Monitoring Timecards to Facilitate Payroll Processing

Reviewing Notifications of Time Data

Using the Exceptions Alert and Widget

The Exceptions widget can help you to manage employee time data exceptions quickly and efficiently. You can access the widget using the following methods:

- Clicking the Exceptions alert; this activates the Exceptions widget and moves the data to an open workspace.
- Clicking and dragging the Exceptions widget to the open workspace.
- Clicking the widget to open it in a temporary workspace.

The Exceptions Alert

The Exceptions alert quickly draws your attention to time data issues in timecards for hourly employees. It is:

- An optional configuration.
- Applicable only to hourly employees who have triggered a time data exception that requires your attention.
- Available when you log in; it displays an alerts indicator in the top center or your navigator.

Time data exceptions alerts can notify you about issues such as missed punches, late or early in punches, and late or early out punches that require your immediate attention.

The alert icon includes a number in the upper-right corner that tells you how many employees have time data issues.

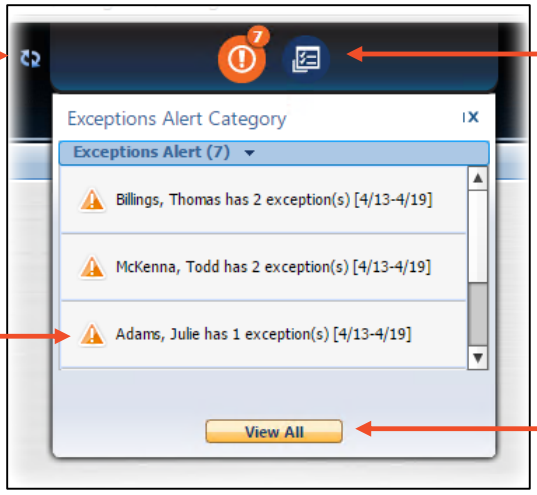
Select an employee from the list to access the Summary and Details views of the exceptions widget. When you click an employee's name, you are brought to the Details view of the Exceptions widget.

Refresh

Click the Refresh icon to get immediate updates to your alerts.

Alert Details

Click an item in the details of an alert to open the relevant widget. You can then take whatever actions are needed in the open widget.



Alert Icons

Each type of alert has its own icon. A number in the icon's corner indicates that there are items you should review. Click an icon to view details.

View All

Click to open the Alerts and Notifications widget. This provides more room for reviewing alerts, and may also include uncategorized alerts and notifications that are not actionable.

The Exceptions Widget

The Exceptions widget is a specialized widget that displays exception data for hourly employees or employees who punch in and out to track their worked time. Managers can perform most of the tasks they need to accomplish on their employees' time data in the Exceptions widget. Some of the key functions that can be performed in the detail view include:

- Add and remove punches
- Add comments
- Mark exceptions as reviewed
- Change an employee's time to their normally scheduled time

Note

The exceptions widget displays time data exceptions for hourly employees only. There are two views in the widget:

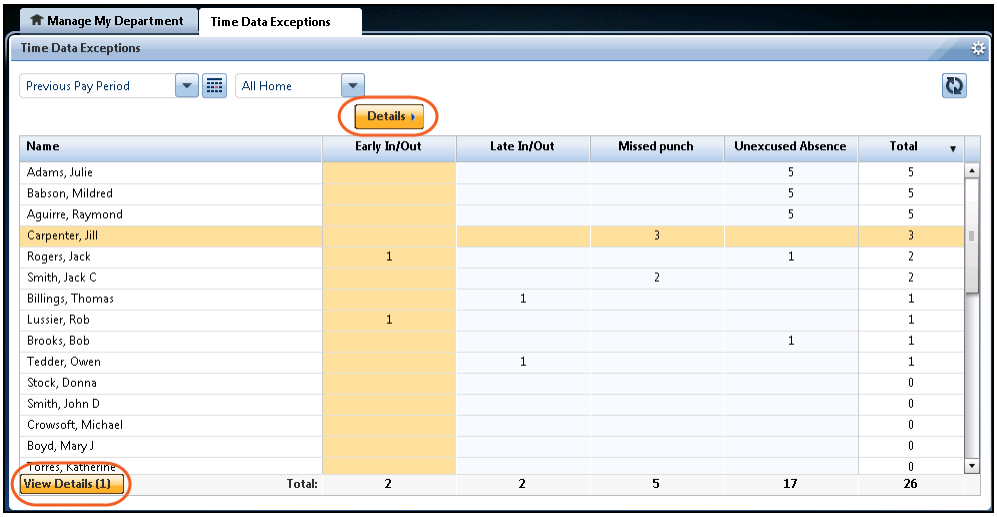
- Summary
- Details

Exceptions Summary View

The Summary view:

- Provides an at-a-glance view of employee exceptions
- Displays one or more exception types by column
- Allows your organization to configure the columns based on your business requirements
- Displays exceptions by employee

Selecting an employee activates the Details button, which allows you to view details for one employee at a time. When you hover over any column, the Details button is enabled. Selecting the Details button allows you to view details for all employees who have that type of exception.



Name	Early In/Out	Late In/Out	Missed punch	Unexcused Absence	Total
Adams, Julie				5	5
Babson, Mildred				5	5
Aguirre, Raymond				5	5
Carpenter, Jill			3		3
Rogers, Jack	1			1	2
Smith, Jack C			2		2
Billings, Thomas		1			1
Lussier, Rob	1				1
Brooks, Bob				1	1
Tedder, Owen		1			1
Stock, Donna					0
Smith, John D					0
Crowsoft, Michael					0
Boyd, Mary J					0
Torres, Katherine					0
Total:	2	2	5	17	26

Details View

The Details view is populated only when an employee has an exception. If there are no exceptions, the Details view for the employee is blank. From this view, you can:

- See the dates and exception details
- Access an employee's hourly timecard view
- Toggle to display or hide an employee's schedule
- Resolve exceptions manually or by using one of the available action buttons

Accessed from Summary view, the Details view provides access to in and out punches, schedule data, and more details about exceptions. In this view, you can also resolve exceptions and enter comments.

Visual Indicators in the Details View

The Details view provides several visual indicators to help you quickly interpret the data on the screen.

Exception Type	Details View Visual Indicator
Unexcused absence	Date displayed in red text
Early in/out or late in/out	In or out time displayed in red text
Missed punch	In or out time cell filled with solid red
Reviewed exception	In or out time displayed in green

Resolving Exceptions in the Exceptions Widget

Resolving Exceptions in the Exceptions Widget

Action Buttons is the Exceptions Widget

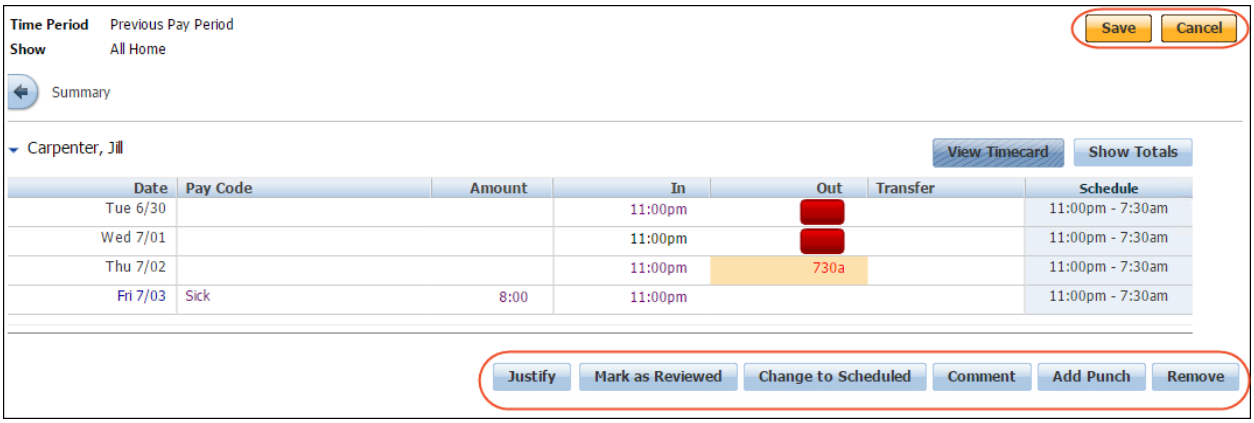
Depending on the type of exception and its status, action buttons appear along the bottom of the page. Only the relevant actions are available. The following table lists and describes the action buttons you will see in the Exceptions widget.

Action button	Description
Save	Save your changes to the database.
Cancel	Cancels changes that you made prior to saving.
Justify	Allows you to review exceptions that were either justified by employees or that need to be justified by you. You can approve the employee change, approve application-delivered resolution, or justify the exception. Once justified, the exception color changes to green.
Mark as Reviewed	Indicates that you have reviewed the exception, and that no further action is required. The color of the exception changes to green and the Mark as Reviewed button changes to Unmark as Reviewed.
Change to Scheduled	Changes a missed in or out punch to the scheduled time. This feature only works for employees who have assigned schedules.
Comment	Adds a comment, and optionally a note, to an employee's punch data.
Add Punch	Opens the Add Punch dialog box and inserts a punch time.
Remove	Removes punch data.

Note

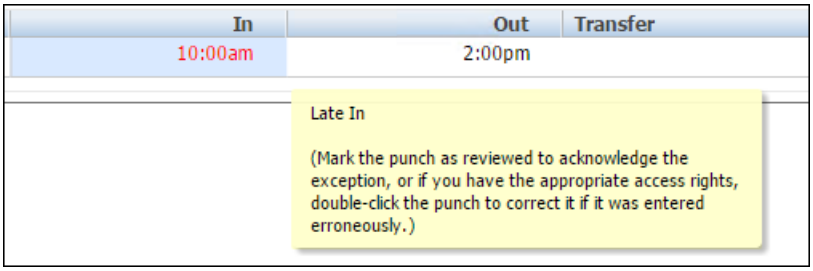
When making employee timecard edits to Justify Exceptions, your system administrator may have configured the system to allow for Standard and Cascading pay codes in addition to Duration pay codes.

The following image highlights the action buttons within the Exceptions widget.



Tool Tip for Resolving Exceptions

The Details view of the Exceptions widget provides tips for resolving each particular exception type. If you hover the cursor over a time data exception, the application displays a recommendation.



Resolving Punch Issues

Using Change to Scheduled

To fix a missed punch exception, you can use the Change to Scheduled option. This button is available only with missed punch exceptions for employees who have schedules assigned to them.

If you know that the employee started work or left on time and simply forgot to punch, click the cell containing the missed punch to activate the **Change to Scheduled** button. The button is available only when the missing punch is either the first punch of the day or last punch of the day. For missing punches in the middle of the day, only the Add Punch option is available.

Resolving a Missed Punch with Change to Scheduled

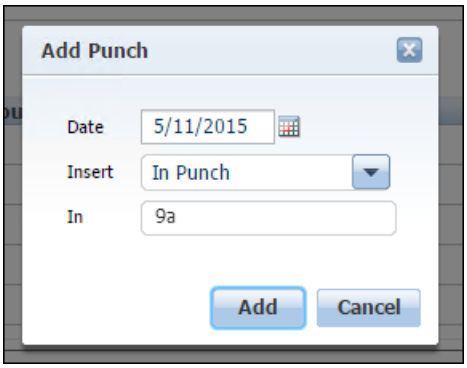
1. Access the **Time Exceptions** widget.
2. From the **Time Period** drop-down list, select the applicable pay period.
3. Select the applicable group.
4. Select the applicable employee and then click **View Details**.
5. Click the cell with the missing punch and click **Change to Scheduled**.
6. Click **Save**.

Note

The Change to Scheduled button is only available when the missing punches are either the first or last punch of the shift. For missing punches in the middle of a shift, use the Add Punch option.

Using Add Punch

The Add Punch feature allows you to enter punch information in the time data using the Add Punch dialog box. In this dialog box, you can select the punch type and enter a punch time.



Adding a Punch in the Exceptions Widget

1. In the **Details** view in the Exceptions widget, click the cell containing the exception and then click **Add Punch**.
2. In the **Add Punch** dialog box, confirm the date. From the **Insert** drop-down list, select the applicable punch option.
3. Enter the appropriate punch time and click **Add**.
4. Click **Save**. Confirm that the exception no longer appears in the time detail view.

Note

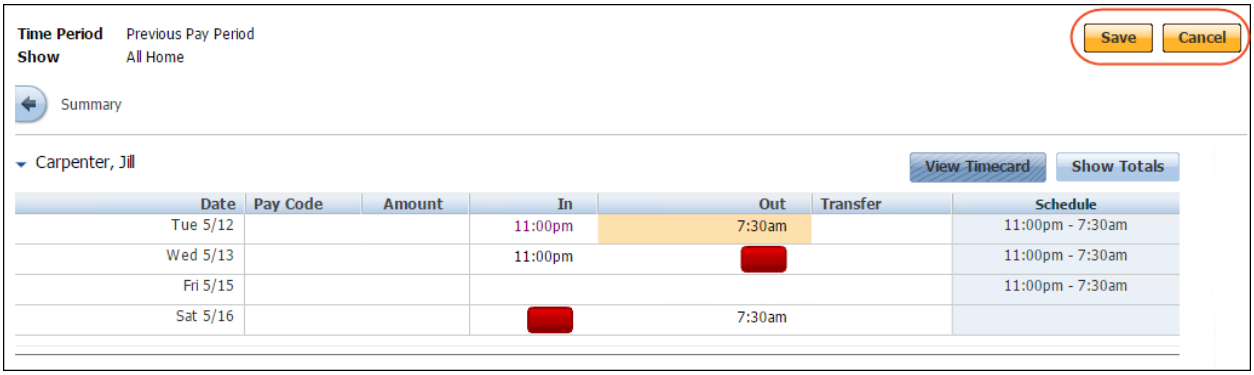
You can also double-click a punch cell and enter a punch.

Unsaved Data Indicators

When you change any time or data information in the Exceptions widget, the Save and Cancel buttons turn orange, indicating that there is unsaved data.

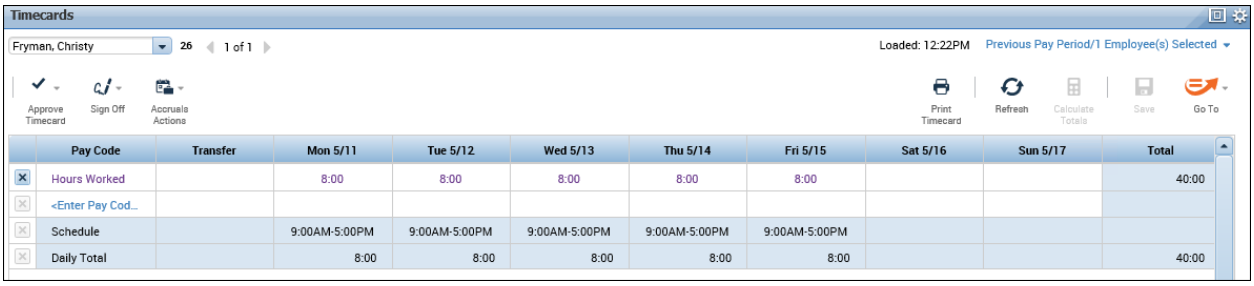
- Click **Save** to write the edits to the database.
- Click **Cancel** to refresh the data, which reverts the data to its previous condition.

When you save or cancel, both indicator buttons become inactive.



Phantom data

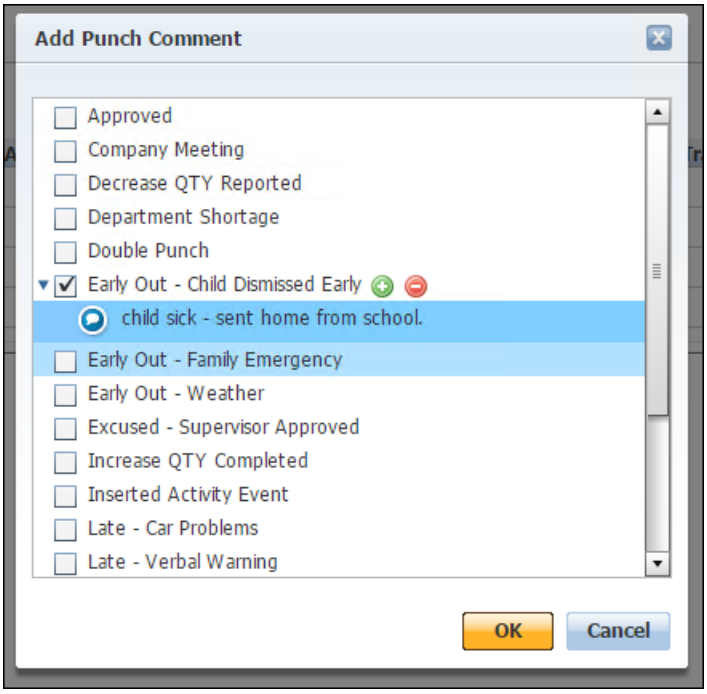
Punches and pay code amounts that appear in purple text represent phantom data. Workforce Timekeeper automatically adds these entries to a timecard based on an employee's schedule assignment.



Entering Comments

Comments are predefined, organization-specific descriptions that you attach to punches to provide additional information about that transaction.

Comments let you document specific details of worked and non-worked hours to help you with future analysis. If you have access, you can also add free-text notes to comments for clarification.



Adding a Comment

1. After making an edit within the **Time Data Exceptions** widget for an employee, access the details view.
2. Select the applicable punch.
3. Click **Comment**.
4. Select the applicable comment.
5. If applicable, click the **+** to add a clarifying note.
6. Click **OK**.
7. Click **Save**.
8. Validate that the comment is attached to the punch by hovering over the applicable punch.
9. To view any added notes, select the applicable punch and click **Comment**.
10. Scroll down and click the **+** next to the selected comment. The note text appears.
11. Click **Cancel** to exit the screen.

Marking an Exception as Reviewed

Even if alerts are not configured, managers can view summary and details of any employee time data exception by accessing the Exceptions widget. Managers can perform most of the key tasks they need to accomplish on their employees' time data in the Exceptions widget, including marking and unmarking an exception as reviewed.

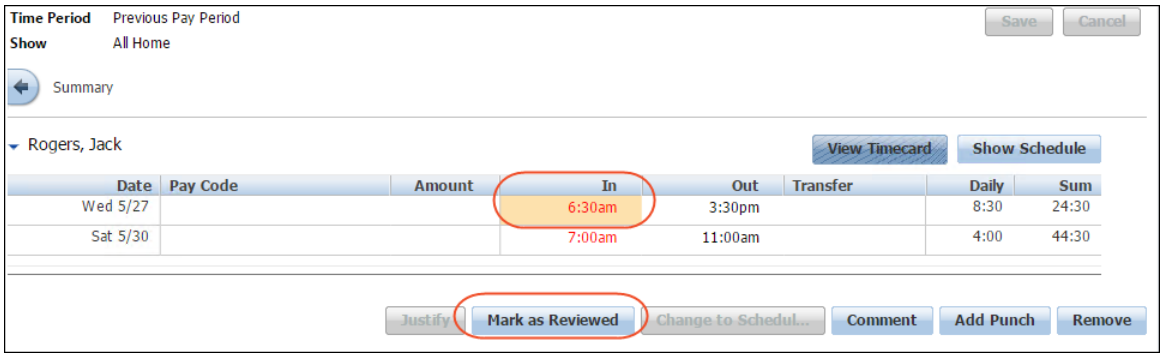
You would mark an exception as reviewed to indicate that you have seen it, and do not want to see it repeatedly in general queries and searches. Only punch exceptions can be marked as reviewed.

Note that after an exception is marked as reviewed, it disappears from the Summary view of the Exceptions widget, and it appears with a green check mark in the Reconcile Timecard Genie if all exceptions of that type have been marked as reviewed.

Marking Exceptions as Reviewed

1. The **Details** view, select the cell containing the exception.
2. Click **Mark as Reviewed**.

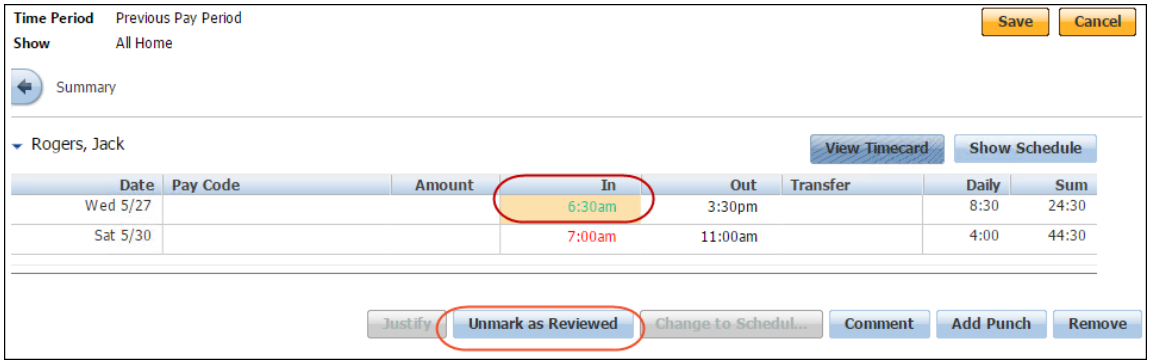
   The exception turns from red to green.



3. Click **Save**.

Unmarking Exceptions as Reviewed

1. In the **Details** view, select the cell containing the exception.
2. Click **Unmark as Reviewed**.
   The exception turns from green to red.



3. Click **Save**.

Tip

Add a comment to a resolved exception if you want to note additional information about the resolved exception.

Use HyperFind functionality to search for resolved exceptions and general exceptions.

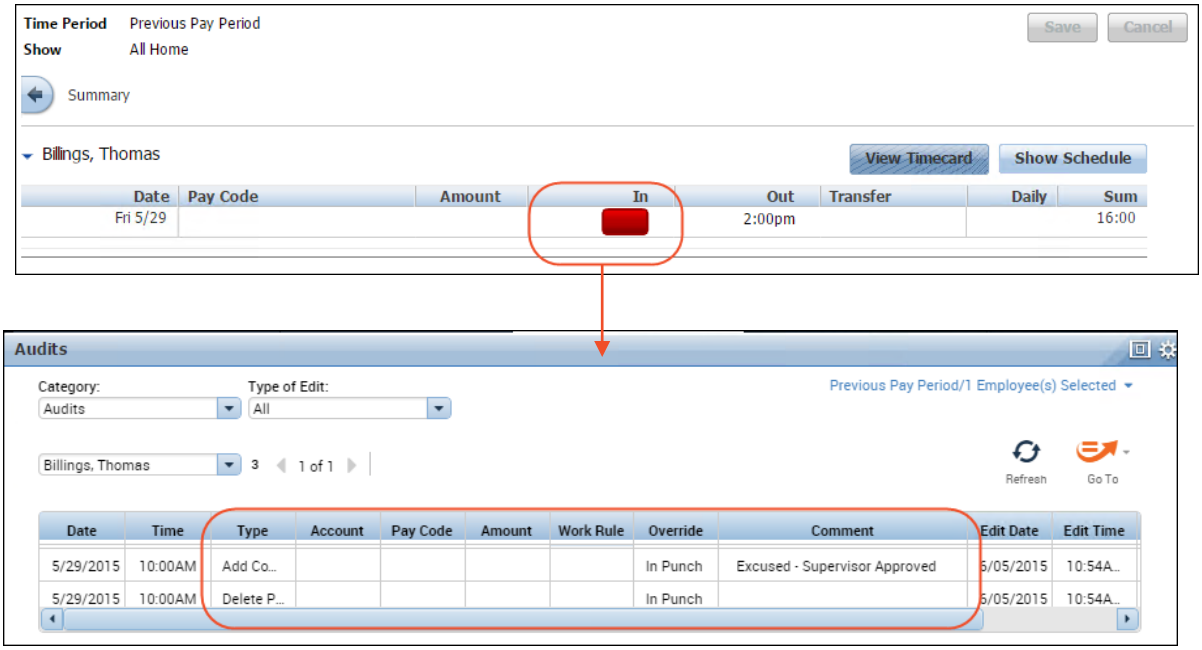
Removing a Punch

Many organizations discourage the modification of punches that originate from data collection sources, such as a Kronos 4500 device, because these punches reflect actual times an employee worked. However, there are exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. If this occurs, you can delete the double punch.

Removing a Punch

1. Access the **Time Data Exceptions** widget and select the applicable pay period.
2. Select the applicable employee and click **View Details**.
3. Click the applicable punch and click **Comment**.
4. Select the comment that represents the reason for the punch removal.
5. Click **OK**.

6. Click **Save**.
7. Click the applicable punch cell again and then click **Remove**.
8. Click **Save**.
9. To verify that this issue was resolved, navigate back to the **Summary** view of the **Time Data Exceptions** widget.
10. With the applicable employee selected, access **GoTo > Audits**.
11. Verify that the deleted punch and comment attached to the deleted punch appear within the grid.



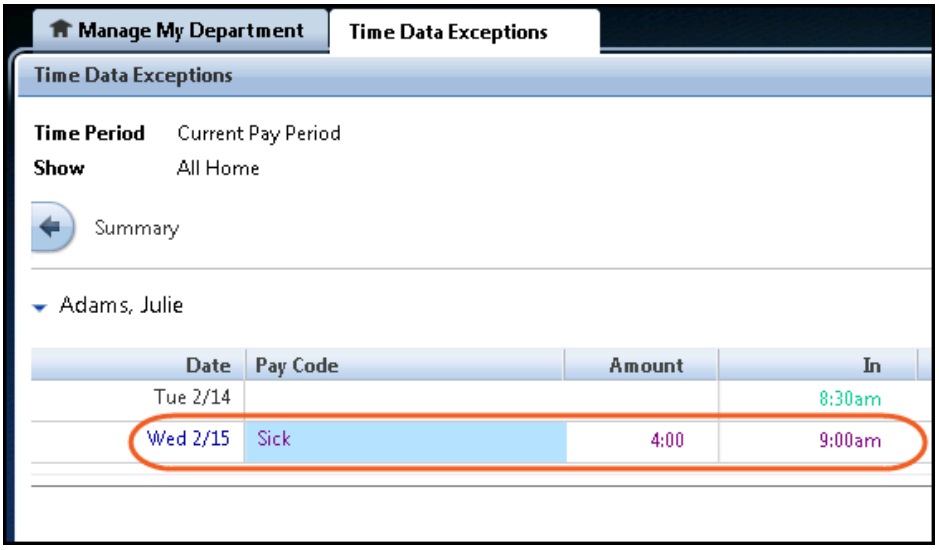
Recommended Practice

Before you remove a punch, attach and save a comment to it. You cannot add a comment to a punch after the punch is deleted. Adding a comment provides documentation about why you deleted the punch

Using Pay Codes to Track Non-Worked Time

Although employees are scheduled to work specific hours each week, inevitably events occur that cause employees to miss time. In addition, there may be circumstances when employee's need to be paid above and beyond their worked hours. For example, a bonus payout needs to be added to an employee's pay.

Pay codes facilitate payroll processing by grouping specific types of worked and non-worked hours and monetary amounts to accurately track time data.



Note

The application also supports the use of combined pay codes. Combined pay codes are totals of several pay codes and appear in the Totals tab of the timecard, or in a report.

For example, you might create a combined pay code named All Worked that is a sum of all worked pay codes.

Adding Non-worked Time

Most organizations have a variety of pay codes, such as holiday, vacation, and bereavement leave, which let employees track non-worked hours to an appropriate category.

1. In the **Details** view, hover your cursor over the **Pay Code** cell and click the **green plus** sign.
2. In the **Pay Code Edit** dialog box, select the appropriate pay code from the **Pay Code** drop-down list.
3. In the **Amount** field, enter the number of hours using an acceptable format, or select one of the scheduling amount options.
4. If necessary, modify the value in the **Start Time** field.
5. Click **OK**.
6. In the **Details** view, click **Save**.

Note

- Workforce Timekeeper converts entries to your organization's default time format.
- Pay codes that appear in the Pay Code drop-down list in a timecard are specific to the task of entering and editing employee time. Different pay codes might appear for selection when you generate a report or view data in a Workforce Genie.

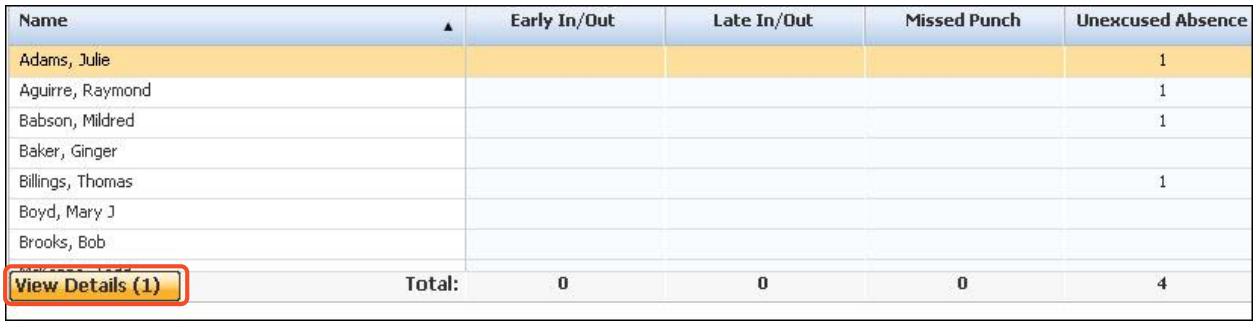
Accessing Hourly and Project Timecards

Workforce Central provides several methods for accessing hourly and project employee timecard data, including:

- Via the View Timecard link in the Exceptions widget Details view
- Using a Workforce Genie
- Using a GoTo Navigation link

Accessing Timecards via the View Timecard Link In the Exceptions Widget Details View

If an employee appears with an exception in the Exceptions widget Summary view, you can select the employee and click **View Details**.



Name	Early In/Out	Late In/Out	Missed Punch	Unexcused Absence
Adams, Julie				1
Aguirre, Raymond				1
Babson, Mildred				1
Baker, Ginger				
Billings, Thomas				1
Boyd, Mary J				
Brooks, Bob				
View Details (1) Total:	0	0	0	4

From the Details view, you can click View Timecard to access the employee's timecard.

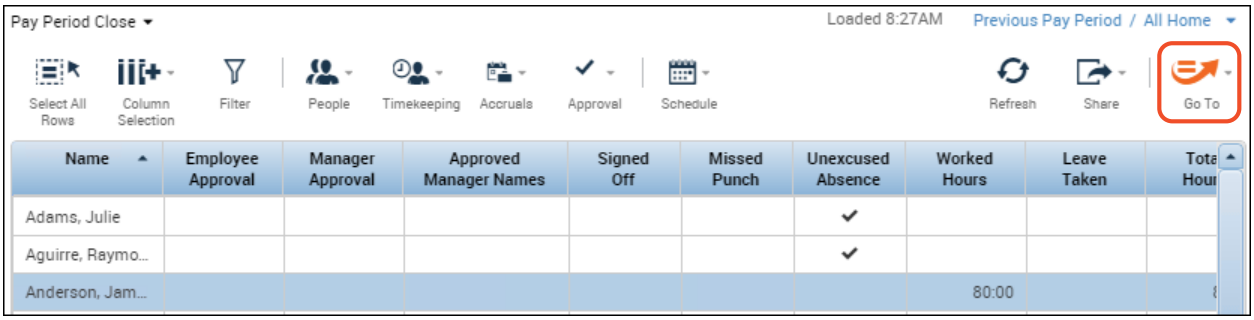
The employee's timecard appears. You can perform an action on the timecard, or close the timecards workspace to return to the Details view of the Exceptions widget.

Accessing Timecards via a Genie

You can access a timecard from a Genie by double-clicking the employee's name.

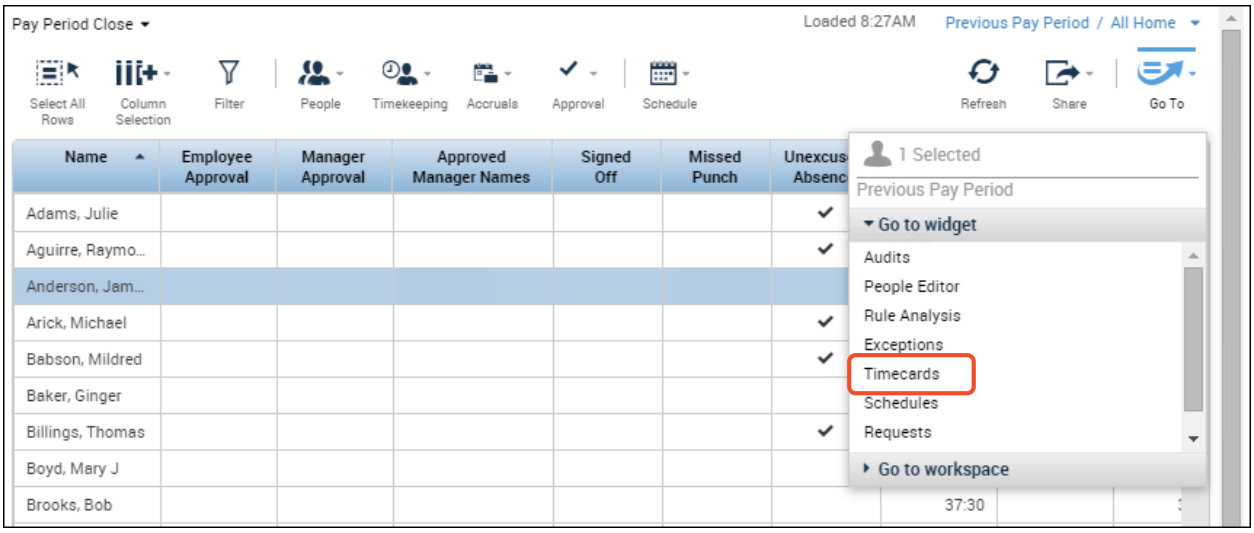
Accessing Timecards via GoTo Navigation

Depending on how your navigator is configured, you may have a GoTo Control icon in the upper-right corner of some widgets.



GoTo navigation is configurable, so it is possible to configure this control to provide a link directly to an employee timecard.

To access the timecard, you select one or more employees, click the GoTo control, and select the Employee Timecard link.



Analyzing and Resolving Exceptions in Hourly Timecards

Resolving Time Data discrepancies in the Hourly Timecard

The hourly timecard view allows you to perform additional tasks for hourly employees, beyond resolving time data exceptions. In this topic, we will review:

- Saving time data changes in the hourly timecard view
- Transferring employees

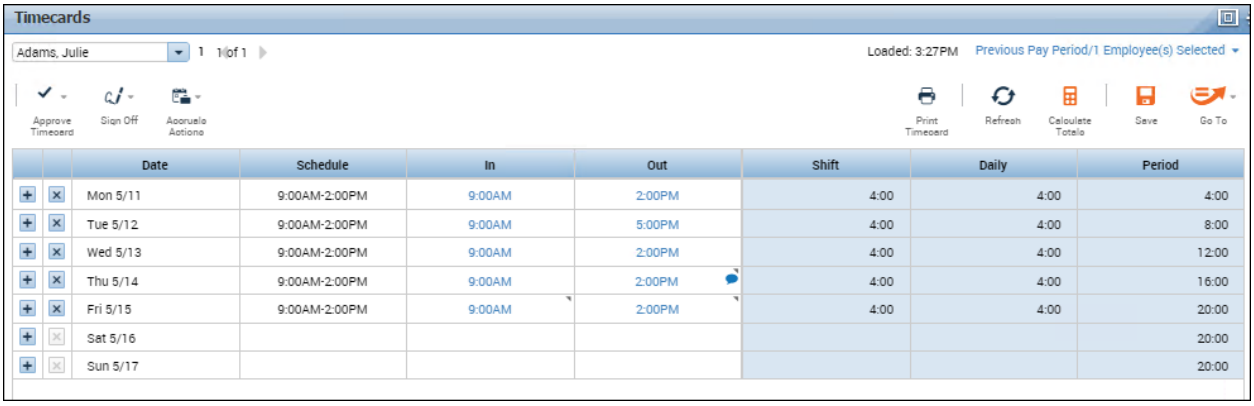
Note

When making employee timecard edits, your system administrator may have configured the system to restrict your choices to only those pay codes, work rules, job, codes, and labor accounts derived from the employee's assigned profile set. This restriction might be set, for example, to prevent inadvertently assigning a pay code or other item that is inappropriate to the employee in his or her timecard.

Saving Changes to Information in the Timecard View

Unsaved Data Indicators

Similar to the Exceptions widget, the hourly timecard view provides visual indicators to inform you when you have unsaved data. The Save icon turns orange when changes have been made to timecard information. If changes have been made that impact timecard totals, the Calculate Totals icon will also turn orange.



Saving Changes

After you complete you edits, you must click Save to write those edits to the database. When you do, the visual indicators will disappear.

Saving Changes within a Timecard

1. Complete your edits within the timecard.
2. If you decide you no longer want the edits to be made, click **Refresh**.
   The data will return to the state before edits were made.
3. To save your edits, click **Save**.
4. If your data is not updated, click **Refresh**.

Refreshing Workforce Timekeeper Data

Clicking Refresh cancels unsaved edits and displays data as of the last save.

- To discard any changes, after clicking Refresh, click Yes.
- If you click Refresh, but want to save the changes, click No and save the data.

Calculating Totals Before Saving Changes

In some cases, you may want to calculate the totals that were impacted by your edits before saving the data. To do this, perform these steps.

1. Complete the edits within the timecard.
2. Click **Calculate Totals**.
3. If you decide you do not want to save the edits after review the impacts, click **Refresh**.
4. If you decide to move forward with the edits, click **Save** and, if necessary, click **Refresh**.

Transferring Employees

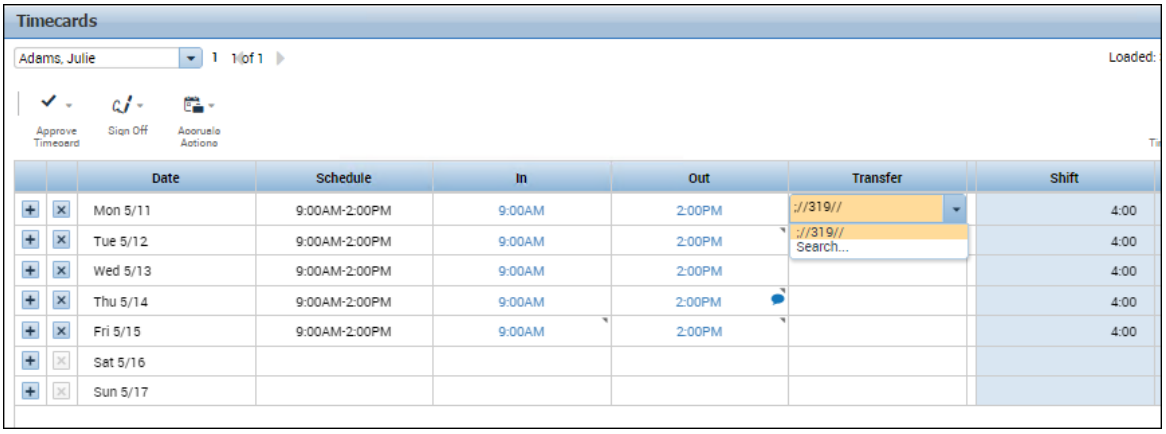
During the normal workday, all worked and non-worked hours are calculated using the employee's default work rule and charged to the employee's assigned labor account and job.

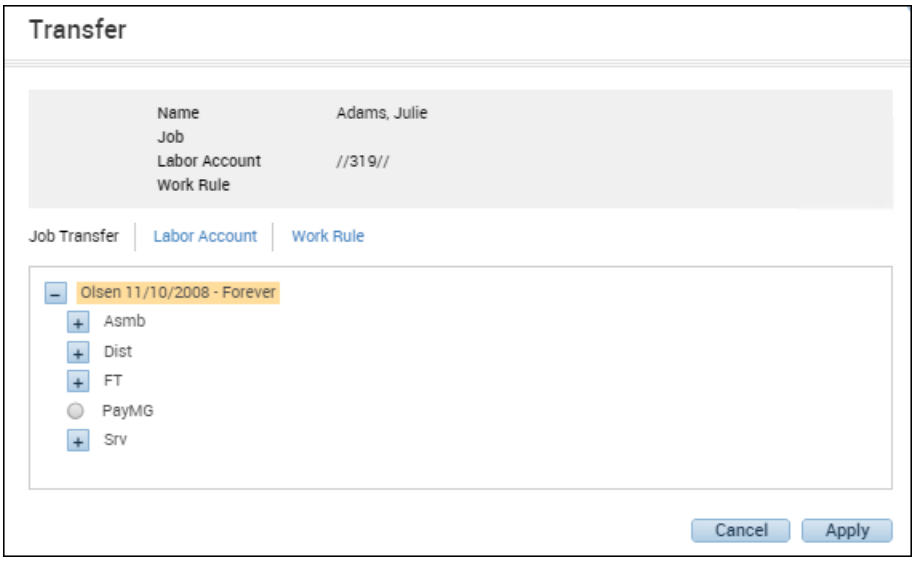
Employees are each assigned to a primary labor account, a default work rule, and possibly a primary job.

Employees are not limited to working where they have been assigned.

Using the Transfer Field

Use the Transfer field in the timecard to transfer employee's time to a new labor account, work rule, or job. Click Search to display the Select Transfer dialog box.





Transferring an Employee

1. Access a Genie and click **Refresh**.
2. Select an employee and access **GoTo > Timecards**.
3. Select a day you want to transfer hours to.
4. Click the **Transfer** cell in the row for the applicable date.
5. If the applicable job does not appear in the **Transfer** list, click **Search**.
6. In the **Job Transfer** tab of the **Transfer** dialog box, click **+** until you reach the applicable job.
7. Click **Apply**.
8. Click **Save**.

Using the Transfer Field

Use the Transfer field in the timecard to transfer employee's time to a new labor account, work rule, or job. Click Search to display the Select Transfer dialog box.

Note

- If employees regularly work in multiple location, they can be set up to automatically distribute their hours to multiple labor accounts, pay codes, and/or organizational jobs.
- In addition to searching for transfers, a short list of transfers can be displayed. By default, the list displays a user's most recent transfers, known as the Most Recent Used (MRU) list. However, some organizations can choose to limit the labor accounts and work rules that employees can transfer to. The MRU list can be replaced with an Easy Transfer list. To learn more about Easy Transfers, access content on KnowledgePass.

Reviewing and Submitting Timecards

Approving Employee Timecards

Approving Employee Timecards

You need to validate that all employee timecards are ready for payroll processing and that your employees have applied their approvals. After the timecards are validated, you can apply your approval and check the results. If the approval is successful, Payroll personnel can then start preparing time data for payroll processing.

Approval Effects on Editing Capabilities for Managers

After a manager applies an approval to a specified time period for an employee, the ability of the manager to perform further edits depends on his or her access rights.

Check with your Workforce Timekeeper Application Administrator to determine whether you can edit employee timecards that you or another manager has approved.

Visual Indicators of Timecard Approval Status

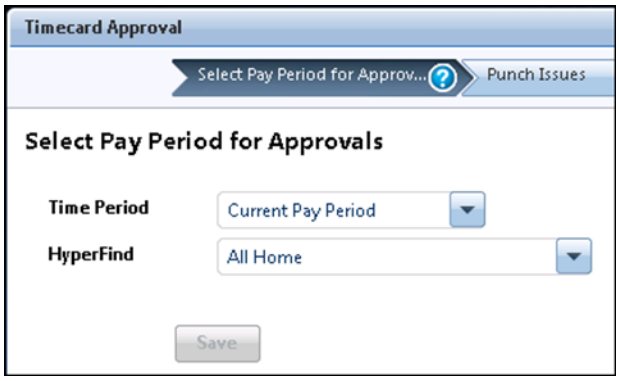
Workforce Timekeeper provides visual cues within employee timecards that represent approval statuses. The timecard is shaded various colors depending on where the timecard is within the approval process.

The following table identifies the various timecard shading colors and what they signify.

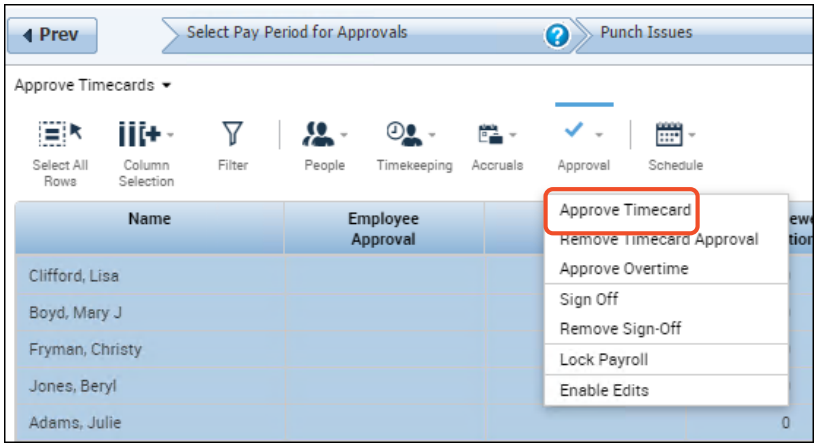
Timecard color	Status of timecard
Orange	Timecard has been approved by the employee only
Yellow	Timecard has been approved by the manager only
Green	Timecard has been approved by both employee and manager
Grey	Timecard has been signed off by either the employee, manager, or both

Approving Employee Timecards Using the Approval Wizard

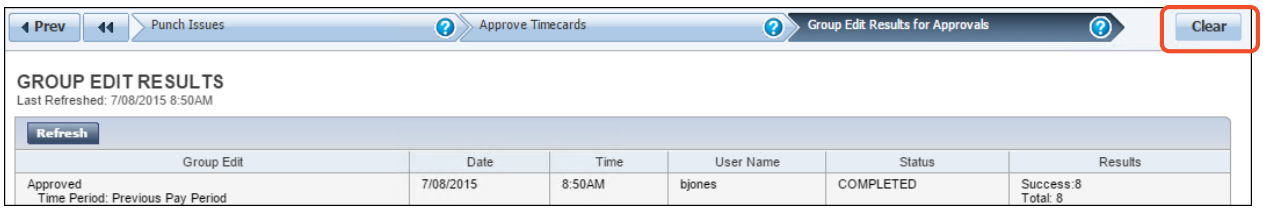
1. Access the **Timecard Approval** wizard.
2. Confirm or modify the values in the **Time Period** and **HyperFind** field. If you make any changes, click **Save**.



3. Click **Next**.
4. Review the **Exceptions** widget for any exceptions that have not been addressed. Correct the exceptions as necessary. Click **Next**.
5. Select one or more employees whose timecards you want to approve. Hint: If you are not viewing the applicable Genie, select the applicable Genie from the drop-down list.
6. Select **Approval > Approve Timecard**.



7. Click **Yes** on the pop-up message. Then click **Next**.
8. Review the results of your time approvals. To start a new timecard approval, click **Clear**.



9. Click **OK** on the pop-up message.

Removing your Approval

After you apply an approval to one or more employee timecards, those employees can no longer edit their timecards for that time period. However, there might be circumstances when an employee needs to make further edits to a timecard after a manager has applied an approval.

Removing your approval from a timecard allows other managers—and possibly the employee—to edit time data for the dates from which you removed your approval.

If your organization chooses to implement this feature, you will be able to remove and re-apply approval as needed.

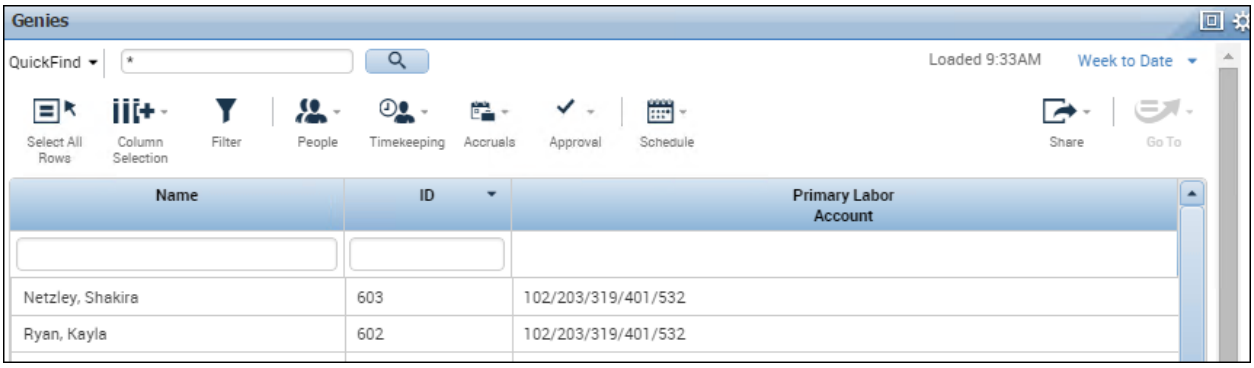
Appendix

Using the Workforce Timekeeper Interface

Basic Navigation

Searching for Employees Using the QuickFind Genie

The QuickFind Genie is a convenient tool you can use to search for a person or a set of people in the application.



You can use the following methods to search for employees:

Search by employee's last name

Search by name or ID

Search by partial name or ID

You can also change the list of people that appear by selecting a different period from the Time period drop-down list.

Searching by Employee's Last Name

1. In the **Name or ID** field, enter the employee's last name and click **Find**.
    - For example, enter **Babson** and click **Find**.
    - **QuickFind** returns the list of all employees whose names begin with the letters Babson.

Searching by Name or ID

1. In the **Name or ID** field, enter the employee's ID number and click **Find**.
    - For example, enter 601 and click **Find**.
    - **QuickFind** returns the person with ID 601.

Searching by Partial Name

If the employee you are looking for has a long name, or if you are unsure how to spell it, you can use the asterisk (*) wild card character, which allows you to search using just the first letter or first few letters of the employee's name.

1. In the Name or ID field, enter the first few letters of the employee's name, followed by an asterisk (*), and click Find.
    - For example, type **ca*** and click **Find**.
    - QuickFind returns the list of all employees whose names begin with Ca.
        - Note that you can use the wild card character in the middle of a name. For example, if you don't know whether an employee's name is MacDonald or McDonald, you can enter M*Donald, and QuickFind will return all employees whose names begin with M and end with Donald.

Searching by partial number or ID

You can also search by partial ID by entering the first number or first few numbers, followed by the * character in the Name or ID field. QuickFind returns all employees whose IDs begin with those numbers.