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Advanced TRS Functionality

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&

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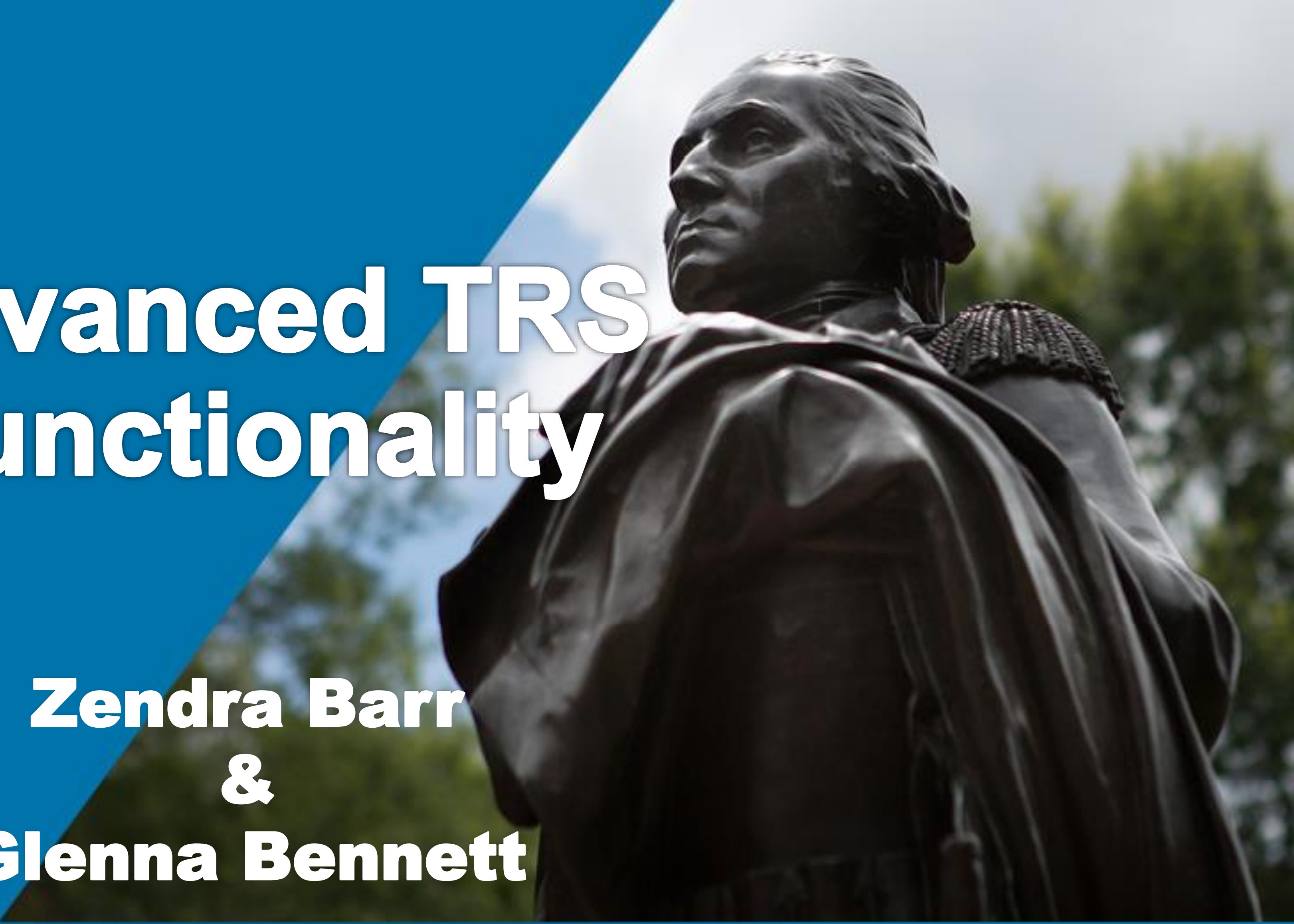

Agenda

- Dataview Refine Feature and Custom Filters
- Reviewing FWS balance from Dataviews and how to export
- Broadcast Messaging: How to Create a Notice
- Checking employee timecard punch requests
- Checking Multiple Assignments
- How to export data
- Running reports
- Payroll Processing Reminders
- Questions and Answers

Webinar Housekeeping Tips

- This is an advanced class for current timekeepers but everyone is welcome to attend
- Keep yourself on mute unless you have a question
- This will be recorded to view at a later time
- If you have a department specific question you can email timerep@gwu.edu or call Zendra to discuss
- If you would like to see additional classes please email timerep@gwu.edu with the topic you would like to see offered
- Your always welcome to add a meeting invite to Zendra's calendar if you need help. My calendar should be up to date.
- All the tip sheet notes for this session can be found on our GW Time Reporting System page under **Time Reporting and Time Off Request Processing.**

Dataview Refine Feature and Custom Filters

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What is a Dataview?

- There are many similarities between reports and Dataviews.
- Dataviews are embedded applications that allow users to select one or more employees and perform an action on them, such as adding a punch, approving their timecard, or accessing their people record or timecard.
- Dataviews allow users to apply a column-level count, sum, average, minimum or maximum calculation on any column, as applicable to each column's data type. If the Dataview or report is grouped, each group of data will also display a summarized calculation for each subset.
- Dataviews can be exported into Excel and modified
- Dataviews can not be scheduled to run like a report

Dataview Column drop-down Options

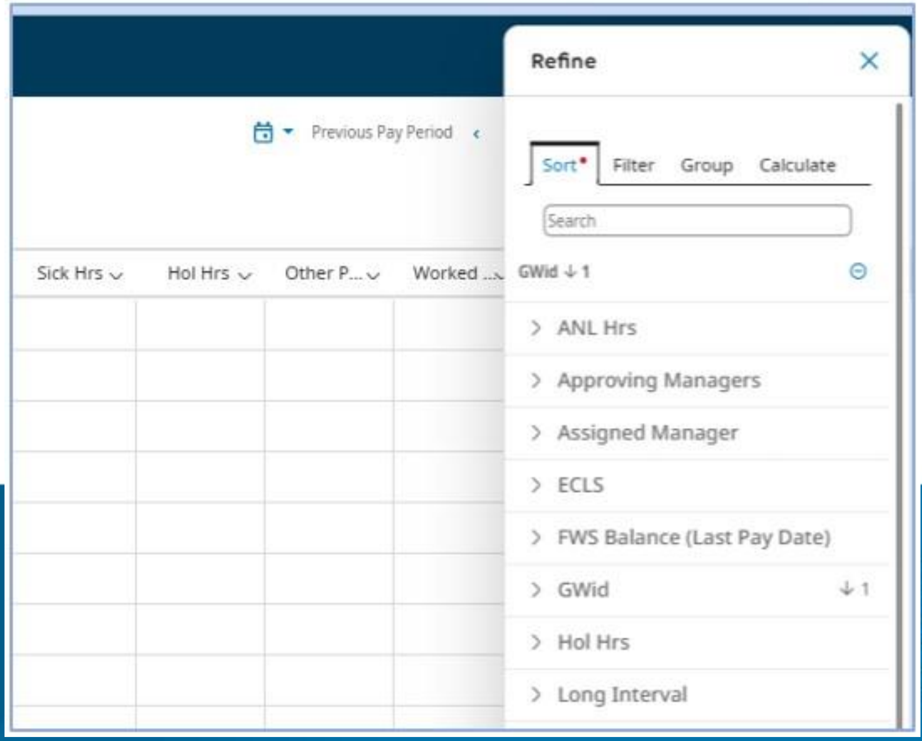
Certain changes can be applied directly to the Dataview columns. Options may differ by data type. You can filter Dataviews by using the Filter row on the Dataview or selecting the Refine button from the menu.

- You can sort records
- Group by Values (such as position or Pay Rule)
- Add calculations
- Hide Columns
- Rearrange columns

Dataview Refine Option

Use the **Refine icon** in the top left corner of the Dataview to open the Refine Panel on the right side of the form.

- When the **Refine Feature** is enabled, one or more sort options may be added based on the columns available in the Dataview
  - Add calculations
  - Sum, Max, Min, Ave hours
  - Add Group by
  - If some filters are not available in the drop-down menus for the columns, they may be available to add using the Refine feature.

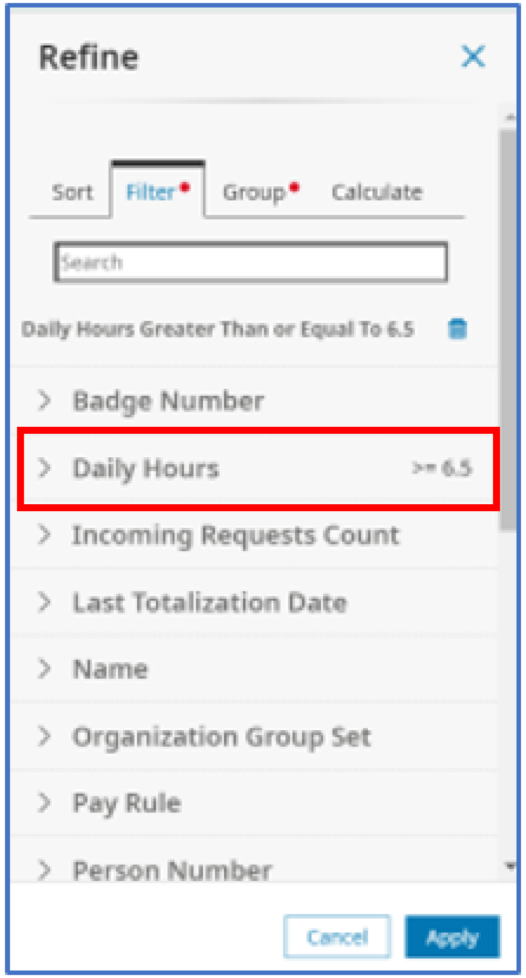


Dataview Refine Option

Use the Refine icon in the top left corner of the Dataview to open the Refine Panel on the right side of the form.

When the **Refine Feature** is enabled, one or more sort options may be added based on the columns available in the Dataview

- Add calculations
- Add Group by
- While filters are not available in the drop-down menus for the columns, they can be added using the Refine feature.
- In this screen, the Dataview is filtered to only display records where the Daily Hours are >= 6.5.



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Dataview Filter Tab

- Dataview filters allow you to narrow down the displayed information to specific items of interest.
- You can apply filters through the Refine panel by selecting the desired column and choosing from available filter options based on the data type, such as Equal or Greater Than.
- Multiple filters can be selected simultaneously. After setting the filters, you need to **click Done** and then **Apply** to see the refined results.
- Filters can be managed by using the filter icon to show or hide the filters row at the top of each column.

Dataview Filters

Below is a list of Dataview filters that can be used. This info is on our GW Time Reporting website.

- **=** Equal To, includes records matching the value
- **!=** Not Equal To, excludes records matching the value
- **> , <** Greater than the value , Less than the value
- **>=, <=** Greater than or equal to…, Less than or equal to the value
- **Is Null Blank**, unpopulated value
- **Is Not Null** Not a blank value Between
- **Between** one value and another (use semi-colon ‘;’)
- **Is Not Between** Not between one value and another (use semi-colon ‘;’)
- **Starts With** Includes records where the value begins with the string / characters entered
- **Not Starts With** Excludes records where the value begins with the string / characters entered
- **In** Includes records matching one or more full value (use semi-colon’;’)
- **Not In** Excludes records matching one or more full value
- **Custom** Used to provide filters to include/exclude records

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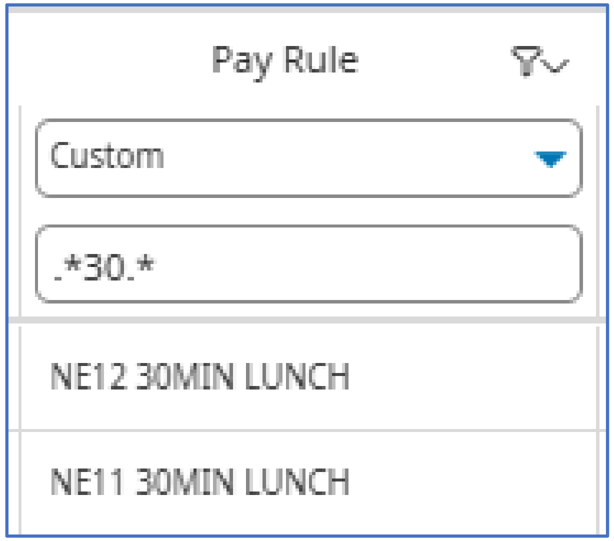
Custom Filter

Examples using a **Custom Filter** and wild card “.*”:

Example: To find a Pay Rule for anyone with a 30 minute meal break :

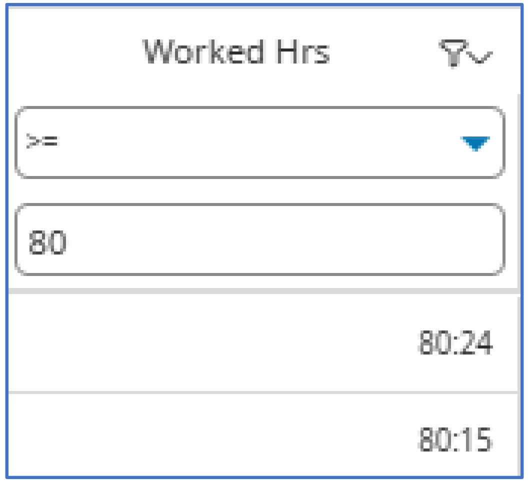
- Select Custom Filter
- .*30.* will display all employees with a 30 minute meal break



Custom Filter

Examples using the **Custom Filter** to find worked hours over 80:

- Select Custom Filter
- Select “>=“
- Enter 80
- Select Enter key



Custom Filter

Examples of using the **Custom Filter** with the wild card .* filter against the Job Description:

- PT.* Returns the 'PT' and the PT w Cert jobs
- .*truck.* Returns jobs with 'truck' in the title: Turret Truck Operator, Reach Truck Operator
- .*an.* Returns jobs that contain 'an', General Manager, Electrician, Materials Handler
- .*an Returns jobs with 'an' at the end: Electrician
- r.*r Returns jobs that start and end with 'r': Reach Truck Operator, Receiver

Reviewing FWS Amount

How to Retrieve FWS Info

You can use the **FWS_Employee Hours by Labor Category** or the **GW Pay Period Close Dataview** to check an employees Federal Work Study Balance as of **the last pay date**.

- **FWS_Employee Hours by Labor Category:** The Hyperfind will default to WORKSTUDY. You can change the date range and Hyperfind to look at all bi-weekly employees. The Dataview is grouped by position number.
- **GW Pay Period Close:** The Hyperfind defaults to **GW All Home.** Shows one line per student with multiple position hours combined.
    - You can filter on the External ID (is not null) in the FWS labor Category Dataview
        - The **External ID** is the GWid that identifies the employee has more than one position
    - You can **group by Position** to see where are worked
    - You can select the **Share** button to export the data

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How to Create a Notice

Broadcast Messaging
How to Create a Notice

- Timekeepers and Managers can create notices within the system that can be sent to an individual or group of selected employees, providing a direct communication channel from managers to employees. Messages will go to the employees **Alert Center** through the computer and Mobile App.

- Notices can be configured so that employees are required to acknowledge the notice (either by selecting OK or Yes/No).

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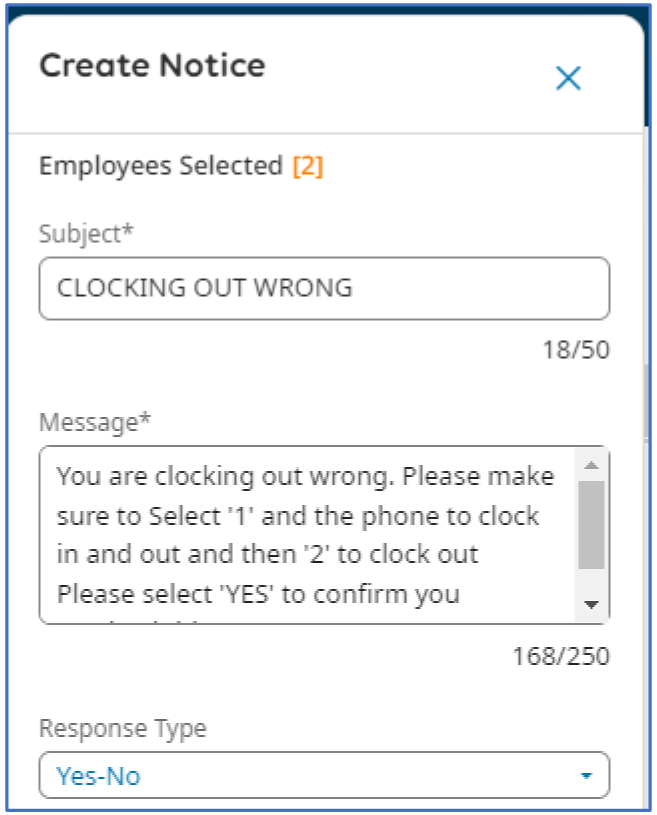
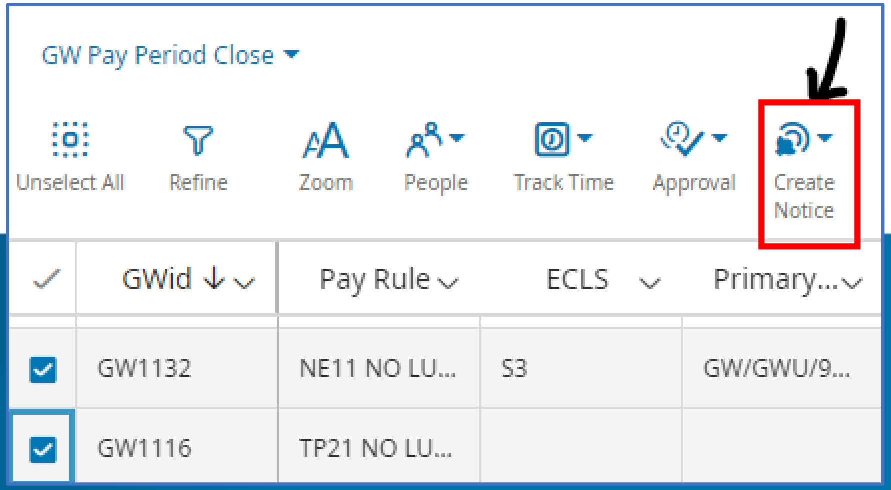
Create Notice

- On a Dataview you can send a notice to employees.
  - Select employee or employees to send message
  - Select **Create Notice**
  - A box will pop up to write your message
  - Select **Send**
  - Employees will see it under their notifications
  - If sending to multiple employees they will not know who else you sent it to

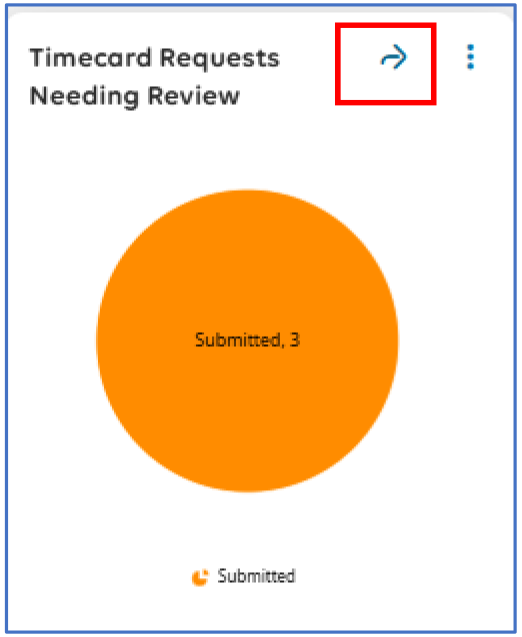




Resolving Employee Punch Requests

Resolving Employee Punch Requests

- Timecards can not be approved until all Punch Requests are resolved by being approved or refused.
- Punch request notifications will be sent to the assigned manager in the Control Panel.
- Timekeepers and Managers can see the Timecard Requests needing review using their **Timecard Requests Needing Review** Tile.
- Timekeepers and Managers can now approve Timecard Requests.
    - **Note**, while managers can approve or refuse punch requests they can not actually edit or approve the timecard without getting the correct timekeeper access.



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Checking Multiple Assignments

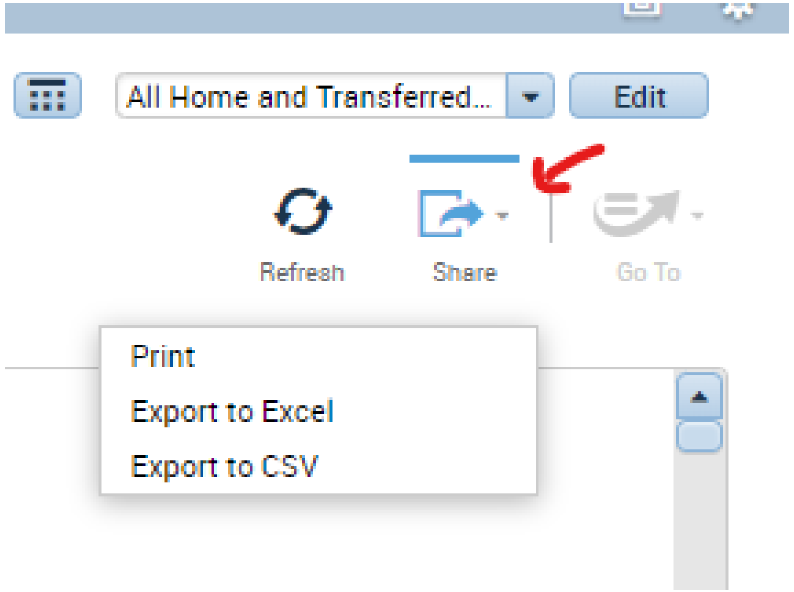
Checking Multiple Assignments

- In TRS you can identify what employees have more than one position with GW
- You can find the **Multiple Assignments Dataview** under the Timekeeping section in your Dataview Library
    - You can filter on the External ID (is not null)
        - The **External ID** is the GWid that identifies the employee has more than one position
    - You can **group by Position** to see where are worked
    - You can select the **Share** button to export the data

Exporting Dataview Info

Export & Print

- From each Genie you can select the **Share** button
- This will export or print the information from that Genie



Running & Scheduling Reports

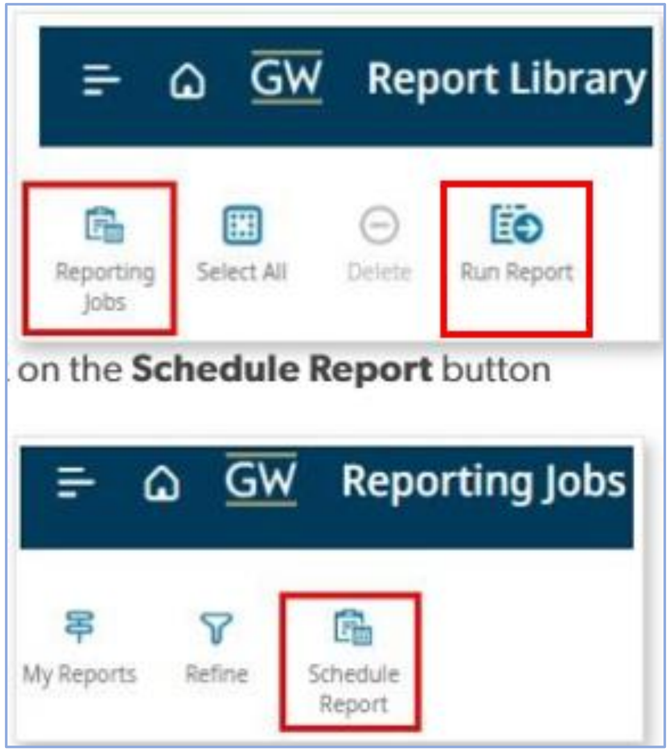
Running and Scheduling Reports

- With highly formatted and customizable layouts, reports can be scheduled to run at regular intervals and managers can be notified when a report is available.

- Depending on the type of report you are running, you will have the following options for output.
  - **PDF** - You can output reports and report elements, such as charts, or crosstabs, in PDF format.
  - **Excel-** You can output reports and report elements, such as charts, or crosstabs.
  - **Interactive** -With interactive viewer, you can customize reports based on your needs and preferences up to 200 pages.
  - **CSV output** – Save as comma-separated values (CSV) file, which allows data to be saved in a tabular format that can be used with most any spreadsheet program.

Running and Scheduling Reports

- Select the **Main Menu**
- Select **Dataviews & Reports**
- Select **Report Library**
- From the Report Library:
  - Select **Run Report** to run a report
  - Select **Reporting Jobs** to schedule a report then **Schedule Report**
- You can find **GW Pay Report** under “Custom Reports”



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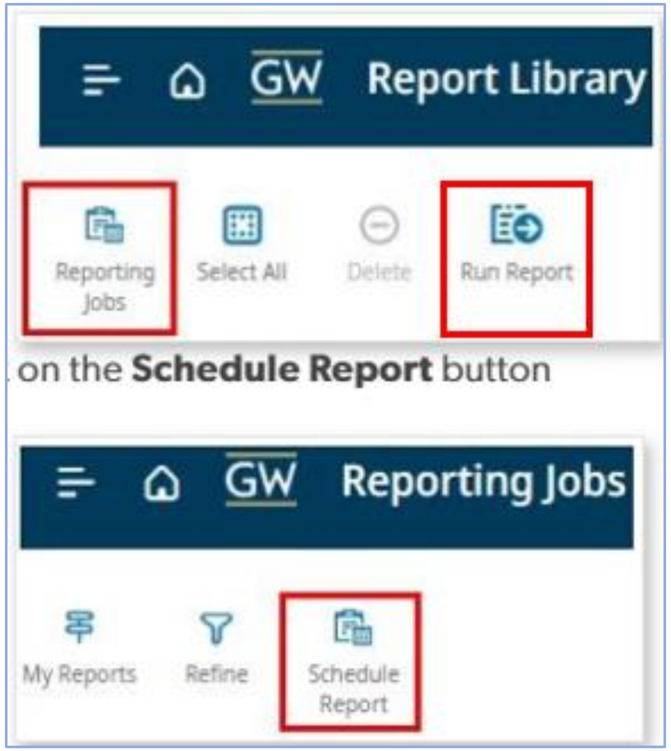
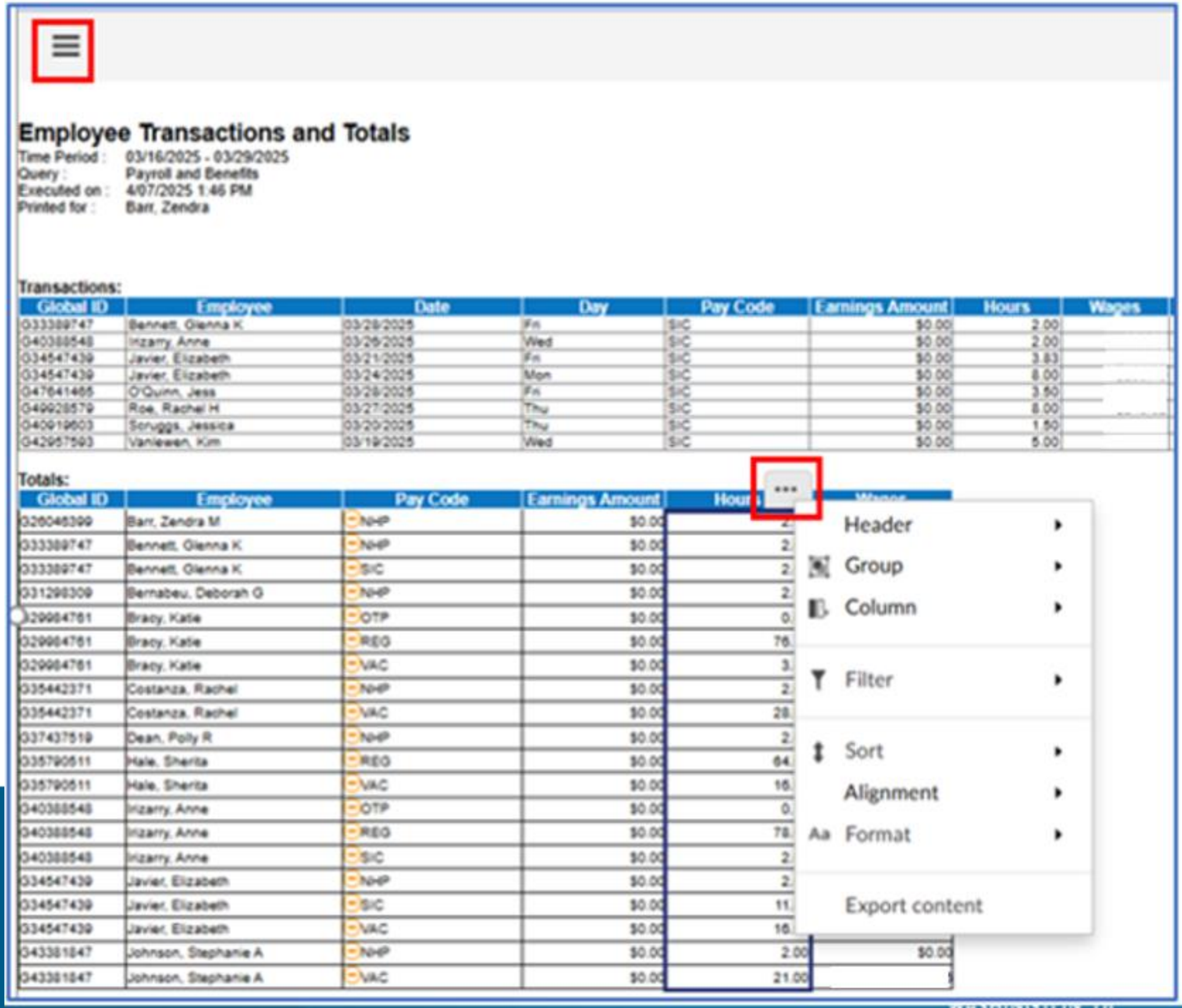
Scheduling Reports

- You can only schedule reports to send to users in your permission purview
- You can only schedule reports for users that have the same Hyperfind
- If you create a personal Hyperfind you would need to share it with that user



Interactive Reports

- After running a report with Interactive output, you can make further modifications to the report's style, formatting, and content.
- These changes can be exported to other formats, saved to the original report, or saved as a separate copy of the report depending on the settings.



Payroll Processing Reminders

Department Approval

DO NOT HOLD UP UNIVERSITY PAYROLL

- Departmental approvals are due on Tuesday at noon
- Please check [Payroll Website]for any date changes
- If you are unavailable, you must have a backup timekeeper
- Please consult with your Finance Director or manager to find an alternative timekeeper
- University Payroll can be held up if you do not approve your department's time
- If time is approved late or missed, we contact HR, Finance Director, and Head Supervisor
- We track and report late approvals to Finance Directors

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Best Practices

- ☑Employees are not allowed to work before final approval from HR
- ☑Employees should verify their job status on GWeb
- ☑Make sure employees record in and out punches using the TRS system
- ☑Non-Exempt Timekeepers should not be using their access to clock themselves in and out. They must use *phone, mobile app,* or *PC* timestamp to clock in or out.
- ☑Timekeepers should not be approving their own time cards
- ☑Supervisors should review timecards at a minimum weekly
- ☑Bi-weekly calendars can be found at https://hr.gwu.edu/payroll-calendar

Need TRS Help ?

- Email timekeeping questions to:
  - timerep@gwu.edu
- Email time off questions to:
  - timeoff@gwu.edu
- Website:
  - https://hr.gwu.edu/payroll
- Helpful Tips:
  - https://hr.gwu.edu/trs-managing-time-timekeeper
- Manager Resources:
  - https://hr.gwu.edu/manager-resources

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Thank you for Attending

It’s Question Time!!