DAYFORCE
Getting Started

Manager Role

Dayforce Guide: Manager Role

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Review Time and Attendance

Dayforce's **Timesheets** feature provides a summary of your employees' time and attendance records. These records show when and where employees worked.

This section describes how to use the timesheet to review time and attendance records for a week, the meaning of the different icons used to label your time and attendance records, and the other information available on the timesheet, like problems, exceptions, pay summaries, and raw punches.

The main tasks involved with review your time and attendance are as follows:

1. Loading the timesheet for the week you want to review.
2. Following the timesheet legend to see which employees were absent.
3. Reviewing problems and exceptions.
4. Correcting any problems or discrepancies on the timesheet:
    a. Recording worked shifts for time employees worked but failed to record.
    b. Editing inaccurately recorded shifts that do not reflect when an employee actually worked.
5. Approving the timesheet by authorizing the worked shifts with accurate time and attendance records.

Load Timesheets

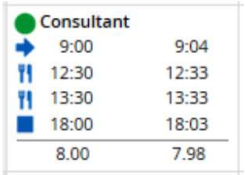
You can load your employees' time and attendance records in **Timesheets**. The application displays the records for your entire team, for the selected period.

Note: If you manage multiple locations, make sure you pick one location in your organization before you load any timesheets.

Once loaded, the timesheet lists your employees against the days of the week, creating a grid, so that each cell represents a single time and attendance record for a specific employee and date. With this view, you can quickly scan your employee's records for the week.

Within each cell, several pieces of information are displayed. Typically, you will see a set of times and a few icons.

The times either represent when the employee worked on that day, or, if the employee was absent or the date is in the future, they represent the employee's scheduled shift on that day. If there are hours on the left, those represent the scheduled hours; if there are hours on the right, those represent the shifts worked hours. At the bottom of the cell, the application sums the shift's hours unless there is a problem with the shift's details that prevent the application from adding up the hours. For more information, see **Review Problems and Exceptions**.



In this example, the times on the left indicate that the employee was scheduled to work for 8.00 hours, from 9:00 AM to 6:00 PM, with a 60-minute meal starting at 12:30 PM. The times on the right indicate that the employee actually worked 7.98 hours. They punched in for work at 9:04 AM and punched out at 6:03 PM. The green circle icon ( ) indicates that the shift was scheduled and worked. For more information, see **Timesheet Icons**.

Depending on the resolution of your monitor, all seven days on a timesheet may not be visible without scrolling to the right. The **Total** column is displayed in a locked position on the right of the timesheet, by default. To hide the displays of the **Total** column, click the hide icon (>>) next to the **Total** column, at the top right corner of the timesheet:

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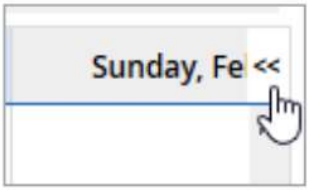
To display the **Total** column again, click the show icon (<<):



Navigating Between Weeks or Periods

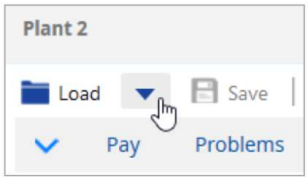
Once you have a timesheet loaded, you can quickly load the next or previous week or period by clicking the back and forward arrows at the top of the screen or by selecting the date in the drop-down calendar:

Load Timesheets for a Location

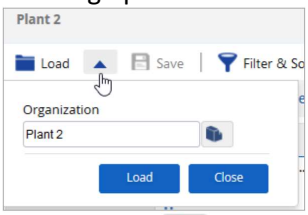
Before you can edit employee timesheets, you need to select the location that you want to view. You can select the location using the org picker at the top of the navigation panel, or you can use the new org picker located in the **Timesheets** load dialog box.

To select a location in the load dialog box, complete the following steps:

1. Navigate to **Timesheets**.
2. Click the arrow next to the **Load** button:



A dialog box opens displaying additional loading options:



3. In the **Organization** field, click the organization icon ( ) to select your organization:

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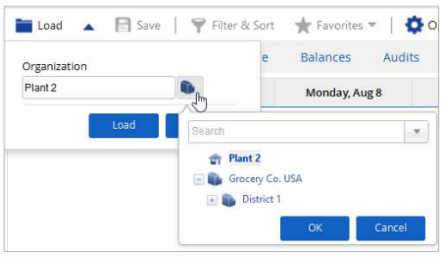


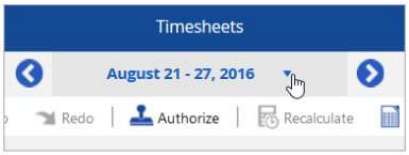
The application displays all of the location that you can access.

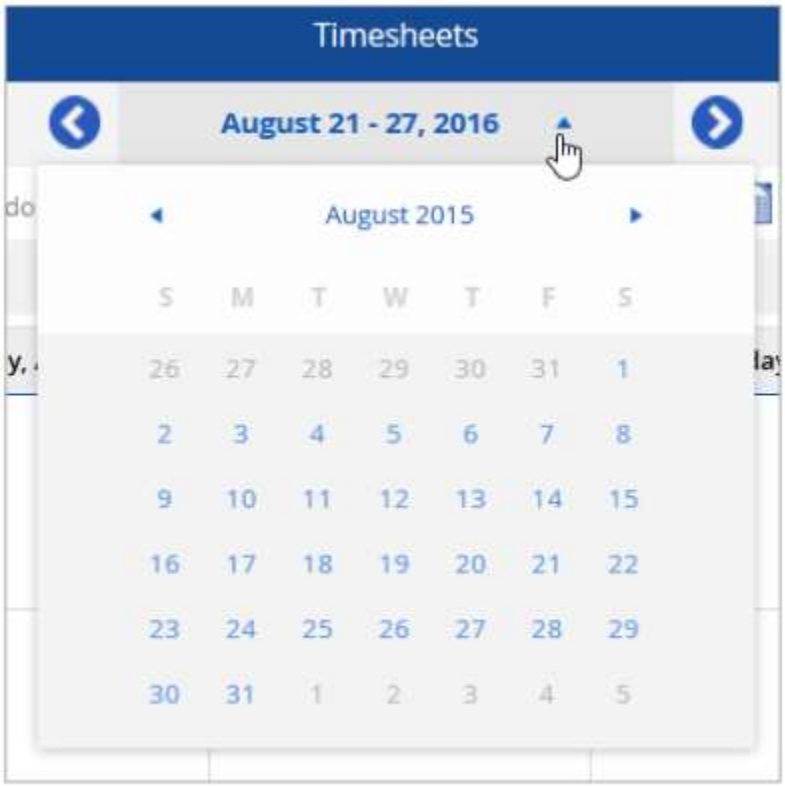
4. Use the + and - icons to expand and collapse the locations as necessary.
5. Select a location and then click **OK**. The location name is displayed in the **Organization** field.
6. Click **Load**. The application loads the timesheets for the selected location.

Load Timesheets by Calendar Week

You can load the timesheet for a specific week using the drop-down calendar.

To load the timesheet for a specific week, complete the following steps:

1. Navigate to **Timesheets**.
2. Click the date at the top of the timesheet:
3. 

4. The drop-down calendar opens:
5. 

6. Click on a date in the calendar to select a date. The application loads the timesheets for the corresponding week.

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Note: You can also click the left and right arrows beside the date to navigate to the next week, or the previous week, as needed.

Timesheet Icons

The following icons appear in the Timesheets feature:

Shift Status Icons

Icon	Purpose
	Indicates worked shifts that were scheduled.
	Indicates worked shifts that were not scheduled.
	Indicates scheduled shifts that the employee did not work.
	Indicates scheduled shifts that the employee did not work but have a pay adjustment recorded against them. For example, if an employee was absent for a shift, but you or the employee created a vacation entry.
	Indicates that one or more activities are scheduled on this day. This application may also display custom activity icons for certain activities.

Shift Detail Icons

Icon	Purpose
	Indicates the shift start time.
	Indicates the shift end time.
	Indicates that the shift has unsaved changes.
	Indicates that the shift includes a meal.
	Indicates that the shift includes a break.
	Indicates that meals or breaks were automatically inserted into this shift.
	Indicates an employee comment on the shift.
	Indicates a manager comment on the shift.
	Indicates that both an employee and a manager have commented on the shift.
	Indicates that the employee authorized the shift.
	Indicates that the manager authorized the shift.
	Indicates that both an employee and manager have authorized the shift.
	Indicates that the shift occurs at the employee's secondary location.
	Indicates that there is a serious problem with the shift.
	Indicates that a warning message exists for a problem with the shift.
	Indicates that an informational message exists for the shift.
	Indicates that the data displayed in the timesheet does not represent the most recent changes. Recalculation
	Displayed next to the employee's name, this icon indicates that pay has already been transmitted, and that any edits to the employee's timesheet data will create retro adjustments.

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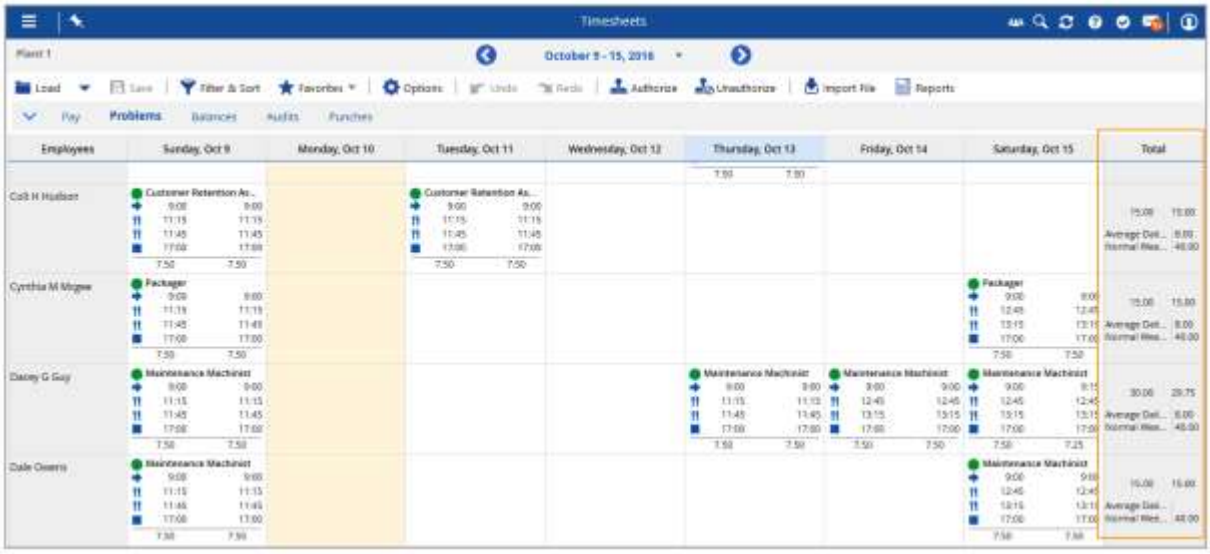
Add/Edit Shift Dialog Box Icons

Icon	Purpose
	Indicates the location associated with the shift.
	Indicates the job associated with the shift.
	Indicates the pay code associated with the shift.
	Indicates the project associated with the shift.
	Indicates the start and end time for meals associated with the shift.
	Indicates the start and end time for breaks associated with the shift.

Review Timesheet Totals

In **Timesheets**, you can review your employees' weekly totals at-a-glance in the **Total** column. In this example, Dacey G Guy has worked varying amounts throughout the week. In the **Total** column, the following information is displayed:



By default, the application displays the weekly hours scheduled and the weekly hours worked. In this example, the weekly hours scheduled are 30.00 and the weekly hours worked are 29.75.

Modify View Options

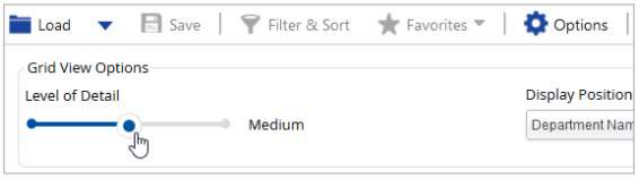
You can adjust how information is loaded and displayed by clicking **Options** in the **Timesheets** tool-strip, and then adjusting the settings in the **Options** panel.

Grid View Options

The Grid View Options section of the Options panel contains the following settings:

Level of Detail

Click and drag the slider left or right to move between a low level of detail, a medium level of detail, and a high level of detail:



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Display Position As

Select one of the following options, depending on how you want to display employee positions in the schedule:

- **Department Name Job Name**: Select this option and the application displays both the department name and the job name on the timesheets.
- **Job Name**: Select this option and the application displays only the job name on the timesheets.

General Options

The **General Options** section of the **Options** panel contains the following settings:

Autoload on Start

Select this checkbox and the application automatically loads the timesheet when you open **Timesheets**, without waiting for you to select a week and click **Load**.

Show Problem Pane After Timesheets Are Loaded

Select this checkbox and the application loads the Problems panel automatically when you open **Timesheets**.

View Totals In Hours:Minutes

Select this checkbox and total hours are displayed in the hours:minutes format on the timesheets.

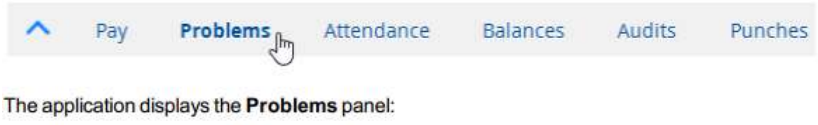
Review Problems and Exceptions

In **Timesheets**, Dayforce alerts you to any problems and exceptions with your employees' time and attendance records by flagging the appropriate cell with the error, warning, or message icons.

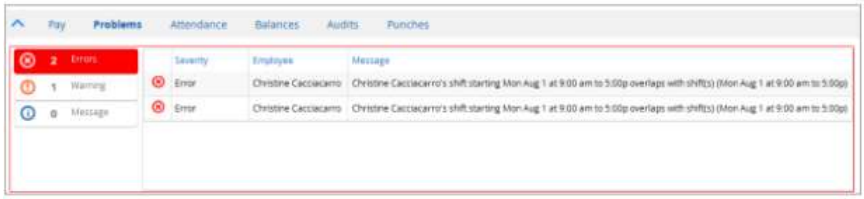
You can view any errors, warnings, or messages that exist on the timesheet in the **Problems** panel.

Note: An icon is also displayed on the affected shift in the timesheet to indicate where the problem occurred.

To view problems in **Timesheets**, click the **Problems** tab:



The application displays the **Problems** panel:



Click one of the three tabs on the panel to view the errors, warnings, and messages, as needed. You can view one type of problem at a time or all at the same time, depending on your needs.

Problems

Problems occur when an employee's time and attendance records for a day are incomplete or conflicted. They represent situations where the application cannot pay the employee correctly based on the time and attendance.

If, for example, an employee punches in for work but forgets to punch out, the application flags the problem on the timesheet:

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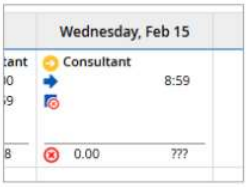
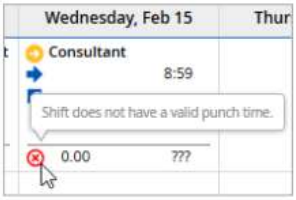


Problems like this represent gaps in an employee's time and attendance records. For example, without punching out the application cannot calculate how long the employee worked, which means that the employee cannot be accurately paid for that day.

To see what specific problem a shift has, hover your cursor over the problem icon ( ):



The application displays a short description of the problem.

Although any problems that exist must be fixed, you can still save a timesheet with some problems, depending on what they are. If any of the following problems exist on the timesheet, the application will not let you save it without correcting them first:

- **Meals or Breaks Outside of the Shift**: If the employee recorded a meal or break outside of the shift they worked, you cannot save the timesheet without fixing the problem. For example, a problem occurs when an employee recorded taking a meal at 4:00 PM, but only worked from 9:00 AM to 3:00 PM.
- **Activities Outside of the Shift**: If the employee recorded working an activity outside of the shift they worked, you cannot save the timesheet without fixing the problem.
- **Overlapping Worked Shifts**: If an employee's time and attendance records have overlapping meals or breaks, you cannot save the timesheet without fixing the problem.

You can fix problems on the timesheet by editing the employee's time and attendance records, deleting overlapping shifts, correcting meal or activity times, or entering times for the missing punches. For more information, see **Edit Shifts**.

Exceptions

Exceptions occur when an employee's worked shift does not match their scheduled shift. An employee punching in late or punching out early are common examples of exceptions that the application flags on the timesheet:

Exceptions represent information that can be useful for you to know. For example, you'd want to see that the same employee was late for all their shifts one week. They are for your informational purposes only. Since employees can still be paid accurately off their time and attendance records, even if they have exceptions, you do not have to correct them.

To see what the exception is on any shift, hover your cursor over the warning icon ( ):

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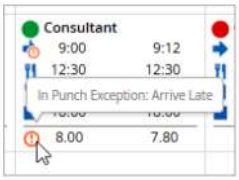
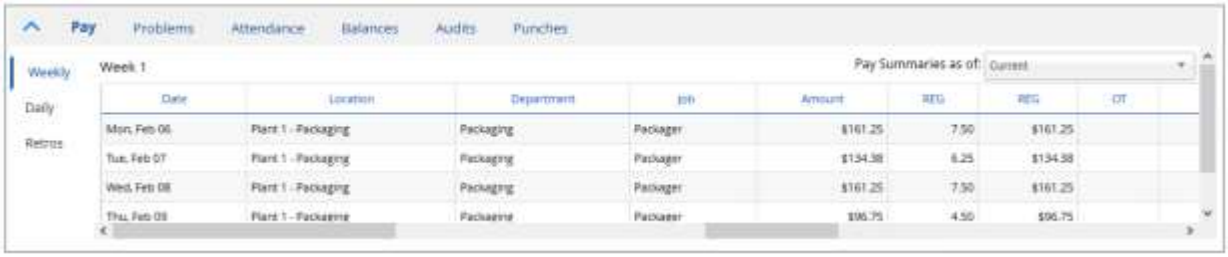


The application displays a short description of why there's an exception on the shift.

Pay Summaries

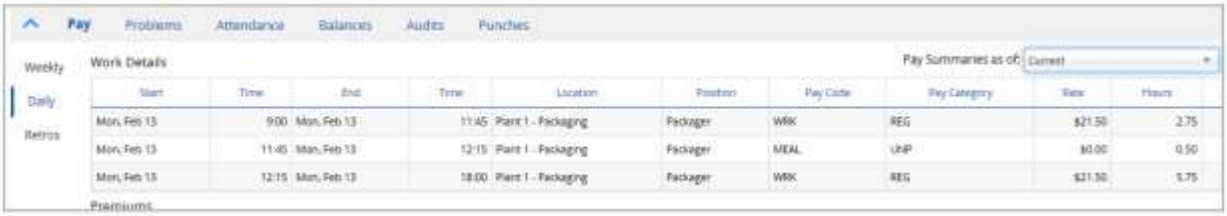
In **Timesheets**, you can look up and review your employees' pay summaries for each week. The pay summary has three views: a weekly summary, a daily summary, and a retroactive summary.

The weekly pay summary details the number of hours the employee worked each day, how that time is categorized according to pay (e.g., regular time, overtime, or double-time), and how much the employee was paid.



In this example, the employee has worked varying amounts throughout the week, but did not earn any overtime or premiums, so all of the time is classified in the **REG** column, representing regular pay.

The daily pay summary tracks the pay details of each employee's worked shifts during each day, such as pay rate, hours worked, and amount paid.



In this example, the employee has worked a typical day with a 30 minute, unpaid meal break from 11:45 AM to 12:15 PM. Each row represents a specific pay detail, which is a segment of time in the employee's day.

View Pay Summaries

You can view the pay details for each employee in the **Pay** panel.

To view the pay details for an employee, complete the following steps:

1. Navigate to **Timesheets**.
2. Load the timesheet for the relevant week. For more information, see Load **Timesheets**.
3. Select the employee's name, and then click the **Pay** tab:

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The application displays the **Pay** panel:

4. Select one of the three tabs on the panel to view the employee's pay details. Each tab provides the following information:
    a. **Weekly**: Provides details such as date, location, or department, along with a total that includes all days for the selected week.
    b. **Daily**: Provides details about the pay for the selected day.
    c. **Retros**: Provides information about changes made to the time and attendance records after the pay period was transmitted to payroll.

View Retroactive Pay Summaries

You can view the pay summary for retroactive adjustments in the Pay panel by clicking the Retros tab.

For more information about viewing retroactive adjustments, see **Retroactive Adjustments**.

Review Attendance Records

You can view employee attendance incidents in the **Attendance** panel.

To view an employee's attendance record in the **Timesheets** feature, select the employee, and then click the **Attendance** tab:

The application displays the **Attendance** panel:

Click the **Weekly** tab to view attendance incidents for the entire week, or the **Daily** tab to view incidents on the selected day, as needed.

Review Balances

You can view the balances accrued by employees, such as vacation days or sick time, on the timesheet's **Balances** panel.

To view an employee's balance details in **Timesheets**, select the employee, and then click the **Balances** tab:

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The application displays the **Balances** panel:

Click one of the three tabs to view details about the employee's entitlement balances. Each tab provides the following information:

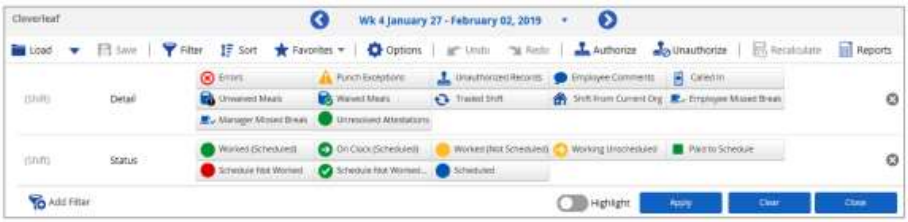
- Summary: Provides details for Accrued, Approved, Pending, Remaining, and Exceeded hours.
- Daily: Provides transaction details for the selected day.
- Expiring Transactions: Provides details about transactions that are expiring. For example, if you are eligible to take a day off within 30 days of working on a holiday, the Expiring Transactions tab shows this entitlement until it expires.

Filter Timesheets

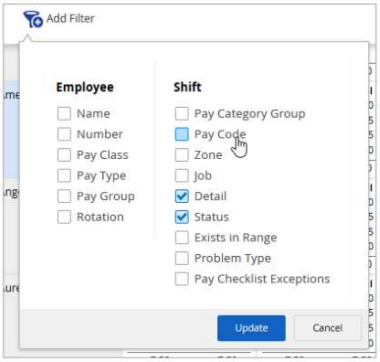
You can filter your location's timesheets so that only the shifts that meet certain criteria are displayed.

To filter the timesheet, complete the following steps:

1. In **Timesheets**, click the Filter button. The application opens the following panel:



2. Click **Add Filter** and select the filters that you want to use:



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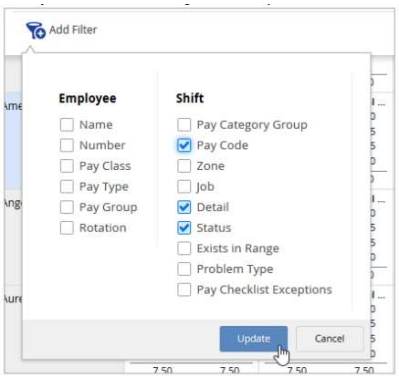
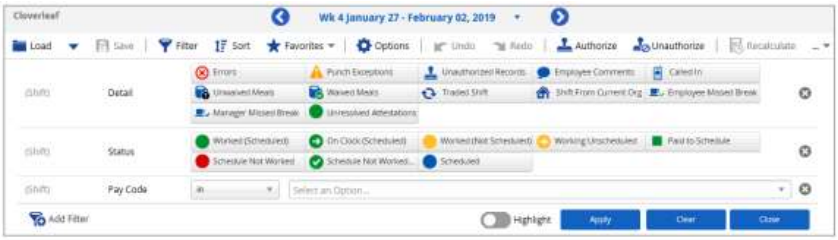
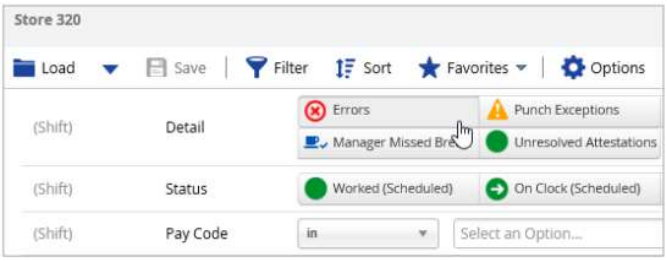
3. When you have finished selecting filters, click **Update**:



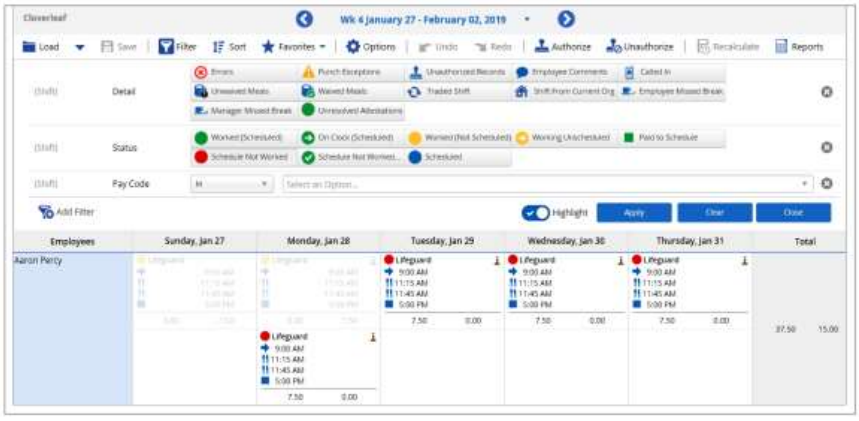
The panel displays the filters that you selected:



4. Enter the values that you want to filter based on. For example, if you select the Details category, and then click Errors and Punch Exceptions, the application only displays timesheets that contain an error or punch exception:



5. (Optional) Click the **Highlight** switch to enable highlighting on the timesheet. This switch grays out shifts and employees that do not meet the filter criteria, so you can more easily identify those that do.
   In the following screenshot, **Schedule Not Worked** is selected in the **Status** filter, so when the **Highlight** switch is enabled, shifts with any status other than **Schedule Not Worked** are grayed out:

6. 

7. When you are finished selecting your filter options, click Apply or press the Enter key to close the panel and filter the timesheets. The Filter button changes color to indicate that a filter is applied:

Save Timesheet Filters and Lists as Favorites

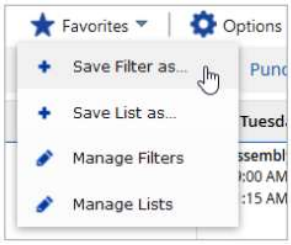
After filtering a timesheet, you can save the filter options as a "favorite" so that you can re-apply it to the timesheet whenever you need to. You can also save the filter as a "list" to be re-applied as necessary. The users added to a list are persisted. Unlike a "favorite", where the filter is evaluated each time it is applied, lists are static.

For example, if you create a list based on a filter that includes all of the users assigned the "Manager" job, the list will not automatically update to include users that are assigned the "Manager" job at a later date.

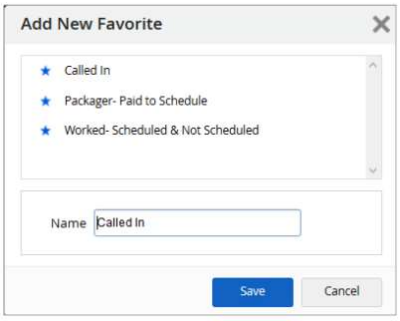
Note: When you save a favorite, the selected sorting options are also saved.

To save a filter as a favorite:

1. In **Timesheets**, click **Favorites**. The application displays a drop-down list:



2. Select **Save Filter as** to open the **Add New Favorite** dialog box:



3. Enter a name for the filter in the **Name** field.

Note: If there is an existing favorite with the same name, the application displays a dialog box asking you to confirm that you want to overwrite the existing file.

4. Click **Save** to save the favorite and close the dialog box.

After you save a filter as a favorite, it is displayed in the **Favorites** drop-down list:

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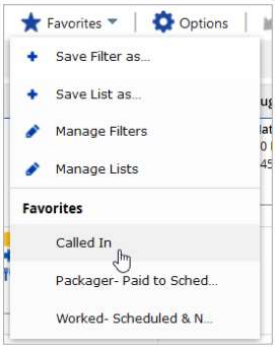
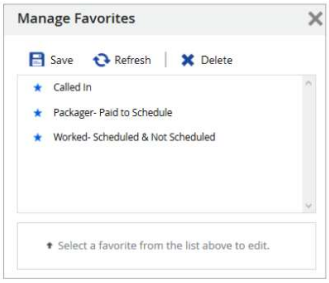


You can apply the filter to timesheets by selecting it in the list. The Favorites button changes color and displays the name of the applied filter:

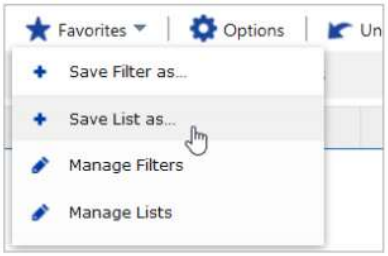
If you want to rename or delete a favorite filter, select **Manage Filters** in the **Favorites** drop-down list. The **Manage Favorites** dialog box opens:



Select the filter that you want to rename, and then enter a new name in the **Name** field to rename if, or click **Delete** to remove it from the group of favorites.

To save a favorite list:

1. In **Timesheets**, click **Favorites**. The application displays a drop-down list:



2. Select **Save List** as to open the **Add New List** dialog box:

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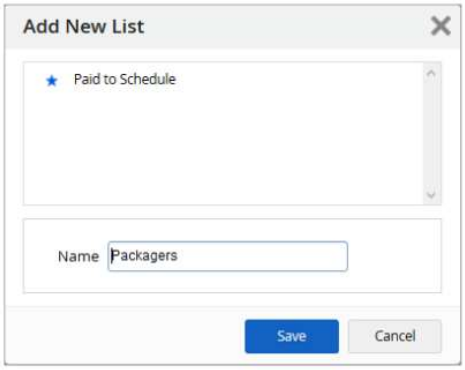
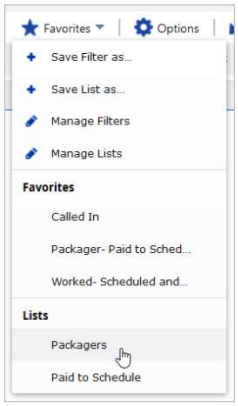


3. Enter a name for the list in the **Name** field.

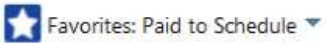
   Note: If there is an existing list with the same name, the application displays a dialog box asking you to confirm that you want to overwrite the existing file.

4. Click **Save** to save the favorite list and close the dialog box.

After you save a list as a favorite, it is displayed in the **Favorites** drop-down list:



You can apply the list to timesheets by selecting it in the drop-down list. The Favorites button changes color, and displays the name of the applied list:



If you want to edit or delete a favorite list, select Manage Lists in the Favorites drop-down. The Manage Lists dialog box opens:

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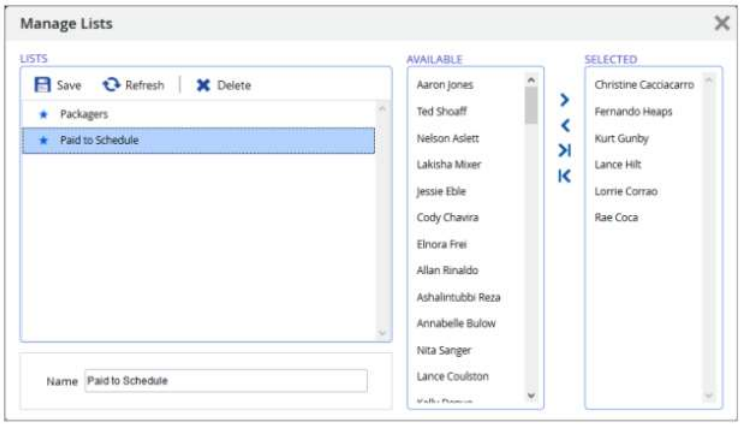


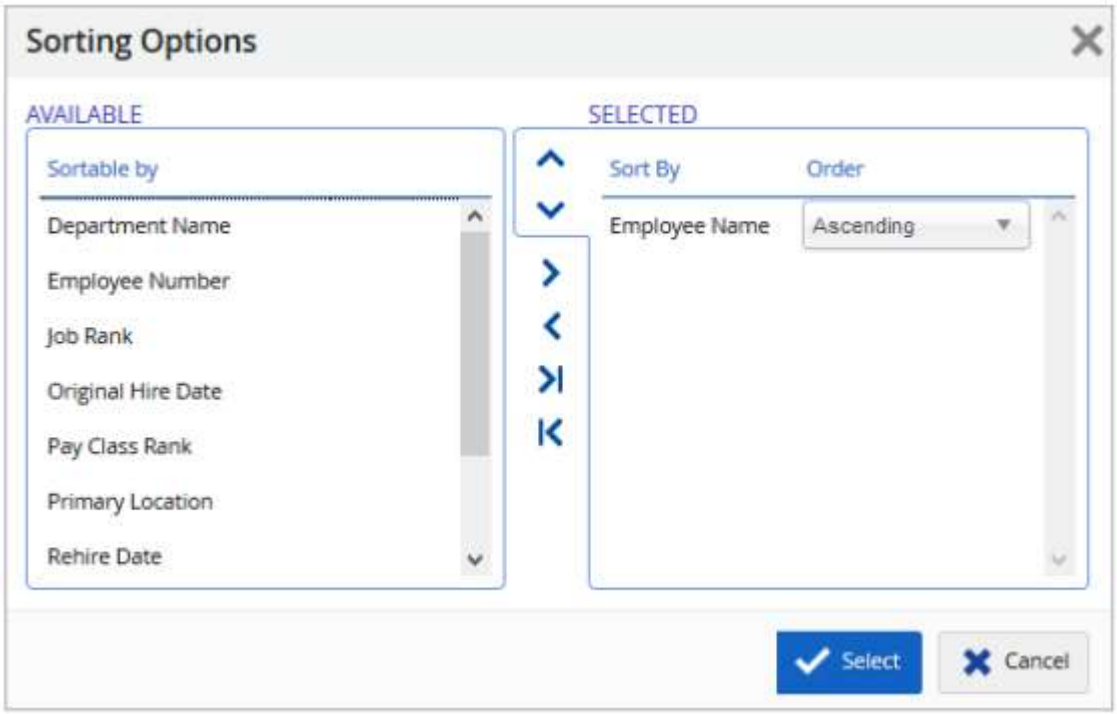
Select the list that you want to edit, and then enter a new name in the **Name** field, or click **Delete** to remove the filter from the group of favorites. If you want to add or remove employees from the list, click the left and right arrows to move the employees between the **Available** and **Selected** columns, as needed.

Sort Timesheets

You can sort your location's timesheets depending on how you prefer to view the timesheet's data.

To sort the timesheet, complete the following steps:

1. Navigate to **Timesheets**.
2. Click the **Sort** button. The application opens the **Sorting Options** dialog box:



3. Select the parameters that you want to sort by in the **Available** column, and then double-click each one, or click the right arrow (›) to move the parameters into the Selected column.
4. Click the up and down arrows to order the parameters the way you want the timesheets sorted. The application will sort the timesheets by the first parameter in the list, then by the second, and finally by the third.

Note: You can add a maximum of three sort options. The application uses the additional sort criteria for shifts that are tied in the first sort order.

5. In the **Order** drop-down list, select whether you want the criteria sorted in ascending or descending order.
6. When you have finished selecting your sort options, click **Select**. The application sorts the shifts on your location's timesheets in the selected order.

Correct Time, Attendance, and Pay

With Dayforce's Timesheets feature, you can correct the time and attendance records of your employees, one week at a time. Having correct time and attendance records helps to ensure that your employees are paid accurately.

As you are reviewing the timesheet, you need to correct any highlighted problems. You can adjust any exceptions or other time, attendance, or pay inaccuracies by recording new worked shifts, editing recorded shifts or break times, removing worked shifts, and entering pay adjustments.

Part of correcting employees' pay records can include altering the pay details on the timesheet. The application can track labor metrics – such as what position an employee worked during their shift, or on what project – for reporting purposes.

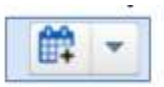
Record Worked Shifts

In the timesheet, the application displays two types of shifts: scheduled and worked. Worked shifts represent the time employees actually spent working. Since they are paid based off their worked shifts, it is important these shifts accurately reflect when the employee worked.

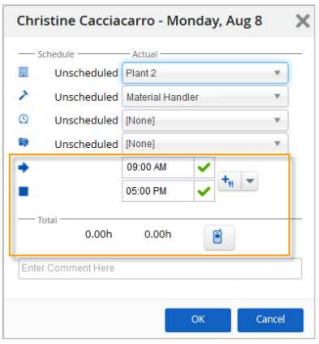
Worked shifts are recorded by the employee throughout the week, typically by using a punch clock. However, if an employee was unable or forgot to record a worked shift, you can record the shift using Timesheets.

Depending on which shift you select, the application may display the add shift icon ( ).

If you select a shift for which the employee was not scheduled or has already recorded a worked shift on that day, the application displays the add shift icon and add drop-down list:



Clicking this icon also opens a dialog box in which you can add the shift details. However, this dialog box is slightly different from the dialog box used to link shifts because it provides green checkmarks beside the default start and end times:



In this case, you can click the checkmarks to confirm the default start and end times (or modify the times, as needed).

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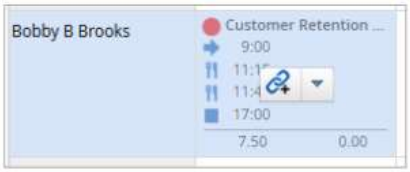
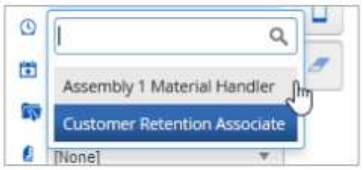
Before you record the shifts your employees worked, you need to load the relevant week. For more information, see **Load Timesheets**.

To record worked shift:

1. Navigate to **Timesheets**.
2. Select when and for whom you want to record a worked shift.
   The timesheet assigns a row to each of your employees; select the appropriate employee's row, in the column for the date the shift was worked.

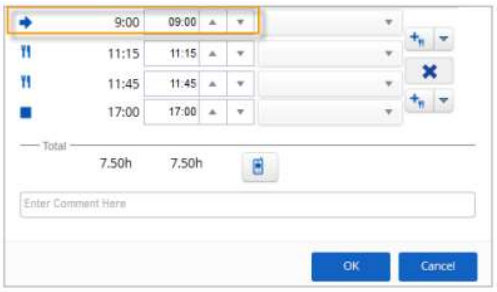


   In this example, you've selected the cell for Bobby B Brooks on Sunday, who forgot to punch in and record when he worked.
   The timesheet marks that Bobby was scheduled but did not work on Sunday by labeling the cell with a red circle icon (●), one of the icons it uses to label the different situations that can occur. For more information, see **Timesheet Icons**.
3. Depending on how your application is configured, you may see the employee's primary job, the default meals or breaks, and the shift's default start and end time and default meal/break times.
4. If needed, adjust the shift details using the associated drop-down lists in the dialog box. For example, you can change the shift's location in the drop-down list next to the locations icon ( ).
5. (Optional) Select the position the employee worked during the shift from the drop-down list:



Note: By default, the application uses the employee's primary job. Employees with only one qualified job cannot be assigned a different position.

6. Enter the worked shift's start time in the first field, next to the shift start icon or use the right and left arrows to adjust the time:



7. Enter the worked shift's end time in the last field, next to the shift end icon or use the right or left arrows to adjust the time:

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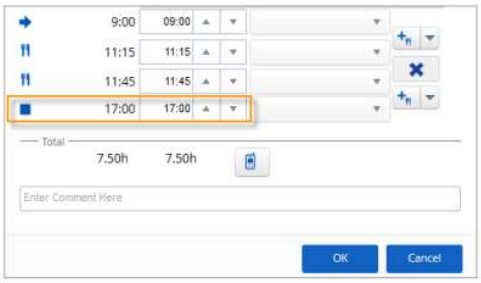
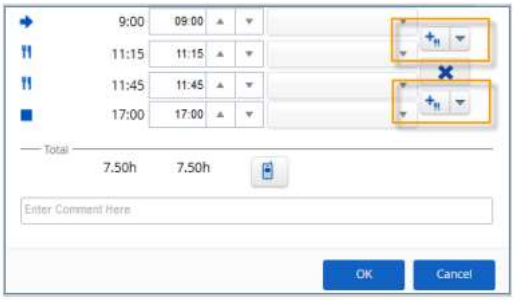
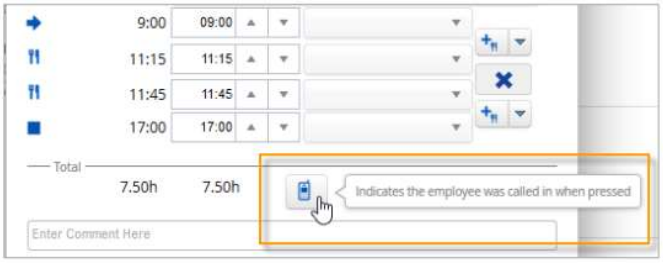


8. If the shift does not have any meals or breaks, or you want to record another, click the add meal icon. If you want to add a break, click the arrow next to the add meal icon, and then select **Add Break** in the drop-down list. Once added, you can modify the start and end time for the meal or break:



9. (Optional) Click on the call icon to indicate the employee was called in to work the shift.



10. (Optional) Enter any comments in the text field at the bottom of the dialog box.
11. When you're finished creating the new shift, click **OK**. The application closes the dialog box and adds the shift to the timesheet.
12. Click **Save**.

Edit Shifts

You can edit worked shifts in Timesheets if they do not match an employee's actual time and attendance.

Before you edit shifts, you need to first load the relevant week. For more information, see Load Timesheets.

To edit shift details, complete the following steps:

1. In Timesheets, left-click the shift you want to edit and then click the edit icon:

   The application displays a dialog box where you can edit the shift details:

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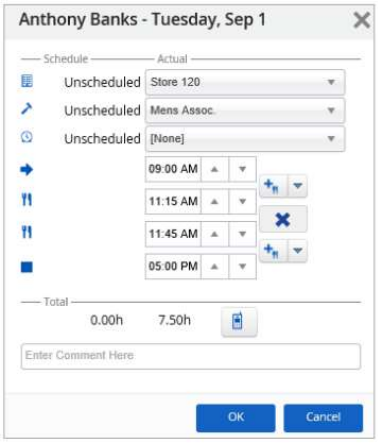
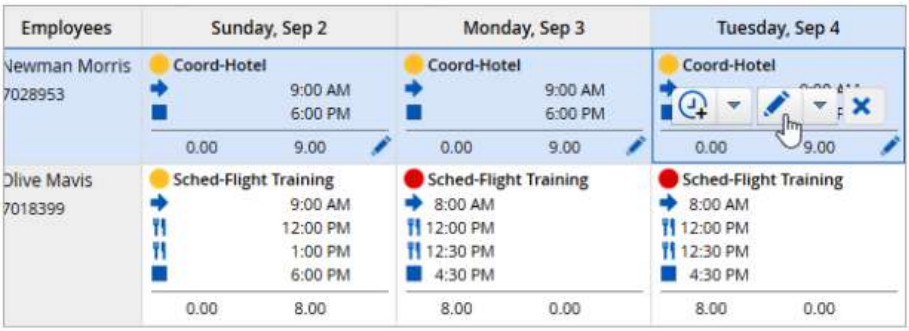


2. Modify the shift details as needed and click **OK**. The dialog box closes and the edit icon is displayed on the shift to indicate on the shift to indicate that it was modified.
3. Click **Save**. The application records the changes to the worked shift.

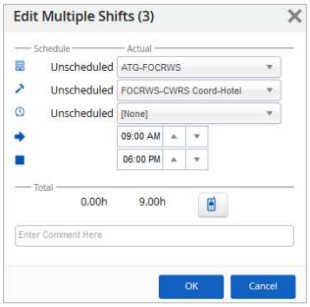
Edit Multiple Shifts

If necessary, you can edit multiple shifts at the same time for an employee in **Timesheets**.

To edit multiple shifts at once, hold down the Ctrl key and left-click the shifts you want to edit. Selected shifts are highlighted in blue. Next, click the edit icon:



The **Edit Multiple Shifts** dialog box opens:



Note: The number in the Edit Multiple Shifts heading represents the number of shifts being edited. In the screenshot above, three shifts are being edited at once.

Modify the shift details as needed and click **OK**.

Remove Shifts

To remove a shift in **Timesheets**, left-click the shift you want to delete, then click the delete icon (✖):

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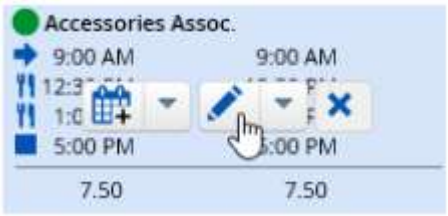
The application deletes the shift. When you're done making changes to the timesheet, click **Save**.

Note: You can undo this action before you save. For more information, see **Undo and Redo Timesheet Changes**.

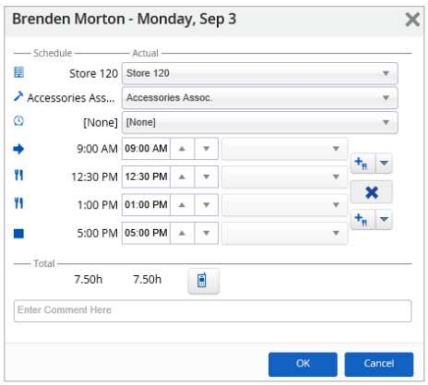
Remove Meals and Breaks

If necessary, you can delete meals and breaks in **Timesheets**. To remove a meal or break, complete the following steps:

1. Click the shift containing the meal or break you want to remove.
2. Click the edit icon:



The application opens a dialog box containing the shift's details:



3. Click the delete icon next to the meal or break you want to remove:

4. Click **OK**. The application closes the dialog box and removes the meal or break from the shift.
5. Click **Save**.

Undo and Redo Timesheet Changes

You can undo a change you've made to the timesheet, including recording worked shifts, removing shifts, adding pay adjustments, or any of the other time and attendance actions you perform, as long as you have not saved the timesheet yet.

To undo a change, click the **Undo** button:

The application reverts the timesheet to what it was before your last change.

To redo a change (i.e., cancel your most recent undo action), click the Redo button:

The application reapplies whatever change to the timesheet you undid last.

Approve Timesheets

After you've reviewed your timesheets for the week and made any corrections, you are ready for the last steps, which involve approving the timesheet. This section describes these final tasks, which include how to:

- View Audit Information
- Comment on Timesheets
- Authorize Timesheets

View Audit Information

Dayforce tracks changes made to the time and attendance records on the timesheet, such as changing worked shift start and end times. It stores these changes in the audit log, which you can view from the **Timesheets** feature.

Any shifts that have been changes since the last time you saved the timesheet are marked with the pencil icon:

These are your current edits; they can still be reversed with the **Undo** button. When you save the timesheet, any changes are applied and cannot be reversed by the **Undo** button.

You can view a record of all changes made to the timesheet on the **Audits** panel.

To view your timesheet change record in the **Timesheets** feature, select a shift, and then click the **Audits** tab:

The application displays the Audits panel:

This panel includes a detailed record of changes made to the selected shift. Some of the columns use icons to represent shift details, and if the heading applies to the shift, the application displays a checkmark. The following is a description of each of these columns:

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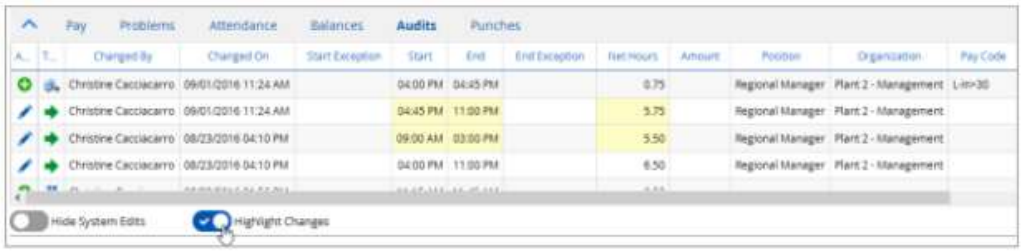
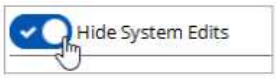
Icon	Purpose
	Call In: Displays a checkmark if the user was called in for the shift.
	Employee Authorized: Displays a checkmark when the user has authorized the shift or pay adjustment.
	Manager Authorized: Displays a checkmark when a manager has authorized the shift or pay adjustment.
	Auto Injected: Displays a checkmark when a user's meals or breaks were automatically inserted into their shift to comply with their punch policy.
	Employee Comment: Displays any comments that the employee added.
	Manager Comment: Displays any comments that the manager added.

If you want to highlight the specific work details that were changed, toggle the **Highlight Changes** switch:



If you want to view only changes made by users, and not those made automatically by the application, toggle the **Hide System Edits** switch:



Commenting on Timesheets

As you are reviewing or changing records on the timesheet, you can comment directly on any shift. Your employees will see your comments when the log in to Dayforce and approve their time and attendance records.

To add a comment, complete the following steps:

- Nevigate to **Timesheets**.
- Left-click the appropriate shift and then click the edit icon. The application displays the edit dialog box for the selected shift:

- Enter your comment in the comment field at the bottom of the dialog box:

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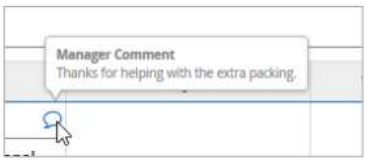
You can edit or delete your comments using this field, if needed.

- Click **OK**.

Comments are visible to employees once you save the timesheet. A comment icon appears in their shift and they can hover over it to read the comment.



Authorize Timesheets

Once the worked shifts on the timesheet accurately represent when your employees worked, and the pay details are correct, you can authorize the shifts to record that you have reviewed the records and that they are accurate. If necessary, you can also unauthorized shifts.

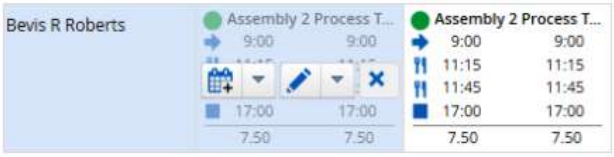
To authorize timesheets in the Timesheets feature, select the shift or shifts that you want to authorize, and then click **Authorize**.

If you want to unauthorize a shift, click Unauthorize.

Once you authorize shifts and click Save, Dayforce marks the selected records as authorized, which means that the worked time has been approved. It is not the same as approving pay for the employees, which is part of the payroll process in the application.

You can select which shifts to authorize as follows, depending on your needs:

- Select an individual cell to authorize only that shift:



- Click an employee's name to authorize all their records for the week:

- Click a date to authorize all of the records on that day:

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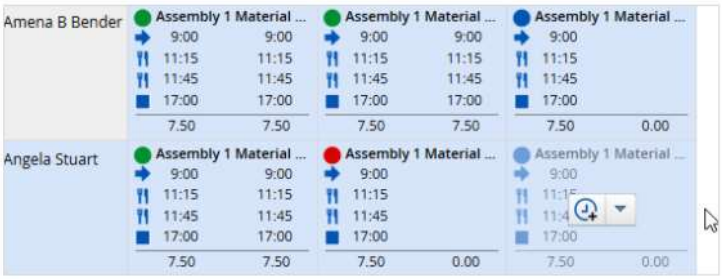
- Select a block of shifts to authorize by clicking and dragging your mouse over the desired shifts:



- Press and hold the Ctrl key down and select several shifts:

Using Time Review

Time Review provides an HTML-based interface for managers to review, edit and approve their employees' worked time. You can specify which records to load and how you want time to be displayed. For example, you could configure multiple views so that you can view hourly employees' timesheets separately form salaried employees' timesheets.

These tasks are described in more detail in the subsequent sections of this guide.

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Load Data in Time Review

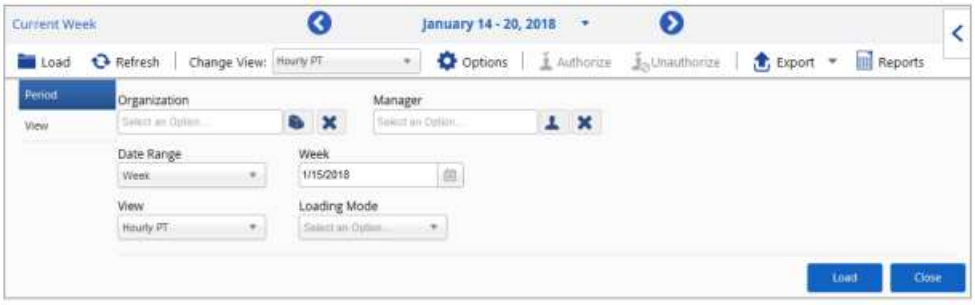
When you navigate to **Time Review**, the application does one of two things:

- If the application is configured to load data automatically, it pre-loads the first view in the Change View drop-down list:

- If the application is not configured to load data automatically, it does not load any data until you specify which data to load.

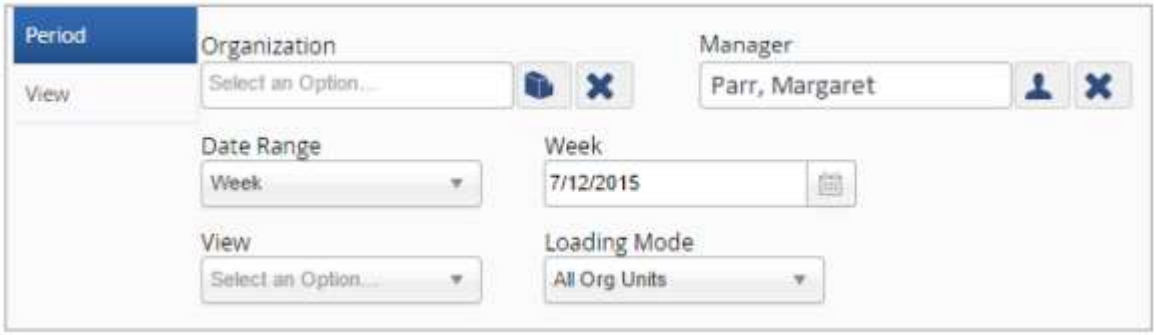
Note: You can override the configuration of the **Auto Load** checkbox in the **Options** panel. To do so, click **Options** to open the **Options** panel. Then, select the **Autoload on Start** checkbox to load timesheets automatically in **Time Review**, or clear the checkbox to prevent timesheets from loading automatically. Click **OK**.

To load timesheet data, click **Load**. The application displays the **Load** panel, where you can select what data to load.



The load panel provides the following options:

- **Org**: Allows users to specify which location they want to review time for.
- **Manager**: Allows users to specify which manager's employees they want to review time for. When a manager has direct employee to manager security configured (i.e., rather than just derived by org security) this parameter defaults to that manager, and that manager's name appears in the Manager picker, as shown in the following examples:



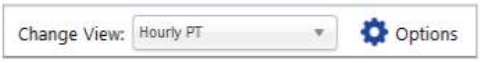
  As well, only the manager's direct reports are loaded.
- **Date Range**: Allows users to specify whether they want to load a week, month or pay period. Whichever option they choose, the application displays the appropriate date selector. For example, with Week selected, the application displays the Week drop-down list so that users can select which week they want to load.
- **View**: Displays any views that the user has configured. For example, users can save a view with only their part time, hourly employees displayed, so that they don't have to manually apply these same filters multiple times.
- **Loading Mode**: Specifies what data to load:
    - **All Org Units**: The application loads employees form all organizational units.

- **Default Org Unit**: The application loads employees who belong to the default org only and report to the loaded manager.
- **Direct Reports Only**: The application loads only the direct reports of the loaded manager.

When you have specified the necessary data, click Load. The application loads the data you've specified and closes the Load panel. To open it again, click Load in the tool strip.

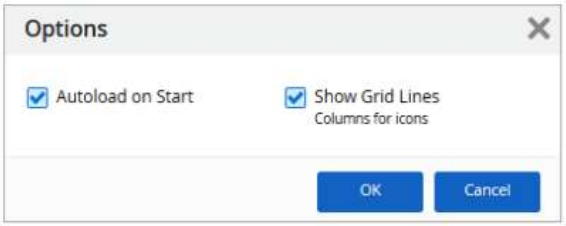
View Options in Time Review

Once you've navigated to **Time Review**, you can edit the view options to further customize the feature. Click the **Change View** drop-down list and **Options** button to further customize your view:



In the C**hange View** drop-down list, you can load views already configured in the application. For example, you can configure views where only specific columns appear, and you can specify how records are grouped together in the views.

When you click **Options** in the tool strip, the **Options** dialog box opens:



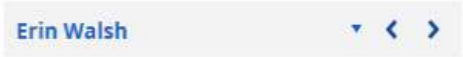
- **Autoload on Start**: Select this checkbox so the application loads timesheets automatically when you navigate to Time Review.
- **Show Grid Lines** (Columns for Icons): Select this checkbox to divide the **Problems**, **Authorized**, and **Edit** columns with grid lines when using the **Grid View**.

Note: The **Problems**, **Authorized**, and **Edit** columns aren't labeled in the application.

Navigate Employees in Time Review

You can load an employee by doing any of the following:

- Select the employee's name in the drop-down list at the top left of the slide-out panel:



- Navigate to the next or previous employee click the arrows.
- Display all of the employees to which you have access by clicking the Show All Employees button in the employee drop-down list:

- This clears the previously loaded filter and displays a list of all of the employees you have access to:

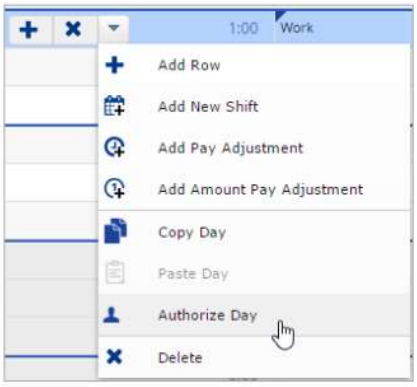
- Then, you can select an employee form the list top open their timesheet in the employee timesheet slide-out panel.

Note: When you navigate to weeks that are outside of your management effective date, application displays a message to let you know that you do not have access to the selected time period for the employee, and the timesheet grid and balances panel are hidden.

Approve Timesheets in Time Review

The application provides multiple options for approving time in Time Review:

- In the main grid, select a segment, day, or employee and click Authorize. The application approves the selected item and all of the items beneath it. For example, with an employee selected, the application approves all of the time that employee has recorded in that period.
- In the slide-out panel, click **Authorize All** and the application authorizes the employee's time and attendance records for the entire week.
- In the slide-out panel, to authorize a single day, click the drop-down list for the day, and select **Authorize Day**:



You can also unauthorized a single authorized day using the drop-down list:

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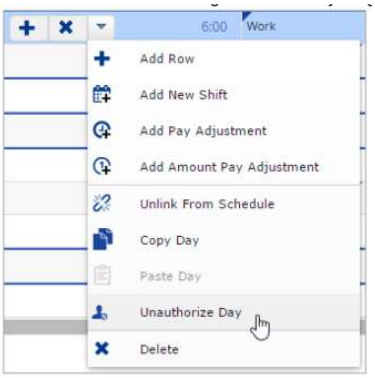


The application displays the manager approved icon next to approved records:

On days where both the manager and employee have approved a record, the application displays two icons:

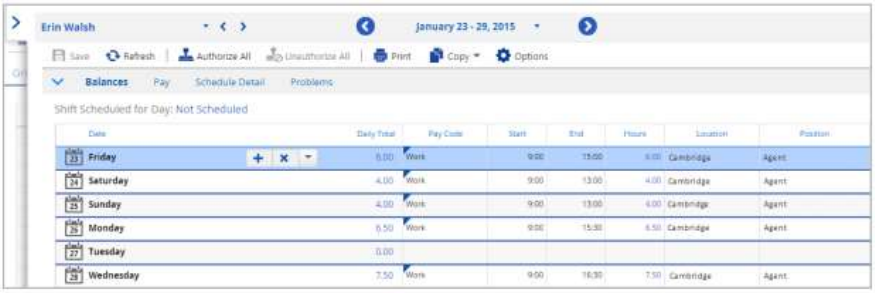
Note: Depending on the view settings you select, the application might disable the Authorize and Unauthorize buttons. For example, the application disables these buttons when the time is grouped by day.

Edit Timesheets in Time Review

If necessary, you can edit your employees' time and attendance records in one of two ways:

- By clicking the edit icon in the appropriate row, or
- By selecting the appropriate row and opening the slide-out panel:

Regardless of which method you select, the application displays the employee's timesheet in the slide-out panel:



Here the application provides similar controls to the ones available in **Work > Timesheet**. For more information, refer to the Timesheet section.

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IMPORTANT: When you have finished editing timesheets, you must click **Save** before closing the slide-out panel. The application does not automatically refresh the grid in **Time Review** when you close the slide-out panel. Instead, it displays a pencil icon next to any edited rows until you click **Refresh**.

People

The **People** feature provides a centralized access point for data about your employees, such as their status, contact information, and benefits elections.

View or Hide Columns

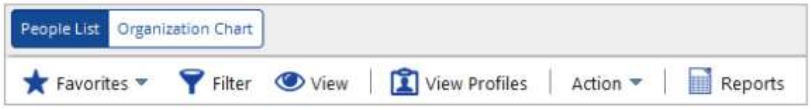
Changing the columns that are displayed allows you to configure what information is available immediately when you open **People**. For example, if you often need to know employee hire dates, you can configure the application so that this column is always displayed.

To change which columns are displayed, complete the following steps:

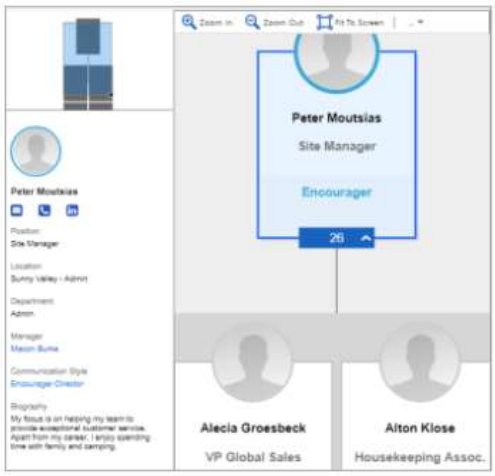
1. Click the **View** button.
2. Click the **Choose Columns** button.
3. Do any of the following actions:
    a. To remove a column, move it form the **Selected** to **Available** list using the arrows.
    b. To add a column, move it from the **Available** to **Selected** list using the arrows.
    c. Click the **Select** button.

View the Org Chart

For your convenience, you can view the org chart from directly within People (Whereas previously it was only available on employee cards). Use the Organization Chart and People List buttons to toggle between the two views:



With the org chart open, you can navigate the hierarchy by scrolling, zooming, and hiding or showing parent and child levels:



When you select an employee, the left sidebar displays the following additional information:

- Icons that you can click to display the employee's business email, business phone number, and LinkedIn profile, if available. Other types of online profiles such as Facebook are not displayed.
- Name of the employee's primary position and location, or "Virtual" if the work assignment is set as virtual.
- Name of the employee's department in the above location.
- Employee's manager.
- Employee's biography, if available.

When you're finished viewing the org chart, click People List to return to the list, where you can view more information and interact with the profiles.

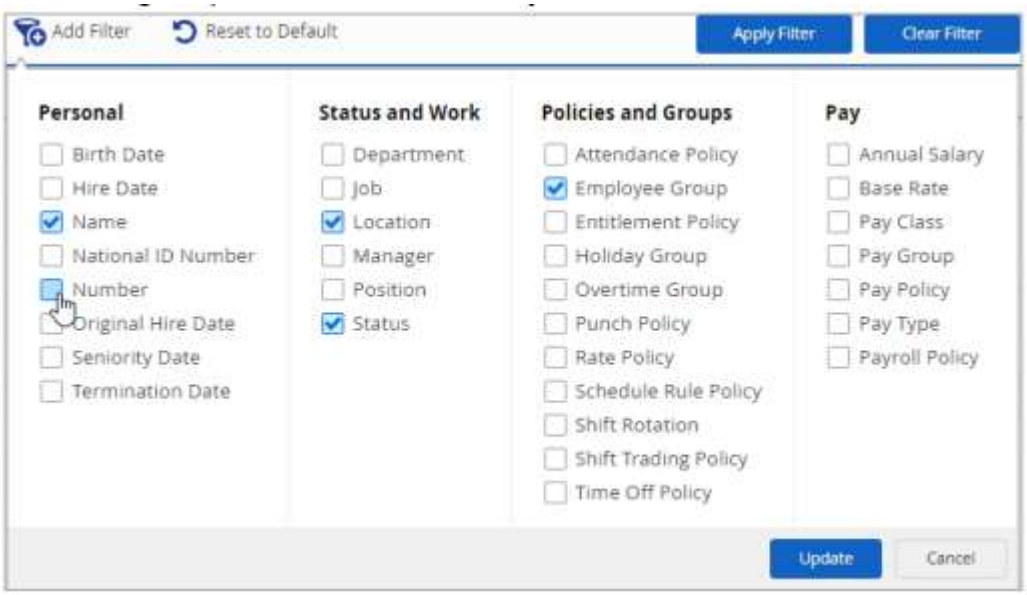
Filter Employee Records

Before You Begin: The filters you have access to depend on the access authorizations assigned to your role. For example, if you do not have permissions to view employee pay information, the application does not display affected pay filters.

Filtering employee records allows you to narrow the list, so that you're not only seeing employees who meet the specified filter criteria. For example, you could use this functionality to find all employees who work at a specific location.

To filter employee records, complete the following steps:

1. Click the **Filter** button.
2. If the field you want to filter is not already listed on the **Filter** panel, complete the following steps:
   a. Click the **Add Filter** button.
   b. In the dialog box provided, select the filters you want to add:



   c.
   d. Click the **Update** button.
3. Specify the appropriate filter criteria using the parameters provided.
4. Click the **Apply Filter** button.

Save a Favorite Filter

If you need to refer to the same set of employees frequently, it can be helpful to save the filter as a favorite. For example, if you frequently need to view employee records for managers, you can save a favorite filter that displays employees assigned a manager position.

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To save a filter as a favorite, complete the following steps:

1. Follow the steps in the task above to apply the necessary filter.
2. In the **Favorites** drop-down list, select **Save Favorite As**.
3. Enter a name.
4. (Optional) To load the filter by default each time you open the **People List**, select the **Load by Default** checkbox.
5. Click the **Save** button.

To load a filter that you've saved as a favorite, simply select it from the Favorites drop-down list.

Manage Favorite Filters

If necessary, you can delete your favorite filters or update which one loads by default.

To manage your favorite filters, complete the following steps:

1. In the **Favorites** drop-down list, select **Manage Favorites**.
2. Click the favorite you want to update.
3. Do any of the following actions:
    a. To delete the favorite, click the **Delete** button.
    b. To load the favorite by default, click the **Load by Default** button.
    c. To stop loading the favorite by default, click the **Clear Default** button.
4. Repeat steps 2 to 3 for any other favorites you want to update.
5. Click the **Save** button.

Sort and View Employee Records

You can either view individual employee records or load a number of records that you can then navigate between.

You can sort the records by clicking the column header. Click again to toggle between ascending and descending order.

Note: When the grid is loaded, it is populate with 50 records, so the 50 records will be sorted. When you scroll to the bottom of the list, another 50 records are loaded, and when the grid is populated and sorted again, all 100 records are sorted.

To view a single employee record, simply click the employee's name in the list:

To load multiple employee records, complete the following steps:

1. Select the checkboxes next to the records you want to open:

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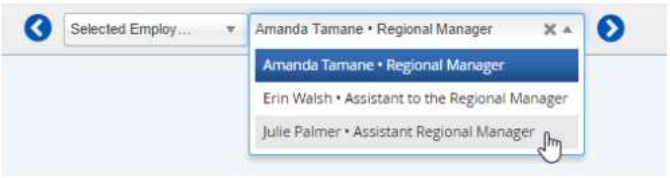
2. Click the View Profiles button.
3. Navigate between the profiles you've selected by doing one of the following actions:
    a. Click the left and right arrows:

    b. Select the employee from the drop-down list:



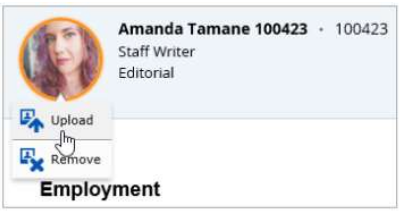
View Audit Information

The application tracks historical changes made to employees' records. To view audit records, click the **Audit** button on any screen on which it appears.

The button open the **Audits** panel, which displays changes to the employee's record by date. The type and number of changes made are displayed on each audit record.

Add an Employee Image

You can add a profile image to an employee's record on the **People** feature. Once you have loaded an employee, you can access the controls by clicking on the employee's profile image.



You can Upload or Remove an employee's profile image by clicking the buttons on the drop-down.

Screens

Before You Begin: This section assumes that you already have an employee record open.

Within each employee record, information is displayed across a number screens. To navigate between the screens, click the corresponding item in the sidebar:

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If the sidebar is collapsed, you can view the list of screens by doing either of the following actions:

- Click the expand sidebar icon:

- Select a tab from the drop-down list:

The remainder of this sections describes each screen.

Overview

The overview screen displays high-level information about the employee, such as their hire date, department, and group. Although none of the information on this screen is editable, you can click the View More links in some of the sections to navigate to the appropriate screen where you can update the information. You can also click the Refresh button to update the information to reflect recent edits on other screens or in other areas of the application.

The information is divided into the following sections:

Section	Description
Business Contacts	View your employee's business contact information, such as their email address and phone numbers:

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Compensation	View your employee's pay information, such as pay frequency and pay group. The application does not automatically display the employee's salary or pay rate, but you can view it in this section by clicking the View link. You can click the View more link to view the Employment>Employment, Compensation and Policy Settings screen:
Employment	View basic employment information, including your employee's hire date and status (Active, Inactive, etc.). You can click the View more link to view the Employment>Employment, Compensation and Policy Settings screen:
Time Away Balances	View your employee's remaining balances. The application displays the employee's first three active balances in alphabetical order:
Work Assignment	View your employee's primary work assignment. If the position has a business title assigned, the application displays it here. You can click the View more link to view the Work>Work Assignments screen:

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