Time & Attendance
for ADP Workforce Now®

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## Estimated Time

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<th>Topic</th>
<th>Duration</th>
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</thead>
<tbody>
<tr>
<td>Introduction</td>
<td></td>
</tr>
<tr>
<td>The Time &amp; Attendance Workflow Process</td>
<td></td>
</tr>
<tr>
<td>Editing Timecards</td>
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</tr>
<tr>
<td>Explore: Using Timecards</td>
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<tr>
<td>Scheduling Employees</td>
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<td>Fixing Exceptions</td>
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</tr>
<tr>
<td>Debrief</td>
<td></td>
</tr>
<tr>
<td><strong>Total: Module 1:</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Module 2:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td></td>
</tr>
<tr>
<td>Preparing Time &amp; Attendance Data for Payroll</td>
<td></td>
</tr>
<tr>
<td>Starting a New Pay Period</td>
<td></td>
</tr>
<tr>
<td>Explore: Prepare for Payroll Page</td>
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<tr>
<td>Knowledge Check</td>
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<td>Debrief</td>
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<td><strong>Total Module 2:</strong></td>
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### Module 3:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Duration</th>
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</thead>
<tbody>
<tr>
<td>Support After Class</td>
<td></td>
</tr>
<tr>
<td>Course Closing</td>
<td></td>
</tr>
<tr>
<td><strong>Total Module 3:</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Total – Course: 1 day (4hrs)**
Time & Attendance
for ADP Workforce Now®

Course Introduction

Automatic Data Processing, LLC.
ES Canada
Course Introduction

Welcome

Welcome to Time & Attendance for ADP Workforce Now®. Let me introduce myself. Does everyone have a copy of the handout manual? You'll refer to it throughout the course.

The following paragraph is for VC only. To minimize background noise, use your phone’s mute function or on your phone's keypad, press *6 to mute the line and *7 to un-mute the line. Be sure to state your name before speaking. Do not place your phone on hold.

Present the following information by referencing the slides and handout manual as indicated.

Introductions and Expectations (ILT Only)

Administrative (ILT Only)

Norms

Course Purpose

This course has been designed to provide you with the knowledge and hands-on experience required to be comfortable using Time & Attendance for ADP Workforce Now®.

Course Objective

Upon completion of this course, participants will be able to:

- Identify The Time & Attendance Process Flow
- Edit Individual Timecards
- Creating a Schedule Template
- Fix Exceptions
- Prepare Time & Attendance Data for Payroll
- Start New Pay Period
Course Introduction

Course Purpose
This course has been designed to provide you with the knowledge and hands-on experience required to be comfortable using Time & Attendance for ADP Workforce Now®.

Course Objectives
Upon completion of this course, participants will be able to:

- Identify The Time & Attendance Process Flow
- Edit Individual Timecards
- Create a Schedule Template
- Fix Exceptions
- Prepare Time & Attendance Data for Payroll
- Start New Pay Period
Course Agenda

Say: During this course we will explore several topics. Each topic and module within ADP Workforce Now® training has been designed to build upon the previous topic/module. Upon completion of the training, you will have a complete picture of how each individual module functions, and how they work together to create a complete solution.

In addition ADP provides three different online resource tools that are designed to support your learning after class.

During this course you will explore the following topics:

- **Module 1:** Maintaining Timecards
- **Module 2:** Prepare for Payroll Processing
- **Module 3:** Course Closing
Course Agenda

During this course we will explore several topics. Each topic and module within ADP Workforce Now® training has been designed to build upon the previous topic/module. Upon completion of the training, you will have a complete picture of how each individual module functions, and how they work together to create a complete solution.

In addition ADP provides three different online resource tools that are designed to support your learning after class.

During this course you will explore the following topics:

<table>
<thead>
<tr>
<th>Modules</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module 1: Maintaining Timecards</strong></td>
<td>Introduction</td>
</tr>
<tr>
<td></td>
<td>The Time &amp; Attendance Process Flow</td>
</tr>
<tr>
<td></td>
<td>Editing Individual Timecards</td>
</tr>
<tr>
<td></td>
<td>Explore: Using Individual Timecards</td>
</tr>
<tr>
<td></td>
<td>Scheduling Employees</td>
</tr>
<tr>
<td></td>
<td>Fixing Exceptions</td>
</tr>
<tr>
<td></td>
<td>Debrief</td>
</tr>
<tr>
<td><strong>Module 2: Prepare for Payroll Processing</strong></td>
<td>Introduction</td>
</tr>
<tr>
<td></td>
<td>Preparing for Payroll Tasks</td>
</tr>
<tr>
<td></td>
<td>Explore: Prepare for Payroll Page</td>
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<td></td>
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<td></td>
<td>Knowledge Check</td>
</tr>
<tr>
<td></td>
<td>Debrief</td>
</tr>
<tr>
<td><strong>Module 3: Close Closing</strong></td>
<td>Support After Class</td>
</tr>
<tr>
<td></td>
<td>Course Closing</td>
</tr>
</tbody>
</table>
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 a Schedule Templates
- Fix Exceptions
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 Process Flow
- Edit Individual Timecards
- Create a 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 Pay Date Range fields</td>
<td>Indicate the period of time for which information is currently being displayed and allow you to change the time period. You can select a predefined range (such as Previous Pay Period or Current Pay Period) using the menu or you can specify a User-Defined Date Range up to a maximum of 31 days.</td>
</tr>
<tr>
<td>2 Magnifying glass icon</td>
<td>When clicked, opens a pop-up window that displays all of the available values for the field. For example, to assign hours to a particular pay code or department, click the field to display the icon and select the value from the list that displays.</td>
</tr>
<tr>
<td>3 Entry fields</td>
<td>Display clock in and clock out times and/or the total hours worked.</td>
</tr>
<tr>
<td>4 Quick View Links</td>
<td>Timecard Icon quickly take you to Printable view of the Employee’s Timecard, Totals, Schedule, viewing Time Off Balances.</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 Search Fields</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Timecard Tab** | 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.  
  - *Timecard information is totaled by week and pay period with the option to display the hours in a daily or cumulative view.*  
  - *Tabs to access totals, time off balances, and schedules.*  
  - *Timecard and row menus to complete tasks.* |
| **Totals Tab** | 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. |
| **Schedule Tab** | 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.  
  You can edit timecard transactions from the Schedules page. |
| **Supplemental Earnings Tab** | Shows the supplemental pay sources and their corresponding codes |
| **Time Off Balances** | Shows the available balance for each time off policy defined |
| **Preferences** | Allows you to specify how the Individual Timecard is displayed |

**Legend** Shows the visual indicators and their associated meanings:
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 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. |
| 5    | If necessary, make any other edits to the employee’s timecard and then click the appropriate button to save your changes. |

IF you want: |

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.  

THEN: |

Click Save.
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 <strong>Time Out</strong> field, type <strong>1245p</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>In that same row, click the <strong>Timecard icon</strong>, and select [Add Blank Row]. <strong>Result:</strong> A duplicate row is inserted for that day.</td>
</tr>
<tr>
<td>4</td>
<td>In the new row, in the <strong>Time In</strong> field, type <strong>145p</strong> and press <strong>tab</strong>.</td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>Time Out</strong> field, type <strong>6p</strong> and press <strong>tab</strong>.</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>
<tr>
<td>2</td>
<td>Right-click the punch 3:47 PM and select Delete Time. <strong>Result:</strong> The 3:47pm punch is replaced by the 4:30pm punch, and the extra row will be deleted when we save our changes.</td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>
Demonstration: Editing Non-worked Time for Hours-Based Employees

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

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

Guide the class through the activity.

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>
<tr>
<td>2</td>
<td>In the timecard, correct the number of hours worked. Replace 7 with 8. <strong>IF you need to edit:</strong> <strong>THEN:</strong> The total number of hours worked</td>
</tr>
<tr>
<td>2</td>
<td>In the timecard, correct the number of hours worked. Replace 7 with 8. <strong>IF you need to edit:</strong> <strong>THEN:</strong> The number of hours because the employee worked part of the day</td>
</tr>
<tr>
<td>3</td>
<td>Add a row by clicking the Timecard icon, and select <strong>Add Blank Row</strong> and type 4.</td>
</tr>
<tr>
<td>4</td>
<td>In that same row, to display the magnifying glass icon, click in the Pay Code field.</td>
</tr>
<tr>
<td>5</td>
<td>Click the magnifying glass icon and then click the appropriate earnings code. Select Personal</td>
</tr>
<tr>
<td>6</td>
<td>Click the Timecard icon, and Add Note and, in the Note window, enter your note. <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>7</td>
<td>Click Ok. <strong>Result:</strong> The row where you added the note has a yellow icon.</td>
</tr>
<tr>
<td>8</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>
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>
<th>Action</th>
</tr>
</thead>
<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. In the Hours field, enter 7.</td>
</tr>
<tr>
<td>3</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>4</td>
<td>Click the Timecard icon, and Add Note and, in the Note window, enter your notes. 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.</td>
</tr>
<tr>
<td>5</td>
<td>Click Ok. Result: The row where you added the note has a yellow icon.</td>
</tr>
<tr>
<td>6</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

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

**IF the transfer is a:**

**THEN:**

- **Full work day**
  - In the Hours field for the work day, enter the total hours

- **Partial work day**
  - 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

Click in the Department field.

Click the magnifying glass icon and then click the department code 310000

Click Save.
MODULE 1: MAINTAINING TIMECARDS

Scheduling Employees

Overview

*Say:* You can use schedules to easily view the shifts that your employees work and to ensure that you have adequate coverage on all shifts.

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

Types of Schedules

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

Example of a Daily Schedule

Review the information in the handout manual.

Example of a Recurring Schedule

Review the information in the handout manual.

Role Differences by Task

Review the slide contents and refer participants to 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 work with two types of schedules:

- **Daily** – Use to assign a schedule to one or more employees only for specific days
- **Schedule Templates** – Use to assign a repeatable schedule to one or more employees for multiple days

**Example of a Daily Schedule**
Adeline Ancel is assigned a morning shift of 7:00 a.m. to 3:00 p.m. Since he is scheduled to attend a training session from 9:00 a.m. to 5:00 p.m. on Wednesday, he 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 Thursday. 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.

**Role Differences by Task**
The table below lists basic scheduling tasks and the users who can perform them. Practitioners and Supervisors can create schedule templates.

<table>
<thead>
<tr>
<th>Task</th>
<th>Can Supervisors Complete This Task?</th>
<th>Can Practitioners Complete This Task?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign daily schedules</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Create daily schedules</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Assign schedule template</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Create schedule templates</td>
<td>√</td>
<td>√</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:

You need to set up a repeatable or schedule template so that you or your supervisors can quickly assign that schedule to employees. Let’s begin by accessing the Schedule Templates page.

Activity: Creating a Schedule Template

Let’s begin by accessing the Schedule Templates page.

Select People > Time & Attendance > Schedules > Template tab.

On the Templates tab, click on the Green Action icon and Create New.

In the Code field, enter a short name to reflect the schedule time frame.

Say: In this example, your schedule will be assigned to employees who work the six o’clock a.m. to two o’clock p.m. shift every week. Let’s enter a description that will help supervisors easily identify the schedule time frames.

In the Description field, enter First Shift.

Click the Calendar icon in the Effective Date field and select the earliest date on which you want the schedule to be available.

In the Time In field enter 6:00 AM.

In the Time out field enter 2:00 PM.

In the Day of Week column, hold the Shift key and select the days on which this schedule applies.

Click Add Shift(s).

Click Save.

Note:
Notice the “Template has been saved successfully” message displays.
Demonstration: Creating a Schedule Template

We will now demonstrate the process of creating a schedule template.

Scenario:

You need to set up a repeatable or schedule template so that you or your supervisors can quickly assign that schedule to employees. Let’s begin by accessing the Schedule Templates page.

Activity: Creating a Schedule Template

Starting Point: People > Time & Attendance > Schedules > Template tab.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the Templates tab, click on the Green Action icon and Create New.</td>
</tr>
<tr>
<td>2</td>
<td>In the Code field, enter 6 AM-2PM.</td>
</tr>
<tr>
<td>3</td>
<td>In the Description field, enter First Shift.</td>
</tr>
<tr>
<td>4</td>
<td>Click the Calendar icon in the Effective Date field and select the earliest date on which you want the schedule to be available to the supervisors.</td>
</tr>
<tr>
<td>5</td>
<td>In the Time In field enter 6:00 AM.</td>
</tr>
<tr>
<td>6</td>
<td>In the Time out field enter 2:00 PM.</td>
</tr>
<tr>
<td>7</td>
<td>In the Day of Week column, hold the Shift key and select the days on which this schedule applies.</td>
</tr>
<tr>
<td>8</td>
<td>Click Add Shift(s).</td>
</tr>
<tr>
<td>9</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>
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 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>
<tbody>
<tr>
<td>1</td>
<td>Click a numbered link in the Totals row. &lt;br&gt;Result: The Timecard Exceptions Detail page displays all exceptions for that type for all employees. All employees with that exception type displays.</td>
</tr>
<tr>
<td>2</td>
<td>Right-click in the Time Out column and select Use Scheduled Out Time for each employee.</td>
</tr>
<tr>
<td>3</td>
<td>Click Save. &lt;br&gt;Result: The timecard exception has been resolved and it no longer displays in the list of exceptions.</td>
</tr>
<tr>
<td>4</td>
<td>To return to the list of exception types, click Timecard Exceptions.</td>
</tr>
<tr>
<td>5</td>
<td>Repeat steps 2 through 5 until you have resolved all of the exceptions.</td>
</tr>
</tbody>
</table>
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
Time & Attendance
for ADP Workforce Now®
Module 2: Preparing for Payroll Processing

Automatic Data Processing, LLC.
ES Canada
Module 2: Introduction

Purpose

This module will demonstrate the tasks associated with preparing for payroll processing.

Objectives

In this module we will learn how to:

- Prepare Time & Attendance Data for Payroll
- Start a New Pay Period
Module 2: Introduction

Purpose
This module will demonstrate the tasks associated with preparing time & attendance data for payroll.

Objectives
This module you will learn how to:
- Prepare Time & Attendance Data for Payroll
- Start a New Pay Period
Preparing for Payroll Tasks

Overview

*Review the slide contents.*

The Time & Attendance Cycle

*Review the slide contents.*

*Say: Let’s look at the Time & Attendance Cycle illustration to see where we are in the process.*

*Stages 1 and 2 are completed. Now we are starting on stage 3.*
Preparing for Payroll Tasks

- **Overview**

At the end of the pay period, you perform a series of tasks to close the pay period. These tasks include:

- Locking the pay cycle to prevent further changes
- Correcting any critical errors
- Preparing an export file to be used in Payroll and Run Reports
- Moving to the next pay period
Explore: Prepare for Payroll Page

Overview

Say: Let’s assume that it’s the end of the pay period. Your employees have entered their time, and your supervisors have reviewed and approved the employees’ timecards. Now it’s time to prepare your Time & Attendance data for payroll processing.

To begin the validation process, we will access the Prepare for Payroll page.

Select Process > Time & Attendance > Prepare for Payroll.

Options and Descriptions

Refer participants to the handout manual.

Say: On the Prepare for Payroll page, you’ll notice all pay cycles are displayed. Also, notice that there is a status column, where there are two statuses: Open and Locked.

When you click on Start Preparation, the application will automatically launch the first step, notifying you that the Prepare for Payroll steps are running automatically and to stand by.

As each step launches, text displays to explain the purpose of that step and the expected action you need to take, if any.
Explore: Prepare for Payroll Page

Options and Descriptions

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Preparation</td>
<td>The application runs through the same validation process, it stops only if exceptions are found that require your attention. You can then fix the exception, and the process will continue automatically.</td>
</tr>
</tbody>
</table>
Demonstration: Check for Pending Events and Payroll-Related Exceptions

*Say:* I will now demonstrate how to check for pending events and payroll-related exceptions. 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:* Let’s assume that it’s the end of the pay period. Your employees have entered their time, and your supervisors have reviewed and approved the employees’ timecards. Now it’s time to prepare your Time & Attendance data for payroll processing.

Activity: Check for Pending Events and Payroll-Related Exceptions

*Guide the class through the activity.*

*Say:* For the purposes of this demonstration, we are going to walk through the Preparing for Payroll process step-by-step.

For Bi-Weekly Pay Cycle (BI-WKLY), click **Start Preparation**.
Click **Next Step**.

*The second step checks for payroll-related exceptions such as missing supervisor approvals. Since there aren’t any of these exceptions, we’ll proceed.*

Important Information

*Refer participants to the handout manual.*
Demonstration: Check for Pending Events and Payroll-Related Exceptions

We will now demonstrate the process of Checking for pending events and payroll related exceptions

Scenario:

Let’s assume that it's the end of the pay period. Your employees have entered their time, and your supervisors have reviewed and approved the employees’ timecards. Now it’s time to prepare your Time & Attendance data for payroll processing

Activity: Check for Pending Events and Payroll-Related Exceptions

Job Aid

Starting Point: Process > Time & Attendance > Prepare for Payroll

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the Action column, click <strong>Start Preparation</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>If any pending events or payroll-related exceptions occur, follow the instructions on the screen.</td>
</tr>
</tbody>
</table>

Important Information

- Only active payroll cycles display on the Prepare for Payroll page. Contact your ADP representative to request that a payroll cycle be made inactive, which will prevent it from being used.
- Approval policies vary from one company to another. This optional task may not be available if your company does not require approvals.
Demonstration: Check Transaction Exceptions

Say: I will now demonstrate how to check transaction exceptions. 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: You are completing the steps to prepare for payroll, and an employee's timecard shows timecard exceptions. The supervisor is not available to fix the timecard, so you must resolve the exceptions in order for you to proceed with the steps.

Activity: Check Transaction Exceptions

Guide the class through the activity.
Demonstration: Check Transaction Exceptions
We will now demonstrate how to check transaction expiations

Scenario
You are completing the steps to prepare for payroll, and an employee’s timecard shows timecard exceptions. The supervisor is not available to fix the timecard, so you must resolve the exceptions in order for you to proceed with the steps.

Activity: Check Transaction Exceptions
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>In the Edit Exceptions column, click the pencil icon. Result: The Timecard for Employee with Exceptions page displays.</td>
</tr>
<tr>
<td>2</td>
<td>Correct the error.</td>
</tr>
<tr>
<td>3</td>
<td>Click Save. Result: The exception is resolved. The timecard is updated, and the hours are recalculated. The process continues Prepare for Payroll.</td>
</tr>
</tbody>
</table>
Demonstration: Performing Payroll Export and Run Reports

_Say_: I will now demonstrate how to perform payroll export. 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_: You need to run the Payroll Detail report to verify the data, such as total hours and earnings.

Activity:– Check Payroll Export and Run Reports

_Guide the class through the activity._

_Say_: At the fourth step, the current payroll cycle locks automatically and no more timecard changes are possible. Now you need to run the Payroll Detail report to verify the data, such as total hours and earnings.

_Note_: The Access Reports option is only available when in the previous step user selected in the run end of pay period column to do it automatically.

_Click "Access Reports to Run Payroll/Timecard Reports"._

The list of My Reports displays. These are frequently run reports that you have saved or your Implementation Specialist has saved for you.

_Click Payroll Detail Report, click the green action icon._

_Click Run Now._

_You can view the status of the report on the Output tab. You may need to click Refresh to update the status of the report. Once the report status is completed, you can view the report._

_Click Next to the Payroll Detail Report, click the green action icon and click View as PDF._

_This report was set up to run as a PDF file. Use the report to verify that the totals for each employee are accurate, and if possible print the report. Let’s assume that all totals are accurate so you can proceed to the next step and create the payroll export file._

_Close the report window._

Important Information

_Refer participants to the handout manual._
Demonstration: Check Payroll Export and Run Reports

Overview
Running reports ensures that employees are paid correctly. Before creating the payroll export file, run the following reports (if applicable):

- The Posting Transaction Error Report lists punch errors that were made but not imported into employee timecards. This report is available only if your employees use time clocks to enter their time.
- The Payroll Detail Report lists the total hours and earnings codes charged to each employee.

Scenario:
You need to run the Payroll Detail report to verify the data, such as total hours and earnings.

Activity: Check Payroll Export and Run Reports
Starting point: This activity Carries on form the previous exercise

<table>
<thead>
<tr>
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</table>
| 1    | On the Check Payroll Export page, click Access Reports to Run Payroll/Timecard Reports.  
Result: The My Reports page displays.  
Note: If you have not saved the report as a My Report, you can access it on the Standard Reports tab. |
| 2    | Next to the Payroll Detail Report, click the green action icon. |
| 3    | Click Run Now.  
Result: The status of the report displays on the Output tab.  
Note: You may need to click Refresh to update the status. |
| 4    | Next to the Payroll Detail Report, click the green action icon and click View as PDF. |

Important Information
If you see any discrepancies on the Payroll Detail report, start the Prepare for Payroll again. Then, click Locked hyperlink to unlock the Pay Cycle, and start the Prepare for Payroll steps again.
Demonstration: Create the Payroll Export File

Say: I will now demonstrate how to create the Payroll Export File. 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:
Now that you've validated your data, you need to upload it to Payroll. You do this by creating a payroll export file for the current pay period that is in a format readable by the Payroll product component.

Activity: Create the Payroll Export File

Guide the class through the activity.
Say: Refer participants to the handout manual.

Select Process > Time & Attendance > Prepare for Payroll.
In the row for the Bi-Weekly pay cycle, click Start Preparation.

The Prepare for Payroll action will pause at the Checking payroll export requirements step to allow you to create the export file.

Click Create Export.

The export file is being created and uploaded to Payroll.

Important Information

Review the information in the handout manual.
**Demonstration: Create the Payroll Export File**

We will now demonstrate how to create payroll export file.

**Scenario**

Now that you've validated your data, you need to upload it to Payroll. You do this by creating a payroll export file for the current pay period that is in a format readable by the Payroll product.

**Activity: Create the Payroll Export File**

**Starting point: Process > Time & Attendance > Prepare for Payroll.**

<table>
<thead>
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<th>Step</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the Action column, click Start Preparation.</td>
</tr>
<tr>
<td>2</td>
<td>Click Create Export.</td>
</tr>
<tr>
<td></td>
<td><strong>Result:</strong> The Export begins processing.</td>
</tr>
<tr>
<td>3</td>
<td>The Export file is automatically uploaded to Payroll.</td>
</tr>
<tr>
<td>4</td>
<td>Click Continue to Payroll button and then click Finished.</td>
</tr>
</tbody>
</table>

**Important Information**

It is available to your Payroll practitioner in the Verify Input section (Payroll Cycle > Verify Input > Pay Adjustments > Time & Attendance). Now, your Payroll practitioner can review the data, modify it, or delete the data. If you need to make corrections, you should unlock the Time & Attendance pay cycle, make the changes, create a new export file, and then re-upload the data to Payroll before the payroll is submitted. This will ensure that your timecard data matches your payroll.
Transmitting the Payroll and Verifying Checks

Overview
Refer participants to the handout manual.
Say: You will learn about those tasks in your payroll training if you are responsible for processing payroll.

The Time & Attendance Workflow Process
Review the slide contents.
Say: To this point in the workflow, we completed stages one through four and ADP completed stage five by processing the payroll.
In stage six, we need to verify the payroll before starting a new payroll cycle.

Example
Review the slide contents.
Say: You can verify your checks and vouchers by using the reports you receive from ADP.

Important Information
Refer participants to the handout manual.
Transmitting the Payroll and Verifying Checks

Overview

After importing your payroll files, your Payroll practitioner will transmit your payroll to ADP and then verify the checks.

Important Information

- You should resolve any discrepancies before closing the current pay period and moving to the next pay period in Payroll.
- Once you have verified your checks, you are ready for the final task: moving to the next pay period in Time & Attendance.
Starting a New Pay Period

Overview

Review the slide contents.

The Time & Attendance Cycle

Say: Looking at the Time & Attendance Cycle, you'll see that you have completed six of the seven stages. You are now ready to move into stage seven.

Demonstration: Move to the Next Pay Period

Say: I will now demonstrate how to Move to the Next Pay Period. 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: Once the Payroll practitioner submits the payroll and starts a new pay cycle in Payroll, you are ready to move to the next pay period in Time & Attendance. Before moving to the next period client should make sure payroll is completed successfully.

Activity: Move to the Next Pay Period

Guide the class through the activity
Starting a New Pay Period

Demonstration: Move to the Next Pay Period

We will now demonstrate the process of moving to the next pay period.

Scenario

Once the Payroll practitioner submits the payroll and starts a new pay cycle in Payroll, you are ready to move to the next pay period in Time & Attendance. Before moving to the next period client should make sure payroll is completed successfully.

Activity: Move to the Next Pay Period

Starting point: Process > Time & Attendance > Move to Next.

<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Start Preparation</strong> for the locked pay cycle. &lt;br&gt;&lt;b&gt;Result:&lt;/b&gt; The Prepare for Payroll steps begin to run automatically and stop at the last step if no exceptions or errors are found. In the last step, the Move to Next Period page displays.</td>
</tr>
<tr>
<td>2</td>
<td>Select <strong>Process &gt; Time &amp; Attendance</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Move to Next Period</strong>. &lt;br&gt;&lt;b&gt;Result:&lt;/b&gt; The Action column status changes to Start Move.</td>
</tr>
<tr>
<td>4</td>
<td>Click <strong>Start Move</strong> for Pay Cycle. &lt;br&gt;&lt;b&gt;Note:&lt;/b&gt; The application may take a few minutes to process the information. &lt;br&gt;&lt;b&gt;Result:&lt;/b&gt; The pay cycle status changes to Open, and the current period reflects the new pay period dates.</td>
</tr>
<tr>
<td>5</td>
<td>Click on <strong>Check Box</strong> &quot;All timecard data has been verified...&quot; &lt;br&gt;&lt;b&gt;Note:&lt;/b&gt; A warning is displayed in red warning This step is irreversible. &lt;br&gt;&lt;b&gt;Result:&lt;/b&gt; The Move to Next Pay Period button is enabled.</td>
</tr>
<tr>
<td>6</td>
<td>Click <strong>Move to Next Pay Period</strong> &lt;br&gt;&lt;b&gt;Result:&lt;/b&gt; On the Pay Cycle the status changes to &quot;Move Pending&quot;</td>
</tr>
</tbody>
</table>
Knowledge Check

Instructions

Say: Let’s see how much you can remember about this topic.

The knowledge check tests your understanding of the topics we’ve just discussed. Refer to the handout manual if needed, but do not spend too much time on any one question.

Refer participants to the handout manual and have them complete the knowledge check. Review questions and answers with participants.

This topic spans four slides.

1. Which of the following are types of exceptions? (Select all that apply.)
   a. Missing supervisor approval
   b. Missing out punch
   c. Clocked out early

2. How do you allocate time to pay code?
   c. Click in the Pay Code field to display the magnifying glass icon and search for the pay code.
   d. Double-click in the pay Code field to display a list of pay codes, and select the appropriate code.

3. Which is the best method for fixing exceptions when you want to fix all missed punches?
   d. Fixing exceptions by type
Knowledge Check

Answer the following questions. Select all answers that apply.

1. Which of the following are types of exceptions? (Select all that apply.)
   a. Missing supervisor approval
   b. Missing out punch
   c. Clocked out early

2. How do you allocate time to pay code?
   a. Click the Timecard icon button to create a second row.
   b. Right-click in the Time Out field and select the appropriate pay code.
   c. Click in the Pay Code field to display the magnifying glass icon and search for the pay code.
   d. Double-click in the pay Code field to display a list of pay codes, and select the appropriate code.

3. Which is the best method for fixing exceptions when you want to fix all missed punches?
   a. Editing punches
   b. Editing hours
   c. Fixing exceptions by employee
   d. Fixing exceptions by type
Module 2: Debrief

[Insert question.]
**Answer:** [Insert answer.]

1. [Insert question.]
   **Answer:** [Insert answer.]

2. [Insert question.]
   **Answer:** [Insert answer.]

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

**S:** (Share) How comfortable do you feel about preparing for payroll?

**I:** (Interpret) What are some important points you remember about preparing for payroll?

**G:** (Generalize) How would you summarize what we've just discussed?

**A:** (Apply) How will you remember what to do?

---

**Summary**

**Topics**

*Review the slide contents.*

**Say:** In this module, the following topics have been explored:

- Preparing Time & Attendance Data for Payroll
- Starting a New Pay Period
Module 2: Debrief

1. How comfortable do you feel about preparing for payroll?
2. What are some important points you remember about preparing for payroll?
3. How would you summarize what we've just discussed?
4. How will you remember what to do?

Summary

In this module the following topics have been explored:

- Preparing Time & Attendance Data for Payroll
- Starting a New Pay Period
Time & Attendance
for ADP Workforce Now®
Module 3: Course Closing

Automatic Data Processing, LLC.
ES Canada
Support after Class

Additional Online Resources

*Review the three different online support mechanisms.*

*Refer to the handout manual.*
Support After Class

Additional Online Resources

ADP has multiple locations to access online resources:

- The ADP Client Service Centre:
  - This is an online repository where clients can locate various types of information.

- The Bridge:
  - This is an ADP sponsored online community for ADP clients to share knowledge, skills and have questions answered by client/ADP within the community.

- Workforce Now Support Centre:
  - This is an online tool built directly into Workforce Now. The tool is designed to provide users with:
    - Step-by-Step procedures
    - Online documentation regarding a variety of subjects
    - Learning Bytes on a variety of subjects

Let's us take a look at how each of these valuable resources can be accessed.
ADP Client Service Centre

Review the Client Service Centre overview with the class

Accessing and Navigating in the Client Service Centre

Guide the class through the access and navigation process.
### ADP Client Service Centre

The ADP Client Service Centre is an online resource available to all ADP clients. Users can access a multitude of resources using this tool:

- The Year End service centre, including reference materials and forms
- Welcome Packages, training manuals, Learning Bytes and online registration
- Health Tracking Program for clients who have purchased ADP Benefits
- Online support and service options.

### Accessing and Navigating in the Client Service Centre

<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>1</td>
<td>Use your Internet browser to log into <a href="http://www.adp.ca">www.adp.ca</a>.</td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Client Service Login</strong>, located in the upper-right corner of the page.</td>
</tr>
</tbody>
</table>
| 3    | Enter your company code and email address, and then select **Login**.  
**Result:** The **Client Service Centre** home page displays. |
| 4    | Let's locate the Workforce Now registration area within the **Client Service Centre**.  
**Select the** **Learning Bytes** link located under the title **Training**.  
**Results:** The **Welcome to the Learning Bytes Library** page appears, and the Learning Bytes section expands to display all products that have learning bytes. |
Workforce Now® Support Centre

Review the following with the class:

Users have access to this tool 24/7. This tool provides a variety of online tools:
- Step by Step instructional information.
- Learning Bytes (short 2min instructional videos) on a variety of topics.
- Documentation providing the user with specific details about the topic searched.

Accessing and Searching within the Workforce Now® Support Centre

Guide the class through the process of accessing the Support Centre.
### Workforce Now® Support Centre

Users have access to this tool 24/7. This tool provides a variety of online tools:

- Step by Step instructional information.
- Learning Bytes (short 2-3 min instructional videos) on a variety of topics.
- Documentation providing the user with specific details about the topic searched.

### Accessing and Searching within the Workforce Now® Support Centre

<table>
<thead>
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<th>Step</th>
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<tbody>
<tr>
<td>1</td>
<td>Select the <strong>Support</strong> link, located on the top right of the screen.</td>
</tr>
</tbody>
</table>

2 Type **Performance** into the search field, and then select **Enter** or the "**Magnifying Glass"** icon to begin the search.  
**Result:** All topics with Performance in them will display.

3 Review the available resources.

**IF** you want to:

- Read documentation: Select **Documentation**, then select topic
- View Step by Step instructions: Select **Knowledge**, then select topic
- View Learning Bytes: Select **Learning**, then select topic

4 For this activity select the **Learning** tab and select the **Starting a Performance review**.  
**Results:** A second window will open and the learning byte will play.

5 When completed, select the **Support** icon again to close.
The Bridge

*Review the overview located in the handout manual*

Benefits to Registering for The Bridge:

*Review the benefits with the class using the handout manual.*

Accessing and Registering for The Bridge

*Guide the clients through the process.*
The Bridge

The Bridge is sponsored by ADP, and is an exclusive online community for ADP clients. This community connects HR and payroll practitioners from across Canada and provides an environment where users can ask questions, find answers, and network with peers. The community is free, always available, and is an excellent resource for support on a variety of subjects.

Benefits to Registering for the Bridge:

- Allows payroll practitioners and HR professionals like you to connect, engage and share information in an easy-to-use, fully accessible online forum.
- Acts as an additional resource for support, frequently asked questions and information for ADP clients of all sizes using all products.
- Always on, for 24/7/365 access anywhere in Canada.
- Easy to use.

Accessing and Registering for the Bridge

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</tr>
<tr>
<td>3</td>
<td>Enter your company code and email address, and then select Login.</td>
</tr>
</tbody>
</table>
| 4 | Select The Bridge, from the menu on the left.  
Result: An overview of what the bridge is displays. |
| 5 | Click the Visit The Bridge link located at the bottom of the overview to register. |

The Bridge Registration/Login Page
Course Closing

Summary

Say: This course prepared you to use ADP Workforce Now in order to maintain employee time and attendance information and perform various tasks to create, update and process time information.

Course Objectives

Let’s look at the course objectives. As I read them, write down the objectives that you feel have not been met or the tasks that you still feel unsure about. Please include this information in your evaluation.

Training Evaluation

Say: Thank you for attending this course, we look forward to seeing you in the future. Your feedback is vital to continuous improvement. Please take a moment to complete our short evaluation so that we can continue to provide you with high quality training programs.

If this is a VC, do the following:

Select Training Evaluation.

If this is an ILT, instruct participants as follows:

- On your desktop, click the Training Evaluation icon and select the Time & Attendance for ADP Workforce Now® evaluation form.

For all classes:

At the top of your evaluation, you should see the name of the course Time and Attendance for ADP Workforce Now®. Please confirm that the information on your evaluation is correct.

The first page asks for some profile information:

- In the Company Name field, enter your company name.
- In the Company Code field, enter your company code.
- In the Instructor field, select [insert your name here]. You can enter the first letter of my name to move directly to that section of the list.

If you do not have any of the profile information, raise your hand.

If participants have any questions about the final question on the evaluation that directs them to the sales lead Web site, instruct them as follows for information about how this site functions and what they can expect:
Course Closing

Summary
This course prepared you to use ADP Workforce Now in order to maintain employee time and attendance information and perform various tasks to create, update and process time information.

Course Objectives
You now have the skills to:
- Maintain Employee Timecards
- Prepare Time & Attendance Data for Payroll
- Start a New Pay Period
- Access Support after Class

Training Evaluation
Thank you for attending this course, we look forward to seeing you in the future.
Your feedback is vital to continuous improvement. Please take a moment to complete our short evaluation so that we can continue to provide you with high quality training programs.