Time & Attendance

MyTime Manager Functions

Learn EmpCenter manager functions and workflow related to managing employees.

for Thomas Jefferson University
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EmpCenter® 16.3

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About This Guide

This guide supplements instructor-led classroom training as you learn the functions in EmpCenter Time & Attendance. The target audience is managers and timekeepers.

Objectives

In this course you will learn how to:

- Log in to EmpCenter and navigate through the application as a manager
- Edit employee timesheet information
- Review bank balances and pay calculations
- Approve and amend employee timesheets
- Process time-off requests
- Perform end-of-period activities as a manager
- Delegate privileges to others
- Generate reports

Conventions

This guide uses the following notational conventions:

- **Bold text** depicts tab labels, menu names, policy labels (**Pay Code** policy), function buttons (**Submit Timesheet** button), and computer keyboard keys (press **Enter**).
- **Bold text** and the right arrow symbol (**>**) depict hierarchical choices in menus.
- ***Bold italics*** represents field labels (***Status_Code_1*** field).
- `Shaded sans serif text represents program code or data.`

Bordered text depicts notes, cautions, or warnings.

EXAMPLE: Shaded text represents examples.

TIP: The image at left depicts helpful tips.

Note*: Some screen shots in this document represent common EmpCenter functions and may not exactly match those available to your role.*

Certification

The American Payroll Association (www.americanpayroll.org) has approved this program (course code #16WFS-007) for 3.5 recertification credit hours.

Comments

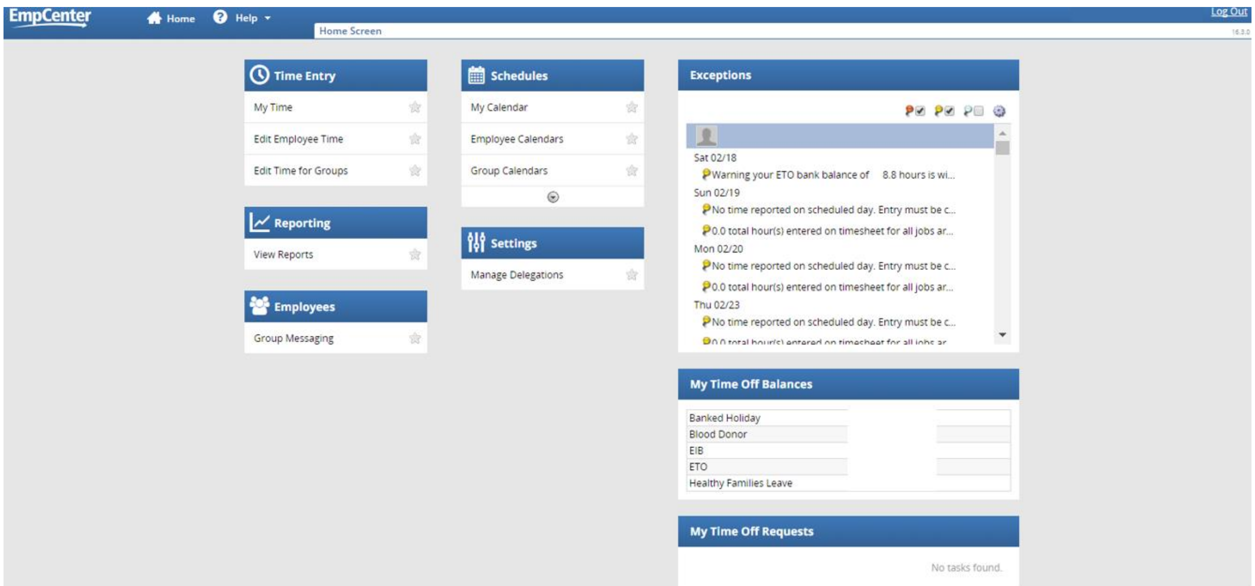
WorkForce Software is committed to the delivery of high quality and comprehensive training. If you have any feedback you wish to share about this document, please submit it to: wfstraining@workforcesoftware.com

Please include the following information in your email:

- Document title
- Topic title
- Experience level with the product (beginning, intermediate, advanced)
- Comments (including page numbers where applicable)

Lesson 1: The Manager Dashboard

The functions available on the EmpCenter dashboard depend on the user's role. The manager's dashboard offers functions not available to non-management employees to assist managers and timekeepers in handling the time and attendance data of their employees. Managers and timekeepers can use these options to perform such functions as editing and approving employee timesheets, assigning schedules, or reviewing employee time off requests. Your Home Screen layout and available functionality may vary depending on your role in the organization.



Manager Functions

The functions available on the dashboard are arranged in groups of related tasks called *areas*. Each area contains one or more links that you can use to access manager functions.

Time Entry

- **My Time-**: View, enter, or update timesheet data through the timesheet.
- **Edit Employee Time**: View and edit employee timesheets.
- **Edit Time for Groups**: Add and edit time entries for a group of assignments at once.
- **Approve Timesheets**: Approve timesheets for groups of employee assignments. Instead of approving timesheets individually, you can approve the timesheets for all employee assignments in a group.

Reporting

- **View Reports**: Generate general reports to view timesheet information for a certain period, delegated roles, or comments on timesheets.

Employees

- **Group Messaging**: Send messages to employees using email and/or text messaging.

Schedules

- **My Calendar**: Shows your personal calendar which displays events such as time off, pending time off, and holidays.
- **Employee Calendars**: Shows calendar for individual employees which displays events such as time off, pending time off, and holidays.
- **My Time Off**: Submit time off requests, track the status of your requests, and view the history of past requests.
- **Group Calendars**: Shows calendar for groups of employees which displays events such as time off, pending time off, and holidays.
- **Review Time off Requests**: Approve or reject employee time off requests.
- **Assign Schedules**: Assign schedules or schedule cycles to employees.
- **Manage Group Schedules**: Enables managers to add or edit schedules for an entire group of assignments at once. Managers should use this window for one-time schedule modifications.

Settings

- **Manage Delegations**: The roles for an assignment group can be delegated to another user who is at or below the group owner's role.

Exceptions

Lists exception messages that exist on your employees' timesheets. Messages are listed by employee and show the date the timesheet exception occurred.

My Time Off Balances

- **Banked Holiday**: The number of banked holiday hours that have been accrued and are available to use.
- **Blood Donor**: The number of time off hours that have been accrued and are available to use.
- **EIB**: The number of EIB hours available to use for an approved disability leave.
- **ETO**: The number of ETO hours that have been accrued and are available to use.
- **Healthy Families Leave**: This is the bank of hours available under the Philadelphia Sick Leave
- **Sick Hours**: The number of sick hours that have been accrued and are available to use.
- **Personal Time**: The number of Personal hours that have been accrued and are available to use.
- **Vacation**: The number of Vacation hours that have been accrued and are available to use.

My Time Off Requests

Shows upcoming time off requests that you have submitted.

My Employees' Time Off Requests

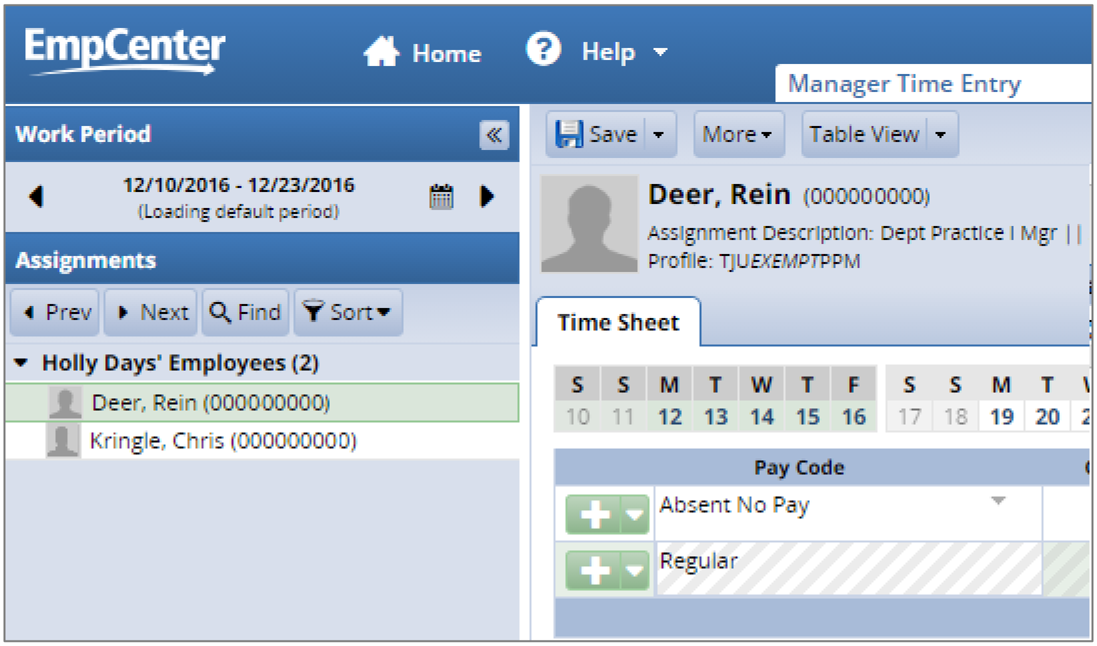
Shows employee time off requests that are pending your approval.

Employee Photographs

Your picture will appear next to your name in EmpCenter. Your employees' pictures will also appear on various screens.

Examples of where photographs may appear include:

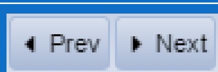
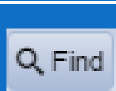
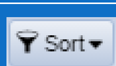
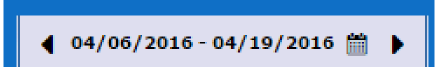
- Home Screen tasks, such as time entry screens
- Approvals
- Time Off Requests



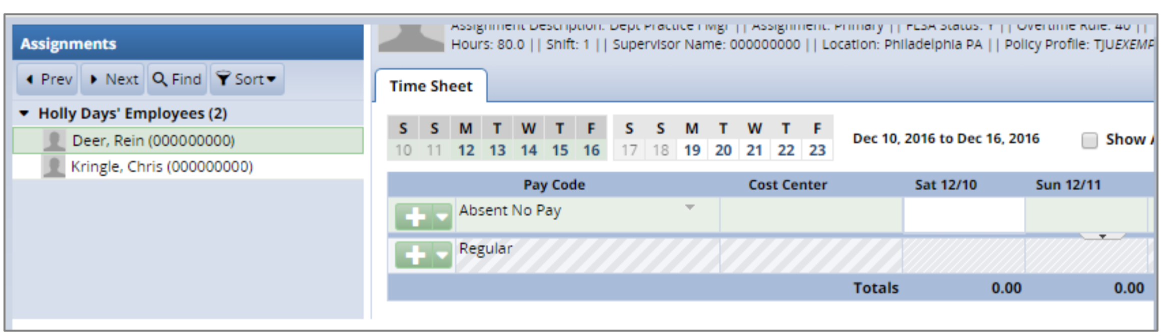
Lesson 2: Timesheet Components

When viewing and editing individual employee timesheets or schedules, the work area of the manager's window resembles the work area of an employee's window, and includes buttons that perform similar tasks.

Timesheet Window Buttons

Button	Button Function
	The **Minimize** button lets you hide the assignment tree. When hidden, the button toggles to a **Maximize** button.
	The **Prev** and **Next** buttons move you to the previous or next record available, respectively, based on your selection criteria.
	The **Find** button locates records based on a common set of search criteria. To sort your search results, click the top of any column in the **Find Employees** window.
	The **Sort** button arranges employee records in a specific order.
	The **Work Period** button, in Table and List view, displays the timesheet's period. In Day View, this button indicates the date displayed in the timesheet. This button opens a pop-up calendar from which you can select a pay period.

1. Click an assignment in the assignment tree on the left side of the window to reveal the group's employees.
2. Click a name to open the employee's timesheet.



Setting Date and Save Options

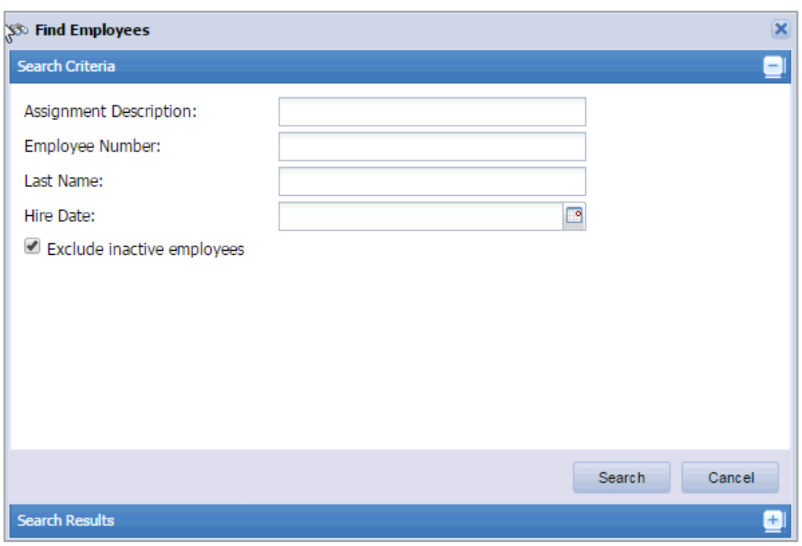
You can specify date and save options that help you locate and process employee timesheets or schedules more efficiently. The options you select remain valid for the current session only.

1. To set the date and save options, click the **Period Selector** button to access a pop-up calendar.
2. Select the period from the calendar by doing one of the following:
    - Click the date needed. The period containing that date appears.
    - Click the **Current Period** button to specify the current period.
    - Click the **Today** button to specify the period containing today's date. The selected period appears in yellow.
3. Click the arrow in the **Save** button to access its drop-down menu, and select what the system will do whenever you save an employee's timesheet. By default, the system saves just the employee's timesheet and performs no further action.
    - Select **Save and Find** to direct the system to save the employee's timesheet, then close it and open the **Find Employees** pop-up window.
    - Select **Save and Next** to direct the system to save the employee's timesheet, then close it, and display the timesheet of the next employee in the group.

Finding Timesheets

Use the **Find** button to quickly locate the timesheet for an employee or a set of employees based on specific search criteria.

1. Click the **Find** button to display the **Find Employees** pop-up window.



2. Enter your search criteria. For example, you can enter a last name or employee number. You can also use a character string and or the wildcard character (*) to retrieve a list of employees matching the characters you enter.
3. Click **Search** to find the records, or click **Cancel** to exit the window without searching.

When the search completes, the results expand within the **Find Employees** window and appear in a table. You can sort the search results by clicking the top of any column in the **Find Employees** window.

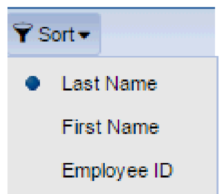
4. Click a row in the table to display the record for that employee. To refine your search, click the **Plus** button to expand **Search Criteria**, make any changes, and click **Search**.

Sorting Timesheets

Use **Sort** to specify the order in which to arrange records.

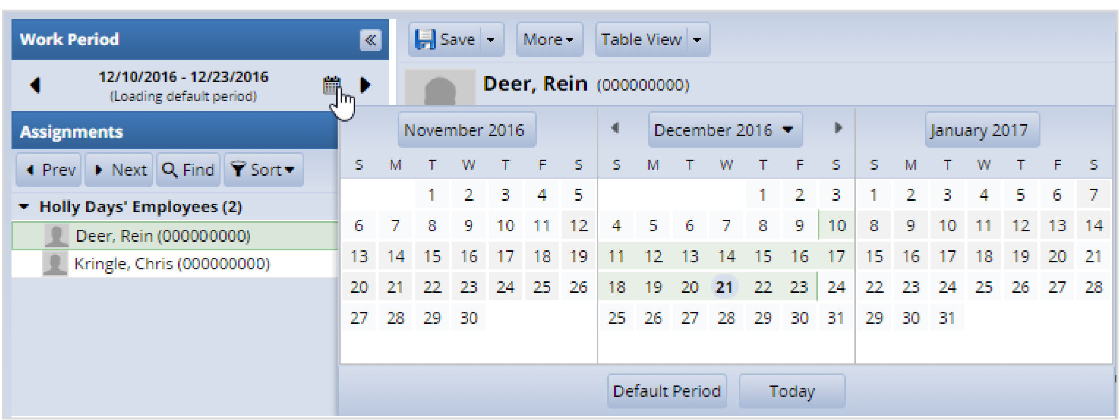
To sort records:

1. Click the **Sort** button to display the **Sort** drop-down list.
2. Select the method by which to sort the records.



Navigating Timesheets

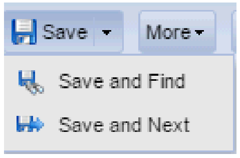
1. To select a pay period to view or edit, click the **Work Period** button to access the pop-up calendar, and select a pay period.
2. Click the **Minimize** and **Maximize** buttons to collapse or expand the left panel.



3. Press **Tab** or **Shift + Tab** to move between fields on the timesheet.
4. In the lower part of the employee's timesheet, click tabs to view employee information.

- Click the **Schedule** tab to display the employee's work schedule.
- Click the **Messages** tab to display system-generated messages related to the timesheet.
- Click the **Leave Balances** tab to view the employee's leave bank balances.
- Click the **Results** tab to view a pay summary of the timesheet.
- Click the **Attendance** tab to view the employee's attendance bank balances.

5. To print the timesheet, select **More > Print**.
6. Click **Save** to save any changes you make.



- Select **Save and Find** to save the timesheet and automatically open the **Find Employees** window.
- Select **Save and Next** to save the timesheet and automatically open the timesheet for the next employee in the group.

Lesson 3: Working with Employee Timesheets

Managers can work with employee timesheets in several ways, such as reviewing or editing time on the timesheet, selecting a different pay code, or reviewing and clearing exceptions. It is the manager's responsibility to confirm that employees' timesheets are error free, and then to approve them.

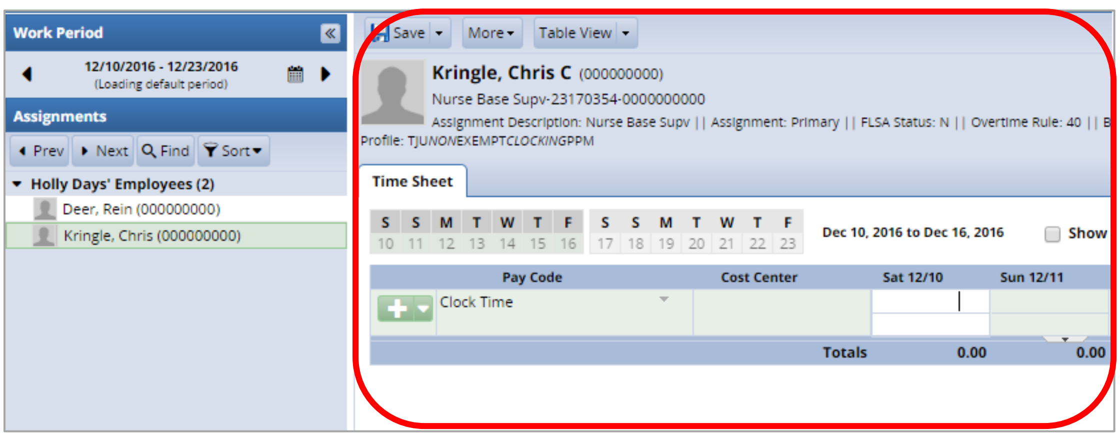
Editing Employee Time

The **Manager Time Entry** window enables you to:

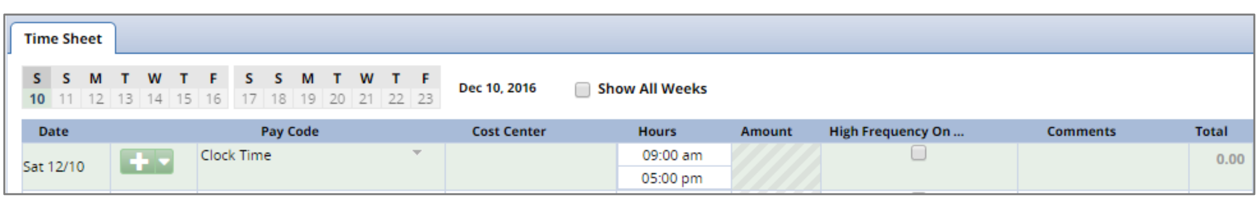
- Edit employee timesheets
- View an employee's time off balances and pay preview

To edit employee time:

1. On the Home Screen, select **Time Entry > Edit Employee Time**.
2. Select an assignment group if you have been delegated more than one group of employees.
3. Select an employee from that assignment group. The employee's timesheet appears.



Editing the timesheet for an assignment in the **Manager Time Entry** window is the same as working in your personal **Time Entry** window.



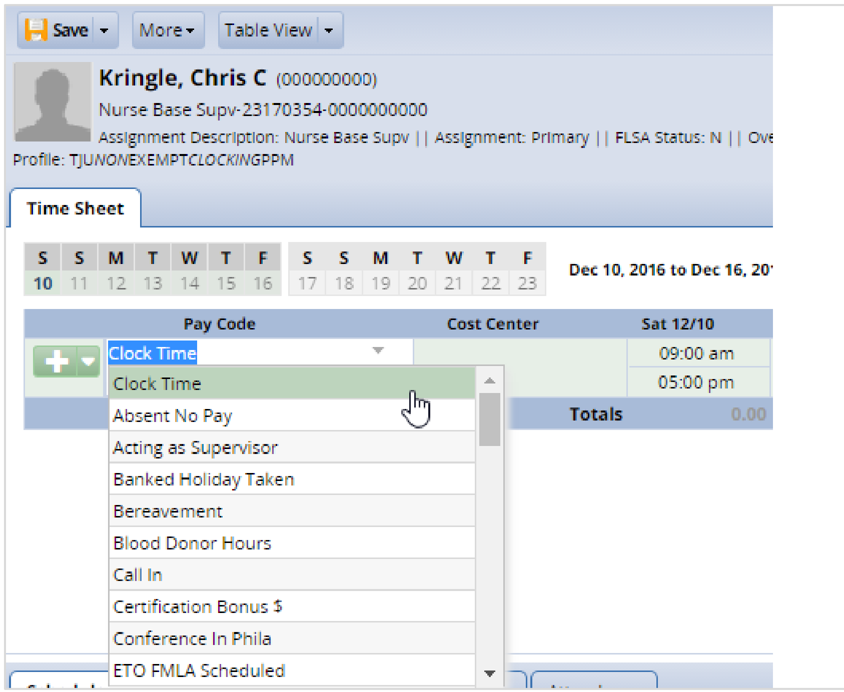
Using Pay Codes

A pay code is an entry-type identifier required for every transaction recorded on a timesheet or schedule. Each pay code has an entry type such as amount, elapsed time, or in/out time. Managers have access to certain pay codes which are unavailable to employees and can modify employee timesheets by selecting from a number of additional pay codes.

Pay codes such as Banked Holiday, Vacation or ETO will increase or decrease time off banks.

To change an employee's pay code:

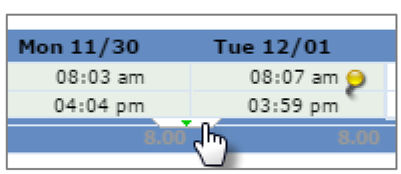
1. Open an employee's timesheet.
2. Select the appropriate pay code.



Entering Timesheet Details

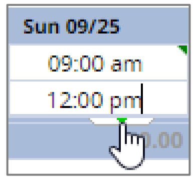
The **Comments** field can be used to enter details about a particular time entry. For example, you might want to add a comment if you select a rarely used pay code. In List View, comments readily display in the **Comments** field. In Table View, a **Comment Indicator** appears in the field associated with the comment.

1. In Table View, click the green triangle in the corner of a slice to display the **Comment** Indicator.
2. Click the **Comment** tab to expand and collapse the **Comments** field.

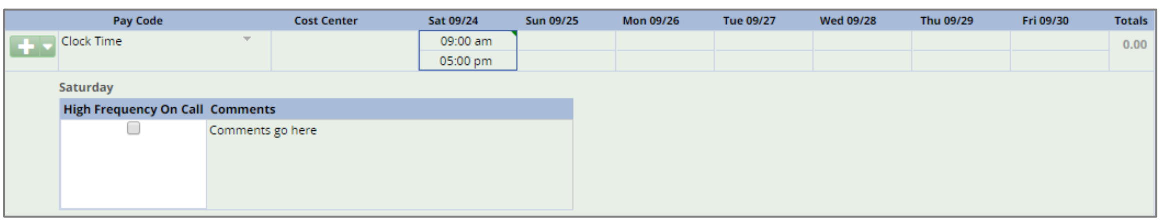


By default, when the **Comments** field contains data, the **Comment Indicator** and comment toggle are green. If the **Comments** field contains invalid data, such as an invalid date format or too many characters, the **Comment Indicator** is red.

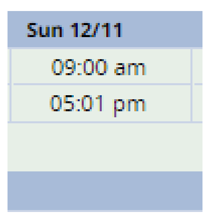
3. Click the **Comment** tab to expand or collapse the **Comments** field.

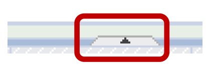


An alternative method is to press the **Shift + Enter** keys at the same time.



4. To hide the **Comments** field, click the **Comment** tab.





Exception Handling

An exception is a conflict noted between time and attendance information and the rules under which the timesheet is processed. Exceptions generate messages which appear in the **Messages** tab on the **Time Entry** window.

Some messages are informational and require no action; others require a satisfactory resolution before the timesheet can be successfully submitted. Error level exceptions must be corrected before the respective time is paid.

The **Messages** tab presents exceptions. Each exception shows the:

- Date of the exception
- Exception message describing the problem
- Severity of the exception (Informational, Error, or Warning)
- Any action which may be required

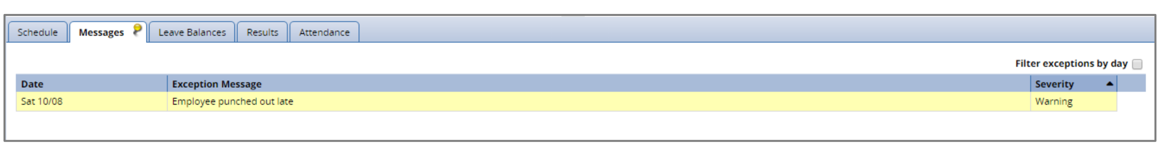
If a time entry has a related exception, a color-coded exception pin appears which, when clicked, displays the **Messages** tab. The exception messages are also color-coded to identify the level of severity, and sometimes the system is configured to automatically send email notification of the exception to you or another individual. To view exceptions for a specific day, select the **Filter exception by day** checkbox on the **Messages** tab.

- **White**: No exceptions or only informational messages present
- **Yellow**: Warnings present
- **Red**: Errors present

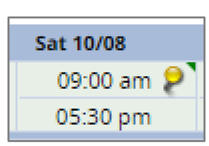
By default, exception messages are displayed in decreasing order of severity. The rank of severity codes, from lowest to highest, is as follows:

Severity Level	Field Options
Least Severe	No exceptions
	Informational message – no action required
	Informational message – action might be required
	Warning
	Warning – paid differently than entered
	Error – record not paid
Most Severe	Error – entire timesheet not paid or is being held

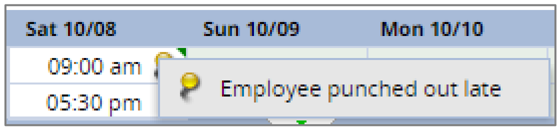
1. On the **Messages** tab, select any column header (**Date, Exception Message**, or **Severity**) to reorder the list.
2. Click the arrow next to the column name to select a different sort order.



Time entries associated with exceptions appear on the timesheet marked with a colored pin.



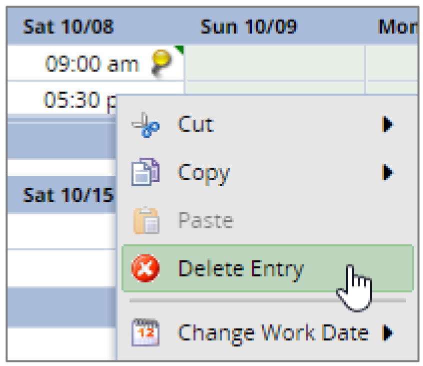
3. Click the pin to display the exception message.



Deleting a Time Entry

You can delete a row of time, a time transaction commonly called a slice, in Table View.

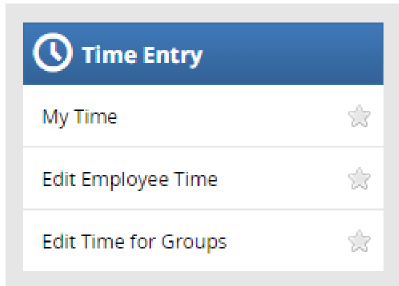
1. Switch to Table view, if necessary.
2. Select the time slice to delete.
3. Right-click and select **Delete Entry**.



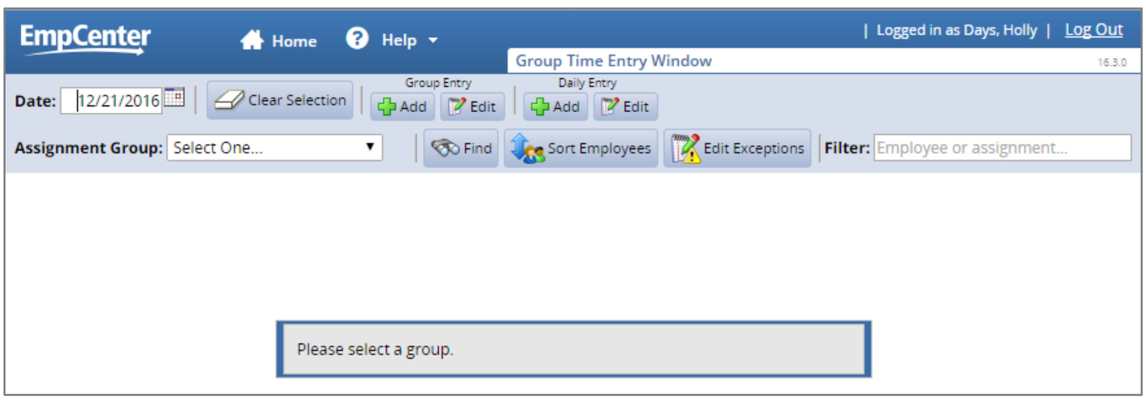
Group Time Entry

The **Group Time Entry** window enables managers to perform bulk time entry tasks for groups of employees. You can edit an entire or partial group of employees. For example, you can add a week of training to a group of employees in a division or add a holiday for an entire unit.

1. To display the **Group Time Entry** window, on the Home Screen, select **Time Entry > Edit Time for Groups**.

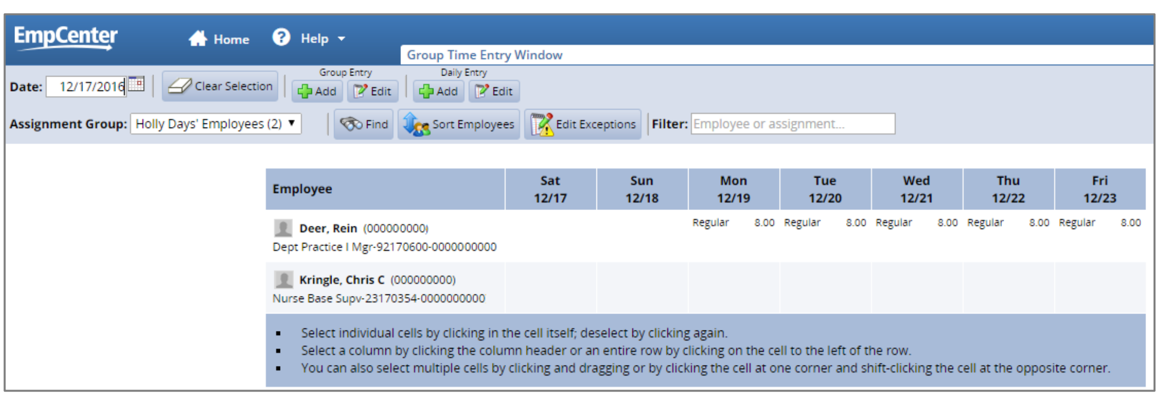


The **Group Time Entry** window appears. In this window, you can select and edit entries for multiple timesheets. The window also contains buttons for other tools.



2. To select group entries, select the appropriate assignment group from the **Assignment Group** drop-down menu.

After the information loads, a grid displays employee names, days, and dates.

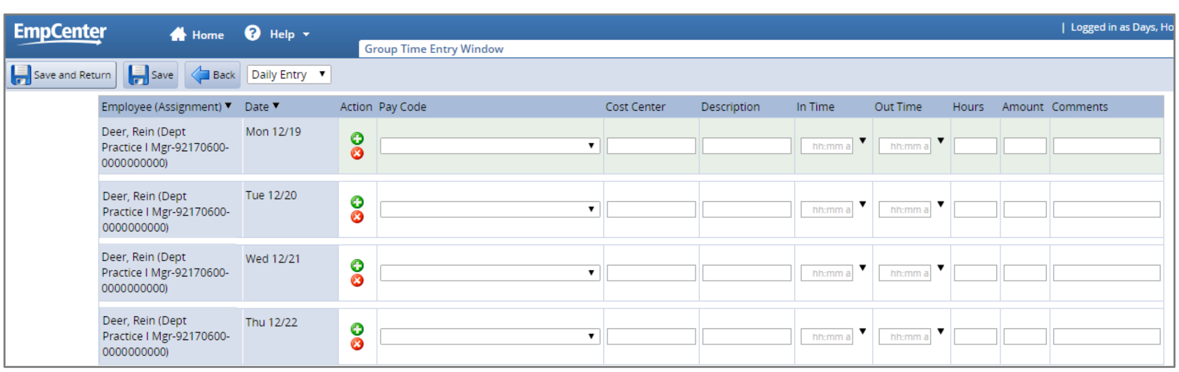


*For large groups, only the first 40 members display. Use the **Filter** field to refine your results.*

 Time entries associated with warning and error exceptions appear with a shaded background. Yellow indicates exception warnings, while red indicates error exceptions.

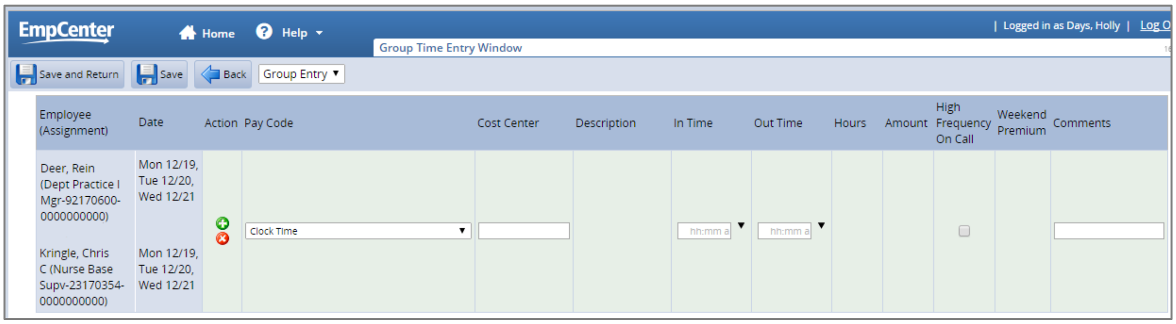
1. In most cases, the grid's default view displays the current pay period. To choose a different pay period, select a date that falls within that pay period by doing one of the following:
   - Enter a date in the **Date** field. Use one of the following formats: MM/DD/YY, MM/DD/YYYY, YY/MM/DD, or MM-DD-YY, including the slashes or dashes.
   - Alternatively, click the **Calendar** button (if available) and select a date. After selecting a new date, the grid automatically updates to that date.
2. Select entries to modify by clicking the appropriate cells in the grid.
   - To select all dates in the time period, click the cell containing the employee (assignment) name.
   - To select a specific date for all members in the group (such as a column), click the cell containing the date (the column header).
   - To select specific dates for specific members, click the cells you want to edit.
   - To select a range of cells, click the first cell in the range, and then press the **Shift** key while clicking the last cell in the range.
   - To select multiple concurrent cells, click a cell and drag the mouse across additional cells while holding down the mouse button.
   - Click the **Clear Selection** button to start over.
3. In the **Daily Entry** section at the top of the **Group Time Entry Window**, click the **Add** and **Edit** buttons to apply different changes to individual employees.

4. Edit the timesheet as you would in the **Manager Time Entry** window.

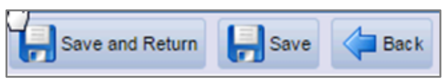


5. Use the drop-down menu to switch between **Daily Entry** and **Group Entry**.

6. In the **Group Entry** section at the top of the **Group Time Entry Window**, click the **Add** and **Edit** options to apply a single change to all employees.



7. After making all editing changes, click **Save and Return** to save the changes and return to the main **Group Time Entry Window**.



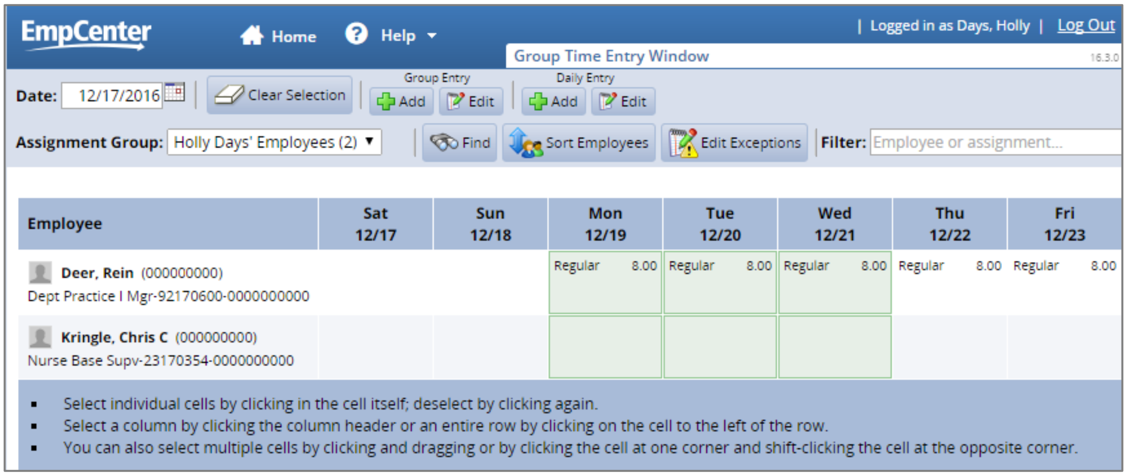
- Select **Save** to save changes and remain on the same page.
- Select **Back** to return to the main window without saving the changes.

8. To edit the assignments of employees in a different group, select a different group from the **Assignment Group** drop-down menu.

Adding and Editing Group Entries

You can add and edit entries for just a few records or a large number of records.

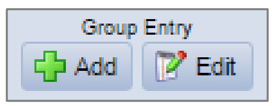
1. To add or edit group entries, select the cells to add or edit.



2. Choose the task and method to perform.

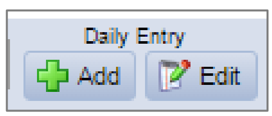
- In the **Group Entry** area, click **Add** or **Edit** to add or edit large groups of entries.

  This is a good choice when you have selected dates for entire groups of assignments.

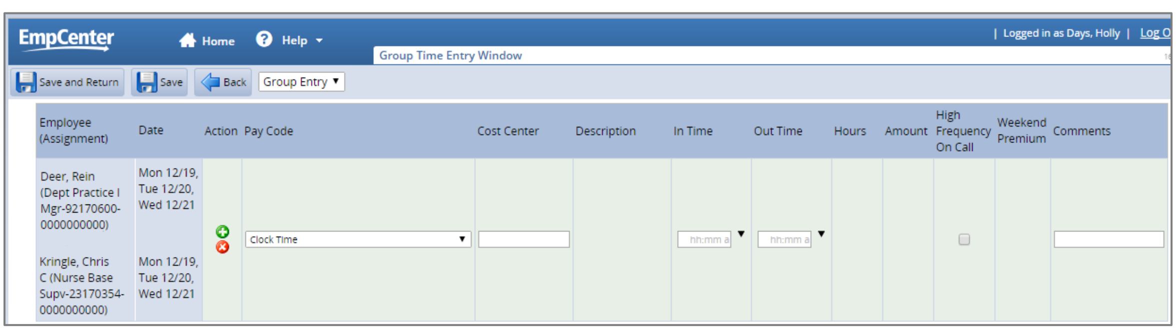


- In the **Daily Entry** area, click **Add** or **Edit** to add or edit daily entries.

  This is a good choice when you have selected just a few assignments or an individual assignment.

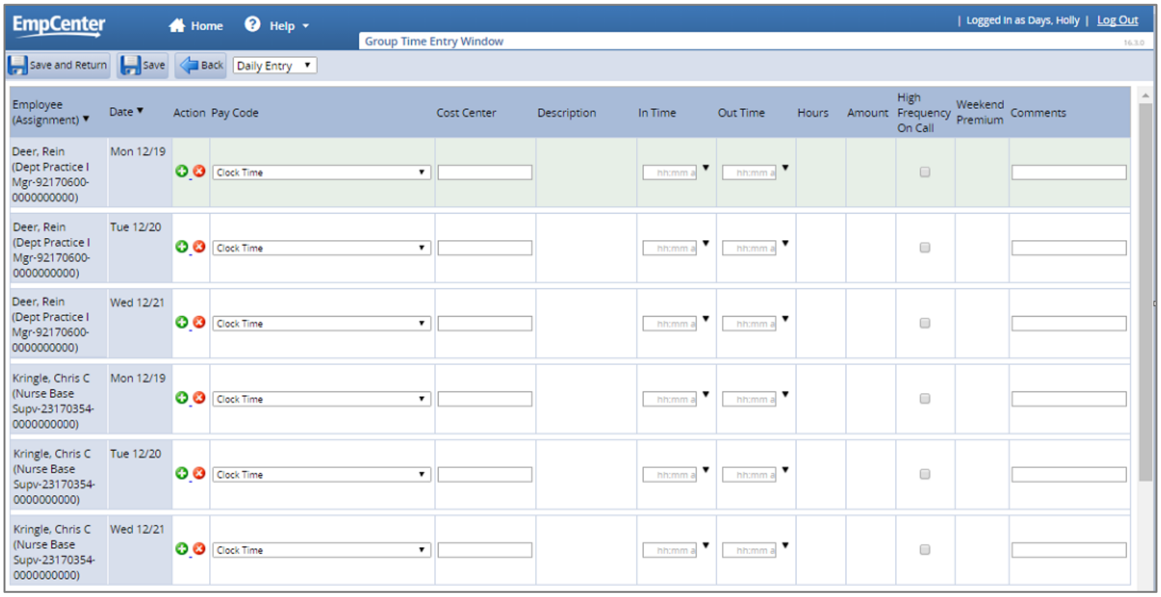


The **Group Time Entry** window opens in either **Group Entry** view or **Day** view.



When you select one or more assignments for editing, the window displays the pay code for the in and out times, and groups consecutive in and out times with the same pay code. In and out times are grouped even if there are gaps between them, provided the times are not separated by another in and out time with a different pay code.

For example, in the **Group Entry** view, the Regular pay codes are grouped together in one row, and the Overtime pay code is grouped in a different row, similar to the Table View in the **Time Entry Window**. The **Daily Entry** view lists each employee's worked days in a separate row, similar to the List View in the **Time Entry Window**.



3. Make the necessary changes or additions.

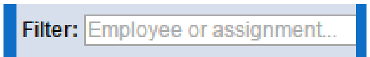
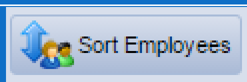
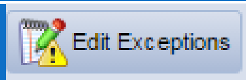
-  Click the **Insert** button to add time or schedule entries.
-  Click the **Delete** button to delete time or schedule entries.
- Press **Tab** or **Shift + Tab** to move between fields.

4. Save your work.

- Click the **Save** button to save your changes.
- Click the **Save and Return** button to save your changes and go back to the entry grid.
- Click the **Back** button to exit the window without saving your changes.

Using Other Group Time Entry Tools

In addition to the standard tools used for working with multiple entries, you can use the following options if your system has been configured to include them.

Button	Description
 Filter: Employee or assignment...	Retrieves a list of records matching a specific set of criteria. The filter searches all assignments to which you have access.
 Sort Employees	Arranges your records in a specific order.
 Edit Exceptions	Lets you take action on exceptions.

Filter Employees

1. To filter employees, enter your search criteria. For example, enter a last name, employee number, or hire date.
    - You can also use a character string and/or the wildcard character (*) to retrieve a list of assignments matching the characters you enter.
    - If you include a wildcard, use the **Max Results** field to limit the number of records displayed.
2. Click **Search** to find the matching records, or click **Cancel** to exit the pop-up window without searching.

Sort Employees

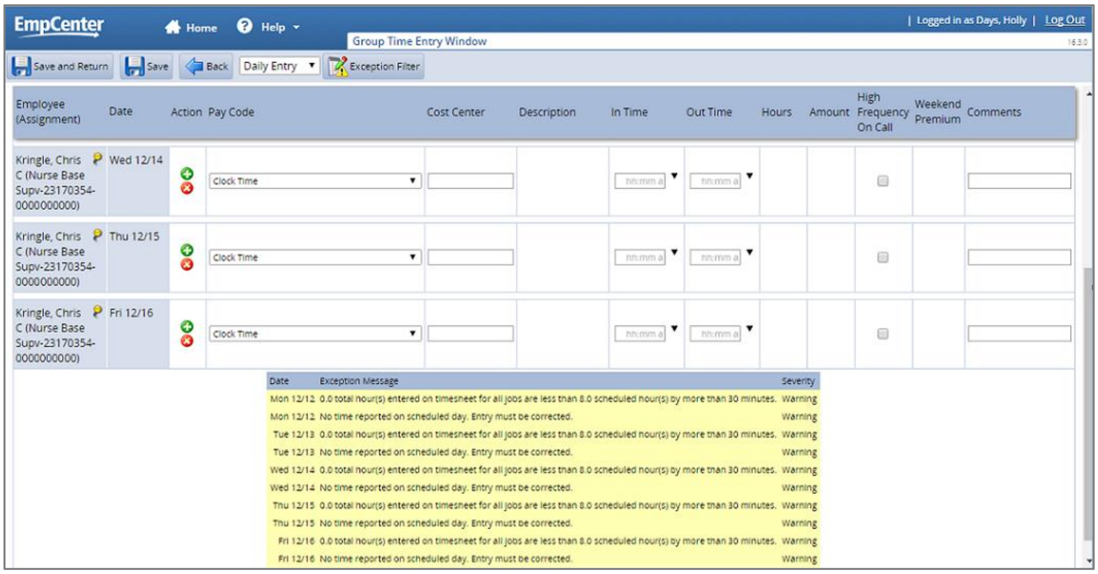
1. In the list of sort options, arrange the options in the order by which the records will sort. For example, you can sort first by hire date, then by last name.
2. Click **Sort** to use the sort hierarchy you have specified, or click **Close Window** to exit the pop-up window without sorting.

Edit Exceptions

1. Select exceptions to modify by clicking the appropriate cells in the grid.
    - To select all dates in the time period, click the cell containing the employee (assignment) name.
    - To select a specific date for all members in the group (such as a column), click the cell containing the date (the column header).
    - To select specific dates for specific members, click the cells you would like to edit.
    - Select a range of cells, click the first cell in the range, and then press the **Shift** key while clicking the last cell in the range.
    - To select multiple concurrent cells, click a cell and drag the mouse across additional cells while holding down the mouse button.
2. Click the **Edit Exceptions** button. A new window opens for addressing and resolving exceptions. Depending on your configuration, the appearance of this window can vary.

3. To select certain exception types, do the following:

   a. Click the **Exception Filter** button. The **Exception Filter** dialog box opens to let you select specific exceptions and to filter exceptions by severity level.



   b. From the **Minimum Exception Severity Level** drop-down list, select the lowest level exception you want to view or edit.
   c. In **Exception Codes**, select the specific exceptions you want to view or edit. By default, the system selects all exception codes.
   d. Select how to proceed with the exceptions:

      i. To save your changes, click **Save**. The **Exception Filter** dialog closes and the **Group Time Entry Window** displays the filtered results.
      ii. To display all exceptions, click **Reset to Default**. The **Exception Filter** dialog closes and the **Group Time Entry Window** displays unfiltered results.
      iii. To cancel any filter changes, click **Close Window**. The **Exception Filter** dialog closes and the **Group Time Entry Window** display does not change.

4. Make the necessary changes or additions.

   a. Click the **Insert** button to add time or schedule entries.
   b. Click the **Delete** button to delete time or schedule entries.
   c. Select the **Acknowledged** checkbox to acknowledge the exception.

5. Save your work.

   a. Click the **Save** button to save your changes.
   b. Click the **Save and Return** button to save your changes and go back to the entry grid.
   c. Click the **Back** button to exit the window without saving your changes.

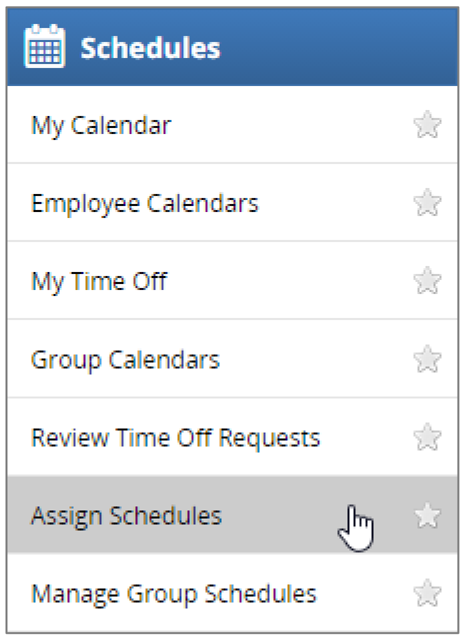
Lesson 4: Working with Schedules

There are a variety of ways to assign, develop, or edit schedules in EmpCenter. This lesson describes each of the methods that are available to you.

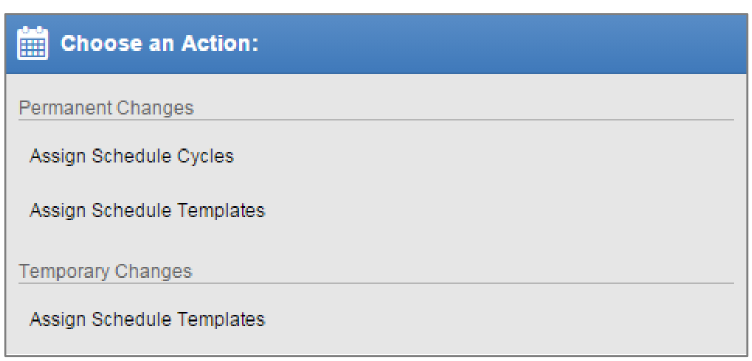
Standard Schedule Assignment

EmpCenter has a native scheduling functionality useful for those organizations who do not have very complex scheduling needs. Once schedules and schedule cycles (optional, for rotating schedule needs) have been created, managers can easily assign them to individuals or to groups of employees.

1. To assign either a permanent or temporary schedule template, on the Home Screen, select **Schedules > Assign Schedules**.



The **Assign Schedules** window appears.



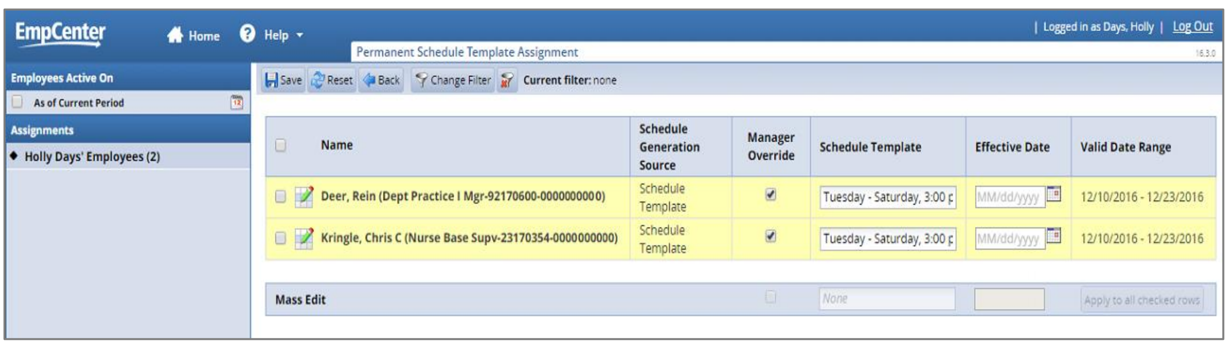
2. Choose an action:
    - In the **Permanent Changes** section, select **Assign Schedule Templates**.
    - In the **Temporary Changes** section, select **Assign Schedule Templates**.

Assigning Permanent Schedule Templates

An administrator may develop schedule templates for employees with work activities that follow a regular pattern from pay period to pay period. Managers can then assign the schedule template once and have it applied on a permanent basis to successive pay periods.

1. In the **Assign Schedules** window, in the **Permanent Changes** section, click **Assign Schedule Templates**.
2. Select an assignment group from the assignment tree on the left.
   A window appears listing the employees in the selected group.
3. Select the checkbox next to the name of the employee.

> ***Optional Step:*** *To apply the same values to more than one employee in the group, select the checkbox beside the name of particular employees or select the checkbox at the top of the* ***Name*** *field to select all assignments. Make all changes in the* ***Mass Edit*** *section at the bottom of the window.*



4. Select the **Manager Override** checkbox to make the **Schedule Template** field active.
5. From the **Schedule Template** drop-down list, select the correct schedule template.
6. Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.
    - The recommended best practice is to select the first date in the pay period whenever possible.
    - A second recommended best practice is to select the first date in the work week.

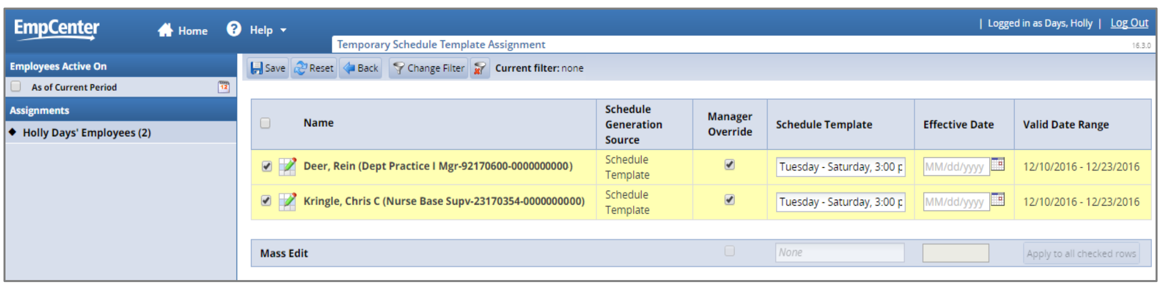
> ***Optional Step:*** *If making changes to more than one employee in the group, make all of the changes described in Steps 4 through 6 in the* ***Mass Edit*** *row at the bottom of the screen, and then click* ***Apply to all checked rows****.*

7. After completing your permanent schedule template assignments, choose how to proceed.
    - Click the **Save** icon to save your changes.
    - Click the **Reset** icon to clear your changes and start again.
    - Click the **Back** icon to return to the **Assign Schedules** window without saving your changes.

Assigning Temporary Schedule Templates

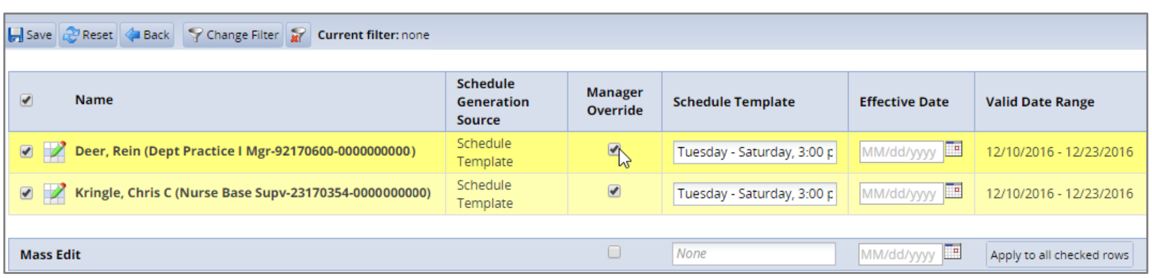
An administrator may develop schedule templates for employees to follow on a temporary basis, for example, within a specific pay period or for a limited length of time. Managers can then assign the schedule template on an "as needed" basis.

1. In the **Assign Schedules** window, in the **Temporary Changes** section, click **Assign Schedule Templates**.
2. Select an assignment group from the assignment tree on the left. A window appears that lists the employees in the selected group.
3. Select the checkbox next to the name of the employee.



> ***Optional Step:*** *To apply the same values to more than one employee in the group, select the checkbox beside the name of particular employees or select the checkbox at the top of the* ***Name*** *field to select all assignments. Make all changes in the* ***Mass Edit*** *section at the bottom of the window.*

4. Select the **Manager Override** checkbox to make the **Schedule Template** field active.



5. From the **Schedule Template** drop-down list, select the correct schedule template.
6. Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.

- The recommended best practice is to select the first date in the pay period whenever possible.
- A second recommended best practice is to select the first date in the work week.

> ***Optional Step:*** *If making changes to more than one employee in the group, make all of the changes described in Steps 4 through 6 in the* ***Mass Edit*** *row at the bottom of the screen and then click* ***Apply to all checked rows****.*

7. After completing your temporary schedule template assignments, choose how to proceed.

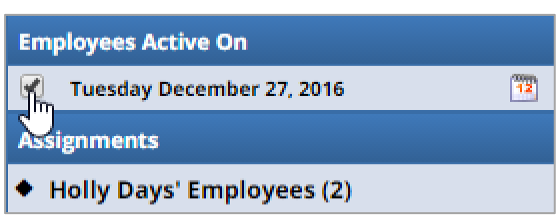
- Click the **Save** icon to save your changes.
- Click the **Reset** icon to clear your changes and start again.
- Click the **Back** icon to return to the **Assign Schedules** window without saving your changes.

> *Schedule assignments using this method will remain in effect for exactly one pay period. After that, the employee will revert back to his or her normally assigned schedule.*

Assigning Schedules to Dates Outside of Current Pay Period

Managers can schedule employees for assignments to dates outside of the current pay period. Examples are employees with schedules different from other assignments, or for employees who will be temporarily working on a project or schedule that is outside of their normal duties.

1. To assign either a permanent or temporary schedule template, on the Home Screen, select **Schedules > Assign Schedules**.
2. In the **Assign Schedules** window, in the **Permanent Changes** section, select **Assign Schedule Templates**.
3. Click the checkbox below **Employees Active On** and select the week you want to assign from the calendar. The range in the **Valid Date Range** column at the right of the screen will change to a pay period that includes the week you just selected.

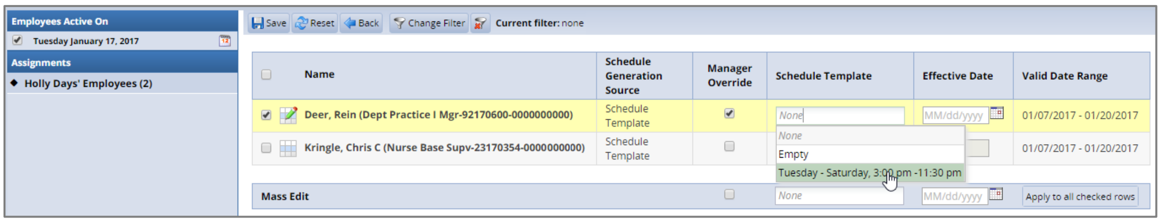


4. Select an assignment group from the assignment tree on the left. A window appears that lists the employees in the selected group.

5. Select the checkbox next to the name of the employee.

> ***Optional Step:*** *To apply the same values to more than one employee in the group, select the checkbox beside the name of particular employees or select the checkbox at the top of the* ***Name*** *field to select all assignments. Make all changes in the* ***Mass Edit*** *section at the bottom of the window.*

6. Select the **Manager Override** checkbox to make the **Schedule Template** field active.
7. From the **Schedule Template** drop-down list, select the correct schedule template.



8. Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.
   - The recommended best practice is to select the first date in the pay period whenever possible.
   - A second recommended best practice is to select the first date in the work week.

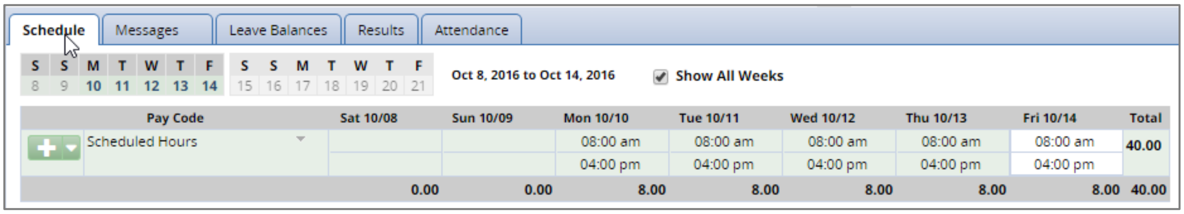
> ***Optional Step:*** *If making changes to more than one employee in the group, make all of the changes described in Steps 4 through 6 in the* ***Mass Edit*** *row at the bottom of the screen, and then click* ***Apply to all checked rows****.*

9. After completing your permanent schedule template assignments, choose how to proceed.
   - Click the **Save** icon to save your changes.
   - Click the **Reset** icon to clear your changes and start again.
   - Click the **Back** icon to return to the **Assign Schedules** window without saving changes.

Edit an Assigned Schedule

Employees are occasionally asked to deviate from their normal schedule for a very short amount of time, perhaps a single day or one week. When that happens, it can be easier to change the schedule from the **Manager Time Entry** window. This method works well for assignments with schedules that are different than most other assignments or for employees who temporarily work on a project or schedule outside of their normal duties.

1. On the Home Screen, select **Time Entry > Edit Employee Time**.
2. Select an assignment group.
3. Select an employee to develop individual schedules for employee assignments.
4. In the **Manager Time Entry** window, click the **Schedule** tab.



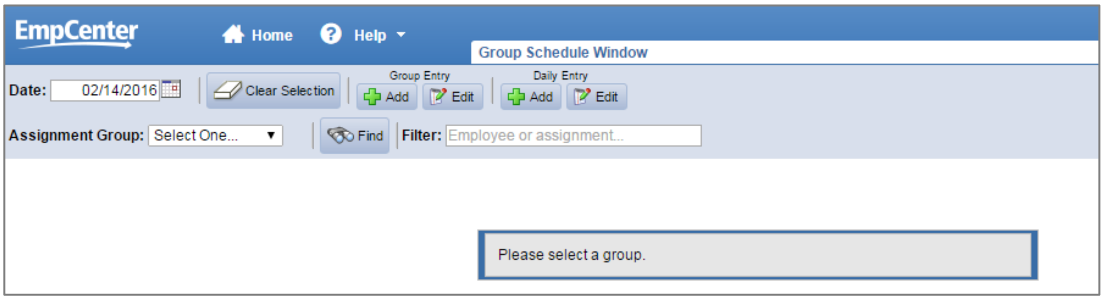
Schedule changes using this method will remain in effect only for the dates affected. After that, the employee will revert back to his or her normally assigned schedule.

Group Schedule Entry

Group Schedule entry lets managers add and edit schedules for an entire group of assignments at once. Managers should use this window for one-time schedule modifications, and not for recurring or temporary changes.

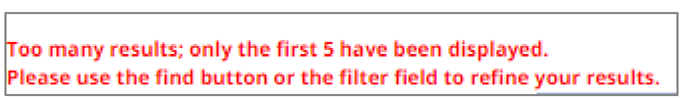
1. On the Home Screen, select **Schedules > Manage Group Schedules**.

   The **Group Schedule Window** appears.



2. To select or edit schedule entries for multiple employees, select an assignment group from the **Assignment Group** drop-down menu. A grid displays employee names, days, and dates.

3. The maximum number of assignments displayed in the grid depends on the maximum number defined by your system administrator. If an assignment group exceeds the maximum number allowed for display, a message appears above the grid.



4. In most cases, the default view displays the current pay period. To choose a different pay period, select a date that falls within that pay period by doing one of the following:

   - Enter a date in the **Date** field using one of the following formats: MM/DD/YY, MM/DD/YYYY, YY/MM/DD, or MM-DD-YY, including the slashes or dashes.
   - Click the **Calendar** button and select a date.

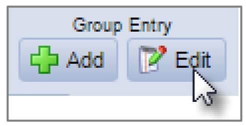
5. After selecting a new date, the grid automatically updates to that date.
6. Select entries to modify by clicking the appropriate cells in the grid.

   - To select all dates in the time period, click the cell containing the employee name.

- To select a specific date for all members in the group (such as a column), click the cell containing the date (the column header).
- To select specific dates for specific members, click the cells you need to edit.
- To select a range of cells, click the first cell in the range, and then press the **Shift** key while clicking the last cell in the range.
- To select multiple concurrent cells, click a cell and drag the mouse across additional cells while holding down the mouse button.

7. If you make a mistake or need to start over, click the **Clear Selection** button.
8. To edit the assignments of employees in a different group:

    a. Select a different group from the **Assignment Group** drop-down menu.
    b. In the **Group Entry** area, click **Edit**. The **Group Schedule Window** appears.



9. Make the necessary changes.

    - Click the **Insert** button to add time or schedule entries.
    - Click the **Delete** button to delete time or schedule entries.

10. Press **Tab** or **Shift + Tab** to move between fields.
11. Save your changes:

    - Click the **Save** button to save your changes and continue.
    - Click the **Save and Return** button to save your changes and go back to the entry grid.
    - Click the **Back** button to exit the window without saving your changes.

Lesson 5: Other Manager Functions

Managers have responsibilities to perform other tasks in EmpCenter, such as approving time off requests or approving timesheets. In this lesson, you will learn about each of the additional functions.

End-of-Period Reminders

At the end of each pay period managers will review and approve employee timesheets using the Approve Timesheets function.

Reminders are sent to remind managers to approve employee timesheets. Reminders are sent only to managers who have not approved all of their employee timesheets. The following table shows the reminders which will be sent to managers.

Date/Time	Sent to	Message
First Friday of pay period at 8:00 am	All hourly managers	The following employee timesheets need review: *Employee names and pay period end date will be listed
Second Friday of pay period at 8:00 am	All hourly managers	The following employee timesheets are not approved: *Employee names and pay period end date will be listed
Approval Monday at 8:00 am	All hourly managers	This is your second reminder. The following employee timesheets are not approved: *Employee names and pay period end date will be listed

Approving Timesheets

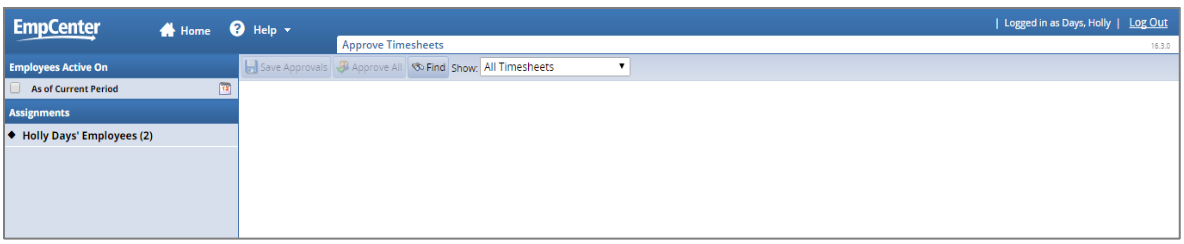
Managers can approve hours for individual employees or for an entire group. When you review employee hours, the system allows you to see whether an employee's timesheet contains any exception messages.

Timesheets with errors need attention before approval. You can choose to open and edit timesheets to correct any condition causing an exception, to reject timesheets and direct employees to correct them, or approve them despite exceptions. If there is a mixture of error-free timesheets and timesheets with exceptions, you have the option of approving the error-free timesheets immediately. The primary focus of approving or rejecting hours is to correct timesheets to eliminate exceptions.

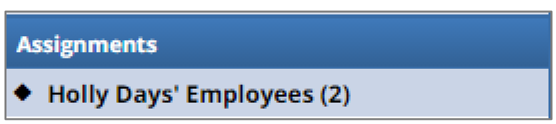
To approve or reject employee time:

1. On the Home Screen, select **Time Entry > Approve Timesheets**.

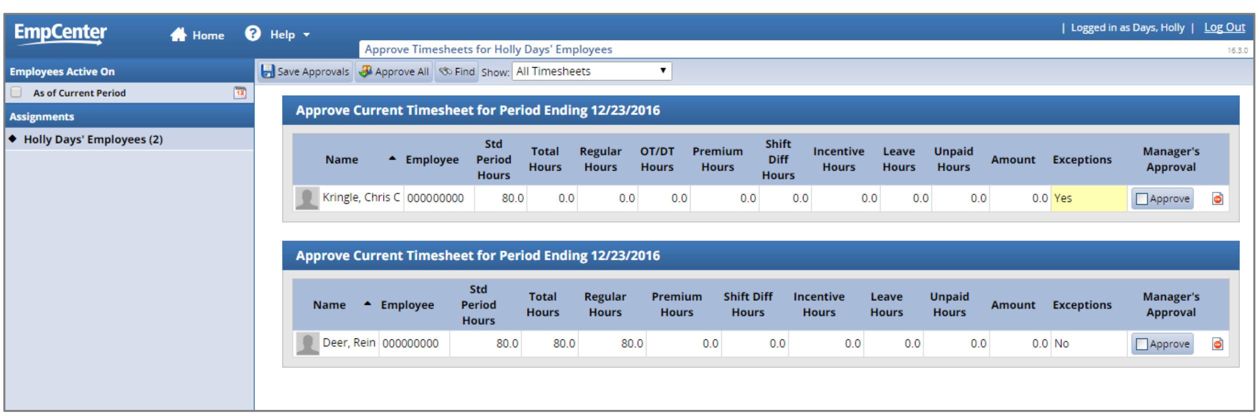
   The **Approve Timesheets** window appears.



2. From the assignment tree, select the group for which you want to approve or reject hours.



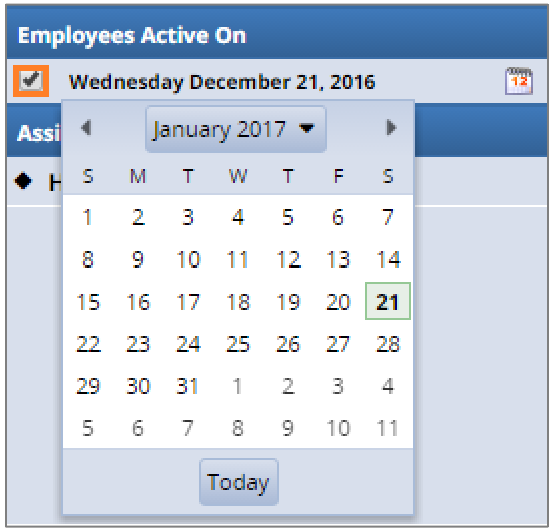
The **Approve Current Timesheets** window appears. The names of the employees in the group populate the main window.



3. You can view an employee's timesheet by clicking on the row of the respective employee.

4. To view timesheets ending on a different date than the default (the current date), do the following:

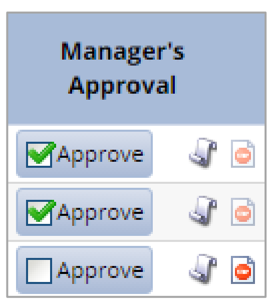
   a. Select the checkbox in the **Employees Active On** field. A pop-up calendar appears.



   b. Select a different date. The window updates with timesheet information for the period containing the date you selected.
   c. To return to the current date, clear the checkbox in the **Employees Active On** field.

5. To approve employee timesheets, do the following:

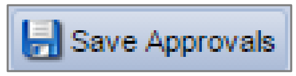
   a. Approve the employee hours. To approve an individual employee's hours, select the **Approve** checkbox in the **Manager's Approval** field. The **Approve** button for an accepted timesheet includes a green check mark.



   This is a toggle; you can click it again to undo the approval.

   b. If the timesheet data indicates that all timesheets have been submitted without any errors or exceptions that will prevent you from approving them, you can approve them at once using the **Approve All** button.
   c. If the timesheet data indicates a mixture of error-free timesheets and timesheets with exceptions, you can approve the error-free timesheets immediately by checking the box for **Manager's Approval**. Of course, you may choose to correct all timesheet errors first, and then approve all employees at once.

6. Click **Save Approvals**.



The hours for the applicable employees are saved for the specified work period. When employees access their timesheet for that work period, a note appears informing them that the hours have been approved. They will not be able to enter changes to their timesheet for that work period.

Amending Timesheets

Managers can amend timesheets for past pay periods for employees in assignment groups delegated to them. How far back in the past amendments are permitted is determined by your organizational rules and can differ by role. Common limits are shown in the table.

Role	Limitation
Timekeeper	28 days
Manager	1 year
Payroll Administrator	3 years

- Data from amended timesheets are not included in reports unless the amended timesheet has been approved or approved and locked.
- Amended timesheets must be approved by a manager, or a higher role, to be included in end of period processing and paid.
- Any changes made to a timesheet that has already been paid will cascade through all timesheets up through the current pay period. The difference will be applied to the current pay and bank balances.
    - If you amend a past timesheet to account for a vacation day that that was entered as a work day, then that change – because it affects the vacation bank – is used to recalculate the bank balances for each successive timesheet up through the current pay period.

To amend a timesheet:

1. Click the **Amend** button for the timesheet in the pay period that needs to be modified.

2. The timesheet opens for edits. Edit, and then **Save** the timesheet. The **Other Versions** button appears.

3. Click the **Other Versions** button. The **Timesheet Versions** window appears.
4. Click **View This Version** to display the original version of the timesheet.
5. Click **Compare To Open Version** to list the differences between the two versions. A pop-up window displays the results of the comparison.
6. After viewing the comparison, you can print the results, or close the window to return to the timesheet.

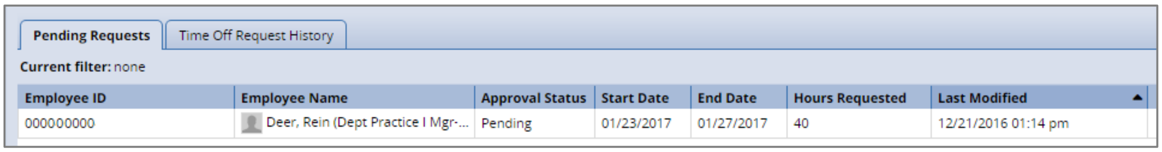
Approving Time Off Requests

When an employee submits a time off request, the request is forwarded to the employee's manager for review. The manager can then approve or reject the request.

To view a list of the time off requests that employees have submitted:

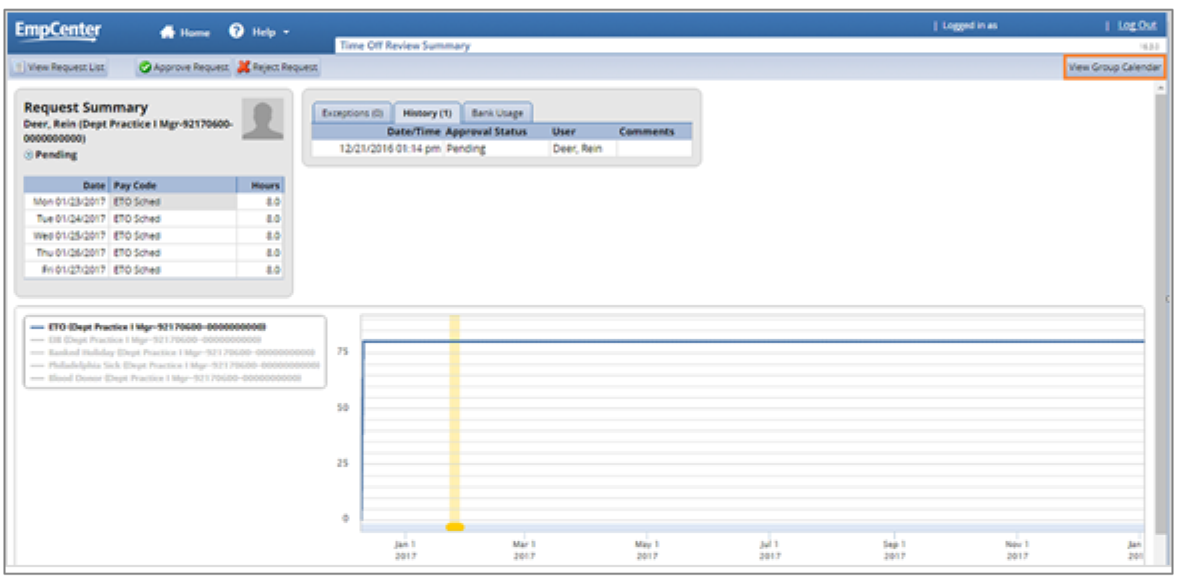
1. On the Home Screen, select **Schedules > Review Time Off Requests.**

   The **Time Off Review Summary** window appears listing pending requests, if any, and a history of past requests.

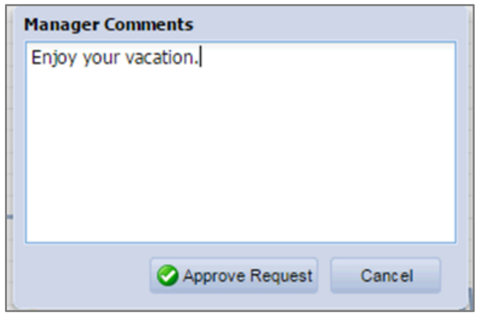


2. Select an employee. The request for that employee appears, including the hours requested, remaining bank balances, and history of the request.

   Notice that the **Request Summary** window includes a link to the **Group Schedule** window, which enables you to ensure that staffing needs will be met during the time period affected by the request. The **Group Schedule** window also displays any other time off requests already approved.



3. In the **Time Off Request Summary** window, click **Approve Request**.
4. In the **Manager Comments** dialog, add any comments about the request to the employee, and then click **Approve Request**.

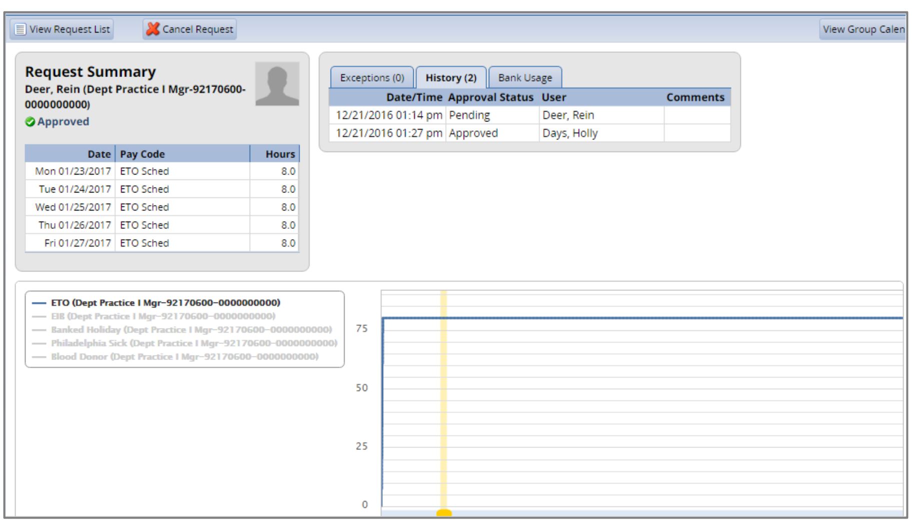


5. Click **OK** in the Status dialog.
6. In the **Time Off Review Summary** window, which automatically appears after a time off request is successfully approved or rejected, click the **Time Off Request History** tab. Notice that the request you just approved is listed here.

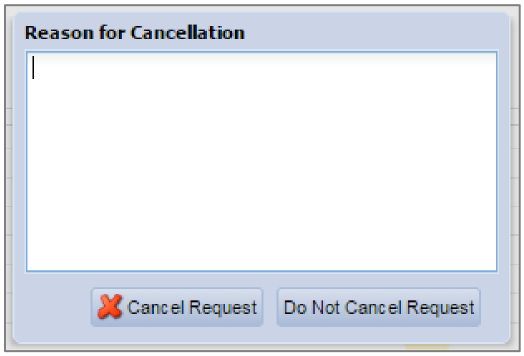
Cancelling an Approved Time-Off Request

1. To cancel an approved time off request, select a request from the **Time Off Request History** tab.

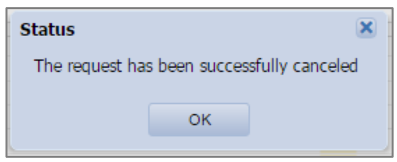
   The **Request Summary** window appears.



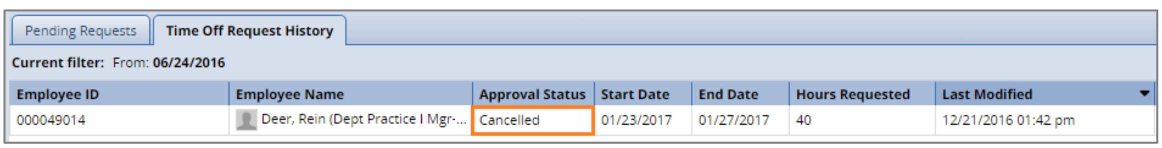
2. Click **Cancel Request**. The **Reason for Cancellation** window appears.



3. Enter a reason for cancellation, if necessary. The cancellation is in effect after you select **Cancel Request**. A confirmation message displays.

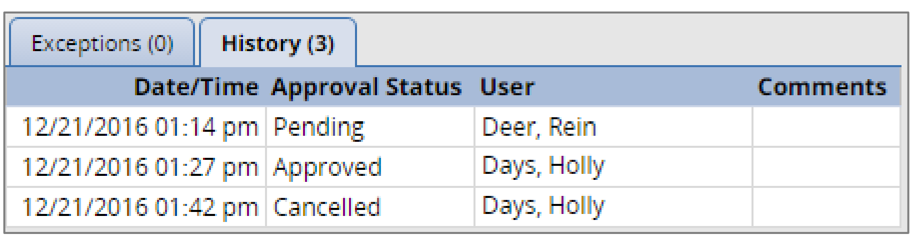


4. On the **Time Off Request History** tab, notice that the approval status has changed "Approved" to "Cancelled".



Employee ID	Employee Name	Approval Status	Start Date	End Date	Hours Requested	Last Modified
000049014	Deer, Rein (Dept Practice I Mgr-...	Cancelled	01/23/2017	01/27/2017	40	12/21/2016 01:42 pm

5. Click the cancelled request to see a detailed history of the request.



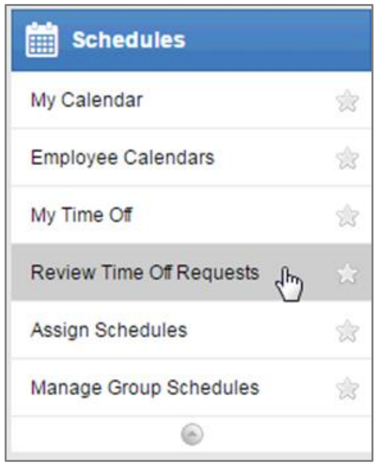
Date/Time	Approval Status	User	Comments
12/21/2016 01:14 pm	Pending	Deer, Rein	
12/21/2016 01:27 pm	Approved	Days, Holly	
12/21/2016 01:42 pm	Cancelled	Days, Holly	

Viewing the Group Calendar

The group calendar is available from the **Time Off Review Summary** window and allows a manager to view the pending and approved time off requests of all their delegated employees in one convenient monthly calendar.

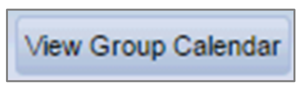
To access the **Time Off Review Summary** window:

1. On the Home Screen, select **Schedules > Review Time Off Requests**.

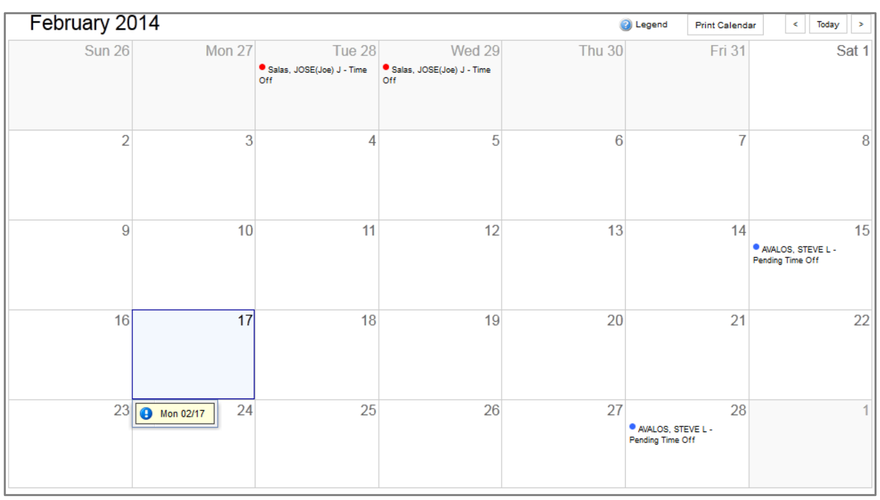


   The **Time Off Review Summary** window appears and lists any pending time off requests.

2. Click **View Group Calendar** in the upper right of the window.



   The **Group Calendar** window appears, showing approved and pending time off.



Viewing Time Off Requests from the Group Calendar

1. In the Group Calendar, click a pending time off request.
2. In the menu, select **View Pending Time Off Request**.

Approving Pending Time Off Requests from the Group Calendar

1. In the Group Calendar, click a pending time off request.
2. In the menu, select **View Pending Time Off Request**.
3. In the **Request Summary** window, click **Approve** or **Reject** the time off request.

Delegation

Delegation is the act of granting another member of the organization authority over a group of employees (an assignment group) when the typically assigned person is not available. For example, a manager going on vacation for a week can delegate authority over his or her employees to another manager to ensure timesheets are reviewed and approved in his or her absence.

A user can delegate an assignment group and grant the delegation recipient his or her role or, in some cases, a lower role to define the delegation recipient's access to the group. When delegating, the owner can delegate only those roles that are at or below the owner's role for the group. For example, someone with manager role for a group cannot delegate the Administrator role to others.

.

When you delegate responsibility for an assignment group to another user, you can only delegate the set of responsibilities associated with your own user role, and optionally "lower" roles in the user role hierarchy.

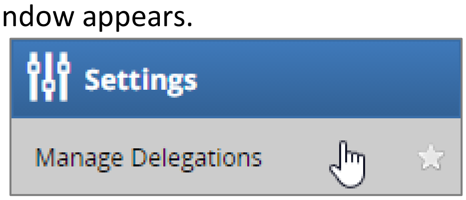
Roles which can be delegated will be defined as follows:

Role	Roles which can be delegated
Timekeeper	Timekeeper
Manager	Manager
Display and Reporting	None, cannot delegate
Grant Administrator	None, cannot delegate
Leave Administrator	None, cannot delegate
Payroll Administrator	None, cannot delegate
System Administrator	None, cannot delegate
Superuser	None, cannot delegate
Delegator	All

To delegate roles:

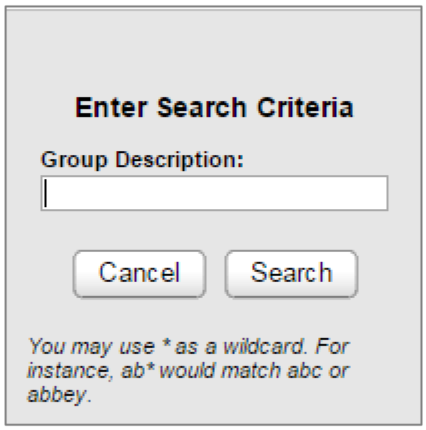
1. On the Home Screen, select **Settings > Manage Delegations.**

   The **Manage Delegations** window appears.

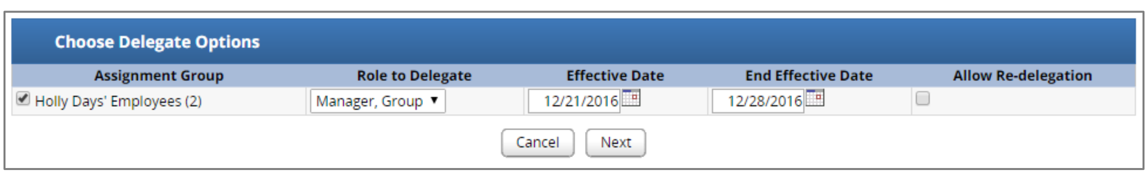


2. Click **Delegate Authority**. The **Enter Search Criteria** window appears which lets you search for one or more assignment groups.

3. Enter your search criteria. You can enter a character string and/or the wildcard character (*) to retrieve a list of groups matching the characters you enter.



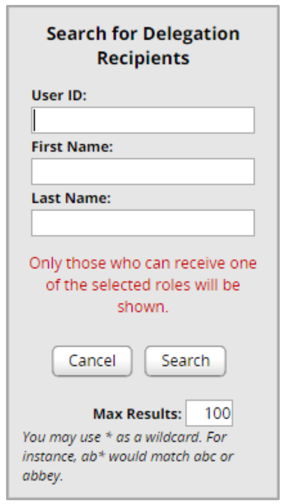
4. Click **Search**. A window lists the assignment groups matching your search, along with the roles you are granted for each group.



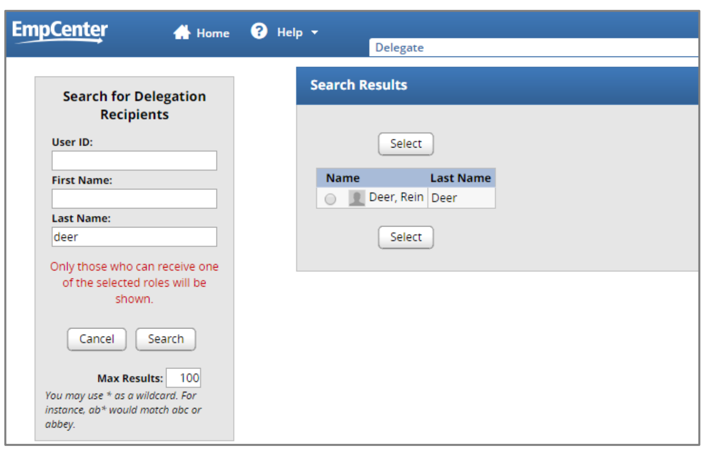
5. For each assignment group being delegated, choose your delegation options.
   - In the **Assignment Group** column, select the checkbox next to the assignment group name.
   - In the **Role to Delegate** column, use the drop-down menu to select the roles to be delegated for the assignment group.
   - In the **Effective Date** and **End Effective Date** columns, enter the dates during which the assignment group roles will be delegated.
     - **Effective Date** defaults to today.
     - **End Effective Date** defaults to one week from today. To make a delegation permanent, enter an **End Effective Date** of 12/31/3000.

- If you are delegating many groups and entering many dates, you can omit the slashes. The system will insert them for you as you exit the date fields.

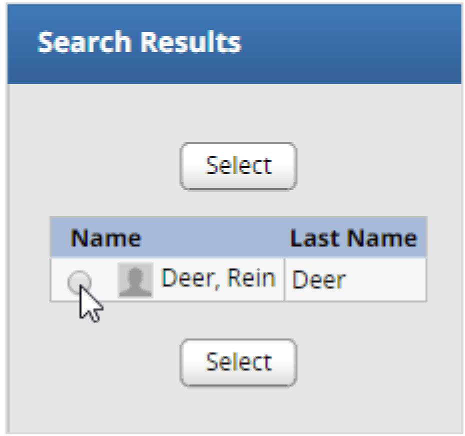
6. Click **Next** to display a search window for selecting the user who will be delegated that assignment group.
7. In the search window, enter your search criteria. You can also use a character string, the wildcard character (*), or a combination to retrieve a list of users matching the characters you enter. If you are including a wildcard, use the **Max Results** field to limit the number of displayed records.



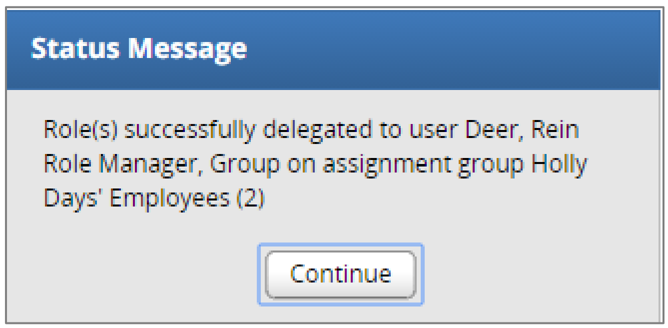
8. Click **Search**. A window appears with the results of the search.



9. Select a delegate.



10. Click **Select**. A confirmation message appears that indicates a successful delegation.



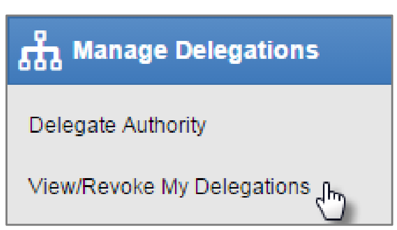
> ***Note**: If any delegations fail, a status message appears listing the unsuccessful delegations and why they failed. For example, a delegation could fail because the assignment group is already delegated to the selected delegate.*

11. Click **Continue** to return to the **Manage Delegations** window.

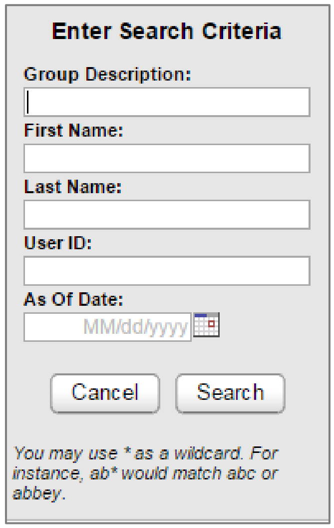
Cancelling or Revoking a Delegated Role

Once an owner has delegated a role, that owner can also cancel the delegation.

1. On the Home Screen, select **Settings > Manage Delegations**.
2. In the **Manage Delegations** dialog box, click **View/Revoke Delegations**.

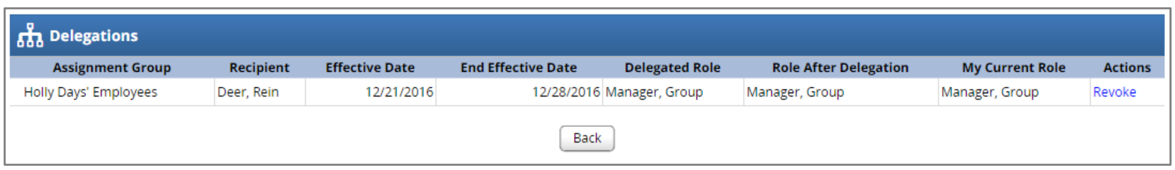


The **Enter Search Criteria** window appears.



3. Enter your search criteria.

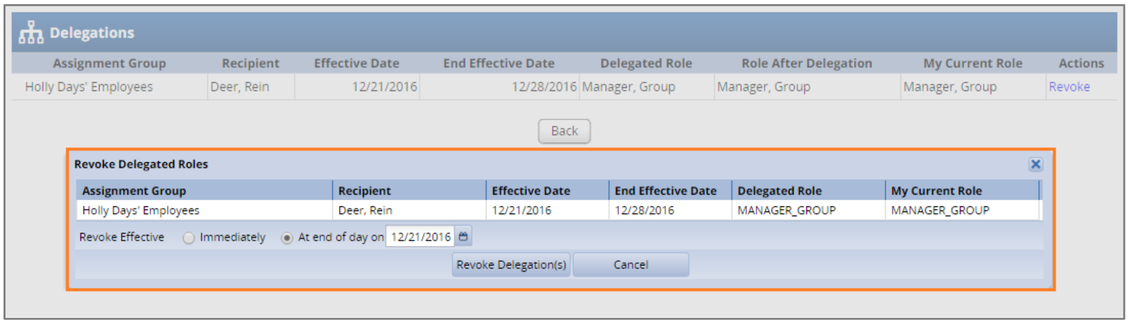
   A window appears that lists the roles currently delegated within your assignment groups, along with your role for each group.



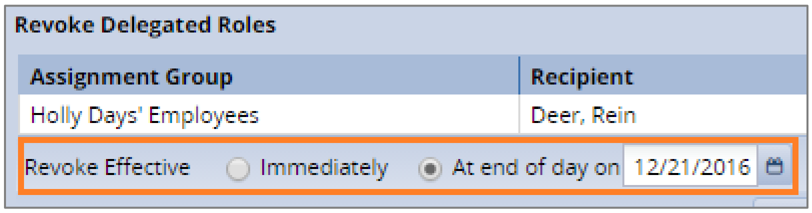
> *If an assignment group contains more than one delegated role, click the **Expand Group** button displayed next to the **Assignment Group** name to see all of the delegated roles.*

4. In the **Actions** column, select the delegation to be cancelled.
5. Selecting **Revoke** cancels only the delegation appearing in a single row.
6. Selecting **Revoke All** (if shown) cancels all delegations for that assignment group.

A new window appears listing the delegated right to be cancelled.

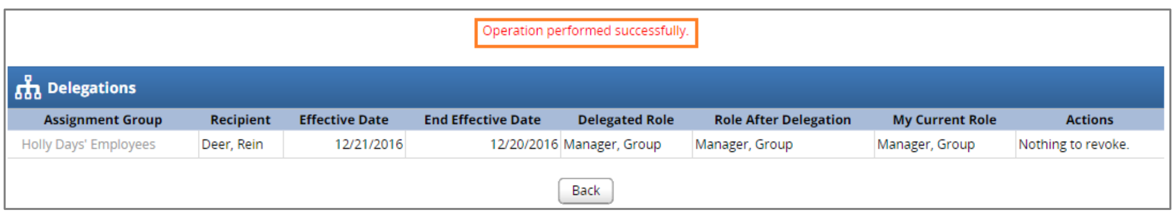


7. Choose the date on which the revocation is to be in effect or select the **Revoke Immediate** checkbox.



8. Click **Revoke Delegations** to proceed with the cancellation.

A message appears verifying the cancelled delegation.



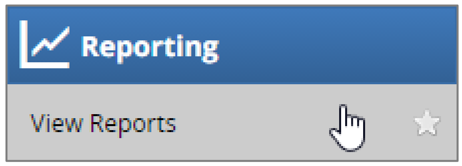
Lesson 6: Generating Reports

Managers access reports to view information about timesheets, schedules, and employees. See the *EmpCenter Time & Attendance Report Reference Guide* for more information.

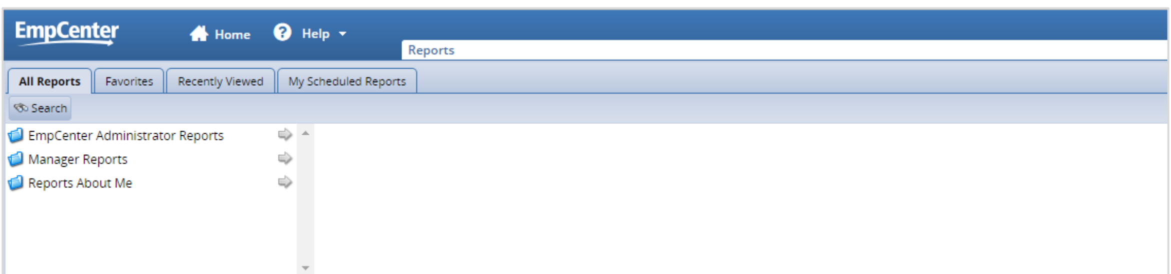
Viewing Reports

Reports provide specific information about select groups of employees.

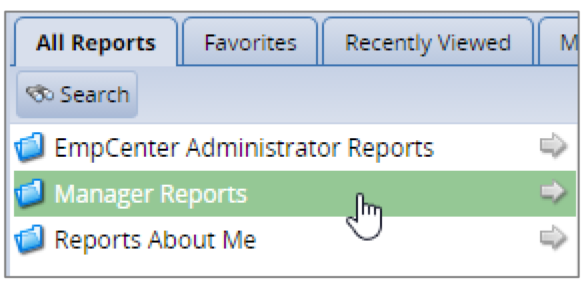
1. To view a group report, on the Home Screen, select **Reporting > View Reports**.



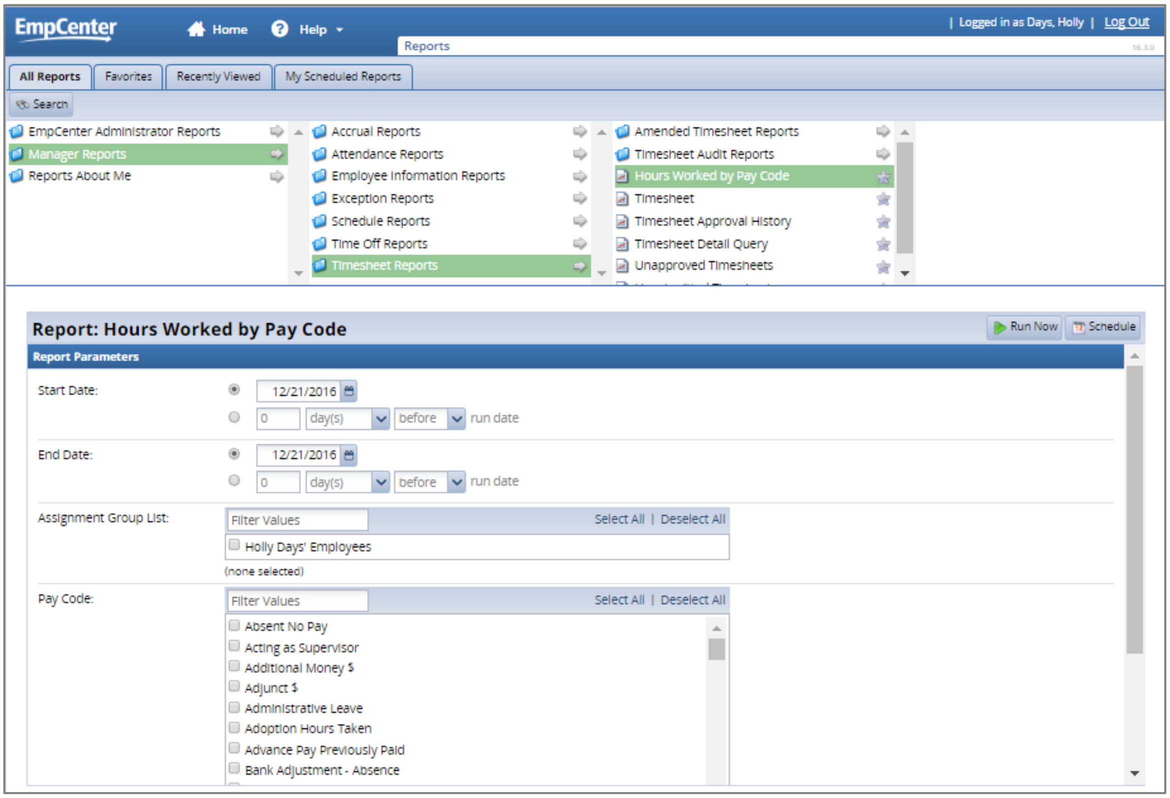
   A list of report categories appears.



2. Select the category, for example, **Manager Reports**. The right field populates with the various reports or subcategories in that category.



3. Select a subcategory, if necessary.
4. In the right-most field, select the name of the report to generate.
5. In the lower section of the **Report** window, define the parameters for this report.



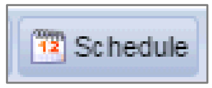
6. To run the report immediately, select the **Run Now** button.

   a. Select your preferred output format:

- **PDF** to view or print the output in Adobe PDF format.
- **Excel** to view or print the output in an Excel spreadsheet.
- **CSV** to view or print the output in a comma delimited file.
- **HTML** to view the report in the browser window as a web page.

   b. In the **Run Report Now** dialog, click **Run Now** to generate the report. EmpCenter displays the report in a separate window.

7. To schedule the report to run at a specific time, click the **Schedule** button.



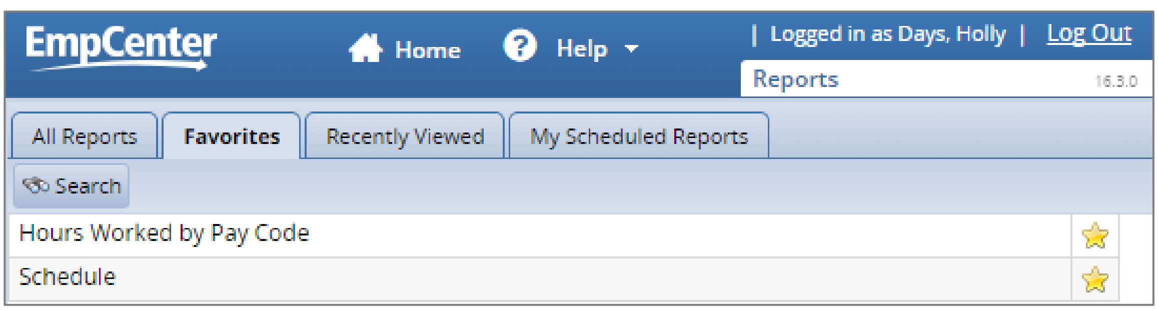
- Specify details about how, to whom, and in what format the report should be delivered; the frequency and schedule the report should run; and a name for the scheduled report.
  - Reports are delivered as attachments.
  - You can change the report name in the **Report Schedule Name** field.
- Choose an action:
  - Click **Create Schedule** to implement the report run schedule that you have defined. A status message confirms that the schedule created successfully.
  - Click **Cancel** to close the window without saving the report schedule.

Report Favorites

By designating a report as a “favorite”, you can find the report more quickly and save time instead of re-entering specifications each time you run the report. Favorites can be selected from the **Favorites** tab of the **Reports** window.

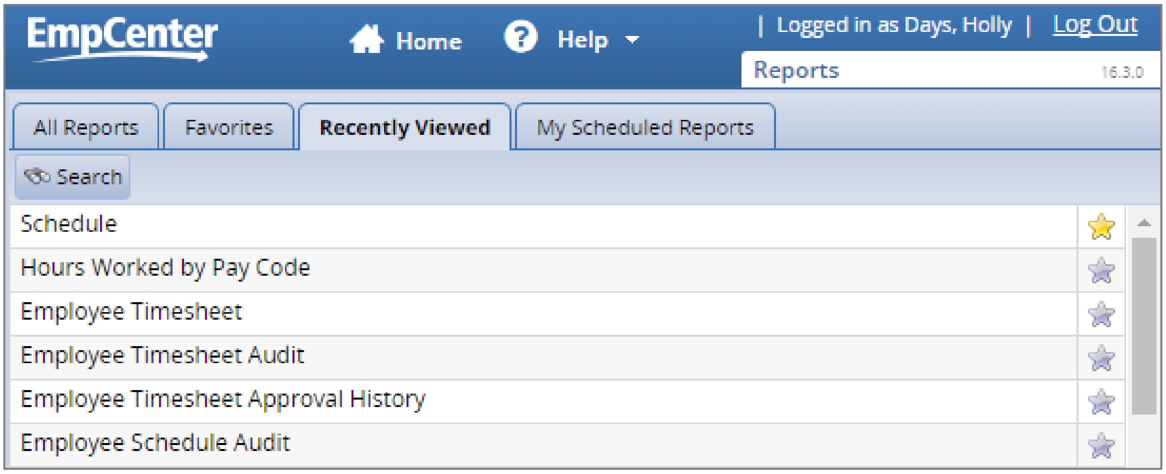
Designating a Favorite

1. In the **Reports** window, navigate to the report to designate as a favorite. You can select reports from the following locations:
   - **All Reports** tab
   - **Recently Viewed** tab
   - **Search** dialog
2. Click the gray **Favorites** button. It turns yellow, which means that the report is now a favorite.



Removing a Favorite

1. In the **Reports** window, find the report to remove from the list of favorites. Each report appears as a row in the list. The **Favorites** button is located at the right of the report name.
2. Yellow buttons indicate favorite reports. Click the button. It turns gray which means that the report is no longer a favorite.

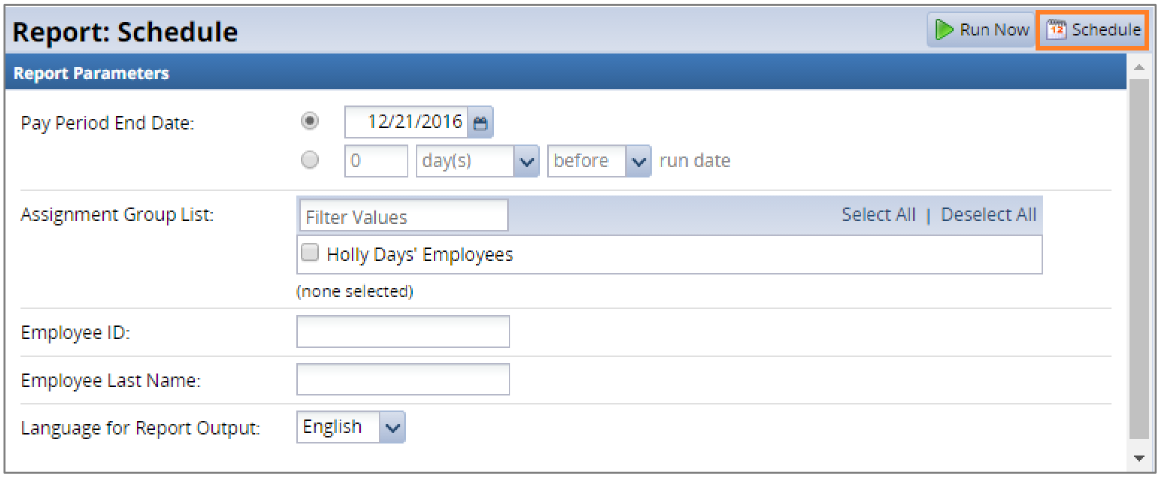


Scheduled Reports

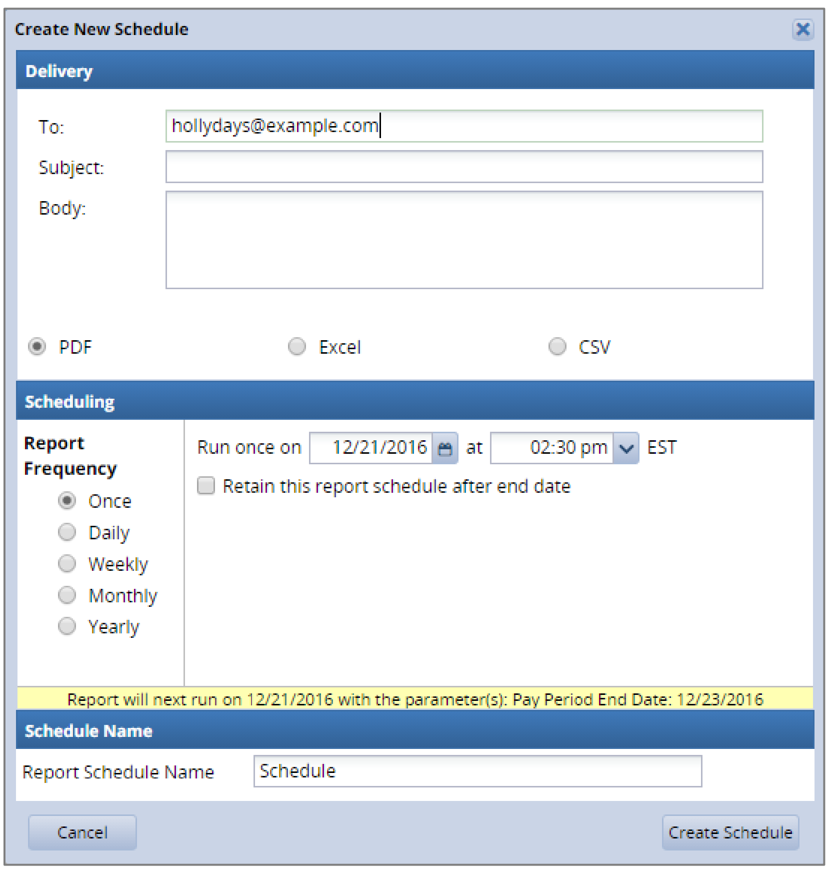
A scheduled report runs on a schedule that you define.

Creating a Scheduled Report

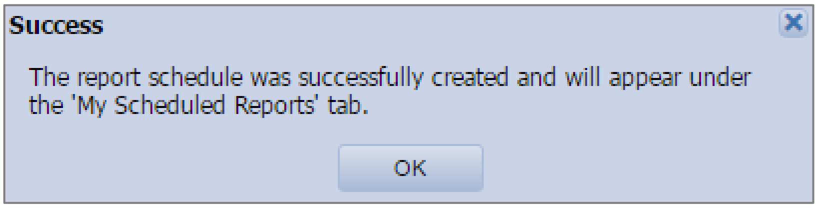
1. Open the **Reports** window and select a report. Click the **Schedule** button.



2. In the **Create New Schedule** dialog, set the scheduling options for the report. You can also change the **Report Schedule Name**. Reports are delivered as attachments.



3. Click the **Create Schedule** button. A screen similar to the following appears:

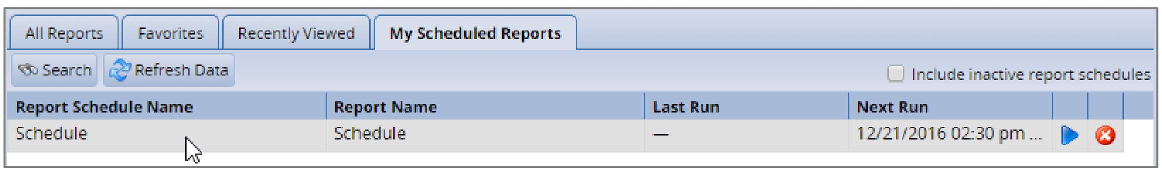


Accessing Saved Scheduled Reports

You can access a saved scheduled report prior to running or managing the scheduled report. Access the report from the **My Scheduled Reports** or **All Scheduled Reports** tabs in the **Reports** window and **Search** dialog.

1. In the **Reports** window, click the **My Scheduled Reports** or **All Scheduled Reports** tab.

   The respective tab appears with a list of the scheduled reports.



2. Click the row for the report to access schedule information.

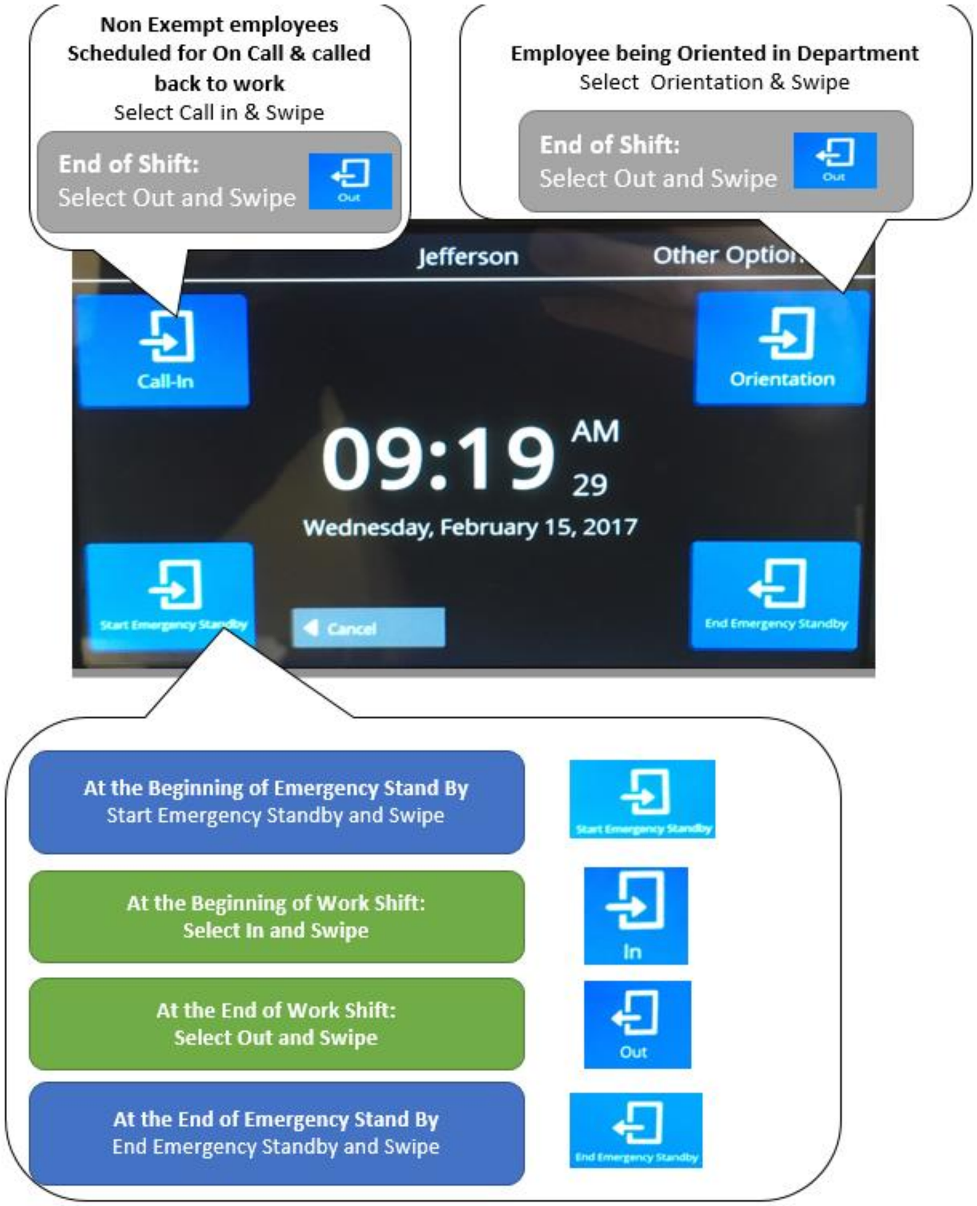
Lesson 7: Results Tab

EmpCenter automatically calculates most premiums with no special action required on your part. Only rarely will you need to take some action to cause an employee to receive an earned premium.

Check the **Results** tab on the employee timesheet to verify that the system calculated the expected premium.

The results tab can be collapsed to show you by paycode, by account code total hours/dollars being paid.

Appendix A: Clock at Jefferson


Non Exempt employees Scheduled for On Call & called back to work
Select Call in & Swipe
End of Shift:
Select Out and Swipe
Out
Employee being Oriented in Department
Select Orientation & Swipe
End of Shift:
Select Out and Swipe
Out
Jefferson
Other Option
Call-In
Orientation
09:19 AM 29
Wednesday, February 15, 2017
Start Emergency Standby
Cancel
End Emergency Standby
At the Beginning of Emergency Stand By
Start Emergency Standby and Swipe
Start Emergency Standby
At the Beginning of Work Shift:
Select In and Swipe
In
At the End of Work Shift:
Select Out and Swipe
Out
At the End of Emergency Stand By
End Emergency Standby and Swipe
End Emergency Standby

Appendix B: Employees scheduled in SmartSquare

Please refer to the Pay Code list for SmartSquare. Some pay codes will appear directly on the timesheet as they are scheduled.

- To **cancel** a Meal Break, edit time to 0 hour **then Save**.
- …