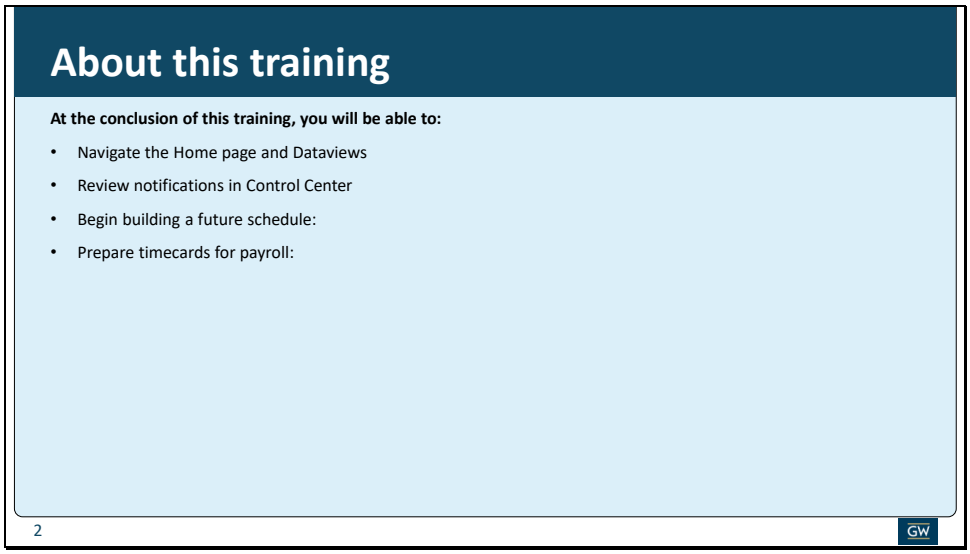
Slide 1

Learner Guide

Slide 2

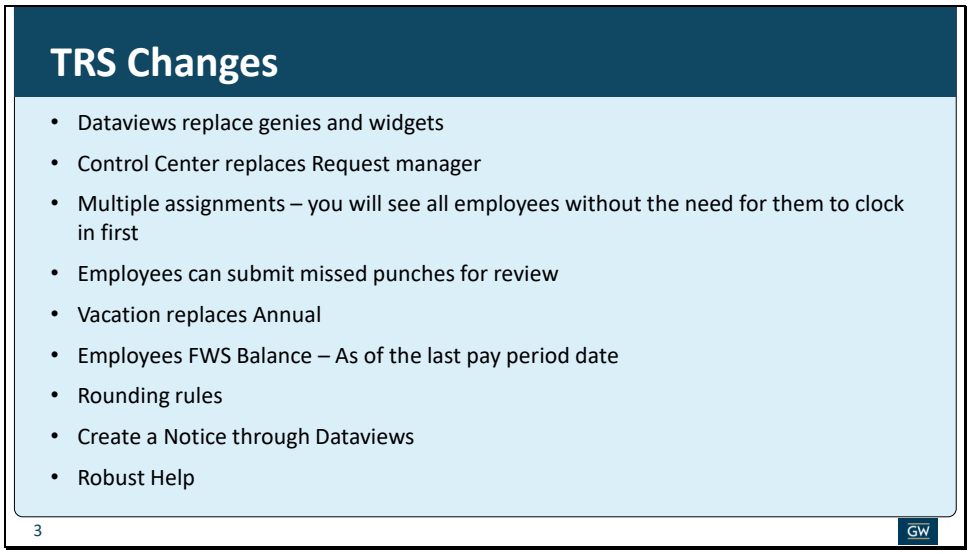


This training is designed to give you the basic skills necessary to begin using the UKG solution

Learning Objectives

- After completing this course, you should be able to:
- Navigate the Home page and Dataviews
- Review notifications in Control Center
- Begin building a future schedule:
- Prepare timecards for payroll:

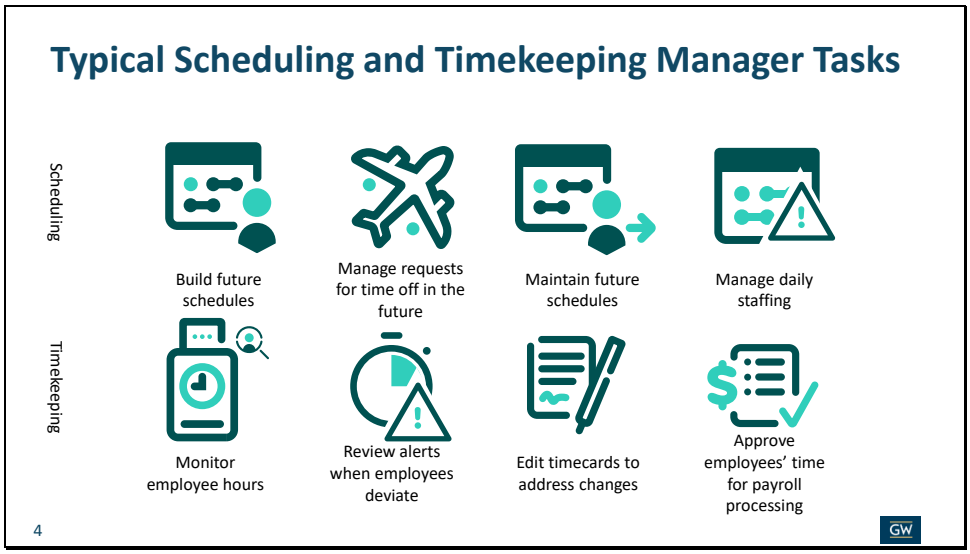
Slide 3



TRS Changes:

- Dataviews replace genies and widgets
- Control Center replaces Request manager
- Multiple assignments – you will see all employees without the need for them to clock in first
- Employees can submit missed punches for review
- Vacation replaces Annual
- Employees FWS Balance – As of the last pay period date
- Rounding rules
- Create a Notice through Dataviews

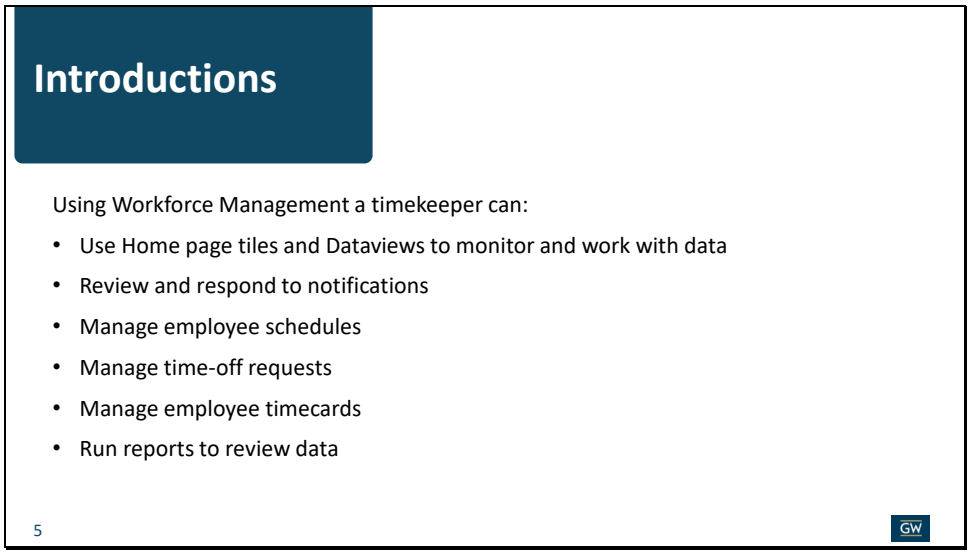
Slide 4



Timekeeper tasks often overlap between Scheduling and Timekeeping. This means that they usually must be handled daily within both modules. In this training we will see how a timekeeper:

- Interacts with tiles on the home page, and with Dataviews
- Reviews and takes action on notifications in Control Center
- Works on a future schedule
- Runs a report to evaluate a future schedule
- Edits timecards to address changes
- Approves employees' time for payroll processing
- Maintains a future schedule

Slide 5



Using Workforce Management a timekeeper can:

- Use Home page tiles and Dataviews to monitor and work with data
- Review and respond to notifications
- Manage employee schedules
- Manage time-off requests
- Manage employee timecards
- Run reports to review data

Lesson 1
Navigation & Notifications
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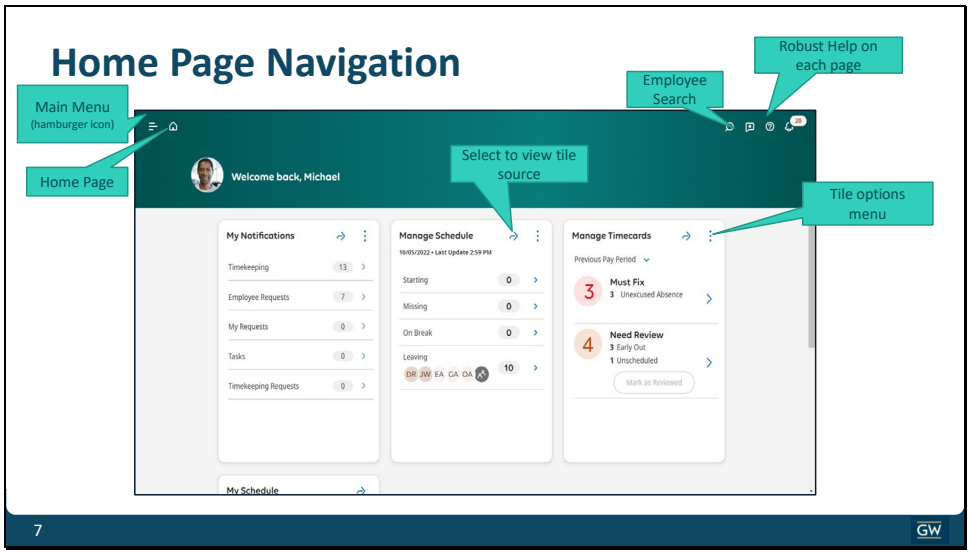
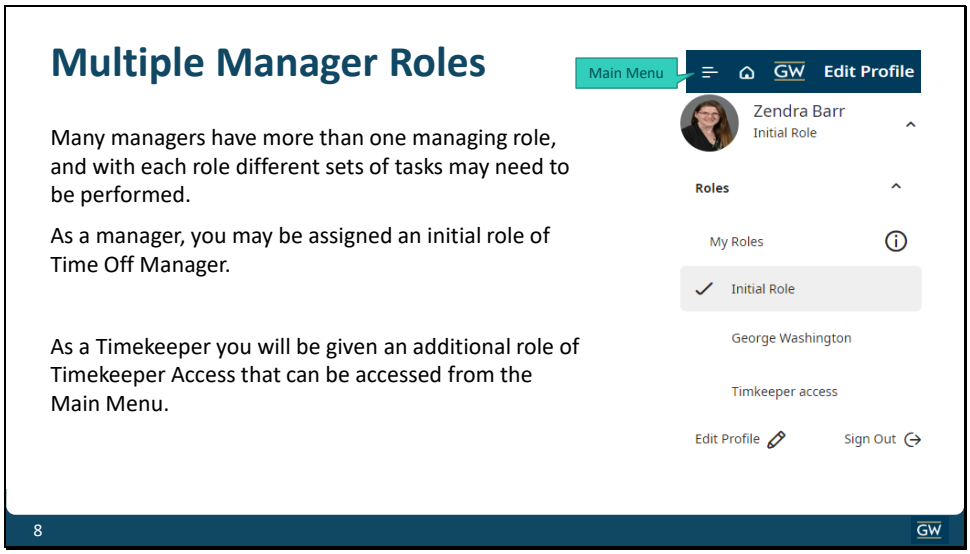


Your Home page is the first thing you will see each time you log in. On the Home page:
Take action directly in a tile.
For example:

- Use a link in tile to go to the source page for that tile.
  - Select Full Schedule to go to the Current Schedule page.
- Hide and show tiles by clicking on the **pencil icon** at the bottom of your workspace
  - For example, you can hide the **My Profile** tile to clean up your home page, and/or choose additional tiles to show.
- Use the Employee Search feature.
  - For example, you may wish to use the tool to quickly search for and access the timecard of a specific employee.
- Open the **Main Menu** to edit your profile, sign out, or access other pages.
  - For example, you can access timecards, Dataviews, and reports through the Main Menu.

You can return to the home page from any other page by selecting the **home page icon**.
Note, each page has **Question Mark button** in the right hand upper corner of each page. Select this to bring up a **robust help desk** with videos and written instructions.
Example: If you are in a Dataview and need assistance on filtering click on the help button while your in the Dataview with the filter option open and it will give you steps for the section you have open

Slide 8



Many managers have more than one managing role, and with each role different sets of tasks may need to be performed.
As a manager, you may be assigned an initial role of Time Off Manager.

As a Timekeeper you will be given an additional role of Timekeeper Access that can be accessed from the Main Menu.

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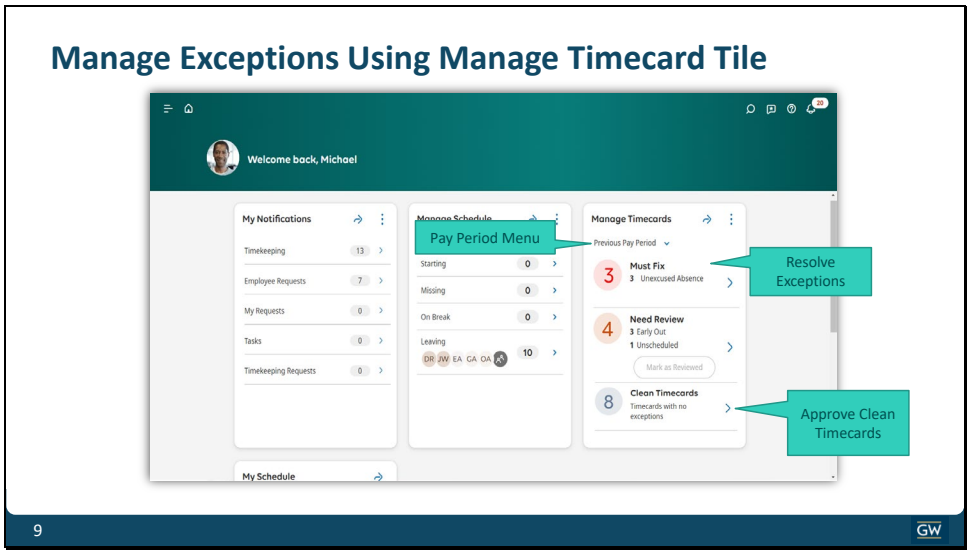
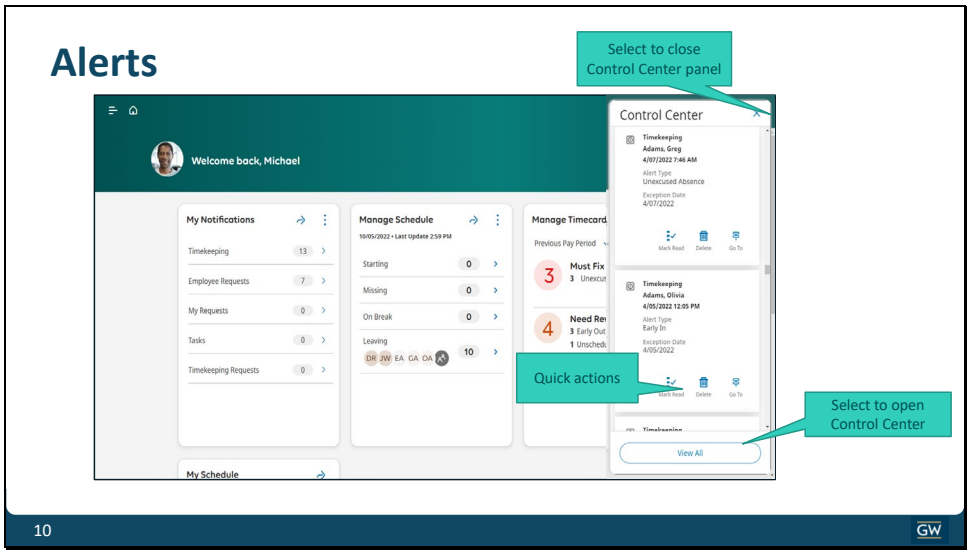


The Manage Timecard tile on the home page displays a snapshot of key information including exceptions which require your action. From the Manage Timecards tile, you can:

- Change the data displaying on the home page.
    - For Example, you can decide which pay period you need to see and use the Pay Period drop down menu to change the information that displays.
- Fix urgent exceptions.
    - For example, you can select **Must Fix** to navigate directly to exceptions that require his attention.
- Review punches.
    - For example, you can use the **Need Review** category to read and acknowledge punches that do not align with the schedule.
- Approve Timecards.
    - For example, you can access and approve only those timecards which do not have exceptions.

Slide 10



Alerts appear in the corner of all of the TRS pages. Selecting the bell icon opens the Control Center panel. With Alerts, you can:

- View the number of notifications that have not yet been reviewed or acted on.
    - For example, in the above screenshot you can see that the timekeeper has 3 notifications that have not yet been handled.
- Mark individual notifications as reviewed, or take action on appropriate notifications directly from the panel.
    - Notifications can be marked as reviewed. This will remove the notification from your panel but will stay in history to search on for a year
    - Notifications can be deleted and will be completely removed from your view
- Go to the page relevant to a notification.
    - For example, by **selecting Go To** for an Exceptions notification you can immediately open the employee's timecard with the relevant date and punches displayed.
- Select **View All** to access Control Center, where he can view notifications by category and in greater detail.
    - For example, you can see the details of a time-off request, or review older notifications you have already handled and that no longer appear in the panel.

Note, you can close the Control Center panel by selecting anywhere outside the panel.

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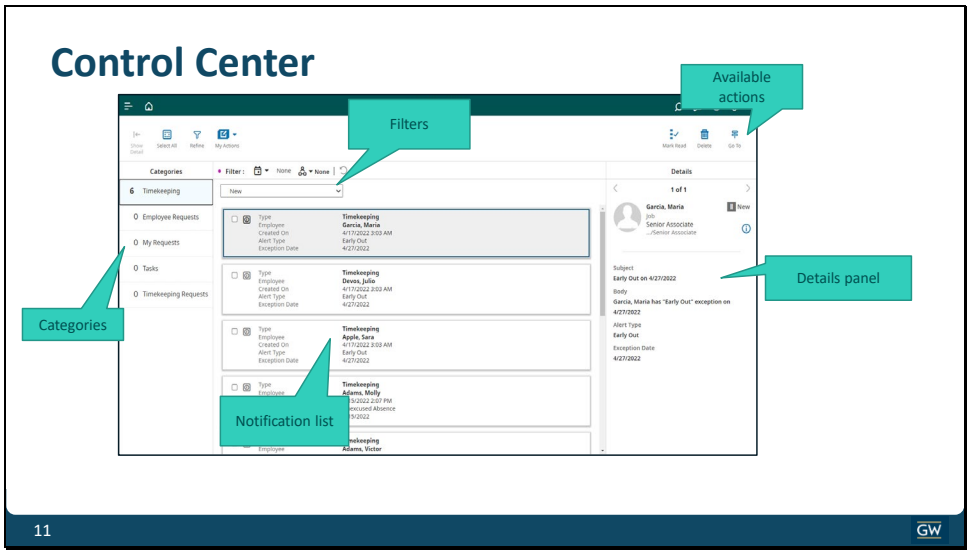

The Control Center panel provides you with a quick view of the most immediate notifications, the Control Center is where you go to view notifications in greater detail or to look up notifications that have already been handled in the past. With Control Center, you can:

- View notifications by category.
    - For example, you can review the **Employee Requests** category so you can deal with those notifications immediately.
- Filter the list of notifications.
    - For example, you can filter the notification list so that only notifications received on a certain date or dates appear.
- Review the details of the selected notification in the Details panel.
    - For example, you can review any comments or additional information submitted as part of a time-off request.
- Take action on the selected notification.
    - For example, you can use any of the action icons appearing above the Details column to approve, refuse, or otherwise handle a time-off request.

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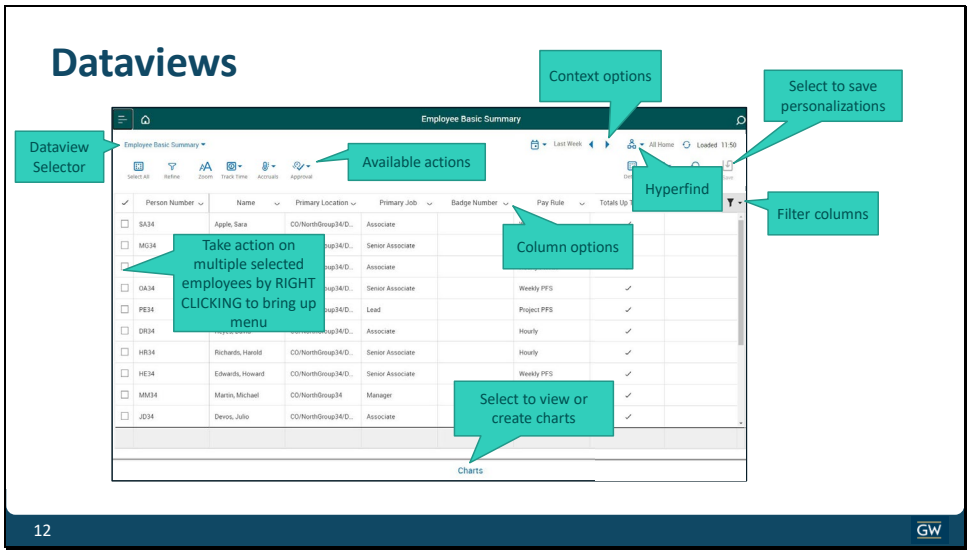

Dataviews are accessed in the Dataview Library, found in the Dataviews & Reports section of the Main Menu. You may use Dataviews to review, analyze, and act on vast amounts of data. Using a Dataview, you can:

- Take action on a selected subset of employees.
  - For example, you can select several employees and then use the Approval action to approve all their timecards.
- Sort and filter a column.
  - For example, you could filter to view only those employees with a specific Primary Job.
- Add a filter to a column.
  - For example, you could create a filter to only see student employee payrule TP21
- Create or view a chart.
  - For example, you could create a chart that displays a graph of OTP amounts

Note that you can select **Save** to keep any personalization you have made to a Dataview (**or select Restore** to go back to the default settings. You can use the Dataview selector to view a different Dataview, without having to use the Main Menu.

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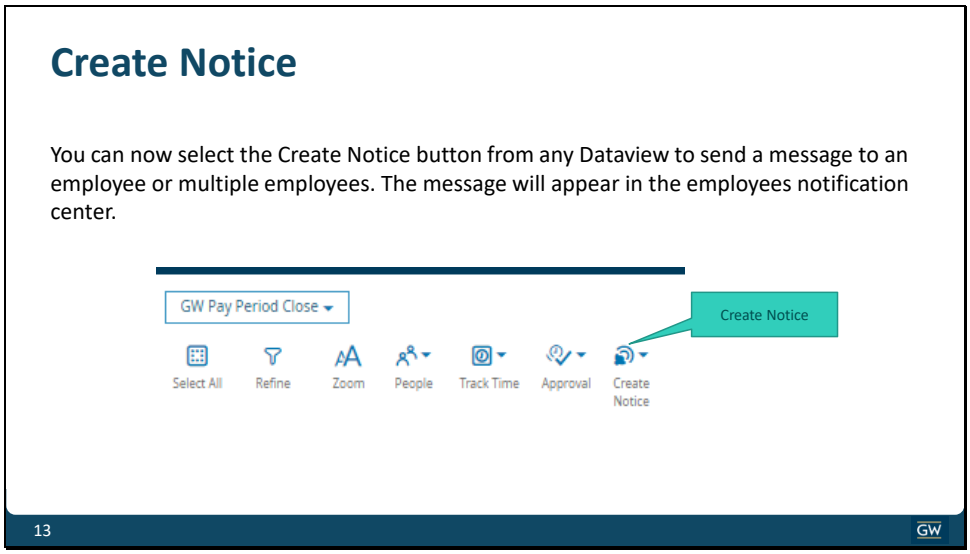

You can now select **the Create Notice** button from any Dataview to send a message to an employee or multiple employees. The message will appear in the employees notification center.

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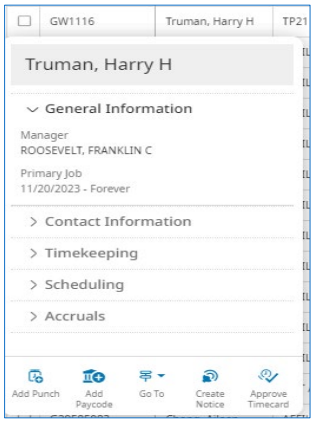
Selecting Employee from Dataview

Select any employee or multiple employees and RIGHT CLICK to activate a menu that will give you additional choices such as:

- Add Punch
- Add Paycode
- Create Notice (sends a message to the employee)
- Approve Time Card
- GoTo (to go to an additional page for that employee)



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Select any employee or multiple employees and **RIGHT CLICK** to activate a menu that will give you additional choices such as:

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- Approve Time Card
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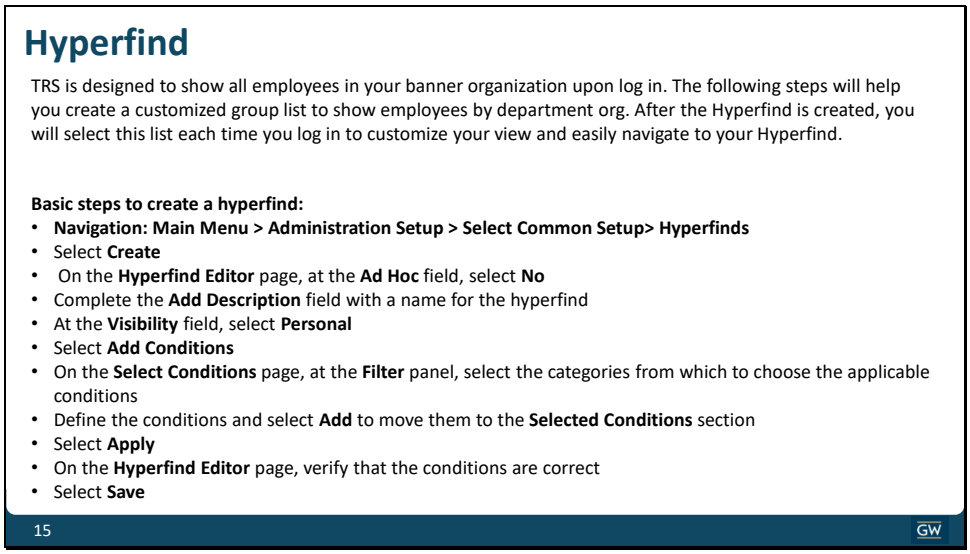

TRS is designed to show all employees in your banner organization upon log in. The following steps will help you create a customized group list to show employees by department org. After the Hyperfind is created, you will select this list each time you log in to customize your view and easily navigate to your Hyperfind

Below are basic steps to create a hyperfind. In the near future we will be holding Hyperfind classes.

Basic steps to create a hyperfind:

- **Navigation: Main Menu > Administration Setup > Select Common Setup> Hyperfinds**
- Select **Create**
- On the **Hyperfind Editor** page, at the **Ad Hoc** field, select **No**
- Complete the **Add Description** field with a name for the hyperfind
- At the **Visibility** field, select **Personal**
- Select **Add Conditions**
- On the **Select Conditions** page, at the **Filter** panel, select the categories from which to choose the applicable conditions
- Define the conditions and select **Add** to move them to the **Selected Conditions** section
- Select **Apply**
- On the **Hyperfind Editor** page, verify that the conditions are correct
- Select **Save**

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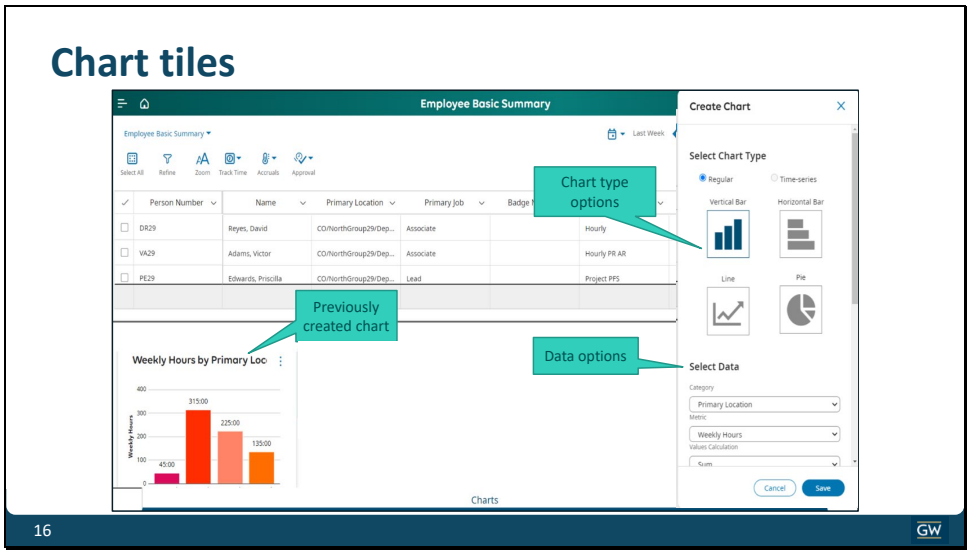

Charts are viewed and created by selecting Charts at the bottom of a Dataview. The data in the chart will come directly from that Dataview and will dynamically update to reflect any changes to data in that Dataview. You can use charts to get a quick visual representation of the data of which you're most concerned with. You can select the type of visualization you prefer (for example, a Pie chart or a Line graph), and can specify what metrics and values to display. After creating a chart, you can add it as a tile on his home page.

To Create a Chart:

- Access the appropriate **Dataview**.
- Select the **Chart** add-on.
- On the Chart add-on, select the **Tile Library** icon.
- On the Tiles slider, select the **Create Chart** icon.
- Specify the category and metrics to display.
- Select **Save**.
- On the Home page, select the **Tile Library** icon.
- Select the chart, then select **Apply**.

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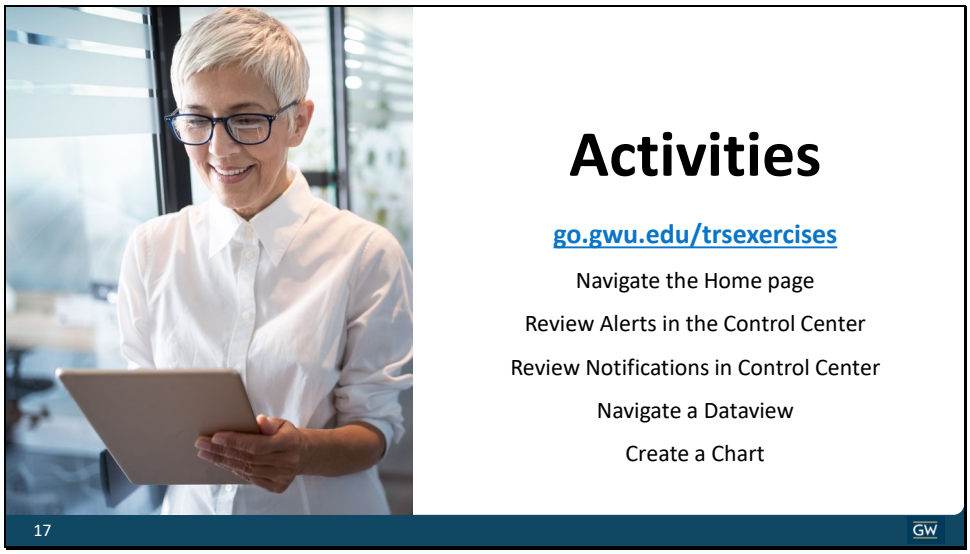

Between each lesson you will see this Actives slide. If you have time you can use the test database that will walk you through the steps you learned in each lesion.

Lesson 2
Scheduling
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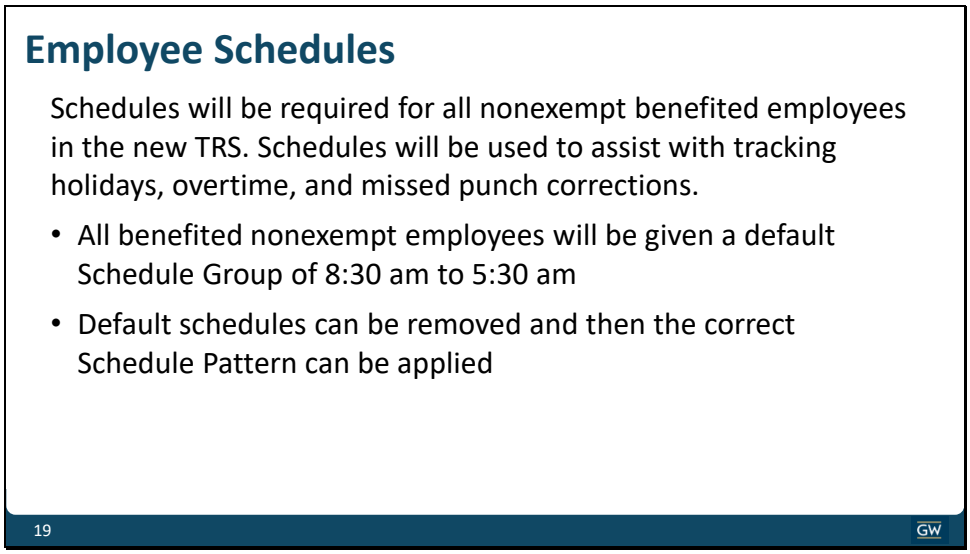
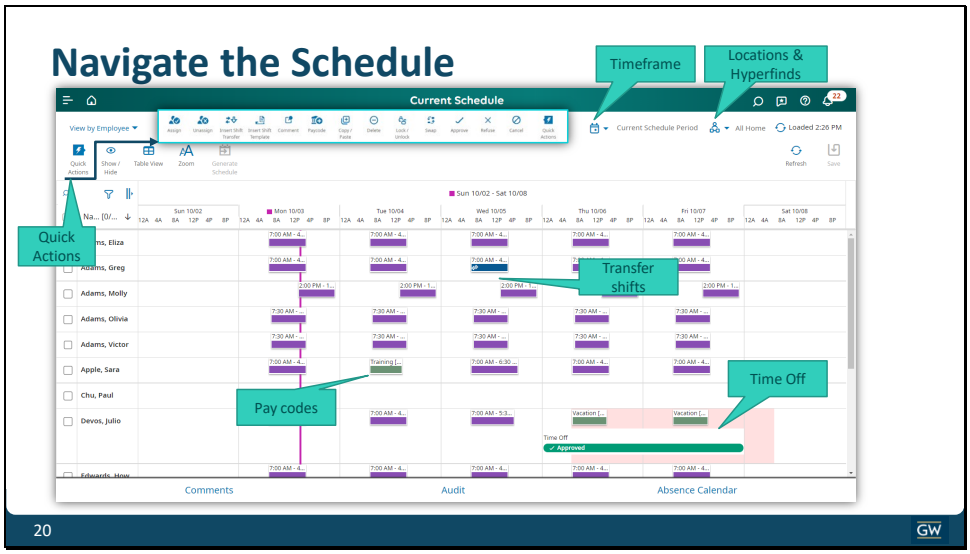
GW



Schedules will be required for all nonexempt benefited employees in the new TRS. Schedules will be used to assist with tracking holidays, overtime, and missed punch correction.

- All benefited nonexempt employees will be given a default Schedule Group of 8:30 am to 5:30 am
- Default schedules can be removed and then the correct Schedule Pattern can be applied

Slide 20



Navigating the Schedule

The current schedule allows you to view, modify, evaluate, and create employee schedules. The basic form of the schedule is a grid with rows representing employees and columns representing units of time. The grid is packed with interactive graphic information on employees, assigned shifts, open shifts, holidays, employee availability, vacations, sick days, and much more.

Scheduler provides grouping strategies, templates, recurring patterns, and automatic schedule generation to keep scheduling effort to a minimum.

Collapsible columns next to the employee name column and tabs at the bottom of the grid to provide additional information for managing the schedule.

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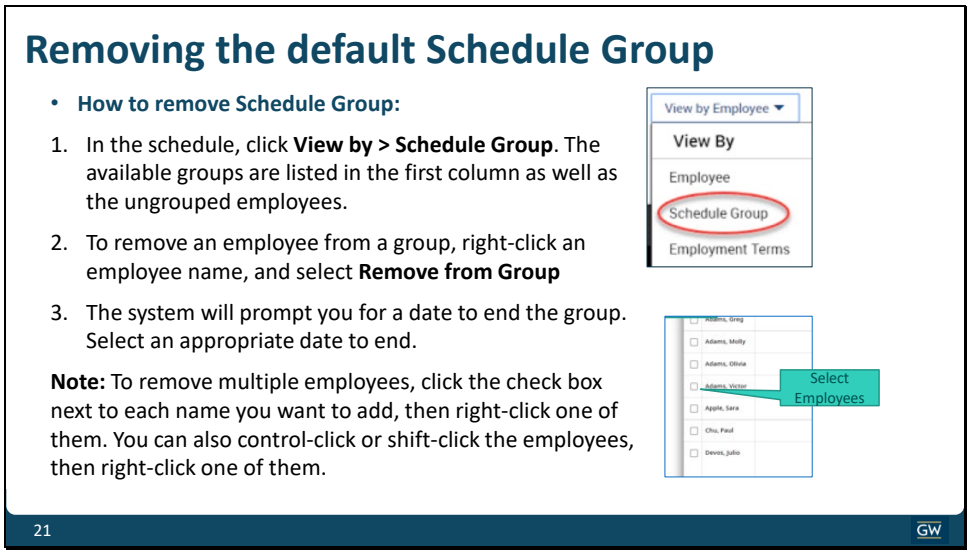

Before you add an employee pattern you will need to remove the default Schedule Group assigned to the employee.

- In the schedule, click **View by > Schedule Group**. The available groups are listed in the first column as well as the ungrouped employees.
- To remove an employee from a group**, right-click an employee** name, and select **Remove from Group**
- You will be prompted for a date, please select appropriate date to end the group.

Note: To remove multiple employees, click the check box next to each name you want to add, then right-click one of them. You can also control-click or shift-click the employees, then right-click one of them.

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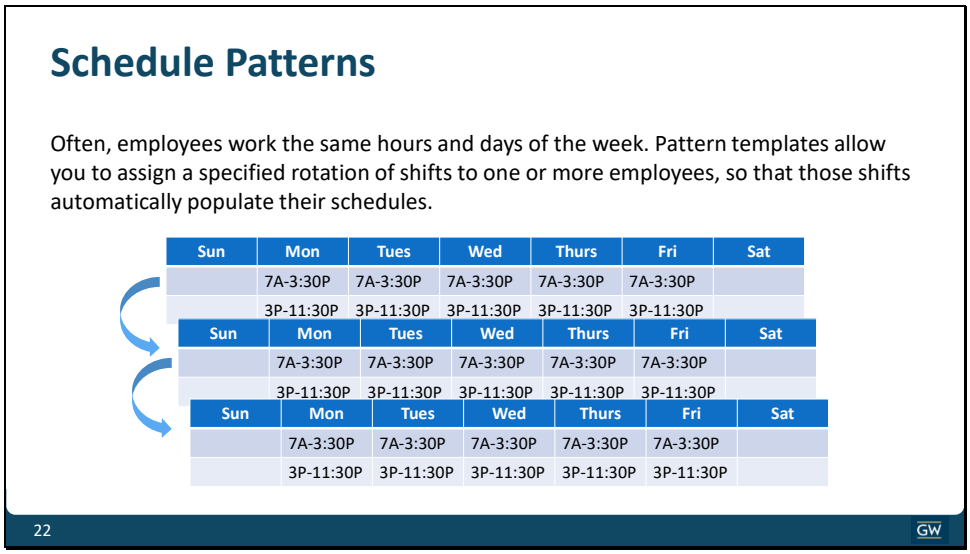

Often, employees work the same hours and days of the week. Pattern templates allow you to assign a specified rotation of shifts to one or more employees, so that those shifts automatically populate their schedules.

Example: an employee has a two-week schedule of alternating shifts:

- One week: 7:00 a.m. – 3:30 p.m., Monday – Friday
- Next week: 3:00 p.m. – 11:30 p.m., Monday – Friday

Their manager can assign a schedule pattern template to them so that their schedule will remain in place.

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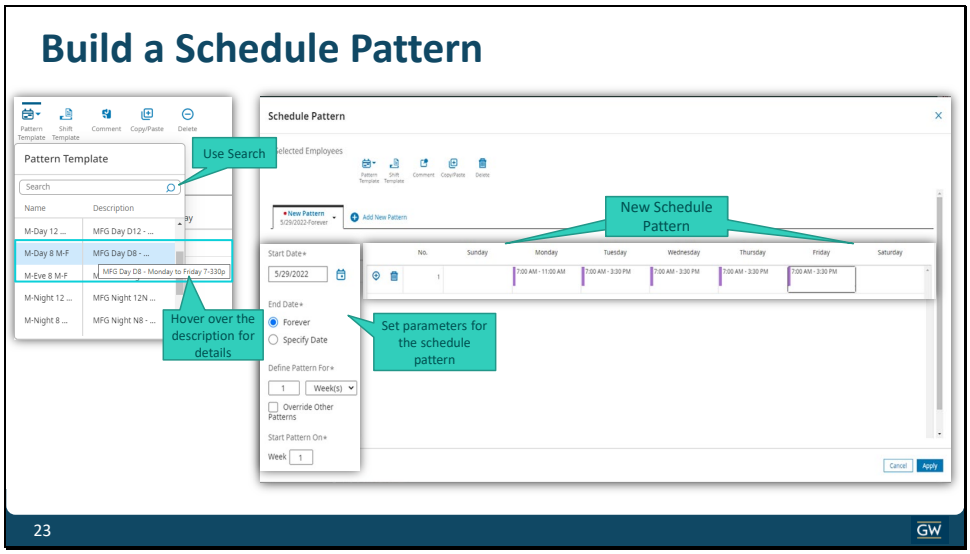

Pattern Template Menu : The pattern template menu does not display the entire description. Users can hover over the description row to see more details

You can create a schedule pattern using a new pattern or a pre-defined shift template for a single employee, multiple employees, a schedule group, or employees sharing the same employment terms.

Verify that the parameters are appropriately set. This includes the start date and end date fields. Normally you can use the start of a pay period for the start date.

Select the Override Other Patterns box if the new schedule pattern will replace pre-existing patterns.

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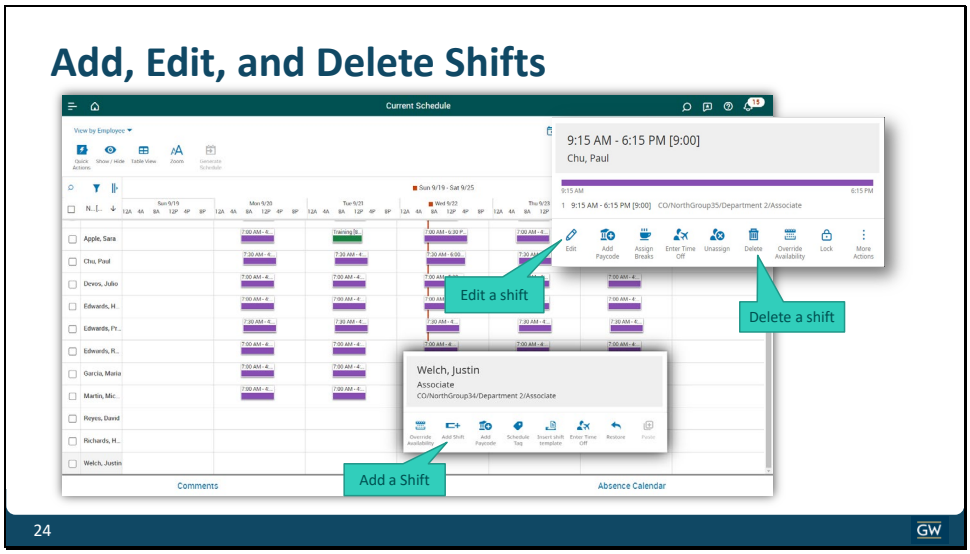

To modify a schedule, you can:

- Edit existing shifts when changes are necessary.
  - For example, you can change the end time if an employee agrees to stay later than scheduled.
- Add an ad hoc shift or use quick actions to add a pre-defined shift.
  - For example, you can add hours to an employee's schedule when extra hours are needed to fulfill a business need.
- Delete a shift.
  - For example, you can remove scheduled hours from an employee's schedule if he or she is not needed on that day.

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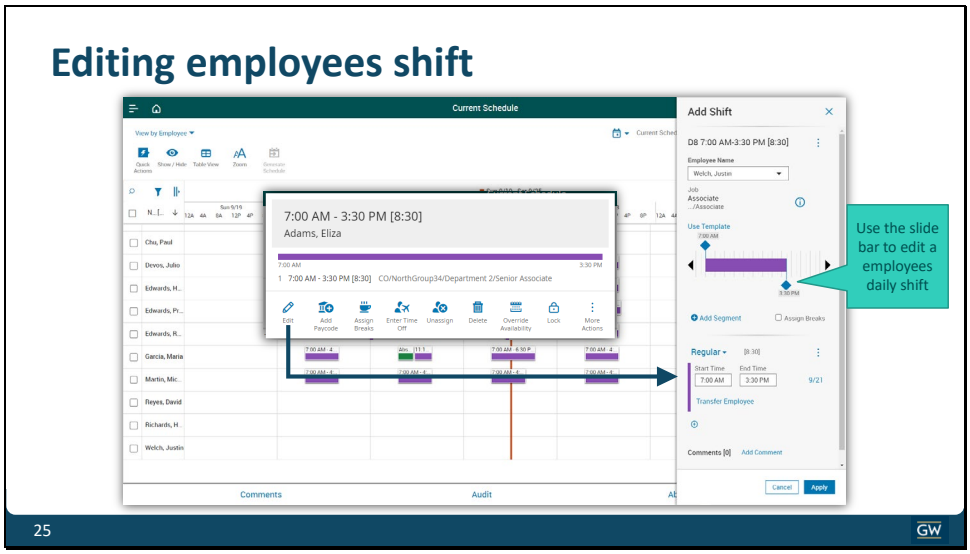

You can add or edit a shift after it has been scheduled.

- You can right click on a shift and select edit. A box will appear allow you to drag and edit the shift or manually update the shift times.

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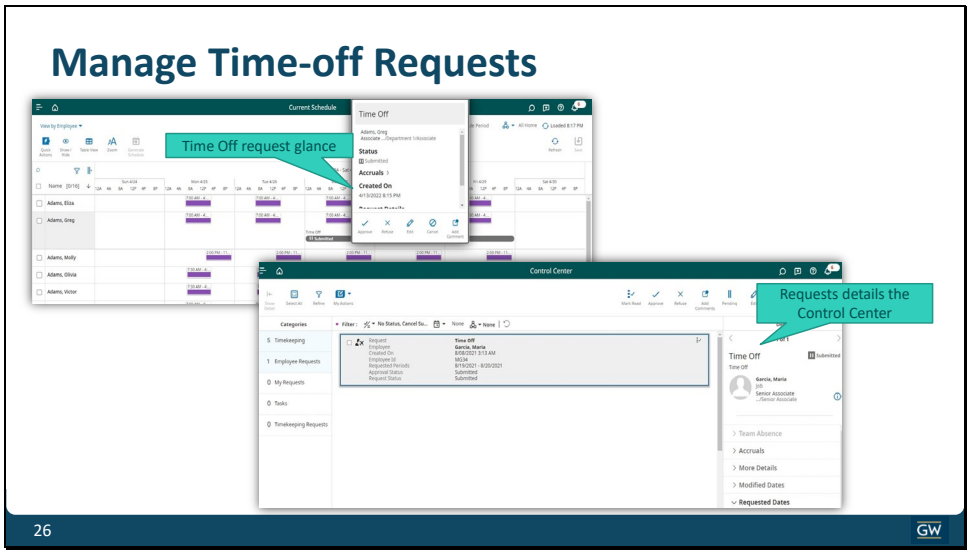

When employees submit time-off requests, managers can review, approve, or reject those requests in the Control Center using My Notifications or while in the schedule using the Absence Calendar. To learn about all the Time Off features please register for a Time Off training.

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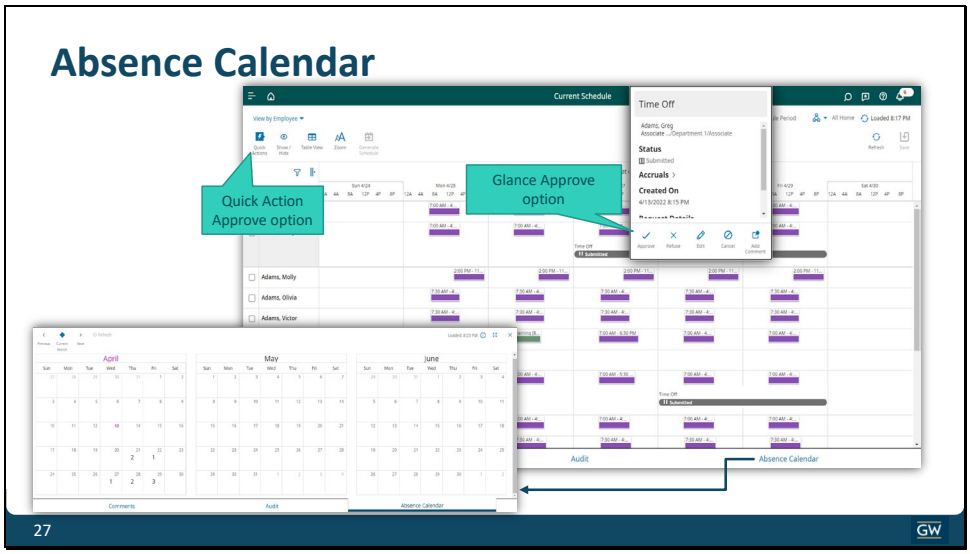

The Absence Calendar provides details on the number of employees who are taking time off. Numbers on the calendar indicate the number of employees who have time off on that particular day. To learn about all the Time Off features please register for a Time Off training.

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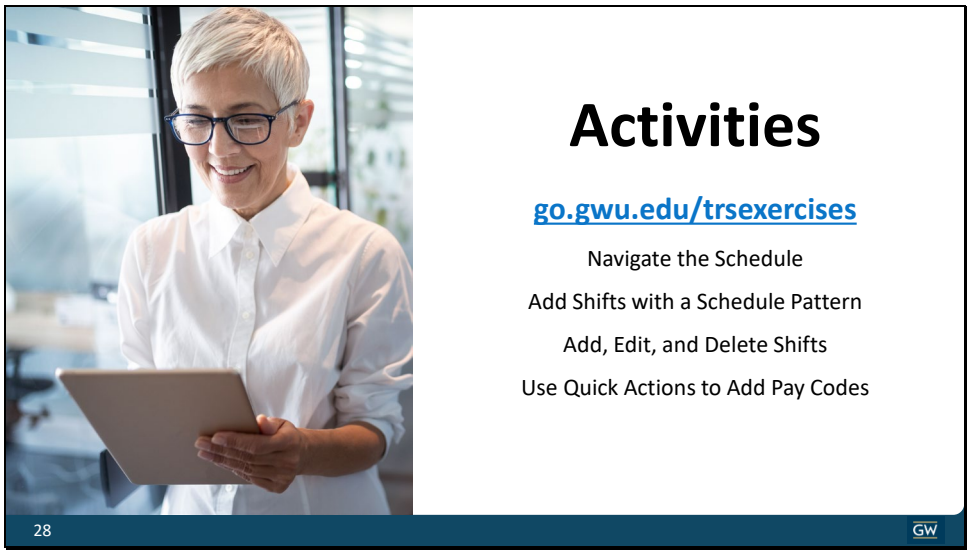

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Lesson 3
Timekeeping
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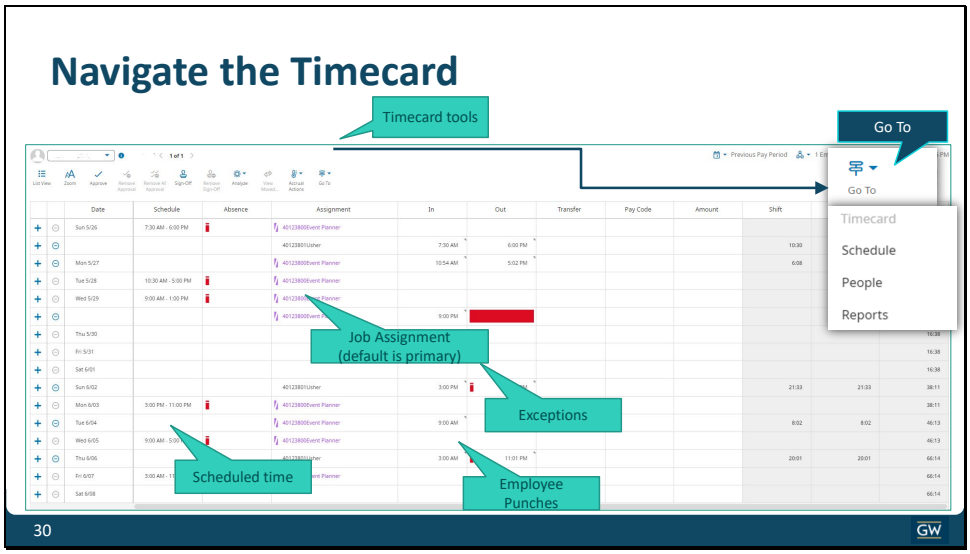

The Employee Timecards page includes timecards for the employees selected from the Employee Summary page or from the main menu. The timecard displays an employee's schedule time, Assignments if the employee has more than one bi-weekly position, punch in and punch out times, and any exceptions which are deviations from the employee's scheduled time.

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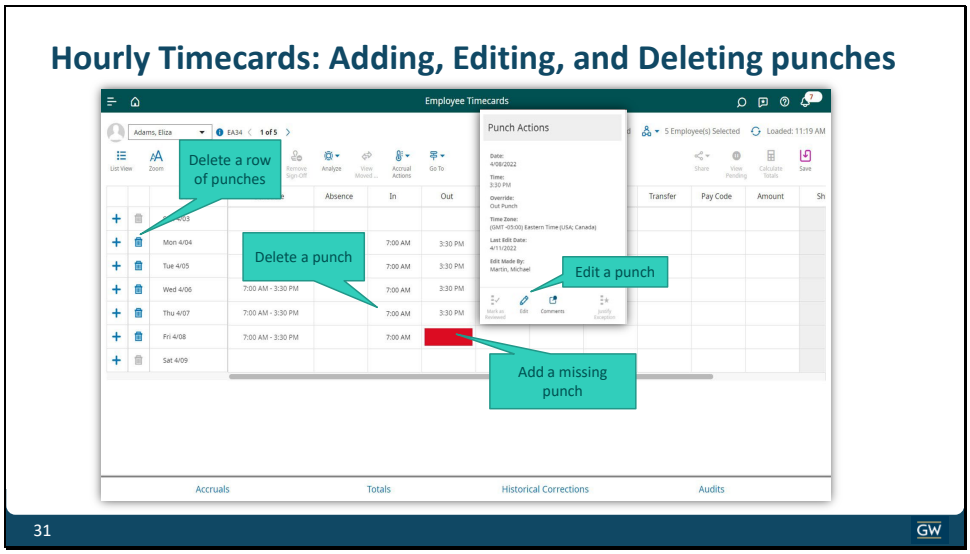

As a timekeeper you can:

- Add a missing punch by selecting a cell and entering the applicable time.
    - For example, if one of your employees forgets to punch out and calls you to add the missing punch.
- Edit an existing punch by selecting a cell and making the applicable edits. Note that when you edit a punch, a black triangle will appear in the cell to indicate an edit was made.
    - For example, if you edit an out punch when an employee agrees last minute to return to work for an extra hour.
- Delete a row of data from the timecard by selecting the Delete icon.
    - For example, hours were erroneously scheduled on a day the employee does not work and populated a row on that employee's timecard. You can delete that row and add a detailed comment.
- Delete a single punch by selecting the applicable punch and pressing Delete on your keyboard.
    - For example, an employee punched out by mistake and then returned to work. As a timekeeper you can delete that out punch with a detailed comment received by the employee.

NOTE: Make sure you add detailed comments from the employee with the reason for the change for every edit you make.

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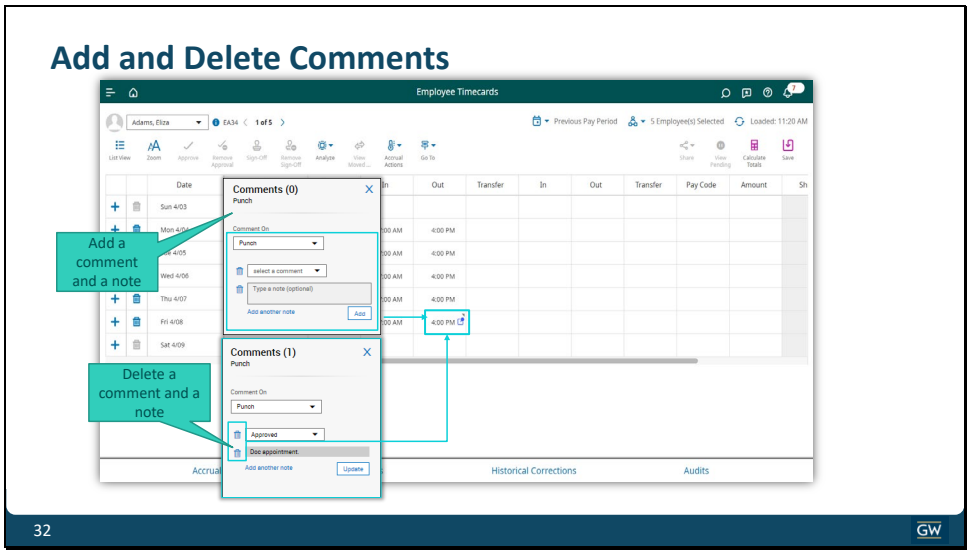
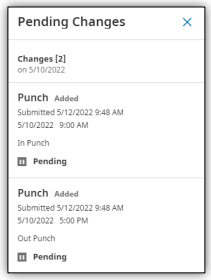


It is recommended that any time you edit a timecard, you add a comment in the cell that contains the edit for record-keeping purposes. You can also add comments to exceptions and punches, if appropriate. Comments can be edited and deleted. Make sure you add detailed comments from the employee with the reason for the change for every edit you make. Always make sure comments are business like and only have the important info needed. Comments are stored in the audit trail and can be viewed by everyone with access to the time card.

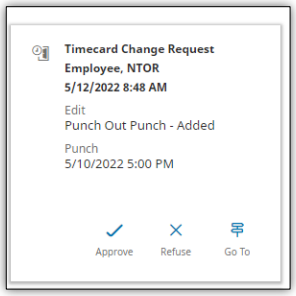
Slide 33

Employees Ability to Submit Missed Punch Corrections

- Employees will be able to submit timecard changes.
- Managers will receive a notification in the control center where the timecard change be approved or refused these changes.
- Timekeepers can choose to accept or refuse the timecard change request.



Pending Changes Visible from Timecard



Manager Approval from Control Center or Timecard

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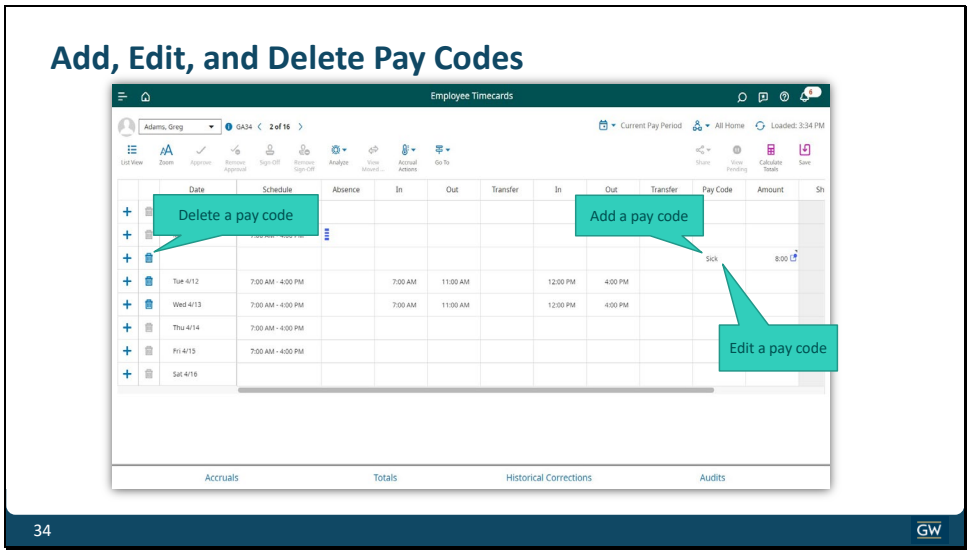
Employees will be able to submit timecard changes. Managers will receive a notification in the control center where the timecard change can be approved or refused.
For example, you have an employee that forgot to punch in and punch out. The employee submitted a timecard correction for the missed punches. A notification is set to the assigned manager and the timekeeper can also view the request. The notification van be viewed on the Timecard Change request for the in punch and the out punch. Timekeepers can choose to accept or refuse the timecard change request.

Slide 34

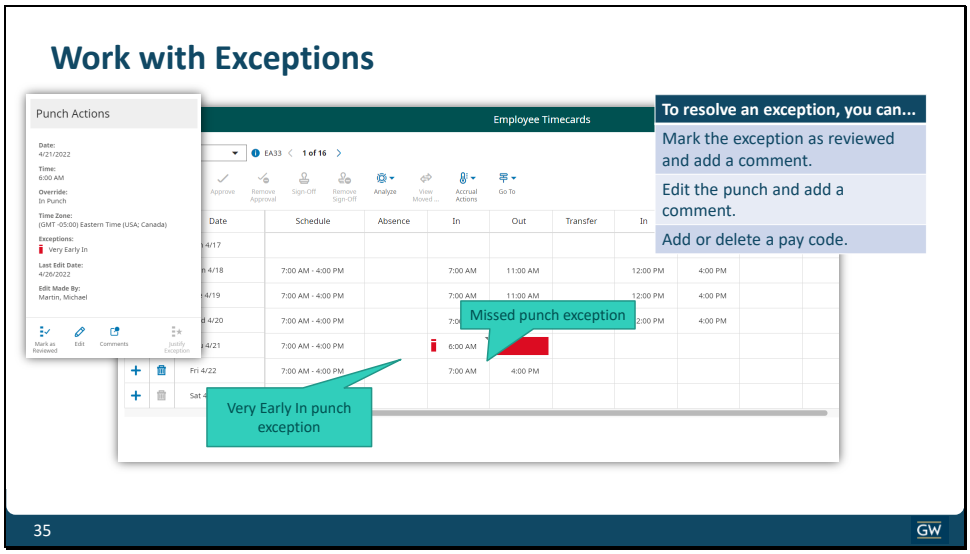


Using pay codes, you can:

- Add a pay code to establish a different pay type for worked or non-worked hours such as voting or University clocking. Normally you will receive an email from Payroll Services when pay code other than time off pay codes needs to be manually entered. Time Off paycodes should only be entered through the Time Off workflow for regular employees.

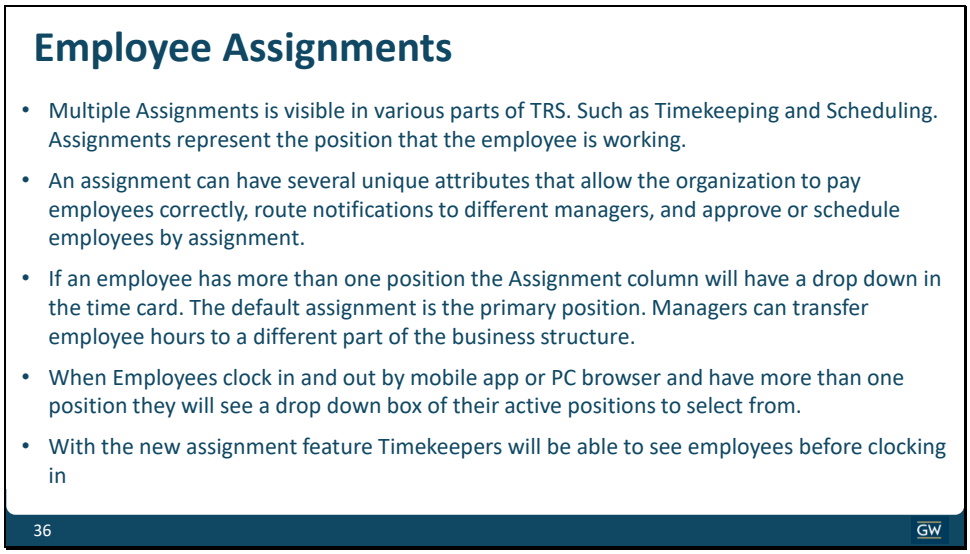
- **Note:** Pay codes cannot be added to a row with punches. If both are needed on the same day, add a row for that day to enter the pay code information.)

Slide 35



Exceptions are generated in timecards when there is a deviation from the employee's scheduled hours. For example, if an employee is scheduled to work from 7:00 a.m. to 5:00 p.m., but leaves work at 4:30 p.m., an exception may be generated.
As exceptions appear in employee timecards, a manager may be expected to resolve those exceptions by marking the exceptions as reviewed, editing the punch, or adding or editing a pay code.

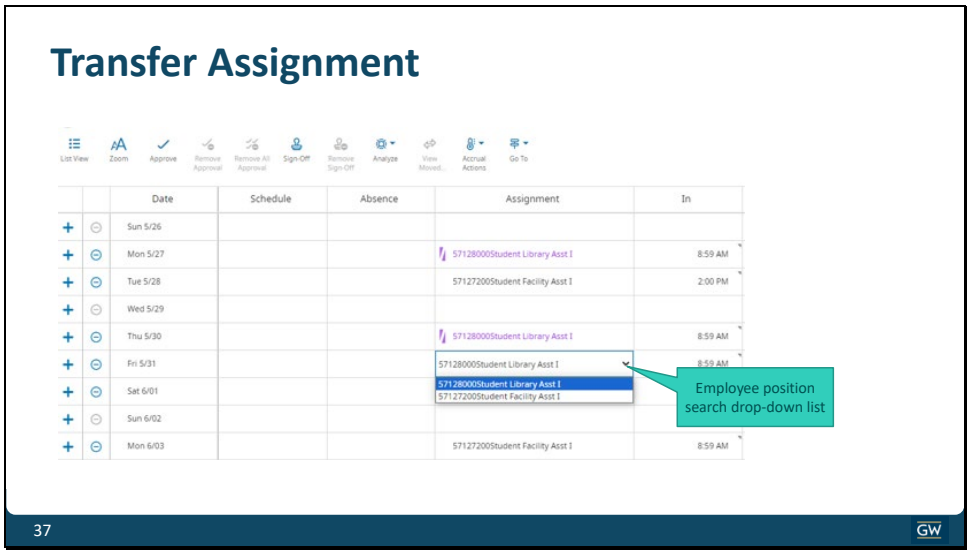
The only exception that will stop the employees time card from being processed is a missed punch exception.



The new feature, called Multiple Assignments, is visible in various parts of the new Time Reporting System. Such as Timekeeping and Scheduling. Assignments represent the position that the employee is working.

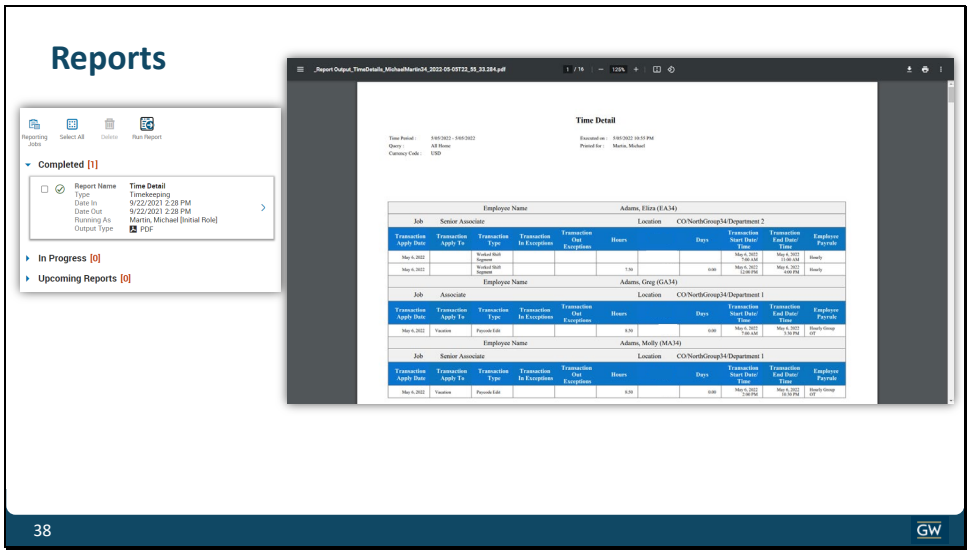
- An assignment can have several unique attributes that allow the organization to pay employees correctly, route notifications to different managers, and approve or schedule employees by assignment.
- If an employee has more than one position the Assignment column will have a drop down in the time card. The default assignment is the primary position. Managers can transfer employee hours to a different part of the business structure.
- When Employees clock in and out by mobile app or PC browser and have more than one position they will see a drop down box of their active positions to select from.
- With the new assignment feature Timekeepers will be able to see employees before clocking in

Slide 37



If an employee has more than one position the Assignment column will appear in the time card. The default assignment is the primary position. Managers can transfer employee hours to a different position.

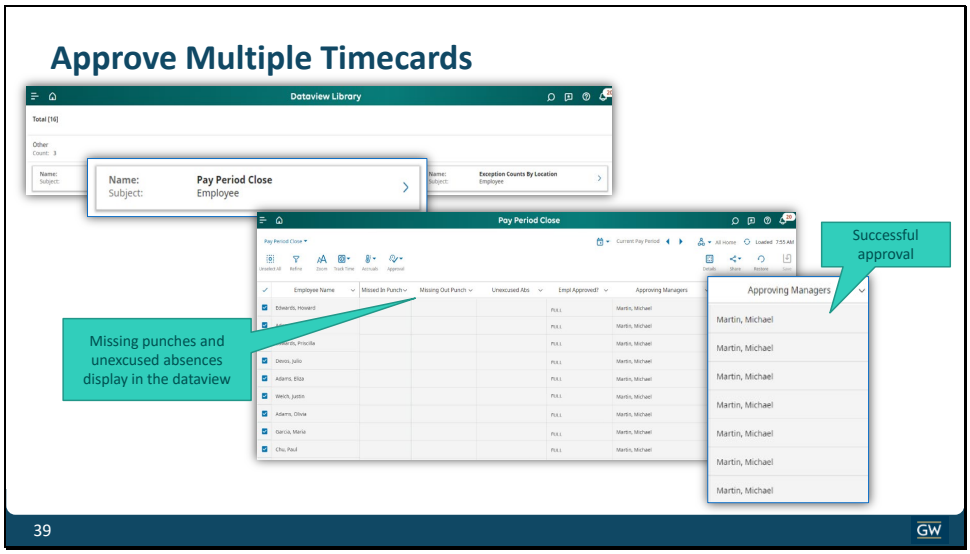
Slide 38



Depending on their access, managers can run several reports that provide them with important information that helps them monitor schedules and other manager tasks. For example, managers can run the GW Pay Report or Time Detail report to review totals for a pay period.

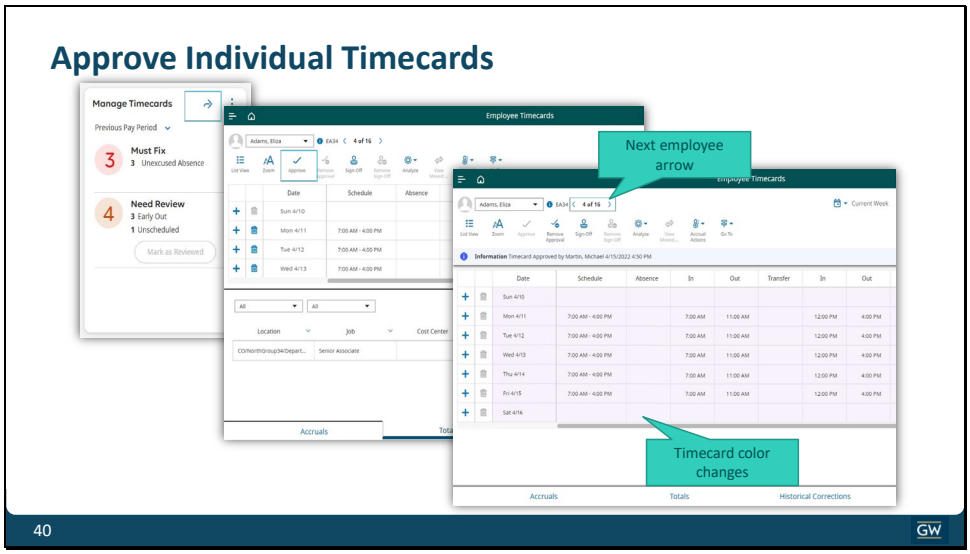
Access the Report Library to see the reports that are available to you.

Slide 39



Timecards can be approved as a group. Access the GW Pay Period Close Dataview to review exceptions, select the employees to include in the group approval and approve multiple timecards.

Slide 40



Managers can approve timecards individually. For example, at the end of the pay period, you can access the timecard for one employee. After addressing any timecard errors, you can approve the timecard. After submitting your approval, the timecard changes color.

Slide 41

Between each lesson you will see this Actives slide. If you have time you can use the test database that will walk you through the steps you learned in each lesion.

Lesson 4
Summary
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GW

Summary

You should now be able to:

- View and customize the Home page and Dataviews
- View and respond to notifications
- Begin building a future schedule
- Prepare timecards for payroll

GW
Questions?
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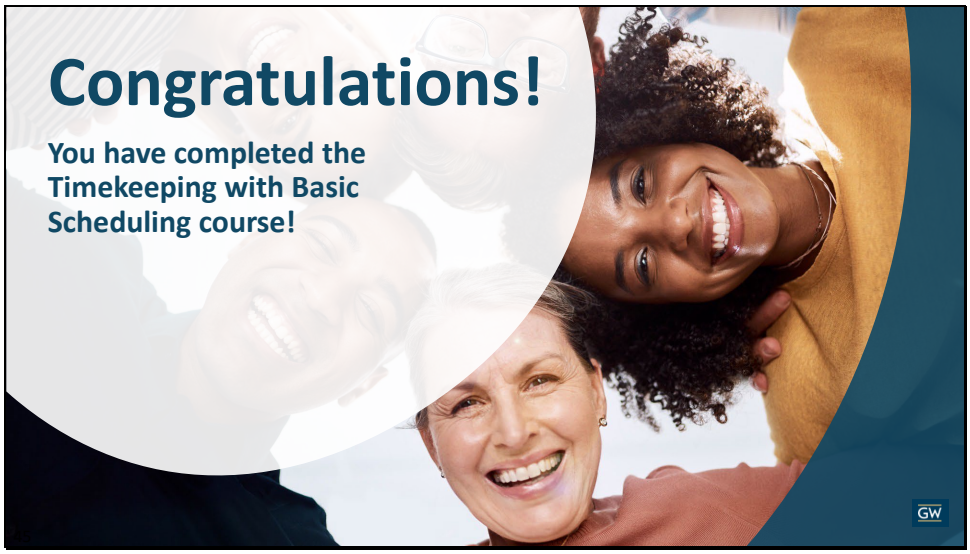
Congratulations!
You have completed the Timekeeping with Basic Scheduling course!
GW