# **Time & Attendance**

# **MyTime Manager Functions**

Learn EmpCenter manager functions and workflow related to managing employees.

© WorkForce Software for Thomas Jefferson University January 4, 2017 EmpCenter<sup>®</sup> 16.3

LEGAL NOTICES

Copyright © 2017 WorkForce Software, LLC All Rights Reserved. WorkForce Software 38705 Seven Mile Road Livonia, MI 48152

www.workforcesoftware.com info@workforcesoftware.com 1-877-4-WFORCE 1-877-493-6723

Copyright and trade secret laws protect the information in this manual. Access to this material is provided only under license or as part of an evaluation of the WorkForce Software solution specifically authorized by WorkForce Software. In no other case are you permitted access to this information. Nor are you permitted to disclose this information to any third party. If you have been provided this manual under any other circumstances, you must contact WorkForce Software at 877 4-WFORCE (877-493-6723) to arrange to have this material returned immediately.

This document was last updated on March 1, 2017 February 27, 2017.

# **Table of Contents**

About This Guide1	
Objectives	
Conventions1	
Certification	
Comments 2	
Lesson 1: The Manager Dashboard3	
Manager Functions	
Time Entry 3	
Reporting	
Employees	
Schedules	
Settings	
Exceptions	
My Time Off Balances	
My Time Off Requests	
My Employees' Time Off Requests 4	
Employee Photographs5	
Lesson 2: Timesheet Components <u>6</u> 7	•
Timesheet Window Buttons	
Setting Date and Save Options <u>7</u> 8	
Finding Timesheets	
Sorting Timesheets	
Navigating Timesheets	•
Lesson 3: Working with Employee Timesheets 11	
Editing Employee Time	
Using Pay Codes	
Entering Timesheet Details	
Exception Handling13	
Deleting a Time Entry 15	
Group Time Entry	)
Adding and Editing Group Entries	,
Using Other Group Time Entry Tools	
Lesson 4: Working with Schedules 23	,
Standard Schedule Assignment	
Assigning Permanent Schedule Templates	

Assigning Temporary Schedule Templates	6
Group Schedule Entry	9
Lesson 5: Other Manager Functions 3	1
End-of-Period Reminders3Approving Timesheets3Amending Timesheets3Approving Time Off Requests3	2 5
Cancelling an Approved Time-Off Request	7
Viewing the Group Calendar	9
Viewing Time Off Requests from the Group Calendar	
Delegation4	1
Cancelling or Revoking a Delegated Role4	4
Lesson 6: Generating Reports 4	7
4 Viewing Reports	
Designating a Favorite	
Scheduled Reports	1
Creating a Scheduled Report5 Accessing Saved Scheduled Reports	
Lesson 7: Premiums Error! Bookmark not defined.	3

# **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: <u>wfstraining@workforcesoftware.com</u>

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.

EmpCenter 🔺	Home 🕜 Help 🕶	Home Screen					Log Ou 16:1
	() Tim	e Entry		E Schedules		Exceptions	
	My Time		*	My Calendar	索	<b>\$</b> 8 <b>\$</b> 8 <b>\$</b>	20 0
	Edit Emp	loyee Time	☆	Employee Calendars	☆	2	<u>*</u>
	Edit Time	e for Groups	\$	Group Calendars	ŝ	Sat 02/18 Warning your ETO bank balance of 8.8 hours is wi	
			-	۲		Sun 02/19 PNo time reported on scheduled day. Entry must be c	
	View Rep		*	입다 Settings		0.0 total hour(s) entered on timesheet for all jobs ar Mon 02/20	
	There is a participation of the participation of th		14	Manage Delegations	-	No time reported on scheduled day. Entry must be c 0.0 total hour(s) entered on timesheet for all jobs ar	
	🐸 Emj	ployees				Plu total hour(s) entered on timesneet for all jobs ar Thu 02/23 No time reported on scheduled day. Entry must be c	
	Group M	essaging	索			O finite reported on scheduled day. Entry must de c., O finite hourist entered on timecheat for all inhs ar	•
						My Time Off Balances	
						Banked Holiday Blood Donor ElB	
						ETO Healthy Families Leave	
						My Time Off Requests	
						No tasks	s found.

### **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**

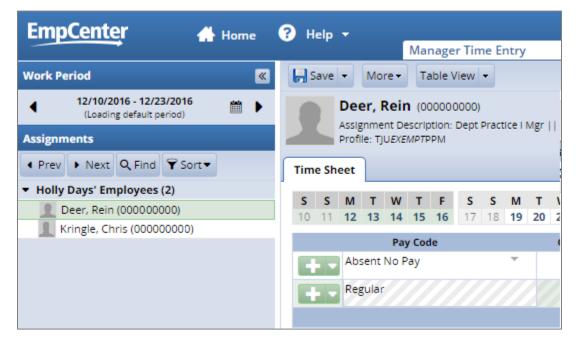
Shows employee time off requests that are pending your approval.

# **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 <b>Minimize</b> button lets you hide the assignment tree. When hidden, the button toggles to a <b>Maximize</b> button.
✓ Prev → Next	The <b>Prev</b> and <b>Next</b> buttons move you to the previous or next record available, respectively, based on your selection criteria.
Q, Find	The <b>Find</b> button locates records based on a common set of search criteria. To sort your search results, click the top of any column in the <b>Find Employees</b> window.
¥ Sort▼	The <b>Sort</b> button arranges employee records in a specific order.
◀ 04/06/2016 - 04/19/2016	The <b>Work Period</b> 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.

Assignments	Tim	Hour											riadelphia P			
Holly Days' Employees (2)     Deer, Rein (00000000)     Kringle, Chris (00000000)						<b>F</b> 16						Dec 10,	2016 to De	c 16, 20	16	Show /
		Abs	ent	Pay No P	o Cod ay	le		•	Co	st Ce	nter		Sat 12/10		Sun 12/	/11
		Reg	gular									Totals		0.00		0.00

### **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.

🕉 Find Employees	×
Search Criteria	_
Assignment Description:	
Employee Number:	
Last Name:	
Hire Date:	
Exclude inactive employees	
	Search Cancel
Search Results	<b>±</b>

- 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 1 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.

Work Period	<b>«</b>		📙 S	ave	•	More	••	Tabl	e Vie	w -											
12/10/2016 - 12/23/2016 (Loading default period)	<u>"</u> ►				Dee	r, R	ein	(0000	0000	00)											
Assignments	Υ	N	loven	nber	2016			4	De	ecem	ber 2	016	•	►			Janu	ary 2	017		
Prev → Next Q Find Ŷ Sort	s	м	т	w	т	F	s	s	м	т	w	т	F	s	s	М	т	w	т	F	s
<ul> <li>Holly Days' Employees (2)</li> </ul>			1	2	3	4	5					1	2	3	1	2	3	4	5	6	7
Deer, Rein (00000000)	6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
Kringle, Chris (00000000)	13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	2
	20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	2
	27	28	29	30				25	26	27	28	29	30	31	29	30	31				
																					_
								De	fault	Perio	bd	Т	oday								

- 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.

H s	Save 🔻	More -
R	Save an	d Find
-	Save an	d Next

- 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.

Work Period	Save + More Table View +	
12/10/2016 - 12/23/2016 (Loading default period)	Kringle, Chris C (00000000) Nurse Base Supy-23170354-000000000	
Assignments	Assignment Description: Nurse Base Supv    Assignment: Primary    FLSA St	tatus: N    Overtime Rule: 40    B
Prev → Next Q Find Ŷ Sort ▼	Profile: TJUNONEXEMPTCLOCKINGPPM	
	Time Sheet	
Deer, Rein (00000000)	S S M T W T F S S M T W T F	
Kringle, Chris (00000000)	S         S         W         I         W         I         F         S         S         W         I         W         I         F         Dec 10, 2016           10         11         12         13         14         15         16         17         18         19         20         21         22         23	to Dec 16, 2016 📃 Show
	Pay Code Cost Center Sat	12/10 Sun 12/11
	Clock Time	
	Totals	0.00 0.00

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

Time	e Sh	eet																		
S	s	М	т	w	т	F	S	S	м	т	w	т	F	Dec 10, 2016	- ch					
10	11	12	13	14	15	16	17	18	19	20	21	22	23	Dec 10, 2016	sn	ow All Weeks				
Da	ite							Pay	Code					Cost Center		Hours	Amount	High Frequency On	Comments	Total
Sat 1	2/1					Cloc	k Tim	ie					Ψ			09:00 am				0.0
Sati	2/10	5														05:00 pm				

### **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.

<mark>  </mark> 9	Save	•	Mor	e∙	Та	ble V	iew	•							
rofile	e: TJU	Nurs Assig	se Ba gnmei	ise Si nt De	upv-: escrip	2317		000	0000		Assię	gnme	nt: Pr	imary    Fi	LSA Status: N    Ove
Tim	e Sh	eet													
<b>S</b> 10	<b>S</b> 11	<b>M</b> 12		<b>W</b> 14	<b>T</b> 15	<b>F</b> 16	<b>S</b> 17	<b>S</b> 18	<b>M</b> 19	<b>T</b> 20	<b>W</b> 21		<b>F</b> 23	Dec 10,	2016 to Dec 16, 20
				Pay	y Cod	le					Co	st Ce	nter		Sat 12/10
		Clo	ck Ti	me					Ŧ						09:00 am
		Clo	ock T	ime						lba			_		05:00 pm
		Ab	sent	No I	Pay					G				Totals	0.00
		Ac	ting a	as Su	ipen	/isor									
		Ba	nked	l Hol	iday	Take	n								
		Be	reav	eme	nt										
		Blo	ood D	Dono	or Ho	urs									
		Ca	ll In												
		Ce	rtific	atior	n Bor	nus \$									
		Co	nfere	ence	In P	hila									
		ET	O FM	ILA S	cheo	duled						-	~		_

### **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.

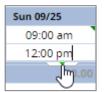
- 1. In Table View, click the green triangle in the corner of a slice to display the **Comment** Indicator.
- 2. Click the **Comment** tab to expand and collapse the **Comments** field.



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.

Wed 04/06	Thu 04/07	Fri 04/08	Sat 04/09	Sun 04/10	Mon 04/11		
08:56 am	08:58 am	09:01 am			09:00 am		
03:00 pm	03:03 pm	03:00 pm			03:01 pm		
8.00 👂	6						
14.0	Additiona	I data exists f	for this field	I. Expand de	tails to see		

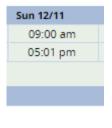
3. Click the **Comment** tab to expand or collapse the **Comments** field.



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

Pay Code	Cost Cer	nter Sat 09/24	Sun 09/25	Mon 09/26	Tue 09/27	Wed 09/28	Thu 09/29	Fri 09/30	Totals
Clock Time	Ψ	09:00 am							0.00
		05:00 pm							
Saturday									
High Frequency On Call C	Comments								
	Comments go here								

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

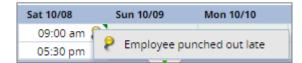
- 1. On the **Messages** tab, select any column header (**Date, Exception Message**, or **Severity**) to reorder the list.
- 2. Click the arrow next to the column name to select a different sort order.

hedule	Messages 👂	Leave Balances	Results	Attendance		
					Filter	e
Date		Exception Me	essage		s	eve
Sat 10/08		Employee pun	hched out lat	te	w	Varr

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



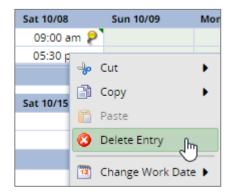
3. Click the pin to display the exception message.



### **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**.

() Time Entry	
My Time	\$
Edit Employee Time	Ŕ
Edit Time for Groups	ŝ

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.

EmpCenter 👫 Home	? Help 🗸			Logged in as Days, Holly   <u>Lo</u>	g Out
		Group Time Entry V	Vindow		16.3.0
Date: 12/21/2016	Group Entry	Daily Entry			
Assignment Group: Select One	▼ Find	Sort Employees	Edit Exceptions	Filter: Employee or assignment	
				_	
Please	select a group.				

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.

EmpCenter 🔥 Home	? Help -							
	Group Time Er	ntry Window						
Date: 12/17/2016	on Group Entry Daily Entry Add P Edit Add P	Edit						
Assignment Group: Holly Days' Employees	; (2) 🔻 🛛 🗞 Find 🗽 Sort Emplo	yees 🔀 Edit Exe	eptions Filter:	Employee or a	ssignment			
	Employee	Sat 12/17	Sun 12/18	Mon 12/19	Tue 12/20	Wed 12/21	Thu 12/22	Fri 12/23
	Deer, Rein (000000000) Dept Practice   Mgr-92170600-000000000	0		Regular 8.00	Regular 8.00	Regular 8.00	Regular 8.00	Regular 8.00
	Kringle, Chris C (00000000) Nurse Base Supv-23170354-000000000							
	<ul> <li>Select individual cells by clicking i</li> <li>Select a column by clicking the co</li> <li>You can also select multiple cells</li> </ul>	olumn header or a	n entire row by o	licking on the co			tell at the oppos	ite corner.

*For large groups, only the first 40 members display. Use the Filter <i>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.

EmpCente	🕇 🔥 Home	? Help 👻	Group Time Entry Window						Logged in a	as Days, H
Save and Retu	irn 📙 Save 🤇 🖨 Back	Daily Entry								
	Employee (Assignment) 🔻	Date 🔻	Action Pay Code	Cost Center	Description	In Time	Out Time	Hours	Amount Comments	
	Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Mon 12/19	8	•		hħ:mm a	hh:mm a			
	Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Tue 12/20	©	•		hh:mm a	hh:mm a			
	Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Wed 12/21	©	▼		hh:mm a	hh:mm a			
	Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Thu 12/22	0	•		hh:mm a	hh:mm a			

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.

Er	np <u>Cente</u> r	*	Home	? Help -									Logged in	as Days, Holly	Log O
		<b>.</b>	<u> </u>		Group Time Entry	Window									16
	Save and Return	- Save	C Bac	k Group Entry 🔻											
	Employee (Assignment)	Date	Action	Pay Code		Cost Center	Description	In Time	Out Time	Hours	Amount	High Frequency On Call	Weekend Premium	Comments	
	Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Mon 12/19, Tue 12/20, Wed 12/21	0	Clock Time	Ţ			hh:mm a	hh:mm a						
	Kringle, Chris C (Nurse Base Supv-23170354- 000000000)	Mon 12/19, Tue 12/20, Wed 12/21													

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.

EmpCenter A Home	? Help 🔻				Log	ged in as Days, H	iolly   <u>Log Out</u>
			up Time Entry W	/indow			16.3.0
Date: 12/17/2016 💷 🛛 📿 Clear Selec		p Entry	Daily Entry Add 📝 Edit				
Assignment Group: Holly Days' Employe	es (2) 🔻 🛛	🗞 Find 🗽	Sort Employees	Edit Except	ions Filter: Em	ployee or assig	nment
Employee	Sat 12/17	Sun 12/18	Mon 12/19	Tue 12/20	Wed 12/21	Thu 12/22	Fri 12/23
Deer, Rein (000000000) Dept Practice I Mgr-92170600-0000000000			Regular 8.00	Regular 8.00	Regular 8.00	Regular 8.00	Regular 8.00
Kringle, Chris C (000000000) Nurse Base Supv-23170354-0000000000							
<ul> <li>Select individual cells by clicking in t</li> <li>Select a column by clicking the colu</li> <li>You can also select multiple cells by</li> </ul>	mn header or ar	n entire row by o	clicking on the ce			ell at the oppos	ite corner.

- 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.

EmpCenter	*	Home	? Help -	Group Time Entry	Window							Logged in	as Days, Holly	Log (
Save and Return	Save	👍 Bac	k Group Entry 🔻											
Employee (Assignment)	Date	Action	Pay Code		Cost Center	Description	In Time	Out Time	Hours	Amount	High Frequency On Call	Weekend Premium	Comments	
Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Mon 12/19, Tue 12/20, Wed 12/21	0	Clock Time	•			nh:mm a	hh:mm a						
Kringle, Chris C (Nurse Base Supv-23170354- 0000000000)	Mon 12/19, Tue 12/20, Wed 12/21													

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**.

EmpCenter		삼 Hor	ne ? Help 🕶	Group Time B								Logged I	n as Days, Holly	
Save and Return	Save	de Ba	ack Daily Entry 🔻	Group Time b	ntry window									16.3.0
Employee (Assignment) ¥	Date 🔻	Action	Pay Code		Cost Center	Description	In Time	Out Time	Hours	Amount	High Frequency On Call	Weekend Premium	Comments	Â
Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Mon 12/19	0.0	Clock Time	٣			hh:mm a	hh:mm a						
Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Tue 12/20	0.0	Clock Time	Ŧ			hh:mm a	hh:mm a						
Deer, Rein (Dept Practice I Mgr-92170600- 0000000000)	Wed 12/21	0 <mark>.0</mark>	Clock Time	٣			hh:mm ə	hh:mm a						
Kringle, Chris C (Nurse Base Supv-23170354- 0000000000)	Mon 12/19		Clock Time	¥			hh:mm a	hh:mm a						
Kringle, Chris C (Nurse Base Supv-23170354- 0000000000)	Tue 12/20	0 <mark>.0</mark>	Clock Time	T			hh:mm a	hh:mm a						
Kringle, Chris C (Nurse Base Supv-23170354- 0000000000)	Wed 12/21	0.0	Clock Time	٣			hh:mm a	hh:mm a						

- 3. Make the necessary changes or additions.
  - Olick the Insert button to add time or schedule entries.
  - Olick 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.

Save and Return	Save	4	Back Daily	Entry •	Exception	ime Entry Window									1
Employee			Pay Code			Cost Center	Description	In Time	Out Time	Hours	Amount	High Frequency On Call	Weekend Premium	Comments	
Kringle, Chris 🤌 W C (Nurse Base Supv-23170354- 000000000)	Ved 12/14	00	Clock Time			•		bh:mm a	nn:mm a			8			
Kringle, Chris P T C (Nurse Base Supv-23170354- 000000000)	'hu 12/15	00	Clock Time			<b>T</b>		nrumm a	ntemm a			8			
Kringle, Chris P Fi C (Nurse Base Supv-23170354- 0000000000)	ri 12/16	00	Clock Time			•		htt:mm a	ntumm a			8			
				Mon 12/12 ( Mon 12/12 r Tue 12/13 r Tue 12/13 r Wed 12/14 r Thu 12/15 r Thu 12/15 r	No time reported No total hour(s) er No time reported No total hour(s) er No time reported No total hour(s) er	e ttered on timesneet for a on scheduled day. Entry n tiered on timesneet for a on scheduled day. Entry n ttered on timesneet for a on scheduled day. Entry n tiered on timesneet for a on scheduled day. Entry n	nust be corrected. Il jobs are less than 8.0 i nust be corrected. Il jobs are less than 8.0 i nust be corrected. Il jobs are less than 8.0 i nust be corrected.	scheduled hour(s) by scheduled hour(s) by scheduled hour(s) by	more than 30 mi more than 30 mi more than 30 mi	Wan nutes, Wan Wan nutes, Wan wan wan Wan	ning ning ning ning ning ning ning				

- 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**.

E Schedules	
My Calendar	$\Rightarrow$
Employee Calendars	$\Rightarrow$
My Time Off	$\Rightarrow$
Group Calendars	$\Rightarrow$
Review Time Off Requests	$\Rightarrow$
Assign Schedules	$\stackrel{\star}{\approx}$
Manage Group Schedules	$\Rightarrow$

The Assign Schedules window appears.

Choose an Action:							
Permanent Changes							
Assign Schedule Cycles							
Assign Schedule Templates							
Temporary Changes							
Assign Schedule Templates							

- 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.

Em <u>pCente</u> r	🐣 Home	?	Help •				Logge	d in as Days, Holly   <u>Log Out</u>				
			Permanent Schedule Template Assignment 16.									
Employees Active On			📙 Save 🛷 Reset 👍 Back 🛛 🜱 Change Filter 😭 Current filter: none									
As of Current Period		72										
Assignments Holly Days' Employees (2	)		Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range				
			📄 📝 Deer, Rein (Dept Practice   Mgr-92170600-000000000)	000000000) Schedule Template		Tuesday - Saturday, 3:00 p	MM/dd/yyyy	12/10/2016 - 12/23/2016				
			C IV Kringle, Chris C (Nurse Base Supv-23170354-000000000)	Schedule Template	۲	Tuesday - Saturday, 3:00 p	MM/dd/yyyy	12/10/2016 - 12/23/2016				
			Mass Edit			None		Apply to all checked rows				

- 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.

EmpCenter 🔒 Home	?	Help 🔻				Logge	d in as Days, Holly   <u>Log Out</u>	
		Temporary Schedule Template Assignment	16.3.0					
Employees Active On		📙 Save 👌 Reset 👍 Back 🛛 🜱 Change Filter 😭 Current filter: none						
As of Current Period	3							
Assignments			Schedule	Manager				
<ul> <li>Holly Days' Employees (2)</li> </ul>		Name Name	Generation Source	Override	Schedule Template	Effective Date	Valid Date Range	
		🕑 📝 Deer, Rein (Dept Practice   Mgr-92170600-000000000)	Schedule Template		Tuesday - Saturday, 3:00 p	MM/dd/yyyy	12/10/2016 - 12/23/2016	
		🕑 📝 Kringle, Chris C (Nurse Base Supv-23170354-000000000)	Schedule Template	Ø	Tuesday - Saturday, 3:00 p	MM/dd/yyyy	12/10/2016 - 12/23/2016	
		Mass Edit			None		Apply to all checked rows	

**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.

- Save 🔊 Reset 🖇 Back 🖓 Change Filter 😭 Current filter: none									
✓ Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range				
🕑 📝 Deer, Rein (Dept Practice   Mgr-92170600-000000000)	Schedule Template	<b>e</b>	Tuesday - Saturday, 3:00 p	MM/dd/yyyy	12/10/2016 - 12/23/2016				
	Schedule Template		Tuesday - Saturday, 3:00 p	MM/dd/yyyy	12/10/2016 - 12/23/2016				
Mass Edit			None	MM/dd/yyyy	Apply to all checked rows				

- 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.

🛃 Save 🔊 Reset < Back

- 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.

Employees Active On	
Tuesday December 27, 2016	12
Assignments	
<ul> <li>Holly Days' Employees (2)</li> </ul>	

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.

Employees Active On	🕞 Save 🖑 Reset 🐗 Back 💎 Change Filter 😭 Current filter: none					
Tuesday January 17, 2017						
Assignments <ul> <li>Holly Days' Employees (2)</li> </ul>	Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
	Deer, Rein (Dept Practice   Mgr-92170600-000000000)	Schedule Template			MM/dd/yyyy	01/07/2017 - 01/20/2017
	Kringle, Chris C (Nurse Base Supv-23170354-000000000)	Schedule Template		None Empty		01/07/2017 - 01/20/2017
				Tuesday - Saturday, 3:00 pm	-11:30 pm	
	Mass Edit			None	MM/dd/yyyy	Apply to all checked rows

- 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.

Sc	chedule Messages Leave Balances Results Attendance																					
	S I	<b>S</b> 9	M 10	т 11	W 12	T 13	<b>F</b> 14	<b>S</b> 15	<b>S</b> 16	<b>M</b> 17	<b>T</b> 18	<b>W</b> 19	<b>T</b> 20	<b>F</b> 21	Oct 8, 2016 t	o Oc	t 14, 2016 🛛 🚽	Show All Weeks	;			
					Pa	y Cod	e				5	Sat 10	0/08		Sun 10/09		Mon 10/10	Tue 10/11	Wed 10/12	Thu 10/13	Fri 10/14	Total
	÷		Sch	nedu	led H	lours				Ŧ							08:00 am	08:00 am	08:00 am	08:00 am	08:00 am	40.00
																	04:00 pm	04:00 pm	04:00 pm	04:00 pm	04:00 pm	
														0.00	C	.00	8.00	8.00	8.00	8.00	8.00	40.00

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.

EmpCenter 🚓 Home 😗 Help -								
Group Schedule Window								
Date: 02/14/2016 Clear Selection								
Assignment Group: Select One   Find Filter: Employee or assignment								
Please select a group.								

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.

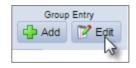
EmpCenter 🐣 Horr	ne ? Help		oup Schedule Window			Lo,	gged in as Days, Holly   <u>Log Ou</u>				
	Date:       12/10/2016       Image: Comp Steelers       Daily Envy         Date:       12/10/2016       Image: Comp Steelers       Image: Comp Steelers         Assignment Group:       Holly Days' Employees (2) •       Image: Comp Steelers       Filter: Employee or assignment										
Employee	ee Sat Sun Mon Tue Wed Thu Fri 12/10 12/11 12/12 12/13 12/14 12/15 12/16										
Deer, Rein (00000000) Dept Practice I Mgr-92170600-0000000000			Scheduled Hours 09:00 am - 05:00 pm	Scheduled Hours 09:00 am - 05:00 pm	Scheduled Hours 09:00 am - 05:00 pm	Scheduled Hours 09:00 am - 05:00 pm	Scheduled Hours 09:00 am - 05:00				
Kringle, Chris C (000000000) Nurse Base Supv-23170354-0000000000			Scheduled Hours 08:00 am - 04:00 pm	Scheduled Hours 08:00 am - 04:00 pm	Scheduled Hours 08:00 am - 04:00 pm	Scheduled Hours 08:00 am - 04:00 pm	Scheduled Hours 08:00 am - 04:00				
<ul> <li>Select individual cells by clicking in a</li> <li>Select a column by clicking the colu</li> <li>You can also select multiple cells by</li> </ul>	mn header or a	n entire row by o	clicking on the cell to the left of the		rner.						

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.

Too many results; only the first 5 have been displayed. Please use the find button or the filter field to refine your results.

- 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.
  - Olick 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	<ul> <li>This is your second reminder.</li> <li>The following employee timesheets are not approved:</li> <li>*Employee names and pay period end date will be listed</li> </ul>			

# **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.

Logged in as Days, Holly   Log Out
eets 163.0
Find Show: All Timesheets

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

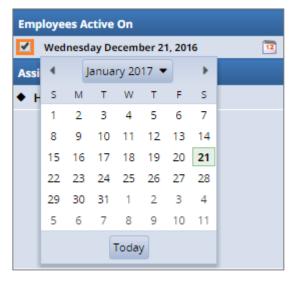


The **Approve Current Timesheets** window appears. The names of the employees in the group populate the main window.

EmpCenter	🕂 Home	? н	lo 🔻												Logged in	as Days, Holly	Log Out
				Approve Timesheets for Holly Days' Employees 16													
Employees Active On		🚽 S	ave Approvals	🚜 Approve All	Sho Find Sho	w: All Timesh	eets	۲									
As of Current Period	(	12															_
Assignments			Approve Current Timesheet for Period Ending 12/23/2016														
<ul> <li>Holly Days' Employees (2)</li> </ul>			Name	← Empl	Sto oyee Perio Hou	od Hours	Regular Hours	OT/DT F Hours	Premium Hours	Shift Diff Hours	Incentive Hours	Leave Hours	Unpaid Hours	Amount	Exceptions	Manager's Approval	
			Kringle	, Chris C 0000	00000	80.0 0.	0.0	0.0	0.0	0 0.	0 (	0.0 0.	0 0.	0 0.	0 Yes	Approve	٢
			Approve	Current Time	esheet for	Period End	ing 12/23/2	2016									
			Name	<ul> <li>Employee</li> </ul>	Std Period Hours	Total Hours	Regular Hours	Premiur Hours	n Shift Hou		icentive Hours	Leave Hours	Unpaid Hours	Amount	Exceptions	Manager's Approval	
			Deer, F	tein 00000000	0 8	80.0 80.	0 80.	0	0.0	0.0	0.0	0.0	0.0	0 0.	0 No	Approve	٢

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**

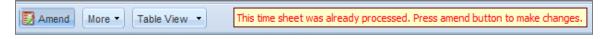
Managers can amend timesheets for past pay periods for employees in assignment groups delegated to them. How far back in the past amendments are permitted is determined by your organizational rules and can differ by role. Common limits are shown in the table.

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

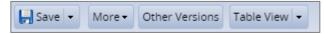
- Data from amended timesheets are not included in reports unless the amended timesheet has been approved or approved and locked.
- Amended timesheets must be approved by a manager, or a higher role, to be included in end of period processing and paid.
- Any changes made to a timesheet that has already 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.

Pending Requests Time Off	Request History					
Employee ID	Employee Name	Approval Status	Start Date	End Date	Hours Requested	Last Modified
000000000	Deer, Rein (Dept Practice I Mgr	Pending	01/23/2017	01/27/2017	40	12/21/2016 01:14 pm

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.

n <u>pCente</u> r 🚓 Home 🔞 I	Help -				Logged in as	Log.Ou
1pCenter 💣 Hume 😧 1		Time Off Review Summary				16.3
iew Request List 🖉 Approve Request 🕌	Reject Request					View Group Calend
equest Summary rer, Rein (Dept Practice I Mgr-92170600- 00000000) Pending		aptions (0) History (1) Bar Date/Time Approva 12/21/2016 01:14 pm Pending		ments		
Date Pay Code P	Hours					
Mon 01/23/2017 ETO Sched	8.0					
Tue 01/24/2017 ETO Sched	8.0					
Wes 01/25/2017 ETO Sches	8.0					
Thu 01/26/2017 ETO Sched	8.0					
Fri 01/27/2017 ETO Sched	8.0					
TO Object Pactice 114g-8217606-00000000     Elif Days Pacifics 114g-9217606     Elif Days Pacifics 114g-9217806     Ended Helder Stept Pacifics 114g-9217806     Elised Denser Eligit Pacifics 114g-92179600-00	1) 00000000000 000000000000000000000000	25				
<ul> <li>EBE (Dept Practice 1 Mgr - 92170600 -0000000000</li> <li>Ranked Hulbday (Dept Practice 1 Mgr - 92170600</li> <li>Hulbdelphia Sick (Dept Practice 1 Mgr - 92170600</li> </ul>	1) 00000000000 000000000000000000000000	50	Ma 1		Sep 1 Nev	с1 Дай 17 200

- 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**.

Manager Comments							
Enjoy your vacation.							
Approve Request	Cancel						

- 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.

Em <u>pCente</u> r	🕂 Home ? He	lp –				Logged	l in as   Log O
			Off Review Sumr	nary			16
							View Group Calendar
Pending Requests	Time Off Request History	<i>,</i>					
Current filter: From:	Current filter: From: 06/24/2016 😪 Change Filter						💡 Change Filter
Employee ID	Employee Nan	ne	Approval Status	Start Date	End Date	Hours Requested	Last Modified 🔹
00000000	👤 Deer, Rein	(Dept Practice I Mgr	Approved	01/23/2017	01/27/2017	40	12/21/2016 01:27 pm

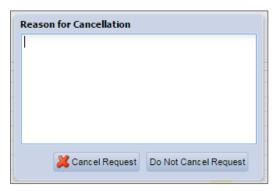
## **Cancelling an Approved Time-Off Request**

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

The **Request Summary** window appears.

View Request List	🔀 Cancel Request						
Request Sum leer, Rein (Dept 000000000) Approved	nmary Practice I Mgr-92170600-	1	Exceptio		tory (2) Bank Us Approval Status Pending	-	Comments
Abbioved			12/21/20	)16 01:27 pm	Approved	Days, Holly	
Date	Pay Code	Hours					
Mon 01/23/2017	ETO Sched	8.0					
Tue 01/24/2017	ETO Sched	8.0					
Wed 01/25/2017	ETO Sched	8.0					
Thu 01/26/2017	ETO Sched	8.0					
Fri 01/27/2017	ETO Sched	8.0					
EIB (Dept Prac Banked Holida Philadelphia S	ctice I Mgr-92170600-00000 tice I Mgr-92170600-000000 y (Dept Practice I Mgr-92170 ick (Dept Practice I Mgr-9217 Dept Practice I Mgr-9217060	0000) 600-00000000 0600-0000000	000)				
			50				
			25				
			0				

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.

Status		×
The request has	s been succes	sfully canceled
	OK	
	ОК	

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

Pending Requests Time Off Request History							
Current filter: From: 06/24/2016	Current filter: From: 06/24/2016						
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.

Exceptions (0)	Hist	ory (3)			
Date/	Time	Approv	al Status	User	Comments
12/21/2016 01:1	4 pm	Pending	3	Deer, Rein	
12/21/2016 01:2	27 pm	Approv	ed	Days, Holly	
12/21/2016 01:4	l2 pm	Cancelle	ed	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.

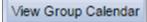
To access the Time Off Review Summary window:

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

Schedules	
My Calendar	☆
Employee Calendars	Ŕ
My Time Off	Ŕ
Review Time Off Requests	
Assign Schedules	索
Manage Group Schedules	숤
6	

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.

February 20	)14			(	Legend Print Calend	ar < Today >
Sun 26	Mon 27	Tue 28	Wed 29	Thu 30	Fri 31	Sat 1
		<ul> <li>Salas, JOSE(Joe) J - Time Off</li> </ul>	<ul> <li>Salas, JOSE(Joe) J - Time Off</li> </ul>			
2	3	4	5	6	7	8
9	10	11	12	13	14	15 • AVALOS, STEVE L - Pending Time Off
16	17	18	19	20	21	22
23	• Mon 02/17 24	25	26	27	28 • AVALOS, STEVE L - Pending Time Off	1

## 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.

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

Roles which can be delegated will be defined as follows:

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.

Enter Search Criteria
Group Description:
Cancel Search
You may use * as a wildcard. For instance, ab* would match abc or abbey.

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

Choose Delegate Options				
Assignment Group	Role to Delegate	Effective Date	End Effective Date	Allow Re-delegation
Holly Days' Employees (2)	Manager, Group 🔻	12/21/2016	12/28/2016	
		Cancel Next		

- 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.

Search for Delegation Recipients
User ID:
First Name:
Last Name:
Only those who can receive one of the selected roles will be shown.
Cancel Search
Max Results: 100 You may use * as a wildcard. For instance, ab* would match abc or abbey.

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

EmpCenter A Home	Help - Delegate
Search for Delegation	Search Results
Recipients User ID:	Select
First Name:	Name Last Name
Last Name: deer	Select
Only those who can receive one of the selected roles will be shown.	
Cancel Search	
Max Results: 100 You may use * as a wildcard. For instance, ab* would match abc or abbey.	

9. Select a delegate.



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

Status Message
Role(s) successfully delegated to user Deer, Rein Role Manager, Group on assignment group Holly Days' Employees (2)
Continue

**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.

Enter Search Criteria
Group Description:
First Name:
Last Name:
User ID:
As Of Date:
MM/dd/yyyy
Cancel Search
You may use * as a wildcard. For instance, ab* would match abc or abbey.

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.

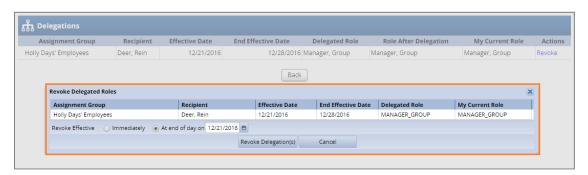
Delegations								
Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	Role After Delegation	My Current Role	Actions	
Holly Days' Employees	Deer, Rein	12/21/2016	12/28/2016	Manager, Group	Manager, Group	Manager, Group	Revoke	
Back								

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.

Revoke Delegated Roles						
Assignment Group	Recipient					
Holly Days' Employees	Deer, Rein					
Revoke Effective 🔵 Imme	diately 💿 At end of day on 12/21/2016 😁					

8. Click Revoke Delegations to proceed with the cancellation.

Revoke Delegation(s)

A message appears verifying the cancelled delegation.

Operation performed successfully.								
ਸ਼ੈ Delegations								
Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	Role After Delegation	My Current Role	Actions	
Holly Days' Employees	Deer, Rein	12/21/2016	12/20/2016	Manager, Group	Manager, Group	Manager, Group	Nothing to revoke.	
Back								

# **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.

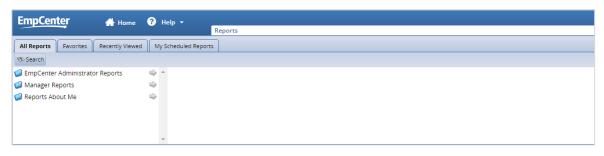
# **Viewing Reports**

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.

EmpCent	ter	🐣 Home	? Help -				Logged in as Days, Holly   Log Out
				Reports			16.3.0
All Reports	Favorites	Recently Viewed	My Scheduled Repor	s			
🗞 Search	· · · ·						
🗐 EmpCenter.		or Reports	🛸 🔺 🥥 Accrual Re		🛸 🔺 🥥 Amended Timesheet Reports	÷ .	
Manager Re Reports Abc	out Me		Exception i     Schedule R     Time Off R     Timesheet	nformation Reports Reports eports eports	Timesheet Audit Reports  Hours Worked by Pay Code  Timesheet  Timesheet Approval History  Timesheet Detail Query  Unapproved Timesheets	©	
Report Para		Worked by	Pay Code	-	_	-	▶ Run Now 🔭 Schedule
Start Date		•	12/21/2016 😁	before 🗸 run date			
End Date:		•	12/21/2016 😁	before 🗸 run date			
Assignmer	nt Group List		Values ly Days' Employees elected)		Select All   Deselect All		
Pay Code:		Abs Acti Adc Adj Adj Adj Adv Adv	Values ient No Pay ing as Supervisor ittional Money \$ unct \$ ministrative Leave pption Hours Taken rance Pay Previously Pa ik Adjustment - Absence		Select All   Deselect All		

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



a. Select your preferred output format:

Run Report Now			×
Delivery			
Delivery Method: PDF	View Now  C Excel	CSV	O HTML
Cancel			Run Now

- **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.

Emp <u>Cente</u> r	🕂 Home	? Help 🗸	Logged in as Days, Holly	Log Out
		Reports		16.3.0
All Reports Favorites	Recently Viewed	My Scheduled Report	s	
👁 Search				
Hours Worked by Pay Code	2			☆
Schedule				会

## **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.

Emp <u>Center</u>	🕂 Home 🕜 Help 🗸		Logged in as Days, Holly	Log Out	
			Reports	16.3.0	
All Reports Favorites	Recently Viewed	My Scheduled Repo	orts		
🕸 Search					
Schedule				☆	*
Hours Worked by Pay Code	2			*	
Employee Timesheet				*	
Employee Timesheet Audit	:			*	
Employee Timesheet Appro	oval History			*	
Employee Schedule Audit				*	

# **Scheduled Reports**

A scheduled report runs on a schedule that you define.

## **Creating a Scheduled Report**

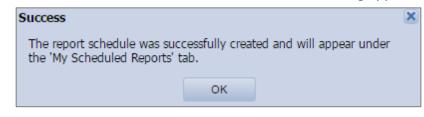
1. Open the **Reports** window and select a report. Click the **Schedule** button.

Report: Schedule		🕨 Run Now 📴 Schedule
Report Parameters		·
Pay Period End Date:	● 12/21/2016 😁 ● 0 day(s) 🗸 before 🗸 run date	
Assignment Group List:	Filter Values Holly Days' Employees	Select All   Deselect All
	(none selected)	
Employee ID:		
Employee Last Name:		
Language for Report Output:	English 🗸	

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.

Create New Schedule							
Delivery							
To:	hollydays@example.com						
Subject:							
Body:							
L							
PDF	CSV						
Scheduling							
Report	Run once on 12/21/2016 🗂 at 02:30 pm 🗸 EST						
Frequency     Once	Retain this report schedule after end date						
<ul> <li>Daily</li> </ul>							
Weekly							
Monthly							
Yearly							
Peport will pe	avt run on 12/21/2016 with the parameter(c): Bay Period End Date: 12/22/2014	c					
Schedule Name	Report will next run on 12/21/2016 with the parameter(s): Pay Period End Date: 12/23/2016 Schedule Name						
Report Schedule N	Name Schedule						
Cancel	Create Sche	dule					

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.

All Reports	s Favorites	Recently Viewed	d My Scheduled Reports				
🕫 Search	Refresh Data	a			Include inactive rep	ort s	chedu
Report Sch	edule Name	Re	eport Name	Last Run	Next Run		
Schedule	Ν	Sc	thedule	-	12/21/2016 02:30 pm		3
	2						

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

# Lesson 7: Results Tab

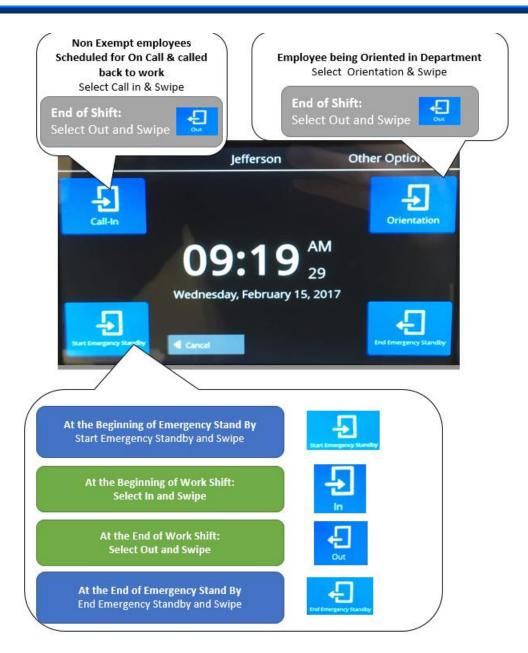
EmpCenter automatically calculates most premiums with no special action required on your part. Only rarely will you need to take some action to cause an employee to receive an earned premium.

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





# **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.
- ...

