Workforce Timekeeper™ v8.0
Managing Timecards and Schedules

Practice Exercises
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Using the Workforce Timekeeper Interface
Using the Workforce Timekeeper Interface

There are no exercises for this lesson.

Basic Navigation

Logging on and off

Guide Me: Logging on and off Workforce Timekeeper

As a department manager you need to regularly log on to Workforce Timekeeper to perform tasks. Log on to the Workforce Timekeeper application.

1. From the desktop, double-click the Navigator Framework_wfc icon.
2. Log on as the payroll manager with the following credentials:
   - User Name: cfryman
   - Password: cfryman
3. Click the Log On icon or press the Enter key.
4. The department manager’s default navigator appears.
5. When finished, click Sign Out to exit the application.

Getting around Workforce Timekeeper

Guide me: Navigating in the Application

Navigate the navigator configured for your role.

1. Log back on to Navigator Framework_wfc as the department manager with the following credentials:
   - User Name: cfryman
   - Password: cfryman
2. Close and open the Related Items pane.
3. Select Exceptions and drag it to the Manage My Department workspace.
4. Within the Exceptions widget, click the Maximize button in the upper-right corner of the widget. Then, click the Restore Down button.
5. Click the gear icon and select Close.
6. In the Related Items pane, select Reports.
7. Click the x in the upper-right corner of the tab to close the item you opened in the temporary workspace.
8. From the Related Items pane, select Help.
Managing Timecards and Schedules

10. After exploring, click **Restore Down** and then close the **Help** temporary workspace. (Click the x in the upper-right corner of the tab.)

11. From the **Genie** widget, select the **Worked Accounts** Genie.

12. Use the **context selector** to select **Current Pay Period** and **Cost Center 404**.

13. Confirm that the list of accounts contains only **Cost Center 404**.

14. Click the exclamation mark alert with a number on it.

15. Click the first item in the list.

16. After reviewing the **Exceptions** widget, click the x on the tab to close it.

17. Back in the **Worked Accounts** Genie, use the **Context Selector** to update the Time Frame to **Week to Date**.

18. Confirm that the time frame in the widget has been updated.

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**Searching for Employees Using Employee Search**

**Guide me: Searching for Employees using Employee Search**

You want to review an employee’s timecard and schedule. Use the Navigator Employee Search feature to locate this information.

1. Click the **Search** icon.

2. In the **Search** field, enter *jac* and notice that as you do so, the application locates three employees who have the letters jac in their names. Select **Joseph Jacobs**.

3. In the **Results** pane, review all of the information about Joseph Jacobs. Scroll down and review his rules and profiles information.

4. With Joseph’s record displayed, click the GoTo control and select Timecards.

5. After you review the employee’s timecard, close the temporary workspace.

6. Click the X to the right of the search field to clear the search results.

7. Next, search for employees by location. In the Search field, enter *loc* and select Location.

8. In the Results pane, select Organization/MFG/SE/Miami/Olsen/FT/Test from the Show drop-down list. The Search results include all of the employees who are assigned to the Test location.

9. Click the X to the right of the Search field to clear the search results. Above the Search field, select the On option to activate Hints.

10. Find all employees assigned to the Part Time pay rule. From the Hints list, select Pay Rule and then select Part Time.

11. After you view the results, close the temporary workspace.

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**Time data basics**

No exercises for this lesson.
Accessing employee data using Workforce Genies

About Workforce Genies

Guide me: Filtering and sorting in the Genie widget
As a payroll manager you need to regularly log on to Workforce Timekeeper to perform payroll processing tasks. The sorting and filter options within Genies can help you locate the employee data that you need to perform your tasks.

1. From the Manage My Department workspace, select the Pay Period Close Genie.
2. Review the context selector to verify that Previous Pay Period and All Home are selected. Make adjustments as needed.
3. To filter on a component of an employee name, click the Filter icon.
4. From the Name column, in the text box, enter part or all of the last name Johnson to isolate all employees with the last name Johnson.
5. After you complete all applicable tasks, to remove the filter, click Filter.
6. To sort a column, like the Missed Punch column, click the column header twice.
7. Hover your cursor in the Missed Punch column header and click the down-facing arrow and select Group by this Column.
8. Click the Collapse all groups icon.
9. Click it again to expand the groups.
10. In the Missed Punch column, click the down-facing arrow and select Remove from groups to remove the grouping.
11. Click the down-facing arrow and select Sort Ascending to sort the column in ascending order.

Guide me: Using Genies to access employee timecard and people data
As a payroll manager, you may have to back up the department manager by checking employee timecards for the previous pay period to identify irregularities such as missing punches, early ins, and late outs. Use the Reconcile Timecard Genie to review employee timecards.

1. From the Genie widget, access Reconcile Timecard.
2. In the Reconcile Timecard Genie, confirm that All Home and Previous Pay Period appear in the context selector. Make adjustments as needed.
3. Sort the Unexcused Absences column by clicking the column header two times.
4. Select the employees with unexcused absences, click the GoTo control, and then select Timecards.
5. Use the **Next Employee** button to view each timecard.
6. After reviewing the timecards, close **Timecards** workspace.
7. In the **Reconcile Timecard** Genie, select the first employee in the list, then select **People > Edit**.
8. Briefly review the employee’s **People** record.
9. When finished, close the **People Editor** temporary workspace and return to the **Reconcile Timecard Genie**.
10. Review the other **Action** bar menus and tasks.

## Using reports

### Running and viewing reports

**Guide me: Generating an Employees Currently Earning Time (On Premise) report**

On a daily basis, the department manager runs the Employees Currently Earning Time (On Premise) report to quickly determine which employees have reported to work that day. In your role as a back-up to the department manager, generate the Employees Currently Earning Time report for All Home employees.

1. From the **Related Items** pane, click **Reports**.
2. On the **Select Reports** tab, expand the All category and select the Employees Currently Earning Time (On Premise) report.
3. From the **People** field drop-down list, select **All Home**.
4. From the **Time Period** drop-down list, select **Specific Date** and then specify **today’s date**.
5. Click **Run Report** and then click **Refresh Status**.
6. When the status is **Complete**, click **View Report**. (Note that the report opens in a second window.)
7. After viewing the report, close the report window by clicking the **X** in the tab.
8. To close the **Reports** temporary workspace, click the **X** on the tab.

**Guide me: Generating the Employee Transactions and Totals report**

For auditing and validation purposes, you want to review all pay code data and totals that have been tracked for employees in Cost Center 401 for the previous pay period. Generate an Employee Transactions and Totals report to review this information.

1. From the **Related Items** pane, click **Reports**.
2. On the Select Report tab, expand the All category and then select the Employee Transactions and Totals report.
3. From the People drop-down list, select Cost Center 401.
4. From the Time Period drop-down list, select Previous Pay Period.
5. In the Actual/Adjusted field, confirm that Show hours credited to this period only is selected.
6. For the Pay Codes, confirm that all the available pay codes appear in the Selected list.
7. Click Run Report and then click Refresh Status.
8. When the status is Complete, click View Report. Note that the report opens in a separate window.
9. After viewing the report, close the report window by clicking the X on the report tab.
10. Do not close the Reports temporary workspace. We will use it again in the next exercise.
Scheduling Staff for Specific Periods
Assigning base schedules

Guide Me: Assigning a schedule pattern using a Pattern Template

An employee does not have an assigned schedule pattern. You want to permanently schedule the employee to work 3:00 P.M. to 11:30 P.M. Monday through Friday every week starting Sunday of the current schedule period.

1. In the Related Items pane, click the Schedules.
2. Using the Context Selector, confirm that All Home and Current Schedule Period are displayed. Make adjustments as needed.
3. Right-click on Ross Pieciul.
4. From the menu options, select Schedule Pattern.
5. In the Start Date field, enter Sunday’s date for the current schedule period.
6. Select the Forever option.
7. In the Define Pattern for field, enter 1 and verify that Weeks is selected.
8. Ross is not currently assigned to any patterns, so verify that the Override Other Patterns check box is clear.
9. Select the Pattern Template drop-down list and select 3 to 1130 M-F.
10. Verify that the day cells contain the correct shifts and click Apply.
11. Review the data in the Schedule Pattern dialog box, and when ready, click OK.
12. Click Save.
13. Click Refresh if necessary.

Guide Me: Modifying an assigned schedule pattern

An employee requested a change in his hours. He wants to work 3:00 P.M. to 11:30 P.M. on Monday, Tuesday, Wednesday, and Friday, and from 4:00 P.M. to 12:00 A.M. on every Thursday, with no end date, to accommodate acupuncture visits. He wants this change effective Sunday of the current schedule period. You approved this schedule change and need to modify his assigned schedule pattern.

1. Right-click on Ross Pieciul.
2. Click Schedule Pattern.
3. Click the Edit icon.
4. In the Start Date cell verify Sunday’s date for the current schedule period is selected.
5. Verify that Forever is selected.
6. Click the Thursday cell. Enter 4p-12a and then click Apply.
7. Click OK.
Scheduling staff to meet workload requirements

Modifying shift assignments

Guide Me: Scheduling shift assignments

A float employee does not have a regular schedule assigned to her. You usually create her schedule each schedule period. After assessing your workload needs for the next schedule period, you want to schedule the float employee to work from 7:00 A.M. to 3:30 P.M. on Monday and Tuesday of the next schedule period, and from 3:00 P.M. to 11:30 P.M. on Wednesday. You will use three different methods to schedule those shifts.

A. Adding a shift assignment by Typing directly in a cell
1. Access the Schedule Planner. Using the Context Selector, verify that All Home and Next Schedule Period are displayed. Make adjustments as needed.
2. While viewing by employee, click Monday’s cell for Ginger Baker.
3. Enter 7-330p and then press Tab.

B. Adding a shift assignment by using the copy and paste function
Use the copy and paste functions to copy the employee’s Monday shift information into Tuesday’s cell.
1. From the menu options, click Quick Actions > Copy/Paste.
2. Find and click Monday’s cell for Ginger Baker to copy the newly entered shift.
3. Click Tuesday’s cell for Ginger Baker to paste the shift.
4. From the Quick Actions menu, select Copy/Paste to turn the copy/paste function off.
5. Click Save.

C. Adding a shift assignment by using Insert Shift
You want to schedule the float employee for the 3:00 P.M. to 11:30 P.M. shift on Wednesday. You have a shift template for this shift and will use the Insert Shift feature to schedule the employee’s hours on Wednesday.
1. Right-click Wednesday’s cell for Ginger Baker.
2. From the menu, select Insert Shift template.
3. Verify that Ginger Baker’s name appears in the window.
5. Click Save.
6. Click Refresh if necessary.
Guide me: Adding a shift assignment

On Monday of the next schedule period, you need an employee to work from 9:00 A.M. to 5 P.M.

Use the Shift Editor to add this shift to the employee’s schedule for Monday of the next schedule period.

1. In the Schedule Planner, using the Context Selector, verify that All Home and Next Schedule Period are selected. Make adjustments as needed.
2. Right-click Monday’s cell for Jean Johnson.
4. Right click Monday’s cell for Jean Johnson again and select Add Shift.
5. Verify that Jean Johnson’s name appears in the Assigned To field and that Monday’s date of the next schedule period appears in the Start Date cell.
6. Make sure that Regular appears in the Type field.
7. In the Start Time field, enter 9a and then press Tab.
8. In the End Time field, enter 5p and then press Tab.
9. Verify the Duration column displays 8, which displays the total hours for the shift.
10. In the Shift Label field, enter RD for Regular Day Shift and then click Apply.
11. Click Save.
12. Click Refresh if necessary.

Scheduling non-worked hours and amounts

Guide Me: Scheduling planned personal time for two consecutive days

An employee mentioned she will be unable to work Monday and Tuesday of the next schedule period because she needs to take her father for medical tests.

- The employee has requested eight hours of Personal time each day for Monday and Tuesday of the next schedule period and you have approved this time.
- Schedule the employee for two consecutive eight-hour days of Personal time for Monday and Tuesday of the next schedule period using the Number of Days option.
- Make sure that she does not get paid for her scheduled work hours of 3:00 P.M. to 11:30 P.M. on those days, and include the Approved comment with this edit.

1. In the Schedule Planner, right-click Monday’s cell for Pat George.
2. From the menu options, select Add Pay Code.
3. Verify that Monday’s date for the next schedule period appears as the effective date.
4. From the Pay Code drop-down list, select Personal.
5. In the Amount field, enter 8.
6. Make sure that 3:00PM appears in the Start Time field.
7. In the Repeat for days field, enter 2.
8. Click Add Comment and select Approved.
9. Verify that the Override Shift check box and the Whole Shift options are selected.
10. Click Apply.
11. Click Save.
12. Click Refresh if necessary.

Guide Me: Scheduling planned vacation time for two consecutive partial days

For the next schedule period, Bob Brooks has requested the following changes:

- Four hours of vacation time on Wednesday
- Four hours of vacation time on Thursday

Perform the necessary scheduling edits, verifying that Bob does not get paid for any worked hours scheduled during his requested non-worked hours. Include comments as appropriate.

1. Using the Context Selector, verify that All Home and Next Schedule Period are displayed. Make adjustments as needed.
2. Right-click Wednesday’s cell for Bob Brooks and select Add Pay Code.
3. Confirm that Wednesday’s date for the next schedule period appears as the effective date.
4. From the Pay Code drop-down list, select Vacation.
5. In the Amount field, enter 4.
6. Confirm that 9:00AM appears in the Start Time field.
7. In the Repeat for (D) field, enter 2.
8. Confirm that the Override Shift check box and the Partial Shift option are selected.
9. Click Add Comment.
10. From the drop-down list, select Approved.
11. Click Apply and then click Save.
12. Close the Schedule Planner workspace when finished.
Monitoring Timecards to Facilitate Payroll Processing
Reviewing notifications of time data

Guide Me: Reviewing Exceptions in the Exceptions widget

You access Workforce Timekeeper to monitor time data frequently to identify any issues that require your immediate attention.

1. Click the exclamation Exceptions alert icon and then click View All.
2. From the list of employees with exceptions, click Julie Adams.
3. Hover your mouse over the Monday date (in red). What happens?
4. Double-click the In field for Monday, enter 9a, and then press Tab. What happens?
5. Click Show Schedule.
6. Click Cancel and click Yes.
7. Click the Summary left-facing arrow.
8. Sort the Signoff column in descending order (click two times on the column header).
9. Hover the mouse over the Signoff column, and then click Details.
10. After reviewing the details for multiple employees with exceptions, click the Summary left-facing arrow.

Resolving exceptions in the Exceptions widget

Guide me: Adding a Missed Punch

An employee had to leave early one day during the last pay period and forgot to punch out. She informed you that she left work at 6:00 A.M. In the Exceptions widget, modify her Out punch.

1. From the Exceptions widget, confirm that Previous Pay Period appears in the Time Period field.
2. Sort the Name column heading in ascending order. Select Jill Carpenter and click View Details(1).
3. In Jill’s Details view, click the missing Out punch for Wednesday and then click Add Punch.
4. In the Date field, select or enter Thursday's date.
5. From the Insert drop-down list, select Out Punch.
6. In the Out field, enter 6a and click Add.
7. Click Save.
8. Review the punch data. Why did this edit generate an exception? What type of exception was generated?

**Guide Me: Marking an exception as reviewed**

You recently modified time data for an employee who left early one day during the previous pay period. You also added a comment to the exception. Now, use the *Mark as Reviewed* feature to document that you have already addressed the exception.

1. In Jill’s Details view, click the **6am Out** punch.
2. Click **Mark as Reviewed**.
3. Click **Save**.
4. Validate the results.
5. When finished, click the **Summary** left-facing arrow.
6. Click **Refresh** to update the data.

**Guide me: Removing an employee’s punch**

An employee could not remember if he punched in at the start of his shift Tuesday of the previous pay period. He punched a second time to ensure that he recorded his start of shift time.

While reviewing the employee’s time data, you notice that two in-punches appear for the employee’s start of shift on Tuesday. You want to delete the employee’s second in-punch of 7:01 A.M.

Display the employee’s timecard for the previous pay period and delete the 7:01 A.M. punch for Tuesday.

1. In the **Summary**, select **Jack C. Smith** and click **View Details (1)**.
2. Click Tuesday’s cell that contains the **7:01 A.M.** punch and then click **Comment**.
3. From the **Comments** list, select **Double Punch** and click **OK**.
4. Click **Save**.
5. Click in Tuesday’s **7:01 A.M.** cell and then click **Remove**.
6. Click **Save** and review the results.
7. To see how the issue was resolved in the employee’s timecard, click **View Timecard**. You can also view the resolution by selecting **GoTo > Audits**.
8. Close the additional workspaces when finished.
9. In the Exceptions workspace, click the **Summary** left-facing arrow to return to the list of employees.
Guide Me: Adding sick time to an employee’s time data

An employee called in sick on Monday of the current pay period. Add a pay code amount for eight hours of sick time for the employee.

1. Access Raymond Aguirre’s time exceptions data for the current pay period.
2. Click Show Schedule and make note of the employee’s scheduled start time. (9am)
3. Hover your mouse over the Pay Code field for Monday.
4. Click the + icon.
5. In the Pay Code Amount dialog box, select Sick from the Pay Code drop-down list.
6. From the Amount drop-down list, select full sched day.
7. The Start Time field defaults automatically. Validate that the value is correct (9:00 A.M).
8. Click OK and then click Save.
9. Review the results. Notice that the timecard data for Monday is purple which means it was entered by the application.
10. Click the Summary left-facing arrow to return to the list of employees.

Guide Me: Adding personal time to an employee’s time data

An employee was involved in a car accident and was unable to work on Monday of the previous pay period. Enter Personal time for the employee.

1. From the Summary view of the exceptions widget, select Previous Pay Period.
2. Select Bob Brooks and then click View Details (1).
3. Click Show Schedule and make note of the employee’s scheduled start time (9:00 A.M).
4. Hover your mouse over the Pay Code field for Monday.
5. Click the + icon.
6. In the Pay Code Edit dialog box, select Personal from the Pay Code drop-down list.
7. From the Amount drop-down list, select full sched day.
8. The Start Time field defaults automatically. Validate that it contains the correct value (9:00 A.M).
9. Click OK and then click Save.
10. Review the results. Notice that the timecard data for Monday is purple which means it was entered by the application.
11. Click the Summary left-facing arrow and close the Exceptions and the Alerts and Notifications Widget workspaces.
Analyzing and resolving exceptions in hourly timecards

Resolving time data discrepancies in the hourly timecard view

Guide Me: Transferring hours to another cost center

On Tuesday of the previous pay period, an employee worked in her primary labor account from 7:00 A.M. to 11:00 A.M. She then worked in Cost Center 402 from 11:00 A.M. to 3:30 P.M. As the Payroll Manager, access the employee’s timecard for the previous pay period. Transfer her worked hours for Tuesday from 11:00 A.M. to the end of her shift to Cost Center 402.

1. Access the Reconcile Timecard Genie.
2. Using the Context Selector, from the Time Period drop-down list, select Previous Pay Period.
3. Click Kim Tesch and access GoTo control > Timecards.
4. Click the Transfer cell for Tuesday (after the 3:30 P.M. Out punch) and select Search.
5. In the Labor Account section of the Transfer dialog box, locate the Cost Center labor level option.
6. From the Cost Center drop-down list, select 402,402,222222 and then click Apply.
7. Click Save.
8. Review the results in the Totals tab.
9. When finished, close the Timecards workspace.
Reviewing and Submitting Timecards
Approving timecard data

There are no exercises for this lesson.

Approving employee timecards

Approving employee timecards

Guide Me: Reviewing notification of missing employee approvals

You are ready to start the time data approval process. Access the Inbox > Messages tab to see if you have any notifications informing you of employees who have not approved their timecards.

1. From the Related Items pane, select the Inbox.
2. Click the Messages tab.
3. Review any messages.
4. If necessary, contact the employee or the employee’s manager to follow up.
5. When finished, close the Inbox temporary workspace.

Guide Me: Finalizing and approving employee time data using the Timecard Approval Wizard

Before time data can be sent to payroll for processing, you need to make sure that there are no end-of-pay-period time data discrepancies that might prevent payroll from running, for example, missed punches.

1. Access the Timecard Approval wizard.
2. In the Select Pay Period For Approvals page, make sure that the HyperFind displays All Home.
3. Make sure that the Time Period field displays Previous Pay Period.
4. If you made any changes, click Save.
5. Click Next.
6. Click the Missed Punch column header to sort the data in the column in descending order.
7. If necessary, update the time data to remove any missed punch exceptions.
8. Click Next.
9. From the drop-down list, select Approve Timecards.
10. Sort the Employee Approval Column and verify that there is a check mark for every employee. (For this exercise, assume that employees have approved their timecards.)
11. Click Select All Rows.
12. Select Approval > Approve Timecard.
13. Click Yes to confirm the approval.
14. Click Next.
15. On the Group Edit Results page, view the contents of the Results column.
16. If there is a failure, click on the link for details.
18. Click Clear and then click OK.