PAYROLL SERVICES
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WorkForce Manager Functions

This guide will cover the functions required for managers when navigating the WorkForce Time & Attendance software.

NOTICE: Falsification of timesheets, whether submitting or approving, can be grounds for immediate termination.

Table of Contents

About This Guide

This guide covers the most commonly used functions in WorkForce Time & Attendance.

Access to WorkForce T&A is browser based and can be accessed through the URL https://time.ou.edu.

Objectives

This guide will explain the responsibilities of managers as well as how to:

- Log into WorkForce and navigate through the application as a manager.
- Edit employee timesheet information
- Review bank balances and pay calculations
- Approve and amend employee timesheets
- Process time-off requests
- Perform end-of-period processes as a manager
- Delegate your privileges to others
- Generate reports

Conventions

This guide uses the following notational conventions to enhance clarity:

- **Bold text** depicts tab labels, menu names, policy labels (Pay Codes), function buttons (e.g. **Submit Timesheet** button), and computer keyboard keys (e.g. press **Enter**).
- **Bold text** followed by the right arrow symbol (→) depict hierarchical choices in menus. (e.g. **Main Menu → My Timesheet**).
- ***Bold italics*** represents field labels (e.g. ***Effective Date*** field).

Bordered text depicts notes, cautions, and warnings.

Supervisor’s Responsibilities

Supervisors play a critical role in ensuring the accuracy and compliance of employee timekeeping. Responsibilities include:

- **Timesheet Review and Approval**
  Review, edit, and correct all timesheet entries for delegated employees prior to payroll deadlines as communicated via the payroll website and email.
- **Leave Request Management**
  Review and approve employee leave requests promptly upon submission to ensure timely and accurate recordkeeping.
- **Prior Period Adjustments**
  Investigate, amend, and approve prior-period timesheets as soon as discrepancies or errors are identified.
- **Compensatory Time Oversight**
  Enter, review, and approve compensatory time in accordance with established departmental guidelines and policies.
- **Employee Support and Guidance**
  Address employee questions regarding the WorkForce Time & Attendance system to the best of your ability before escalating issues to the departmental payroll coordinator.

Home Screen Navigation

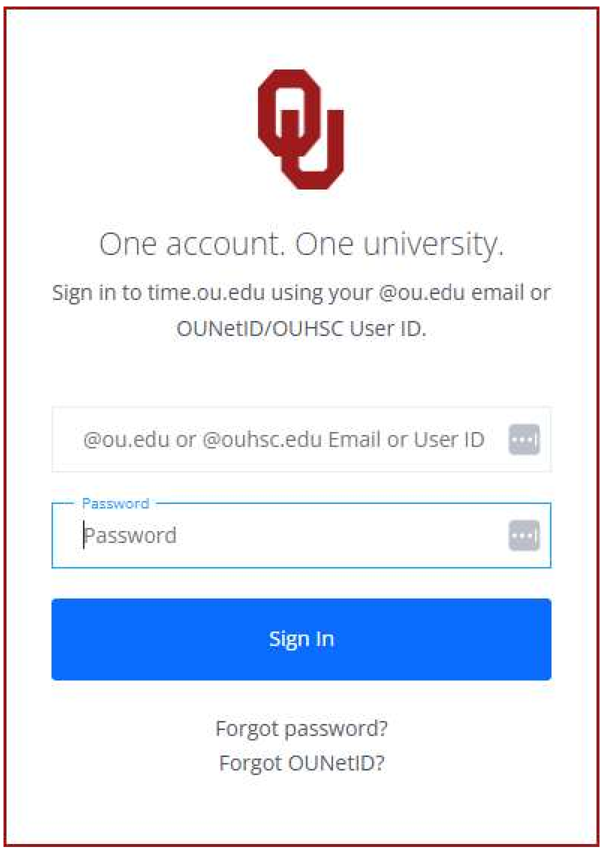
The WorkForce T&A software can be accessed through a web browser at https://time.ou.edu to perform functions such as entering time, time-off requests, work schedules, FMLA requests, and leave balance review.

To enter time, an hourly employee might access WorkForce in one or more of the following ways:

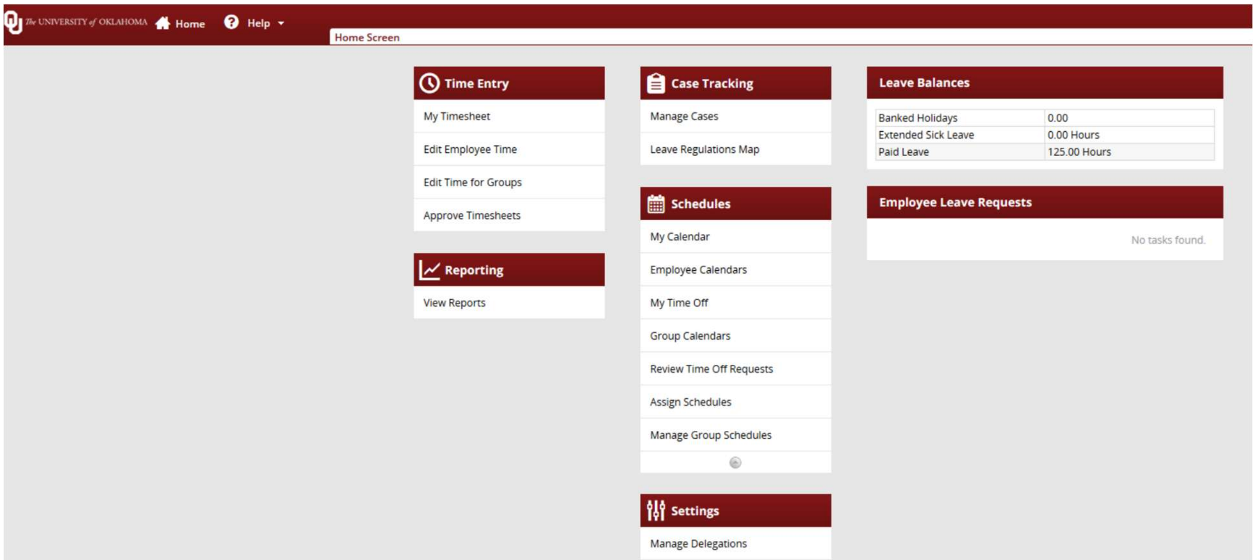
- Browser-based WebClock interface on a personal computer or kiosk
- WorkForce Mobile on personal or university phone
- Physical Timeclock

Logging into the Home Screen

1. Log into WorkForce by entering your OUNetID and Password into the login window.



2. The **Home Screen** appears. Below is an example of the Home Screen.



The **Home Screen** provides links to the following Time & Attendance related functions. The functions on the **Home Screen** may vary from those described based on the manager's security and access.

Actions

- **My Timesheet:** View, enter, and update timesheet data.
- **My Time Off:** Submit time off requests, track the status of requests, and view past request history.
- **My Calendar:** Shows the personal calendar which displays events such as time off, pending time off, and holidays.
- **View Reports:** WorkForce includes reports for both employees and managers. Managers can access general reports to view timesheet information for a certain period, roles delegated to them, and comments on timesheets.

Customizing the Home Screen

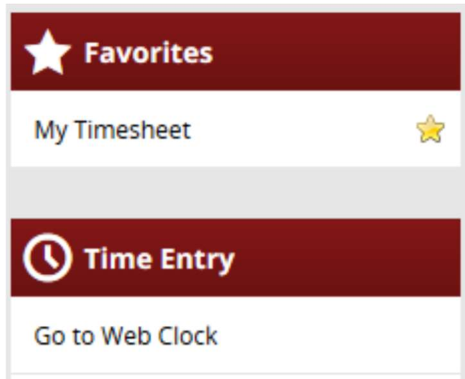
WorkForce supports the following Time & Attendance Home Screen customizations:

Rearranging Function Links

To rearrange the order in which functions appear within a category, click and drag the function button.

Creating a Favorites Category

Hover the mouse pointer over the function's star icon and click to move the function to the **Favorites** category of the **Home Screen**.



Removing a Function from Favorites

Hover the mouse pointer of the respective function button in the **Favorites** category and click the star icon. The function will return to its original category

Online Help

Once logged into WorkForce, you have access to online documentation for **Time** and **Absence Compliance** through the **Help** link.

The **Time** and **Absence Compliance** link opens the online help options in a new browser window. It contains useful documentation about employee and manager tasks.

The Dashboard

The functions available on the WorkForce dashboard depend on the type of role of the user. The dashboard of a manager offers functions that are not available to non-management employees. These functions assist managers in handling the time and attendance data of their employees. Managers can utilize these options to edit and approve timesheets, assign schedules, and review employee time off requests.

Dashboard Functions

The functions accessible from the dashboard are arranged in groups of related tasks referred to as categories.

Time Entry

- **My Timesheet:** View, enter, and update personal timesheet data.
- **Edit Employee Time:** View and edit delegated employee timesheets.
- **Edit Time for Groups:** Add and edit time entries for a group of assignments. (This is not a commonly used feature).
- **Approve Timesheets:** Approve timesheets for delegated employees. Timesheets can be approved individually or in groups.

Reports

- **View Reports:** Generate general reports to view timesheet information over specified time periods, delegated roles, and comments on timesheets.

Schedules

- **My Calendar:** View the personal calendar.
- **Employee Calendars:** View the calendars of delegated employees.
- **My Time Off:** Submit personal time off requests, track the status of personal requests, and view a history of past personal requests.
- **Group Calendars:** View calendars for delegated groups.
- **Review Time Off Requests:** Approve and reject delegated employee time off requests.
- **Assign Schedules:** Assign schedules or schedule cycles to delegated employees.
- **Manage Group Schedules:** Add and edit schedules for groups of employees.

Settings

- **Manage Delegations:** Delegate roles to another user.

Timesheet Components

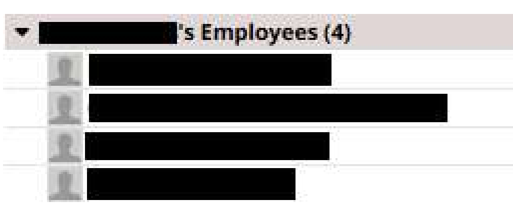
When viewing and editing individual employee timesheets or schedules, the work area of the manager's window resembles the work area of an employee's window and includes buttons that perform similar tasks.

Timesheet Window Buttons

Button	Button Function
« »	The **Minimize** button lets you hide the assignment tree. When hidden, the button toggles to a **Maximize** button.
Prev Next	The **Prev** and **Next** buttons move you to the previous or next record available based on the selection criteria.
Find	The **Find** button locates records based on a common set of search criteria. To sort search results, click the top of any column in the **Find Employees** window.
Sort	The **Sort** button arranges employee records by **Last Name**, **First Name**, or **Employee ID**.
[redacted]	The **Work Period** buttons display the date range for the current timesheet. The **Right Arrow** and **Left Arrow** buttons will cycle through the timesheets in chronological order. The **Calendar** button opens a pop-up calendar to select a timesheet for a specific day.

Accessing Delegated Timesheets by Group

1. Access the timesheets by navigating to **Time Entry → Edit Employee Time.**
2. From the **Assignments** section on the left side of the page select an assignment group to reveal the list of employees.
3. Click on an employee's name to open their timesheet.

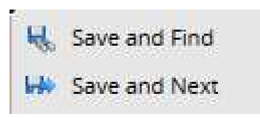


Selecting a Period and Save Options

1. To set the date click on the **Calendar** button to access the pop-up calendar.
2. Select the desired period by either:
    a. Clicking the desired date.

b. Selecting the **Default Period** button to navigate to the current period.
c. Selecting the **Today** button to navigate to the period containing today's date.

3. After changes are made to the timesheet, the changes must be saved using the **Save** button. Clicking the **Save** button will save the timesheet and perform no additional actions. Clicking the arrow next to the button will reveal a pop-up menu with the following buttons:
    a. The **Save and Find** button will save the employee's timesheet, close it, and open the **Find Employees** pop-up window.
    b. The **Save and Next** button will save the employee's timesheet and navigate to the next timesheet in the selected group.



Finding Timesheets

Use the **Find** button to quickly locate the timesheet for an employee based on specific search criteria.

1. Click the **Find** button to display the **Find Employees** pop-up window.
2. Enter the search criteria. Employees can be found by searching for ***Last Name***, ***First Name***, or ***Employee ID***.
3. Click **Search** to find the records or click **Cancel** to exit the pop-up without searching.
4. When the search is completed, the **Search Results** section will expand with a table containing all delegated timesheets for the employee. Results can be sorted by clicking the top of any column in the table.

Sorting Employee Records

Employee records can be sorted by selecting the **Sort** button. Records can be sorted by ***First Name***, ***Last Name***, or ***Employee ID***.

Navigating Timesheets

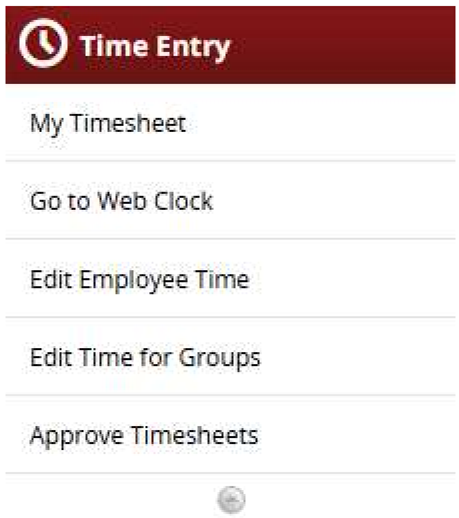
- Fields on the timesheet can be navigated through using **Tab** and **Shift + Tab.**

- The **Messages** tab on the bottom panel displays system-generated messages related to the timesheet.
- The **Results** tab shows a pay summary of the timesheet.
- The **Schedule** tab displays the employee’s work schedule if applicable.
- The **Time Off** tab displays the employee’s leave bank balances if applicable.
- At the top of the employee's timesheet, the **More** button provides options to print the timesheet.

Reviewing and Approving Timesheets

How to Access a Timesheet for Editing

1. Select **Time Entry → Edit Employee Time** from the Home Page. The **Manager Time Entry** window appears.



2. From the left sidebar, select an assignment group or an individual employee.
3. Select a timesheet for an employee in that assignment group to open it.

CAUTION: It is always recommended for a manager to return an errored timesheet to the employee to make the correction/change. There are some instances where the employee is unable to make the correction (ex. Timeclock/Web Clock punches) and the supervisor must update the employee's timesheet. In these instances, a comment must be added to the notes section of the corrected row to explain the change for record keeping purposes.

The **Manager Time Entry** window is laid out in the same way as your own timesheet.

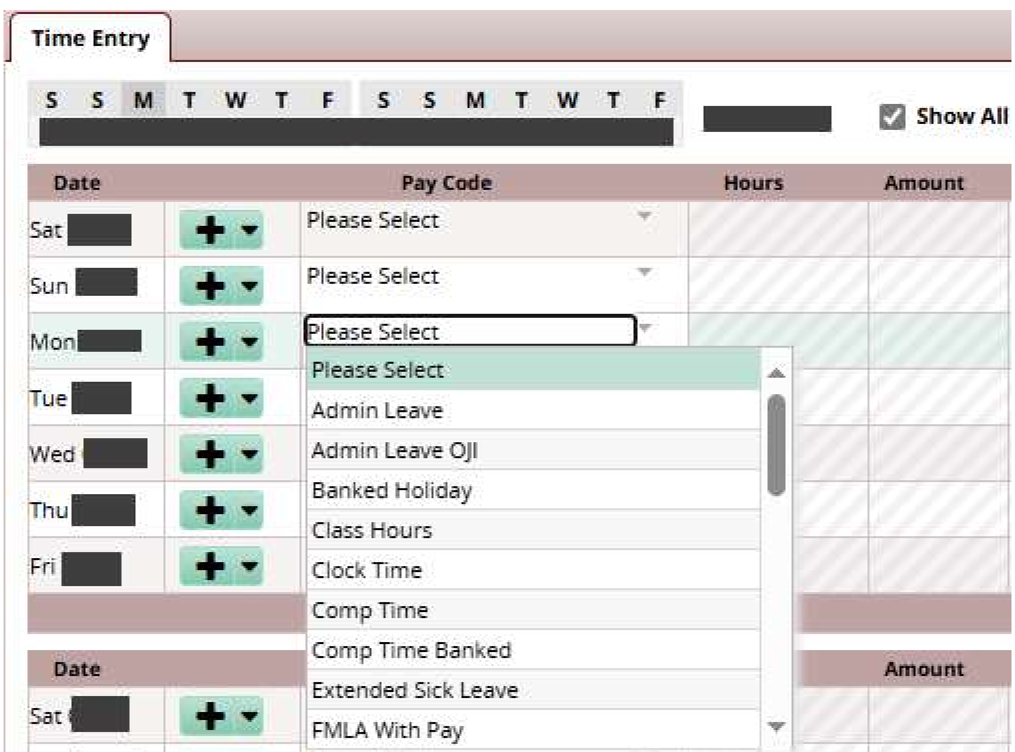
Using Pay Codes and Comments

A pay code is an entry-type identifier that is required for every row on a timesheet. Each pay code has an entry type like amount, elapsed time, or in/out time. Managers have access to pay codes that are unavailable to employees and can modify employee timesheets with several additional pay codes. The most common example is the **Clock Time** code. Employees cannot edit or add Clock Time. They must use the Web Clock or a Timeclock to add their time.

Pay codes such as **Paid Leave Scheduled**, **Comp Time Banked**, and **Extended Sick Leave** will decrease the employee's time off banks.

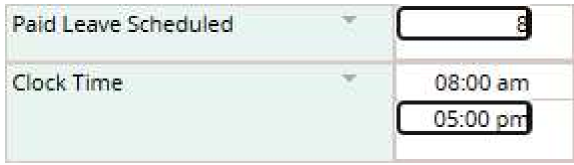
How to Add a Pay Code

1. To add a pay code, open an employee's timesheet using the steps in How to Access a Timesheet for Editing.
2. Find the day and click on the **Please Select** drop-down menu in the ***Pay Code*** column.



3. Enter the hours or time elapsed for the pay code. You are required to enter a comment in the ***Comments*** column describing what changes you have made for record keeping purposes.
    a. If an employee forgot to clock in/out, they will be unable to add the punch. Reach out to the employee to find out what time they should have punched and then add the missing punch by finding the day and typing in the time. The time entry will use the Clock Time Pay Code.

b. If an employee is unable to add their time off for whatever reason, the Pay Code: Paid Leave Scheduled or Paid Leave Unscheduled can be manually selected and the missing hours can be added to the ***Hours*** field.



How to add a Comment

The **Comments** field is used to enter details about a manually added pay code or a change made to an employee's timesheet.

1. To add a comment, open an employee’s timesheet in **Manager Time Entry (Time Entry → Approve Timesheets).**
2. Select the ***Comments*** field in the desired row of the entry and add the comment.

3. Make sure to save the timesheet for the comment and changes to be applied.

Dealing with Exceptions and Errors

An exception is a conflict between time entered and the rules under which the timesheet is processed. Exceptions will produce messages on the **Messages** tab of the timesheet. Some messages are only informational and do not necessarily require any action; others will require a resolution before the timesheet can be submitted. Error level exceptions must be corrected before the associated pay can be issued.

The **Messages** tab will present the following information about the exception:

- Date of the exception
- Description of the exception
- Severity of the exception

- Any required action

If a time entry has an exception, a colored pin will appear next to the entry row. The color of the pin relates to the level of severity of the exception.

- **White:** Informational messages only
- **Yellow:** Warnings present
- **Red:** Errors present

By default, exception messages are displayed in decreasing order of severity. (Red -> White)

How to Handle Exceptions

1. Time entries associated with exceptions will have a colored pin.

2. Most exceptions will be warnings and informational. These most often require little to no action, just review.

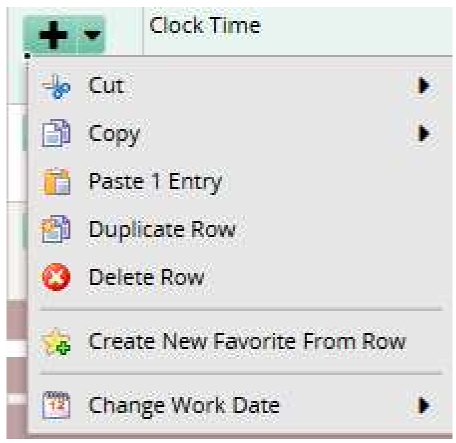
Date	Exception Message	Severity
Sun [redacted]	You forgot to add comments after editing employee's timesheet.	Error
Sat [redacted] - Fri [redacted]	45.0 hour(s) reported exceed 40.0 Standard Weekly Hour(s) for the week.	Warning
Mon [redacted] - Fri [redacted] (5)	9.0 hour(s) reported exceed 8.0 Standard Daily Hour(s) for the day.	Warning
Fri [redacted]	Overtime has been earned and can be banked as Comp Time. Up to 7.5 hours can be banked by entering or adjusting the Comp Time Banked pay code from [redacted] to [redacted]	Warning
Sat [redacted] - Fri [redacted]	Timesheet was modified by [redacted]	Info.

3. In the example above, the first message is red and is an error. To resolve the error, find the day mentioned in the ***Date*** column, make any necessary corrections, and add a comment to describe the changes made to that row. (comments are required for any changes made by anyone other than the employee)
4. The three yellow warning messages don't require any action to be processed on the payroll and are simply providing information of time entries that are abnormal such as working more than scheduled hours or working overtime. However, in the example image provided above, the final message about Comp Time should be followed if required by department regulations. See the section on Comp Time for how to bank it.
5. The white message is informational and requires no action. These will pop up if a timesheet is edited by someone other than the employee among other things.

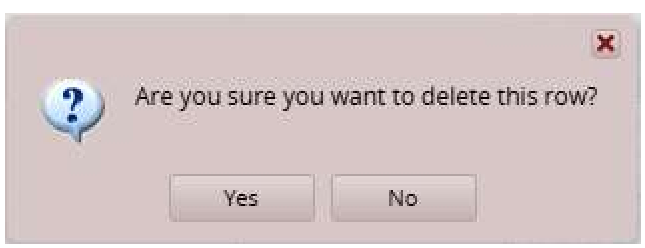
How to Delete a Time Entry

1. To delete a time entry, open an employee's timesheet in **Manager Time Entry (Time Entry → Approve Timesheets).**
2. Deleting a single day's time entry can only be done from **List View.** If in **Table View**, select the **List View** button at the top of the employee's timesheet.

3. Click on the green down-arrow next to the plus sign of the row that needs to be deleted to open the pop-up menu. It is also possible to right-click on the row to pull up the menu.



4. Select **Delete Row** to remove it from the timesheet.
5. A pop-up will appear to ask you if you are sure, click yes to confirm the deletion of the row.



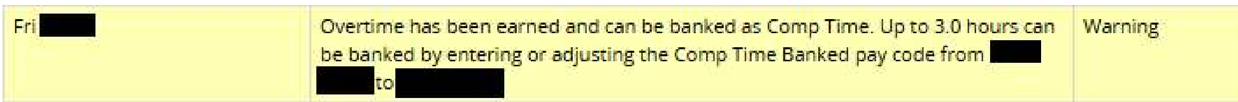
Comp Time vs Overtime

Depending on departmental policies, most overtime worked is accrued as Comp Time at a 1 ½ rate. Earned overtime can be stored by using the pay code **Comp Time Banked**.

This code should be entered on the Friday of the week in which overtime was earned as this is the last day of the weekly schedule.

How to Enter Comp Time

1. If an employee works more than 40 hours in a work week, a message will appear on their timesheet explaining that overtime has been earned, and it can be banked as Comp Time.



2. Add a new row to the Friday of the mentioned week and select the pay code **Comp Time Banked.**
3. Enter the hours mentioned in the warning. In this example, the employee worked 42 hours in the week which leads to 2 hours of overtime. Since Comp Time is at a 1 ½ rate to regular earnings, 3 hours of Comp Time should be entered.

4. Comp Time must be approved by a manager for the time to accrue to the employee's bank. If not approved, an employee's Comp Time will be paid out as overtime.
5. To approve an employee's Comp Time, click the checkbox in the warning.

6. The approval of Comp Time must be completed by the same deadline as the timesheet approval deadline for it to be banked, otherwise it will be paid out as overtime.

How to Use Banked Comp Time

1. To enter banked Comp Time, select the pay code **Comp Time** from the drop-down menu and enter the number of hours taken.

Sun [redacted]	+ ▾	Comp Time ▾	3.000
	+ ▾	Worked In/Out ▾	08:00 am
			01:00 pm

2. If the employee has multiple assignments, they can only use Comp Time for the department in which the hours were accrued.

Approving Timesheets

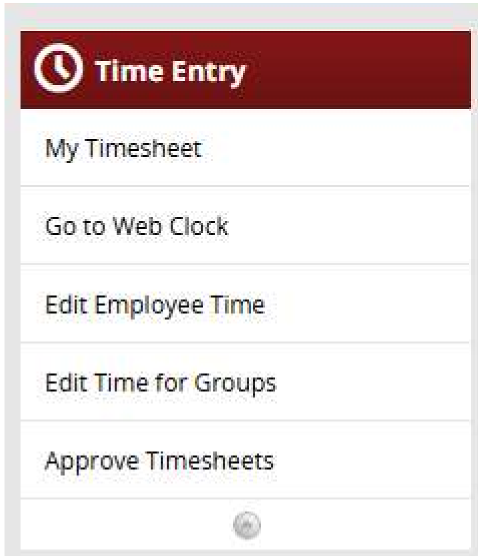
Managers can approve hours for individual employees or for an entire group. When reviewing employee hours, the system allows provides information on if an employee's timesheet contains any exception messages.

Timesheets with errors must be resolved before they can be approved. The timesheet can be opened and edited by the manager to correct the errors or rejected. When rejected the employee should be notified of any errors that they must correct. If there are a mixture of error-free timesheets and timesheets with errors, it is possible to approve only the error-free timesheets in a batch. The primary focus of approving or rejecting hours is to validate that the entered information is accurate and to eliminate errors.

CAUTION: It is always recommended for a manager to return an errored timesheet to the employee to make the correction/change. There are some instances where the employee is unable to make the correction (ex. Timeclock/Web Clock punches) and the supervisor must update the employee's timesheet. In these instances, a comment must be added to the notes section of the corrected row to explain the change for record keeping purposes.

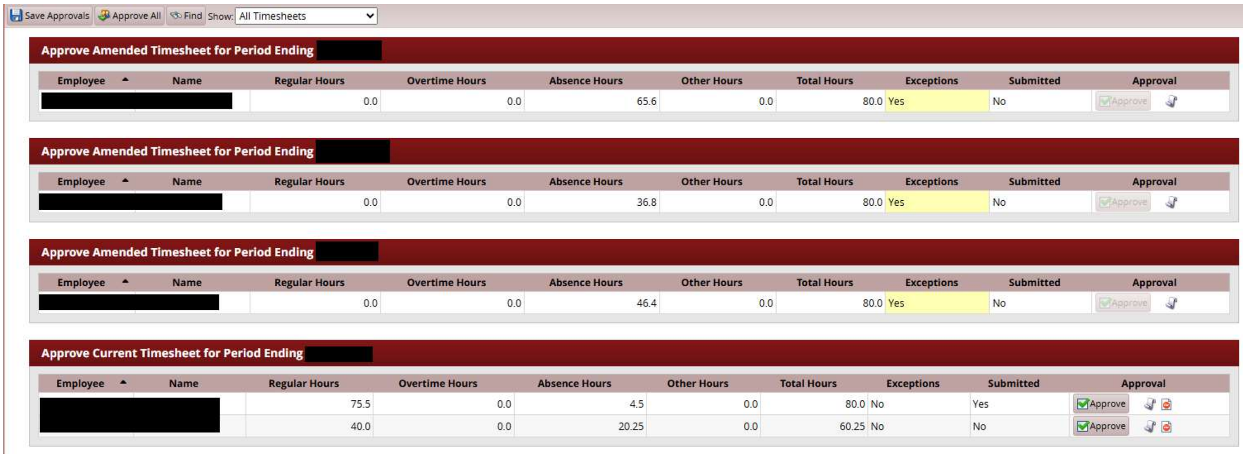
How to Approve a Timesheet

1. To approve a timesheet, select **Time Entry** -> **Approve Timesheets.** The **Approve Timesheets** window will appear.

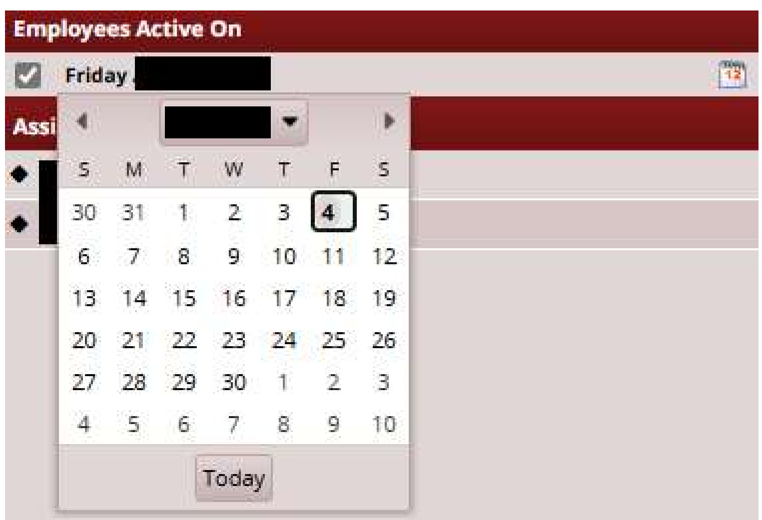


2. In the left sidebar, the assignment tree contains all delegated employees' timesheets sorted by group.

3. Clicking on a group will load a list of all the **Current** and **Amended Timesheets** for that group of employees.



4. Click on a timesheet to open up the **Manager Time Entry** screen in a pop-up window.
5. To view timesheets from a different pay period than the current pay period:
    a. Select the checkbox in the left sidebar next to the **As of Current Period** label. A pop-up will appear with a calendar.
    b. Select a different date. The timesheets will update to reflect the selected period.



    c. To return to the current period, un-check the box.
6. To approve an individual employee's hours, select the **Approve** checkbox in the ***Approval*** column. The **Approve** button for an accepted timesheet includes a green check mark. This is a toggle; clicking it again will undo the approval. The **Save Approvals** button must be clicked in order to save the change to the timesheets approval status.

7. If the timesheet data indicates that all timesheets have been submitted without any errors and exceptions have been validated, it is possible to approve all timesheets in the group at at once using the **Approve All** button.

NOTICE: It is the responsibility of the manager to review all delegated employees' timesheets to ensure accuracy, prevent time fraud, and ensure that the proper codes are used. It is highly recommended that group approval is only performed after all timesheets have been reviewed.

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8. If the timesheet data indicates a mixture of error-free timesheets and timesheets with errors, the error-free timesheets can be approved immediately by checking the **Approve** checkbox in the ***Approval*** column.
9. After reviewing and approving all required timesheets, click the **Save Approvals** button to save any changes to timesheet approval statuses.
10. Once a timesheet has been approved, it cannot be edited by the employee. If an employee needs to make any changes to their timesheet, the timesheet will need to be un-approved before changes can be made. This can be done by unchecking the **Approve** checkbox and saving.

How to Reject a Timesheet

Managers can reject timesheets with errors back to the employee for corrections.

NOTICE: Rejecting a timesheet for the current pay period does not prevent the timesheet from being processed on the payroll. It is the manager's responsibility to follow up on rejected timesheets to ensure they are accurate and ready before the timesheet approval deadline.

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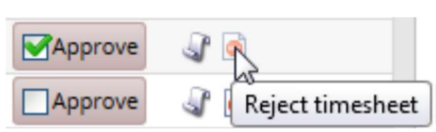
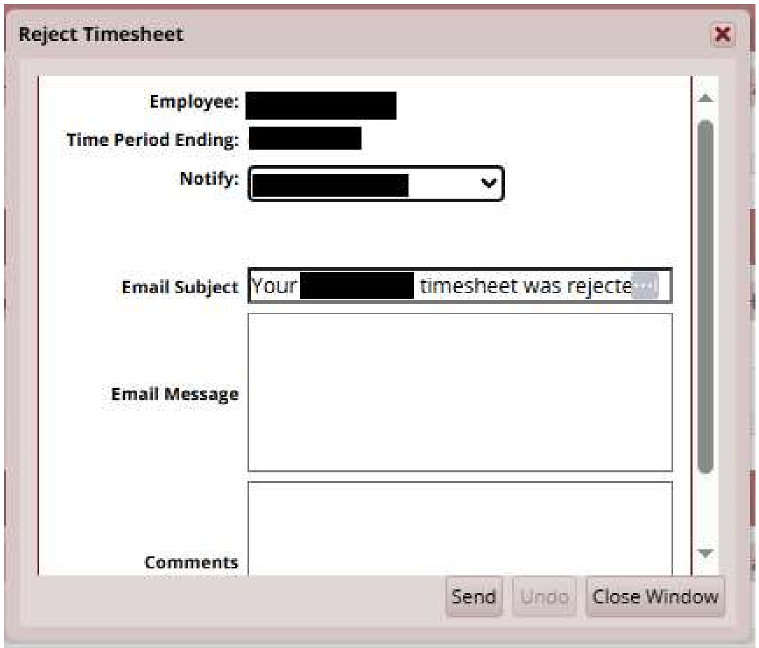
1. To reject a timesheet, click the **Reject timesheet** button in the ***Approve*** column. (The button looks like a sheet of paper with a red circle with a white dash on it.)



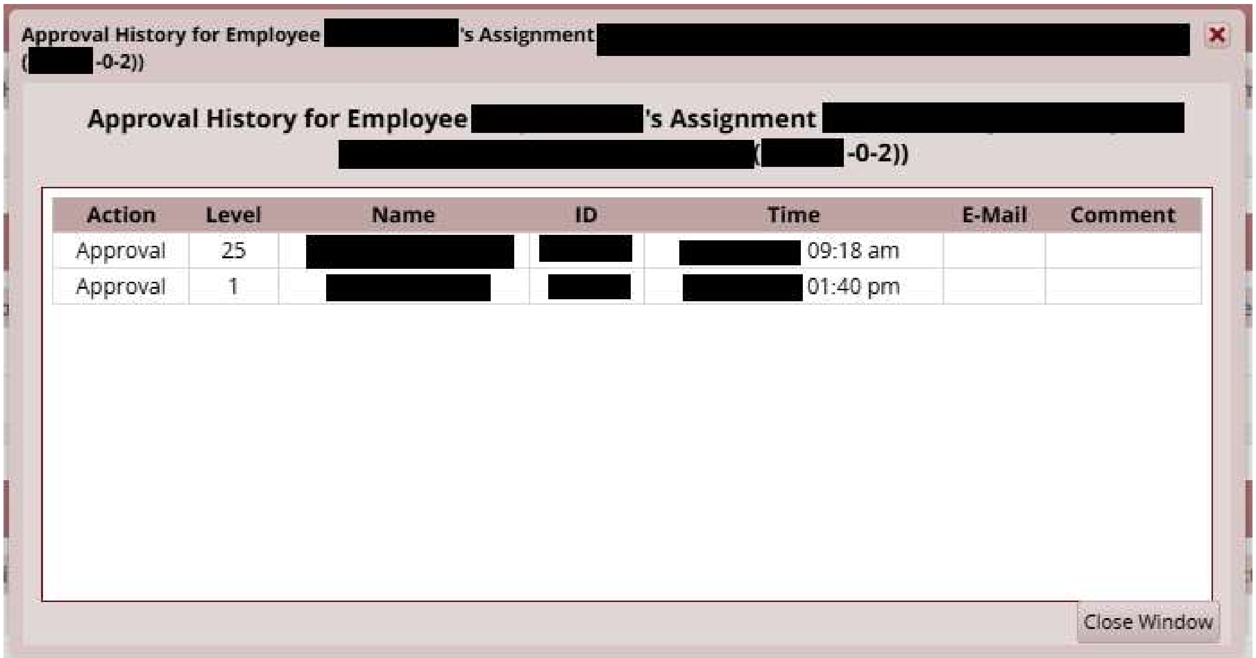
2. The **Reject Timesheet** window will appear. Fill out the email message and add comments if necessary. Then hit send to notify the employee about the rejection. Clicking **Close Window** will close the window without rejecting the timesheet.



3. Accidentally rejected timesheets can be undone by clicking the **Undo** button to return the timesheet to a neutral status. It will still need to be approved.
4. Once a timesheet has been rejected, the **Approve** button will have a red “X” in the checkbox and be marked out. Once the **Save Approvals** button has been clicked, the **Approve** button will no longer be marked out.

5. Clicking the **History** button will provide a pop-up window with the approval and rejection history for the employee’s timesheet. (The button looks like an open white scroll of paper.)

6. The **Approval History for Employee** window displays the actions taken, who took the actions, the date and time of the action, email messages sent, and comments made.



Amending Timesheets

Timesheet amendments are required when original entries contain errors or omissions. In general, employees are responsible for correcting their own timesheet entries. However, for non-exempt employees using Clock Time, any corrections involving missed punches must be made by a supervisor or designated timekeeper. Amendments can be submitted for dates up to one year prior to the current date.

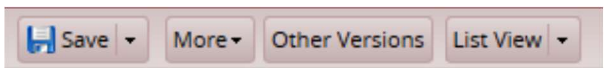
- Data from amended timesheets are not included in reports unless the amended timesheet has been approved.
- Amended timesheets must be approved by a manager or their delegate(s), before the timesheet approval deadline to be included on the next scheduled payroll.
- Any changes made to a timesheet that has already been paid will cascade through all timesheets up through the current pay period. The difference will be applied to the current pay and bank balances.
    - If a past timesheet is amended to account for a Paid Leave day that was entered as a work day, then that change – because it affects the Paid

Leave bank – is used to recalculate the bank balances for each successive timesheet up through the current pay period.

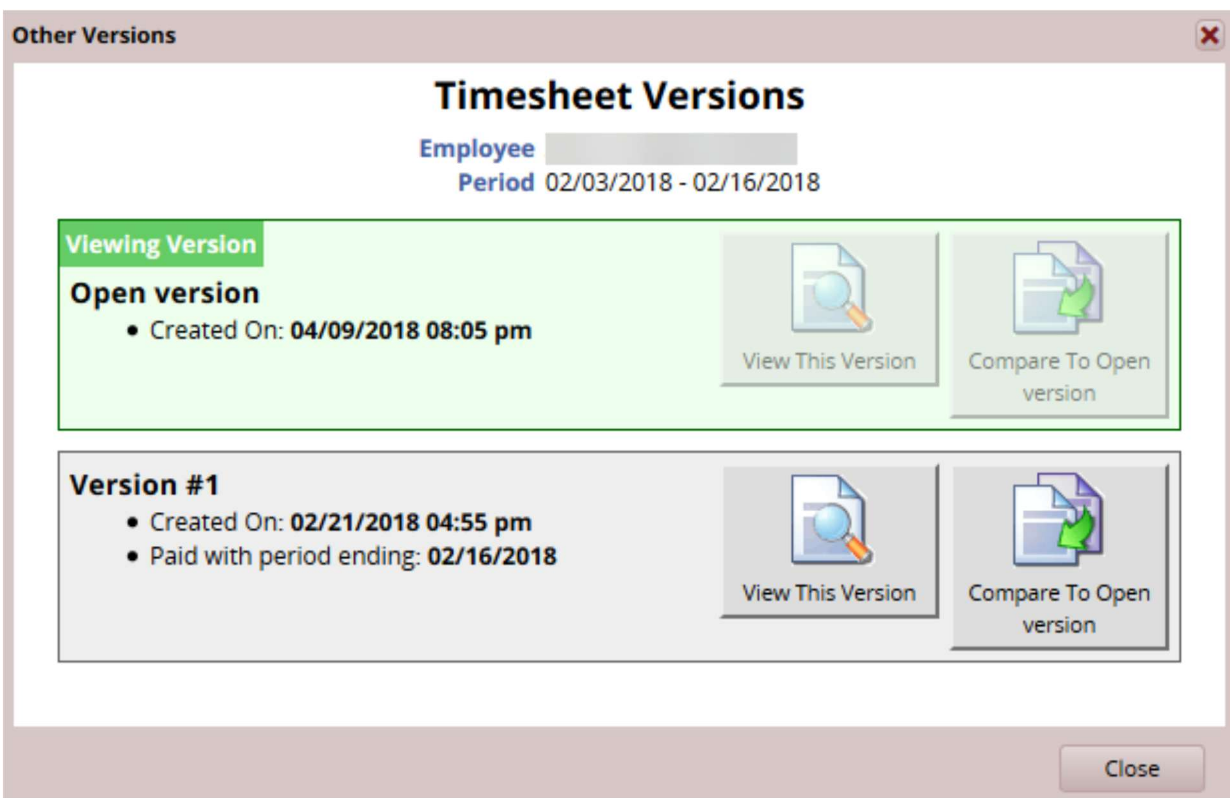
How to Amend a Timesheet

1. To amend a timesheet, navigate to the timesheet for the pay-period that needs amending.
2. Click the **Amend** button at the top-left corner of the window.

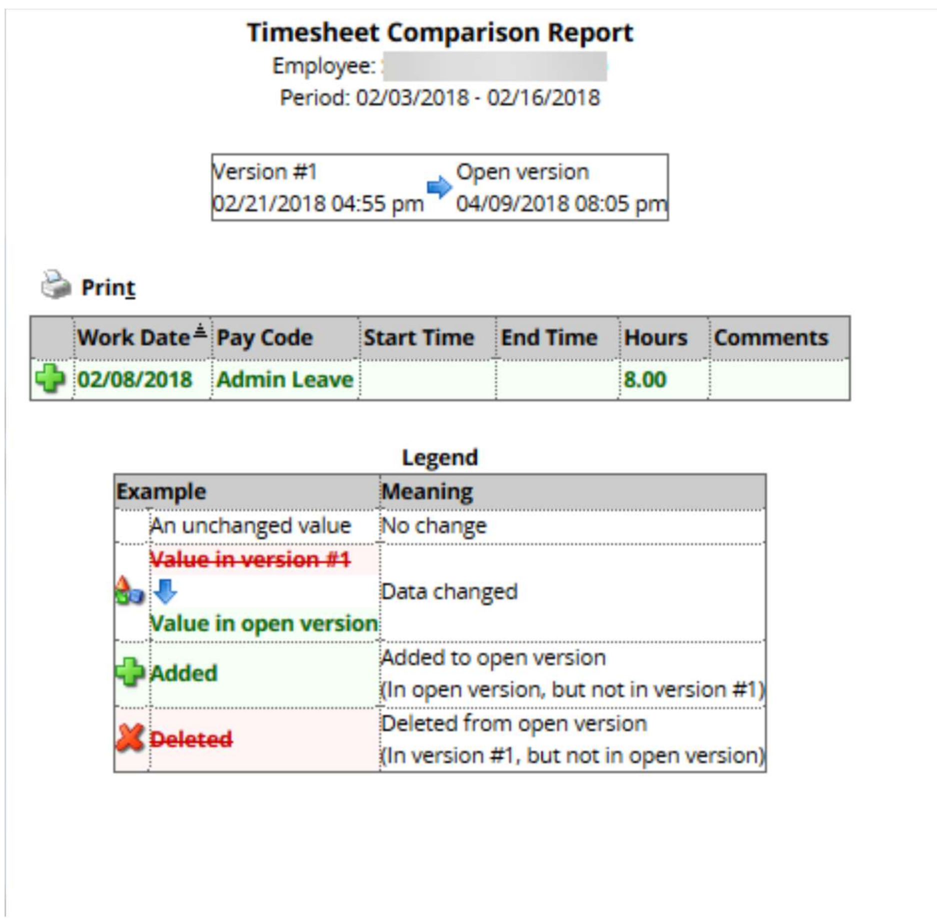
3. The timesheet will now be open for editing. Add the desired amendments and save them. The **Save** button is located in the top-left corner of the window.



4. Once the timesheet has been saved, the **Other Versions** button will appear next to the **Save** button. Clicking on it will open the **Other Versions** window with options to compare changes between the different versions of the timesheet.



5. Clicking **View This Version** on one of the versions will open that timesheet for view.
6. Clicking **Compare To Open Version** on one of the versions will list the differences between the selected version and the open one.
7. A pop-up menu will appear with the changes. Green lines are lines that are present in the open version but not in the original version. Red lines are lines that are not present in the open version but are in the original version. Black lines are lines that are the same between both versions.



8. After viewing the comparison, the results can be printed or the window can be closed to return to the timesheet.

Comp Time Banked & Amending Timesheets

Please Note: When amending a past timesheet in WorkForce, any **Comp Time** that has previously been banked and approved must be “re-acknowledged” by a manager after the amendment has been made; otherwise, the previous banked **Comp Time** will be paid out as overtime and subsequent pay period leave bank balances will be updated.

In addition, if an amendment increases or reduces the number of hours worked, the previous "banked" Comp Time will need to be updated in accordance to the new weekly total.

Rejecting Amended Timesheets

All timesheet amendments will remain on the "Approve Timesheets" screen until approved and processed during an active payroll cycle.

When an amendment is "rejected", the amended timesheet must be modified by the employee to correct the amendment for processing. When this is not an option, the department may make the necessary changes to correct the amendment for processing; however, when doing so, the department must retain sufficient documentation for why the change was not made by the employee directly.

Once the amended timesheet has been modified and approved, the changes (if any) will be processed on the next scheduled payroll as long as the approval was completed by the deadline. After it is processed, the amended timesheet will no longer appear on the Approve Timesheets screen.

Holiday and Administrative Leave

When the university is closed due to a **Holiday** or **Administrative Leave** (bad weather, icy roads, etc.) the applicable hours will be automatically added to all eligible employees' timesheets.

NOTICE: If the Administrative Leave is only for a partial day (e.g. closing early due to weather), the time will need to be manually added to the timesheet by the manager.

If an employee is required to work over a **Holiday**, depending on departmental policies, the Holiday hours can be banked on their timesheet for use at a later date.

Employees required to work during an **Administrative Leave** period cannot receive the **Administrative Leave**.

How to Bank a Holiday

1. Leave the **Holiday** hours populated and add the hours the employee worked for the day if not already there.
2. A message will appear in the **Messages** tab to acknowledge the time transfer to the employee's Holiday leave bank. Check the box in the ***Acknowledge*** column and save the timesheet. If the checkbox is not marked, the employee will receive the pay for the holiday hours and the time worked, and the holiday time will not be banked.

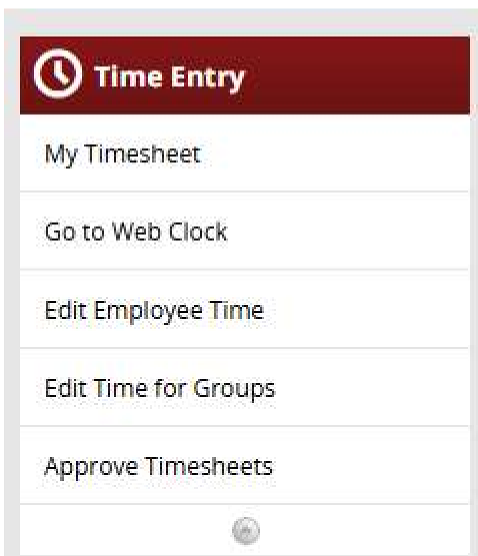
To use banked holiday time, select the **Banked Holiday** pay code and enter the number of hours taken. For more information on how to add pay codes, view the How to Add a Pay Code section.

Group Time Entry

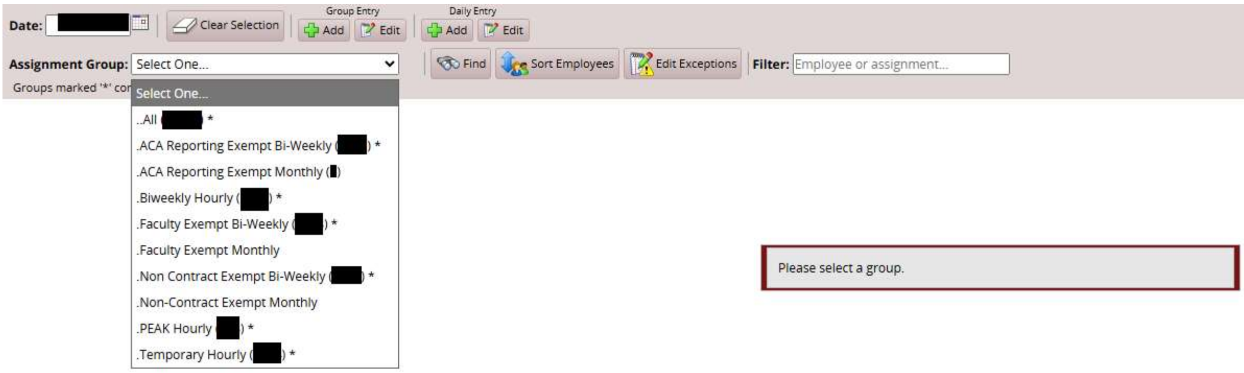
The **Group Time Entry** window allows managers to perform bulk time entry tasks for groups of employees. An entire or partial group of employees can be edited at one time. For example, it is possible to add a day of training to a group of employees in a division.

How to Edit Time for Groups

1. To display the **Group Time Entry** window, navigate to **Time Entry → Edit Time for Groups.**



2. The **Group Time Entry** window appears. Select the appropriate assignment group from the **Assignment Group** drop-down menu.



For large groups, only the first 100 members display. Use the filter button to refine your results.

3. Once the relevant information loads, a grid displays employee names, days, and dates.

Time entries associated with warning and error exceptions appear with a shaded background. Yellow indicates exception warnings and Red indicates error exceptions.

The grid's default view displays the current pay period. To choose a different pay period, select a date using the **Date** button in the top left corner.

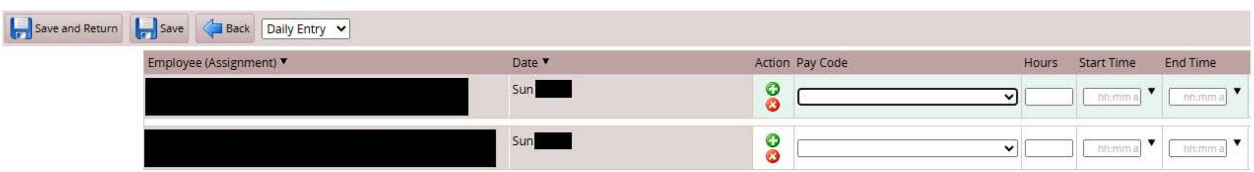
To apply a daily entry edit:

1. Select the entries that need to be modified.

- To select all dates in the time period for an employee, click the matching cell in the ***Employee*** column.
- To select a specific date for all members in the group, click the header cell of the column for the matching date.
- To select specific dates for specific members, click on each cell that needs to be edited.
- To select a range of cells, click the first cell in the range, and then, while holding shift, click the last cell in the range.
- To select multiple concurrent cells, click a cell and drag the mouse across the additional cells.
- Click the **Clear Selection** button to start over.

2. Select the **Daily Entry Add/Edit** option to apply different changes to individual employees. This mode is good for when changes need to be made to multiple employees for the same day, but each employee's times are different.

3. The selected employees will appear and each can be edited individually similar to the **Manager Time Entry** window. View How to Add a Pay Code for more details.



4. Make the necessary changes or additions.
   - Click the green **Insert** button to add time or schedule entries.
   - Click the red **Delete** button to delete time or schedule entries.
   - Use **Tab** or **Shift + Tab** to move between fields.
5. Once all changes are complete, make sure to save.
   - Click the **Save** button to save the changes.
   - Click the **Save and Return** button to save the changes and go back to the entry grid.
   - Click the **Back** button to exit the window without saving the changes.

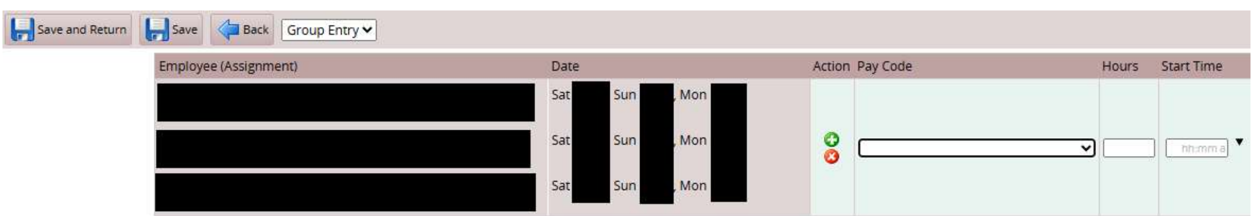
To apply a group entry edit:

1. Select the entries that need to be modified.

- To select all dates in the time period for an employee, click the matching cell in the ***Employee*** column.
- To select a specific date for all members in the group, click the header cell of the column for the matching date.
- To select specific dates for specific members, click on each cell that needs to be edited.
- To select a range of cells, click the first cell in the range, and then, while holding shift, click the last cell in the range.
- To select multiple concurrent cells, click a cell and drag the mouse across the additional cells.
- Click the **Clear Selection** button to start over.

2. Select the **Group Entry Add/Edit** option to apply different changes to individual employees. This mode is good for when the same time entry needs to be added to multiple days or employees.

3. The selected employee(s) and day(s) will appear and each can be edited individually similar to the **Manager Time Entry** window. View [How to Add a Pay Code]() for more details.



4. Make the necessary changes or additions.
   - Click the green **Insert** button to add time or schedule entries.
   - Click the red **Delete** button to delete time or schedule entries.
   - Use **Tab** or **Shift + Tab** to move between fields.
5. Once all changes are complete, make sure to save.
   - Click the **Save** button to save the changes.
   - Click the **Save and Return** button to save the changes and go back to the entry grid.
   - Click the **Back** button to exit the window without saving the changes.

Other Group Time Entry Tools

In addition to the standard tools used for working with multiple entries, the following options are available.

Button	Description
	Find a specific employee record or group of employee records.
	Arranges employee records in a specific order. Records can be sorted by Employee Number, Last Name, First Name, and Hire Date.
	Allows action to be taken on exceptions.

Find

1. Employee records can be found by either **Assignment Description**, **Employee ID**, **Last Name**, **First Name**, or **Middle Name**.

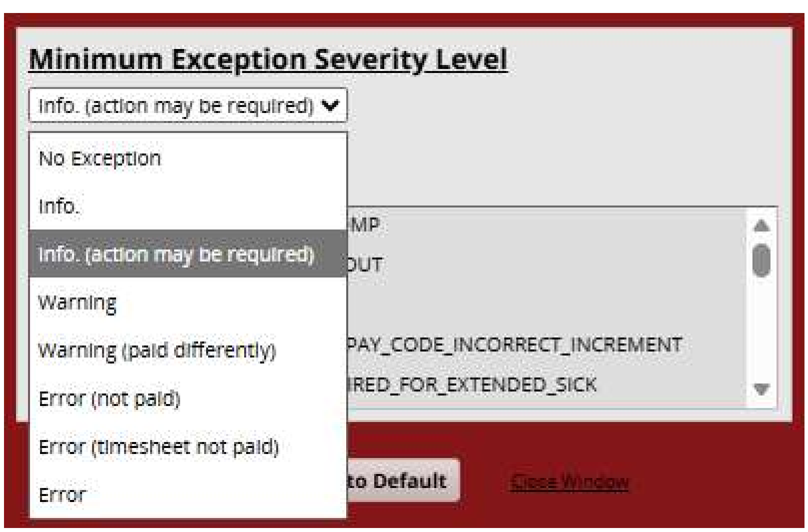
2. By using the **Asterisk (*)** partial results can be searched for. (e.g. "Jo*" will find all names that start with "Jo" such as Joe, John, and Jordan.

Sort Employees

1. In the list of sort options, arrange the options in the order by which the records will sort. (e.g. sorting by ***Hire Date*** and then by ***Last Name.***
2. Click **Sort** to use the sort hierarchy you have specified, or click **Close Window** to exit the pop-up without sorting.

Edit Exceptions

1. Select exceptions to modify by clicking the appropriate cells in the grid.
    - To select all dates in the time period, click the cell containing the employee (assignment) name
    - To select a specific date for all members in the group, click the cell containing the date (the column header).
    - To select specific dates for specific employee records, click the specific cells that need to be edited.
    - To select a range of cells, click the first cell in the range, and then hold down the **Shift** key and click the last cell in the range.
    - To select multiple concurrent cells, click a cell and drag the mouse across additional cells until all desired cells are selected.
2. Click the **Edit Exceptions** button. A new window opens for addressing and resolving exceptions.
3. To only see exceptions of certain types, do the following:
    - Click the **Exception Filter** button. The **Exception Filter** dialog box opens to let you select specific exceptions and to filter exceptions by severity level.



- From the **Minimum Exception Severity Level** drop-down menu, select the desired lowest level exception to show.
- In **Exception Codes**, specific exceptions can be selected so that only the checked exceptions are shown. By default, all exception codes are selected.

- Do one of the following:
  i. To save any changes, click **Save**. The **Exception Filter** dialog pop-up closes and the **Group Time Entry** window will display the filtered results.
  ii. To display all exceptions, click **Reset to Default.** The **Exception Filter** dialog pop-up closes and the **Group Time Entry** window will display all results.
  iii. To cancel any filter changes, click **Close Window.** The **Exception Filter** dialog pop-up closes and the **Group Time Entry** window will display the same results as before the pop-up was opened.

4. Make any necessary changes or additions.
5. Once all changes are complete, make sure to save.
   - Click the **Save** button to save the changes.
   - Click the **Save and Return** button to save the changes and go back to the entry grid.
   - Click the **Back** button to exit the window without saving the changes.

Generating Reports

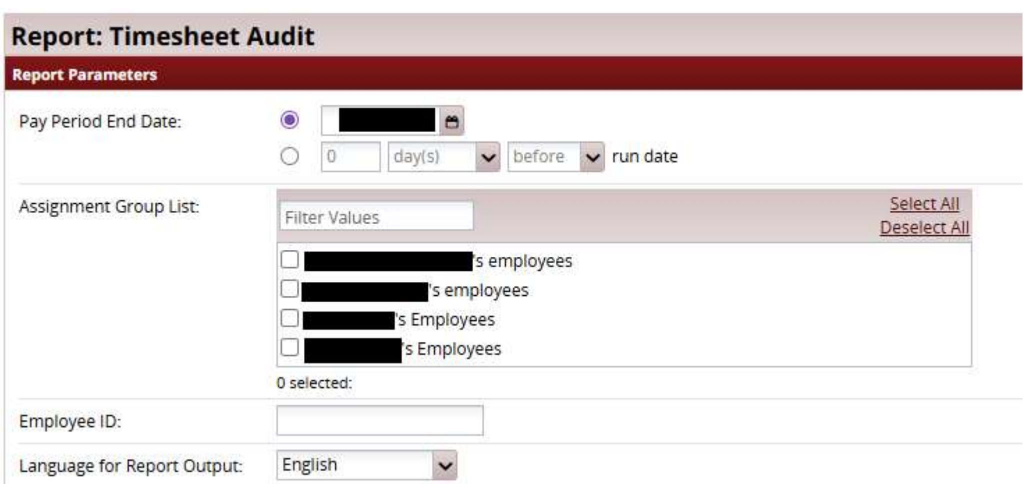
Managers access reports to view information about timesheets, schedules, and employees. Most reports are restricted to the manager's delegated assignment groups.

How to Run Reports

Reports provide specific information about select groups of employees.

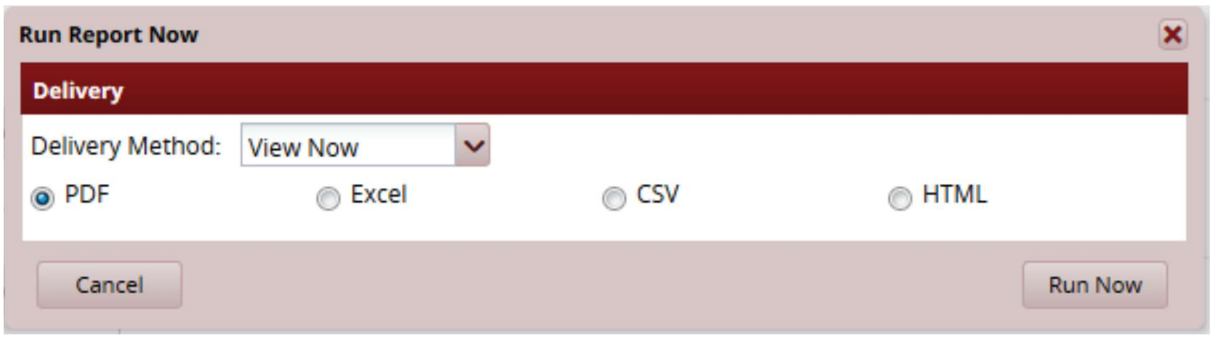
1. To view a report, select **Reporting → View Reports.** The **Reports** window appears.
2. To find a specific report, do one of the following:
    - Navigate to the report using the folders.
    - Select the report from the **Favorites** tab.
    - Use the **Search** button to find the report.

3. Select a folder. The field to the right will appear with the reports and sub-folders inside that folder.
4. Continue to navigate through subfolders if needed and select the desired report.
5. The report parameters will appear below the folders.



6. Complete the various fields for the report's parameters.

7. Once all parameters are filled out as desired, click the **Run Now** button. A pop-up will appear with options to select the output format for the report.
    - **PDF** to create and download a PDF file.
    - **Excel** to create and download an Excel document.
    - **CSV** to create and download a csv file.
    - **HTML** to open the report in another tab of the browser.



8. Click **Run Now** to process the report.