

Miami-Dade County



End-User Training Guide

Course Code: DPR 303

Course: Departmental HR - Time Management

Course Overview

Course Description	<p>This course provides a comprehensive review of the Time Management processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: Time Management<ul style="list-style-type: none">○ Submit Time and Absence on Behalf on an Employee○ Approve Time○ Approve Absence○ Manage Exceptions○ Manage Work Schedule○ Maintain Teleworker• Module 3: Course Summary
Training Audiences	<p>The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:</p> <ul style="list-style-type: none">• Department Personnel Representative (DPR)• Timekeepers
Prerequisites	<p>Participants are required to complete the following End-User Training courses prior to starting this course:</p> <ul style="list-style-type: none">• ERP 101 – Overview of INFORMS• ERP 102 – INFORMS Navigation and Online Help• HCM 101 – Human Resources Fundamentals
Other Related Courses	<p>Participants can attend the other related courses to Departmental HR:</p> <ul style="list-style-type: none">• DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)• DPR 302 – Departmental HR - Personnel Changes• DPR 304 – Departmental HR - Updating Team Information• DPR 321 – Departmental HR – Recruitment
Delivery Method	<p>This course is intended to be delivered through Instructor-led Training.</p>
Estimated Duration	<p>The total duration of this course, when delivered through Instructor-led Training, is 6 Hours</p>

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Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To receive credit for completing this course, which is necessary to be granted system access for performing related tasks in INFORMS, participants must:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

Course Learning Objectives At the conclusion of this course, participants will be able to:

- Submit Time and Absence on Behalf on an Employee
- Approve an employee's time on behalf of a Manager
- Approve Absence
- Understand and resolve the different severity levels of exceptions
- Manage Work Schedule
- Maintain Teleworker
- Reports & Queries

Module 1: Course Introduction

Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

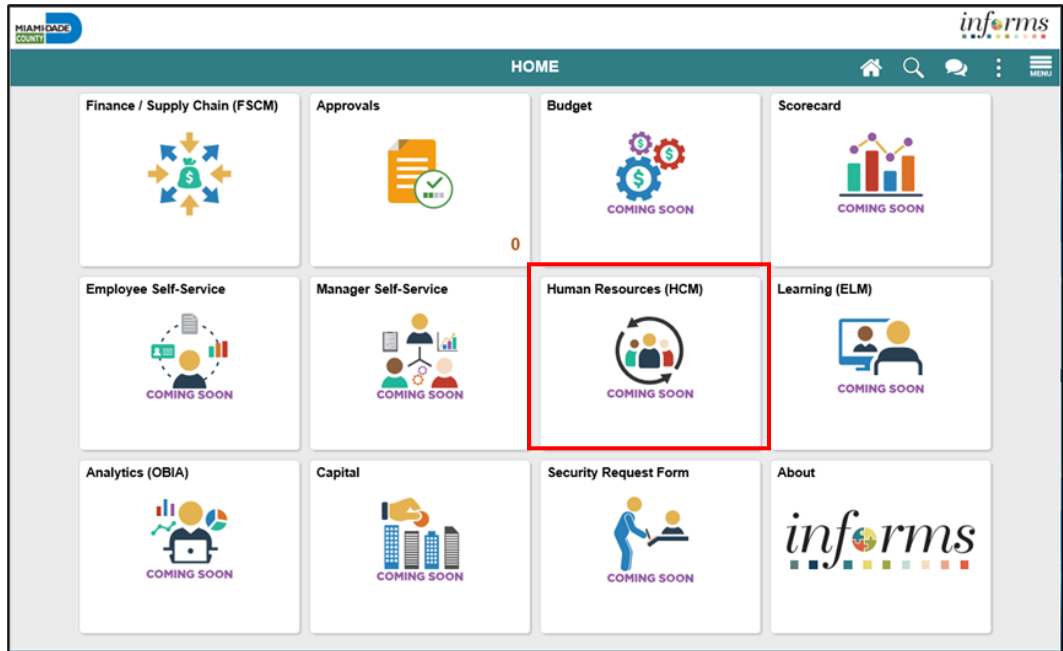
Roles and Responsibilities

- **Department Personnel Representative (DPR):** The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
- **Timekeeper:** The Timekeeper is only responsible for entering time for employees in specific departments.

Module 1: Course Introduction

Navigation

1. Login to the INFORMS and select **Human Resource (HCM)** from the home landing page.



Module 1: Course Introduction

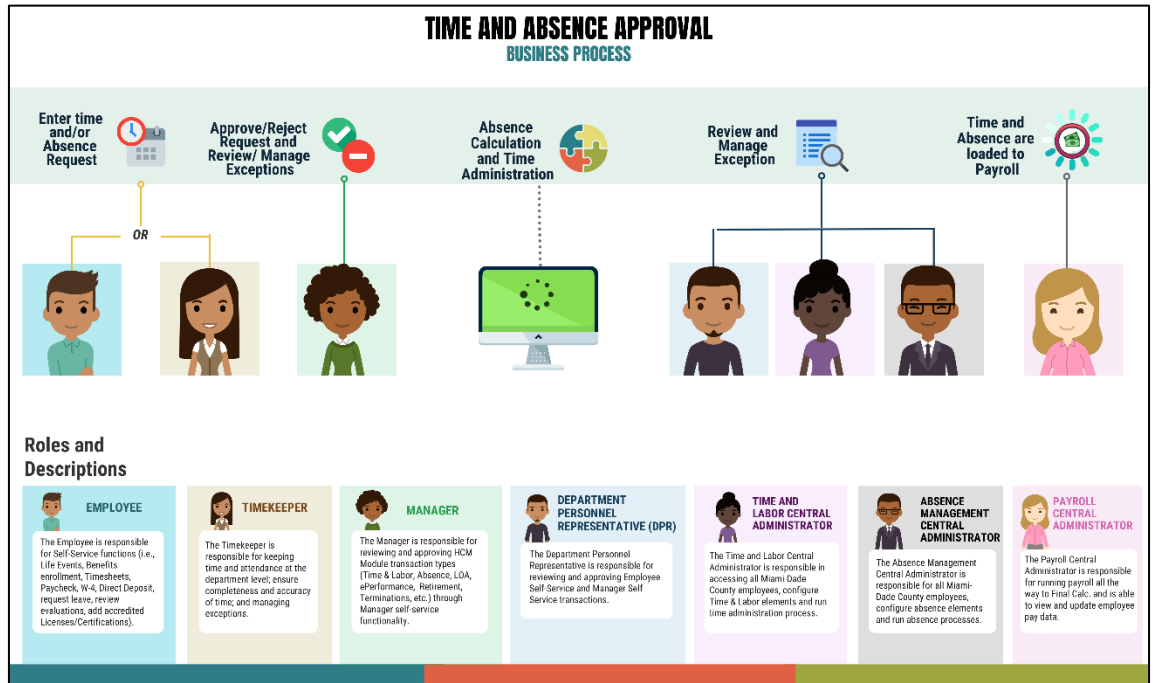
Purpose and Benefits of the Business Process

The purpose and benefits of the Time Management business process include:

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities)
- Reduction of processing time
- Enhanced Reporting
- Consolidated Benefit Billing System – Leave of Absence (LOA), retirees, and benefit billing all in one system

Module 1: Course Introduction

The End-to-End Business Process



Module 1: Course Introduction

Introduction to Demonstrations and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

Instructor Demo



Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The Instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content.

Module 1: Course Introduction

Module 1: Course Introduction Summary

The following key concepts were covered in this module:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 2: Time Management

Module 1:

Course

Introduction

Summary

The following key concepts were covered in this module:

- Submit Time and Absence on Behalf on an Employee
- Approve Time
- Approve Absence
- Manage Exceptions
- Manage Work Schedules
- Reports and Queries

Lesson 1: Submit Time and Absence on Behalf of an Employee

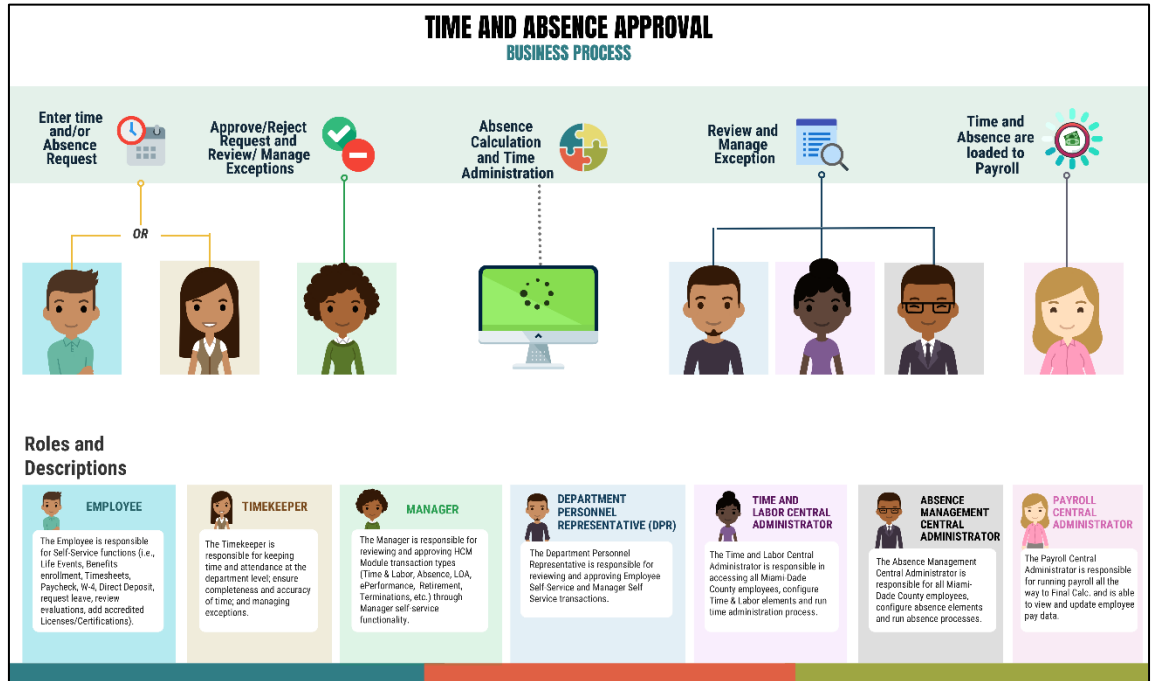
Lesson 1: Overview

At the conclusion of this lesson, you will be able to:

- Submit an employee's time and absences on behalf of the employee

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lesson 1: Introduction



Lesson 1: Submit Time and Absence on Behalf of an Employee

Key Terms



The following key terms are used in this module:

Term	Definition
N/A	N/A

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 1:
Submit Time
and Absence on
behalf of an
Employee

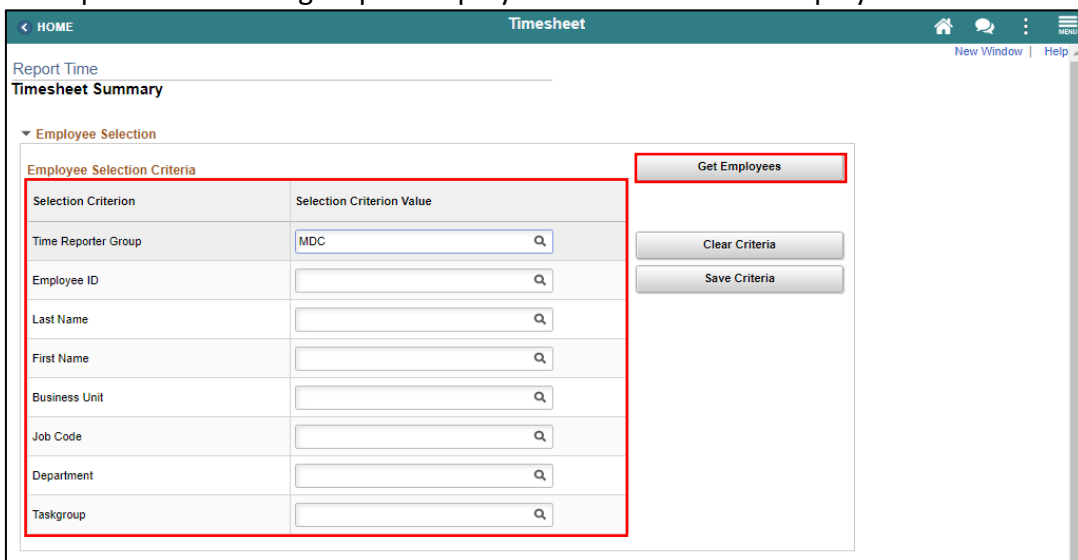
Submit Time on behalf of a Employee

The following steps outline how the Department Personnel Representative can submit a timesheet on behalf of the employee if the employee is unable to report it.

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 1:
Submit Time on behalf of an Employee

- Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Dionte Sowers, Totals From 05/02/2022 - 05/08/2022

Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence
Abney	Levy	00138064	Airport Operations Agent	40.00	40.00	40.00		
Abram	Finley	00079173	Airport Operations Sr Agent	0.00	0.00	40.00		

- Entered time and select the appropriate **Time Reporting Code** before Submitting the employee's time.

Timesheet

Levy, Abney Employee ID 00138064
Airport Operations Agent Empl Record 0
Earliest Change Date 11/29/2021

Select Another Timesheet

*View By: Week *Date: 05/02/2022

Reported Hours 48.00

From Monday 05/02/2022 to Sunday 05/08/2022

Mon 5/2	Tue 5/3	Wed 5/4	Thu 5/5	Fri 5/6	Sat 5/7	Sun 5/8	Total	Time Reporting Code
					8.00	8.00	16.00	DAYSO - Day Shift Overtime
8.00	8.00	8.00					24.00	REG - Regular Time

- Select **Submit**.

Timesheet

Chrishawn Arsenaunt Employee ID 00053129
Supv. Hr Testing & Validation Empl Record 0
Earliest Change Date 11/01/2021

Select Another Timesheet

*View By: Week *Date: 05/16/2022

Reported Hours 0.00

Earliest Change Date is too far back to run Rules in viewed period. Limit is 6 months.

From Monday 05/16/2022 to Sunday 05/22/2022

Mon 5/16	Tue 5/17	Wed 5/18	Thu 5/19	Fri 5/20	Sat 5/21	Sun 5/22	Total	Time Reporting Code
					8.00	8.00		DAYS - Day Shift
8.00	8.00	8.00						REG - Regular Time

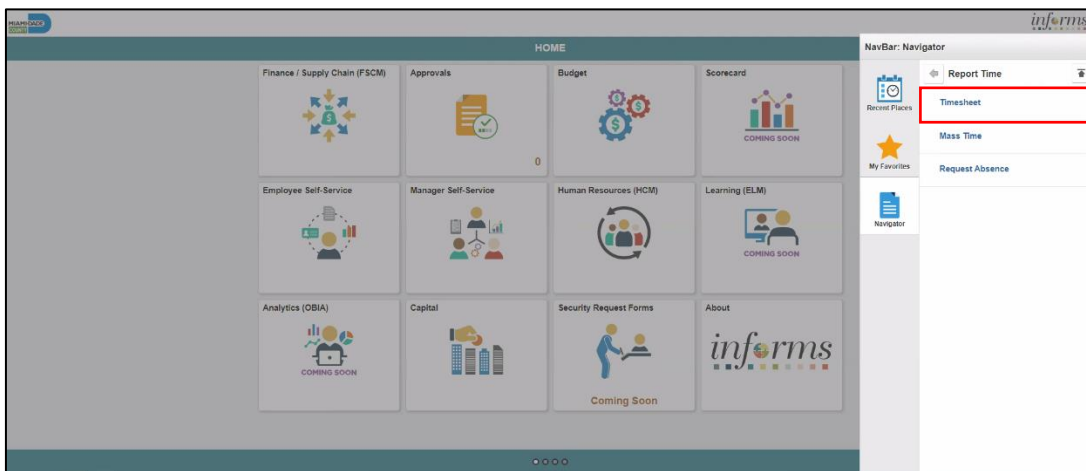
Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 2:
Submit Absence
on behalf of an
Employee

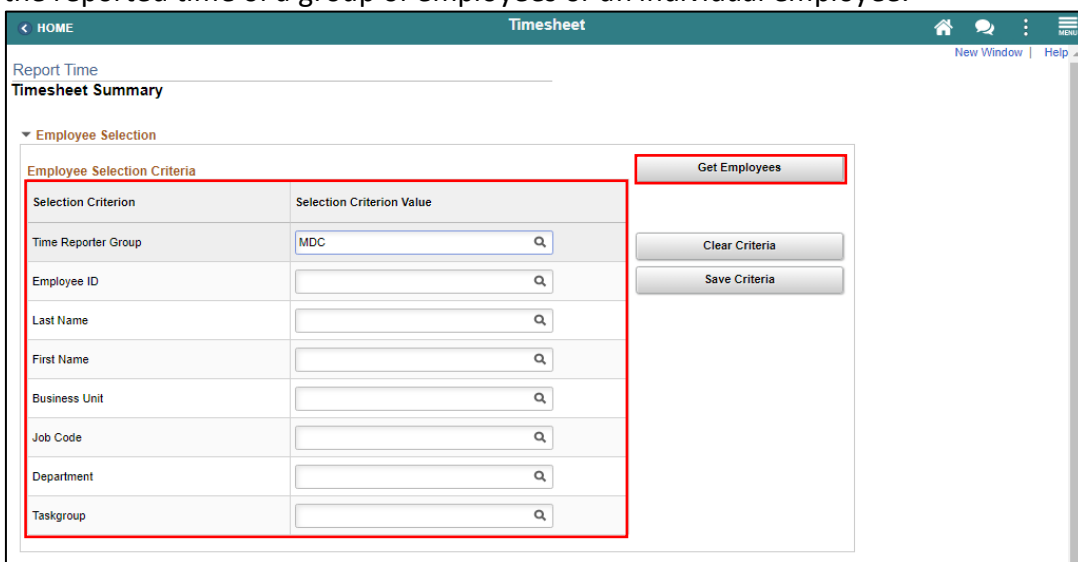
Submit Absence on Behalf of an Employee

The following steps outline how the Department Personnel Representative can submit an absence request on behalf of the employee.

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 2: Submit Absence on behalf of an Employee

3. Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Dionte Sowers, Totals From 05/02/2022 - 05/08/2022

Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence
Abney	Levy	00138064	Airport Operations Agent	40.00	40.00	40.00		
Abram	Finley	00079173	Airport Operations Sr Agent	0.00	0.00	40.00		

4. Select the appropriate week for the Absence Request.
Note: If the corresponding absence request is outside of the week indicated in this selection, the absence request will not be submitted.

Timesheet
Lacey Abney, Airport Operations Agent
Employee ID: 00138064
Empl Record: 0
Earliest Change Date: 11/29/2021

Select Another Timesheet
View By: Week
Date: 05/23/2022
Reported Hours: 42.00

Mon 5/23	Tue 5/24	Wed 5/25	Thu 5/26	Fri 5/27	Sat 5/28	Sun 5/29	Total	Time Reporting Code	*Taskgroup	Task Profile ID	Assignment
					8.00	8.00	16.00	DAYSO - Day Shift Overtime	06325007		
8.00	8.00	8.00					24.00	REG - Regular Time	06325007		
2.00							2.00	ANNIL - Annual Leave	05325007		

Buttons: Submit, Reported Time Status, Summary, Absence, Exceptions, Payable Time

5. Scroll to the **Absence** tab at the bottom of the employee timesheet.

Reported Time Status | Summary | **Absence** | Exceptions | Payable Time

Absence Events

Select	*Start Date	End Date	Absence Name	Reason	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Edit
<input type="checkbox"/>						Details		Approval Monitor	Administrator Absence Event	<input type="checkbox"/>	Edit

Add Absence Event

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 2:
Submit Absence
on behalf of an
Employee

6. Select **Add Absence Event**.

The screenshot shows the 'Absence Events' tab in a software interface. At the bottom of the interface, there is a red-bordered button labeled 'Add Absence Event'.

7. Enter the following information:

- **Start Data and End Date**
- **Absence Name***

The screenshot shows the 'Absence Events' interface with a table. The first row of the table has the following data: Start Date: 05/23/2022, End Date: 05/23/2022, Absence Name: Annual Leave, Duration: 8.00 Hours, Unit Type: Hours, Status: Saved, Approval Monitor: Approval Monitor, Source: Manager Timesheet. The 'Start Date', 'End Date', and 'Absence Name' columns are highlighted with a red border.

Note: For Administrative Leave, INFORMS requires a Reason to be added. A **Reason** field will populate for entry. Reasons will not be required for other types of leave request.

8. Select **Forecast** to confirm if the employee is eligible for the absence type.

The screenshot shows the 'Absence Events' interface with the same table as the previous screenshot. The 'Forecast' button in the 'Forecast' column of the first row is highlighted with a red border.

Note: To submit Absence Event, Timekeepers must forecast prior to submitting the leave request.

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 2: Submit Absence on behalf of an Employee

INFORMS provides confirmation if the employee is eligible for the absence type. INFORMS will confirm if the eligibility has been verified and if the employee can submit absence.

Select	*Start Date	End Date	Absence Name	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
<input type="checkbox"/>	05/23/2022	05/23/2022	Annual Leave	8.00	Hours	Details	Saved	Approval Monitor	Manager Timesheet	<input type="checkbox"/>	Forecast	Edit

9. Select **Submit**.

Mon 5/23	Tue 5/24	Wed 5/25	Thu 5/26	Fri 5/27	Sat 5/28	Sun 5/29	Total	Time Reporting Code	*Taskgroup	Task Profile ID	Assignment	OCL Jobcode	Source
8.00							8.00	ANNL - Annual Leave	PSNCONCATSK				Absence Management

10. Select **OK**.

Submit Confirmation

The Submit was successful.
 Time for the Week of 2022-05-23 to 2022-05-29 is submitted

Lesson 1: Submit Time and Absence on Behalf of an Employee

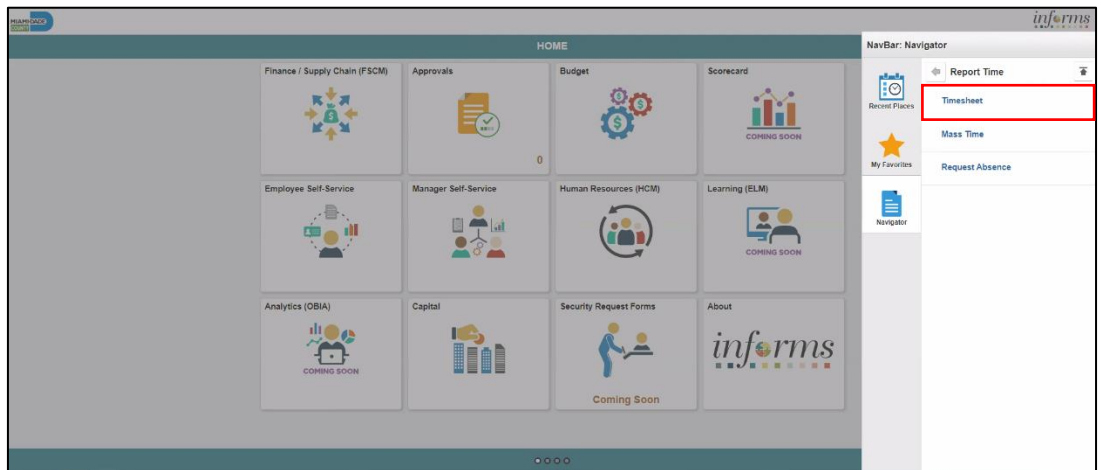
**Lecture 3:
Submit Partial
Absence on
behalf of an
Employee**

In addition to the all-day absence, Timekeepers can submit partial day absences on behalf of an employee. Partial day absences can take place for many reasons and in certain circumstances, partial-day absences are required to be submitted in INFORMS before the end of the pay period.

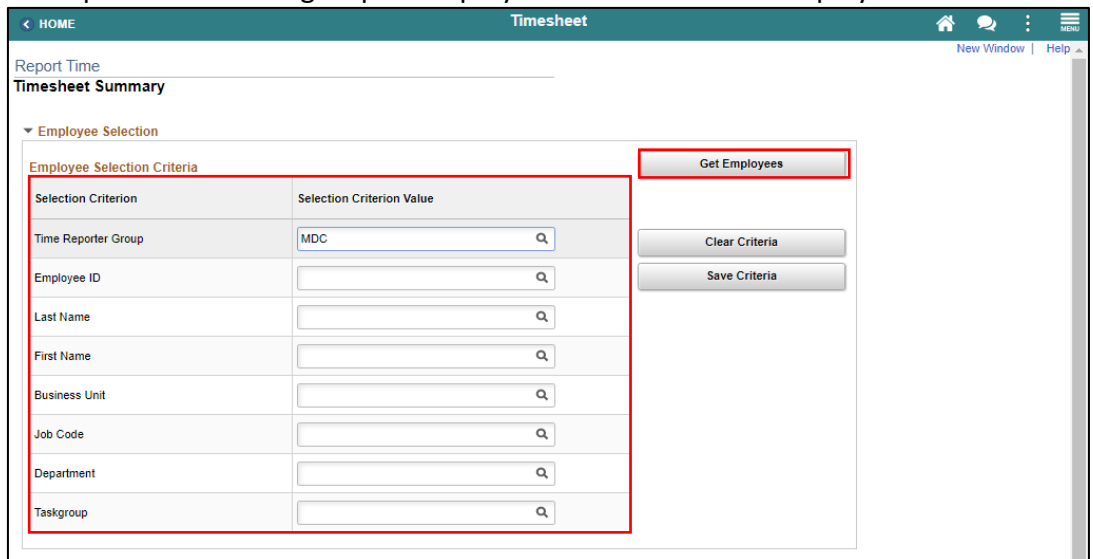
Submit Partial Day Absence on Behalf of an Employee

The following steps outline how the Timekeeper can submit an partial day absence request on behalf of the employee.

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 3: Submit Partial Absence on behalf of an Employee

3. Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Dionte Sowers, Totals From 05/02/2022 - 05/08/2022

Time Summary		Demographics						
Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence
Abney	Levy	00138064	Airport Operations Agent	40.00	40.00	40.00		
Abram	Finley	00079173	Airport Operations Sr Agent	0.00	0.00	40.00		

4. Select the appropriate week for the Absence Request.
Note: If the corresponding absence request is outside of the week indicated in this selection, the absence request will not be submitted.

Timesheet

Levy Abney Employee ID 00138064
 Airport Operations Agent Empl Record 0
 Actions - Earliest Change Date 11/29/2021

Select Another Timesheet

*View By Week
 *Date 05/23/2022

Reported Hours 42.00

From Monday 05/23/2022 to Sunday 05/29/2022

Mon 5/23	Tue 5/24	Wed 5/25	Thu 5/26	Fri 5/27	Sat 5/28	Sun 5/29	Total	Time Reporting Code	*Taskgroup	Task Profile ID	Assignment
					8.00	8.00	16.00	DAYSO - Day Shift Overtime	06325007	Q	Q
8.00	8.00	8.00					24.00	REG - Regular Time	06325007	Q	Q
2.00							2.00	ANNL - Annual Leave	06325007		

Submit

Reported Time Status Summary Absence Exceptions Payable Time

Reported Time Status

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 3:
Submit Partial
Absence on
behalf of an
Employee

5. Scroll to the **Absence** tab at the bottom of the employee timesheet.

Select	*Start Date	End Date	Absence Name	Reason	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Edit
<input type="checkbox"/>						Details		Approval Monitor	Administrator Absence Event	<input type="checkbox"/>	Edit

6. Select **Add Absence Event**.

7. Enter the following information:

- **Start Data and End Date**
- **Absence Name***

Select	*Start Date	End Date	Absence Name	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
<input type="checkbox"/>	05/23/2022	05/23/2022	Annual Leave	8.00	Hours	Details	Saved	Approval Monitor	Manager Timesheet	<input type="checkbox"/>	Forecast	Edit

Note: For Administrative Leave, INFORMS requires a Reason to be added. A **Reason** field will populate for entry. Reasons will not be required for other types of leave request.

8. Select **Details**.

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 3:
Submit Partial
Absence on
behalf of an
Employee

9. In the Absence Event Details page, the following fields are available:
- **State Date***
 - **End Date**
 - **Filter by Type**
 - **Absence Name***
 - **Partial Days**
 - **Duration**

Note: Fields with asterisks (*) are required fields.

10. Enter the **Start Date**.

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 3:
Submit Partial
Absence on
behalf of an
Employee

11. Enter the **Absence Name**.

The screenshot shows the 'Absence Detail' form with the following fields:

- *Start Date: 05/23/2022
- End Date: 05/23/2022
- Filter by Type: All
- *Absence Name: Annual Leave (highlighted with a red box)
- Partial Days: None
- Duration: [] Hours
- Current Balance: 474.25 Hours**
- Buttons: Calculate Duration, View Monthly Calendar

12. Select the **Partial Days**.

- All Days
- End Day Only
- None
- Start Day Only
- Start and End Days

The screenshot shows the 'Absence Detail' form with the following fields:

- *Start Date: 05/23/2022
- End Date: 05/23/2022
- Filter by Type: All
- *Absence Name: Annual Leave
- Partial Days: None (highlighted with a red box)
- Duration: [] Hours
- Current Balance: 474.25 Hours**
- Buttons: Calculate Duration, View Monthly Calendar

13. Enter the **All Days Hours**.

Note: Once the **Partial Days** are selected the **All Days Hours** field will populate.

The screenshot shows the 'Absence Detail' form with the following fields:

- *Start Date: 05/23/2022
- End Date: 05/23/2022
- Filter by Type: All
- *Absence Name: Annual Leave
- Partial Days: All Days
- All Days Hours: 8.00 (highlighted with a red box)
- Duration: 8.00 Hours
- Current Balance: 474.25 Hours**
- Buttons: Calculate Duration, View Monthly Calendar

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 3: Submit Partial Absence on behalf of an Employee

14. Select **Calculate Duration**.

The screenshot shows the 'Absence Detail' form. Fields include: *Start Date (05/23/2022), End Date (05/23/2022), Filter by Type (All), *Absence Name (Annual Leave), Partial Days (All Days), All Days Hours (2.00), and Duration (2.00 Hours). A 'Calculate Duration' button is highlighted with a red box. A 'Current Balance 474.25 Hours**' is also visible.

15. If needed, add comments in the **Reporter Comments** field.

The screenshot shows the 'Comments' section with a 'Reporter Comments:' label and an empty text input field highlighted with a red box.

16. Select **OK**.

The screenshot shows the full 'SS Create Absence Req' dialog box. It includes a user profile for 'Chrisawn Arsenault', instructions, and the 'Absence Detail' form from step 14. The 'Reporter Comments' field is also visible. At the bottom, the 'OK' button is highlighted with a red box, and a 'Cancel' button is also present.

Lesson 1: Submit Time and Absence on Behalf of an Employee

Lecture 3:
Submit Partial
Absence on
behalf of an
Employee

17. Select **Forecast** to confirm if the employee is eligible for the absence type.

Select	*Start Date	End Date	Absence Name	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
<input type="checkbox"/>	05/23/2022	05/29/2022	Annual Leave	2.00	Hours	Details	Saved	Approval Monitor	Manager Timesheet	<input type="checkbox"/>	Forecast	Edit

Note: To submit Absence Event, Timekeepers must forecast prior to submitting the leave request.

18. Select **Submit**.

Timesheet

Chrishaan Arsenauff
Supv. H Testing & Validation

Employee ID: 00053129
Empl Record: 0
Earliest Change Date: 11/01/2021

Select Another Timesheet

*View By: Week
*Date: 05/23/2022
Reported Hours: 8.00

Earliest Change Date is too far back to run Rules in viewed period. Limit is 6 months.

Mon 5/23	Tue 5/24	Wed 5/25	Thu 5/26	Fri 5/27	Sat 5/28	Sun 5/29	Total	Time Reporting Code	*Taskgroup	Task Profile ID	Assignment	OCL Jobcode	Source
8.00							8.00	ANRL - Annual Leave	PSNONCATSK				Absence Management

Submit Apply Schedule

Reported Time Status Summary **Absence** Exceptions Payable Time

Eligibility has been verified. You may now submit your absence.
Date Time: May 23, 2022 at 12:03

19. Select **OK**.

Timesheet

Submit Confirmation

The Submit was successful.

Time for the Week of 2022-05-23 to 2022-05-29 is submitted

OK

Lesson 1: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario A Manager is out of the office and unable to approve their employee's timesheets. As the Department Personnel Representative (DPR), you have access to all the Manager's employees.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 2: Approve Time

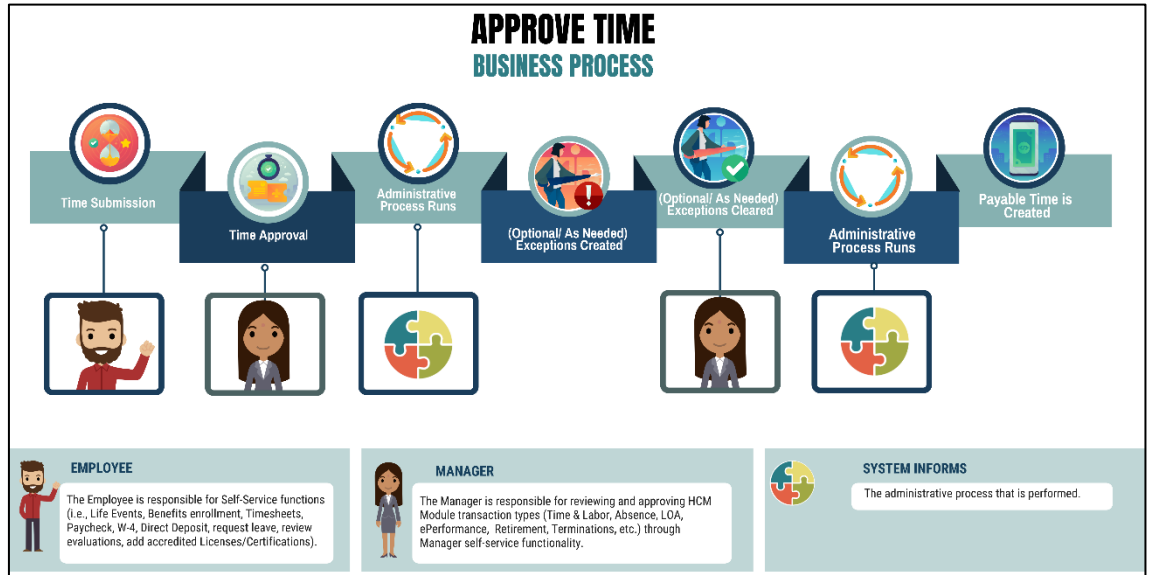
Lesson 1: Overview

At the conclusion of this lesson, you will be able to:

- Approve an employee's time on behalf of a Manager
- Learn the difference between Payable Time and Reported Time

Lesson 2: Approve Time

Lesson 2: Introduction



Lesson 2: Approve Time

Key Terms



The following key terms are used in this module:

Term	Definition
Exceptions	Any time reported that are not in compliance with the Pay Plan or Collective Bargaining Agreement (CBA) rules.
Payable Time	Time after it has been processed and rules applied to create differentials, supplements, and overtime.
Reported Time	Time as it is entered on the timesheet. This is what Managers will approve.
Task groups	Assigned to the employee, controls available Task Profiles on the timesheet.
Time Administration	INFORMS system process to trigger all the rules and generate exceptions.
Time Collection Devices (TCDs)	A method for collecting reported time outside of the online timesheet in Time and Labor.
Time Reporter Type	Determines the information of an employee must provide for work hours on the timesheet, Punched or Elapsed.
Time Reporting Codes (TRCs)	It is used to track various hours worked and pay supplements. Absences takes are mapped to TRCs and TRC are mapped to earning codes in Payroll.
Time Reporting Template	Determines fields used for time entry. There is an Elapsed Time Reporting Template and a Punch Time Reporting Template.
Workgroups	Grouping of employees that share common Time and Labor attributes and rules.

Lesson 2: Approve Time

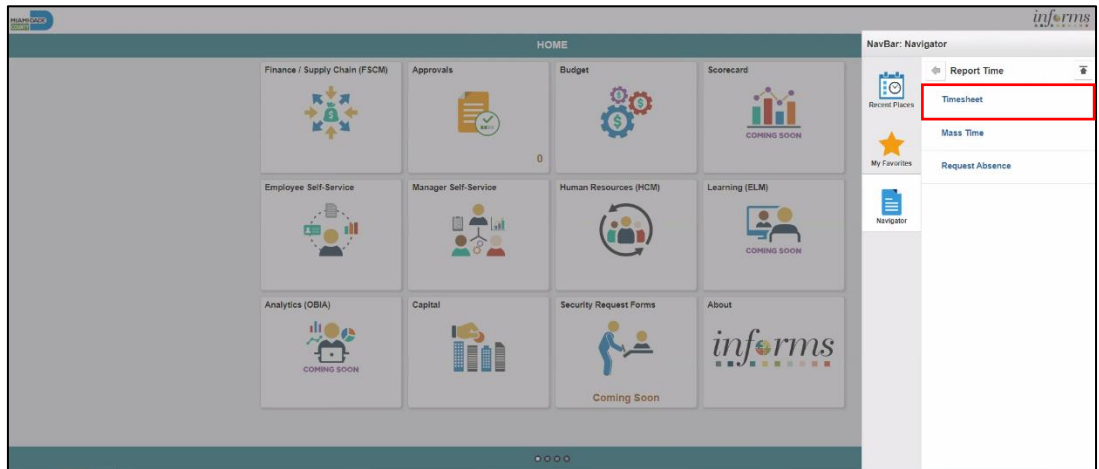
Lecture 1: Approve Time

Approving Time on behalf of a Manager

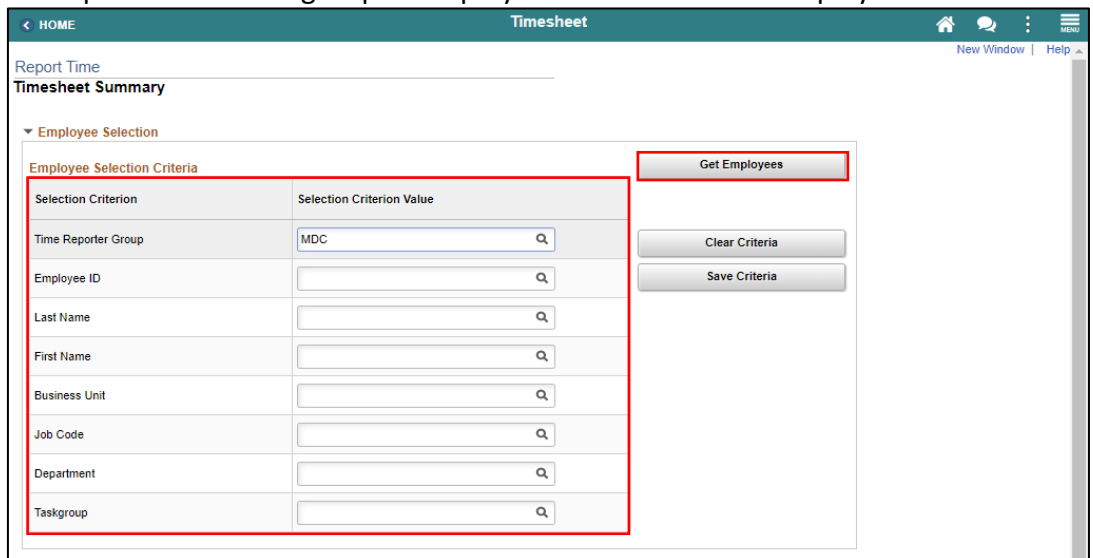
Employees may not get paid if the reported time is not approved. In the event that a manager is unable to review and approve an employee’s time, a Department Personnel Representative (DPR) can approve the time on the Manager’s behalf.

The following steps outline how to approve reported time:

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 2: Approve Time

Lecture 1: Approve Time

- Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Wulido Brann, Totals From 08/14/2023 - 08/20/2023

Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Dei
Abbey	Tamala	00323134	Police Officer	0.00	0.00	40.00			0.00	
Abel	Ludie	00401864	Mjpd Victim Advocate	0.00	0.00	40.00			0.00	
Abell	Keiondre	00033093	Police Officer	0.00	0.00	40.00			0.00	

- Review the entered time and the used **Time Reporting Code** before approving, denying, or pushing back the reported time.

Employee Self-Service Timesheet

Sun 8/13	Mon 8/14	Tue 8/15	Wed 8/16	Thu 8/17	Fri 8/18	Sat 8/19	Sun 8/20	Total	Time Reporting Code
1.00								4.00	K9 - K9 (Canine)
10.00				10.00	10.00	10.00	10.00	80.00	REG - Regular Time

- To add additional information to the reported time, select an employee's reported time and then select the **Add Comments** icon.

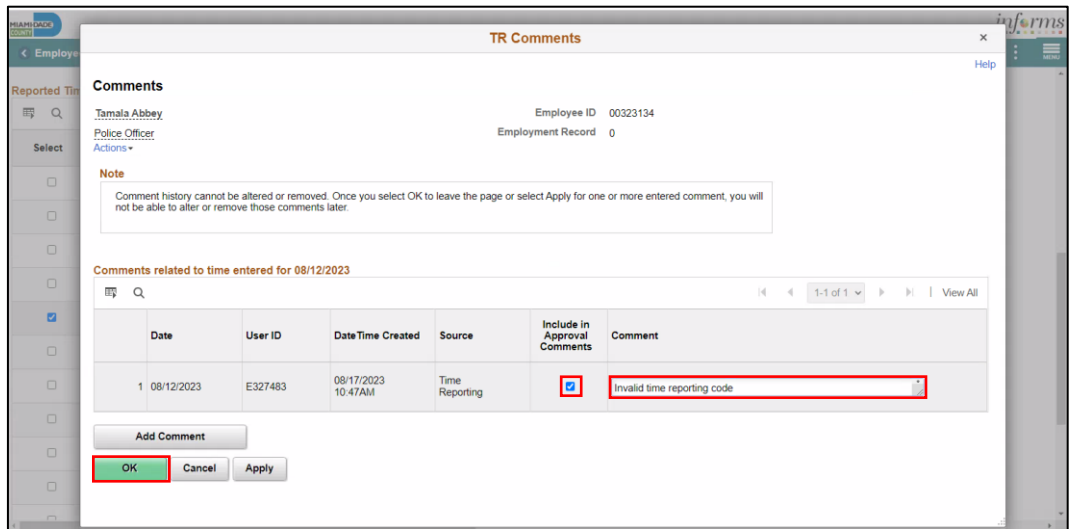
Reported Time Status

Select	Date	Reported Status	Total	TRC	Description	Add Comments
<input type="checkbox"/>	08/10/2023	Needs Approval	1.00	K9	K9 (Canine)	
<input type="checkbox"/>	08/10/2023	Needs Approval	10.00	REG	Regular Time	
<input type="checkbox"/>	08/11/2023	Needs Approval	1.00	K9	K9 (Canine)	
<input type="checkbox"/>	08/11/2023	Needs Approval	10.00	REG	Regular Time	
<input checked="" type="checkbox"/>	08/12/2023	Needs Approval	1.00	K9	K9 (Canine)	
<input type="checkbox"/>	08/12/2023	Needs Approval	10.00	REG	Regular Time	
<input type="checkbox"/>	08/13/2023	Needs Approval	1.00	K9	K9 (Canine)	
<input type="checkbox"/>	08/13/2023	Needs Approval	10.00	REG	Regular Time	
<input type="checkbox"/>	08/17/2023	Needs Approval	10.00	REG	Regular Time	
<input type="checkbox"/>	08/18/2023	Needs Approval	10.00	REG	Regular Time	

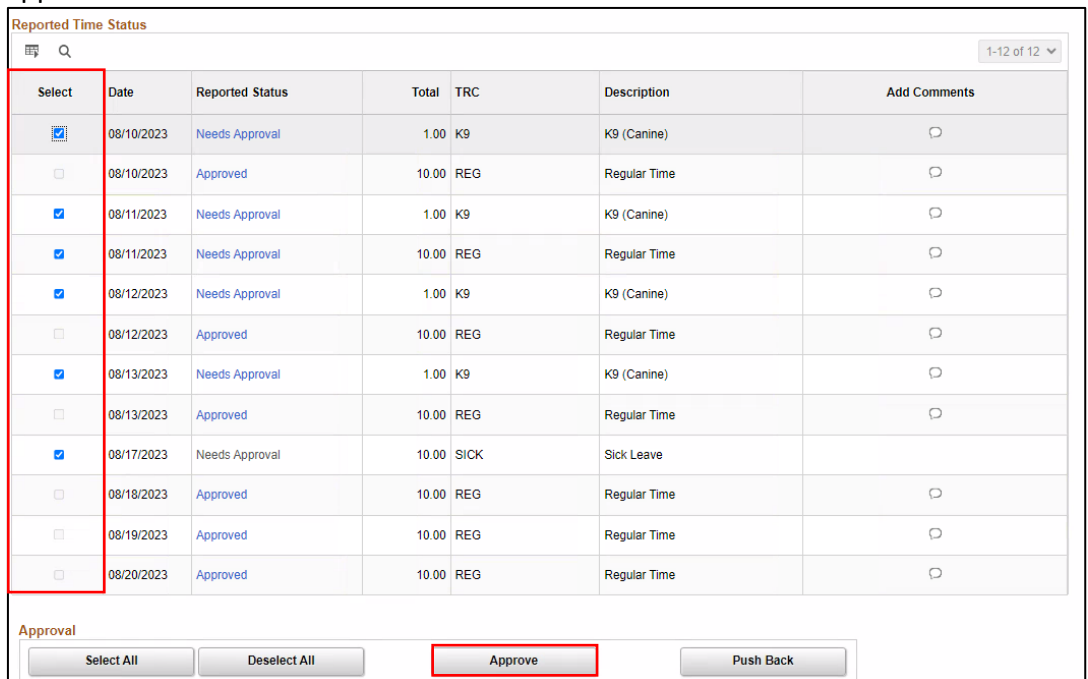
Lesson 2: Approve Time

Lecture 1:
Approve Time

6. Provide a **Comment** then select **Include in Approval Comments** checkbox and select **OK**.



7. Select a time or any valid time and then select **Approve**.
Note: Select All can be used to select all entered time and then select **Approve** to approve all selected time.



Lesson 2: Approve Time

Lecture 1:
Approve Time

a. Select **Yes** to confirm approval.

Are you sure you want to approve the time selected? (13504,2500)

Once Approved the status cannot be reverted back.

Select Yes to confirm and complete the status change, No to return to the page without updating the status.

b. Select **OK**.

< Approve Reported Time
Reported Time

Timesheet

Approve Confirmation

Selected transactions were successfully approved.

8. If the reported time is incorrect, select an employee's submitted reported time and then select the **Add Comments** icon.

Reported Time Status						
Select	Date	Reported Status	Total	TRC	Description	Add Comments
<input type="checkbox"/>	08/10/2023	Needs Approval	1.00	K9	K9 (Canine)	<input style="border: 2px solid red;" type="button" value="Add Comments"/>
<input type="checkbox"/>	08/10/2023	Approved	10.00	REG	Regular Time	<input type="button" value="Add Comments"/>

9. Provide a **Comment** for pushing back the time, select **Include in Approval Comments** and then select **OK**.

Comments related to time entered for 04/28/2022

	Date	User ID	DateTime Created	Source	Include in Approval Comments	Comment
1	04/28/2022	DPRTRN01	04/30/2022 8:17AM	Time Reporting	<input checked="" type="checkbox"/>	Incorrect time reporting code.

Lesson 2: Approve Time

Lecture 1:
Approve Time

10. Select **Push Back**.

Reported Time Status						
Select	Date	Reported Status	Total	TRC	Description	Add Comments
<input checked="" type="checkbox"/>	08/10/2023	Needs Approval	1.00	K9	K9 (Canine)	<input type="text"/>
<input type="checkbox"/>	08/10/2023	Approved	10.00	REG	Regular Time	<input type="text"/>
<input checked="" type="checkbox"/>	08/11/2023	Needs Approval	1.00	K9	K9 (Canine)	<input type="text"/>
<input checked="" type="checkbox"/>	08/11/2023	Needs Approval	10.00	REG	Regular Time	<input type="text"/>
<input checked="" type="checkbox"/>	08/12/2023	Needs Approval	1.00	K9	K9 (Canine)	<input type="text"/>
<input type="checkbox"/>	08/12/2023	Approved	10.00	REG	Regular Time	<input type="text"/>
<input checked="" type="checkbox"/>	08/13/2023	Needs Approval	1.00	K9	K9 (Canine)	<input type="text"/>
<input type="checkbox"/>	08/13/2023	Approved	10.00	REG	Regular Time	<input type="text"/>
<input checked="" type="checkbox"/>	08/17/2023	Needs Approval	10.00	SICK	Sick Leave	<input type="text"/>
<input type="checkbox"/>	08/18/2023	Approved	10.00	REG	Regular Time	<input type="text"/>
<input type="checkbox"/>	08/19/2023	Approved	10.00	REG	Regular Time	<input type="text"/>
<input type="checkbox"/>	08/20/2023	Approved	10.00	REG	Regular Time	<input type="text"/>

Approval

a. Select **Yes** to confirm Push Back.

Are you sure you want to push back the time selected to the originator? (13504,10158)

Select Yes to confirm and complete the transaction, No to return to the page without updating the status.

b. Select **OK**.

< Approve Reported Time
Reported Time

Timesheet

PushBack confirmation

Selected transactions were successfully pushed back.

Lesson 2: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario A Manager is out of the office and unable to approve their employee's timesheets. As the Department Personnel Representative (DPR), you have access to all the Manager's employees.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 2: Training Exercise

Debrief



1. Reported time requires approval.
 - a) True
 - b) False

2. Payable time requires approval.
 - a) True
 - b) False

Lesson 2: Lesson Summary

Lesson Summary



Now that you have completed the Approve Time lesson, you should be able to:

- Approve an employee's time on behalf of a Manager
- Learn the difference between Payable Time and Reported Time

Lesson 3: Approve Absence

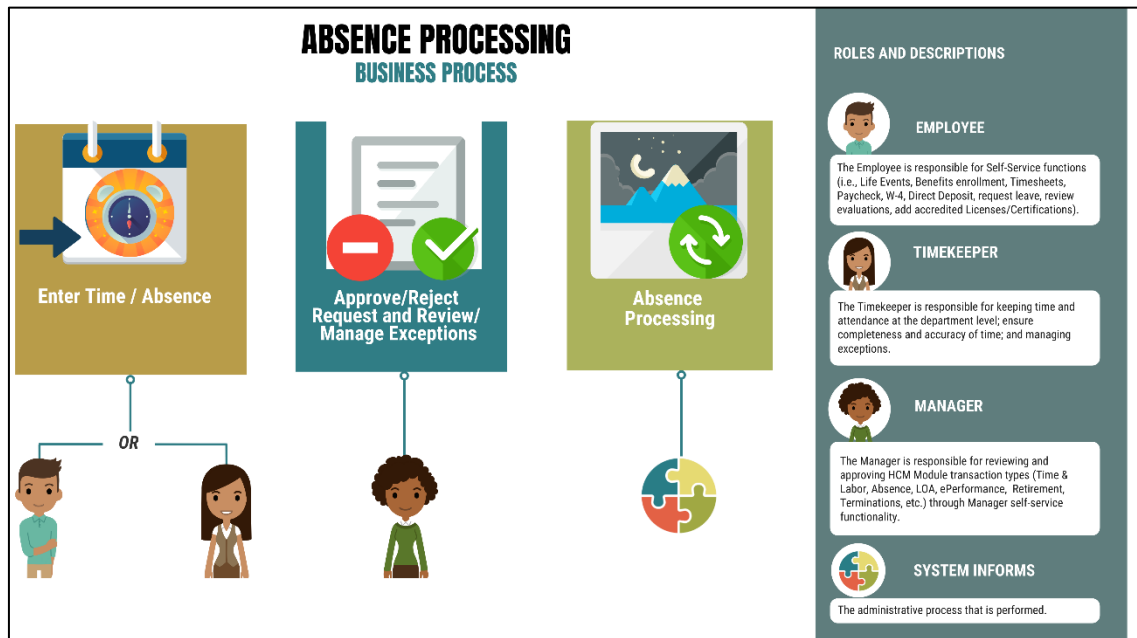
Lesson 3: Overview

At the conclusion of this lesson, you will be able to:

Understand how absence balances displayed on the employee's absence balance pages are from prior closed pay periods and do not include accruals earned or hours taken after pay period.

Lesson 3: Approve Absence

Lesson 3: Introduction



Lesson 3: Approve Absence

Key Terms



The following key terms are used in this module:

Term	Definition
Absence Accrual	Periodic calculation of actual entitlement earned.
Absence Balance	Leave balance available for the employee to use.
Absence Entitlement	Leave Types that have associated balances to decrement when used, could have an accrual that adds to balance as earned. i.e. Sick, Annual.
Absence Request	Method of entering leave includes an Absence Type and Date(s).
Absence Take	Type of leave requested, linked to one or multiple TRC(s) (Time Reporting Code) in T&L (if cascading).
Eligibility Group	Determines which leave entitlements an employee is eligible for, assigned on the Payroll Tab of Job data, also determines the accrual rates for entitlements.
Forecasting / Check Eligibility	Validation of sufficient balance and other additional criteria for an Absence Request.
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.

Lesson 3: Approve Absence

Lecture 1: View Absence Balance

INFORMS is configured with Miami-Dade County's policy on leave types. For example, a full-time employee is entitled to convert a maximum set number of sick to annual hours at the end of their leave year. Department Personnel Representative (DPR)s can view leave balances and absence requests of an employee in the Absence Balances section of Team Time tile.

DPR's may need to review an employee's current absence/leave balances before assisting Managers in approving absence. Leave balances are available to view whether your department enters transactions directly in INFORMS or uploads through the interface. However, where the absence/leave balances can be found in INFORMS depends on the type of absence/leave.

Viewing Absence Balance

Absence Balances displays the year-to-date absence balances for each absence type. These balances are from the most recent closed pay period and do not reflect accruals earned or hours taken after the pay period end date.

As a DPR, the availability to view employee's absence request can be done through the Timesheet or through the Payroll and Absence Management.

To review an employee's absence request through their time sheet, take the navigation below:

1. NavBar Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**
2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.

Lesson 3: Approve Absence

Viewing Absence Balance continued

Lecture 1: View Absence Balance

3. Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Wuldo Brann, Totals From 08/14/2023 - 08/20/2023

Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted
Abbey	Tamala	00323134	Police Officer	30.00	0.00	40.00			30.00
Abel	Ludie	00401864	Mdpd Victim Advocate	0.00	0.00	40.00			0.00
Abell	Keiondre	00033093	Police Officer	0.00	0.00	40.00			0.00

4. Select the **Absence** tab to review the **Absence Entitlement Balances**

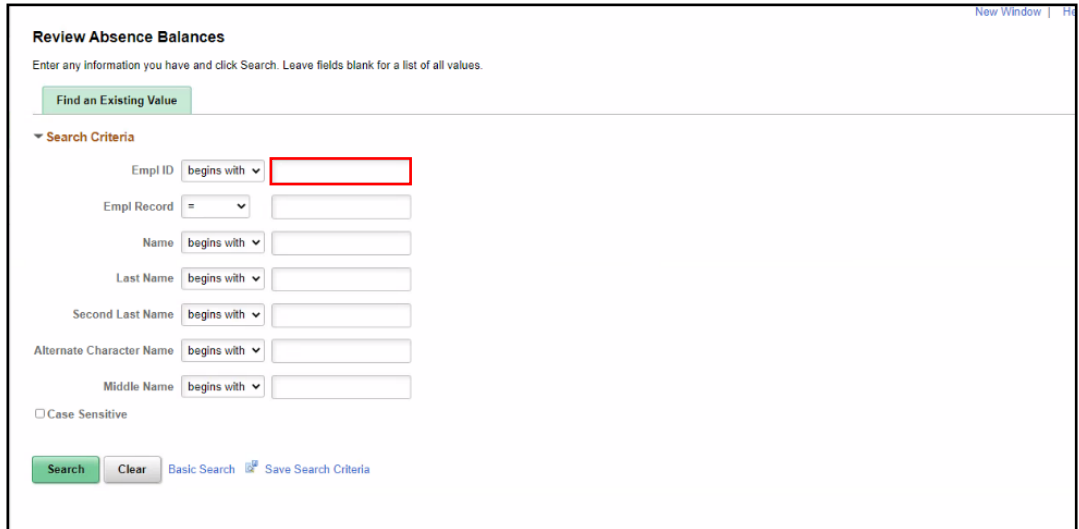
Entitlement Name	Balance as of 06/11/2023**	From	To	Accrual Period
Birthday Holiday Balance	1.00 Days	01/01/1901		Custom Period
Floating Holiday Balance	3.00 Days	10/01/2022	09/30/2023	Year to Date
Sick Leave Balance	210.00 Hours	01/01/1901		Custom Period
Compensatory Leave Balance	2.25 Hours	01/01/1901		Custom Period
Holiday Earned Leave Balance	86.00 Hours	01/01/1901		Custom Period
Annual Leave Balance	258.00 Hours	01/01/1901		Custom Period

Lesson 3: Approve Absence

Lecture 1: View Absence Balance

To review the employee's absence balances through Payroll and Absence Management, take the steps below:

1. NavBar Navigation: **Human Capital Management (HCM) > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances.**



Review Absence Balances

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Enter **Search Criteria** information for the applicable employee. It is recommended to use the Employee ID as it is a unique identifier for each employee.
3. Select the **Search** button.

If more than one employee displays in the search results based on your search criteria, select the applicable employee by selecting the corresponding **Empl ID** link.

Lesson 3: Approve Absence

Lecture 1: View Absence Balance

After an employee is selected from the list, the **Review Absence Balances** page contains three tabs:

- **Current Balance**
- **Forecast Balance**
- **Forecast Messages**

The default tab is **Current Balance**. This tab displays the year-to-date absence balances for each absence type. These balances are from the most recent closed pay period and do not reflect accruals earned hours taken after the pay period end date.

Employee ID 00194704
Empl Record 0
Name Simone Abecassis

Current Balance
Forecast Balance
Forecast Messages

Absence Entitlement Current Balance

🔍
1-9 of 9
View All

Accumulator Balance
User Keys

Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Custom Period	MD_ANNUAL	MD_ANNUAL_BAL	125.250000	01/01/1901	
Custom Period	MD_HOL	MD_HOL_BAL	0.000000	01/01/1901	
Custom Period	MD_COMP	MD_COMP_BAL	0.000000	01/01/1901	
Custom Period	MD_SICK	MD_SICK_BAL	167.500000	01/01/1901	
Year to Date	MD_FLOAT	MD_FLOAT_BAL	0.000000	10/01/2020	09/30/2021
Custom Period	MD_BDAY	MD_BDAY_BAL	0.000000	01/01/1901	
Custom Period	MD_ERSCK	MD_ERSCK_BAL	0.000000	01/01/1901	
Custom Period	MD_LVEPL	MD_LVEPL_BAL	0.000000	01/01/1901	
Year to Date	MD_FMLA	MD_FMLA_BAL	480.000000	01/01/2021	12/31/2021

Return to Search
Notify
Refresh

Current Balance
Forecast Balance
Forecast Messages

Lesson 3: Approve Absence

Lecture 1: View Absence Balance

The **Forecast Balance** tab allows you to forecast a specific absence type for the employee as of a past or future date. Follow the steps below to review the forecast for a specific absence type:

1. In the **Absence Take Element** field, select the type of absence being forecasted using the **Look Up** icon.
2. In the **As Of Date** field, enter the date for which you want to forecast the balance
3. Select the **Forecast** button.
4. Review the leave balance, in hours, for the leave type and date selected.

The screenshot shows the 'Forecast Balance' tab selected. At the top, there are three tabs: 'Current Balance', 'Forecast Balance' (highlighted with a red box), and 'Forecast Messages'. Below the tabs, the user information is displayed: Employee ID 00010645, Empl Record 0, and Name Kiwani Desjardins. There are two input fields: 'Absence Take Element' with a search icon and 'As Of Date' with a calendar icon. A 'Forecast' button is located to the right of the 'As Of Date' field. Below this is the 'Forecast Balance Results Detail' section, which includes a search bar, a dropdown menu showing '1-1 of 1', and a 'View All' link. There are three sub-tabs: 'Forecast Results' (highlighted), 'Accumulator Results', and 'User Keys'. Below the sub-tabs is a table with the following columns: Secondary Element, Forecast Element, Type, Numeric Value, Character Value, and Date Value. The table contains one row with a numeric value of 0.000000. At the bottom of the table are buttons for 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. At the very bottom, there are navigation links: 'Current Balance | Forecast Balance | Forecast Messages'.

The **Forecast Messages** tab allows you to review the messages that are generated during the forecasting process.

The screenshot shows the 'Forecast Messages' tab selected. At the top, there are three tabs: 'Current Balance', 'Forecast Balance', and 'Forecast Messages' (highlighted with a red box). Below the tabs, the user information is displayed: Employee ID 00010645, Empl Record 0, and Name Kiwani Desjardins. Below this is the 'Forecast Messages' section, which includes a search bar, a dropdown menu showing '1-1 of 1', and a 'View All' link. There are three sub-tabs: 'Calculation Status', 'Message Text', 'Message Set Number', and 'Number'. Below the sub-tabs is a table with the following columns: Calculation Status, Message Text, Message Set Number, and Number. The table contains one row with a 'Details' link in the last column. At the bottom of the table are buttons for 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. At the very bottom, there are navigation links: 'Current Balance | Forecast Balance | Forecast Messages'.

Lesson 3: Approve Absence

Lecture 2: Approve Absence Request

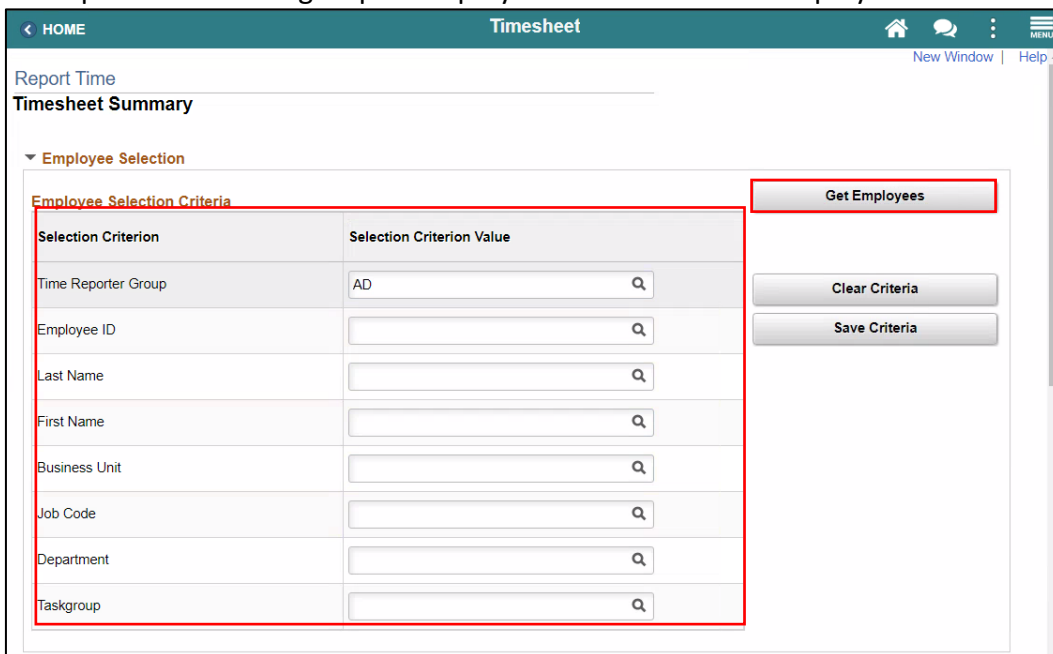
Approve Absence Request

The Department Personnel Representative (DPR) can review the absence request through the employee’s timesheet.

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 3: Approve Absence

Lecture 2:
Approve
Absence

3. Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Wulido Brann, Totals From 08/28/2023 - 09/03/2023										
Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
Abbey	Tamala	00323134	Police Officer	0.00	0.00	40.00			0.00	0
Abel	Ludie	00401864	Mdpd Victim Advocate	0.00	0.00	40.00			0.00	0

In the **Absence** tab, the **Absence Take** and **Forecast Results** are available for viewing.

The **Absence Take** includes **Start Date, End Date, Absence Name, Duration, Unit Type, Details, Status, Approval Monitor, Source, Cancel, Forecast, Edit**.

Reported Time Status | Summary | **Absence** | Exceptions | Payable Time

Absence Events

Absence Take | Forecast Results

Select	*Start Date	End Date	Absence Name	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
<input type="checkbox"/>	08/31/2023	09/02/2023	Sick Leave	30.00	Hours	Details	Needs Approval	Approval Monitor	Employee Timesheet	<input type="checkbox"/>	Forecast	Edit

Add Absence Event

Approval

Select All | Deselect All | Approve | Push Back

Absence Entitlement Balances

Entitlement Name	Balance as of 06/11/2023**	From	To	Accrual Period
Birthday Holiday Balance	1.00 Days	01/01/1901		Custom Period
Floating Holiday Balance	3.00 Days	10/01/2022	09/30/2023	Year to Date
Sick Leave Balance	210.00 Hours	01/01/1901		Custom Period
Compensatory Leave Balance	2.25 Hours	01/01/1901		Custom Period

The **Forecast Results** includes **Start Date, End Date, Absence Name, Forecast Value, Forecast Date Time, Forecast Details**.

Reported Time Status | Summary | **Absence** | Exceptions | Payable Time

Absence Events

Absence Take | **Forecast Results**

Select	*Start Date	End Date	Absence Name	Forecast Value	Forecast DateTime	Forecast Details
<input type="checkbox"/>	08/31/2023	09/02/2023	Sick Leave	ELIGIBLE	08/30/2023 10:35AM	Forecast Details

Add Absence Event

Lesson 3: Approve Absence

Lecture 2: Approve Absence

- If no additional changes are needed, select **Approve**.

The screenshot shows the 'Absence' tab with a table of absence events. The 'Approve' button in the 'Approval' section is highlighted with a red box.

Select	*Start Date	End Date	Absence Name	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
<input type="checkbox"/>	08/31/2023	09/02/2023	Sick Leave	30.00	Hours	Details	Needs Approval	Approval Monitor	Employee Timesheet	<input type="checkbox"/>	Forecast	Edit

Approval buttons: [Select All](#), [Deselect All](#), **Approve**, [Push Back](#)

Note: A window will display confirming if you want to Approve this request.

- If an Absence Request requires additional information (i.e., Attachments, Notes etc.) a request can be **Push Back** to send back to the employee.

The screenshot shows the 'Absence' tab with a table of absence events. The 'Push Back' button in the 'Approval' section is highlighted with a red box.

Select	*Start Date	End Date	Absence Name	Duration	Unit Type	Details	Status	Approval Monitor	Source	Cancel	Forecast	Edit
<input type="checkbox"/>	08/31/2023	09/02/2023	Sick Leave	30.00	Hours	Details	Needs Approval	Approval Monitor	Employee Timesheet	<input type="checkbox"/>	Forecast	Edit

Approval buttons: [Select All](#), [Deselect All](#), [Approve](#), **Push Back**

Note: A window will display confirming if you want to Push Back this request.

Lesson 3: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario The Manager in your department is out of office. They have reached out to their DPR and requested that they approve an absence request on their behalf. As a DPR, using Manager Self Service, approve an Absence Request for your manager.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 3: Training Exercise

Debrief



1. What are the Department Personnel Representatives (DPR) options for Absence approval?
 - a) Approve
 - b) Pushback
 - c) All of the Above

2. In the Absence Balance page of an employee, which tabs are available to a DPR?
 - a) Current Balance
 - b) Forecast Balance
 - c) Forecast Messages
 - d) All of the Above

Lesson 3: Approve Absence

Lesson Summary



Now that you have completed the lesson, you should be able to:

- Understand how absence balances displayed on the employee's absence balance pages are from prior closed pay periods and do not include accruals earned or hours taken after pay period

Lesson 4: Manage Exceptions

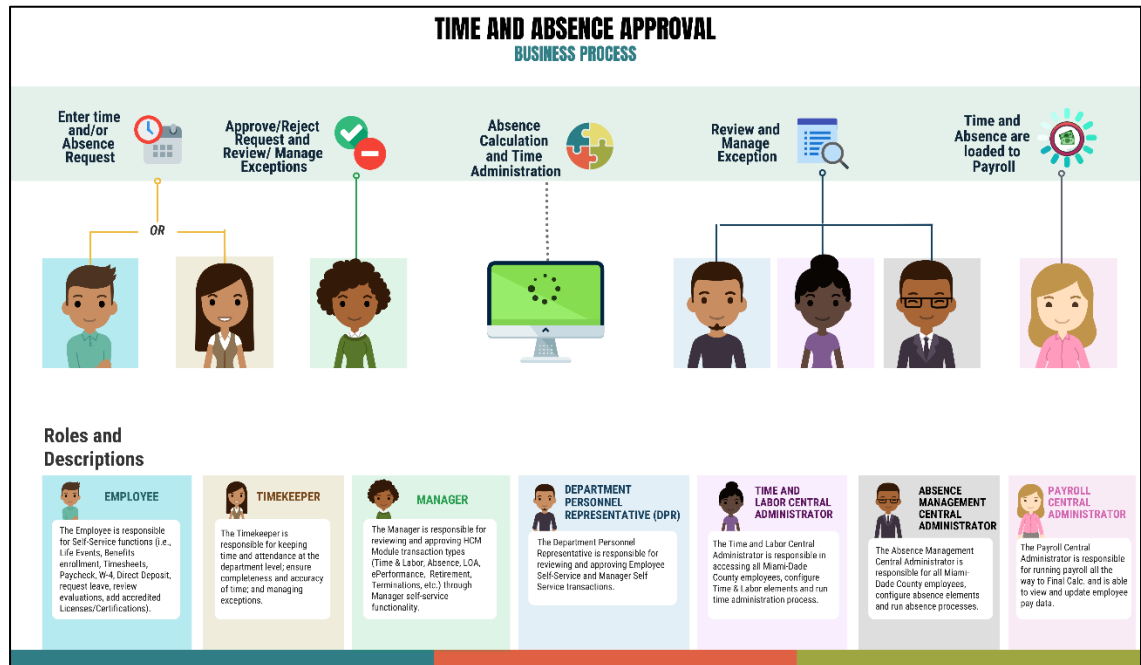
Lesson 4: Overview

At the conclusion of this lesson, you will be able to:

- Understand the difference between high, medium and low severity exceptions
- View and resolve time reporting exceptions

Lesson 4: Manage Exceptions

Lesson 4: Introduction



Lesson 4: Manage Exceptions

Key Terms



The following key terms are used in this module:

Term	Definition
Exceptions	Any time reported that are not in compliance with the Pay Plan or CBA (Collective Bargaining Agreements) rules.
High Exception	Exceptions with a <i>High</i> severity level must be resolved in order for the reported time associated with the exception to become payable time. Data must be changed in the timesheet and re-submitted. Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved..
Medium Exception	Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Low Exception	Low severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Payable Time	Time loaded into payroll.

Lesson 4: Manage Exceptions

Lecture 1: Manage Time Exceptions

Exceptions are user- and system-generated warnings and errors that indicate a problem with an employee's reported time or a problem in the system.

The following topics will be reviewed in this lesson:

- Overview of Exceptions
- Review Exceptions

Overview of Exceptions

Exceptions are generated when the reported time has been approved and the Time Administration process has been run. Any reported time that violates system rules will generate an Exception.

If there is an exception on an employee's time, an icon will appear for each day on the tile after the Time Administration process is run.

Exceptions have severity levels:

- *High*: Exceptions with a High severity level must be resolved in order for the reported time associated with the exception to become payable time. Data must be changed in the timesheet and re-submitted.
- *Medium*: Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved..
- *Low*: Low severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.

In addition to exception severity levels, there are also exception statuses. The three exception statuses that are available when reviewing exceptions are: *Unresolved and Resolved*.

Lesson 4: Manage Exceptions

Lecture 1: Manage Time Exceptions

The following are examples of different types of exceptions in INFORMS:

Exception ID	Description	Severity
MD_OFFDY	TRC cannot be posted on Off Day.	High
TLX00440	TRC is not in TRC Program.	High
MDTL004	NGTO exceed OVT.	High
MDHOLPTM	HOLEA/HOLPD required.	Medium
MDNGTEX4	NGT hours report less than minimum required.	Low
MDOCL007	OCL hours may not be reported with Leave hours.	Low
MDVALEX2	Less than 80/96 hours reported for the pay period.	Low

Lesson 4: Manage Exceptions

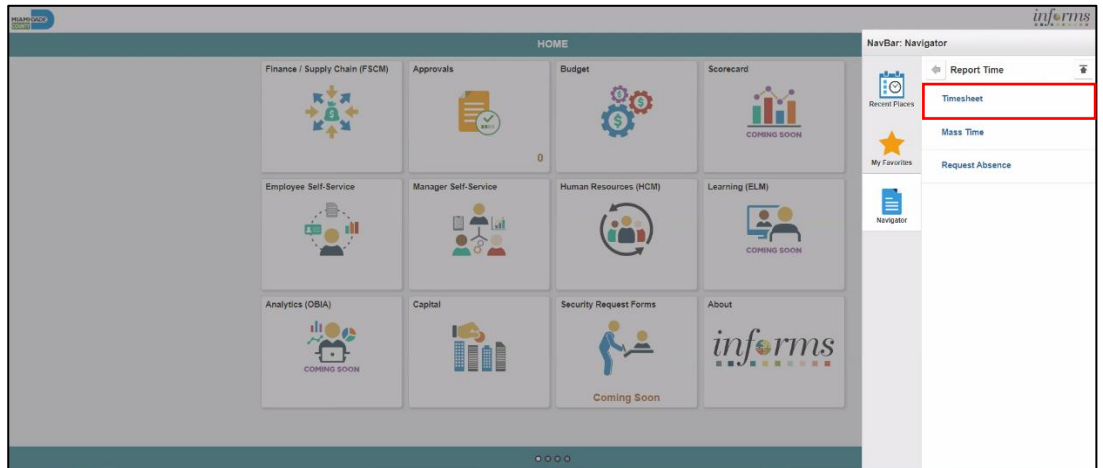
Lecture 1: Manage Time Exceptions

Manage Time Exceptions

A Department Personnel Representative (DPR) has the option to resolve low and medium severity exceptions on the Exception Table. To resolve an exception, the user will determine if the error exists with the reported time, or if there is an invalid value in a setup table. If the error is due to reported time, the DPR will need to correct the time on the Timesheet and process the time again through the Time Administration process.

To resolve an exception, the DPR must go to the employee’s timesheet. The following steps outline how to view, and resolve an exception:

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.

< Approve Reported Time
Reported Time

Approve Reported Time

Timesheet Summary

▼ Employee Selection

Employee Selection Criteria	Selection Criterion Value
Time Reporter Group	AD <input type="text" value="AD"/>
Employee ID	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Job Code	<input type="text"/>
Department	<input type="text"/>
Taskgroup	<input type="text"/>

Get Employees

Clear Criteria

Save Criteria

Lesson 4: Manage Exceptions

Lecture 1:
Manage
Exceptions

3. Select an employee's **Last Name** to display the details of the submitted reported time.

Employees For Kiwani Desjardins, Time Needing Approval From 04/25/2022 - 05/01/2022									
Time Summary		Demographics							
Select	Last Name	First Name	Employee ID	Job Title	Hours to be Approved	Reported Hours	Scheduled Hours	Exception	Absence to Approved
<input type="checkbox"/>	Bissell	Maximilian	00400870	Social Media Specialist	32.00	40.00	56.00		

4. Review the exception details before resolving the exception.
 - a. **Explanation:** The explanation of the exception.
 - b. **Exception Severity:** Displays the severity of the exception: High, Medium and Low. As a reminder, Miami-Dade County INFORMS does not create payable time for reported time that has an exception severity of *High*.

Reported Time Status	Summary	Absence	Exceptions	Payable Time		
Exceptions 1-4 of 4						
Date	Exception ID	Exception Source	Status	Exception Severity	Explanation	Comment
05/02/2022	TLX00830	Timesheet	Unresolved	High	The Time Reporter's Department ID is invalid with the reported Taskgroup: 00103000	

Although INFORMS will trigger a Low and Medium severity, the DPR can submit time on behalf of the manager. However, for High severity, based on the severity explanation, DPRs are required to update the time sheet prior to submitting for approval.

It is strongly encouraged to review each individual exception before submitting.

Note: All *High* severity exceptions need to be fixed on the employee’s timesheet by the employee, Manager, or Department Personnel Representative (DPR)) and resubmitted through the Time Administration process.

Once the exceptions have been resolved the process of managing exceptions has been completed.

Lesson 4: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario An employee has brought to your attention that his reported time is not translating to payable time on his timesheet. As the Department Personnel Representative (DPR), you want to review the *High* severity exceptions that the employees can then go back and fix the errors on their timesheets.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 4: Training Exercise

Debrief



1. Provide an example of a *High* severity exception.

2. How are *High* severity exceptions fixed in INFORMS?

Lesson 4: Manage Exceptions

Lesson Summary



Now that you have completed the lesson, you should be able to:

- Understand the difference between high, medium and low severity exceptions
- View and resolve time reporting exceptions

Lesson 5: Manage Work Schedule

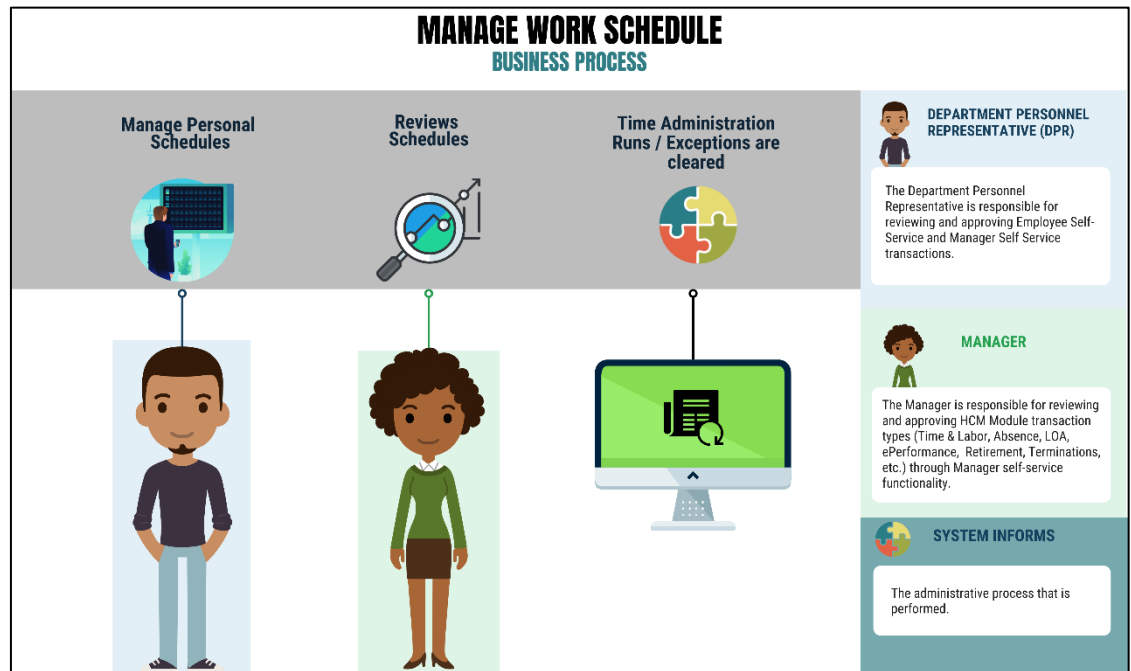
Lesson 5: Overview

At the conclusion of this lesson, you will be able to:

- Understand the Elapsed Schedule
- Assign a Personal Schedule
- Manage Schedules

Lesson 5: Manage Work Schedule

Lesson 5: Introduction



Lesson 5: Manage Work Schedule

Key Terms



The following key terms are used in this module:

Term	Definition
Elapsed Schedule	Schedules that show the duration of time that the employee worked. i.e. the employee worked eight hours on Monday, forty hours for the week.

Lesson 5: Manage Work Schedule

Lecture 1: Overview of Schedules

This lesson will review Manage Work Schedule.

The following topics will be discussed in this lesson:

- Overview of Schedules
- Assigning a Personal Schedule
- Managing Schedules
 - Overriding Employee Schedules

Overview of Schedules

Work schedules are being implemented to validate absences only and are not being used to track actual start and end times for an employee.

Elapsed Schedule is the only schedule that could be assigned to an employee:

- Elapsed Schedule: Elapsed schedules show the duration of time that the employee worked. For example, the employee worked eight hours on Monday, forty hours for the week.

Schedules are maintained to validate time and absence entries. These leave entries can be days of the week an employee has taken leave or the number of hours an employee is off for a specified day.

Note: The Miami Dade County is implementing both the INFORMS Time and Labor, and the INFORMS Absence Management modules. These two modules use many of the same pages and employee records assign and maintain schedules. Since these two modules are integrated, schedules only need to be created and assigned to an employee one time. The schedules that are set up will be available for review for both modules.

Lesson 5: Manage Work Schedule

Lecture 1: Overview of Schedules

Process Changes

The implementation of INFORMS schedules functionality differs vastly from the current county processes. The following are important changes to note that occur due to this implementation:

- In the legacy system, a user could use a default template to prepopulate a timesheet. In INFORMS, all time reporters must enter the hours worked based on the time reporting template assigned on the **Time Reporter Data** page.
- At the department level, only personal schedules are configured in INFORMS. These personal schedules will be configured to facilitate Absence reporting. In order to assign a personal schedule, a new schedule must be created.
- In the legacy system, employees were able to set up their own schedule to use during time reporting. In INFORMS, the DPR has the ability to create a personal schedule.

End-to-end Process

Below is the flow for assigning and maintaining schedules:

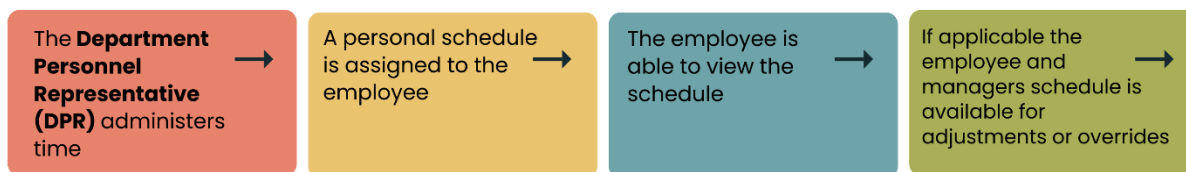


Figure 1: Schedules Flow

Schedules need to be assigned or changed for employees in the following scenarios:

- When an employee is hired and becomes active in INFORMS for the first time
- When an employee is rehired into INFORMS
- When an active employee has a change in the expected daily hours or workdays

In order for Absence to apply leave take rules accurately, an employee must be in the appropriate schedule.

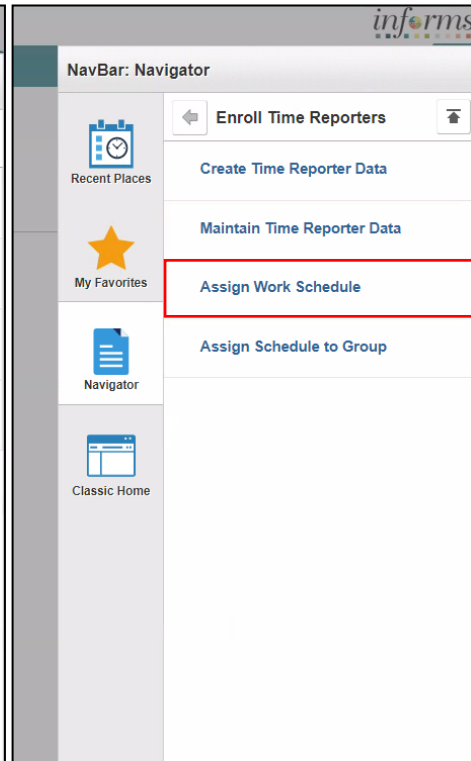
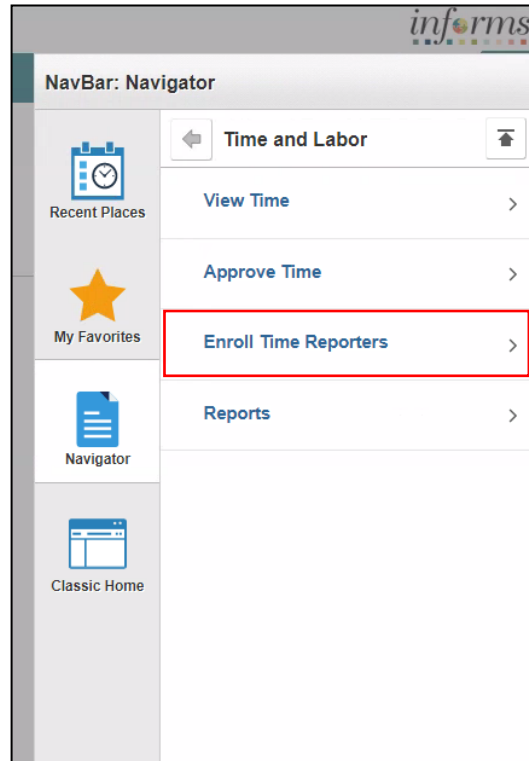
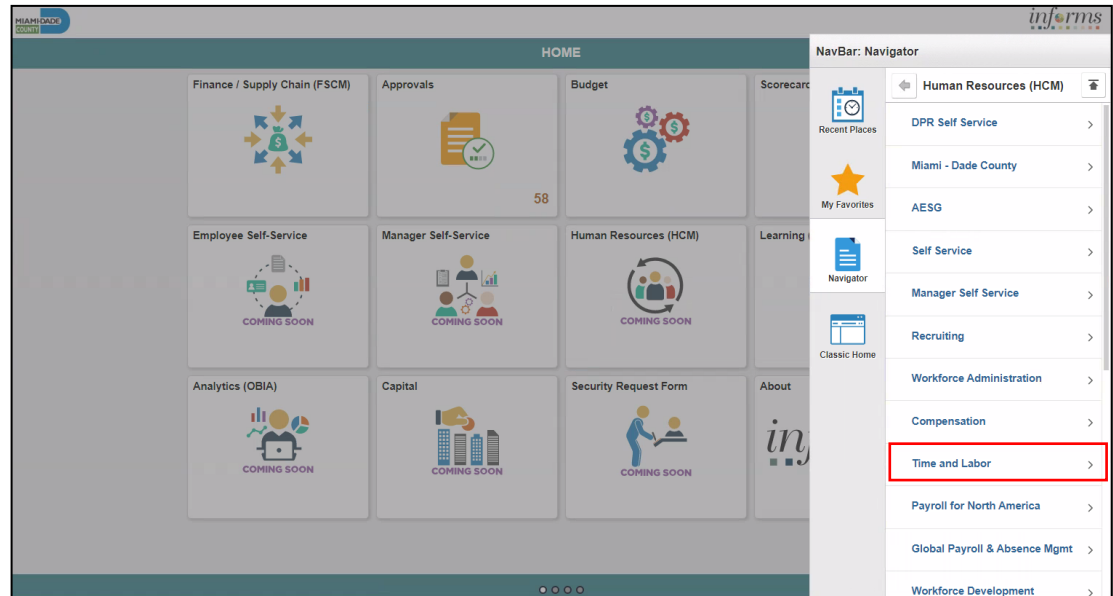
Lesson 5: Manage Work Schedule

Lecture 2: Personal Schedules

Assigning a Personal Schedule

In INFORMS, Default Schedules are configured at the county level. The following steps outline how to assign a personal schedule to an employee:

1. NavBar Navigation: **Human Resources (HCM) > Time and Labor > Enroll Time Reporters > Assign Work Schedule.**



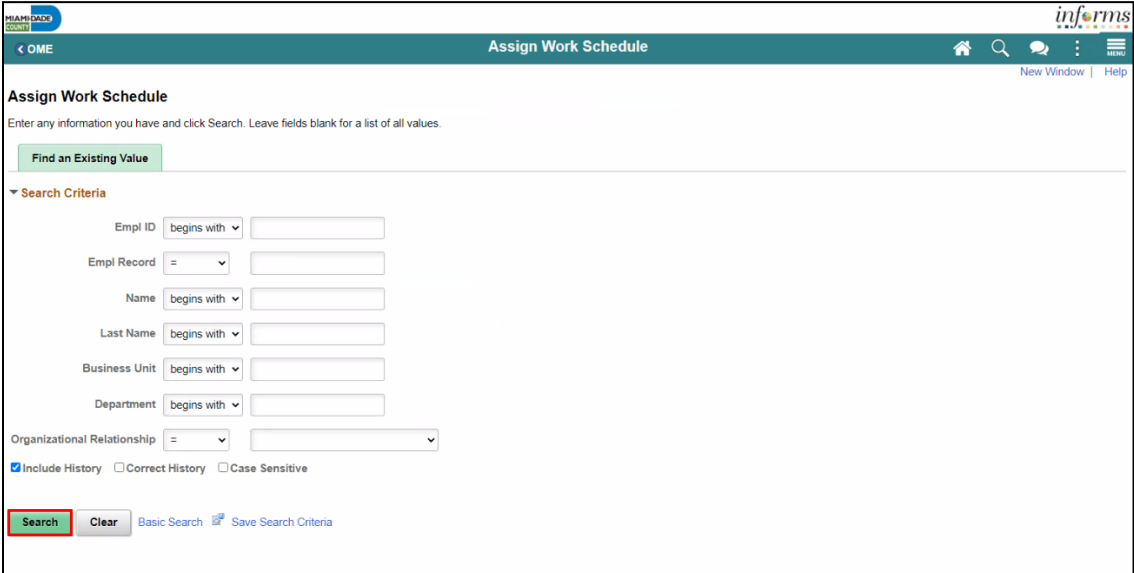
Lesson 5: Manage Work Schedule

Lecture 2: Personal Schedules

Assigning a Personal Schedule

2. On the **Assign Work Schedule** search page, enter any of the following search criteria:
 - **Empl ID**
 - **Empl Record**
 - **Name**
 - **Last Name**
 - **Business Unit**
 - **Department**
 - **Organizational Relationship**
3. When all search criteria are entered, Select **Search**.

Note: If more than one absence request displays in the search results based on your search criteria, select the applicable employee. If there is only one employee that meets the search criteria.



informatics

HOME BACK

OME Assign Work Schedule New Window | Help

Assign Work Schedule

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with []

Empl Record = []

Name begins with []

Last Name begins with []

Business Unit begins with []

Department begins with []

Organizational Relationship = []

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Lesson 5: Manage Work Schedule

Lecture 2:
Personal
Schedules

Assigning a Personal Schedule

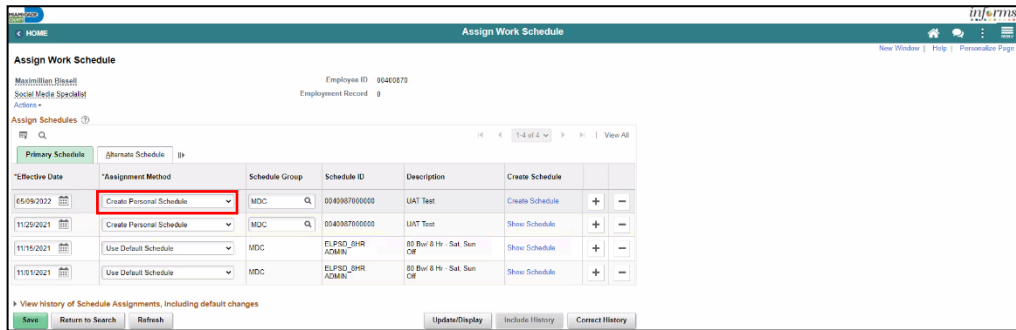
4. Review the **Search Results**.

Note: If there are more than 100 search results, the first 100 will be available. Select the **right arrow** or **Last** to review additional search results.

5. Find the correct employee and Select on the **Empl ID** to open the **Assign Work Schedule** page for that employee.

Empl ID	Empl Record	Name	Last Name	Business Unit	Department	Organizational Relationship
00000001	0	Hatty Hazard	HAZARD	HR	HR03030000	Emp
00000006	0	Kenneth Drucker	DRUCKER	HR	HR03000000	Emp

6. On the **Assign Work Schedule** page, change the **Assignment Method** from the *Use Default Schedule* option to *Select Personal Schedule* if there is no schedule previously assigned to the employee.

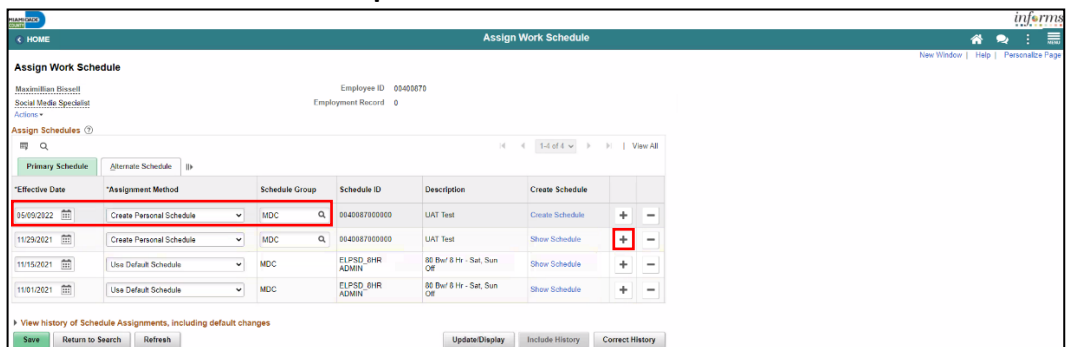


7. If there is a schedule assigned to the employee, select the **plus sign (+)** to add a new **Effective Date** and a new schedule assignment. After *Select Personal Schedule* is selected, it activates the **Schedule Group** and **Schedule ID** fields.

NOTE: Select the **plus sign (+)** on the top row

a. Enter the **Effective Date** of the assigned schedule. The effective date cannot be older than the prior assignment.

b. Enter the **Schedule Group**.



Lesson 5: Manage Work Schedule

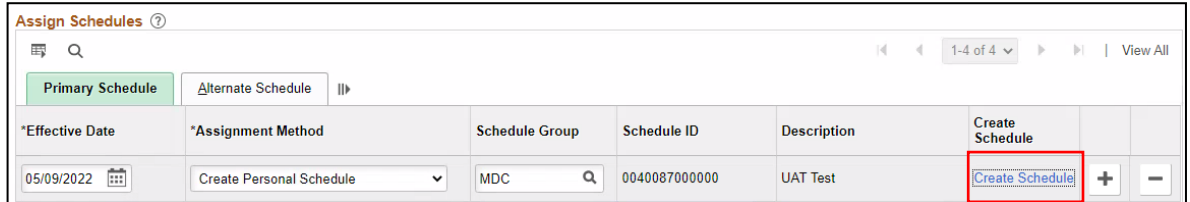
Lecture 2: Personal Schedules

Assigning a Personal Schedule

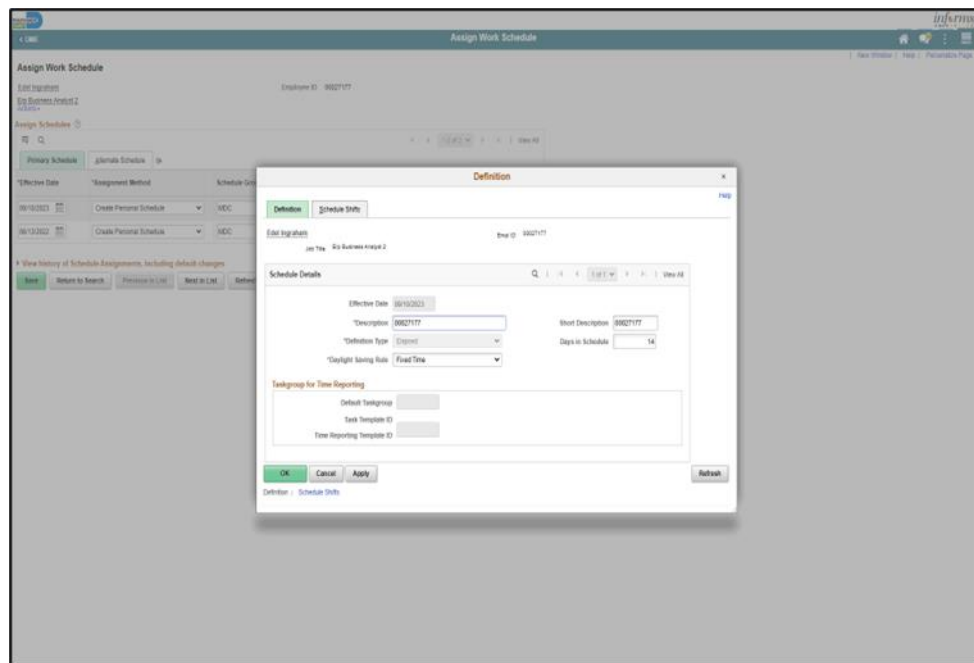
Once the fields are entered, the **Description** will update accordingly.

Note: If *Default Schedule* is selected for the **Assignment Method**, INFORMS will use the default schedule from the workgroup assigned to the employee’s Time Reporter Data. In the case there is no default schedule set up on the workgroup, INFORMS will use the default schedule from the Paygroup assigned to the employee’s job data.

8. Select **Create Schedule**.



9. Here, view and update the schedule details for the employee:



The following are required fields (*) that must be updated prior to selecting **OK**:

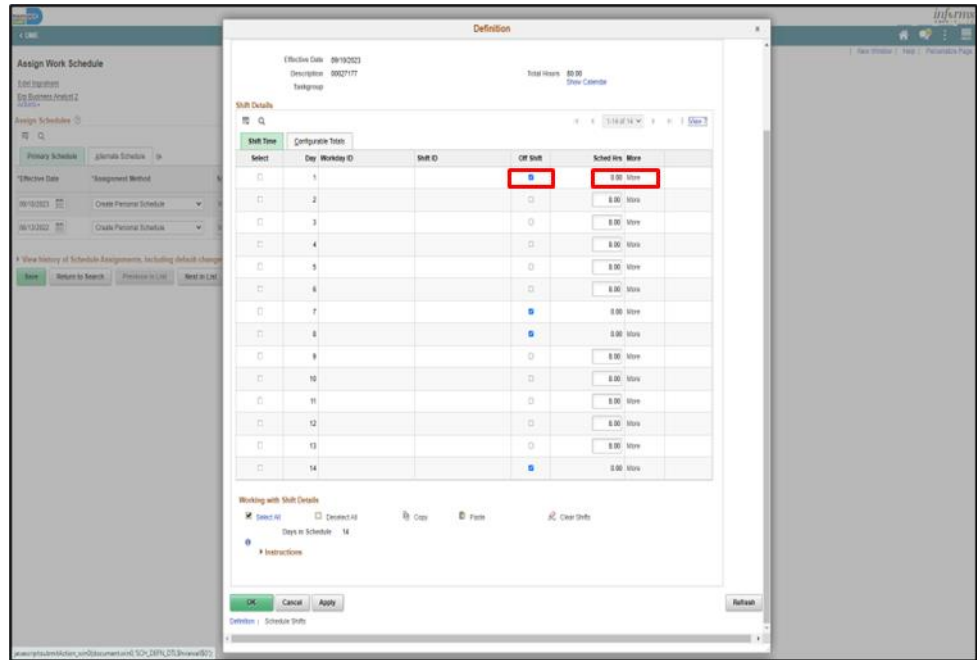
- Description
- Daylight Saving Rule
- Days in Schedule (14)

Lesson 5: Manage Work Schedule

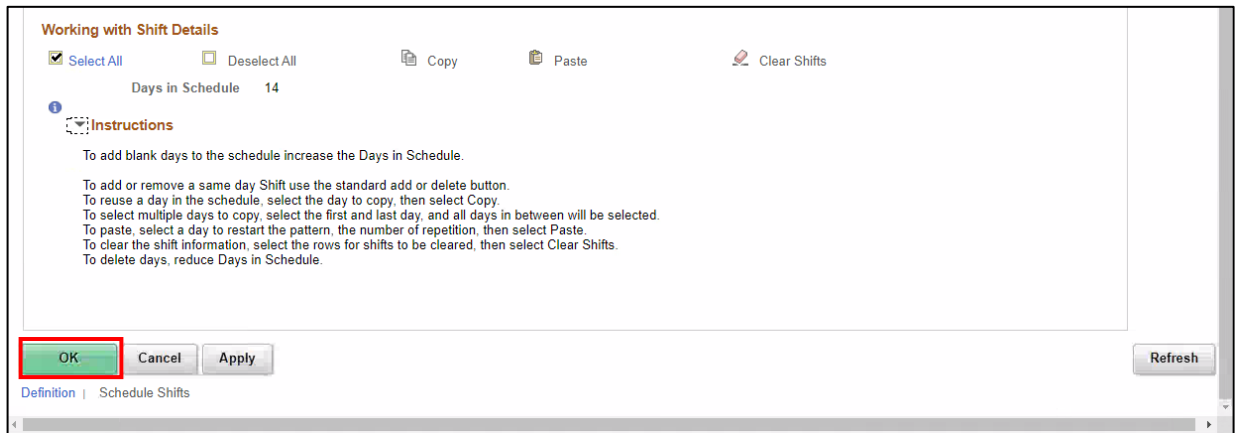
Lecture 2:
Personal
Schedules

Assigning a Personal Schedule

10. Select the **Schedule Shifts** Tab and enter the shift *Off Shift* and *Schedule Hrs.*



11. Additional instructions are provided at the bottom of this page. Select **OK**.



Lesson 5: Manage Work Schedule

Lecture 2:
Personal
Schedules

Assigning a Personal Schedule

12. On the **Assign Work Schedule** page, select the **grey arrow** next to **View history of Schedule Assignments, including default changes** to review the work schedule history.

Assign Schedules

Primary Schedule | Alternate Schedule

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule
05/10/2022	Create Personal Schedule	MDC	0040087000000	Test	Show Schedule
05/09/2022	Create Personal Schedule	MDC	0040087000000	UAT Test	Show Schedule
11/29/2021	Create Personal Schedule	MDC	0040087000000	UAT Test	Show Schedule
11/15/2021	Use Default Schedule	MDC	ELPSD_8HR ADMIN	80 Bw/ 8 Hr - Sat, Sun Off	Show Schedule
11/01/2021	Use Default Schedule	MDC	ELPSD_8HR ADMIN	80 Bw/ 8 Hr - Sat, Sun Off	Show Schedule

View history of Schedule Assignments, including default changes

Primary Assignment History | Alternate Assignment History

Effective Date	Assignment Method	Workgroup	Schedule Group	Schedule ID	Description
05/10/2022	Personal Schedule		MDC	0040087000000	Test
05/09/2022	Personal Schedule		MDC	0040087000000	UAT Test
11/29/2021	Personal Schedule		MDC	0040087000000	UAT Test
11/15/2021	Default from Workgroup	M-JB			
11/01/2021	Default from Workgroup	M-JB			

Buttons: Save, Return to Search, Refresh, Update/Display, Include History, Correct History

Under this section, review the employee’s work schedule history, like previous **Effective Date, Assignment Methods, Schedule Groups, Schedule IDs** and **Descriptions**.

13. When all information on the **Assign Work Schedule** page has been entered and reviewed, select **Save**. A Personal Schedule has now been assigned to an employee.

View history of Schedule Assignments, including default changes

Primary Assignment History | Alternate Assignment History

Effective Date	Assignment Method	Workgroup	Schedule Group	Schedule ID	Description
05/10/2022	Personal Schedule		MDC	0040087000000	Test
05/09/2022	Personal Schedule		MDC	0040087000000	UAT Test
11/29/2021	Personal Schedule		MDC	0040087000000	UAT Test
11/15/2021	Default from Workgroup	M-JB			
11/01/2021	Default from Workgroup	M-JB			

Buttons: Save, Return to Search, Refresh, Update/Display, Include History, Correct History

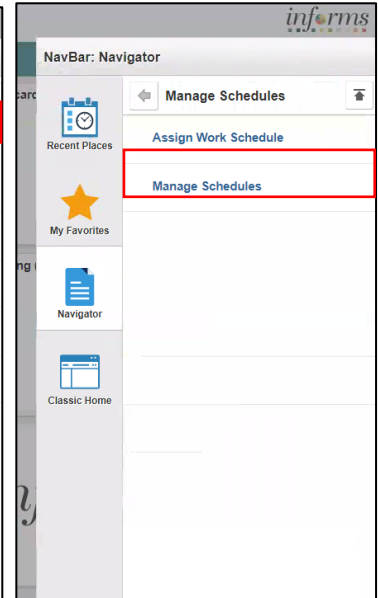
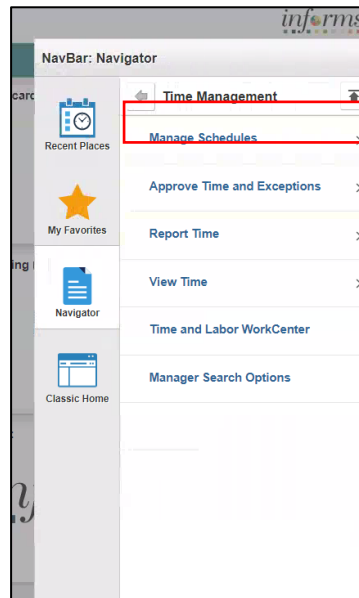
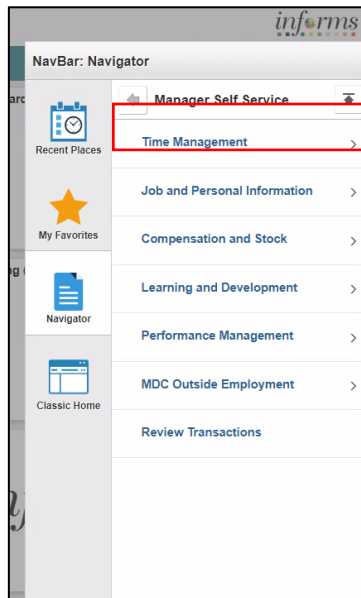
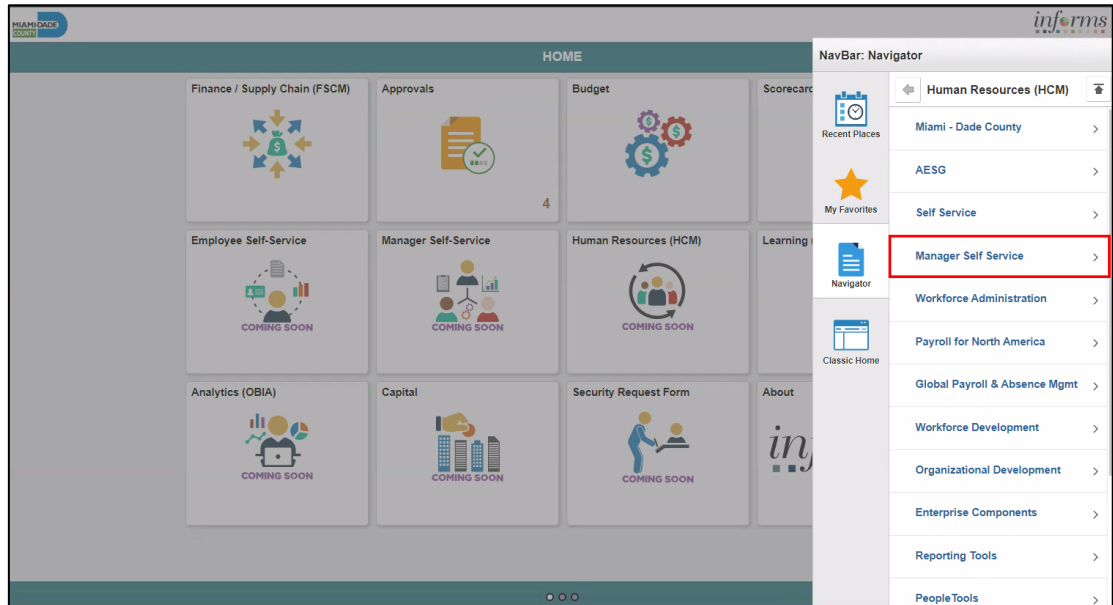
Lesson 5: Manage Work Schedule

Lecture 3: Managing Schedules

Managing Schedules

Overriding an Employee's Schedule for a Temporary Situation

1. NavBar Navigation: **Manager Self-Service > Time Management > Manage Schedules > Manage Schedules.**



Lesson 5: Manage Work Schedule

Lecture 3: Managing Schedules

2. On the **Weekly Schedules** search page, enter any of the following search criteria:
 - **Time Reporter Group**
 - **Employee ID**
 - **Last Name**
 - **First Name**
 - **Business Unit**
 - **Workgroup**
 - **Taskgroup**
 - **Position Number**

3. When all search criteria are entered, select **Search**.

Note: If more than one displays in the search results based on your search criteria, select the applicable employee. If there is only one employee that meets the search criteria.

4. Select the scheduled hours for the day the employee’s schedule must be overridden. This opens the **Schedule Detail** page.

Schedule Detail				Sunday 03/27/22	Monday 03/28/22	Tuesday 03/29/22	Wednesday 03/30/22	Thursday 03/31/22	Friday 04/01/22
<input checked="" type="checkbox"/>	Hunt	Don	00185051	0 Hours OFF	8 Hours	8 Hours	8 Hours	8 Hours	8 Hours

The Search Results may appear different depending on how the employee reports time. For elapsed employees, schedule hours appear. In addition to the elapsed information, events such as Approved Training, Absence and Holiday information appear in the grid as icons.

Legend							
Approved Training		Planned Absence		Holiday		Multiple Shifts	
Crossover Shift		Scheduled OFF Day		Replaced Employee		Shift has changing elements	

Lesson 5: Manage Work Schedule

Lecture 1: Managing Schedules

Managing Schedules

- To make a change to the employee's schedule for the day, the Department Personnel Representative (DPR) can add or change the **Shift ID**, or manually enter the new time.
- To clear the schedule, select a **Schedule Type** (if applicable) and enter a **Default Taskgroup**. Then Select **Refresh Schedule**.

Schedule Detail for 03/28/2022

Don Hunt Employee ID 00185051
 Actions Job Title Bcc Administrative Coor Employment Record Number 0

Instructions

Refresh Schedule

*Schedule Type **Elapsed** *Punch Pattern Default Default Taskgroup

Refresh Schedule (Existing schedule will be cleared and refreshed based on the selections made.)

Primary Schedule

Shift ID	Taskgroup	Off Shift	Sched Hrs
<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>	8.00 <input type="button" value="+"/> <input type="button" value="-"/>

Alternate Schedule
No schedule data for today

Training Details
No training data for today

Absence Details
No absence data for today

5. On the **Schedule Detail** page, review the Primary Schedule section.
6. Change the **Shift ID** to reflect the new schedule that is going to override what is currently there. Do not override the **taskgroup** for the employee.
7. When all applicable schedule information has been entered, Select **Save**. It is only after the schedules is saved that the information is overridden.

The steps to override an employee's schedules are now complete.

Lesson 5: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment

Scenario An employee's schedule is assigned to the wrong taskgroup. As the Department Personnel Representative (DPR), you need to override the taskgroup.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 5: Training Exercise

Debrief



1. What are the types of schedules that can be assigned to an employee?
 - a) Default Schedule
 - b) Personal Schedule
 - c) All of the Above
 - d) None of the Above

2. How does a default schedule differ from a personal schedule?

Lesson 5: Manage Work Schedule

Lesson Summary

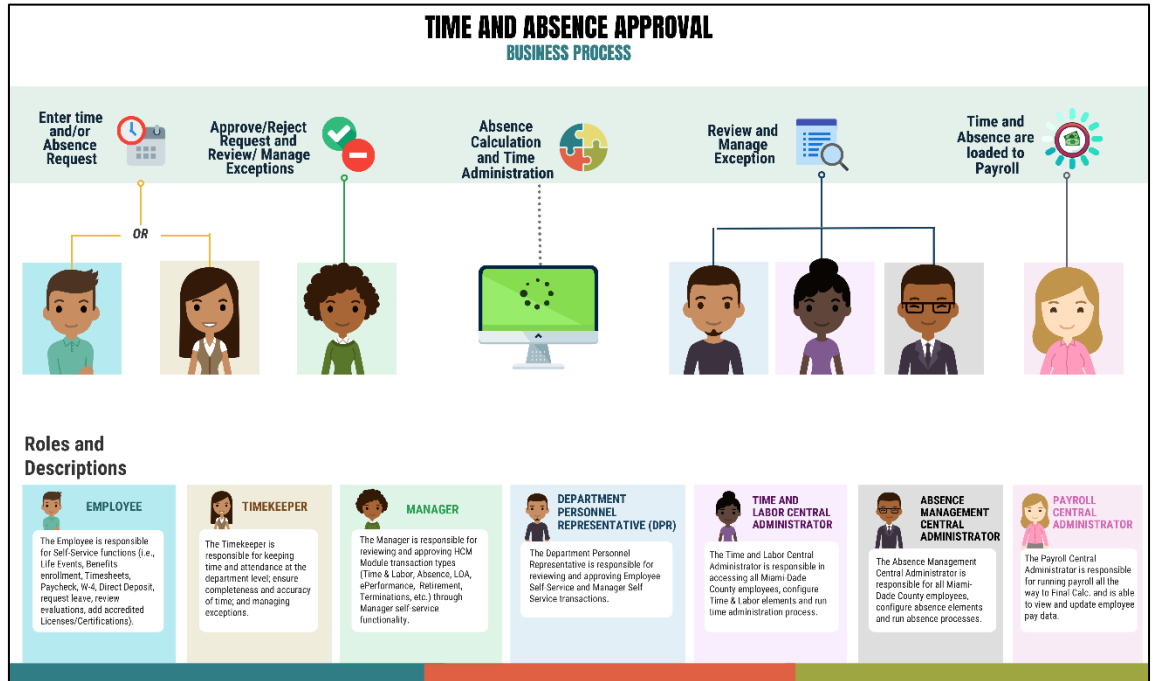


Now that you have completed the lesson, you should be able to:

- Understand the Elapsed Schedule
- Assign a Personal Schedule
- Manage Schedules

Lesson 6: Maintain Teleworkers

Lesson 6: Introduction



Lesson 6: Maintain Teleworkers

Lecture 1: Maintain Teleworkers

The telework status for employees belonging to Bargaining Unit L must be documented. In order to update the telework status, navigate to Maintain Teleworkers.

Navigation: Menu > Navigator > Human Capital Management (HCM) > Workforce Administration > Job Information > Maintain Teleworkers

Select **Add New Value**.

Lesson 6: Maintain Teleworkers

Lecture 1: Maintain Teleworkers

Input **Employee ID** and select **Add**.

Under **Telework Status** tab, input the **Start Date**, **End Date** (if applicable), **Recurring Days/Week**, and **Average Days/Months** for Telework Details.

Lesson 6: Maintain Teleworkers

Lecture 1: Maintain Teleworkers

Note: If telework assignment is due to disability arrangements, the DPR can select the Disability Arrangement; temporary disability or permanent disability.

Under the **Location** tab, DPRs can input the **Worksite** and work **Location** of the employee.

The screenshot shows the 'Maintain Teleworkers' interface with the 'Location' tab selected. The 'Worksite' and '*Location' dropdown menus are highlighted with red boxes. The interface includes fields for Start Date (10/23/2023), End Date, Country (USA), and Address, along with buttons for Save, Notify, Add, and Include History.

Note: If home is selected, the location is defaulted to the employee’s address.

Under the **Agreement** tab, select the **Equipment/Service Costs**, **Telework Agreement**, and **Telework Agreement Status**.

The screenshot shows the 'Maintain Teleworkers' interface with the 'Agreement' tab selected. The 'Equipment/Services Costs', 'Telework Agreement', and 'Telework Agreement Status' sections are highlighted with a red box. The interface includes radio buttons for equipment costs, a checkbox for telework agreement, and a table for agreement status.

	*Status	*Status Date	Reason		
1				+	-

Lesson 6: Maintain Teleworkers

Lecture 1: Maintain Teleworkers

Select the **Save** button.

The screenshot shows the 'Maintain Teleworkers' form in the Informatics system. The form is titled 'Maintain Teleworkers' and is part of a 'Timesheet' section. It contains several sections for data entry:

- Telework Location:** Includes fields for 'Start Date' (10/23/2023) and 'End Date'. There are '+' and '-' buttons for adding or removing rows.
- Equipment/Services Costs:** A section with radio button options:
 - No associated equipment/service costs incurred
 - Organization provides/purchases all equipment/services
 - Teleworker purchases all equipment/services
 - Costs are shared or negotiated between organization and teleworker
 - Other
- Telework Agreement:** Includes a checked checkbox 'Telework Agreement is in place' and an 'Agreement Date' field (10/23/2023) with a calendar icon.
- Telework Agreement Status:** A table with columns for '*Status' and '*Status Date'. It shows one entry with status 'Approved' and date '10/03/2023'. There are '+' and '-' buttons for adding or removing rows.

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', and 'Include History'. The 'Save' button is highlighted with a red box. Below the buttons, there is a breadcrumb trail: 'Telework Status | Location | Agreement'.

Lesson 6: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment

Scenario An employee's schedule is switched to teleworking. As the Department Personnel Representative (DPR), you need to update the telework status for the employee.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 6: Training Exercise

Debrief



1. Which tab is selected to add employee telework start date?
 - a) Telework Status
 - b) Location
 - c) Agreement
 - d) None of the Above

Lesson 6: Maintain Teleworkers

Lesson Summary

Now that you have completed the lesson, you should be able to:

- Update teleworker information for job basis employees in Bargaining Unit L



Lesson 7: Reports and Queries

Lesson 7: Overview

At the conclusion of this lesson, you will be able to:

- Understand the list of Reports:
 - **RPT-HR-486:** Employees TRC by Pay Period Ending Date & Business Unit
 - **RPT-HR-506:** Floating Holiday Available
 - **RPT-HR-509:** Employees Leave Balances
 - **RPT-HR-517:** TRC Code Overtime Report
 - **RPT-HR-536:** Overtime and Earning Code, Detail Report

Lesson 7: Reports and Queries

Key Terms



The following key terms are used in this Lesson.

Term	Definition
N/A	N/A

Lesson 7: Reports and Queries

Lecture 1: Reports and Queries

The list of reports available for Department Personnel Representative (DPR) to use in INFORMS. DPRs can view the HR Fundamentals course to review detail instructions on how to process these reports in INFORMS.

Report Name	Report Description
RPT-HR-486: Employees TRC by Pay Period Ending Date & Business Unit	This report provides a list of employees Time reporting code by pay period.
RPT-HR-506: Floating Holiday Available	This report is designed to provide a list of Floating holidays available by business unit.
RPT-HR-509: Employees Leave Balances	This report is designed to display the leave balances for employees prompted by business unit.
RPT-HR-517: TRC Code Overtime Report	This report focuses on the Time Reporting Code for Over Time reports. This is prompted by the Business Unit and Time Reporting Code date range.
RPT-HR-536: Overtime and Earning Code, Detail Report	This report is Overtime and earning code report. This is prompted by the Union code and Pay reporting ending date.

Lesson 7: Lesson Summary

Objectives Achieved



Now that you have completed the Report and Queries lesson, you should be able to:

- Understand the list of Reports:
 - **RPT-HR-486:** Employees TRC by Pay Period Ending Date & Business Unit
 - **RPT-HR-506:** Floating Holiday Available
 - **RPT-HR-509:** Employees Leave Balances
 - **RPT-HR-517:** TRC Code Overtime Report
 - **RPT-HR-536:** Overtime and Earning Code, Detail Report

Module 3: Course Summary

Objectives Achieved



Congratulations! You have completed the Time Management course. You now should be able to:

- Approve an employee's time on behalf of a Manager
- Approve Absence
- Understand and resolve the different severity levels of exceptions
- Manage Work Schedule
- Maintain Teleworker
- Reports & Queries

Next Steps

Now that you have completed the course, please make sure to complete the following tasks:

- Course assessment (tests your knowledge of the content)
- Course evaluation (collects course feedback)
- Log off your workstation

Reference Materials

Reference Materials



If you have further questions about any of the topics presented in this course, use the following resources:

User Productivity Kits

- Approve Time (Approve Time on Behalf of Manager)
- Approve Absence (Review Absence Balance Through Forecast Balance)
- Approve Absence (Approve Absence)
- Manage Exceptions
- Manage Work Schedule (Assigning a Personal Schedule)
- Manage Work Schedule (Managing Schedules)
- Maintain Teleworker

Reference Materials

Reference Materials



Job Aids:

- Time and Leave – New Task Profile Creation
- Time and Leave – Charging Time in Task Profile

For additional Information:

- www.miamidade.gov/informs

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Payable Time	Time after it has been processed and rules applied to create differentials, supplements, and overtime.
Reported Time	Time as it is entered on the timesheet. This is what Managers will approve.
Task groups	Assigned to the employee, controls available Task Profiles on the timesheet.
Time Administration	INFORMS system process to trigger all the rules and generate exceptions.
Time Collection Devices (TCDs)	A method for collecting reported time outside of the online timesheet in Time and Labor.
Time Reporter Type	Determines the information of an employee must provide for work hours on the timesheet, Punched or Elapsed.
Time Reporting Codes (TRCs)	It is used to track various hours worked and pay supplements. Absences takes are mapped to TRCs and TRC are mapped to earning codes in Payroll.
Time Reporting Template	Determines fields used for time entry. There is an Elapsed Time Reporting Template and a Punch Time Reporting Template
Workgroups	Grouping of employees that share common Time and Labor attributes and rules.
Absence Accrual	Periodic calculation of actual entitlement earned.
Absence Balance	Leave balance available for the employee to use.
Absence Entitlement	Leave Types that have associated balances to decrement when used, could have an accrual that adds to balance as earned. i.e. Sick, Annual.
Absence Request	Method of entering leave includes an Absence Type and Date(s).

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Absence Take	Type of leave requested, linked to one or multiple TRC(s) (Time Reporting Code) in T&L (if cascading).
Eligibility Group	Determines which leave entitlements an employee is eligible for, assigned on the Payroll Tab of Job data, also determines the accrual rates for entitlements.
Forecasting / Check Eligibility	Validation of sufficient balance and other additional criteria for an Absence Request.
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.
Exceptions	Any time reported that are not in compliance with the Pay Plan or CBA (Collective Bargaining Agreements) rules.
High Exception	Exceptions with a High severity level must be resolved in order for the reported time associated with the exception to become payable time. Data must be changed in the timesheet and re-submitted. Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Medium Exception	Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Low Exception	Low severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Payable Time	Time loaded into payroll.
Elapsed Schedule	Schedules that show the duration of time that the employee worked. i.e. the employee worked eight hours on Monday, forty hours for the week.