods for accessing 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 ▾

Previous Pay Period ▾

All Home ▾

Edit

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 Timecards

### Resolving Time Data discrepancies in the Timecard

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

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



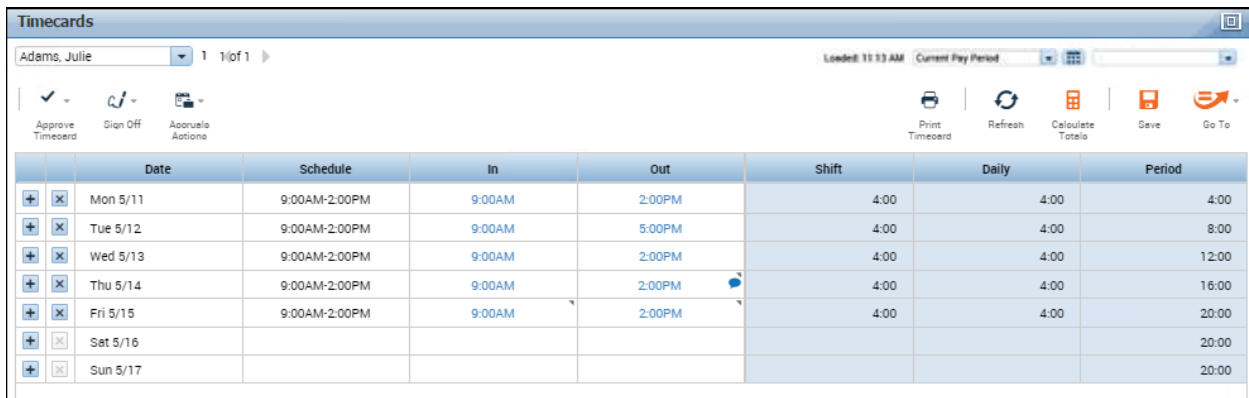
#### Note

When making employee timecard edits, your system administrator may have configured the system to restrict your choices to only those pay codes, work rules, job, codes, and labor accounts derived from the employee's assigned profile set. This restriction might be set, for example, to prevent inadvertently assigning a pay code or other item that is inappropriate to the employee in his or her timecard.

### 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
+	Mon 5/11	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	4:00
+	Tue 5/12	9:00AM-2:00PM	9:00AM	5:00PM	4:00	4:00	8:00
+	Wed 5/13	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	12:00
+	Thu 5/14	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	16:00
+	Fri 5/15	9:00AM-2:00PM	9:00AM	2:00PM	4:00	4:00	20:00
+	Sat 5/16						20:00
+	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		1 1 of 1		Loaded:			
✓	✗	✗	✗				
Approve Timecard	Sign Off	Approvals	Actions				
		Date	Schedule	In	Out	Transfer	Shift
+	✗	Mon 5/11	9:00AM-2:00PM	9:00AM	2:00PM	./319//	4:00
+	✗	Tue 5/12	9:00AM-2:00PM	9:00AM	2:00PM	./319//	4:00
+	✗	Wed 5/13	9:00AM-2:00PM	9:00AM	2:00PM	Search...	4:00
+	✗	Thu 5/14	9:00AM-2:00PM	9:00AM	2:00PM		4:00
+	✗	Fri 5/15	9:00AM-2:00PM	9:00AM	2:00PM		4:00
+	✗	Sat 5/16					
+	✗	Sun 5/17					



## Transfer

---

Name	PARKER, JERRY
Labor Account	
Work Rule	

Labor Account
Work Rule

Add Labor Account
Clear All

User Level:

Position:

Process Level:

Sub Finder:

Department:

Supervisor:

Job Code:

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 **Labor Account** tab of the **Transfer** dialog box and enter the following:
  - a. User Level
  - b. Process Level
  - c. Department
  - d. Job Code
  - e. Position
7. In the Work Rule Tab, select HRLY XFER Transfer
8. Click **Apply**.
9. 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 timekeeper applies an approval to a specified time period for an employee, the approval will need to be removed to perform further edits.

#### Visual Indicators of Timecard Approval Status

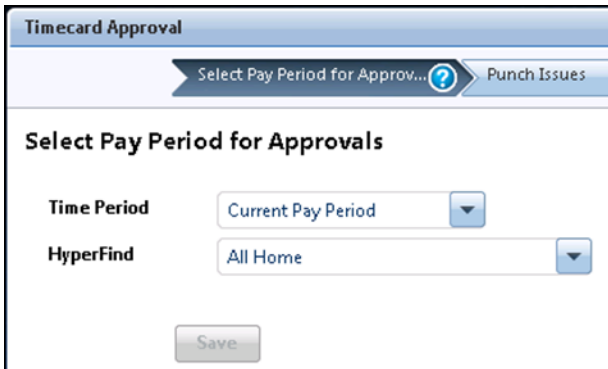
Workforce Timekeeper provides visual cues within employee timecards that represent approval statuses. The timecard is shaded various colors depending on where the timecard is within the approval process.

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

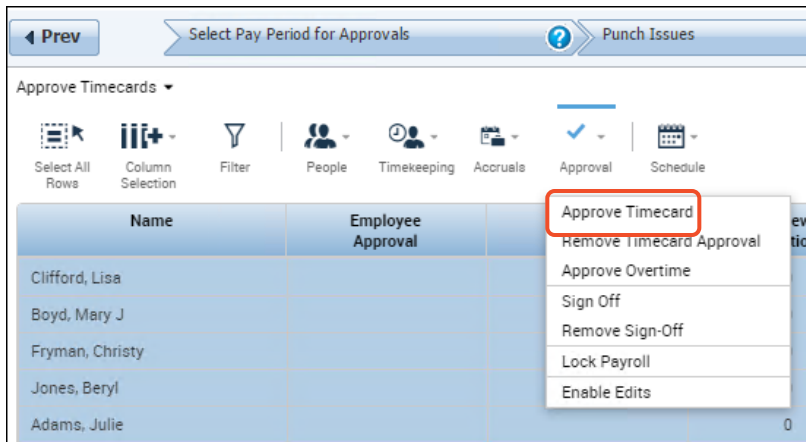
#### Approving Employee Timecards Using the Approval Wizard

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**.

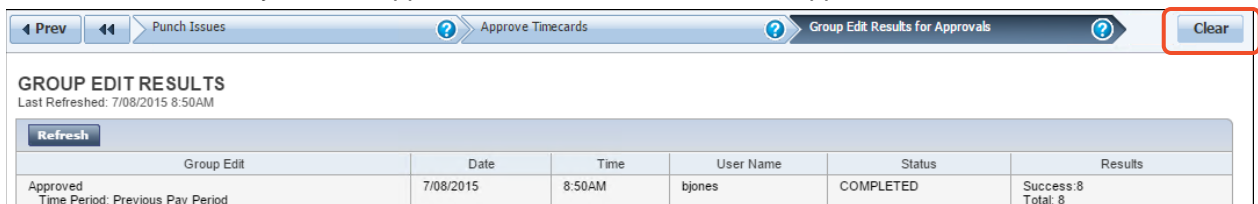


3. Click **Next**.
4. Review the **Exceptions** widget for any exceptions that have not been addressed. Correct the exceptions as necessary. Click **Next**.
5. Select one or more employees whose timecards you want to approve. Hint: If you are not viewing the applicable Genie, select the applicable Genie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

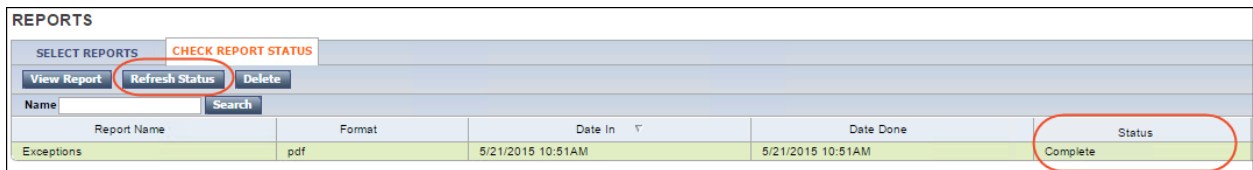
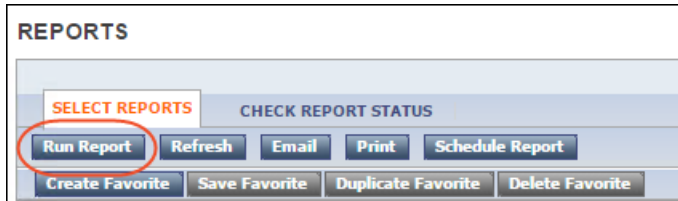


## Using Reports

### 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**.



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.



## Appendix



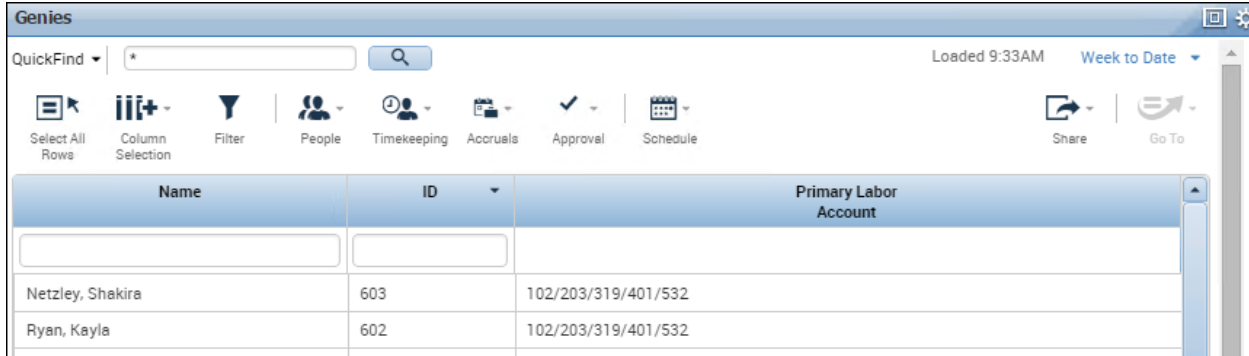
## Using the Workforce Timekeeper Interface



## 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' interface with a search bar at the top. Below the search bar are various filter icons: Select All Rows, Column Selection, Filter, People, Timekeeping, Accruals, Approval, and Schedule. To the right of these icons 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.



## 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
- Exceptions marked as reviewed in the timecard are displayed with a green checkmark
- After all exceptions of a specific type are marked as reviewed, they are removed from Reconcile timecard

Genies									
Reconcile Timecard									
Loaded 5:46PM Current Pay Period All Home Edit									
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	Totals Up-To-Date
Adams, Julie	✓								✓
Aguirre, Raymond	✓								✓
Anderson, James									✓
Arick, Michael	✓								✓
Babson, Mildred	✓								✓
Baker, Ginger									✓
Billings, Thomas	✓								✓
Boyd, Mary J									✓
Brooks, Bob									✓
Carpenter, Jill									✓
Clifford, Lisa									✓
Crowsoft, Michael									✓