Time & Attendance
for ADP Workforce Now®
Module 1: Maintaining Timecards

Automatic Data Processing, LLC.
ES Canada
Module 1: Introduction

Purpose

This module will demonstrate the tasks associated with maintaining timecards.

Objectives

After Completing this module, you will be able to:

• Identify The Time & Attendance Cycle
• Edit Individual Timecards
• Create Schedule Templates
• Fix Exceptions
Module 1: Introduction

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This module will demonstrate the tasks associated with maintaining timecards.

Objectives
After Completing this module, you will be able to:

- Identify The Time & Attendance Process Flow
- Edit Individual Timecards
- Create Schedule Templates
- Fix Exceptions
The Time & Attendance Process Flow

Overview

*Review the slide contents and refer participants to the handout manual.*

Stage and Description

*Say:* Let’s look at the stages involved in this process.
Review the information on the next seven slides. Read the description for each stage in the handout manual as you display each slide.

Poll

*How will your employees enter time?*
Take a moment to answer this question.

*Show results.*
As you can see, your employees enter their time and attendance data into ADP Workforce Now® in different ways. Next, we’re going to review some of the ways you can fix time-entry errors.
The Time & Attendance Process Flow

Overview

Time & Attendance simplifies the job of collecting your employees’ time and attendance information and moving it quickly and accurately through the payroll process. The following illustration shows each stage of this process.

Stages and Description

The following table describes the stages of this process.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>After the new payroll cycle starts, employees enter their time data in Time &amp; Attendance, and punches are collected for those employees using a timeclock. The application applies rules, calculates total hours, and highlights missed punches and other exceptions as per client requirements.</td>
</tr>
<tr>
<td>2</td>
<td>Time &amp; Attendance supervisors review and edit the data as needed and generate reports to verify totals.</td>
</tr>
<tr>
<td>3</td>
<td>At stage three we can envision that it is payroll day. The Time Practitioner checks to ensure the data is ready, locks the current pay period (so no further edits can be made), and exports the data to the payroll module of ADP Workforce Now.</td>
</tr>
<tr>
<td>4</td>
<td>The Payroll Practitioner receives the Time and Attendance data, enters other payroll entries as needed, verifies the payroll, and transmits the payroll to ADP for processing.</td>
</tr>
<tr>
<td>5</td>
<td>ADP processes the payroll and provides an output package to the Payroll Practitioner for verification. This output package may contain reports, pay statements, cheques and vouchers.</td>
</tr>
<tr>
<td>6</td>
<td>Once the Payroll Practitioner has verified the output package, they can start a new pay cycle in the payroll module.</td>
</tr>
<tr>
<td>7</td>
<td>The Time and Attendance Practitioner may now move to the next pay period in Time and Attendance.</td>
</tr>
</tbody>
</table>
Editing Individual Timecards

Overview

Review the slide contents and refer participants to the handout manual.

Say: One important Supervisor task is to review and handle timecard exceptions on a daily basis.

What Are Timecard Exceptions?

Say: You may have heard the term “time pair.” A time pair represents a set of in and out times. Every “in” time on a timecard must have a corresponding “out” time. An error is generated if one of the times is missing. This demonstration shows how to correct a missing time pair or called Transaction Details.

Exceptions are a way of notifying you and the Supervisor that time pair entries require user intervention before they can be processed.

Examples

Review the slide contents and refer participants to the handout manual.
Editing Individual Timecards

Overview

Let’s assume that it is the end of the pay period and employees have entered their time data for the week. One important Supervisor task is to review and handle Timecard exceptions on a daily basis.

What Are Timecard Exceptions?

A Timecard exception is generated when you attempt to process a time pair that does not meet certain expectations or requirements. Exceptions are a way of notifying you that timecard entries require user intervention before they can be processed.

Not all exceptions are generated by timecard errors. Some exceptions are triggered by application rules set up during implementation.

Examples

- The timecard is missing hours.
- The timecard is missing an in or out time.
- The employee has clocked out early or late.
- The number of hours in the schedule does not match the number of hours worked.
- The timecard is missing supervisor approval.
Explore: Using Individual Timecards

The Individual Timecard Page

Say: When you want to view and edit an employee's timecard, you use the Individual Timecards page. Let’s access that page.

As you can see, I’m already logged in to ADP Workforce Now.

Select People > Time & Attendance > Individual Timecards.
Explore: Using Individual Timecard

The Individual Timecard Page

Elements and Descriptions

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pay Date Range fields</td>
</tr>
<tr>
<td>2</td>
<td>Magnifying glass icon</td>
</tr>
<tr>
<td>3</td>
<td>Entry fields</td>
</tr>
<tr>
<td>4</td>
<td>Quick View Links</td>
</tr>
</tbody>
</table>

Important Information

You can apply a filter to control which employees display in the Employee Search list, such as only those employees who track time. Doing so can make it easier for you to edit timecards.
Elements and Descriptions

Point to each element in the application as you describe its functionality. Have participants take notes in the handout manual. Remind participants that the online Help describes these (and other page elements) in more detail.

You may change the dates displayed by selecting an option in the list or by using the Calendar icons to choose a specific date range.

Say: Most often you will be working in the current or next pay period.

Pay code:
Normally you would leave it blank because your application is configured with your pay polices and rules. Based on that information the system will handle the calculation of hours and which earnings codes they are allocated to.

If you need to override what the system is calculating, you may specify a pay code here.

Select a Pay Period from the list

Point out the available options:
- ☐ Current Pay Period
- ☐ Next Pay Period
- ☐ Previous Pay Period
- ☐ Range of Dates

Say: To locate an employee's timecard, you can click the Next button (the right arrow), or click the magnifying glass icon on the Employee ID bar and select the employee from the list.

Say: Your handout manual contains a list of all the key elements on this page. You can refer to this information back on the job.

Let’s locate Heidi Condo's timecard.

In the Employee ID bar, click the magnifying glass icon.
Select Condo, Heidi.

Now we’re ready to edit Heidi's timecard.

Important Information

Say: Review the information in the handout manual.

Background Information: By default, all employees that a practitioner has rights to access display in the Employee Search list, regardless of whether they track time or not. Additionally, blank timecards display for employees who do not track time. If practitioners want to limit the employees that display in the list, they can create an employee list to display only those employees who track time.
# Elements and Descriptions

<table>
<thead>
<tr>
<th>Time &amp; Attendance Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timecard Tab</td>
<td>Review, edit, and approve individual employee timecards and handle exceptions. The Individual Timecard combines employees with exceptions and exceptions by type on a single grid.</td>
</tr>
<tr>
<td></td>
<td>- Timecard information is totaled by week and pay period with the option to display the hours in a daily or cumulative view.</td>
</tr>
<tr>
<td></td>
<td>- Tabs to access totals, time off balances, and schedules.</td>
</tr>
<tr>
<td></td>
<td>- Timecard and row menus to complete tasks</td>
</tr>
<tr>
<td>Totals Tab</td>
<td>Displays employee totals for the time period by pay code or by week. The default view is Display Totals by Pay Code. You can point to a pay code to view the pay code and pay code description. Rate masking (XXXXX) is applied to dollars.</td>
</tr>
<tr>
<td>Schedule Tab</td>
<td>If schedules are enabled for your company, you can click the Schedule tab to view the employee's schedule displayed in blue below the employee's In – Out times. This allows you to compare the worked time to the scheduled time. The schedules display in blue and are read-only.</td>
</tr>
<tr>
<td></td>
<td>You can edit timecard transactions from the Schedules page.</td>
</tr>
<tr>
<td>Supplemental Earnings Tab</td>
<td>Shows the supplemental pay sources and their corresponding codes</td>
</tr>
<tr>
<td>Time Off Balances</td>
<td>Shows the available balance for each time off policy defined</td>
</tr>
<tr>
<td>Preferences</td>
<td>Allows you to specify how the Individual Timecard is displayed</td>
</tr>
<tr>
<td>Legend</td>
<td>Shows the visual indicators and their associated meanings:</td>
</tr>
</tbody>
</table>

![Legend Image](image-url)
Advanced Searching

Review the slide contents and refer participants to the handout manual.

Time & Attendance Search Fields

**Say:** Let’s look at the Search Fields for Time & Attendance. In addition to a basic search, there are more advanced options for filtering and searching. Review the next slide and show the search techniques with Time & Attendance fields. **Say:** Now that you’ve seen how data flows through Time & Attendance and into Payroll, and the Time & Attendance search fields, let’s get started with editing Individual timecards.
Advanced Searching

In addition to a basic search, there are more advanced options for filtering and searching employees in ADP Workforce Now.

### Time & Attendance specific Search Fields

The following table describes the Time & Attendance Search Fields.

<table>
<thead>
<tr>
<th>Time &amp; Attendance Search Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Class – Time &amp; Attendance</td>
<td>Allows you to search for employees based on their Time and Attendance Pay Class.</td>
</tr>
<tr>
<td>Time &amp; Attendance Supervisor</td>
<td>Allows you to search for employees based on their Time &amp; Attendance Supervisor.</td>
</tr>
</tbody>
</table>

### Adding Search Fields

You can add other Time & Attendance fields to the employee Search Options page by clicking on “Edit Search Fields” and selecting the fields you wish to add. All of the Time & Attendance specific fields contain the words Time & Attendance so you can easily identify them.
Demonstration: Adding Missed Punches to Correct a Time Pair Error

Say: I will now demonstrate how to add missed punches to correct a time pair error. Upon completion of the demonstration you will have the opportunity to complete the exercise yourself. If you would like to follow along during the demonstration please refer to the activity located in the handout manual.

Scenario:

Say: On the first Tuesday Heidi Condo punched out for lunch at 12:15 p.m. but forgot to punch in when she returned. She left the office at 4:21 p.m. You need to correct the second time pair to reflect the return from lunch and her end-of-day out punch.

Activity: Adding Missed Punches to Correct a Time Pair Error

Guide the class through the activity.

Say: What are some observations you can make about Heidi’s timecard?

Point out the processing symbols under Legends.
Here you see several processing symbols indicating timecard errors or warnings that other actions are needed.

What are some observations you can make about the Daily Totals column?

Answer: The Daily Totals column displays a daily total for each day on the timecard. Since we have multiple rows for a single day, the total hours for the full day display in the last row in the Daily Totals column. As we make revisions, you will notice changes to the Daily Totals column on those days.

Why do you think there’s a time in red with a question mark?

Answer: If the day has an error, such as a missing punch, the daily total displays in red with a question mark and you’ll see the processing symbol of a red octagon (stop sign) with a line through the middle. You must fix the errors indicated with this processing symbol before you can process a payroll.

We're going to correct the missing time pair for the first Tuesday.

Right-clicking in the field brings up a menu that allows us to quickly insert a new time.

In the Time In field, right-click 4:21 PM and select Insert Time.

What happened when I clicked Insert Time?

Answer: The 4:21 p.m. punch automatically moved over to the Time Out field in the same row.

Now let's enter Heidi's correct time in.

In the Time In field, type 2p and press tab.

Rounding and other rules are not applied until the timecard is processed.

We still have to make other changes to Heidi's timecard, so I'll continue with the next few tasks before clicking Save.
Demonstration: Adding Missed Punches to Correct a Time Pair Error

We will now demonstrate how to add missed punches to correct a time pair error.

Scenario

On the first Tuesday Heidi Condo punched out for lunch at 12:15 p.m. but forgot to punch in when she returned. She left the office at 4:21 p.m. You need to correct the second time pair to reflect the return from lunch and her end-of-day out punch.

Activity: Adding Missed Punches to Correct a Time Pair Error

Starting point: People > Time & Attendance > Individual Timecard.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | If the desired employee timecard does not display, in the Employee ID bar, click the magnifying glass icon. Enter the employee's name in the search field, and then select the employee from the list.  
**Result:** The timecard displays for the employee you have selected. |
| 2    | In the row with the missing punch, in the Time In field, right-click 4:21 PM it and select Insert Time.  
**Result:** The time automatically moves over to the Time Out field in the same row. |
| 3    | In the Time in field enter the time the employee returned from lunch and press tab.  
**Note:** rounding and lunch rules are not applied to the daily total until the timecard is processed after an update. Processed items are indicated by a green check. |
| 4    | If necessary, make any other edits to the employee's timecard and then click the appropriate button to save your changes. |

<table>
<thead>
<tr>
<th>If you want</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>To be able to move to a different timecard while your entries are being processed and your entries to be fully processed and the totals updated immediately.</td>
<td>Click Save</td>
</tr>
</tbody>
</table>
Demonstration: Adding Missed Time Out and Time In Punches

*Say:* I will now demonstrate how to add missed time out and time in punches. Upon completion of the demonstration you will have the opportunity to compete the exercise yourself. If you would like to follow along during the demonstration please refer to the activity located in the handout manual.

Scenario

*Say:* On Wednesday of the first week, Heidi Condo forgot to punch out for lunch at 12:45 p.m. She also forgot to punch back in when she returned from lunch and out when she left at the end of the day.

*Ask:* Do you think that you can make these entries in one row?

*Answer:* No, we'll need to insert a second row to enter the time pair for the “in from lunch” and “out for the day” punches.

Activity: Adding Missed Time Out and Time In Punches

*Guide the class through the activity*

*Say:* Locate the row for Wednesday of the first week.

- In the Time Out field, type **1245p**.
- Click the Timecard icon, and select Add Blank Row

Notice that the system inserted a duplicate row for that day. The system default assumes AM time so you don’t need to enter the “a”; however, you do have to enter a “p” for PM. You don’t need to enter colons or zeroes.

- Heidi returned from lunch at 1:45 p.m.
- In the new row, in the Time In field, type **145p** and press tab.

- She went home at 6:00 p.m.
- In the Time Out field, type **6p** and press tab.

Before we save our changes, let’s move on to the next scenario for Heidi.
Demonstration: Adding Missed Time Out and Time In Punches

We will now demonstrate adding missed time out and time in punches.

Scenario

On Wednesday of the first week, Heidi Condo forgot to punch out for lunch at 12:45 p.m. She also forgot to punch back in when she returned from lunch and out when she left at the end of the day.

You need to add the missed punches to reflect the punch out and in from lunch and her end-of-day punch out.

Activity: Adding Missed Time Out and Time In Punches

Starting Point: this activity carries on from the previous exercise

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Locate the row for Wednesday of the first week.</td>
</tr>
<tr>
<td>2</td>
<td>In the Time Out field, type 1245p.</td>
</tr>
<tr>
<td>3</td>
<td>In that same row, click the Timecard icon, and select Add Blank Row. Result: A duplicate row is inserted for that day.</td>
</tr>
<tr>
<td>4</td>
<td>In the new row, in the Time In field, type 145p and press tab.</td>
</tr>
<tr>
<td>5</td>
<td>In the Time Out field, type 6p and press tab.</td>
</tr>
</tbody>
</table>
Demonstration: Deleting Punches

**Say:** I will now demonstrate how to delete punches. Upon completion of the demonstration you will have the opportunity to complete the exercise yourself. If you would like to follow along during the demonstration please refer to the activity located in the handout manual.

Scenario

**Say:** On the second Monday of the pay period, Heidi Condo punched out for the day but, as she was leaving, a coworker asked her for help. She stayed to assist on a project and then punched out again when she left. This punch created a new row with just the punch out time, generating a missing out-punch exception. This demonstration shows how to delete the incorrect out punch.

Activity: Deleting Punches

**Guide the class through the activity**

**Say:**

Let's look for the second Monday. We can again use the right-click menu to easily delete the 3:47pm punch.

- **Locate the row for the second Monday.**
- **Right-click 3:47 PM** and select **Delete Time.**

The 3:47pm punch is replaced by the 4:30pm punch, and the extra row will be deleted when we save our changes.

- **Click Save.**

The “Operation Successful” message displays on the page. The extra row was deleted and the rows we updated.

Next, you're going to practice what you just learned.
### Demonstration: Deleting Punches

We will now demonstrate how to delete punches.

### Scenario

On the second Monday of the pay period, Heidi Condo punched out for the day but, as she was leaving, a coworker asked her for help. She stayed to assist on a project and then punched out again when she left. This punch created a new row with just the punch out time, generating a missing out-punch exception. This demonstration shows how to delete the incorrect out punch.

### Activity: Deleting Punches

Starting Point: People > Time & Attendance > Individual Timecards.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Locate the row for the second Monday.</td>
</tr>
</tbody>
</table>
| 2    | Right-click the punch 3:47 PM and select **Delete Time**.  
**Result:** The 3:47pm punch is replaced by the 4:30pm punch, and the extra row will be deleted when we save our changes. |
| 3    | Click **Save**. |
Demonstration: Editing Non-worked Time for Hours-Based Employees

*Say:* I will now demonstrate how to edit non-worked time for hours-based employees.

*Scenario*

*Say:* Todd Anderson enters his total hours per day but entered the incorrect number of hours on the first Monday in the pay period. Todd entered seven hours instead of the eight hours he actually worked.

*On Friday, he also forgot to record 4 hours he took off.*

*Activity: Editing Non-worked Time for Hours-Based Employees*

*Say:* Navigate to Todd's timecard using the same process we followed to find Heidi's timecard.

**Click the Employee List icon, type Anderson, and then select Anderson, Todd.**

Unlike Heidi's, Todd's timecard does not include the Time In and Time Out columns, indicating he is an hours-based employee. Let's begin by correcting Todd's hours on the first Monday.

**In the row for the first Monday, in the Hours field, replace 7 with 8.**

*On Friday, Todd worked four hours in the morning and then took four hours off. First, let’s enter the four hours that Todd worked.*

**In the row for the first Friday, type 4.**

*How would you account for Todd's hours that he took off?*

**Answer:** Click the Timecard icon, and select *Add Blank Row.*

**In the row for the first Friday, click the Timecard icon, and select *Add Blank Row.***

*Notice that the hours in the new row default to four hours.*

*Where would you indicate the 4 hours he took off?*

**Answer:** In the Pay Code field.

**Click in the Pay Code field twice to display a list of pay codes.**

**Click Personal.**

*Next, I’ll enter a note to show that Todd went home in the afternoon.*

*Point out the note in step 6 regarding the ability of employees to view notes.*

*How would you enter a note on a timecard?*

**Answer:** Click the Note icon.

**Click the Timecard icon and Add Note.**

*In the Note window, write that Todd took half a day off using his personal hours. Click Ok.*

*Point out the appearance of the Note icon and how it changed when you clicked Ok.*

**Click Save.**
## Demonstration: Editing Non-worked Time for Hours-Based Employees

We will now demonstrate how to edit non-work time for hours based employees.

## Scenario

Todd Anderson enters his total hours per day but entered the incorrect number of hours on the first Monday in the pay period. Todd entered seven hours instead of the eight hours he actually worked.

On Friday, he also forgot to record 4 hours he took off.

## Activity: Editing Non-worked Time for Hours-Based Employees

**Starting Point:** People > Time & Attendance > Individual Timecards.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigate to the employee’s timecard.</td>
</tr>
</tbody>
</table>
| 2    | In the timecard, correct the number of hours worked. Replace 7 with 8. **If you need to edit**  
  **Then**  
  The total number of hours worked  
  • In the row with the incorrect number of hours, in the Hours field, enter the correct number of hours.  
  • Proceed to Step 8.  
  The number of hours because the employee worked part of the day  
  • In the row for the day that has the incorrect hours, in the Hours field, enter the correct number of hours that the employee worked.  
  • Proceed to Step 3. |
| 3    | Add a row by clicking the Timecard icon, and select Add Blank Row and type 4. |
| 4    | In that same row, to display the magnifying glass icon, click in the Pay Code field. |
| 5    | Click the magnifying glass icon and then click the appropriate earnings code. Select Personal |
| 6    | Click the Timecard icon, and Add Note and, in the Note window, enter your note. **Result:** The employee will be able to view the contents of the note if they are able to view their timecard in ADP Workforce Now. |
| 7    | Click Ok. **Result:** The row where you added the note has a yellow icon. |
| 8    | Click Save. |
Demonstration: Editing Non-worked Time for Time-Based Employees

_Say_: I will now demonstrate how to edit non-worked time for time-based employees. Upon completion of the demonstration you will have the opportunity to compete the exercise yourself. If you would like to follow along during the demonstration please refer to the activity located in the handout manual.

We’ll navigate back to Heidi Condo’s timecard.

Navigate to Heidi Condo’s timecard.

Scenario

_Say_: On the first Friday of the pay period, Heidi took the day off, but did not record it. This demonstration shows how to account for that day off.

Activity:

Guide the class through the activity.

_Say_: The best practice for adding non-worked time is to enter a start time and the total number of hours. This will ensure that the employee’s non-worked time is calculated accurately based on your entry. For example, some companies are set up with automatic lunch deductions and rounding rules on time pairs. You can ensure a correct total by entering the start time, the number of hours in the Hours field, and selecting the appropriate pay code.

In the row for the first Friday, enter a start time of **8:30 am**, and in the Hours field, enter **7**.

In the Pay Code field, select **Personal**.

Let’s enter a note.

Click the Timecard icon and add note.

In the Note window, write that Heidi took the day off from her personal hours.

Click **Ok**.

Click **Save**.

Notice that the time pair was generated automatically for the first 7 hours of the day and 7 hours have been entered as non-worked hours.

_Note_: Non-worked hours are not subject to rounding or lunch deductions.
**Demonstration: Editing Non-worked Time for Time-Based Employees**

We will now demonstrate the process of editing non-worked time for time-based employees.

**Scenario:**

On the first Friday of the pay period, Heidi Condo took the day off, but did not record it.

**Activity: Editing Non-worked Time for Time-Based Employees**

Starting Point: People > Time & Attendance > Individual Timecards.

<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>1</td>
<td>Navigate to the employee’s timecard.</td>
</tr>
<tr>
<td>2</td>
<td>In the row for the first Friday, enter a start time of 8:30 am</td>
</tr>
<tr>
<td>3</td>
<td>In the Hours field, enter 7</td>
</tr>
<tr>
<td>4</td>
<td>Double click on the Pay Code field to display the list of earnings codes or use the magnifying glass and select Personal.</td>
</tr>
<tr>
<td>5</td>
<td>Click the Timecard icon, and Add Note and, in the Note window, enter your notes. <strong>Result:</strong> The employee will be able to view the contents of the note if they are able to view their timecard in ADP Workforce Now.</td>
</tr>
<tr>
<td>6</td>
<td>Click Ok. <strong>Result:</strong> The row where you added the note has a yellow icon.</td>
</tr>
<tr>
<td>7</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>
Demonstration: Correcting Department Transfers for Hours-Based Employees

Say: At times, employees’ hours may be charged to a department other than their home department. When an employee works for multiple departments, a department transfer is necessary. You’ll need to update the employee’s timecard to reflect the appropriate amount of time assigned to the applicable department.

I will now demonstrate how correct department transfers. Upon completion of the demonstration you will have the opportunity to compete the exercise yourself. If you would like to follow along during the demonstration please refer to the activity located in the handout manual.

Scenario:

Say: On the first Tuesday, Todd Anderson worked in the Customer Service department for four hours. Let’s assign those hours to the correct department.

Activity: Correcting Department Transfers for Hours-Based Employees

Guide the class through the activity.

Say:
Let's record the four hours that he worked in the Customer Service department on Tuesday.
We’ll need to add a second row so that we can assign four hours to his home department and four hours to the Customer department.

How do we add that second row for that day?

In the row for the first Tuesday, click the Timecard icon, and select Add Blank Row.

In the first row, type 4 hours.
In the second row, type 4 hours.
Click in the Department field.
Click the magnifying glass icon and then click 310000.
Click Save.
Demonstration: Correcting Department Transfers for Hours-Based Employees

We will now demonstrate how to correct department transfers.

Scenario:

On the first Tuesday, Todd Anderson worked in the Customer Service department for four hours. Let's assign those hours to the correct department.

Activity: Correcting Department Transfers for Hours-Based Employees

Starting Point: People > Time & Attendance > Individual Timecards

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<tbody>
<tr>
<td>1</td>
<td>Navigate to the employee's timecard.</td>
</tr>
<tr>
<td>2</td>
<td>In the row for the first Tuesday, click the Timecard icon, and select Add Blank Row.</td>
</tr>
<tr>
<td>3</td>
<td>In the first row, type 4 hours.</td>
</tr>
<tr>
<td>4</td>
<td>In the second row, type 4 hours.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If the transfer is a:</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full work day</td>
<td>In the Hours field for the work day, enter the total hours.</td>
</tr>
<tr>
<td>Partial work day</td>
<td>1. To add another row, in the Hours field for the work day, click the Timecard icon, and select Add Blank Row. 2. Enter the hours worked for each department in the relevant rows.</td>
</tr>
</tbody>
</table>

| 3    | Click in the Department field. |
| 4    | Click the magnifying glass icon and then click the department code 310000 |
| 5    | Click Save. |
Scheduling Employees

Overview

*Say:* The employee-based schedule feature allows you to create, assign, and edit schedules to easily view the shifts that your employees work and to ensure that you have adequate coverage.

Review the slide contents and refer participants to the handout manual.

Types of Schedules

*Say:* You can work with two types of schedules: shifts and templates. Let's review the differences between these two schedule types.

Example of a Schedule Shift

Review the information in the handout manual.

Example of a Schedule Template

Review the information in the handout manual.

Important Information

Review the information in the handout manual.
Scheduling Employees

Overview
A schedule contains information about a typical workday for an employee. A schedule could include details such as start and stop times, the time allocated for lunch, and pay codes. Schedules can include NON-worked time.

Types of Schedules
You can create and manage schedules in two ways:

- Shifts—Used to create, edit, or delete a schedule for one or more employees for specific days.
- Templates—Used to create and assign a repeatable schedule to one or more employees for multiple days. Templates are comprised of one or more shifts. When you point to the shift in the schedule grid, the schedule template's name is displayed.

Example of a Schedule Shift
Roberta Brown is assigned a morning shift of 7:00 a.m. to 3:00 p.m. Since she is scheduled to attend a training session from 9:00 a.m. to 5:00 p.m. on Wednesday, she will be assigned a daily schedule for that day.

Example of a Schedule Template
Bruce Adler will work from 8:30 a.m. to 4:30 p.m. Monday through Friday. Bruce's practitioner will create the 8:30 a.m. to 4:30 p.m. schedule template, and his supervisor will assign the schedule to him.

Important Information
A supervisor’s ability to create, edit, and delete schedule templates depends on the access permissions granted by your company. A supervisor's ability to assign templates and modify shifts is also dependent on the access permissions. It is possible that a user can be setup with just read-only access to the Schedules page.
Explore: The Schedules Page

When you want to create, view, edit, or assign a schedule, you use the Schedules page. When you first access that page, you will see the default view. Let's access that page.

Select People > Time & Attendance > Schedules.

This is the landing or default view of the Schedules page. Let's look at some key elements on this page.

Elements and Descriptions

Refer participants to the handout manual as you point to elements on the screen.

Point to (filter).

The schedule filter allows you to reduce the number of employees that is displayed in a schedule grid by grouping them by specific schedule elements such as certain start or end times, worked or nonworked hours, lunch plans, and so on.

Point to the Template link.

Clicking the Template link enables you to create a schedule for one or more employees that repeats on a regular basis.

Click the More link.

Clicking the More link allows you to access Quick Shifts, which are your commonly used shifts, the Preferences Page, and the Legend Page, which displays the various indicators that show in the Schedules grid.

Point to the Print icon.

Clicking the Print icon enables you to print your employees' schedules, based on the information and formatting as displayed in the Schedules grid.

Point to the Schedules grid. Hover the mouse over employees with assigned schedules.

The grid offers a detailed view of employees' schedules. You can perform many tasks directly in the grid.

Point to the Totals row.

The totals row is stationary and displays time frame totals and daily totals.

Click Show Employees.

The Show Employees filter can be set to display all employees in the grid, or by those that are scheduled or are unscheduled.

What is an example of an ongoing schedule that you use at your company? Send an example in the text chat.

Review a few examples.

Now that we've talked about some examples, from this page, what would you select to create an ongoing or repeatable schedule?

Answer: The Template link
### Explore: The Schedules Page

#### Elements and Descriptions

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Schedule filter)</td>
<td>When clicked, allows you to refine the group of employees to be displayed, based on schedule criteria.</td>
</tr>
<tr>
<td>Template link</td>
<td>Use to create, modify, or assign recurring or repeatable schedules.</td>
</tr>
<tr>
<td>More link</td>
<td>Displays additional scheduling options that will allow you to easily access Quick Shifts, Preferences, and the Legend.</td>
</tr>
<tr>
<td>Print icon</td>
<td>When clicked, allows you to print schedules for posting or distribution.</td>
</tr>
<tr>
<td>Schedules grid</td>
<td>Displays the details of employee schedules within the selected time frame. Allows users to complete many tasks directly in the grid.</td>
</tr>
<tr>
<td>Totals row</td>
<td>Displays the total hours for the time frame selected and daily totals. The plus icon on the Totals row can be clicked to see a total breakdown of Worked and Non-Worked Hours and Shifts.</td>
</tr>
<tr>
<td>Show Employees menu</td>
<td>Filters the employees displayed in the Schedules grid by Show all employees, Show employees with schedules, and Show unscheduled employees.</td>
</tr>
</tbody>
</table>
Demonstration: Creating a Schedule Template

Say: I will now demonstrate how to create a schedule template. Upon completion of the demonstration you will have the opportunity to complete the exercise yourself. If you would like to follow along during the demonstration please refer to the activity located in the handout manual.

Scenario:

Refer participants to the handout manual.

Instructions

Guide a participant through the steps in the handout manual to create a template.

Let's start by creating a repeating schedule. In addition to the starting point in the handout manual, there is a second point of entry: People->Time & Attendance->Schedule Templates Either will work, but we'll use the Template link from the Schedules page.

Click the Template link.

Notice that the Templates window has opened. Let's create a new template.

Click Create New.

In the Add New Template window, multiple fields display which allow us to enter template details. Fields with red asterisks are required. Let's fill them in now.

In the Name field, enter the name of the schedule, 6a-2p.

In the Description field, enter 6am-2pm, Mon-Fri.

Next, notice the Access field. If you select Private, only you can use the template. If you select Public, all supervisors and practitioners can use it.

In the Access field, select Public.

Let's select the date we want the schedule to be available.

In the This template will be available starting on field, select Monday of the current week.

Then we'll select the days of the week we wish to apply to the schedule.

Select Monday through Friday.

Next we'll add our shift details.

Click (add).

We'll enter our Start and End Times. You don't need to enter a colon or zeroes.

In the Start Time field, enter 6am.

In the End Time field, enter 2pm.

Point to Pay Code, Lunch Plan, and Department. Our schedule doesn't require this information, so let's finalize the template.

Click Save.

Click Save Template.

Making Changes to Templates: Refer participants to the handout manual.
Demonstration: Creating a Schedule Template

Scenario:

Your company requires a new schedule for employees who work from 6 a.m. to 2 p.m., Monday through Friday.

Activity: Creating a Schedule Template

Starting Point: People > Time & Attendance > Schedules

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Above the Schedules grid, click Template.  
**Result:** the Templates window opens. |
| 2    | Click Create New.  
**Result:** the Add New Template window opens. |
| 3    | In the Name field, enter the name of the new schedule. |
| 4    | In the Description field, enter a description of the schedule. |
| 5    | In the Access field, select Private or Public.  
**Caution:** Selecting Private will restrict visibility to the schedule template creator. |
| 6    | In the This template will be available starting on field, enter the date that you want the schedule to start. |
| 7    | Select the cell for each day to be added to the schedule and then click (add).  
**Result:** the Add Shift window opens. |
| 8    | In the Start Time and End Time fields, enter the start and end times of the shift. |
| 9    | Enter data in any of the optional fields such as Pay Code, Lunch Plan, and Department as needed. |
| 10   | Click Save.  
**Result:** The start and end times are populated in the selected days of the week. |
| 11   | Click Save Template.  
**Result:** The schedule template is saved. You can now assign it to employees. |

Making Changes to Templates

Once saved, If you wish to edit a schedule Template, click its name on the Template page to open the Edit Template window. From there, you can make any changes to Name, Description, and effective date as needed, or add new shifts in the open cells.

To make changes to existing template shifts in the Edit Template window, click (settings) on the right side of the shift to display the menu. Select Edit, Add, or Delete. Multiple cells can also be selected for editing or deletion.
Assigning and Unassigning Schedule Templates

Overview

Display the slide and refer participants to the handout manual.

Demonstration: Assigning a Schedule Template

Review the information in the handout manual.
To assign employees to a schedule template, you select the desired template, select the employees to whom you wish to assign the schedule, and then specify an effective start date for the assignment.

Scenario

Refer participants to the handout manual.

Instructions

Guide a participant through the steps in the handout manual to assign a schedule template.
We'll start on the Templates window and locate the Manage Assignments link for the template we just created.

- Click the Manage Assignments link.

- In the employee grid, let's select Aimee Carriere and Xavier Saber.

- In the Employee column, check the box for Aimee Carriere and Xavier Saber.

- Next, let's select our date range.

- Click Next.

- The fastest way to add the same date range for multiple employees is to select the Set date range for all employees link.

- Click Set date range for all employees.

- Notice that the Start Week field defaults to 1. Most schedules have only a one-week rotation or repeat cycle. However, if you have schedules with multiple weeks, you can choose which week you want the employees to start. Complete the Start Date field with the date the employee is to begin this schedule. We don't need to enter an end date.

- In the Start Date field, select Monday of the current week.

- We can now save our changes.

- Click Apply to All.

- Click Submit.

- Click Back.

- Scroll down to view the rows for Aimee Carriere and Xavier Saber.
Assigning and Unassigning Schedule Templates

Overview

You can use the schedule templates that you set up to easily assign employees to schedules, based on predictable, repeating patterns. Employees can be assigned to multiple schedule templates as long as their scheduled times do not overlap. You can also end ongoing schedule assignments as of today or on a specific date.

Activity: Assigning a Schedule Template

Scenario

Assign Aimee Carriere and Xavier Saber to the 6 a.m. to 2 p.m. schedule template, starting today.

Instructions

Starting Point: People > Time & Attendance > Schedules > Templates

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Locate the desired schedule template in the list of those available. If it isn't displayed, enter the first few letters of its name in the Search by Name field.</td>
</tr>
<tr>
<td>2</td>
<td>In the row for the desired template, select Manage Assignments. Result: the Manage Assignments window opens.</td>
</tr>
<tr>
<td>3</td>
<td>Select the names of employees you want to assign a schedule template. To quickly locate an employee, enter a name in the Search field above the grid.</td>
</tr>
<tr>
<td>4</td>
<td>Click Next.</td>
</tr>
<tr>
<td>5</td>
<td>Select Set date range for all employees.</td>
</tr>
<tr>
<td>6</td>
<td>Enter a Start Date and click Apply to All.</td>
</tr>
<tr>
<td>7</td>
<td>Click Submit. Result: You are returned to the Templates window.</td>
</tr>
<tr>
<td>8</td>
<td>Click Back. Result: The template is assigned to the selected employees and displays in the Schedules grid.</td>
</tr>
</tbody>
</table>
Ending an Employee's Schedule Assignment

Overview

Refer participants to the handout manual.

Instructions

*Do not read the steps in the procedure.*

This job aid provides you with instructions for ending scheduled assignments.
Ending an Employee’s Schedule Assignment Job Aid

Overview

For permanent schedule changes, you can end an employee’s schedule template assignment. By ending a schedule template assignment, you preserve the historical information related to that schedule.

Instructions

Starting Point: People > Time & Attendance > Schedules

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Above the Schedules grid, click Template. <strong>Result:</strong> the Templates window opens.</td>
</tr>
<tr>
<td>2</td>
<td>In the row for the desired template, click the number in the Assigned Employees column.</td>
</tr>
<tr>
<td>3</td>
<td>Select the names of the employees that you wish to unassign to the template.</td>
</tr>
<tr>
<td>4</td>
<td><strong>If you want to</strong></td>
</tr>
<tr>
<td>Remove assignments immediately:</td>
<td>Click Remove Assignments. Select the option that reflects whether you want the shifts removed as of the start of the current pay period, or removed from all future shifts. <strong>Note</strong> that the shift history prior to either of these options will not be deleted. Click OK.</td>
</tr>
<tr>
<td>Remove assignments at a future date:</td>
<td>Click Next. Use the calendar picker to enter a value in the End Date field or select a date range for all employees. Click Submit.</td>
</tr>
<tr>
<td>5</td>
<td>Click Back on the Manage Assignments and Templates window. <strong>Result:</strong> the Schedules grid no longer displays the employees’ template assignment.</td>
</tr>
</tbody>
</table>
Demonstration: Editing Shifts

Overview

Refer participants to the handout manual.
The Schedules grid has controls that provide an intuitive way to edit and delete shifts.

Point to a grid cell to display hover menu.
When you point to a shift in the grid, the hover menu will display. If you click the Edit icon, or pencil, the Edit Shift dialog box will open and you can change a single shift.
If you click the Delete icon, or trash can, you can delete a single shift.

What if you want to edit or delete multiple shifts for one or more employees?
Answer: Use the Select icon, or check mark to edit or delete multiple shifts.
Click the Select icon for multiple shifts and point to the Action Bar.
Clicking the Select icon will launch the Action Bar at the top of the grid. From there you can Edit, Delete, or Clear All shifts, or Copy and Paste scheduled shifts.

What do you think the difference is between the icons in the first row of the hover menu and those in the second?
Answer: The icons in the first row are used to edit or delete existing shifts. The icons in the second row are used for adding additional shifts that don't overlap with the existing assignments. The Add icon is used to add a single shift, while the check mark is used to add multiples.
Activity: Editing Shifts

Overview

For simple edits to the start and end time of a shift, you can double click in the shift and enter the changes. To change existing shifts assigned to one or more employees, you can make the changes using the hover menu.

On the hover menu, the Edit icon and Delete icons allow you to edit or delete single shifts from the grid. The Select icon allows you to select multiple shifts which can then be edited, deleted, copied, and pasted using the Action Bar.

Cells with existing shifts have a second row in the hover menu. The Add icon allows you to add a single daily shift to a cell, while the Select icon allows you to select multiple cells to which daily shifts can then be added using the Action Bar. Added shifts cannot overlap with existing shifts.
Demonstration: Editing Shifts (cont.)

Scenario
Refer participants to the handout manual.

Instructions

Guide a participant through the steps in the handout manual to edit shifts in the grid. For this edit, let's make our changes directly in the grid using the hover menu. Locate Diane Eschete’s schedule and activate the hover menu for Wednesday.

Locate Diane Eschete row in the grid and activate the hover menu for Wednesday.

Click the Select icon on the top row for Wednesday then repeat the process for Thursday.

Click the Select icons for both Wednesday and Thursday.

Now, locate the Action Bar and launch the Edit Multiple Shifts window.

Click Edit on the Action Bar.

Next we need to click the Toggles for all of the fields we need to activate.

Click toggle switches for Start Time, End Time, Department, and Note.

Let's change our Start and End Times, followed by the Department.

Change Start Time to 7:00 AM.
Change End Time to 3:00 PM.

Use the Department dropdown to select 310000 - Customer Service.

Notice at the top of the window there is an informational icon that will display next to fields when the selected shifts contain different values.

If selected shifts have different parameters, what do you think will happen when changes are applied?

Answer: Any changes made on the Edit multiple shifts window will be applied to all shifts selected.

Let's add a note to Anthony’s schedule to explain his schedule change.

In the Note field, enter Diane is helping the Customer Service department.

Click Save.

The (note) indicator now appears in that cell. You can point to it to display the contents. We also want to display the department linked to the shift in our cell. You do this by selecting View Labor Charges in the Preferences. Preferences are available above the grid, under the More menu.

From the More menu, select Preferences.
Select the View Labor Charges box.
Click Apply.

Tip
Refer participants to the handout manual.
Activity: Editing Shifts (cont.)

Scenario

The Customer Service department requested Diane Eschete's assistance for two days this week. Change her schedule on Wednesday and Thursday to 7 a.m. to 3 p.m., and make sure the hours are coded to the right department. Add a note indicating the reason for the change.

Instructions

Starting Point: People > Time & Attendance > Schedules

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Locate the employee in the scheduling grid and locate the shifts to be modified. To quickly locate an employee, enter a name in the Search field above right hand corner of the grid.</td>
</tr>
<tr>
<td>2</td>
<td>Hover over each shift to activate the hover menu and click (select) in each shift. Result: The Action Bar launches.</td>
</tr>
<tr>
<td>3</td>
<td>Above the grid in the open Action Bar, click Edit to make changes to the shifts. Result: The Edit Multiple Shifts dialog displays.</td>
</tr>
<tr>
<td>4</td>
<td>Click the toggle switches to activate any fields you wish to change.</td>
</tr>
<tr>
<td>5</td>
<td>Change the Start Time and End Time.</td>
</tr>
<tr>
<td>6</td>
<td>Change the Department.</td>
</tr>
<tr>
<td>7</td>
<td>Enter the contents of the note.</td>
</tr>
<tr>
<td>8</td>
<td>Click Save. Result: A (note) indicator appears in the edited shift cell. Point to it to display the contents. To view all notes on an employee's schedule, click (action) and select View All Notes.</td>
</tr>
<tr>
<td>9</td>
<td>Above the grid under the More Menu, select Preferences.</td>
</tr>
<tr>
<td>10</td>
<td>Select View Labour Charges.</td>
</tr>
<tr>
<td>11</td>
<td>Click Apply.</td>
</tr>
</tbody>
</table>

Tip

When editing shifts, there is no limit to the number of shifts you can select, and the details of the shifts do not need to match. When shifts are selected with different field values, any changes made on the Edit multiple shifts window will be applied to all selected shifts.
Demonstration: Creating and Assigning Quick Shifts

Overview
Refer participants to the handout manual.
Another useful feature on the Action Bar is the ability to add Quick Shifts, which are your commonly used shifts. From the Action Bar’s Quick Shift panel, you can create a new Quick Shift or drag and drop an existing one anywhere on the grid, where it will be applied to all selected cells.

Scenario
Refer participants to the handout manual.

Instructions
Guide a participant through the steps in the handout manual to create and assign a Quick Shift.
First, let’s locate our employees in the grid, and use the hover menu to select the days we wish to assign.

Locate Adeline Ancel’s row in the grid and click (select) for Tuesday and Thursday.
Repeat process for Heidi Condo.

Notice that the Action Bar is open. Now let’s launch the Quick Shifts panel from it and create a Quick Shift.

Click Quick Shifts.
Click Add.

In the Add Quick Shift window, we need to enter values in the required fields, which are indicated with red asterisks. Then we can save the Quick Shift.

In Shift Name enter PT Evening.
In Start Time enter 3:00 PM.
In End Time enter 11:00 PM.
Click Done.

The Quick Shift now appears in the carousel. We want to assign the Quick Shift, which is done with a simple drag and drop. This can be done anywhere on the schedule grid.

Drag and drop the PT Evening Quick Shift into the schedule grid.
Scroll to Adeline Ancel and Heidi Condo.
The Quick Shift was applied to all cells that were selected.

Important Information
Refer participants to the handout manual.

Tip
Notice if we hover over the shift in the carousel, the familiar Pencil and Trash Can icons appear which would allow us to edit or delete the Quick Shift.
Refer participants to the handout manual.
Activity: Creating and Assigning Quick Shifts

Overview
Quick Shifts are commonly used shifts that can be accessed from the More menu or from the Action Bar when one of more cells are selected. From the Action Bar’s Quick Shift panel, you can quickly create and assign a new Quick Shift, or drag and drop an existing shift onto the scheduling grid where it will be applied to all selected cells.

Scenario
Frequently, additional employees need to be assigned to the 3 p.m. to 11 p.m. shift for adequate schedule coverage. Create a Quick Shift that can be used as needed from 3 p.m. to 11 p.m. and assign it to Heidi Condo and Adeline Ancel on Tuesday and Thursday of the current week.

Instructions
Starting Point: People > Time & Attendance > Schedules

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Locate the employees in the scheduling grid and the shifts to be modified.</td>
</tr>
<tr>
<td>2</td>
<td>Point to the cells in the grid to activate the hover menu and then click (select) to select the cells. &lt;br&gt;Result: The Action Bar launches.</td>
</tr>
<tr>
<td>3</td>
<td>Click Quick Shifts. &lt;br&gt;Result: The Quick Shifts panel opens.</td>
</tr>
<tr>
<td>4</td>
<td>In the Quick Shifts panel, click (add). &lt;br&gt;Result: The Add Quick Shift window opens.</td>
</tr>
<tr>
<td>5</td>
<td>Enter a Shift Name, Start Time and End Time, and complete other fields, if applicable.</td>
</tr>
<tr>
<td>6</td>
<td>Click Done. &lt;br&gt;Result: The Quick Shift is displayed in the panel.</td>
</tr>
<tr>
<td>7</td>
<td>Drag and drop the Quick Shift into the schedule grid. &lt;br&gt;Result: The Quick Shift is added to the selected cells.</td>
</tr>
</tbody>
</table>

Important Information
Quick Shifts are only available for the user who created them.

The Quick Shift panel will display an arrow on the right side if there are more quick shifts than will display on the page.

Tip
To edit or delete Quick Shifts, hover over the shift in the Quick Shift Panel to activate the Edit or Delete icons.
Fixing Exceptions

Overview

Review the slide contents and refer participants to the handout manual.

Say: We just showed you how to fix exceptions when you find them in an employee’s timecard. You can also view timecard exceptions without accessing individual employee’s timecards.

Explore: Locating Exceptions by Employee

Say: Timecard exceptions can be found in two ways: by employee and by type of exception.
Let’s locate exceptions by employee.

Select People > Time & Attendance > Timecard Exceptions.

The Timecard Exceptions is by Employee and Type page displays all of the employees whose timecards have exceptions. As a result, you only view those items that generated exceptions. For example, you can see that Albert Delaney has several time pair exceptions.

Solutions and Descriptions

Refer participants to the handout manual.

Say: Your handout manual contains a description of the fields on the Timecard Exceptions by Employee and Type page. This information should be helpful to you once you are back on the job.
Fixing Exceptions

Overview

Timecard exceptions can be found in two ways: by employee or by type of exception.

Exceptions can be located by type and employee on the My Team tab and People tab. When accessing pages on the My Team tab, only employees assigned to the Time & Attendance supervisor and their direct reports will display.

The Timecard Exceptions tab shows both exceptions by employee and exceptions by type in a single grid. Only employees with exceptions will display on the Timecard Exceptions page.

You only need to resolve actionable exceptions. It is not required to note or acknowledge exceptions that do not impact the payroll process, such as clocked in late or clocked out early.

The exceptions are displayed by exception severity order (error, warning, or message). Exceptions that must be resolved before the payroll is processed are noted with an exclamation point and in red.

Position ID and Position Title (if configured) are displayed below each employee name.

Typically, supervisors edit timecards with exceptions. However, depending on your role, you may complete this task or a supervisor may need help, may not be available, or may assign this task to you.

To find exceptions related to an individual employee's timecard, click the employee's name to go to their timecard.

Explore: Locating Exceptions by Employee

Solutions and Descriptions

<table>
<thead>
<tr>
<th>Solution</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>Marks the time pair as approved, then removes the exception from the time pair and from the exceptions summary.</td>
</tr>
<tr>
<td>Note</td>
<td>Indicates that you are aware of the exception but does not change the condition that caused the exception. This is a common solution for low-severity exceptions. The exception is stored for future reference but no longer displays in the exceptions summary. This solution is irreversible.</td>
</tr>
<tr>
<td>Use schedule</td>
<td>Resolves the exception by applying the employee's schedule to the time pair. This solution is common to exceptions caused by missing punches, incorrect time punches, or total hours. This option is available only if a schedule exists for the employee. The employee's schedule displays in parentheses to the right of the exception description so that you can evaluate the effect of applying the schedule to the employee's transaction details.</td>
</tr>
</tbody>
</table>
Demonstration: Fixing Exceptions by Type

Say: Next, let’s look at viewing exceptions by type.

Scenario

Say: There are several types of exceptions listed. We are going to focus on just two. You can refer to online Help for a description of the exception types and how to resolve them.

Today, we want to locate all of the errors generated when employees forget to punch out at the end of their work day – missing out punches error.

Missing out punches are resolved in the same way that we resolved missed punches in the previous topic. You will get a chance to practice that task in a few minutes.

Let’s look at how to resolve Missing Out punch on Time Pair.

Activity: Fixing Exceptions by Type

Guide the class through the activity

Say:

Select People > Time & Attendance > Timecard Exceptions.

Click a numbered link in the Totals row to navigate to the Timecard Exceptions Detail page to view all exceptions for that type for all employees.

Click Missing Out Punch on Time Pair.

This page displays any timecard exceptions generated by in and out punches that fall within a short window of time. As a result, when the application applies rounding rules to the time pair, the total hours cannot be calculated. These exceptions are typically the result of an employee entering a duplicate punch when clocking in or out.

To edit the timecard, you click the link in the Time column. Let’s correct this error.

Right-click in the Time Out column and select Use Scheduled Out Time.

Let’s practice editing hours and fixing exceptions by type.
Demonstration: Fixing Exceptions by Type

We will now to demonstrate how to fix exceptions by type.

Scenario:

Today, we want to locate all of the errors generated when employees forget to punch out at the end of their work day – missing out punches error.

Activity: Fixing Exceptions by Type

Starting point: People > Time & Attendance > Timecard Exception

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Click a numbered link in the Totals row.  
**Result:** The Timecard Exceptions Detail page displays all exceptions for that type for all employees. All employees with that exception type displays.  |
| 2    | Right-click in the Time Out column and select Use Scheduled Out Time for each employee.  |
| 3    | Click Save.  
**Result:** The timecard exception has been resolved and it no longer displays in the list of exceptions.  |
| 4    | To return to the list of exception types, click Timecard Exceptions.  |
| 5    | Repeat steps 2 through 5 until you have resolved all of the exceptions.  |
Module 1: Debrief

Review the last few topics using the following SIGA processing questions:

S: (Share) How do you feel about editing hours, and fixing exceptions by type?
I: (Interpret) What do you understand better about editing individual timecards?
G: (Generalize) How would you summarize what we’ve just discussed?
A: (Apply) How will you use this back on the job?

Summary

Topics

Review the slide contents.
In this module, you reviewed many of the steps necessary to maintain timecards
Module 1: Debrief

1. How do you feel about editing hours, and fixing exceptions by type?
2. What do you understand better about editing individual timecards?
3. How would you summarize what we've just discussed?
4. How will you use this back on the job?

Summary

In this module the following topics have been explored:

- The Time & Attendance Cycle
- Editing Individual Timecards
- Creating Schedule Templates
- Fixing Exceptions