Supervisor Manual

Managing Timecards and Schedules

Document Revision	Product Version	Release Date
A	Managing Timecards and Schedules v8.1	January 2021
B	Managing Timecards and Schedules v8.1	August 2021

Reference Guide can be found on the following website below.

http://www.houstontx.gov/ara/payroll.html

Getting Started

Importance and Benefits of UKG (Kronos)

Purpose

It is important that your employees are compensated accurately. To make this happen, you need to manage employees worked and non-worked hours, as well as attendance issues, in an efficient and timely manner. The application supports your ability to perform these tasks so that the data sent to payroll is accurate.

The following are the benefits that UKG provides to the City of Houston:

- Automates and simplifies your timekeeping and scheduling tasks
- Saves both time and money
- Assists with scheduling standardization and policy enforcement
- Improves time and attendance tracking
- Enables better end-to-end timekeeping
- Automates the time-off request process

Payroll Process

The application automates the payroll process, ensuring that the payroll is processed accurately and on time.

1. SAP sends employee data to Kronos
2. Employee time is collected using Time Stamp, TeleTime, Mobile, or Clocks.
3. All Managers/Supervisors review and edit time daily.
4. Supervisors apply approval at the end of the pay period.
5. Payroll applies sign off.
6. Kronos sends all in and out punches for non-exempt employees to SAP.
7. Kronos sends all pay codes to SAP to deduct or replace hours with an accrual.

Roles and Responsibilities

Purpose

Each employee and timekeeper/supervisor have responsibilities that are important in the payroll process. Each person's role determines his or her responsibilities and the tasks that he or she performs in the application.

Common Employee Tasks

Daily - employees perform the following tasks:

- Clock in and out according to their scheduled shifts from an approved device per department/management.
- Approve their timecard (optional), which allows the employee to review their time before supervisor/manager approval.
- Submit requests for time off

Common Timekeeper/Supervisor Tasks

Daily - timekeepers/supervisors perform the following tasks:

- Review employees' time using a Genie
- Manage timecard edits and schedules

Pay period end - timekeepers/supervisors perform the following tasks:

- Perform final review and approve timecards **(MANDATORY)**

Common Payroll Department Tasks

Pay period or as needed - Payroll will perform the following tasks:

- Perform a final review of employee timecards
- Sign off timecards
- Extract time data from the application to send to the payroll system
- Perform historical edits

Note: If you are not able to view your Direct Reports in Kronos, contact your Departmental HR Representative. The Departmental HR Representative will need to perform a *position to position* transfer to have your employees report directly to the approved Manager/Supervisor.

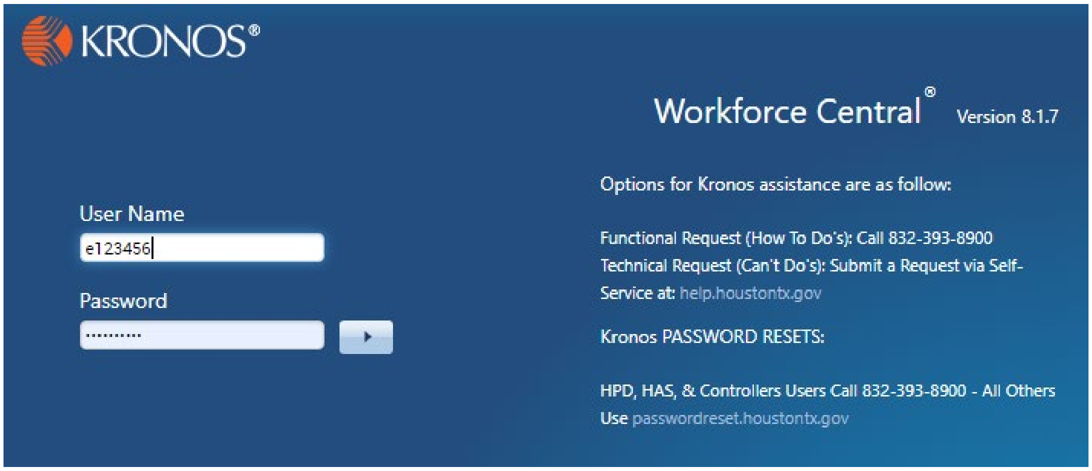
Logging On

Purpose

The UKG **log on** page provides access to all the features for performing your time and attendance tasks.

Example

You, as the timekeeper/supervisor, log on to the UKG application at least once a day to review and work with your employees' timecards and scheduling data.



Steps	
1	Type your **Username** and **Password** in their designated fields.
2	Click **Log On** button or press **Enter** key on the keyboard.

Note (only for HAS and HPD)

Users will log on using their City of Houston network user name and password will be "password". You will reset @ initial logon.

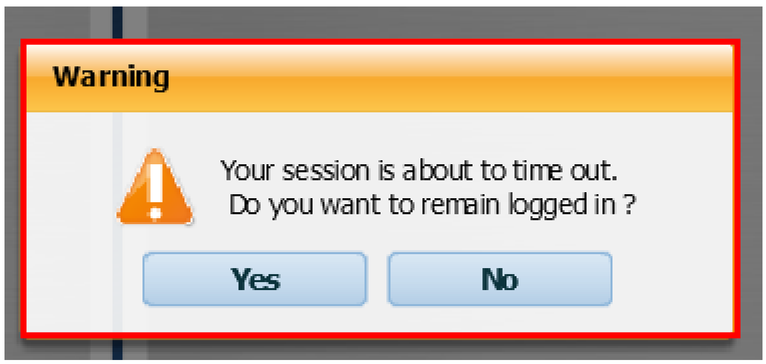
Logging Off of UKG

Purpose

The application provides security to prevent other people from accessing your information and helps keep your employees' information confidential.

Regaining access after the inactivity timeout

Inactivity timeout protects sensitive information in the application. If the application does not detect activity within a specific amount of time, it automatically logs you off. To regain access to the application, you must re-enter your password in the inactivity timeout screen. When you regain access, the application restores the last page you were viewing.



Upon completion of your tasks, you must **Sign Out of** the application to ensure that your employees' information is kept confidential.

Note

Users will log on using their City of Houston network user name and password.

The inactivity timeout screen appears if there is no activity in UKG for 30 minutes.

Caution

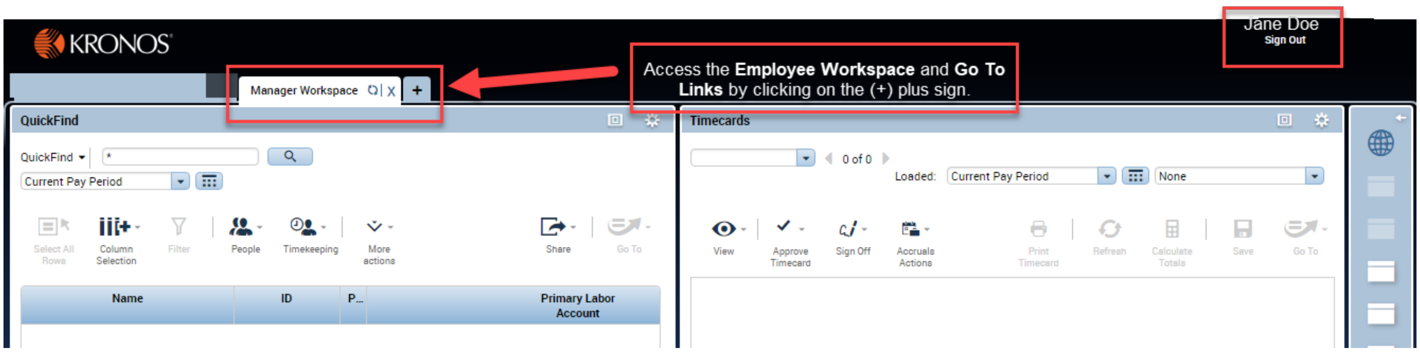
If you do not log in after an inactivity timeout, you will lose all unsaved edits.

Navigating UKG Page

<u>Purpose</u>

The page displayed will appear on the ***Manager's Workspace only***. You'll see your employees Punch Exceptions in your Primary Widget Area; Default Request Manager and COH All Quick Links in your Secondary Widget Area; All other Widgets will be located in your Related Items Pane.

A **Genie** is a pre-defined view that summarizes and organizes information according to common tasks you perform on a regular basis. The name of the Genie reflects a common task, such as Reconcile Timecard.



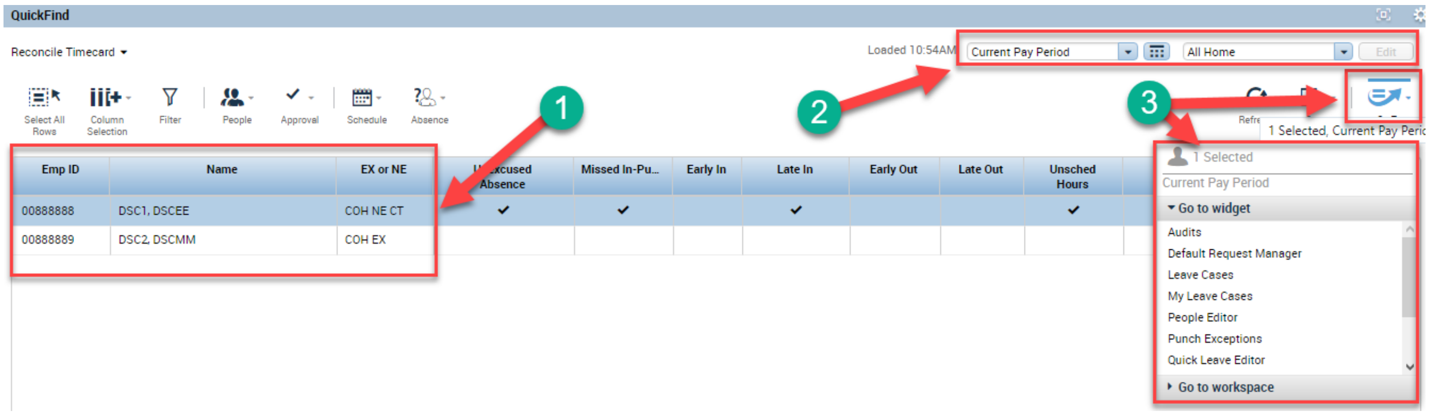
Using the tools within the workspace

QuickFind is located at the top left side of the workspace and allow you to access information specific to one or more employees.

The **Show** field allows you to display a group of employees. The default setting for the **Show** field when you log on is **All Home**, which displays all employees that report to you. You can use the **Show** field to further refine your selection to include employees in a specific group, such as only those employees that are working in a particular area, or on a particular shift.

The **Time Period** field allows you to determine the timeframe you want to view, such as the **Current Pay Period**, or a particular timeframe in the past. The **time period** you select determines what you will see on that page.

The Menu Bar contains tasks that you can perform on the page. Each Menu Bar is specific to the page you are currently viewing.



Steps	
1	➢ In the workspace area, highlight the employees for whom you need to access data.
2	➢ Verify the **Time Period** you want to work in.
3	➢ Use the **Go To** menu to access the task you want to perform.

Tip

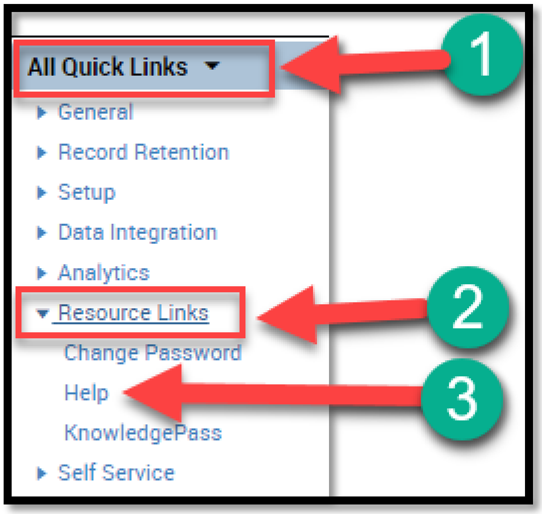
There are various ways to select multiple employees before using a quick link:

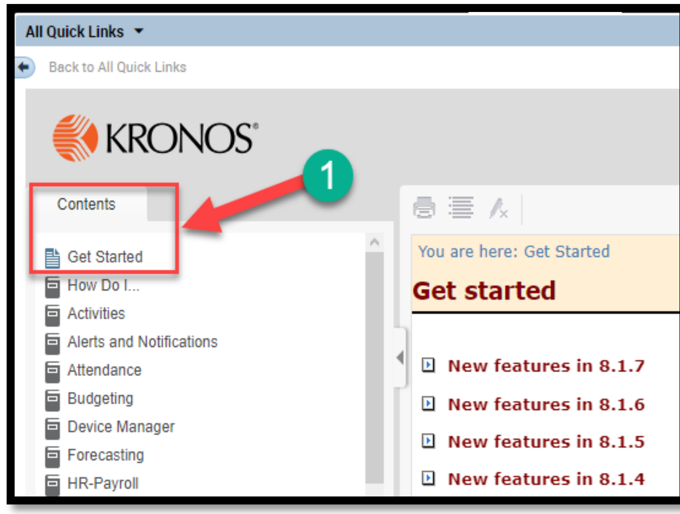
- To select multiple employees listed adjacent to each other
  - Click the first name, then hold down the **Shift** key and click the last name, or
  - Click one employee and drag the mouse up or down to select other employees
- To select multiple employees that are not listed adjacent to each other, click one name, then hold down the **Ctrl** key and click additional employee names

Using Online Help

Purpose

The application contains a context-sensitive online Help system to help you perform timekeeping tasks.





Steps	
1	In the **Related Items** pane, click **All Quick Links**.
2	Go to **Resource Links > Help**
3	This link displays a Help topic specific to where you are in the application.

Component	Description
Contents tab	Collection of topics.
Index tab	Alphabetical directory of all Help topics.
Search tab	Tool for entering a specific word or phrase; topics appear with percent rankings that identify their relevance.
View/Hide Helper Tabs	Displays or hides related topics and terms.
Show Full Screen/Show Headers	Hides or displays the banner within the Help topic page.
Topics List	Available topics to select. If you are on the Search tab, the rank number identifies the relevancy of the topic to the entered search data.

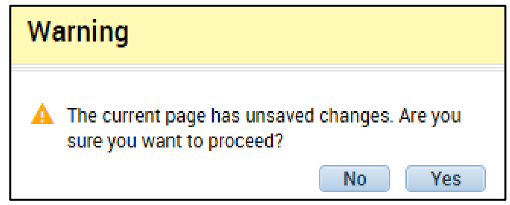
Refreshing and Saving Data

<u>Purpose</u>

When you add and modify schedule data, the application displays your edits but does not save them automatically. You must tell the application to **save** the data. Prior to saving your data, you can cancel your edits if necessary.

Visual indicators

When you **edit** a schedule, the **Save** icon turns orange to let you know that your data is not yet saved. After you save the data, the **Save** icon is greyed out.



Canceling edits

The application does not save your edits until you tell it to do so. Until that time, you can remove or cancel your edits using the **Refresh** icon. When you click the **Refresh** icon, the application will display a warning message making you aware of unsaved changes. If you continue without saving the edits, the application re-displays the most recently saved information, overwriting your unsaved edits.

Steps	
1	Perform your edits to a schedule. Note the visual indicator with the **Save** icon that indicates unsaved data.
2	Click **Refresh** and review the **Warning** pop-up window.
3	To cancel edits, click **Yes**. If you do not want to cancel and want to close the **Warning** window, click **No**.

Saving edits

When you are satisfied with your edits, you must ***save*** them. If you close the employee's schedule before you save the edits, they are not saved. The application will warn you of unsaved changes.

Steps	
1	Perform your edits to a schedule. Note the visual indicator with the **Save** icon that indicates unsaved data.
2	Click **Save**.
3	Review the employee's schedule to ensure that the **Save** icon is greyed out, validating that your information was saved.

Scheduling Employees

Schedules Overview

Purpose

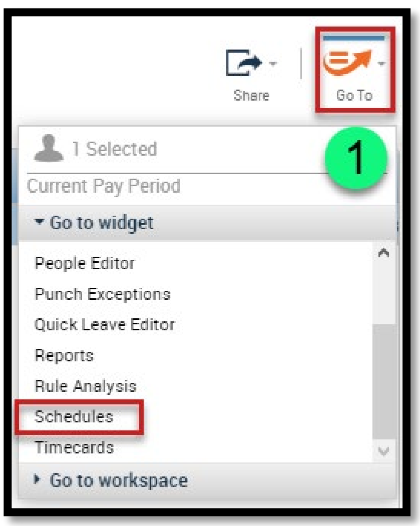
UKG includes the Schedule Editor where you schedule worked and non-worked hours. All employees must have a schedule in UKG. An **Exempt** employee timecard verifies time worked based on the schedule listed in UKG. A N**on-exempt** employee work schedule displays the start and stop time of a shift. (Helps display issues outside of their schedule for example missed punch, late/early in and late/early out on the Timecard.)

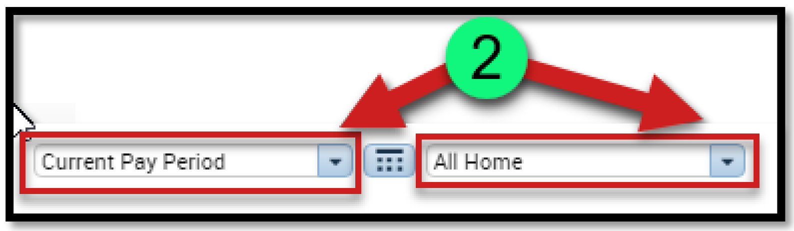
Using the **Schedule Editor**, you can:

- Add, edit, and delete shifts
- Add pay codes for worked or non-worked hours
- Schedule labor transfers

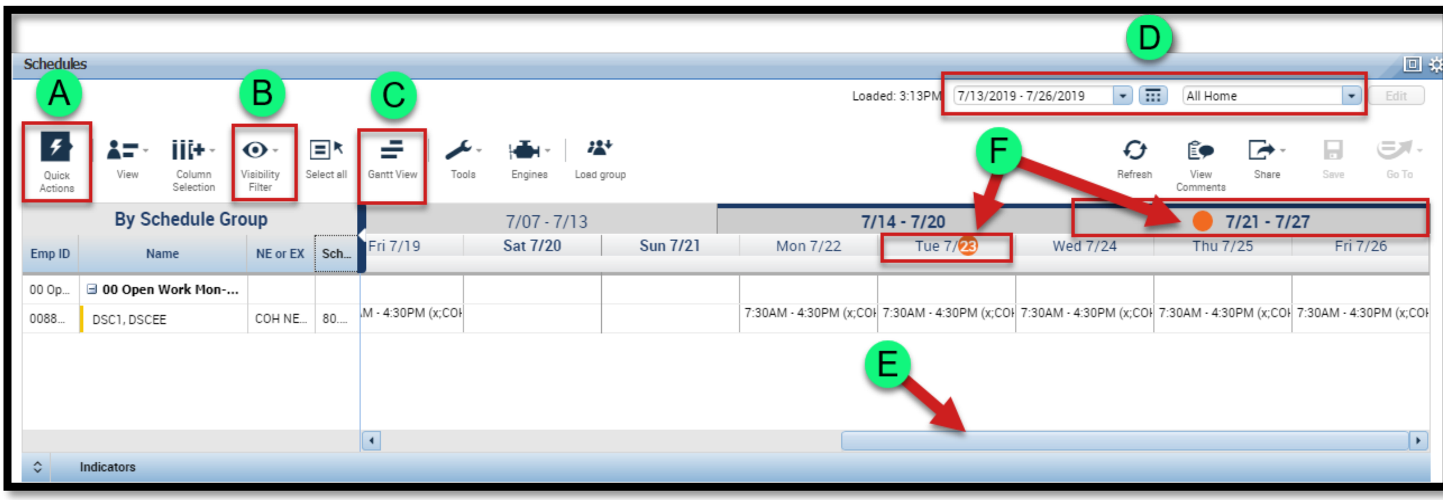
Navigating to the Schedules

After selecting the employee(s) you whose schedule want to edit, use the following steps to navigate to the **Schedules** widget:





Steps	
1	Click the **Go To** menu and select **Schedules**.
2	Select the **Time Period** and **Show** (e.g. **Current Schedule Period**, **All Home**).



Areas	Description
A. Quick Actions	Click to access icons that allow you to perform the most common scheduling tasks quickly and easily.
B. View/Visibility	Select how you want to view the schedule and which schedule elements you see.
C. Tabular/Gantt View	Toggle between tabular and graphical views of the schedule. Edits can be performed from either view.
D. Context	Set the time period and group of employees that you want to work with.
E. Indicators	Displays schedule totals.
F. Orange Circle	Indicates the current day and week.

Assigning Exempt Employees to a Schedule Group

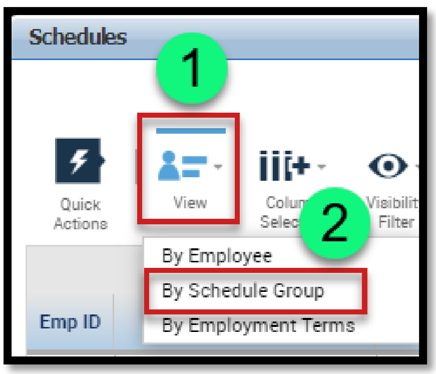
Purpose

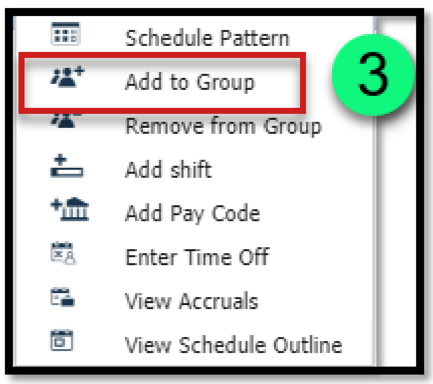
A schedule group is selected in UKG for "**Exempt employees"** to match their schedule group in SAP. The Schedule Group is selected based on the days worked in the pay period and the number of hours per day. A Schedule Group for an exempt employee must be effective from the first day of a pay period. Do not change the Schedule Group for an exempt employee effective in the midst of a pay period.

Note
The start and end times will be added via the Shift Template separately from the Schedule Group.

Example

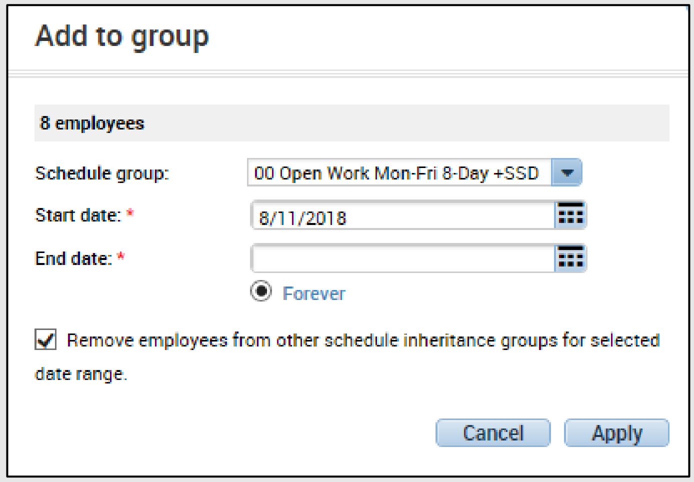
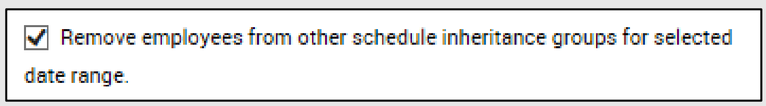
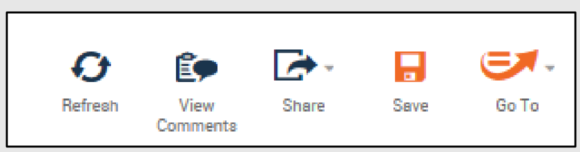
An exempt employee works 8 hours per day Monday thru Friday with Saturday and Sunday off. Add the employee to the "**00 Open Work Mon- Fri 8-Day +SSD**" Schedule Group.





Steps	
1	Click **View**.
2	Select **By Schedule Group**.
3	Select the employee and right-click on his name. Select **Add to Group**.

Note
You can add more than one employee to a group by selecting all the employees and right-clicking on one of the employee names. Select **Add to Group.** Any information entered in the **Add to Group** window will apply to all employees selected.

Steps		
4	From the **Schedule Group** drop-down list, select the name of the schedule group to which you want to assign the exempt employee(s). ***Only select a "00 Open" Schedule Group***.	
5	In the **Start Date** drop-down list, select the first day of the pay period for the effective date.	
6	In the **End Date** drop-down list, select the last date that the schedule group assignment is effective. For the assignment to be in effect with no end date, select **Forever**.	
7	Leave the box checked for *"Remove employees from other schedule inheritance groups for selected date range."*	
8	Click **Apply**.	
9	Click **Save**.	

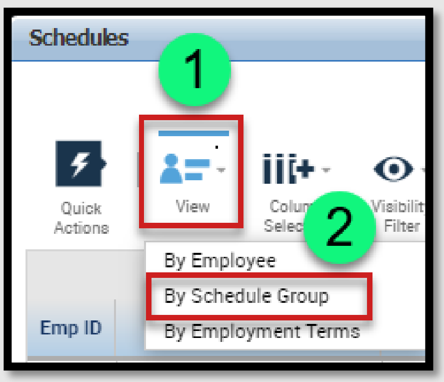
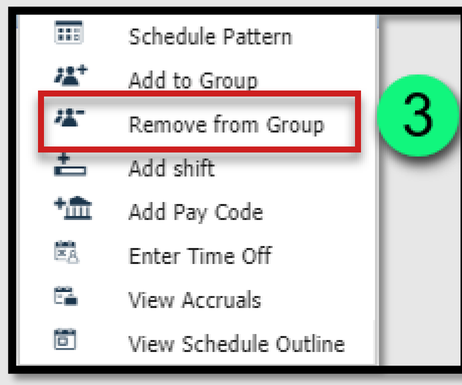
Removing Employees from a Schedule Group

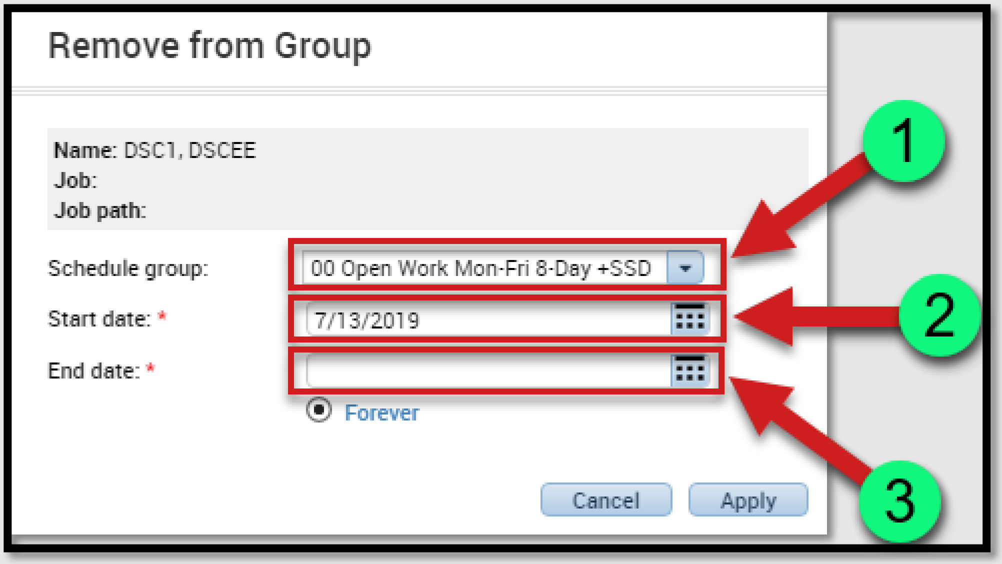
<u>Purpose</u>

Sometimes an employee is incorrectly assigned to a schedule group or needs to move from one schedule group to another. In either case, you would need to remove the employee from the schedule group.

Example

You assigned an employee to the **0700-1630 30 DAY EX Mon-Thu 9 Fri 4 +9SSF4D** schedule group in error. Remove the employee from the erroneous group.

Steps	
1	Click **View**.
2	Select **By Schedule Group**.
3	Select the employee and right-click on his name. Select **Remove from Group**.
	 
4	From the **Schedule Group** drop- down list, select the name of the schedule group from which you want to ***remove*** the employee from.
5	From the **Start Date** drop-down list, specify the effective date to remove the employee from the schedule group.
6	From the **End Date** drop-down list, specify the date the removal is no longer in effect. To remove the employee from the schedule group indefinitely, select **Forever**.



7	Click **Apply** and then click **Save**.
8	Click the **Refresh** icon.
9	Confirm that the employee(s) were removed from the schedule group.

Tip

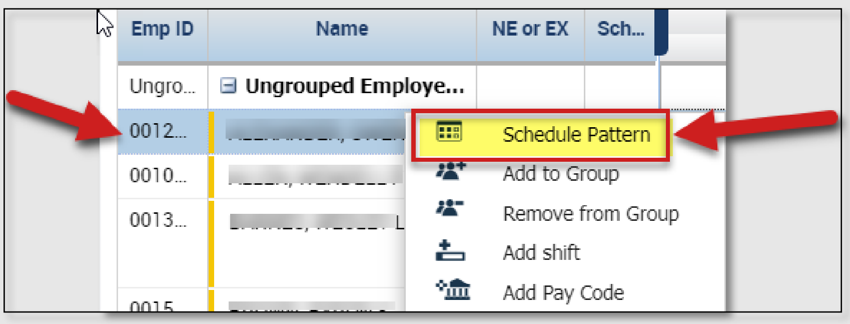
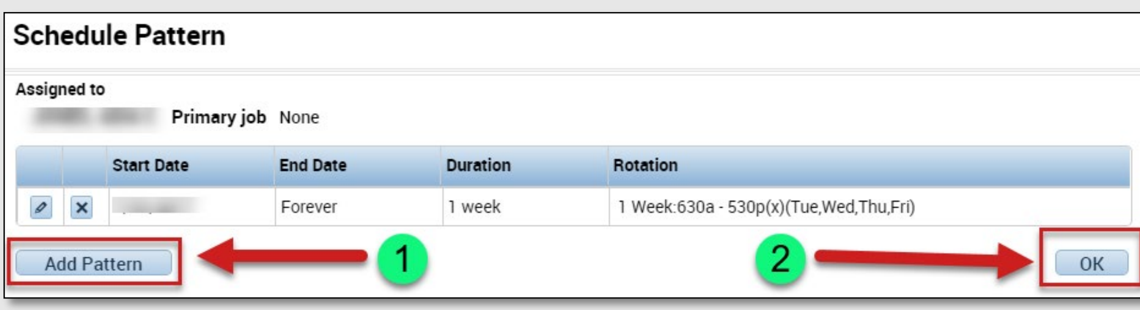
Removing an employee from a schedule group does not affect that employee's schedule assignment.

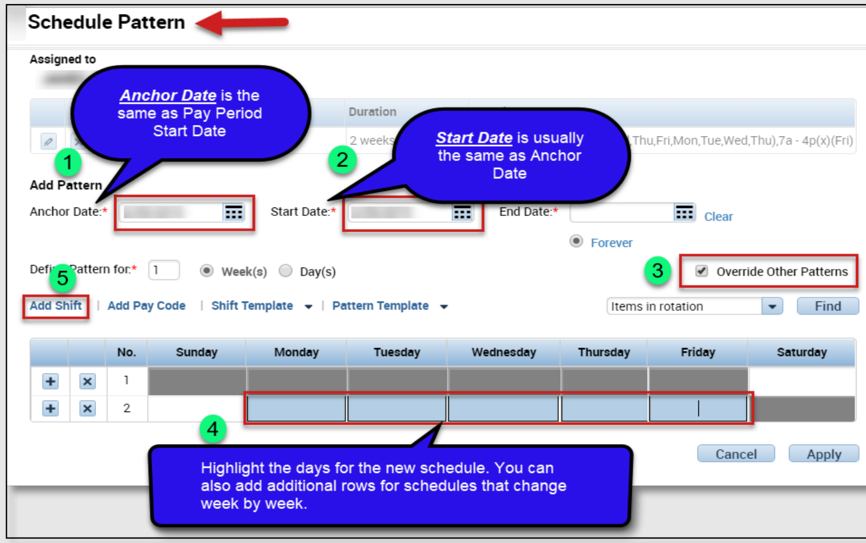
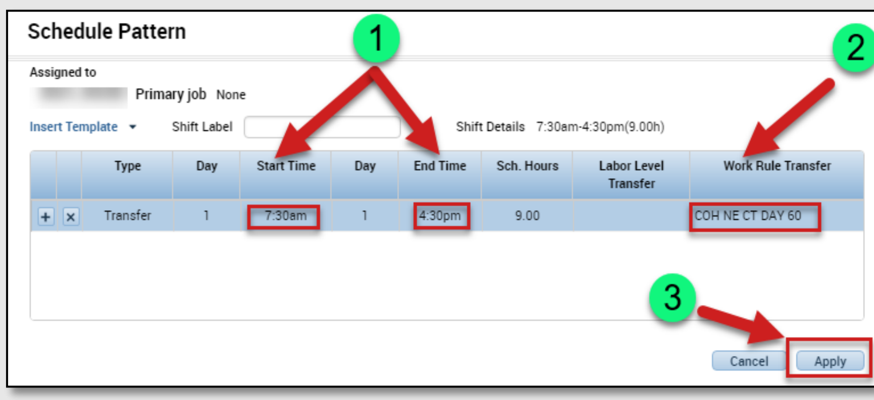
Creating a Schedule Pattern

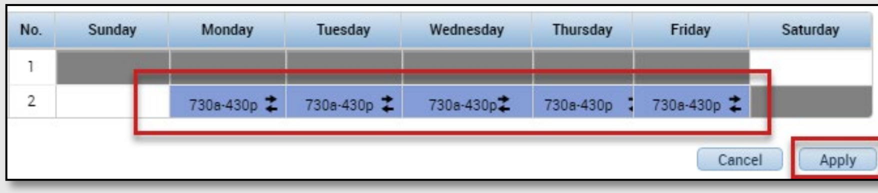
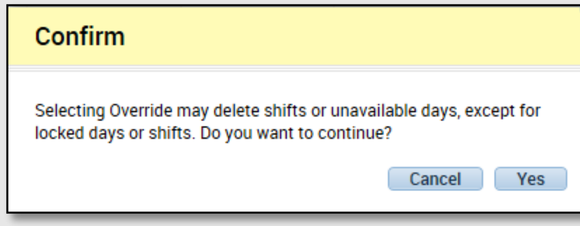
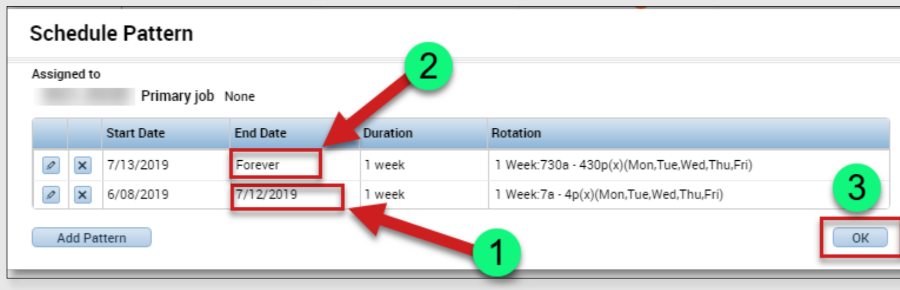
(Making a schedule change for an employee with a current or future date)

Purpose

Create a schedule pattern manually and apply it to one or more employees. You would need to create it manually again. ***DO NOT** edit the current schedule, always add a new one.*

Steps	
1	In the **Schedules** widget, select the specific time period from the **Time Period** drop-down list. The default is **Current Schedule Period**.
2	Select the employee(s) to change their schedule using a new pattern. To select multiple employees, hold the **Ctrl** key and click each employee's name.
3	Right-click the employee's name and select **Schedule Pattern**. 
4	Always select **Add Pattern**, then **OK** 

Steps		
5	Select the **Anchor Date** and the **Start Date** to establish the employee(s) starting dates they will be working the schedule pattern.	
6	By default, the **Forever** button will be selected. If it is a temporary schedule, select an **End Date**. The *temporary schedule* will expire on the date specified and the previous schedule will begin.	
7	To replace all other assigned schedule patterns with the new schedule pattern, select the **Override Other Patterns** checkbox. *Check this box if you are making a schedule change for an employee with a current of future date*.	
8	Click the cell of each day that applies to the schedule pattern. To select multiple days, hold the Ctrl key and single-click the appropriate cells.	
9	Click Add Shift, located on the left side. Type the **Start Time**, **End Time**, and select the correct **Work Rule Transfer.**	
10	Verify your shift times and work rule then Click Apply.	

11	Verify your new schedule, click **Apply.**	
12	Verify your pattern and Click **OK**.	
13	Click **Save**.	
14	Click **Refresh** twice until the pattern has been applied.	

Editing a Single Day Shift

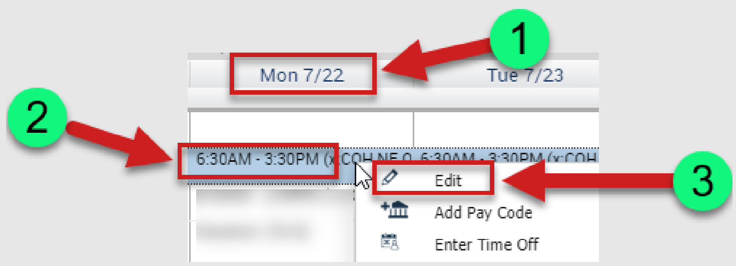
(Not Editing a Schedule Pattern)

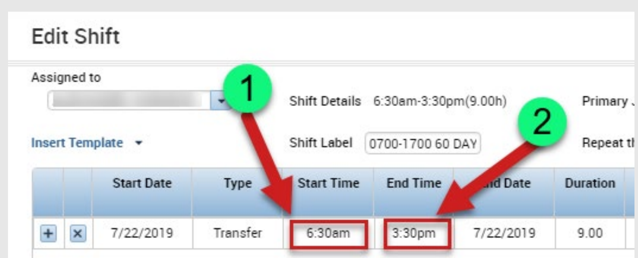
Purpose

When your workload needs vary, you may need to change employees' schedules in order to reduce the number of exceptions that might appear on an employee's timecard.

Example

You scheduled an employee to work eight hours on Saturday. You now only need the employee for four hours, so you edit the employee's shift for Saturday to reflect the new shift times. You will use the **Quick Actions** to delete the 8-hour shift and insert the 4-hour shift. This example will be completed in Gantt view.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the Schedules widget,
a) right click on the DAY in which you would like to change the START and/or END time.
b) Select EDIT</td><td>


</td></tr>
<tr><td>2</td><td>Edit Shift should appear. Next you will type in the time (Start/End)</td><td>


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<tr><td>3</td><td></td><td>


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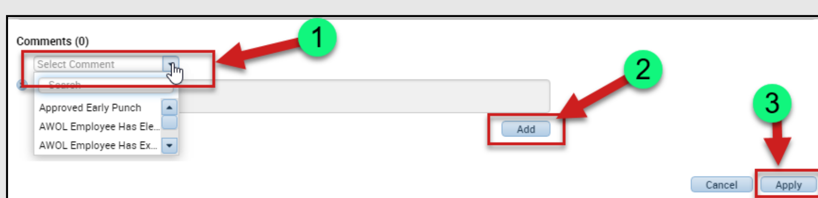
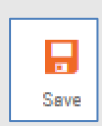
<tr><td>4</td><td></td><td>


</td></tr>
<tr><td>9</td><td>Click Save.</td><td>


</td></tr>
</table>

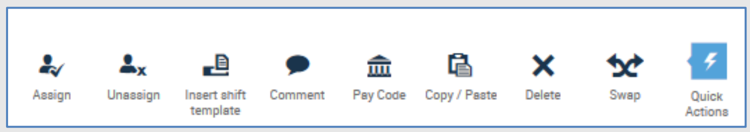
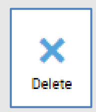
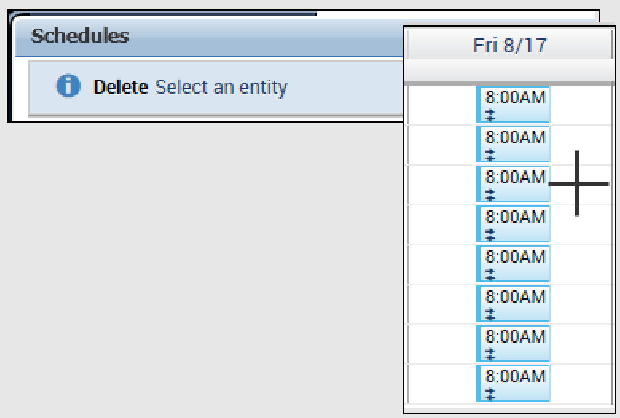
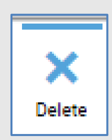
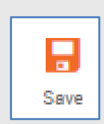
Deleting a Shift

Purpose

Because staffing needs can change, an employee that is scheduled to work a shift may no longer be needed. When this happens, you need to delete the shift from the employee's schedule to prevent the application from flagging the employee as absent without an excuse.

Example

An employee is currently scheduled to work on Friday and is no longer needed. You remove the shift from his schedule on Friday to avoid an unexcused absence. Use the **Quick Actions** to perform the delete. This example will use the ***Gantt view.***

Steps		
1	In the **Schedule** widget, click **Quick Actions** to open the menu.	
2	Click **Delete**. **This will turn on the function.**	
3	Find the shift you want to delete and click the cell to delete the shift. **Note:** *The cursor has changed to a crosshair and there are instructions at the top of the schedule window to help you with the steps.*	
4	Click **Delete** again to turn off the function. **Note:** *Remember to turn off the **Quick Action function** or it will still be functional and could cause unintended edits.*	
5	Click **Save**.	

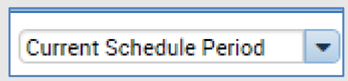
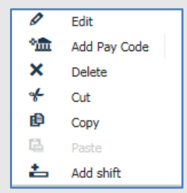
Scheduling a Transfer for a Full Shift - (*Grant Employees)*

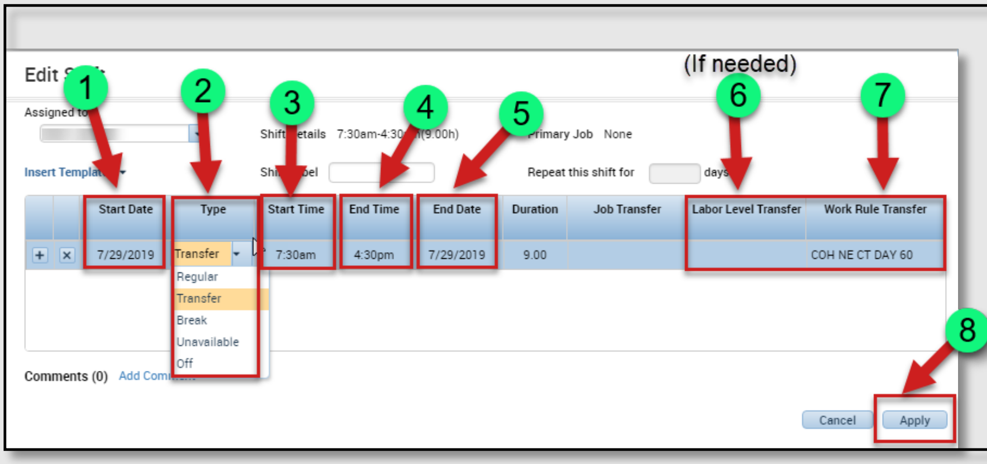
Purpose

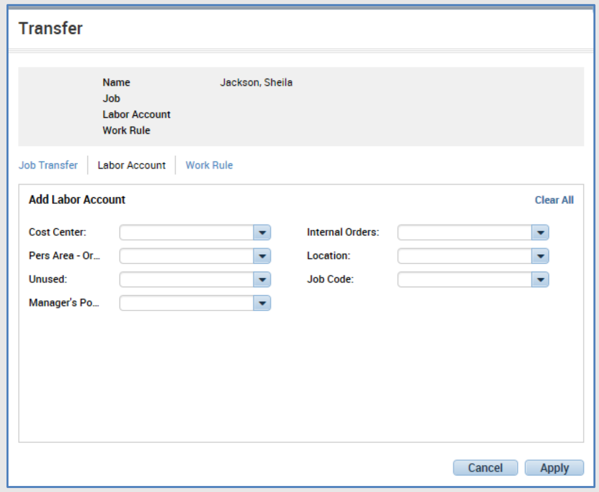
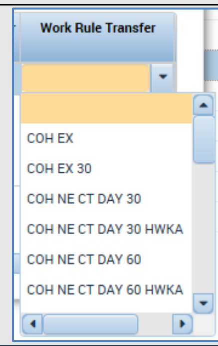
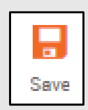
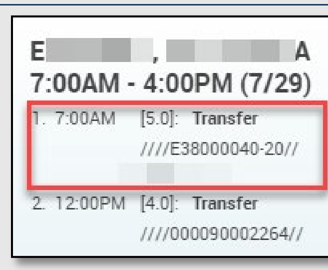
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged, and the right work rule is applied. You or the employee can record the transfer at a clock or directly in the schedule or timecard.

Example

On Wednesday of the next schedule period, you need an employee to work his entire **shift assigned to a specific grant.** Schedule the employee to work in the grant 8:00 A.M. to 5:00 P.M. on Wednesday of the next schedule period.

Steps		
1	In the **Schedules** widget, select the specific time period from the **Time Period** drop-down list.	
2	Locate the employee's row and right-click the cell in that row and under the date where you want to add a shift that requires a transfer. Click **Edit**.	
3	In the **Edit Shift** window, confirm that the correct date appears in the **Start Date** field.	
4	From the **Type** drop-down list, select the Transfer shift type.	
5	In the **Start Time** field, enter the time the shift starts and press **Tab**.	
6	In the **End Time** field, enter the time the shift ends and press **Tab**.	
7	Confirm that the date in the **End Date** field is correct. If the shift crosses a day divide, you need to change the shift's end date to the following day.	

8	(If needed) 1 2 3 4 5 6 7 8 Assigned to Insert Template Primary Job None Repeat this shift for days Start Date Type Start Time End Time End Date Duration Job Transfer Labor Level Transfer Work Rule Transfer 7/29/2019 Transfer 7:30am 4:30pm 7/29/2019 9.00 COH NE CT DAY 60 Regular Transfer Break Unavailable Off Comments (0) Cancel Apply

9a	To transfer hours to another labor account, click the drop-down list in the **Labor Level** column and select **Search**. Complete the fields in the **Transfer** window.	
9b	To transfer hours to another work rule, select the work rule drop-down list from the **Job Transfer, Labor Level Transfer** or **Work Rule** column.	
10	Click **Apply**.	
11	Click **Save**.	
12	**Note:** Hovering over the shift will display a pop-up window showing the transfer details.	

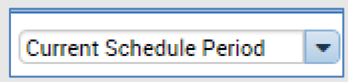
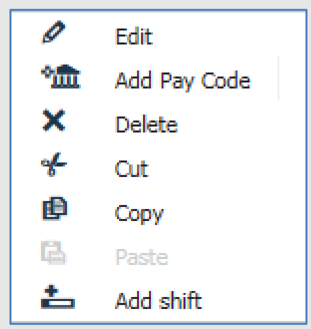
Adding Shifts with (Partial Day) Transfers

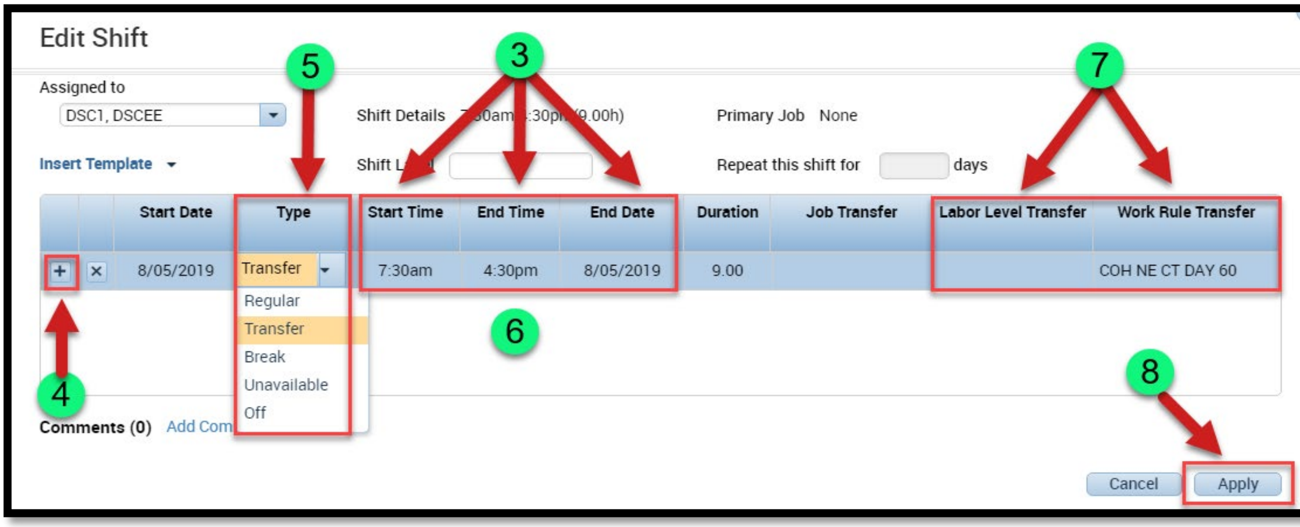
Purpose

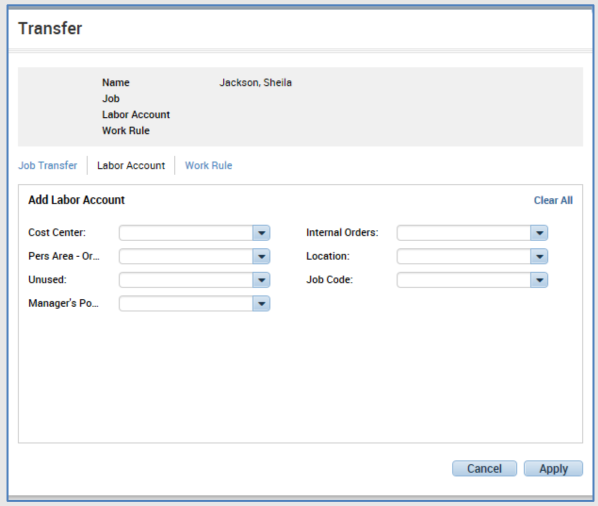
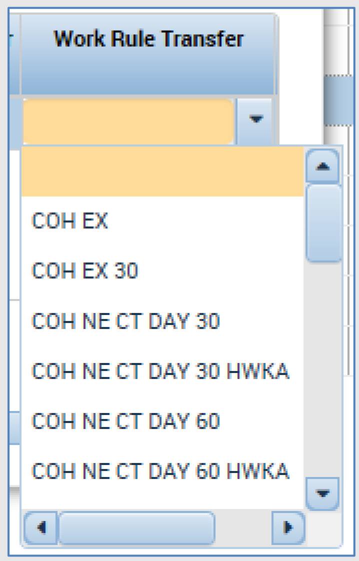
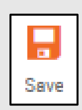
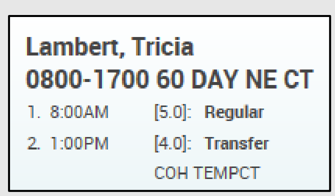
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer an employee to another labor account or work rule for part of his or her shift. You need to note the transfer in the application so that the right labor account is charged, and the right work rule is applied. You or the employee can note the transfer at a clock or directly in the schedule or timecard.

Example

Schedule an employee to work part of her shift, 1:00 P.M. to 5:00 P.M. in a specific grant on Monday.

Steps		
1	In the **Schedules** widget, select the specific time period from the **Time Period** drop-down list.	
2	Next, locate the employee's row and right-click the cell in that row. Add the date where you want to add a shift that requires a transfer. Click **Edit**.	
3	In the **Edit Shift** window, for the hours the employee is scheduled to work before the transfer, fill in the **Start Time** and the **End Time** fields.	
4	Click the plus icon (**+**) to add a new row.	
5	In the new row, in the **Type** drop-down list, select the **Transfer** shift type.	
6	In the **Start Time** field, confirm the time the shift transfer begins and press **Tab**. In the **End Time** field, enter the time the shift transfer ends and press **Tab**. Confirm that the date in the **End Date** field is correct. If the shift crosses the day divide, you need to change the shift's end date to the following day.	
7	Select the type of transfer you are performing: **Labor Level** or **Work Rule**.	
8	Select **Apply**	


Edit Shift
Assigned to
DSC1, DSCEE
Insert Template
Shift Details
Primary Job None
Repeat this shift for days
Start Date
Type
Start Time
End Time
End Date
Duration
Job Transfer
Labor Level Transfer
Work Rule Transfer
8/05/2019
Transfer
7:30am
4:30pm
8/05/2019
9.00
COH NE CT DAY 60
Regular
Transfer
Break
Unavailable
Off
Comments (0)
Cancel
Apply
3
4
5
6
7
8

<table>
<tr><td>9</td><td>To transfer hours to another labor account, click the drop-down list in the Labor Level column and select Search. Complete the fields in the Transfer window.</td><td>
</td></tr>
<tr><td>10</td><td>To transfer hours to another work rule, select the work rule drop-down list from the Work Rule column.</td><td>
</td></tr>
<tr><td>11</td><td>Click Apply.</td><td>
</td></tr>
<tr><td>12</td><td>Click Save.</td><td>
</td></tr>
<tr><td>13</td><td>Note: Hovering over the shift will display a pop-up window showing the partial transfer details.</td><td>
</td></tr>
</table>

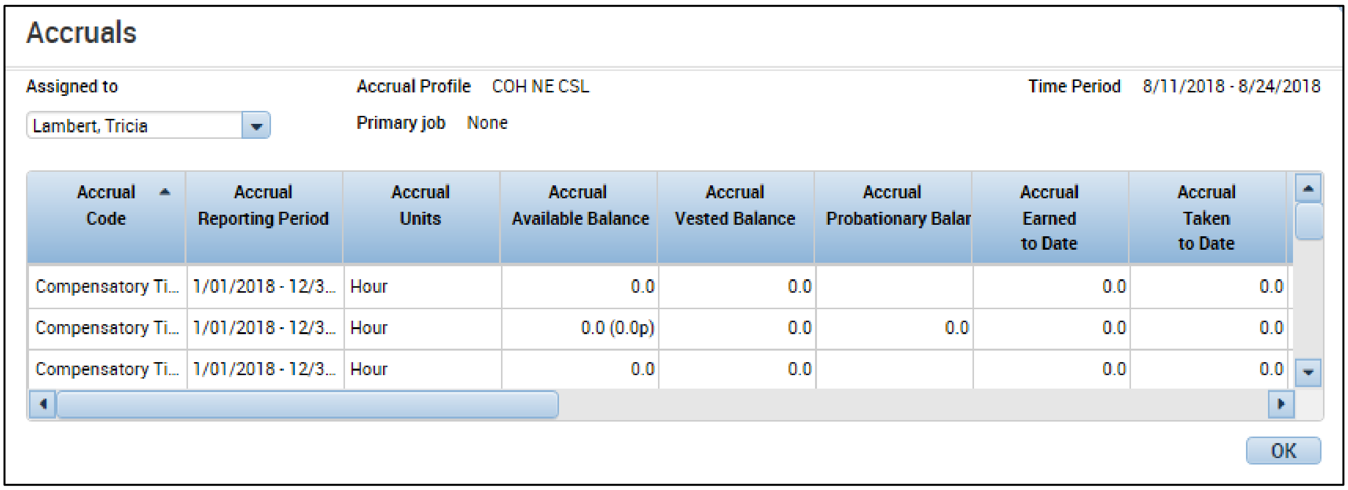
Adding a Paycode to the Schedule

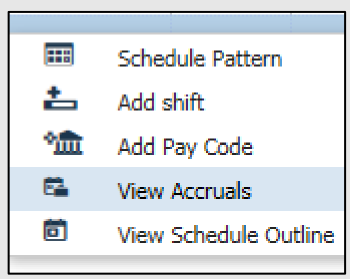
Purpose

Non-worked hours include sick time and vacation. You should schedule your employees' non-worked time when you know about it in advance.

Accrual balances

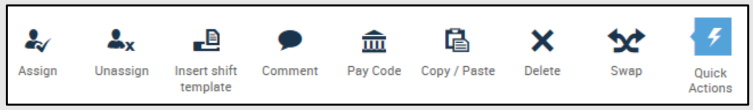
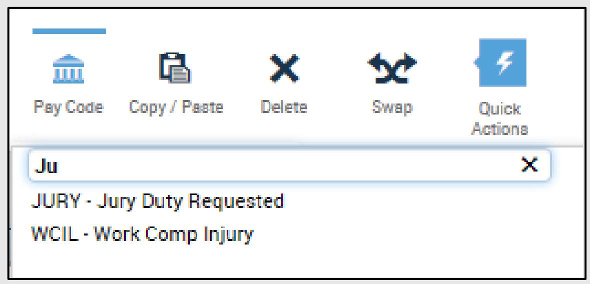
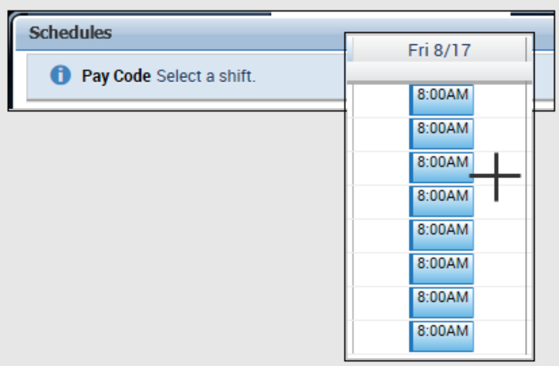
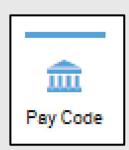
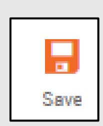
Before you schedule non-worked time, confirm that the employee has accrued enough hours. The Accruals option on the Schedule Editor View menu displays the Accruals Reporting Period data with the employee's current and projected accrued time. The balances are accurate as of the last date in the date range.



Steps		
1	In the **Schedules** widget, right-click the employee with whom you want to view accruals. Click **View Accruals**.	

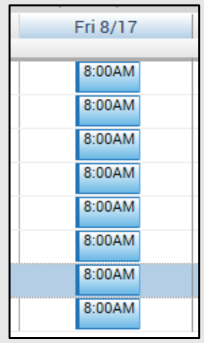
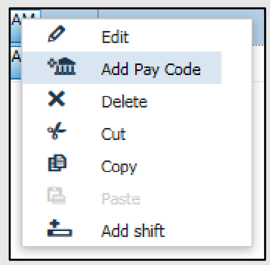
Example

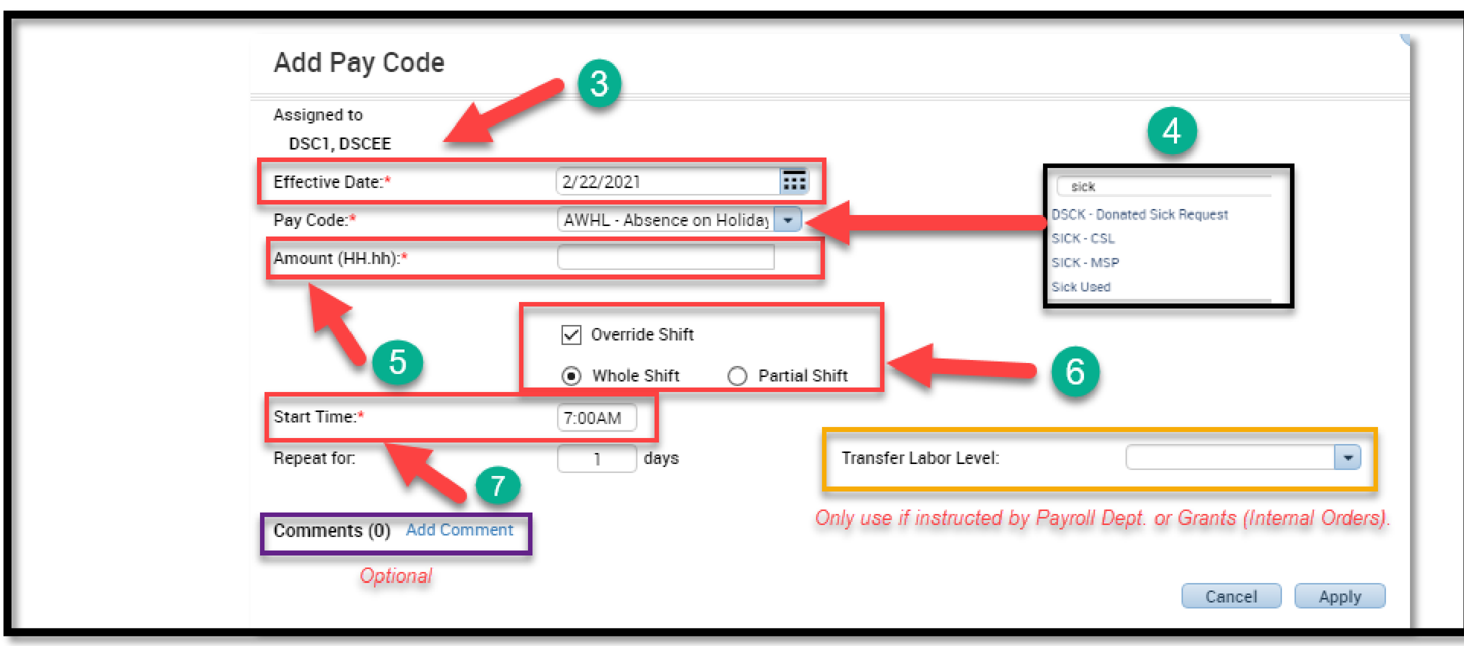
An employee is going to be out on Jury Duty on Monday of the next schedule period. You schedule eight hours of Jury Duty to avoid an unexcused absence. Use the **Quick Actions** and the **Gantt** view.

Steps		
1	In the **Schedules** widget, open the **Quick Actions** menu.	
2	Click **Pay Code** to turn on the function.	
3	Select the pay code you want to assign from the drop-down list. **Tip:** You can start entering the name of the pay code in the search field to quickly find what you're looking for.	
4	Find the shift where you want to add the pay code and click the cell. **Note:** *The cursor has changed to a crosshair and there are instructions at the top of the schedule window to help you with the steps.*	
5	Click **Pay Code** again to turn off the function. **Note:** *Remember to turn off the Quick Action function or it will still be functional and could cause unintended edits.*	
6	Click **Save**.	

Example

An employee is having a dental procedure Friday afternoon and needs to take half a day sick time. Schedule the employee for four hours of sick time for Friday to avoid an incorrect exception.

Steps		
1	In the **Schedules** widget, find the shift of the employee whose shift you want to a pay code.	
2	Right-click the shift and select **Add Pay Code**.	

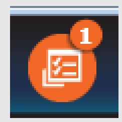
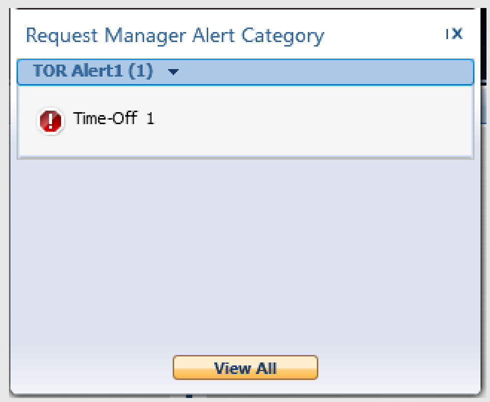
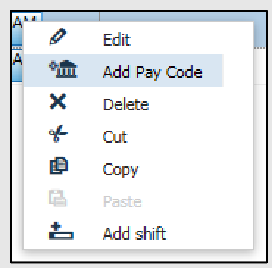


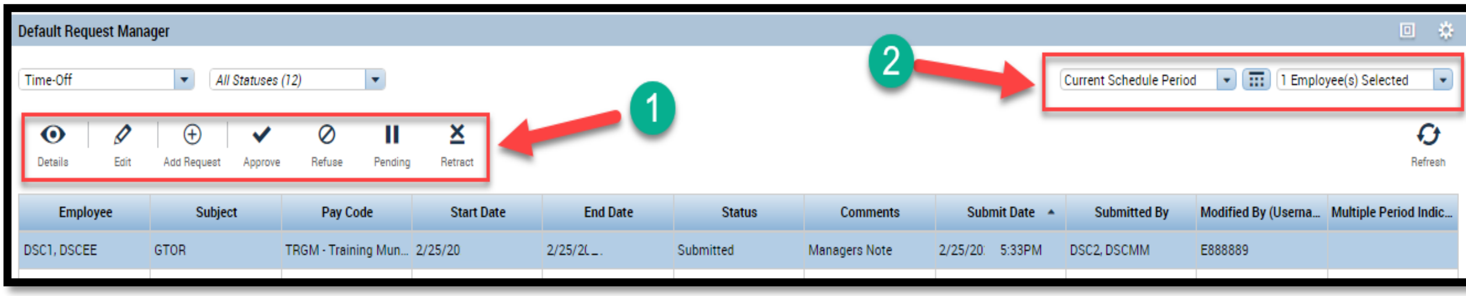
Steps	
3	In the **Effective Date** field, confirm that the correct date is selected.
4	From the **Pay Code** drop-down list, select the pay code.
5	In the **Amount** field, delete the default *Half sched day* and replace it with the amount of hours (HH:hh).
6	(Optional) If the non-worked hours replace an existing shift, select the **Override Shift** check box and do ***ONE*** of the following: 1. To override the entire shift, select **Whole Shift**. 2. To override part of the employee's scheduled shift, select **Partial Shift**. In the **Start Time** field, enter the effective time for the non-worked hours. If the employee already has a schedule, the shift start time is the default. In the **Repeat for (D)** field, enter the number of consecutive days. For Example, if the employee has requested five consecutive days of vacation, enter **5**.
7	Click **Apply** and then click **Save**.

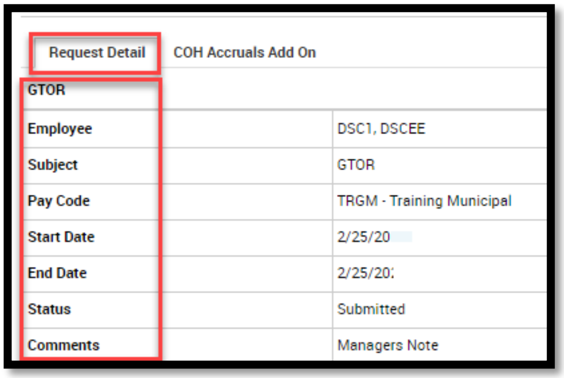
Approving Time-Off Requests – Default Request Manager

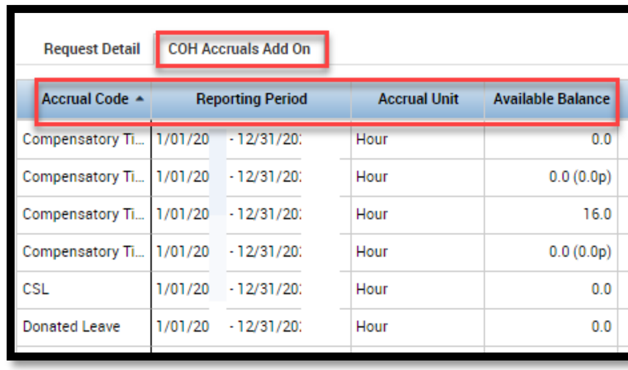
Purpose

Employees can submit time-off requests using the ***Request Time Off*** button located in the ***Employee Calendar*** widget. This feature provides a consistent, easily accessible way for employees to request or cancel time off, as well as a quick way for timekeepers/supervisors to evaluate and respond to them.

Steps		
1	Click the **Request Manager Alert** and select a request type to open the **Default Request Manager** widget. The number on the alert indicates the number of requests that are pending. The Requests list shows the number of requests for each type of request.	 
2	Right-click the shift and select **Add Pay Code**.	







Steps	
1	You can modify the requests in the grid. Above the columns: A. Select a time period, location, request type, and status *B. To view detailed information:* a. Double-click a request b. Select a request, and then click Details or view the information in the Details tab.
2	Reveal the bottom section tabs to view COH Accruals Add On section.

Reviewing and Editing Time and Attendance Data

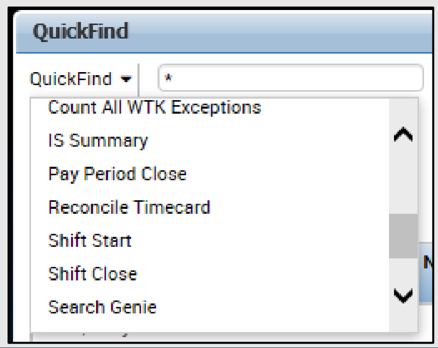
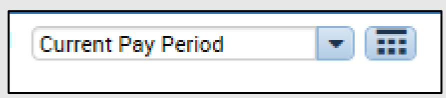
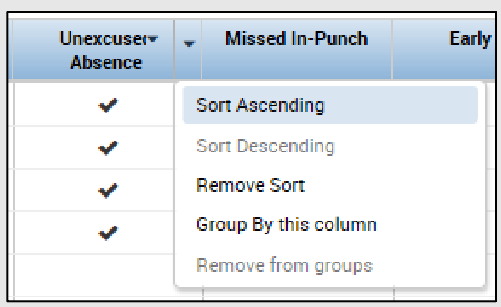
Reviewing Employee Data Using a Genie

Purpose

UKG Genies present customized views of employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to time, labor, scheduling, and attendance needs.

Example

You want to look for all employees who have unexcused absences in the previous pay period. Use the Reconcile Timecard Genie to perform this task.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the QuickFind Genie, click the drop-down list and select Reconcile Timecard genie.</td><td>
</td></tr>
<tr><td>2</td><td>Select the specific time period from the Time Period drop-down list.</td><td>
</td></tr>
<tr><td>3</td><td>To sort, hover over the column and click the arrow that appears. From the drop-down list select how you want to sort.</td><td>
</td></tr>
</table>

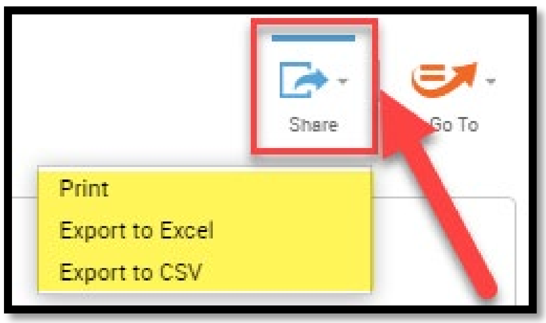
Exporting Genie Data

Purpose

UKG Genies display critical information in an easy-to-read format. You can export this information to other applications, such as Microsoft Excel, where you can reformat the data for your business needs. For Example, you can save labor information in the Reconcile Timecard Genie with an Excel file extension and then open it with Microsoft Excel to summarize the data in each column. You can also export the data to a CSV (Comma Separated Value) file to make it available to other applications such as Lotus 1-2-3.

Example

On a regular basis, you export timecard data to Microsoft Excel to perform further data analysis.



Steps	
1	Access a Genie, such as the **Reconcile Timecard** Genie.
2	Click **Share**.
3	Choose the export option: **Print, Export to Excel** or **Export to CSV**.

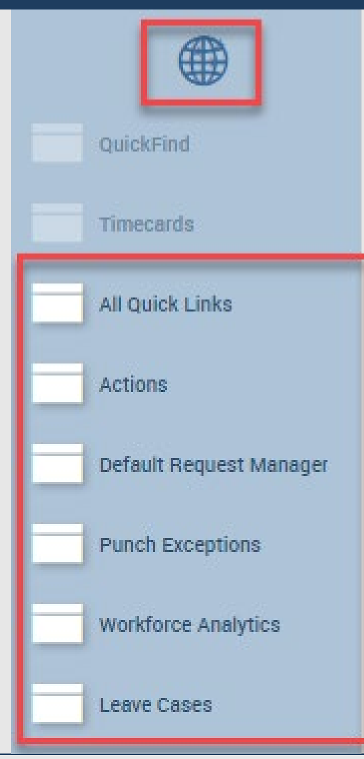
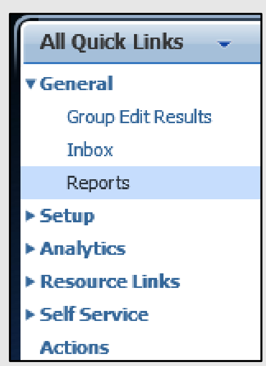
Generating Reports

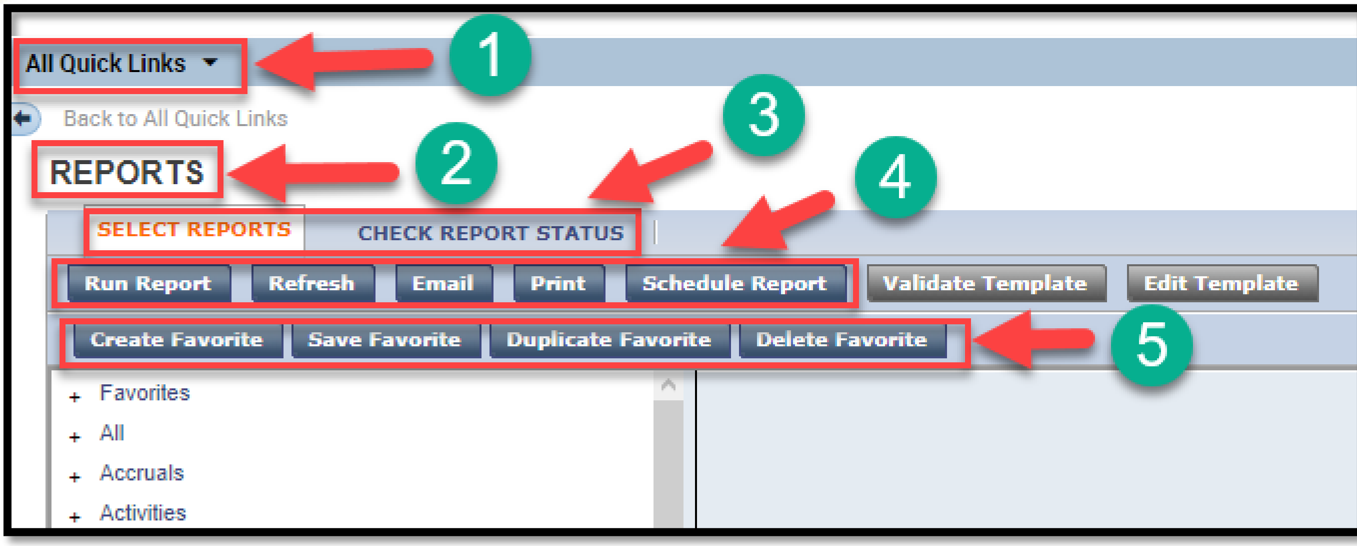
Purpose

You can generate reports on a daily, weekly, pay period basis, or any time you need information to accomplish your business tasks.

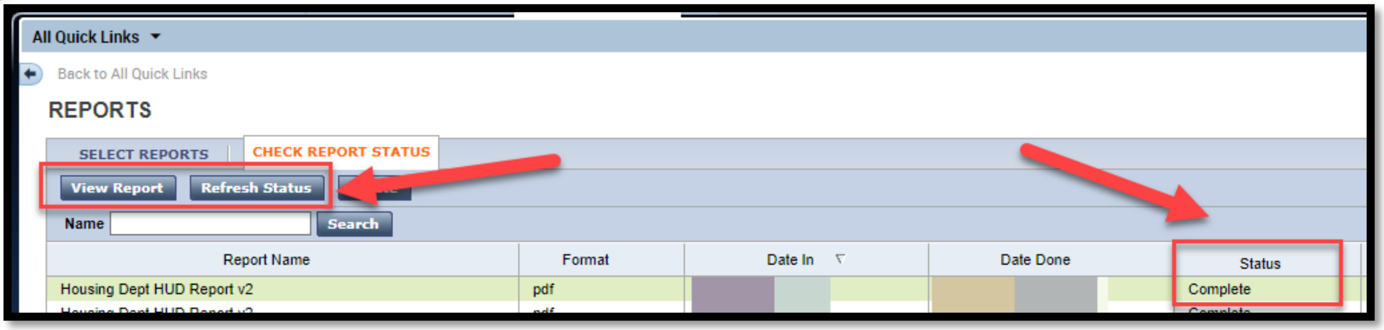
Example

For auditing and validation ***purposes***, you want to review all timecard data for employees for the previous pay period. Generate a **Time Detail report** to review this information.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the Related Items pane, select All Quick Links.</td><td>
</td></tr>
<tr><td>2</td><td>Click General > Reports.</td><td>
</td></tr>
</table>



Steps	
3	On the **Select Report** tab, click the plus **(+)** to display a category's contents. Click a report name and review its description to ensure that the report returns the data you need.
4	If you selected employees in a Genie, verify that **Previously Selected Employee(s)** appears in the **Show** field. Or, select a different set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.
5	1. To generate a report, click **Run Report**. 2. To generate a report and automatically e-mail it to recipients, click **E-mail**. Fill in the **Recipients** field in the E-mail dialog box and click **OK**. Then click the **Check Run Status** tab.



Steps	
6	Review information in the **Status** column. Click **Refresh Status** several times until **Complete** or **Failed** appears in the **Status** column.
7	1. To view a report, click a report name to highlight it and do any of the following: a. To use menu options, click **View Report**. b. To use mouse options, double-click the report name. c. To print the report to a local printer, select **File > Print** and then select a printer from the list. d. To send a report in an e-mail message, select **File > Send > Page by E-mail** and complete the e-mail message contained in your default e-mail client.

The following is an Example of a Time Detail report:

Time Detail

Time Period: Current Pay Period
Query: Previously Selected Employee(s)
Actual/Adjusted: Show hours credited to this period only.

Data Up to Date: 1/31/2011 6:15:03 PM
Executed on: 1/31/2011 6:14:48 PM
Printed for: C99901
Insert Page Break After Each Employee: No

Employee: Blake, Edna **ID:** C99912 **Time Zone:** Central
Status: Active **Status Date:** 1/7/2011 **Pay Rule:** COH NE CT
Primary Account **Start** **End**
6500070002/10000311/099/30034528/-/X810/20000568 1/7/2011 Forever

Date/Time *Xfr/Move: Account*	Apply To	In Punch *Comment*	In Exc	Out Punch	Out Exc *Xfr: Work Rule*	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
1/10/2011		8:00:00 AM								0.00	0.00
					MO						
1/11/2011		8:00:00 AM		5:00:00 PM						8.00	8.00
1/12/2011		8:00:00 AM		5:00:00 PM						8.00	16.00
1/13/2011		8:00:00 AM		5:00:00 PM						8.00	24.00
1/14/2011		8:00:00 AM		5:00:00 PM						8.00	32.00
1/17/2011		8:00:00 AM		5:00:00 PM						8.00	40.00
1/18/2011		8:00:00 AM		5:00:00 PM						8.00	48.00
1/19/2011		8:00:00 AM		5:00:00 PM						8.00	56.00
1/20/2011		8:00:00 AM		5:00:00 PM						8.00	64.00
1/21/2011		8:00:00 AM		5:00:00 PM						8.00	72.00

Labor Account Summary	Pay Code	Hours	Money	Days
6500070002/10000311/099/30034528/-/X810/20000568				
	BASE - Base Pay	64.00		
	FMLA Qualifying Hours - c	88.00		
	HACC - HOL Accrued	8.00		
	HOLP - Holiday Credit Paid	8.00		
	HWKP - HOL Wkd Hours Paid	8.00		
	MSP Qualifying Hours - c	88.00		

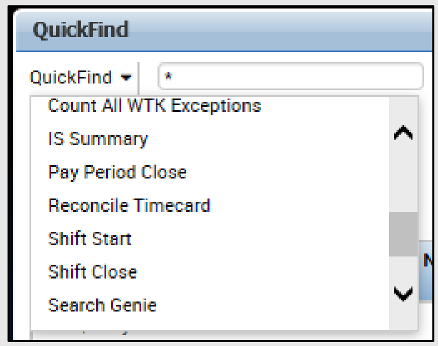
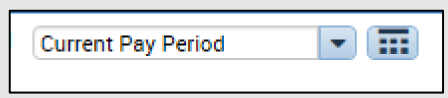
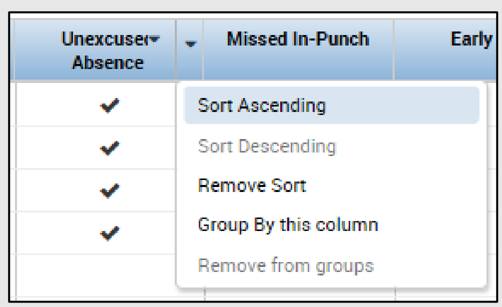
Accessing Employees' Timecards

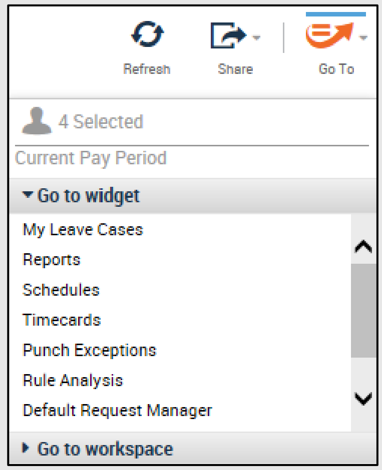
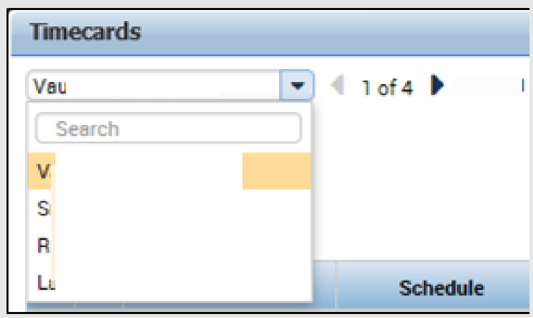
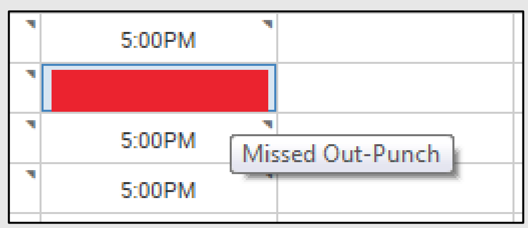
Purpose

Use Genies to quickly review and monitor employees' time and attendance data. From a Genie, you can open employees' timecards so that you can make any adjustments prior to payroll processing.

Example

In reviewing the Reconcile Timecard Genie, you notice that several employees have time and attendance exceptions. You will open the timecards of each of these employees to review and adjust the data.

Steps		
1	In the **QuickFind** Genie, click the drop-down list and select **Reconcile Timecard** genie.	
2	Select the specific time period from the **Time Period** drop-down list.	
3	To sort, hover over the column and click the arrow that appears. From the drop-down list select how you want to sort.	

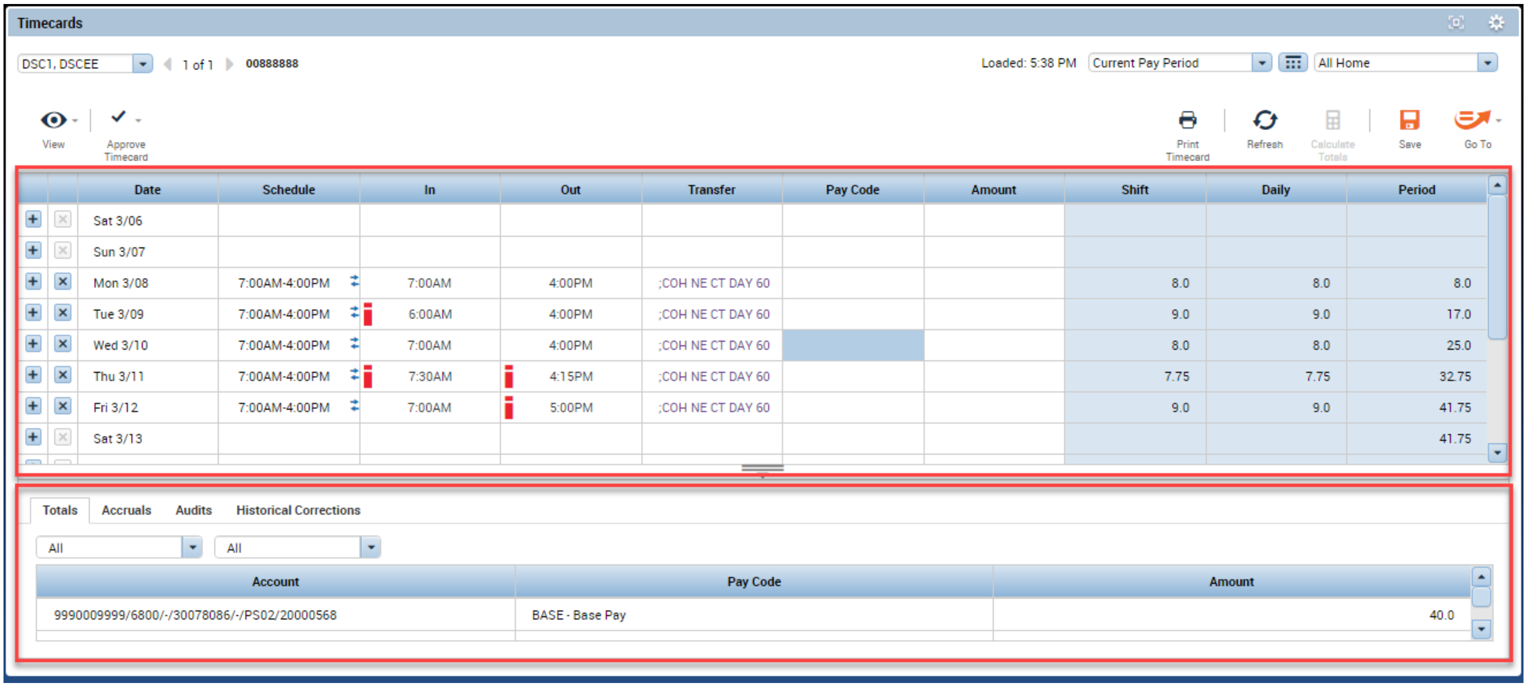
<table>
<tr><td>4</td><td>Select the name of the employee(s) whose timecards you want to review. Click Go To menu and select Timecards.</td><td>
</td></tr>
<tr><td>5</td><td>If you selected more than one employee, do one of the following:
Click the arrow icons next to the employee name list to move to the next or previous employee.
Select an employee from the Name & ID drop-down list.</td><td>
</td></tr>
<tr><td>6</td><td>Place your mouse over the exception to display its description in a pop-up message.</td><td>
</td></tr>
</table>

Tip

There are various ways to select multiple employees before using a quick link:

- To select multiple employees listed adjacent to each other
  - Click the first name, then hold down the **Shift** key and click the last name, or
  - Click one employee and drag the mouse up or down to select other employees
- To select multiple employees that are not listed adjacent to each other, click one name, then hold down the **Ctrl** key and click additional employee names

Hourly Employee Timecard Overview

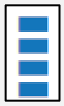
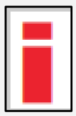
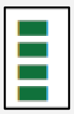
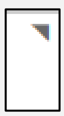
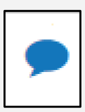
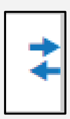
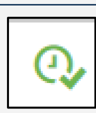


Timecard Area	Description
1 - Timecard workspace	Located in the middle of the page beneath the page header, the timecard workspace displays the following information: ➢ Menu bar that contains selections for performing timekeeping tasks ➢ Grid containing dates for the selected time period ➢ Time entry totals, including shift, daily, and cumulative amounts ➢ **Shift Total –** Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes). ➢ **Daily Total** – Calculated total hours of the selected day, including pay codes. ➢ **Cumulative** – Cumulative total up to and including the selected day. ➢ **All** – Calculated total hours for the entire visible time period.

2 - Timecard tabs	Located at the bottom of the page, the timecard tabs display additional information about how UKG tracks employee hours. Three default tabs appear: ➢ **Totals & Schedules –** The first tab at the bottom of the timecard workspace. The area on the left displays the timecard totals. The area on the right displays the Schedule for the selected time period. ➢ **Accruals –** Displays accrual codes and available balances based on the date selected in the timecard workspace. ➢ **Audits –** Lists all time punch or amount corrections made to an employee's timecard and approvals made by timekeepers/supervisors. ➢ **Note:** Additional tabs will appear based on actions you perform. For Example, the **Approvals & Sign Offs** tab appears when you approve an employee's timecard.

Visual Indicators

Visual indicators appear on a timecard when an exception occurs. For Example, an employee might forget to clock in or out, which causes a missed punch exception. An employee might clock in early or late, which causes a punch exception.

Visual indicator	Description
	An excused absence for the day, such as Vacation, Bereavement, or Jury Duty
	An unexcused absence for the day An exception, such as a late or early punch, or a short or long break
	Exception has been marked as reviewed
	A missed punch
	A transaction that was added by the UKG application
	One or more comments are attached to the punch or amount.
	Shift Transfer
	Approved Overtime

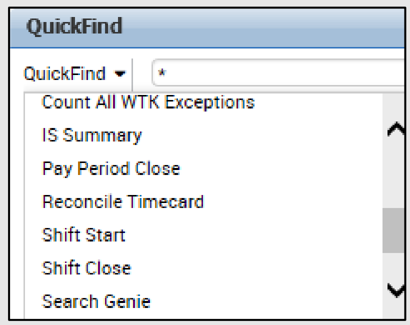
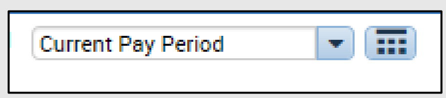
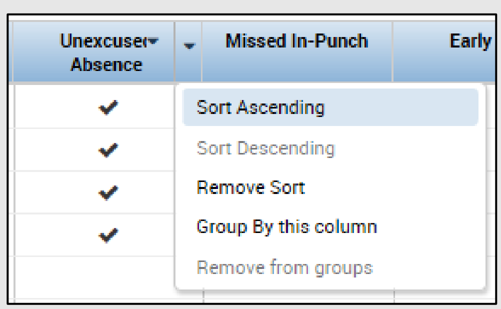
Adding Missed Punches

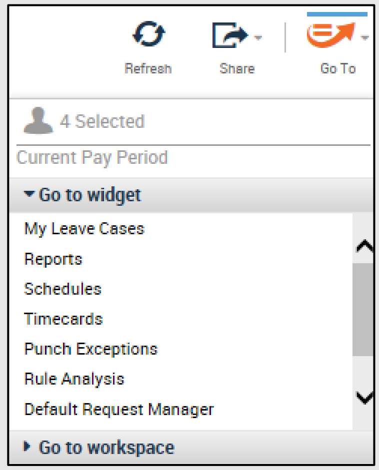
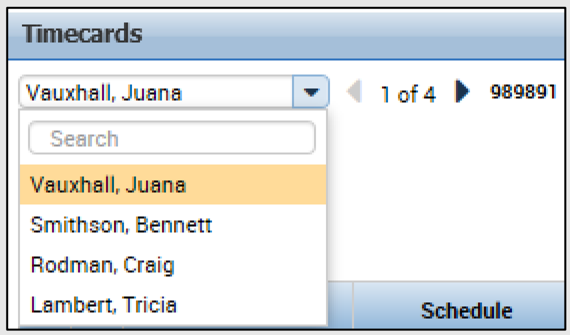
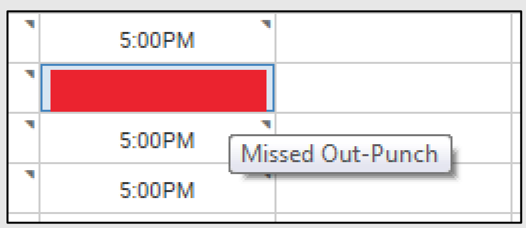
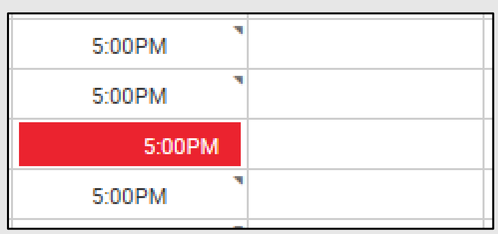
Purpose

An employee might forget to punch in or out. When this happens, a solid red box appears in the missed In or Out cell. To add that punch, you click the cell and type the missed time. The application accepts multiple formats for entering punches in a timecard.

Example

An employee notified you that she forgot to punch out on Monday. The employee started her shift at 8:00 A.M. and ended her shift at 5:00 P.M. From the Reconcile Timecard Genie, access the employee's timecard and add the 5:00 P.M. out punch on the employee's timecard for Monday.

Steps		
1	In the **QuickFind** Genie, click the drop-down list and select **Reconcile Timecard** genie.	
2	Select the specific time period from the **Time Period** drop-down list.	
3	To sort, hover over the column and click the arrow that appears. From the drop-down list select how you want to sort.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>4</td><td>Select the name of the employee(s) whose timecards you want to review. Click Go To menu and select Timecards.</td><td>
</td></tr>
<tr><td>5</td><td>If you selected more than one employee, do one of the following:
• Click the arrow icons next to the employee name list to move to the next or previous employee.
• Select an employee from the Name & ID drop-down list.</td><td>
</td></tr>
<tr><td>6</td><td>Locate the missing punch by looking for the red cell in the timecard.</td><td>
</td></tr>
<tr><td>7</td><td>Click in the cell and enter 5:00PM. Tab out of the cell.</td><td>
</td></tr>
<tr><td>8</td><td>Click Save.</td><td>
</td></tr>
</table>

Refreshing and Saving Data in Timecards

Purpose

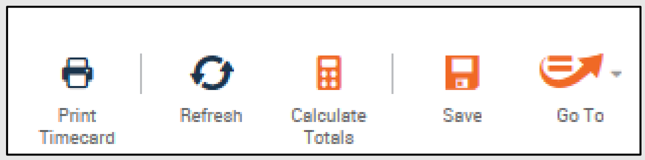
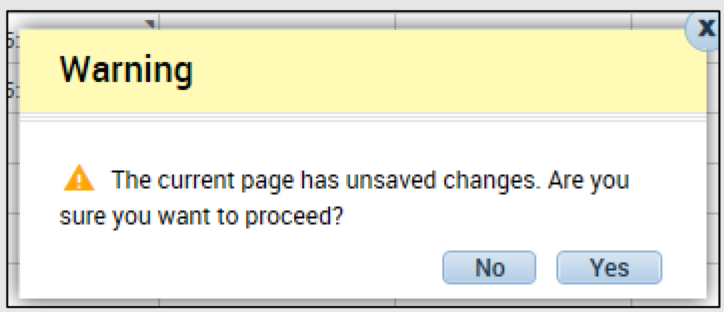
When you add and modify timecard data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can decide whether the edits are what you want.

Example

You have been editing the timecard of one of your employees when you realize that you entered the wrong information. You cancel the edits, edit the correct information and save it.

Canceling edits

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Perform one or more edits on a timecard. Notice the Save icon is orange indicating the data is unsaved.

To cancel any edits, click the Refresh icon.</td><td>
</td></tr>
<tr><td>2</td><td>Verify that you want to proceed with cancelling the edits.</td><td>
</td></tr>
</table>

Saving edits

Steps	
1	Perform one or more edits on a timecard. Notice the **Save** icon is orange indicating unsaved data.
2	Click **Save**.
3	Review the employee's timecard to ensure that the visual indicators no longer appear, validating that your information was saved.

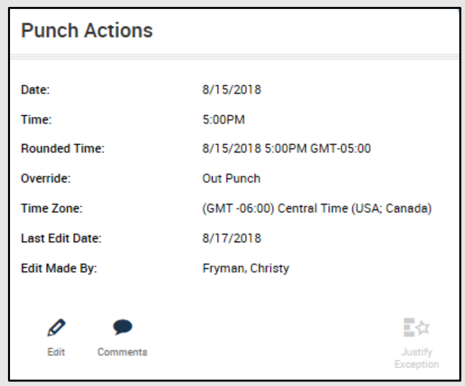
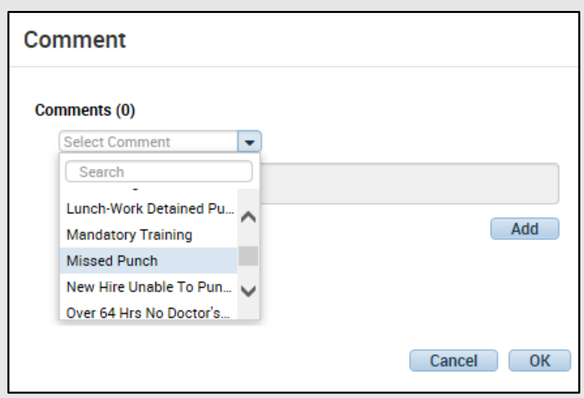
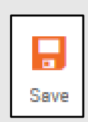
Attaching Comments to Punches

<u>Purpose</u>

Comments are predefined descriptive phrases that you attach to a punch or amount to provide additional, useful information about that transaction. You can attach as many comments as needed to explain the punch or amount. You can also add free-text notes to comments for additional clarification.

Example

After adding an employee's missing out punch, you now add a comment to the punch.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Locate and right-click the cell to which you want to add a comment.</td><td>
</td></tr>
<tr><td>2</td><td>In the Punch Actions window, click Comments.</td><td>
</td></tr>
<tr><td>3</td><td>In the Comments window, select one or more comments from the list.
Tip: Hold the Ctrl key to select more than one comment.</td><td>
</td></tr>
<tr><td>4</td><td>Click OK.</td><td>
</td></tr>
<tr><td>5</td><td>Click Save.</td><td>
</td></tr>
</table>

Business practice

It is a best practice to include comments when applying edits to an employee's timecard.

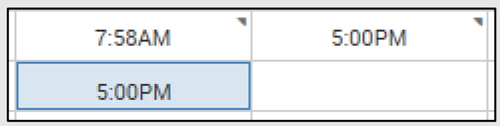
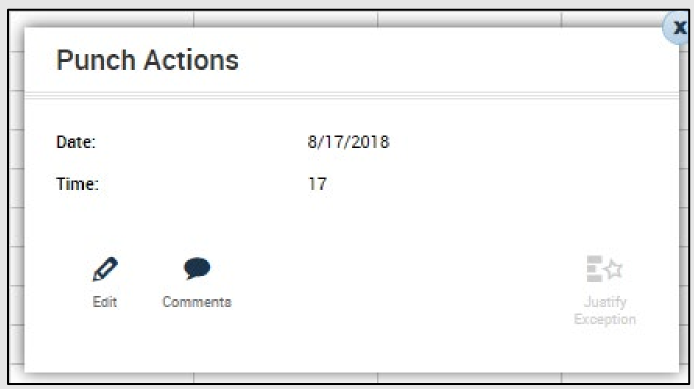
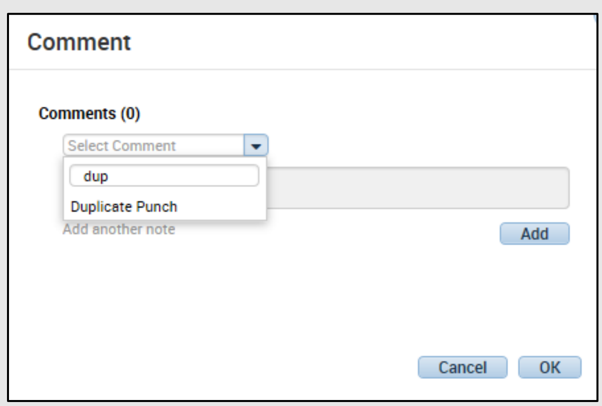
Deleting Punches with a Comment

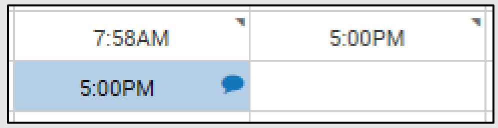
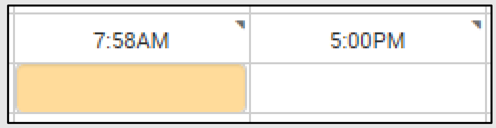
Purpose

As a rule, ***you should not delete punches*** from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For Example, an employee might punch twice when starting or ending a shift. When this occurs, you will want to delete the extra punch. The Audits tab provides a record of all timecard edits, including any punches that you delete.

Example

An employee could not remember if he punched out at the end of his shift. He punched out a second time to ensure that he recorded his end-of-shift time. While reviewing the employee's timecard, you notice that two out punches appear for the employee's end of shift. You want to delete the employee's second out punch, but first you need to add a comment to that punch. The comment will appear in the audit trail. From the **Reconcile Timecard** Genie, access the employee's timecard, then add a comment to and delete the duplicate out punch.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>In the timecard, click the cell that contains the punch you want to delete.</td><td>
</td></tr>
<tr><td>2</td><td>Right-click the cell and select Comments.</td><td>
</td></tr>
<tr><td>3</td><td>Select one or more comments from the list.
Tip: Hold the Ctrl key to select more than one comment.</td><td>
</td></tr>
</table>

Steps		
4	Click **OK**.	
5	Verify that the comment icon shows in the cell.	
6	Select the cell and press **Delete**.	

Adding Pay Code Amounts to Timecards

Purpose

Pay codes keep track of the type of worked and non-worked time that is entered in the timecard.

Examples of pay codes include: Holiday, Overtime, Sick, and Vacation.

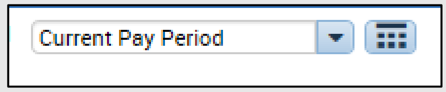
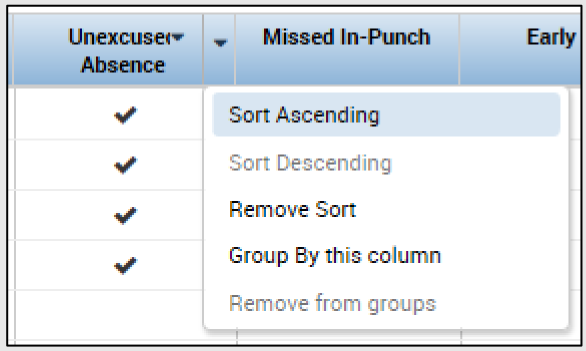
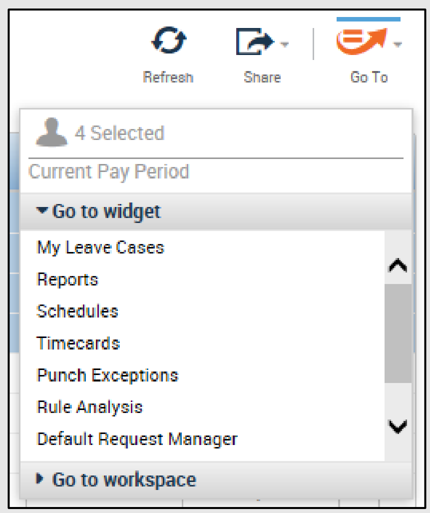
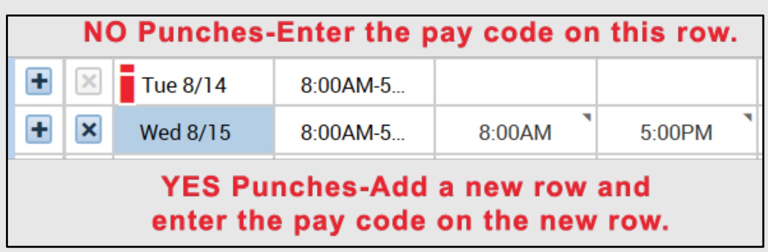
It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and use a pay code to track his or her worked or non-worked time; for Example, when the employee calls in sick.

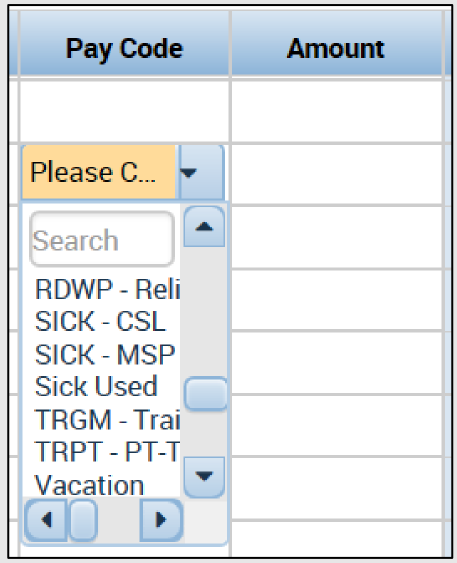
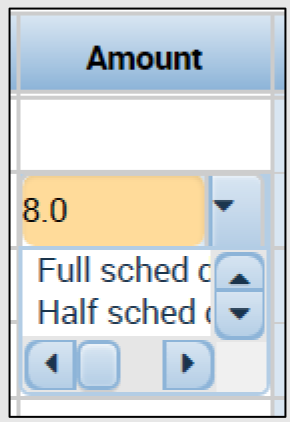
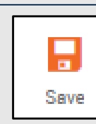
Acceptable formats for entering pay code amounts

Acceptable format	Example	Interpretation by UKG
Leading zeros (optional)	07	7:00 hours
	08:30	8:30 hours
Colon	7:30	7:30 hours **Note:** If you enter an amount without a colon UKG interprets your entry as is, which may be a much larger amount than you meant. For Example, if you enter 730 (without the colon), UKG interprets that as 730 hours.
Decimal	8.5	8:30 hours
Full Schedule Day/ Half Schedule Day	full schedule day/ half schedule day in the Amount field	Employees receive hours based on their schedule assignments for that day

Example

An employee called in sick on Tuesday. His timecard was not updated to reflect this. From the Reconcile Timecard Genie, access the employee's timecard. Add eight hours of sick time to his timecard.

Steps		
1	From the **Reconcile** Timecard Genie, select the specific time period from the **Time Period** drop- down list.	
3	Sort the **Unexcused Absence** column.	
4	Select one or more employees whose timecards you want to edit and click the **Timecard** quick link.	
5	Identify the day with the unexcused absence. Does the day already have punches? No - On the row of the date where you want to enter the pay code amount, select the pay code from the **Pay Code** drop- down list. Yes - On the row of the date where you want to enter pay code amount, click the **Insert Row** icon.	

Steps		
6	Click the **Pay Code** cell and select the pay code from the drop-down list.	
7	Click the **Amount** cell next to the pay code you selected. Enter the number of hours, using an acceptable format, or select one of the scheduling amount options.	
8	Click **Save**.	

Note

You cannot add a pay code to a row that contains punches; you must add a separate row for the pay code transaction.

Paying Employees for Meals

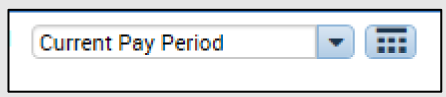
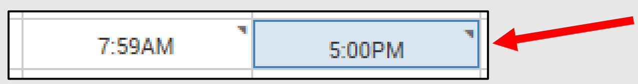
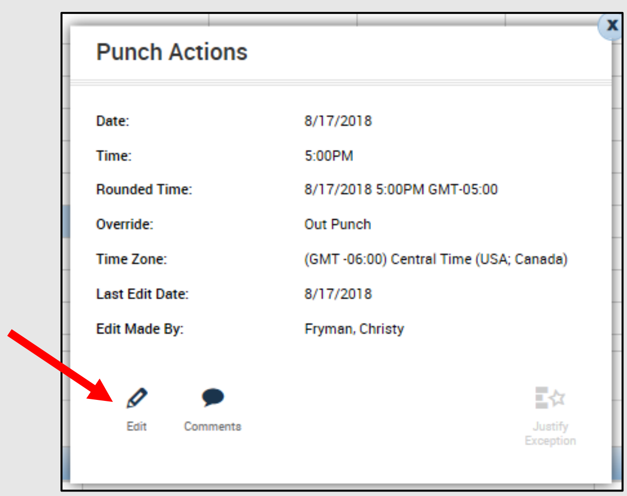
Purpose

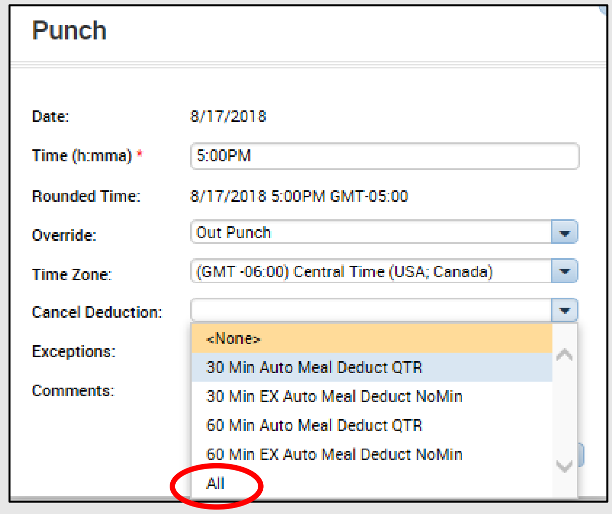
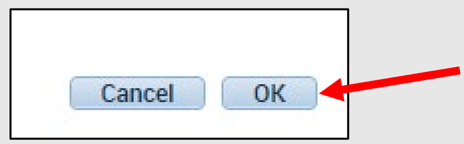
Work rules define basic time and labor conditions, such as how breaks and meal deductions occur during shifts. For Example, a work rule might stipulate that an employee must work a minimum of five hours before a meal deduction of 30 minutes is applied automatically to her time. This automatic deduction is reflected in the shift hours total. There may be times when an employee works through his or her meal, so you will need to cancel the automatic meal deduction to add the time worked to the timecard.

Example

An employee worked through her lunch break on Friday due to a heavy workload. From the Reconcile Timecard Genie, access the employee's timecard and cancel her meal deduction for Friday.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>From the QuickFind Genie, select the time period in the Time Period drop-down list.

Select the employee and double-click the employee's name to open his/her timecard.</td><td>
</td></tr>
<tr><td>2</td><td>Right-click the Out punch cell on the date you want to cancel the deduction.</td><td>
</td></tr>
<tr><td>3</td><td>Click Edit.</td><td>
</td></tr>
</table>

Steps		
4	In the **Cancel Deduction** drop-down list, select the deduction you want to cancel from the **Cancel Deduction** drop-down list. **(Be sure to select the appropriate minute deduction that ends with "QTR")**	
5	Click **OK**.	
6	Click **Save**.	

Caution

If you select a meal deduction other than the one assigned to the employee's work rule, the deduction will not be canceled. If you do not know the employee's assigned deduction rule, select **All** from the **Cancel Deduction** drop-down list.

Tip

You can restore a meal deduction cancellation by performing the same steps and selecting **<None>** from the Cancel Deduction drop-down list.

Note

A majority of employees will punch in and out at a clock for meal breaks. A limited number of employees will not have access to a clock and therefore their meals will be automatically deducted.

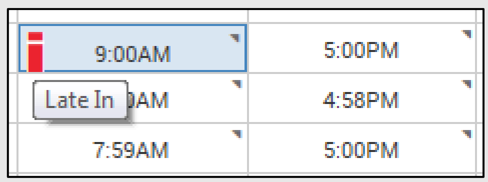
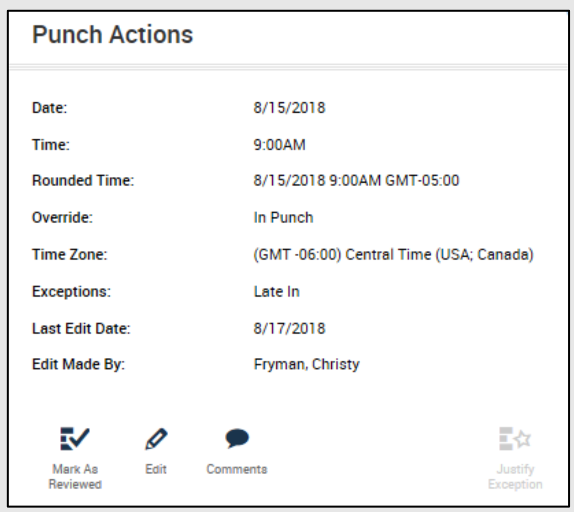
Marking and Unmarking Exceptions as Reviewed

Purpose

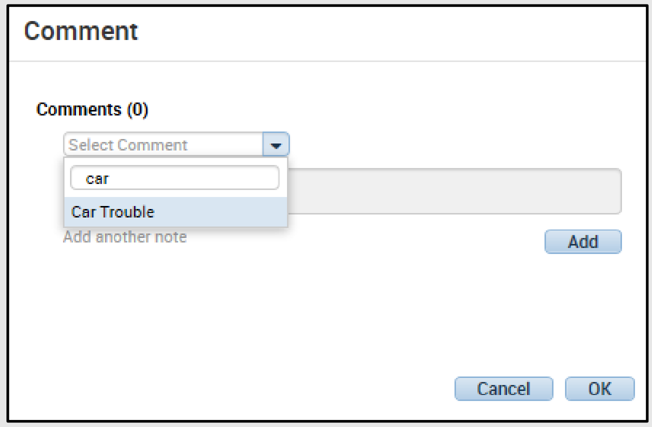
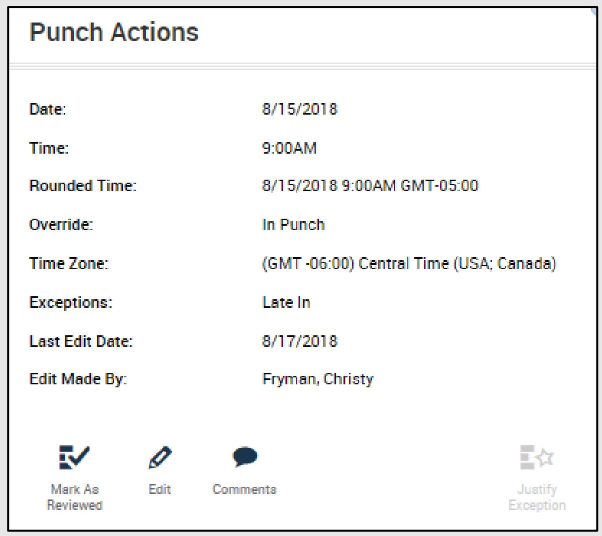
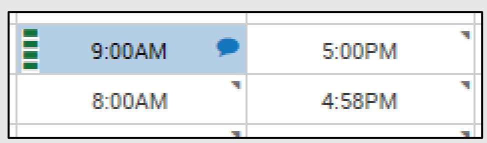
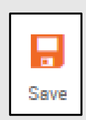
Once you have reviewed an exception and resolved it to your satisfaction, you can mark the exception as having already been reviewed. The exception will remain visible in the timecard and in genies but will no longer appear in exception reports or queries. Once the exception is marked as reviewed, a green icon will appear in the cell containing the exception. Additionally, at any time you can choose to unmark an exception as reviewed.

Example

On Wednesday an employee arrived late to work because he had car problems. You add a comment to the employee's late in punch as a reminder of why the employee did not work his entire shift. Then you mark the exception as reviewed so that you do not re-check it again at a later date.

Steps		
1	In the timecard, ***right-click*** the cell containing the exception.	
2	In the **Punch Actions** menu, click **Comments**.	

Steps

3	In the **Comment** window, select the appropriate comment. Click **OK**.	
4	Right-click the cell again. In the **Punch Actions** window, click **Marked As Reviewed**.	
5	Verify that the green icon and the comment icon are displayed.	
6	Click **Save**.	

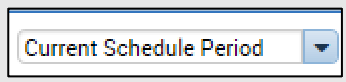
Transferring Hours for Entire Shifts

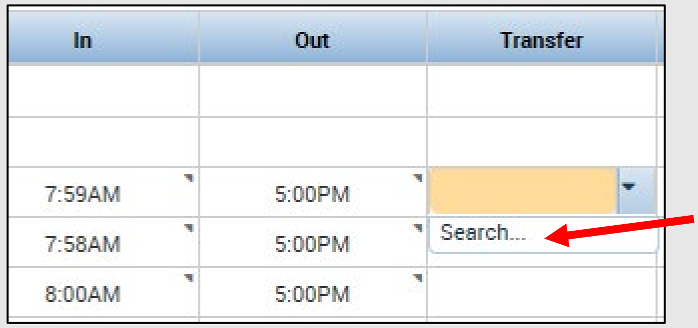
Purpose

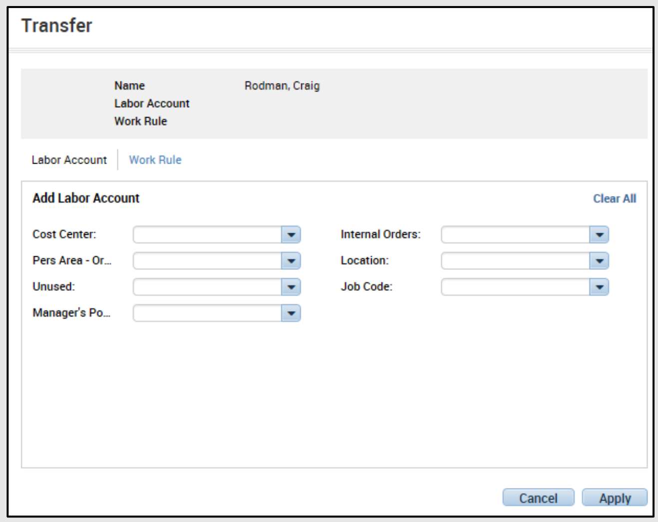
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged, and the right work rule is applied. You or the employee can record the transfer at a terminal or directly in the schedule or timecard.

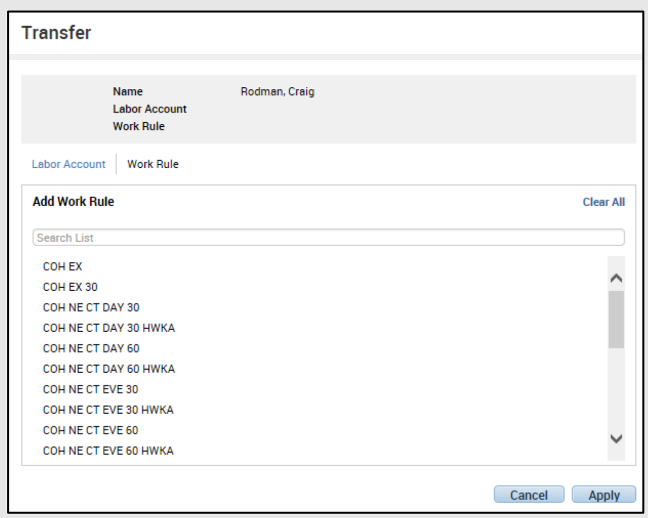
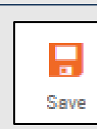
Example

On Monday an employee worked eight hours in a specific DAC, which is not her primary assignment. Access the employee's timecard and transfer the eight hours of worked time for Monday of the previous pay period to the applicable DAC.

Steps		
1	In the **Reconcile Timecard** Genie, select the time period from the **Time Period** drop-down list. Double-click the employee's name you want to transfer.	
2	Click the **Transfer** cell in the row for the for the date you want to record the transfer.	
Steps		

<table>
<tr><td>3</td><td>If the labor account or work rule does not appear in the Transfer list, select Search.</td><td>
</td></tr>
<tr><td>4a</td><td>To transfer hours to another labor account, click a labor level option and select the labor level from the Available Entries list.

Click Apply.</td><td>
</td></tr>
<tr><td>4b</td><td>To transfer hours to another work rule, select the work rule from the Work Rule drop-down list.

Click Apply.</td><td>
</td></tr>
<tr><td>5</td><td>Click Save.</td><td>
</td></tr>
</table>

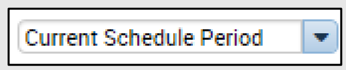
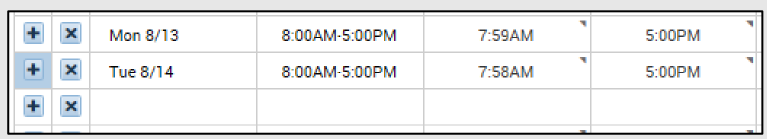
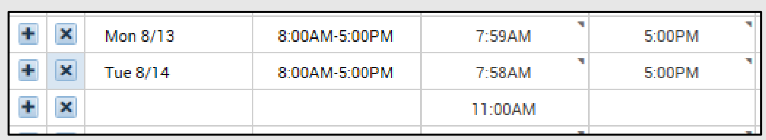
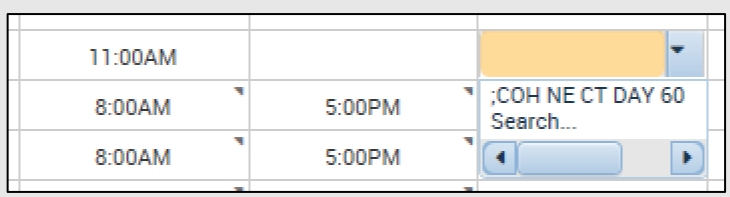
Transferring Hours for Parts of Shifts

Purpose

Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule for a portion of his or her shift. You need to record the transfer in the application so that the right labor account is charged, and the right work rule is applied. You or the employee can record the transfer at a terminal or directly in the schedule or timecard.

Example

On Tuesday an employee worked in a DAC, which is his primary labor account assignment, from 8:00 A.M. to 11:00 A.M. He then worked in another DAC from 11:00 A.M. to 5:00 P.M. Access the employee's timecard and transfer his worked hours for Tuesday of the previous pay period from 11:00 A.M. to 5:00 P.M.to the applicable DAC.

Steps		
1	In the **Reconcile Timecard** Genie, select the time period from the **Time Period** drop-down list. Double-click the employee's name you want to transfer.	
2	Locate the day you want to add a partial transfer. Click the plus icon (**+**) to add a new row.	
3	In the new row **In** punch, enter the time the transfer begins.	
4	Click the **Transfer** cell in the new row and select the transfer. If the labor account or work rule ***does not*** appear in the Transfer list, select **Search**.	
5	Click **Save**.	

Historical Edits

Purpose

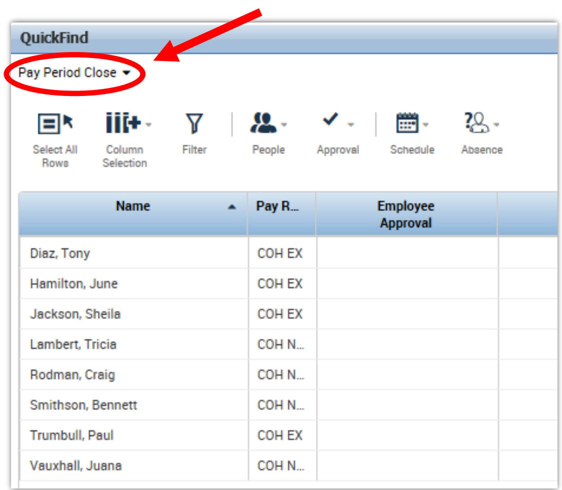
Once a pay period has been closed, only Central Payroll can make changes to an employee's timecard.

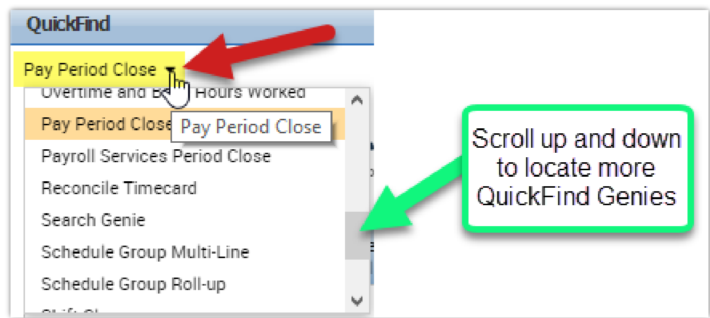
Finalizing Timecards

Reviewing Time Data Using the Pay Period Close Genie

Purpose

The Pay Period Close Genie helps you to identify timecard discrepancies at the end of a pay period so that you can perform any final edits. You must correct all exceptions before time data is signed off by Payroll and timecards are locked. Otherwise, employees may not get paid correctly for that pay period.





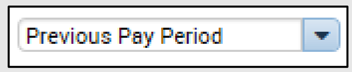
Approving Individual Timecards

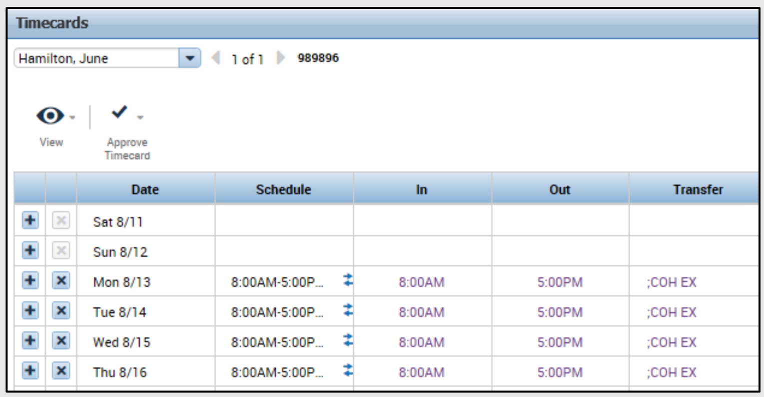
Purpose

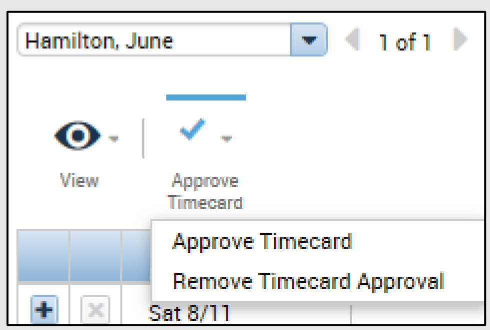
After you finish editing your employees' timecards, you need to approve them to indicate to payroll that they are ready for processing. You can approve timecards on a Genie or on a timecard itself. After you approve a timecard, the employee cannot make any edits to it unless you remove your approval.

Example

You have reviewed the employee’s time data and performed all necessary edits. You approve the employee’s time for the previous pay period on her timecard.

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>From the Pay Period Close Genie, select Previous Pay Period from the Time Period drop-down list.</td><td>


</td></tr>
<tr><td>2</td><td>Double-click the employee’s name whose timecard you want to approve.</td><td>


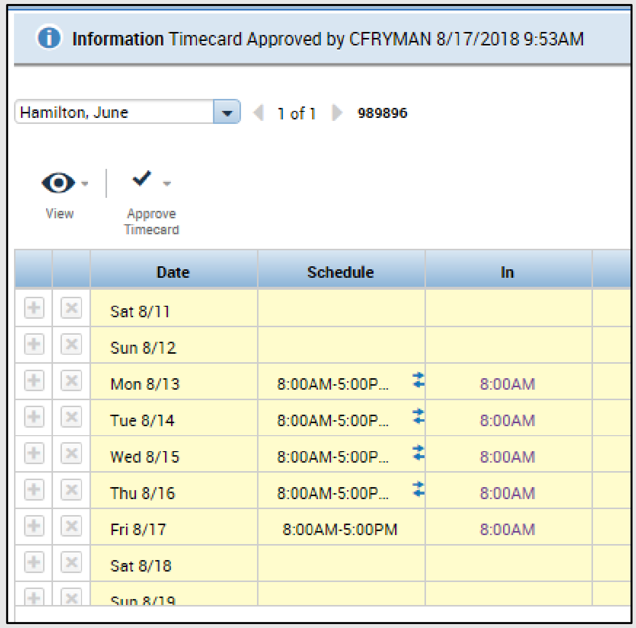
</td></tr>
<tr><td>3</td><td>Click Approve Timecard > Approve Timecard.</td><td>


</td></tr>
</table>

Steps

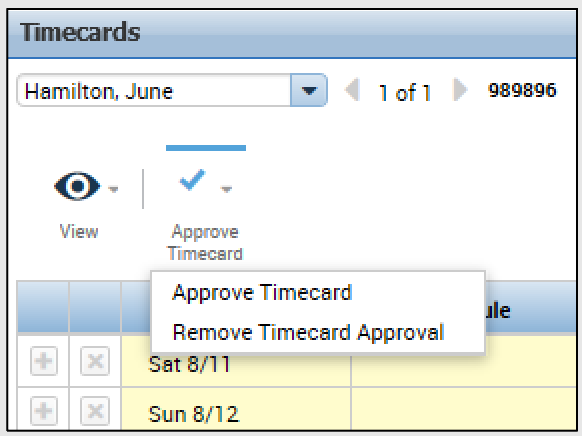
4

A message will appear confirming the approval and the timecard will change color.



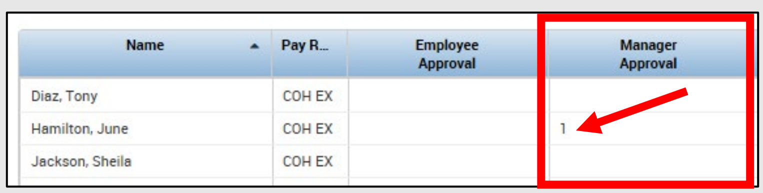
5

To remove the approval, click **Approve Timecard > Remove Timecard Approval**.



6

In the **Pay Period Close** Genie, there will be a **1** in the **Manager Approval** column indicating the employee's timecard has been approved.



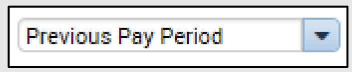
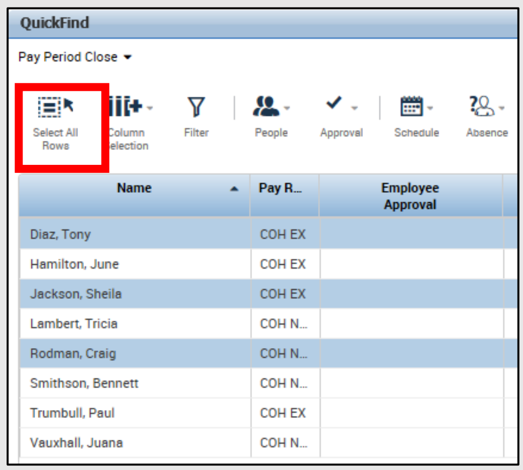
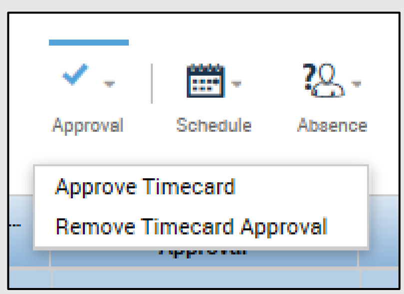
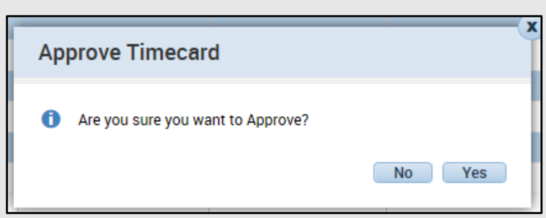
Approving Multiple Timecards

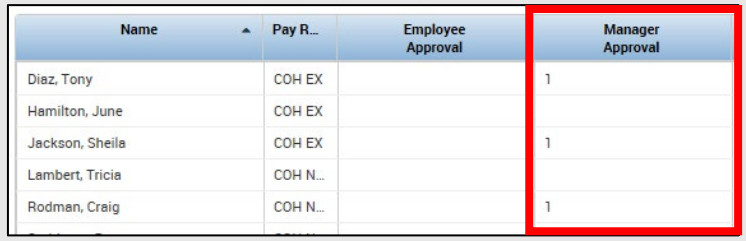
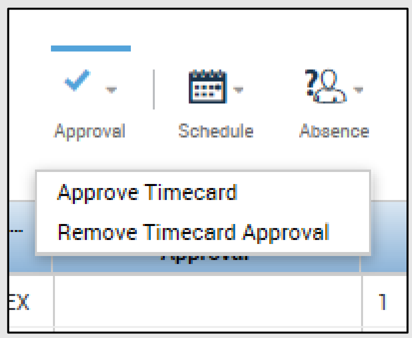
Purpose

Once you have reviewed and updated your employees' timecards, you can approve them all at once, rather than approving them individually. When you approve multiple timecards at once, use the Group Edit Results page to confirm that all of them are approved. If one or more of the timecards are not approved, the Details link on the Group Edit Results page identifies whose timecard was not approved and why.

Example

You have reviewed and completed final edits to your employees' timecards. You will approve them all at once.

Steps		
1	From the **Pay Period Close** Genie, select **Previous Pay Period** from the **Time Period** drop-down list.	
2	Select the employees you whose timecards you want to approve. **Note:** If you want to approve everyone's timecard, click **Select All Rows**.	
3	Click **Approve Timecard > Approve Timecard**.	
4	Verify you want to approve all timecards selected.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>To verify that the timecards have been approved, click the Refresh icon.</td><td>
</td></tr>
<tr><td>6</td><td>There will be a 1 in the Manager Approval column indicating the employee’s timecard has been approved.</td><td>
</td></tr>
<tr><td>5</td><td>To remove the approval, click Approve Timecard > Remove Timecard Approval.</td><td>
</td></tr>
</table>

Business practice

After you approve one or more employees’ timecards, they are no longer editable. If the need arises and you have the appropriate permissions, you can remove your approval. After you remove your approval, you can make the necessary timecard edits and then re-approve the timecards.

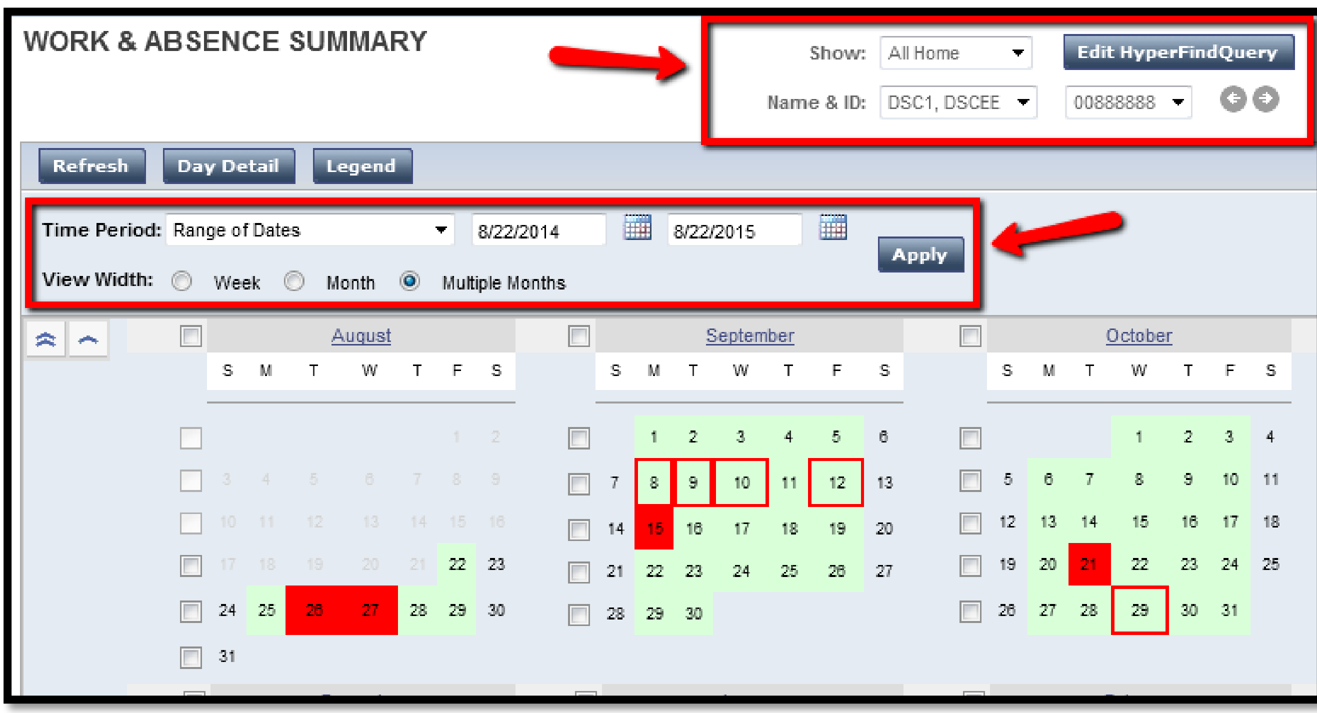
Performing Additional Timekeeper/Supervisor Tasks

Using the Work & Absence Summary Calendar

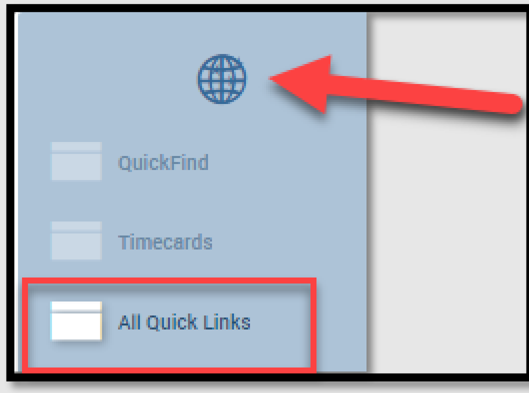
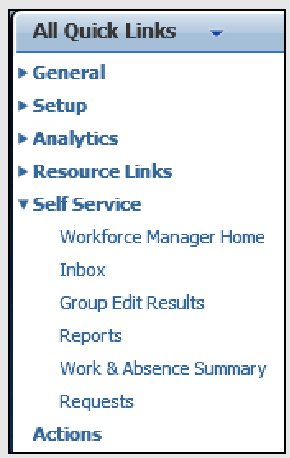
Purpose

You can use the Work & Absence Summary calendar to identify trends in worked and time-off events for employees. The calendar-like display makes it easy for you to see whether an employee has a pattern of taking time off or of arriving late on a specific day. You can see trend information such as the following:

- Number of days the employee has arrived late to work
- Number of Mondays the employee has called in sick
- Number of weekends the employee is scheduled and has worked



To navigate to the **Work & Absence Summary Calendar.**

Steps		
1	From the **Related Items** pane, select **All Quick Links**.	
2	Click **Self Service > Work & Absence Summary**.	

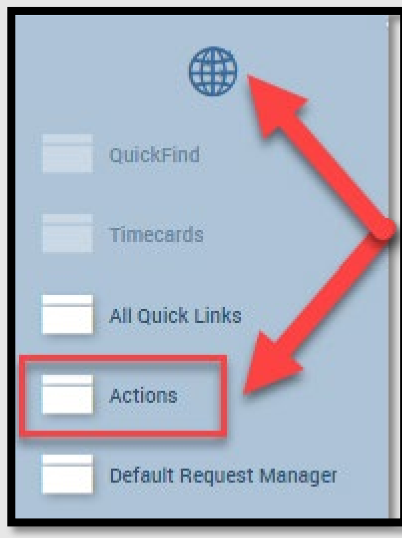
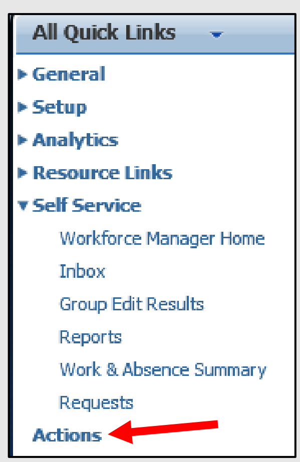
Requesting Backup Coverage

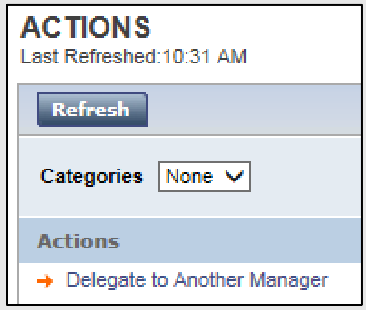
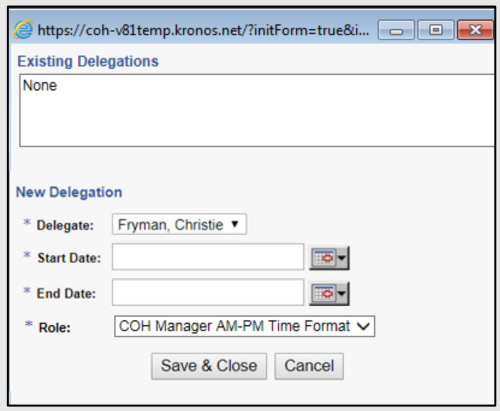
Purpose

You can temporarily delegate your timekeeper/supervisor authority to perform your timekeeping and scheduling tasks to other timekeepers/supervisors. The other timekeepers/supervisors can perform your tasks using their own user names and passwords. For Example, they can modify schedule shifts for absent employees, or review and approve timecards. This allows the business process to keep moving, even when you are not there. All edits they perform are recorded and assigned to their names for audit Purposes. You can only delegate to one (1) supervisor at a time.

Example

You are going out on vacation. You send a delegation request to another timekeeper/supervisor so that you can temporarily assign your timekeeping tasks to her. This will ensure that your employees' timecards are processed for payroll on a timely basis.

Steps		
1	From the **Related Items** pane, select **All Quick Links**.	
2	Click **Actions**.	

Steps		
3	Click **Actions** widget, click **Delegate to Another Manager**.	
4	In the pop-up window, complete the **New Delegation** section. Click **Save & Close**.	
5	The application sends the delegation request to another timekeeper's/supervisor's Inbox.	

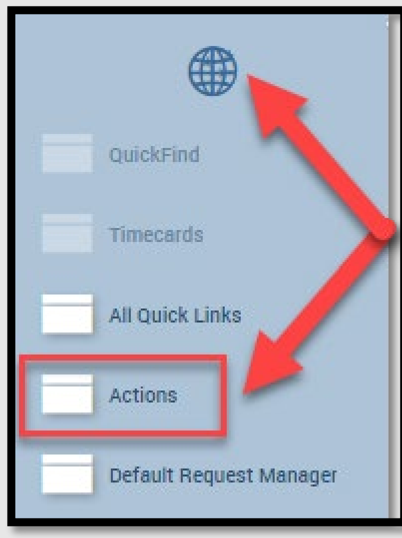
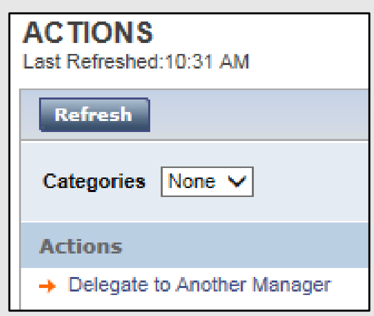
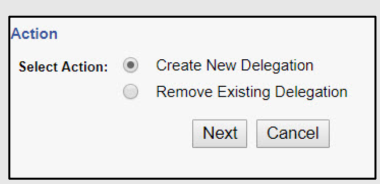
Canceling Delegation

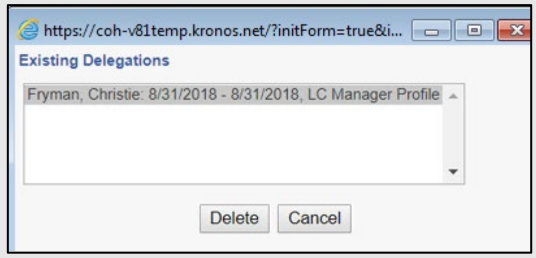
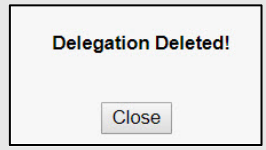
Purpose

Once the end date of delegation occurs, the application automatically removes the rights of the other timekeeper/supervisor to your tasks. You can manually end the delegation earlier.

Example

You had delegated your timekeeper/supervisor tasks to another timekeeper/supervisor through the end of next week so that you could take vacation time. You have since changed your plans and will not be taking vacation after all. Now you need to cancel the delegation.

Steps		
1	From the **Related Items** pane, select **All Quick Links**. Click **Actions**.	
2	Click **Actions** widget, click **Delegate to Another Manager**.	
3	In the **Action** window, select **Remove Existing Delegation**. Click **Next**.	

<table>
<tr><td>4</td><td>Select the existing delegation and click Delete.</td><td>
</td></tr>
<tr><td>5</td><td>Click Close.</td><td>
</td></tr>
</table>

Delegation

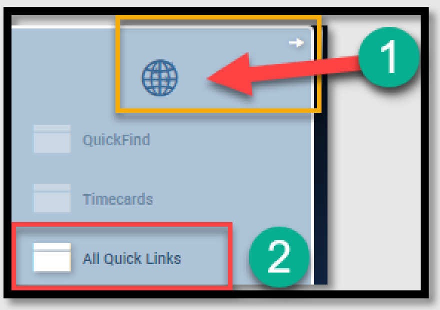
Accepting or Declining Backup Coverage Requests

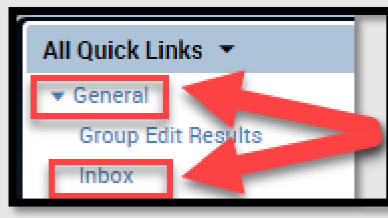
Purpose

When another timekeeper/supervisor sends you a request to cover his or her timekeeping and scheduling tasks, the application automatically places a task in your Inbox. The delegation request specifies the start and end dates and the role you will assume. You can accept or decline the request in the application.

<table>
<tr><th colspan="2">Steps</th></tr>
<tr><td>1</td><td>

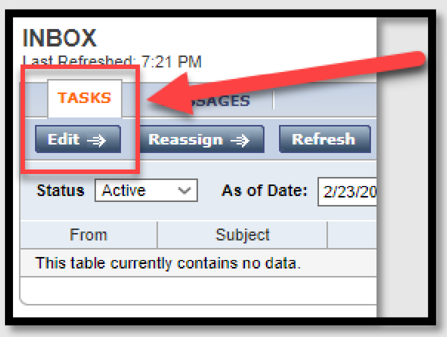
- Click on the Globe (Related Item Pane Area) located on the right-hand side.
- Next, click **All Quick Links**
- Select **General >**click on **Inbox**





</td></tr>
<tr><td>2</td><td>

From the **Tasks** tab, select the delegation request and click **Edit**.



</td></tr>
<tr><td>3</td><td>In the Action section, accept or decline the delegation request.</td></tr>
<tr><td>4</td><td>(Optional) Enter a message to the requesting timekeeper/supervisor in the Comment field.</td></tr>
</table>

Delegation

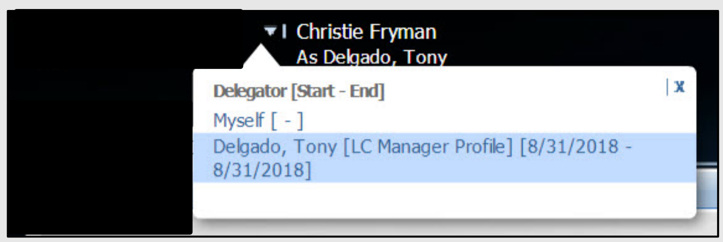
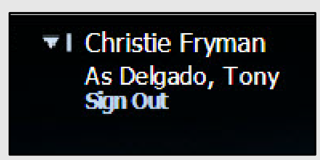
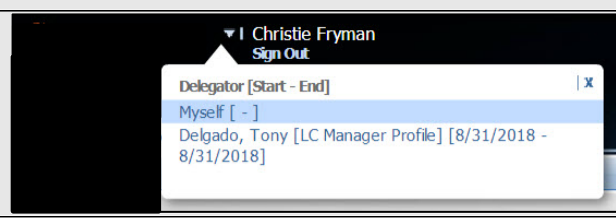
Switching to Delegated Roles

Purpose

After you accept a delegation request, the application automatically provides you with access to the tasks defined in the role profile on the specified start date. A Switch Role link appears as a quick link so that you do not have to log on as the timekeeper/supervisor who delegated the tasks to you. The link identifies which role you currently are working.

Example

Another timekeeper/supervisor delegated his tasks to you this week and you are ready to perform his timekeeper/supervisor tasks. You do not need to log off as yourself and log on as the other manager because you can switch roles while logged on with your own user name and password.

Steps		
1	Click the **Switch Role** arrow next to your name. **Note:** If you do not see the **Switch Roles** link, log off and then log on again using your own username and password. Select the timekeeper/supervisor whose tasks you will perform as his or her delegate.	
2	You'll know you have switched because of the message displayed under your name.	
3	To switch back, click the **Switch Role** arrow and choose **Myself**.	

Note

You can use the application's functions that support the tasks delegated to you to perform the delegating timekeeper's/supervisor's timekeeping and/or scheduling tasks.