



The UNIVERSITY *of* OKLAHOMA

Manager Functions

Time & Attendance

Experience the Workforce system from the employee perspective. Learn Workforce navigation fundamentals and functions related to reporting time, activities, and absences in the system.

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

University time system:
<http://time.ou.edu>

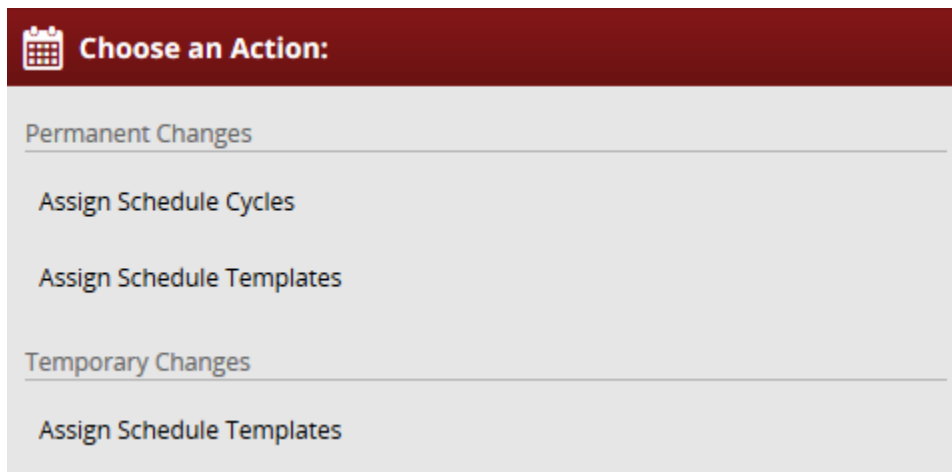
Working with Schedules

There are a variety of ways to assign schedules, develop, or edit them in Workforce. This chapter describes each of the methods available to you.

Standard Schedule Assignment

Workforce has basic scheduling functionality for departments to utilize when it is beneficial for their organization. Once schedules and schedule cycles (optional, for rotating schedule needs) have been created, managers can easily assign them to individuals or to groups of employees.

1. To assign either a permanent or temporary schedule template, begin by selecting **Assign Schedules** from the **Schedules** area of the dashboard. The **Schedule Maintenance** window appears.
- 2.



Choose **Assign Schedule Templates** from the **Permanent Changes** section or **Assign Schedule Templates** from the **Temporary Changes** section.

Assigning Permanent Schedule Templates

An administrator may develop schedule templates for employees with work activities that follow a regular pattern from pay period to pay period. Managers can then assign the schedule template once and have it applied on a permanent basis to successive pay periods.

1. In the **Permanent Changes** area of the Schedule Maintenance window, click **Assign Schedule Templates**.
Select an assignment group from the assignment tree on the left. A window appears listing the employees in the selected group.

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- For a Mass Edit, select the checkbox next to the names of the employees you wish to change.
- Click on the Mass Edit checkbox.
- From the **Schedule Template** drop-down list, select the correct schedule template.
- Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.

The screenshot shows the 'Permanent Schedule Template Assignment' window. On the left, there is a sidebar with 'Assignments' including categories like 'All (13650)', 'Exempt', 'Non-Exempt', 'ACA Reporting Exempt Monthly (2550)', 'Biweekly Hourly (2526)', 'Faculty Exempt Monthly (1135)', 'Non-Contract Exempt Monthly (2127)', 'Peak Hourly (184)', 'Temporary Hourly (5128)', and 'Lewis Starkey's Employees (5)'. The main table has the following data:

Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018

At the bottom, the 'Mass Edit' section is active, showing a checked checkbox, a dropdown menu set to 'Hourly 8am to 5pm - 1 Hr', an 'Effective Date' field with '03/24/2018', and an 'Apply to all checked rows' button.

- For individual edits, select the **Manager Override** checkbox to make the **Schedule Template** field active.

The screenshot shows the 'Permanent Schedule Template Assignment' window. The 'Manager Override' checkbox for the first row is checked, and the 'Effective Date' field is populated with '03/24/2018'. The table data is as follows:

Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
[Employee Name]	Schedule Template	<input checked="" type="checkbox"/>	Hourly 8am to 5pm - 1 Hr	03/24/2018	02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None	MM/dd/yyyy	02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input checked="" type="checkbox"/>	None	MM/dd/yyyy	02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
[Employee Name]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018

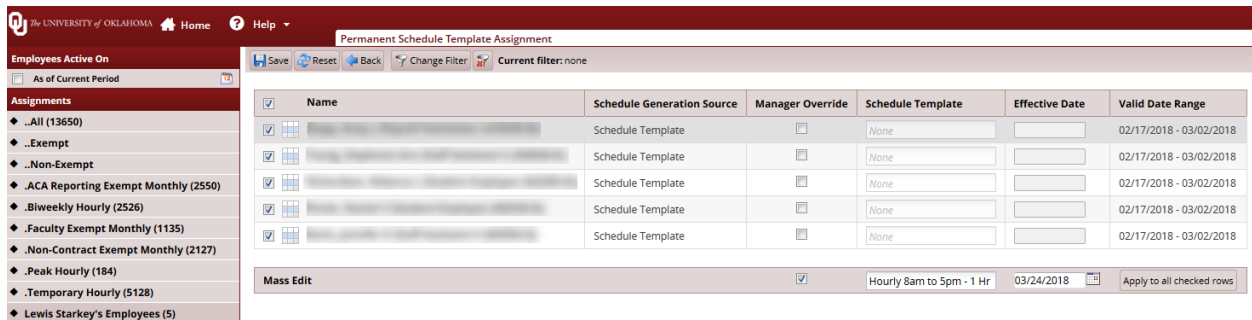
The 'Mass Edit' section at the bottom is inactive, showing an unchecked checkbox, a dropdown menu set to 'None', and an 'Apply to all checked rows' button.

- From the **Schedule Template** drop-down list, select the correct schedule template.
- Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.
 - The recommended best practice is to select the first date in the pay period whenever possible.
 - A second recommended best practice is to select the first date in the work week.
- After completing your permanent schedule template assignments, choose how to proceed.
 - Click the **Save** icon to save your changes.
 - Click the **Reset** icon to clear your changes and start again.
 - Click the **Back** icon to return to the Schedule Maintenance window without saving your changes.

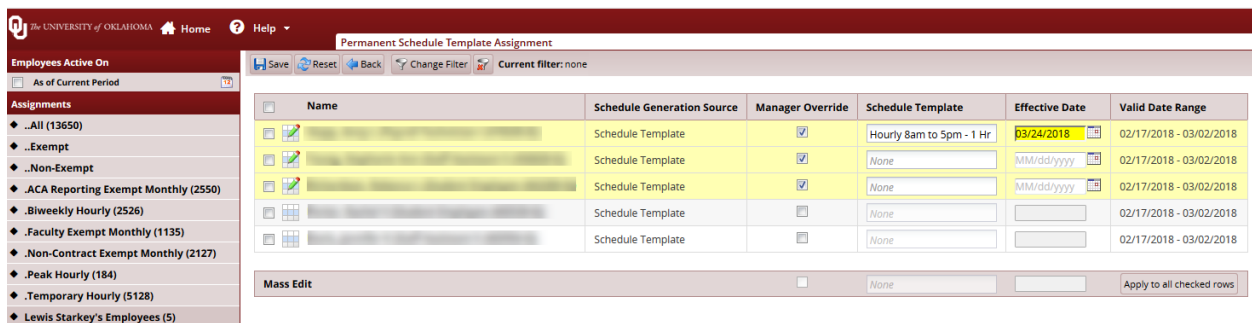
Assigning Temporary Schedule Templates

An administrator may develop schedule templates for employees to follow on a temporary basis; i.e., within a specific pay period or for a limited length of time. Managers can then assign the schedule template on an “as needed” basis.

1. In the **Temporary Changes** area of the Schedule Maintenance window, click **Assign Schedule Templates**.
Select an assignment group from the assignment tree on the left. A window appears listing the employees in the selected group.
2. For a Mass Edit, select the checkbox next to the names of the employees you wish to change.
3. Click on the Mass Edit checkbox.
4. From the **Schedule Template** drop-down list, select the correct schedule template.
5. Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.



6. For individual edits, select the **Manager Override** checkbox to make the **Schedule Template** field active.



7. From the **Schedule Template** drop-down list, select the correct schedule template.

8. Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.
 - The recommended best practice is to select the first date in the pay period whenever possible.
9. A second recommended best practice is to select the first date in the work week.
10. After completing your temporary schedule template assignments, choose how you want to proceed.



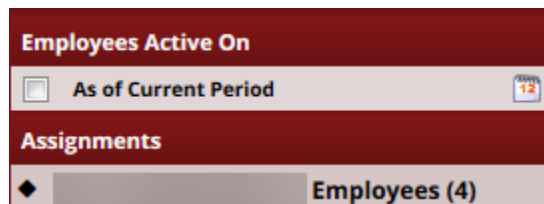
- Click the **Save** icon to save your changes.
- Click the **Reset** icon to clear your changes and start again.
- Click the **Back** icon to return to the Schedule Maintenance window without saving your changes.

Schedule assignments using this method will remain in effect for exactly one pay period. After that, the employee will revert back to his or her normally assigned schedule.

Assigning Schedules to Dates Outside of Current Pay Period

Managers can schedule employees for assignments to dates outside of the current pay period. Examples are employees with schedules different from other assignments, or for employees who will be temporarily working on a project or schedule that is outside of their normal duties.

1. To assign either a permanent or temporary schedule template, begin by selecting **Assign Schedules** from the **Schedules** area of the dashboard. The **Schedule Maintenance** window appears.
2. In the Permanent Changes area of the Schedule Maintenance window, click Assign Schedule Templates.
3. Click the checkbox below **Employees Active On** and select the week you want to assign from the calendar. The range in the **Valid Date Range** column at the right of the screen will change to a pay period that includes the week you've just selected.



4. Select an assignment group from the assignment tree on the left. A window appears that lists the employees in the selected group.

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- For a Mass Edit, select the checkbox next to the names of the employees you wish to change.
- Click on the Mass Edit checkbox.
- From the **Schedule Template** drop-down list, select the correct schedule template.
- Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.

<input checked="" type="checkbox"/>	Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
<input checked="" type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input checked="" type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input checked="" type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input checked="" type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input checked="" type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input checked="" type="checkbox"/>	Mass Edit		<input checked="" type="checkbox"/>	Hourly 8am to 5pm - 1 Hr	03/24/2018	Apply to all checked rows

- For individual edits, select the **Manager Override** checkbox to make the **Schedule Template** field active.

<input type="checkbox"/>	Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
<input type="checkbox"/>	[Redacted]	Schedule Template	<input checked="" type="checkbox"/>	Hourly 8am to 5pm - 1 Hr	03/24/2018	02/17/2018 - 03/02/2018
<input type="checkbox"/>	[Redacted]	Schedule Template	<input checked="" type="checkbox"/>	None	MM/dd/yyyy	02/17/2018 - 03/02/2018
<input type="checkbox"/>	[Redacted]	Schedule Template	<input checked="" type="checkbox"/>	None	MM/dd/yyyy	02/17/2018 - 03/02/2018
<input type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input type="checkbox"/>	[Redacted]	Schedule Template	<input type="checkbox"/>	None		02/17/2018 - 03/02/2018
<input type="checkbox"/>	Mass Edit		<input type="checkbox"/>	None		Apply to all checked rows

- From the **Schedule Template** drop-down list, select the correct schedule template.
- Enter the date on which to begin the schedule in the **Effective Date** field. The date must fall within the period defined in the **Valid Date Range** field.
- After completing your future dated schedule template assignments, choose how you want to proceed.
 - Click the **Save** icon to save your changes.
 - Click the **Reset** icon to clear your changes and start again.
 - Click the **Back** icon to return to the Schedule Maintenance window without saving your changes.

Edit an Assigned Schedule

Employees are occasionally asked to deviate from their normal schedule for a very short amount of time, perhaps a single day or one week. When that happens, it can be easier to change the schedule from the Manager Time Entry window. This method works well for assignments with schedules that are different than most other assignments or for employees who temporarily work on a project or schedule outside of their normal duties.

1. Use the Schedule tab from the Edit Employee Time window.
2. Select an assignment group.
3. Select an employee to develop individual schedules for employee assignments.

Messages		Results		Schedule		Time Off																								
T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	Feb 3, 2018 to Feb 9, 2018		Show All Weeks
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28			
Pay Code		Sat 02/03		Sun 02/04		Mon 02/05		Tue 02/06		Wed 02/07		Thu 02/08		Fri 02/09		Total														
+ Schedule In/Out						08:00 am		08:00 am		08:00 am		08:00 am		08:00 am		20.00														
+ Schedule In/Out						12:00 pm		12:00 pm		12:00 pm		12:00 pm		12:00 pm		20.00														
						01:00 pm		01:00 pm		01:00 pm		01:00 pm		01:00 pm																
						05:00 pm		05:00 pm		05:00 pm		05:00 pm		05:00 pm																
		0.00		0.00		8.00		8.00		8.00		8.00		8.00		40.00														

Schedule changes using this method will remain in effect only for the dates affected. After that, the employee will revert back to his or her normally assigned schedule.

Other Manager Functions

Managers have responsibilities to perform other tasks in Workforce such as assigning schedules or approving timesheets. Each of those additional functions is described in this chapter.

End-of-Period Reminders

At the end of each pay period, most time entry employees will submit their timesheets, and managers will review and approve employee timesheets using the Approve Timesheets function. Reminder messages are sent to remind employees that timesheets need to be entered and submitted near or at the end of a work period. Reminders are sent to remind managers to approve employee timesheets. Reminders are sent only to managers who have not approved all of their employee timesheets. Reminder e-mails are sent as indicated in the following table.

Date/Time	Sent to
Two days before End of Period	Employee email 1- noon
One day after period end	Employee email 2- 6am
One day after period end	Manager Reminder 1- 10am
One day after period end	Manager Reminder 2- 3pm