WORKFORCE READY TLM MANAGER GUIDE

Job Aid

This job aid covers how to view, edit, and approve your employees timesheets along with other common tasks for managers.

TABLE OF CONTENTS

Page 1…………………………………………………………………...Common Tasks for Managers

Page 3…………………………………………………………………Viewing Employee Timesheets

Page 6……………………………………………...Editing a Timesheet – Correcting a Missing Punch

Page 7………………………………………………...Editing a Timesheet – Adding a New Time Entry

Page 9………………………………………………….Editing a Timesheet – Splitting a Time Entry

Page 10…………………………………………………….Editing a Timesheet – Canceling a Lunch

Page 11……………………………………………………..Approving My Employees Timesheets

Page 13………………………………………………….Approving or Rejecting a Time Off Request

Page 15………………………………………………………………….Accessing My Saved Reports

Page 16……………………………………………………………………….Running a Report

Common Tasks for Managers

This guide covers how to access and complete some common tasks performed by managers. The tasks covered include accessing your employees' information, manage employee timekeeping requests and view employee schedules.

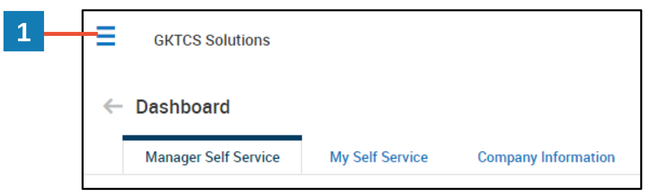
Accessing your My Team pages

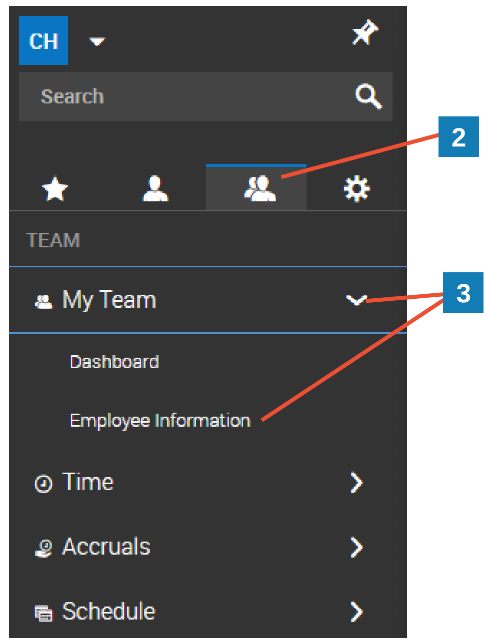
Most pages within the application that relate to manager tasks can be found under the My Team menu tab. Use these steps to locate your My Team menus.

1 Click **Show Menu**.

2 Click the **My Team** tab icon.

3 Click a menu to expand the menu tree or navigate to a page.





Accessing your employees' records

1 From your **My Team** menu tab, select **My Team > Employee Information**.

2 In the **My Employees** page, do either of the following to view an employee record(s).

- To view an individual record, click the **Employee Information** icon.
- To view multiple records, select the employees using the check boxes and click **View Selected Employees**.

Note: You can use the **Quick Links** icon next to an employee to view other pages related to an employee.

Viewing employee schedules

1 From your **My Team** menu tab, select **Schedule > Team Schedule View > Weekly/Daily Schedule** and select the appropriate time frame menu.

Viewing timesheets for your employees

1 From your **My Team** menu tab, select **Time > Timesheets > All Timesheets > Manage Timesheets** and select the appropriate time frame menu.

2 Do one of the following to view or edit information for a specific timesheet.

- To view or edit the timesheet, click the **Edit Timesheet** icon.
- To preview the hours on the timesheet, click the **Preview Timesheet** icon.

3 To view or edit information for multiple timesheets, select the timesheets using the checkboxes and click **View Timesheets**.

Approving timesheets for your employees

1 From any page, click your **My To Do Items** icon.

2 To view or edit a timesheet before approving it, click the **Open Timesheet** icon.

3 To approve the timesheet, click the **Approve** button.

Note: To approve multiple timesheets, select the To Do items using the checkboxes and click **Mass Approve**.

Viewing time off accrual balances for your employees

1 From your **My Team** menu tab. select **Accruals >Balances**.

2 Click the **View History** icon next to the employee to view a detailed history of the employee's time off.

Approving time off requests for your employees

1 From any page, click your **My To Do Items** icon.

2 In the To Do item, use the following to review or edit the request.

- To view the employee's accrual balance, click the **View Time Off Counts** icon.
- To modify the request, click the **Review/Modify Time Off Request** icon.
- To view of list of requests and their status for the same day, click the **View Schedule People** icon.

3 To approve the request, click **Approve**.

Note: To approve multiple requests, select the To Do items using the checkboxes and click **Mass Approve**.

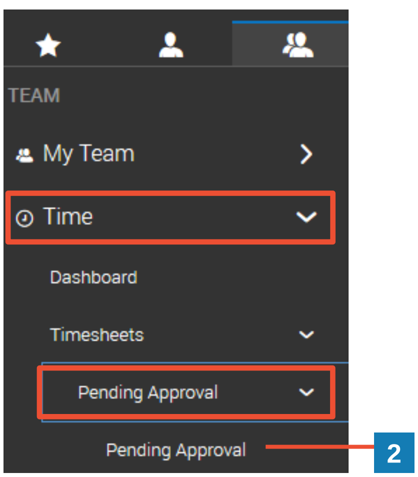
Job Aid

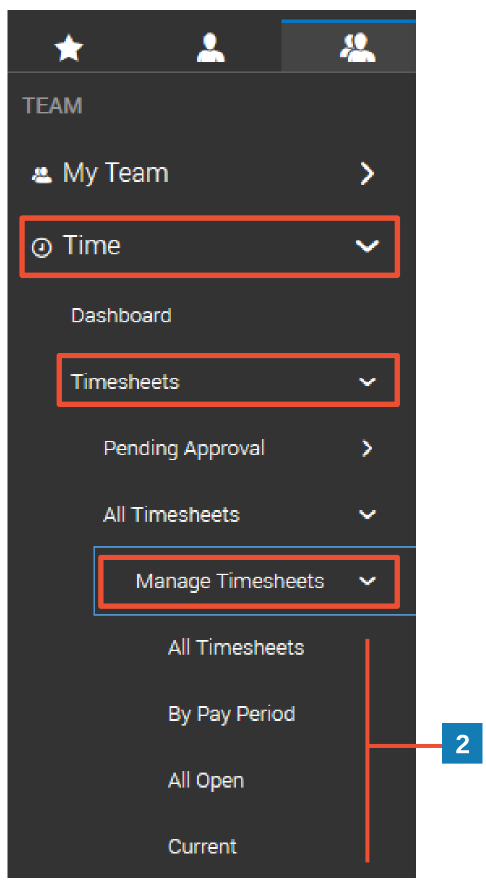
Viewing Employee Timesheets

The application contains several screens from which timesheets can be viewed. Details such as the approval status, change history (audit trail) and total hours can be viewed from the list screen. Additional reporting tabs can also be found inside individual timesheets. This job aid covers how to access and use the list views and introduces you to the reporting tabs within each timesheet.

Accessing a timesheet list screen.

1 Click **Show Menu**, click the **Team** tab, then navigate to **Time > Timesheets**.
2 From the **Timesheets** menu, click **Pending Approval > Pending Approval** or click **Timesheets > Manage Timesheets** and select one of the available submenus.
- **Pending Approval**—Shows all timesheets that are awaiting your approval
- **All Timesheets**—Shows all timesheets for a selected date range
- **By Pay Period**—Shows all timesheets associated with a pay period profile for a selected date range
- **All Open**—Shows all timesheets that have not been submitted for a selected date range
- **Current**—Shows all timesheets that include today's date

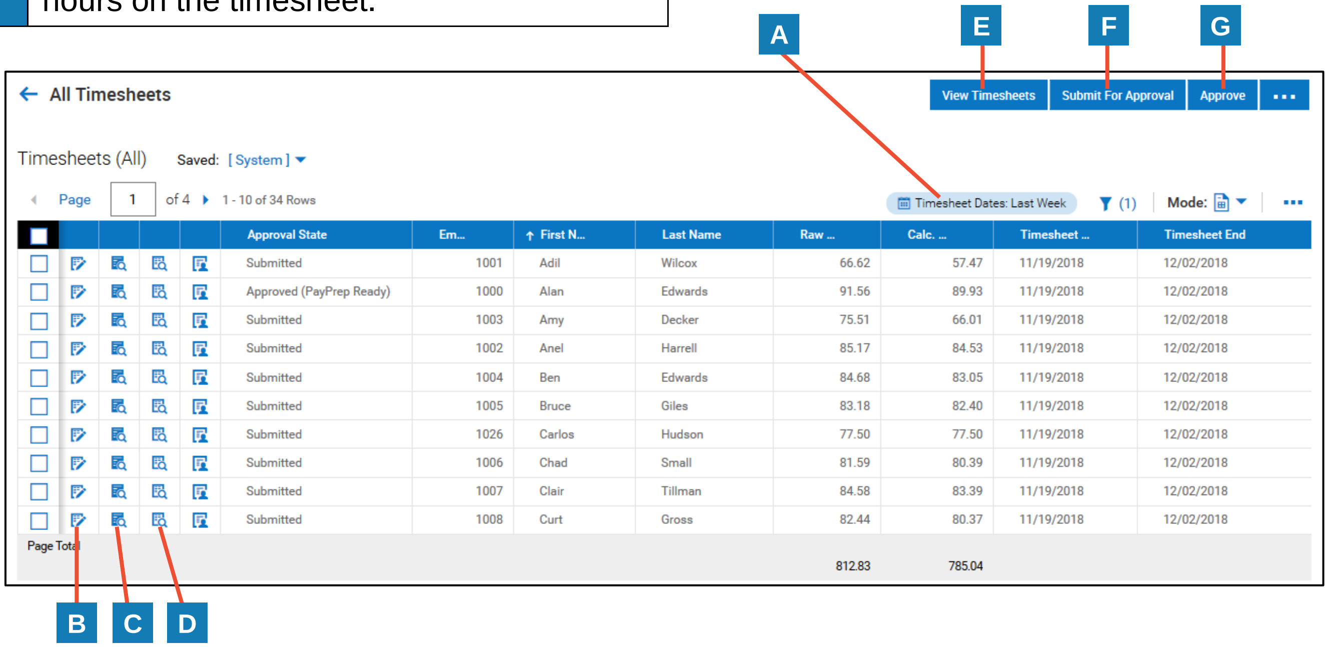




Using a timesheet list screen

Although each list screen is slightly different, most share some common features that can be used to help with your reporting and task needs.

A	**Date Filters:** Click this balloon to change the date range settings.
B	**View Timesheet:** Click this icon to open an individual timesheet.
C	**View Time Entries Audit Trail:** Click this icon to open a report of all changes made to the timesheet.
D	**Preview Timesheet:** Click this icon to open a summary report window of the raw hours on the timesheet.
E	**View Timesheets:** Select timesheets and click this option to view multiple timesheets.
F	**Submit for Approval:** Select timesheets and click this option to submit timesheets on behalf of the employee(s).
G	**Approve:** Select timesheets and click this option to approve multiple timesheet(s).



Individual Timesheet Reporting Tabs

When viewing timesheets, several tabs are available to view reported details of the time being captured and calculated. Below are some examples of the reporting tabs.

← Timesheet Edit

Employee: Adil Wilcox (1001) | Time Sheet: November 19, 2018 - December 02, 2018

Extra Pay & Counter Adjustment | Timesheet | Exceptions | Calc. Detail | Calc. Summary | Counters | Summary By Day

Calc. Detail

This report shows complete details of punched and calculated time.

Extra Pay & Counter Adjustment | Timesheet | Exceptions | Calc. Detail | Calc. Summary | Counters | Summary By Day

Date	Raw From	Raw To	Raw Total	Schedule	Exceptions	Calc. From	Calc. To	Calc. Break	Calc. Total	Weekly	Pay Period	Time Off	Cost Center	Rate Table 1 Rate	Regular	_Overtime
										Calc. Running Total						
Mon 11/19/2018	e Mon 08:26a	e Mon 05:29p	9.05	8am-5pm	LI LO	Mon 08:26a	Mon 12:40p	-	4.23	4.23	4.23		Location 1/Dept 200	11.00	8.55	
						Mon 12:40p	Mon 01:10p	0.50	-			Unpaid Lunch	Location 1/Dept 200			
						Mon 01:10p	Mon 05:29p	-	4.32	8.55	8.55		Location 1/Dept 200	11.00		
Tue 11/20/2018	e Tue 07:47a	e Tue 12:21p	4.57	8am-5pm	LO	Tue 07:47a	Tue 12:21p	-	4.57	13.12	13.12		Location 1/Dept 200	11.00	8.20	
						Tue 12:21p	Tue 01:37p	1.27	-			Unpaid Lunch	Location 1/Dept 200			
	e Tue 01:37p	e Tue 05:15p	3.63			Tue 01:37p	Tue 05:15p	-	3.63	16.75	16.75		Location 1/Dept 200	11.00		

Calc. Summary

This report shows a summary of the calculated hours by category.

Extra Pay & Counter Adjustment | Timesheet | Exceptions | Calc. Detail | Calc. Summary

Counter	Total
Holiday	8.00
Regular	73.77
_Overtime	2.22

Summary By Day

This report shows a summary of the calculated hours by category per day. It also includes weekly totals.

Extra Pay & Counter Adjustment | Timesheet | Exceptions | Calc. Detail | Calc. Summary | Counters | Summary By Day

Date	Raw Total	Calc. Total	Holiday	Regular	_Overtime
			Counters		
Mon 11/19/2018	9.05	8.55		8.55	
Tue 11/20/2018	8.20	8.20		8.20	
Wed 11/21/2018	9.50	9.00		9.00	

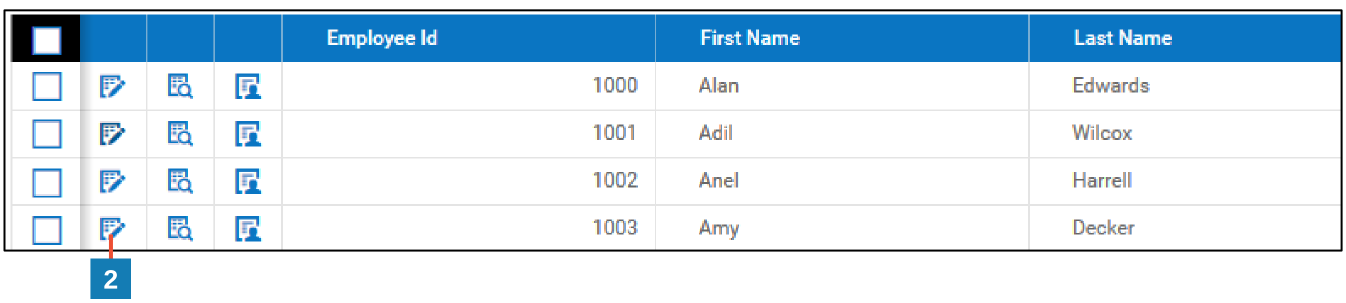
Editing a Timesheet – Correcting a Missed Punch

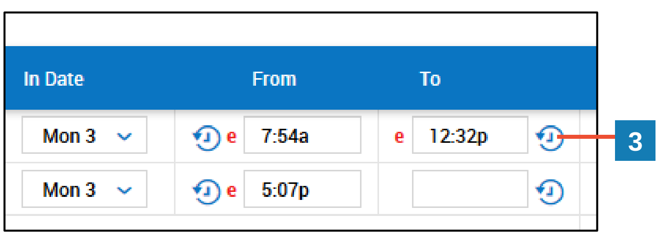
Job Aid

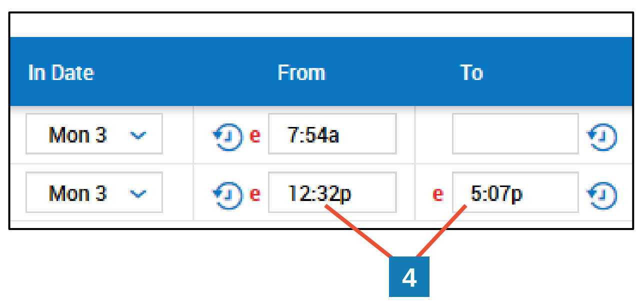
When an employee misses a punch, later punches may be reflected incorrectly on the timesheet. This job aid covers how to change the interpretation of a punch (i.e., changing an In punch to an Out punch) on a time entry.

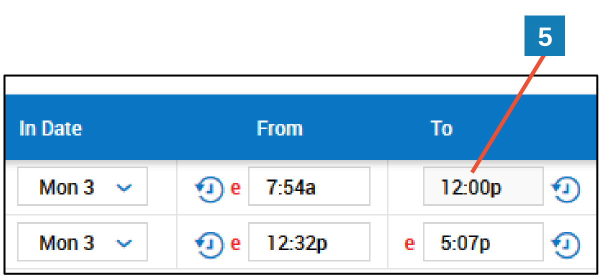
Correcting a missing punch using Change Punch Interpretation

1. Click **Show Menu**, click the **Team** tab, then navigate to **Time > Timesheets > All Timesheets > Manage Timesheets** and select **Current**.
   Note: Other menu options can be selected to edit past or future timesheets.
2. Click the **Edit Timesheet** icon for the employee you wish to edit.
3. Next to the punched time, click the **Change Punch In/Out Interpretation** icon.
4. Verify that later punches have been adjusted correctly.
5. In the **From** or **To** field, enter the time for the missed punch.
6. Click **Save**.









Editing a Timesheet – Adding a New Time Entry

Job Aid

Time entries can be added when needed to a timesheet. This may be needed if an employee forgets to punch in and out. This job aid covers how to add a new row to a day within the timesheet and enter the time entry information using available fields.

Adding a new time entry for an hourly employee

1 Click **Show Menu**, click the **Team** tab, then navigate to **Time > Timesheets > All Timesheets > Manage Timesheets** and select **Current**. (Note: Other menu options can be selected to edit past or future timesheets.)

2 Click the **Edit Timesheet** icon for the employee you wish to edit.

3 Next to the date, click the **Add Row** icon.

4 In the new row:

a. For each **Cost Center** field, select an appropriate value using the drop down or lookup icon.
Note: Cost Center columns may be labelled differently based on your organization's reporting terminology.

b. Click the **Time Off** drop down and select a time off type (if applicable).

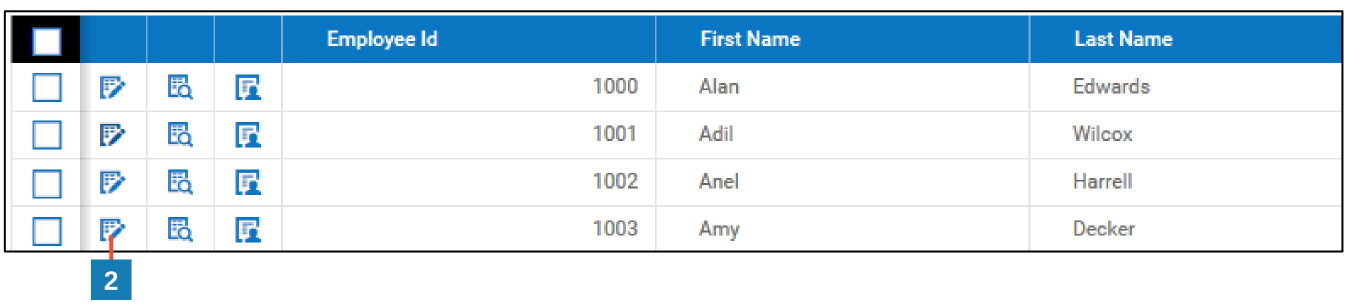
c. Click the **In Date** drop down and select the previous or next day if the start time of the entry occurs on a day other than the date of the time entry.

d. In the **From** field, enter the start time of the time entry. (This field can be skipped if you are entering a bulk amount of hours.)

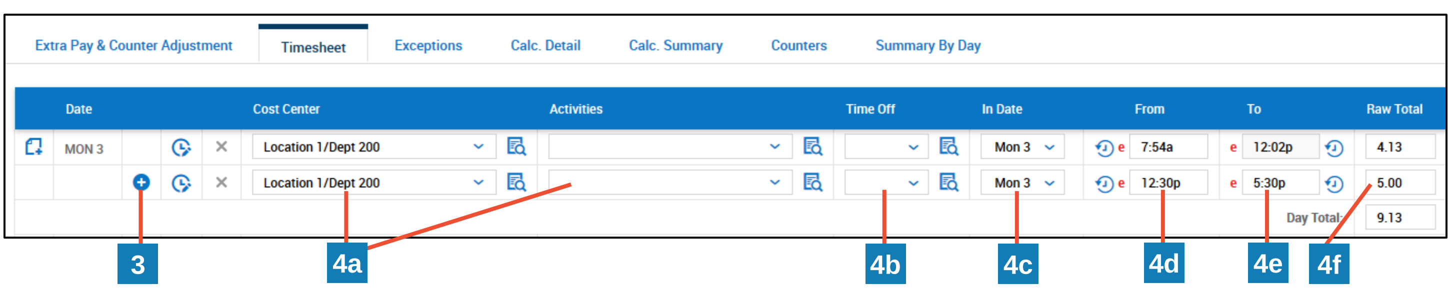
e. In the **To** field, enter the end time of the time entry. (This field can be skipped if you are entering a bulk amount of hours.)

f. In the **Raw Total** field, enter the total hours of the time entry. (This field can be skipped if times were entered in the From and To fields.)

5 Click **Save**.

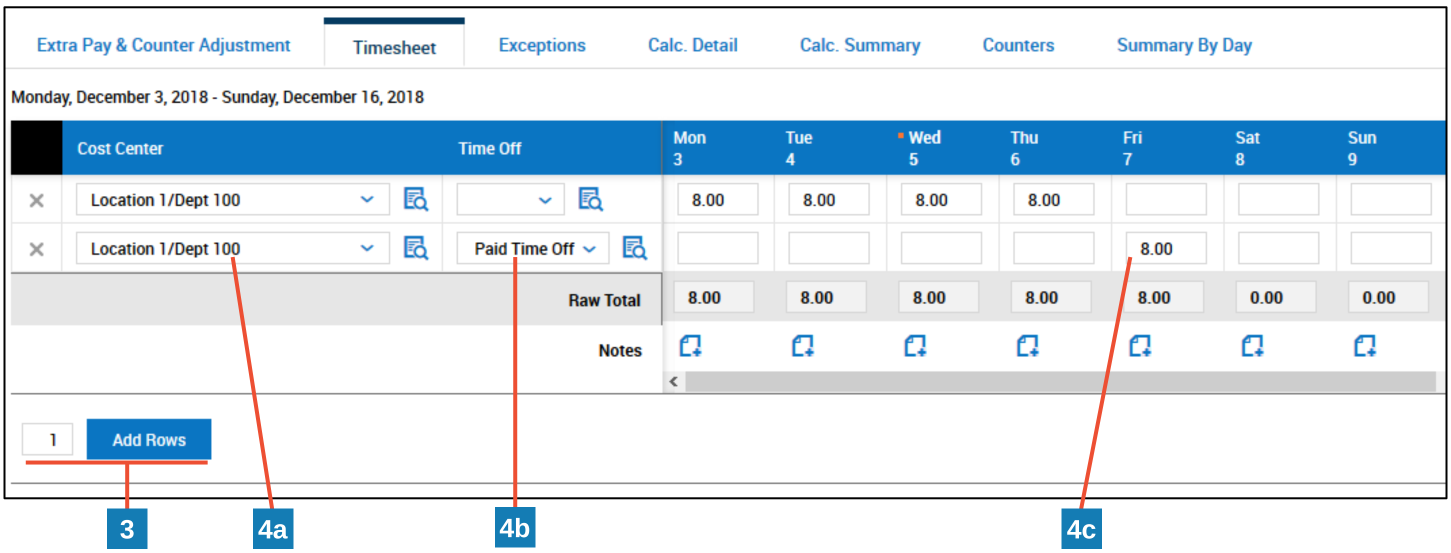


				Employee Id	First Name	Last Name
				1000	Alan	Edwards
				1001	Adil	Wilcox
				1002	Anel	Harrell
				1003	Amy	Decker



Adding a new time entry for a salaried employee

1. Click **Show Menu**, click the **Team** tab, then navigate to **Time > Timesheets > All Timesheets > Manage Timesheets** and select **Current**. (Note: Other menu options can be selected to edit past or future timesheets.)
2. Click the **Edit Timesheet** icon for the employee you wish to edit.
3. Click the **Add Rows**.
4. In the new row:
   a. For each **Cost Center** field, select an appropriate value using the drop down or lookup icon.
   Note: Cost Center columns may be labelled differently based on your organization's reporting terminology.
   b. Click the **Time Off** drop down or click the lookup icon and select a time off type (if applicable).
   c. In the applicable **Date** column, enter the total hours of the time entry.
5. Click **Save**.



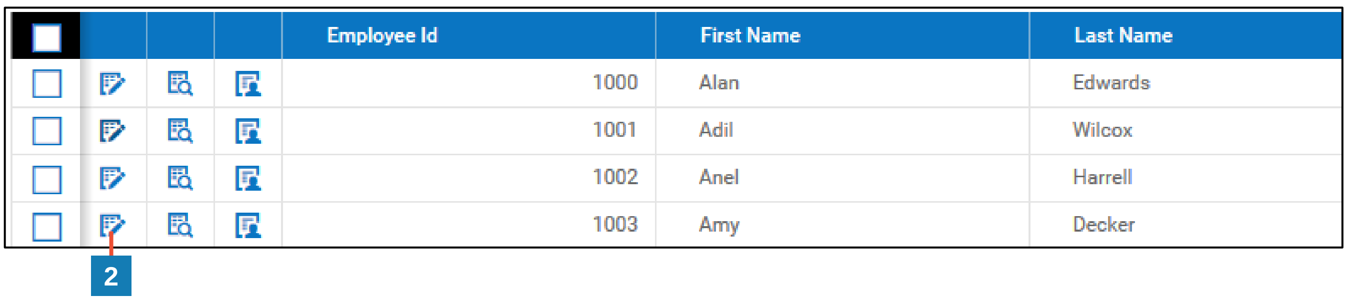
Job Aid

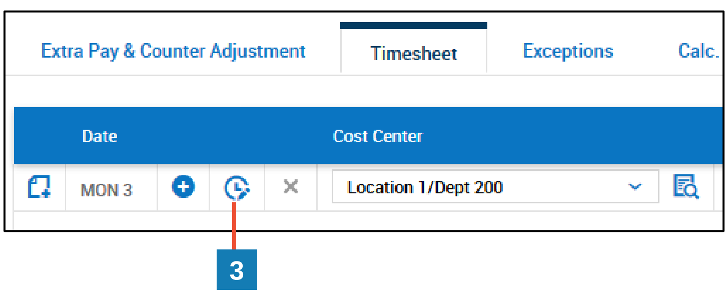
Editing a Timesheet – Splitting a Time Entry

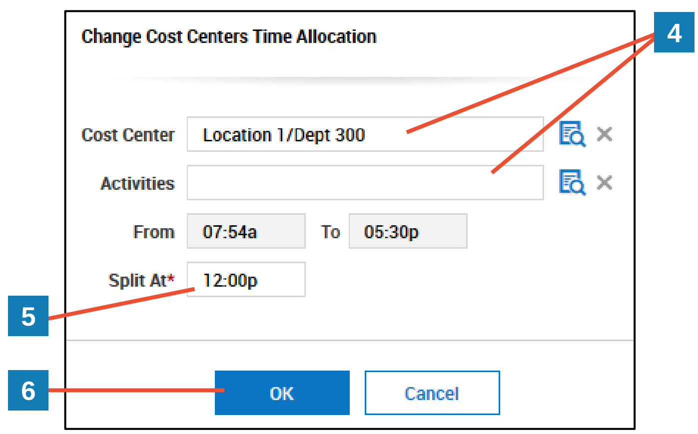
Time entries can be split for the purposes of allocating time to different cost centers (i.e., location, departments, positions.) This job aid covers how to split a time entry and select the cost center for allocation.

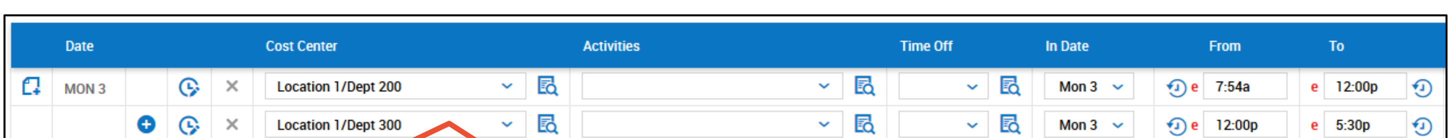
Splitting a time entry

1. Click **Show Menu**, click the **Team** tab, then navigate to **Time > Timesheets > All Timesheets > Manage Timesheets** and select **Current**.
   Note: Other menu options can be selected to edit past or future timesheets.
2. Click the **Edit Timesheet** icon for the employee you wish to edit.
3. Next to the date, click the **Change Cost Center Time Allocation** icon.
4. In the **Change Cost Centers Time Allocation** window, select the new cost center(s) for the allocation.
5. In the **Split At** field, enter the time when the new allocation should begin.
6. Click **OK**.









This example shows how the time entries have been adjusted by the split process.

Editing a Timesheet -- Canceling a Lunch

Job Aid

A lunch is typically canceled when an auto-deducted lunch is not taken by an employee since the person is working the entire shift with no break. The canceled lunch is completed using a column on the timesheet.

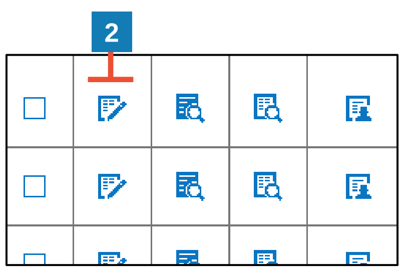
Canceling a Lunch In An Employee's Timesheet

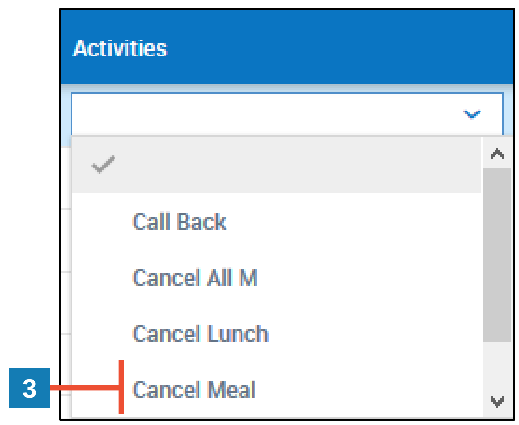
1 Click **Show Menu**, click the **Team** tab, then navigate to **Time > Timesheets > All Timesheets > Manage Timesheets** and select **Current**.

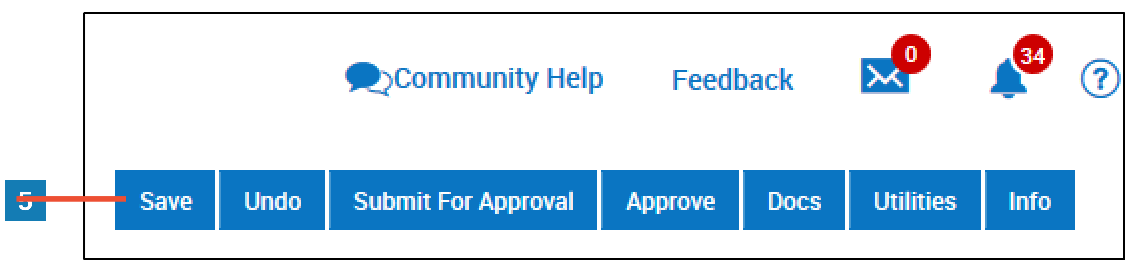
2 Click the **Edit Timesheet** icon for the employee requiring the canceled lunch.

3 Click the **Activities** drop down for the time entry in the timesheet and select **Cancel Lunch**.

4 Click **Save**.







Important Information

Canceled lunches may also be based on a penalty. This is when an employee is not given a lunch for a certain reason. The Activities drop-down menu provides additional options based on those penalties. Check with the timekeeping or company administrator of your organization to confirm what selections you should make for other lunch related scenarios.

Approving My Employees Timesheets

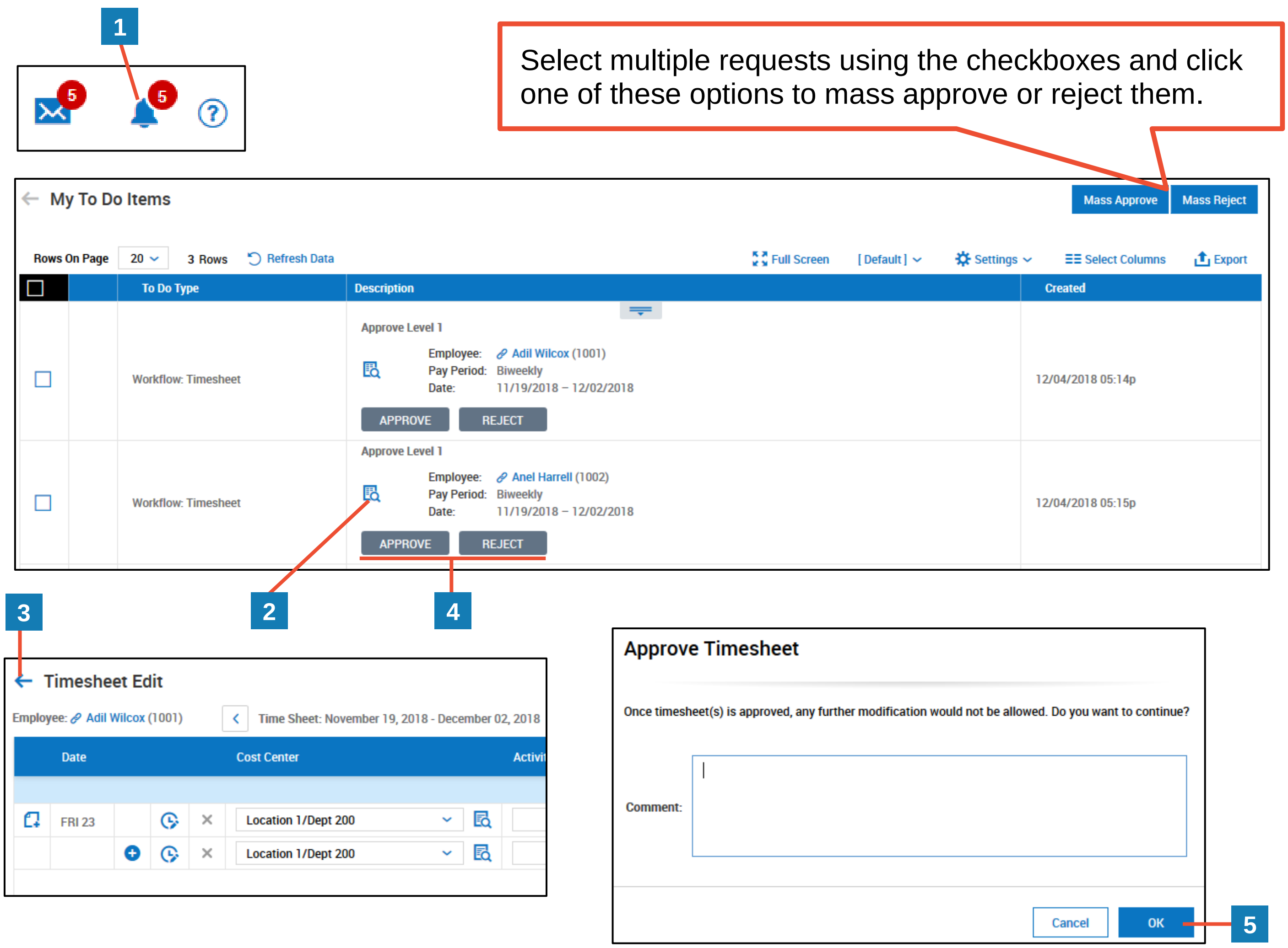
Job Aid

This job aid covers several ways to approve employee timesheets for payroll processing.

Approving or rejecting my employee's timesheet through My To Dos

1. Click the **My To Do** icon.
2. Use the **Open Timesheet** icon in the **Description** column to open the timesheet for review or to make changes.
3. Click **Back** to return to your **My To Do screen**.
4. In the **Description** column, click the **Approve** or **Reject** button.
5. Enter a comment (optional for approvals) and click **OK**.

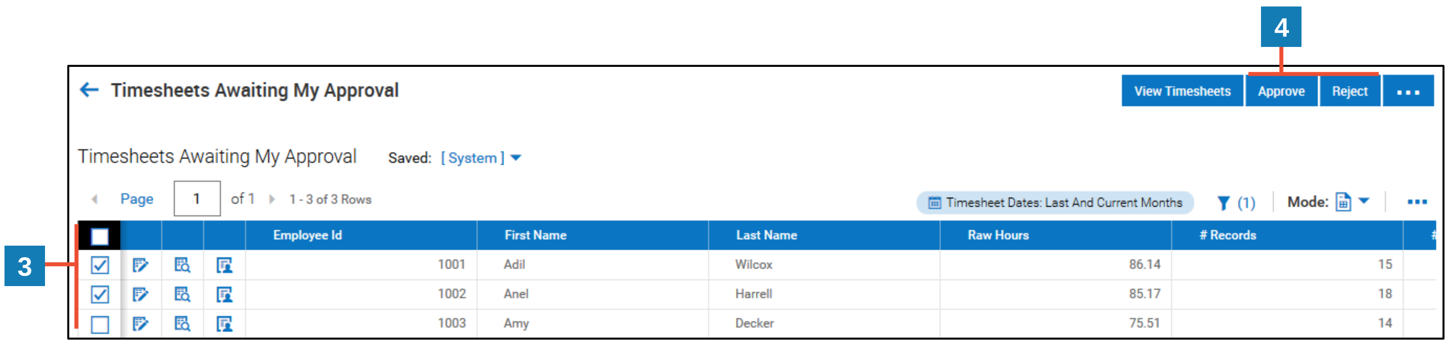
Note: You may not be able to make changes to the timesheet after it is approved. If changes need to be made after approval, the timesheet must be rejected by a higher-level approver or your payroll administrator.



Approving or rejecting my employee's timesheet from a list screen

You can approve one or more timesheets from any of the timesheet list screens.

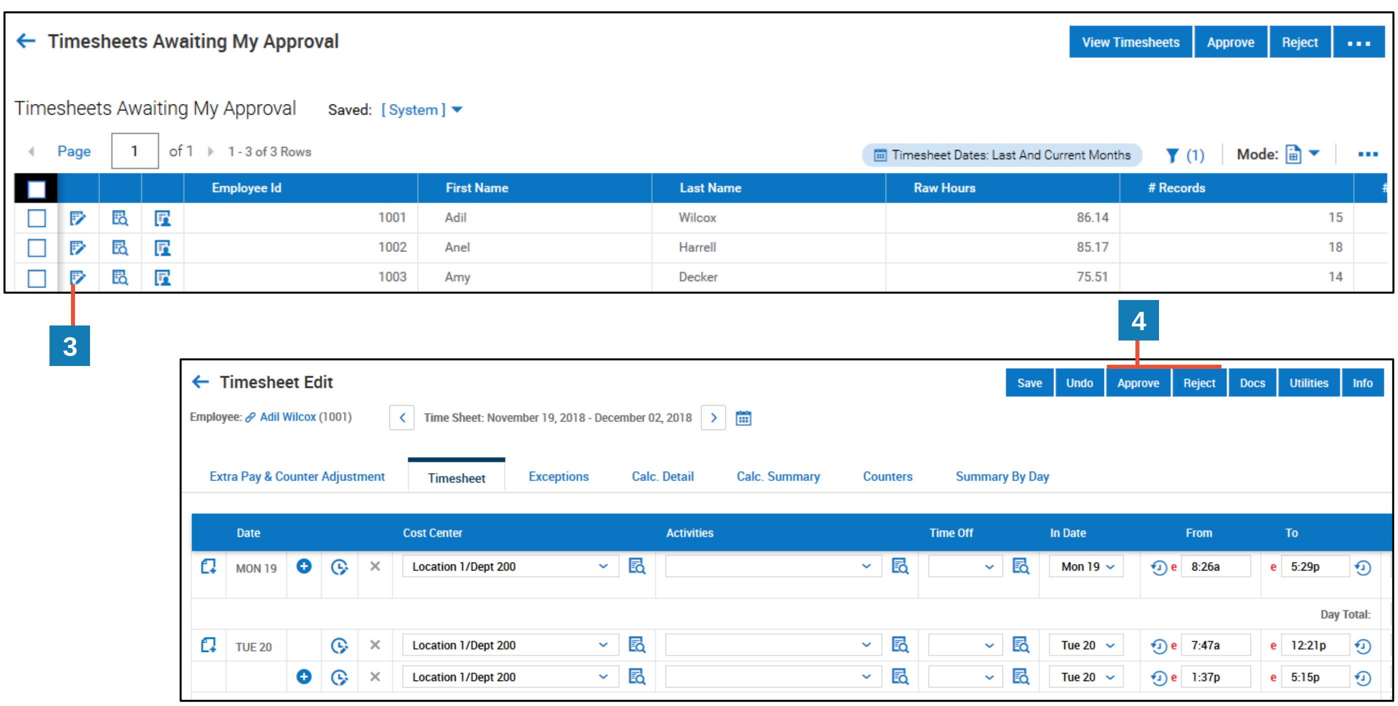
1 Click **Show Menu** , click the **Team** tab, then navigate to **Time > Timesheets**.
2 From the **Timesheets** menu, click **Pending Approval > Pending Approval** or click **Timesheets > Manage Timesheets** and select one of the available submenus.
3 Select the timesheet(s) to approve using the checkboxes.
4 Click **Approve** or **Reject**.
5 Enter a comment (optional for approvals) and click **OK**.



Approving or rejecting my employee's timesheet while viewing it

You can approve an individual timesheet while viewing it.

1 Click **Show Menu** , click the **Team** tab, then navigate to **Time > Timesheets**.
2 From the **Timesheets** menu, click **Pending Approval > Pending Approval** or click **Timesheets > Manage Timesheets** and select one of the available submenus.
3 Click the **Edit Timesheet** icon next to the timesheet you wish to approve.
4 In the **Edit Timesheet** screen, click **Approve** or **Reject**.
5 Enter a comment (optional for approvals) and click **OK**.



Approving or Rejecting a Time Off Request

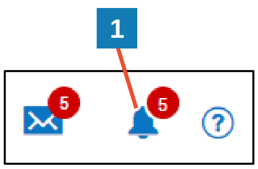
Job Aid

This job aid covers how to approve and reject a time off request submitted by an employee.

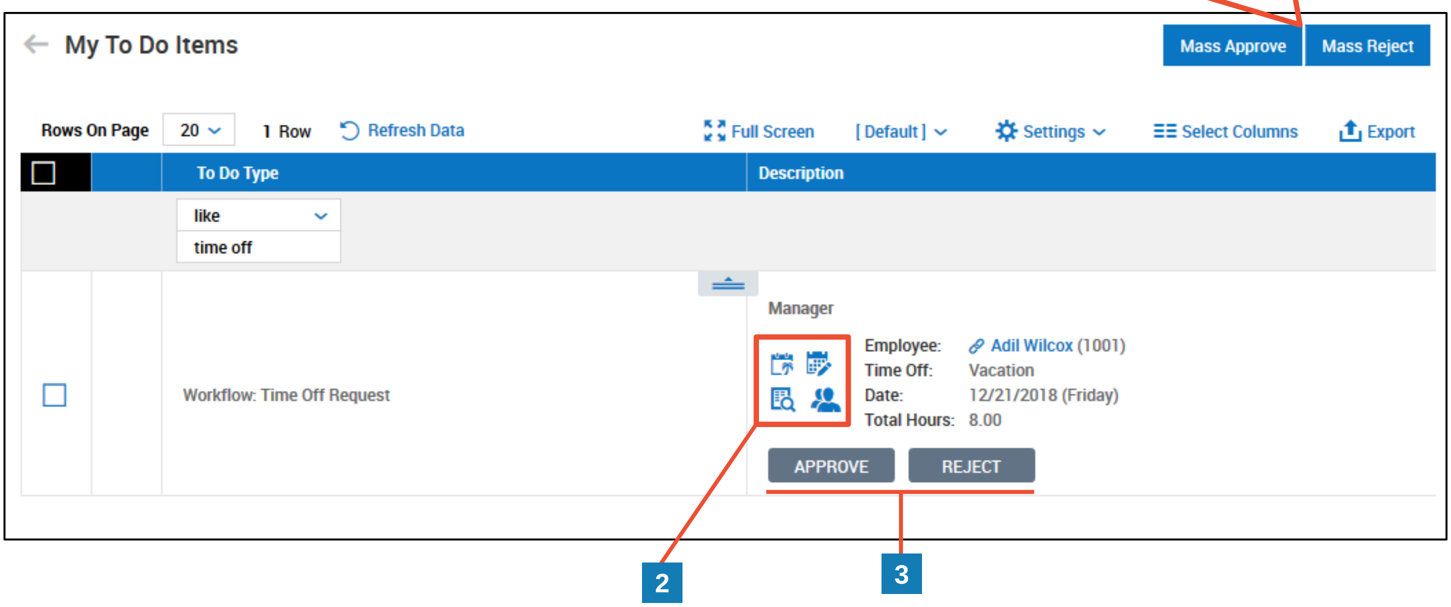
Approving or rejecting my employee's time off request

1 Click the **My To Do** icon.
2 Review the request details using the text and icons shown in the **Description** column.
3 In the **Description** column, click the **Approve** or **Reject** button.

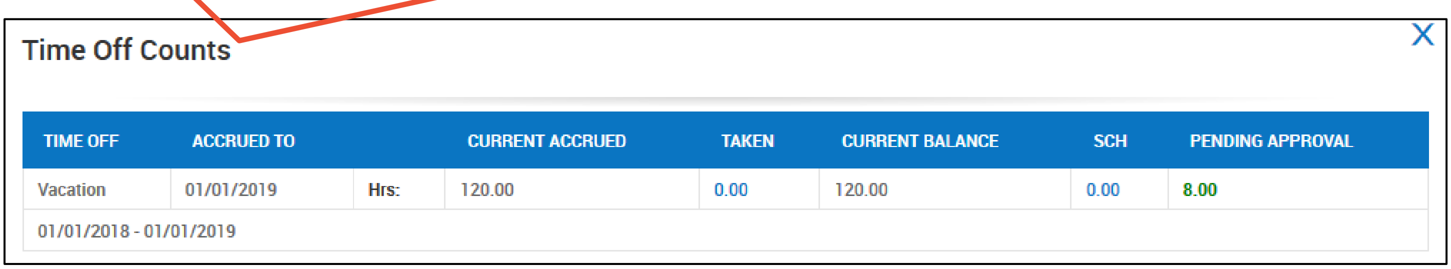
Note: After a approving a time off request, the time off hours will be added to the date on the employee's timesheet.



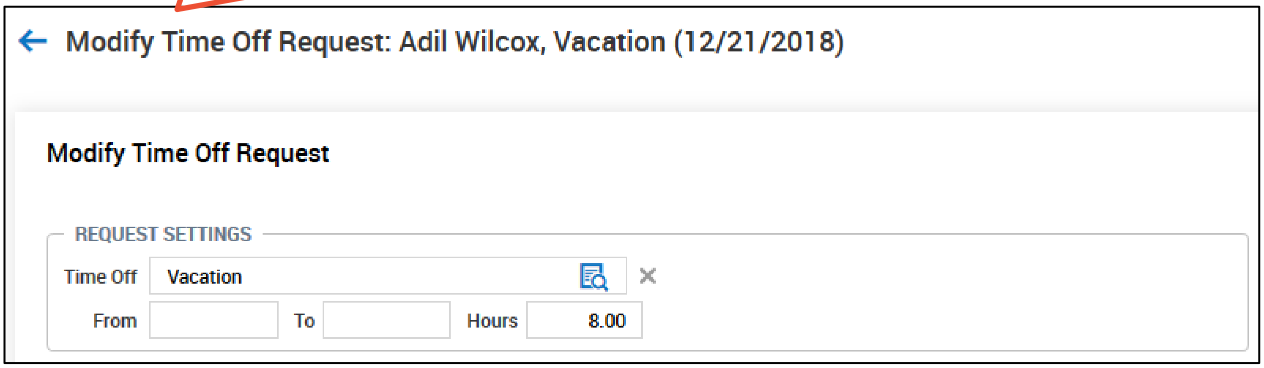
Select multiple requests using the checkboxes and click one of these options to mass approve or reject them.



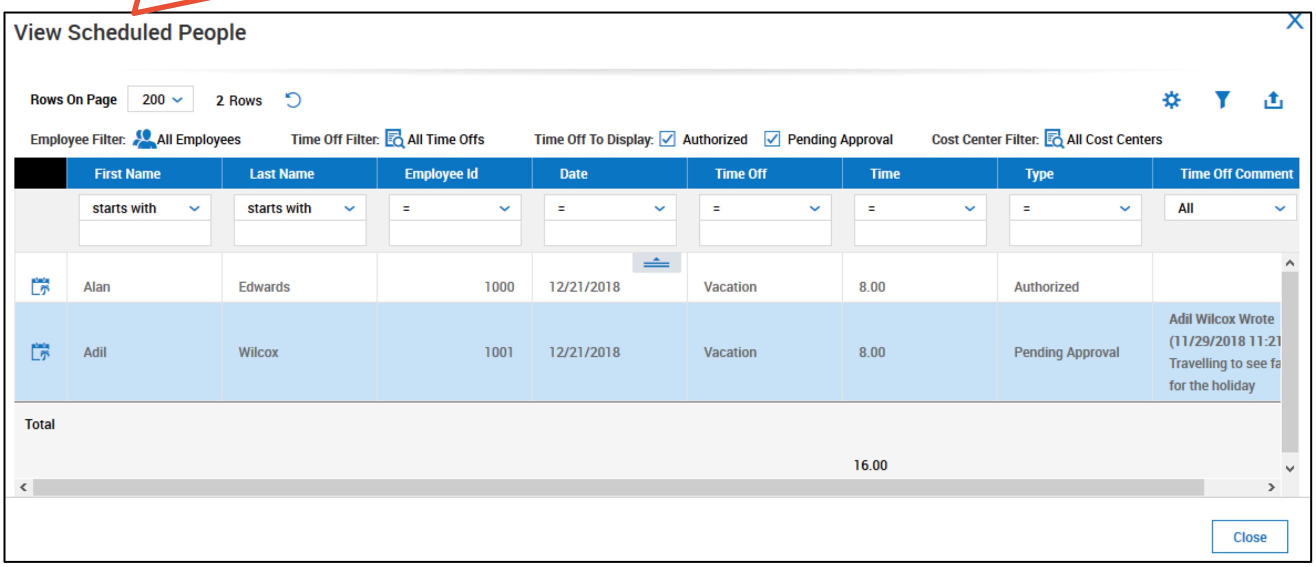
Time Off Counts shows you the employee's current accrual balances.



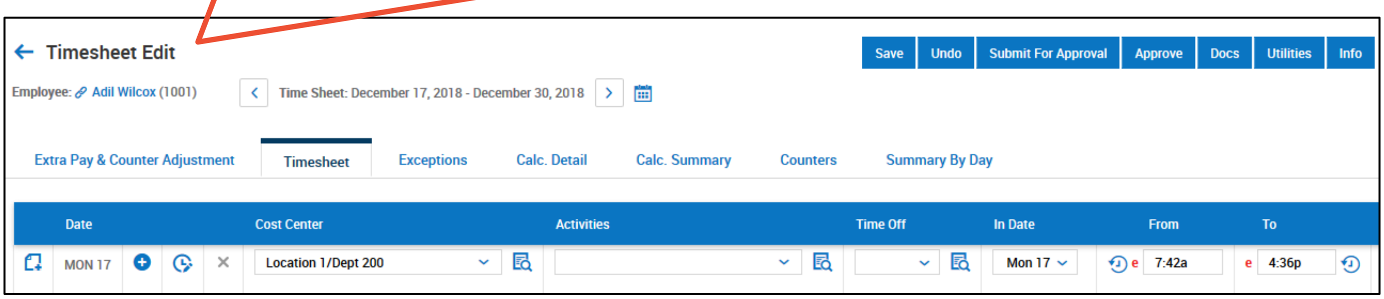
Review/Modify Time Off Request allows you to edit the request details.



View Scheduled People allows you to review the status of other employee requests for the same date.



Open Timesheet opens the employee's timesheet that includes the requested date.



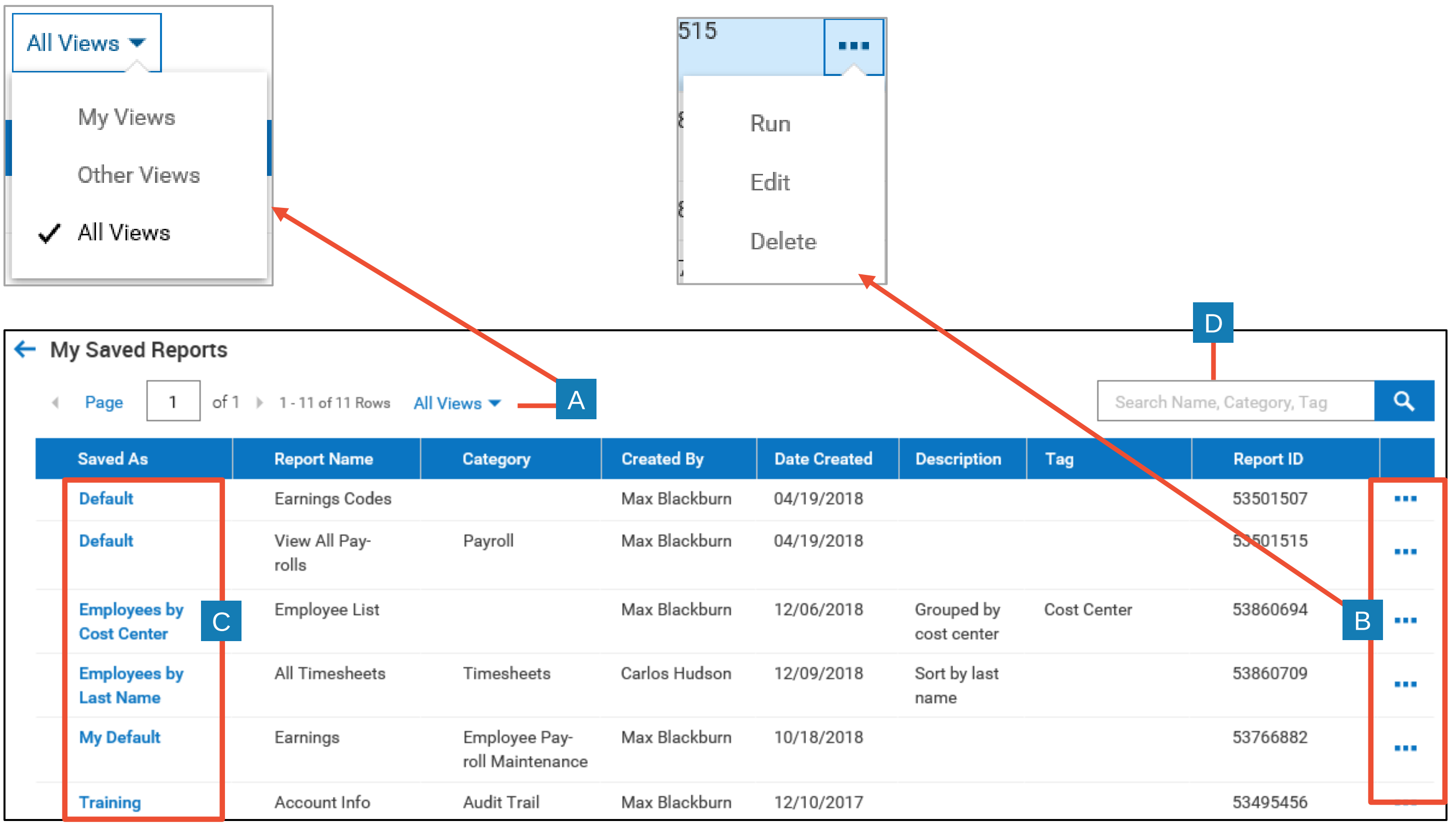
Accessing My Saved Reports

Job Aid

Use the **My Saved Reports** screen to access all reports you save throughout the application.

Accessing My Saved Reports

1 **Click Show Menu.**
2 Navigate to **My Info tab > My Reports** > **My Saved Reports**.



A	**View:** Select All Views, My Views, or Other Views. You may or may not have access to other user's reports.
B	**Ellipsis:** Click to display a menu with options to Run, Edit, or Delete a saved view. You can only edit or delete your own views. Views owned by others are run only.
C	**Report links:** Click to run the saved report.
D	**Search:** Search for a report view by name, category, or tag.

Running a Report

My Reports has a set of default reports that you can access. The reports available depend on your organization and your system access. This job aid guides you through navigating My Reports, so you can run, view, and export standard reports.

Accessing My Reports

The reports under **My Reports** are listed under the applicable module subcategory. The available reports vary based on your permissions.

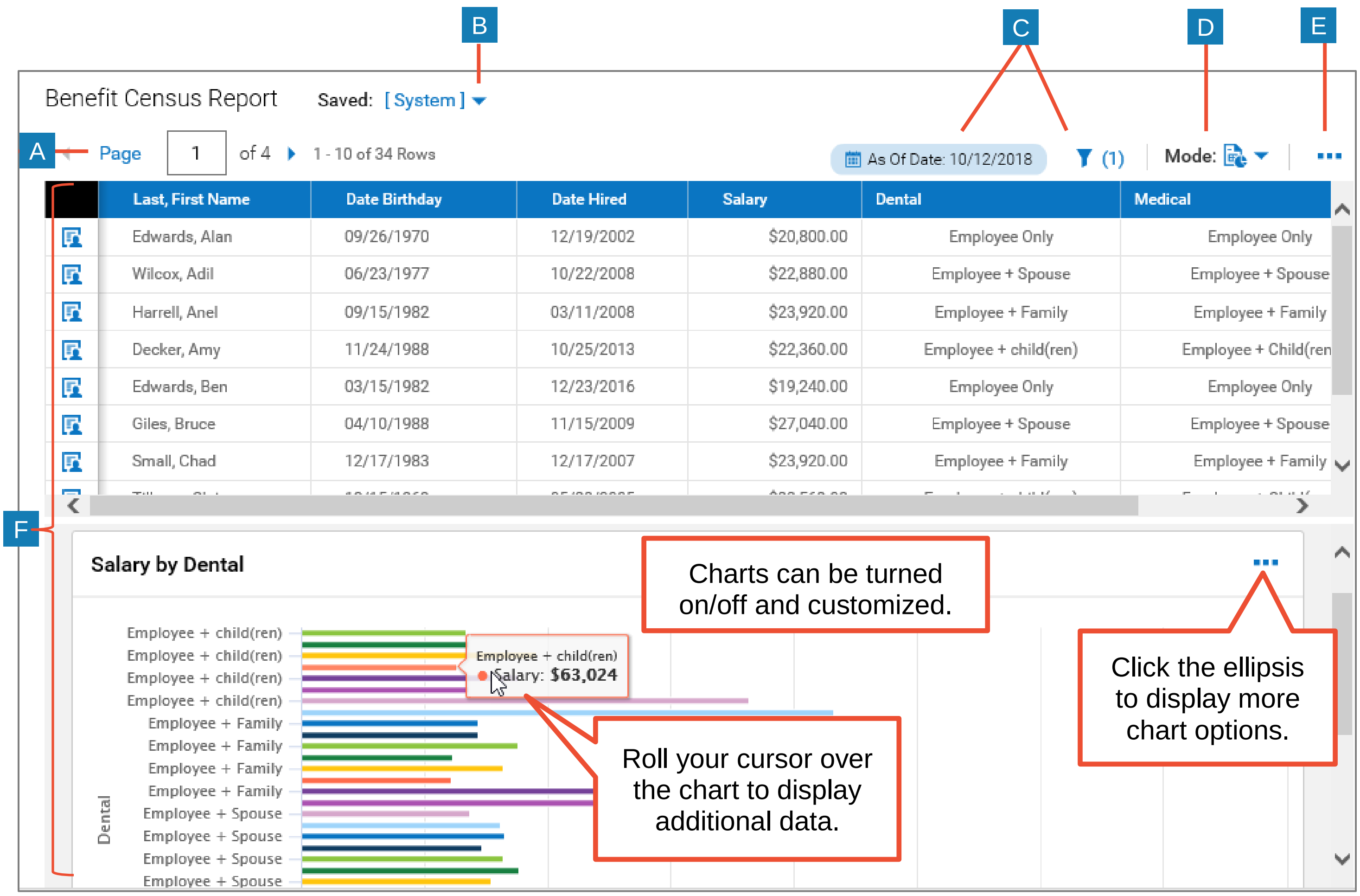
1 In the Menu, select the **My Info** tab.
2 Navigate to **My Reports**, then select any subcategory to display choices.
3 Click the report name to open it.

Navigating My Reports

Reports have various icons, filters, and actions available. The main areas of the page are highlighted below.

Did you know?

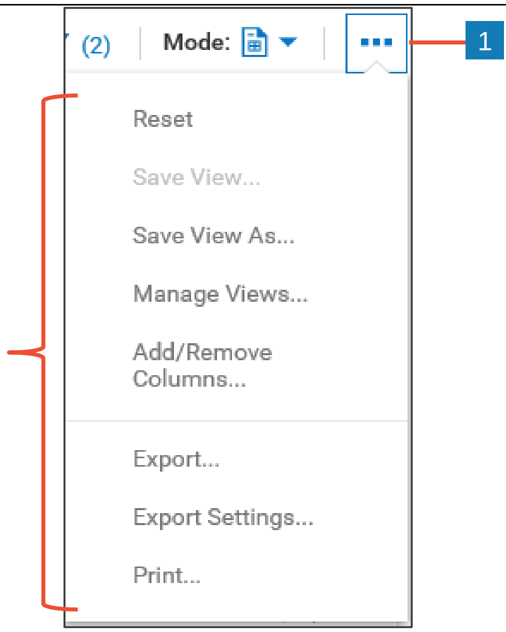
My Saved Reports is not module specific. This page provides an area from which to access all your saved reports from various areas throughout Employee Self Service.



A	**Page:** Use this setting to change the number of records per page.		D	**Mode:** Use to display data only, charts only, or both as shown in the image.
B	**View menu:** Click the drop-down arrow to display a list of available views. Saved views are added to this list.		E	**More (…):** Opens a menu with options such as saving views, exporting, and printing the report.
C	**Filter:** Use to set filter criteria for the report data including dates. You can adjust global and column filters.		F	**Report workspace:** This area displays record data based on your filters and selected columns.

Using the More (…) menu

1 Click the **Ellipsis (…)** button to open a menu.
The options are described in the following table.



Option	Description
Reset	Select to return the report to the original saved settings.
Save View	Select to keep changes to a saved view.
Save View As	Select to create a new saved view.
Manage Views	Select to display the Manage Views dialog box with a list of your saved views.
Add/Remove Columns	Select to display the Add/Remove Columns dialog box.
Export	Select to export the report data in a selected format such as Excel or PDF.
Export Settings	Select to display the Export Settings dialog box.
Print	Select to print the report. Options may vary depending on your printer setup.

Selecting Report Columns

Each report has a default set of columns. However, you can add, remove, and reorder columns.

1 Click **More …** then select **Add/Remove Columns**.

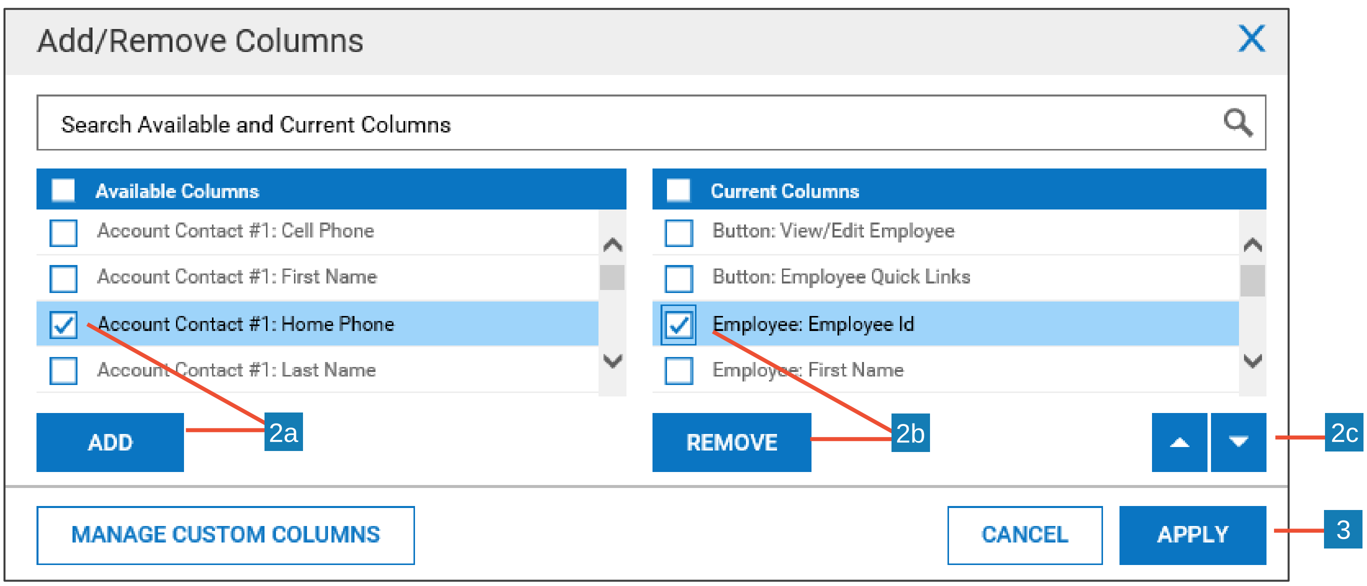
2 In the **Add/Remove Columns** dialog box, you can:

a. **Add columns**: In the Available Columns pane, select the check box of the column(s) you want, then click **Add** to move the columns to the Current Columns pane.

b. **Remove columns**: In the Current Columns pane, select the check box of the column(s) you want to remove, then click **Remove** to move the columns to the Available Columns pane.

c. To arrange columns, click the check boxes of the columns you want to move, then click the up and down arrows.

3 Click **Apply** to keep your changes to the report.



Filtering report columns

Each report has columns of data that you can filter, sort, and group.

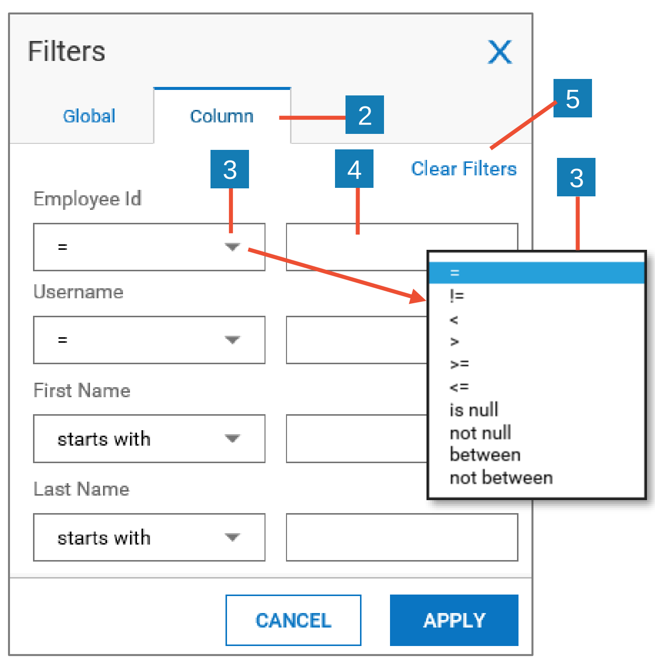
1 Click the **Filter** icon.

2 Click the **Column** tab.

3 Click the drop-down menu in the field below any column name and select the filter type.

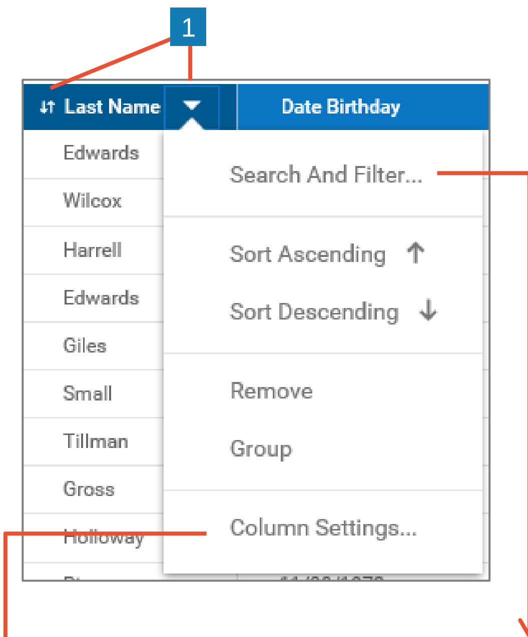
4 Enter the search criteria in the second field and click **Apply**.

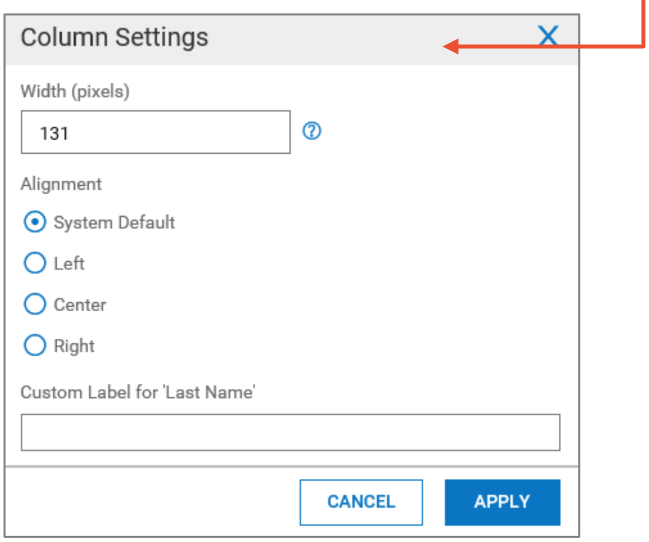
5 You can clear all filters by clicking **Clear Filters**.

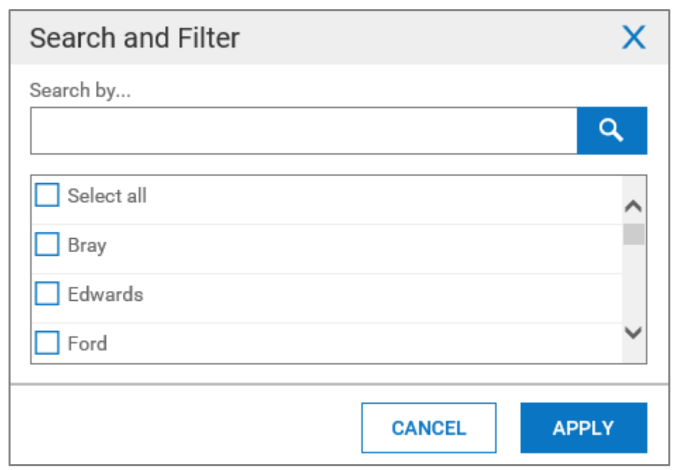


Using column menu options

1 Roll your cursor over any column heading to reveal sorting icons and a drop-down menu.
2 Click the drop-down arrow to open the menu. Options vary depending on the data type.
3 Click an option.
   - **Search And Filter**: Use to search for a specific column value.
   - **Sort Ascending/Descending**: Sort the report data based on this column.
   - **Remove**: Use to remove the column.
   - **Group**: Use to group results by this column.
   - **Column Settings**: Use to change the column appearance.







Exporting reports

You can export reports for further analysis.

1 In the More **(…)** menu, select **Export**.
2 The report header/footer data is included by default. To remove these items from your report, clear the **Display Information Header/Footer** check box.
3 Click the **Export File As** drop-down menu and select the applicable report format.
4 Click **Export**.
5 Save the report to your preferred location.