
End-User Training Guide

Course Code: MSS 204

**Course: Manager Self Service – Time Management
- Timekeeper**

Course Overview

Course Description

This course provides a comprehensive review of the Time Management - Timekeeper processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Time Management
 - Enter Time on Behalf of Employee
 - Submit Absence on Behalf of Employee
 - Manage Work Schedules
- Module 3: Course Summary

Training Audiences

The following audience(s), by INFORMS Security role(s), are required to complete this course prior to being granted related INFORMS access:

- Timekeeper

Prerequisites

Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of ERP
- ERP 102 – INFORMS Navigation, Reporting, and Online Help

Other Related Courses

N/A

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 3 Hours

Table of Contents

Content	Page
Course Overview	2
Module 1: Course Introduction	4
Module 2: Time Management	13
○ Lesson 1: Enter Time on Behalf of Employee	14
○ Lesson 2: Submit Absence on Behalf of Employee	25
○ Lesson 3: Manage Work Schedule	42
Module 3: Course Summary.....	59

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 INFORMS 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:

- 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

Training Audience: Roles and Responsibilities

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

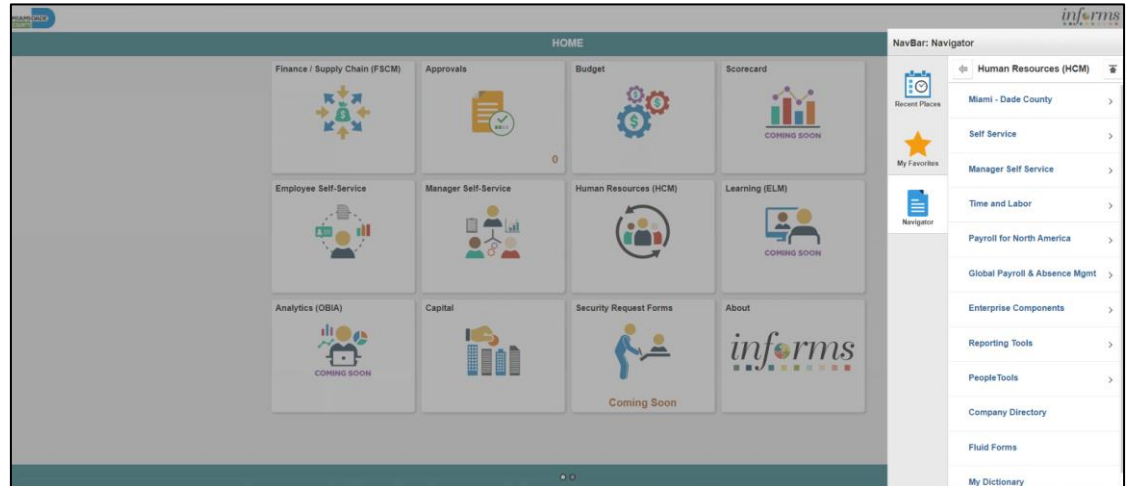
- **Timekeeper:** The Timekeeper is responsible for keeping time and attendance at the department level, ensure completeness and accuracy of time and manage exceptions.

Module 1: Course Introduction

Navigation

Below are the steps to navigate to the Navigator (NavBar), which will be used for navigation in the rest of this course:

Navigation: **Human Resources (HCM)**



Module 1: Course Introduction

Purpose and Benefits of the Business Process

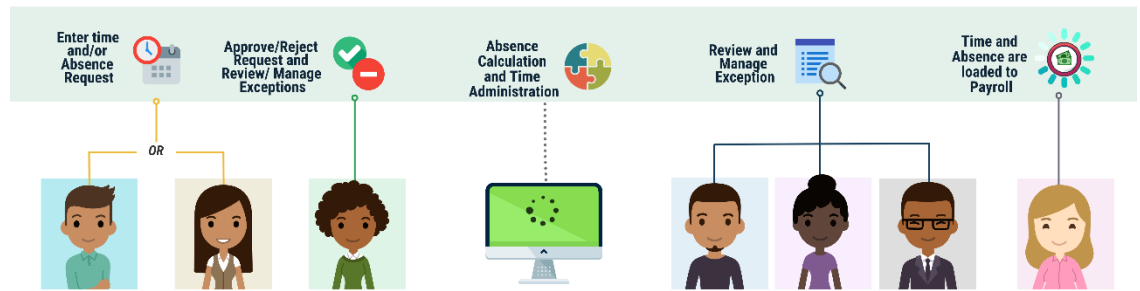
The purpose and benefits of the Time Management business process include:

- HR 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

TIME AND ABSENCE APPROVAL BUSINESS PROCESS



Roles and Descriptions

<p>EMPLOYEE</p> <p>The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/certifications).</p>	<p>TIMEKEEPER</p> <p>The Timekeeper is responsible for keeping time and attendance at the department level ensure completeness and accuracy of time.</p>	<p>MANAGER</p> <p>The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.</p>	<p>DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)</p> <p>The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self-Service transactions.</p>	<p>TIME AND LABOR CENTRAL ADMINISTRATOR</p> <p>The Time and Labor Central Administrator is responsible in accessing all Miami-Dade County employees, configure Time & Labor elements and run time administration process.</p>	<p>ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR</p> <p>The Absence Management Central Administrator is responsible for all Miami-Dade County employees, configure absence elements and run absence processes.</p>	<p>PAYROLL CENTRAL ADMINISTRATOR</p> <p>The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.</p>
--	---	---	--	--	--	--

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
- Navigation
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 2: Time Management

Lessons

This module includes the following lessons:

- Enter Time on behalf of Employee
- Submit Absence on behalf of Employee
- Manage Work Schedule

Lesson 1: Enter Time on Behalf of Employee

Lesson 1: Overview

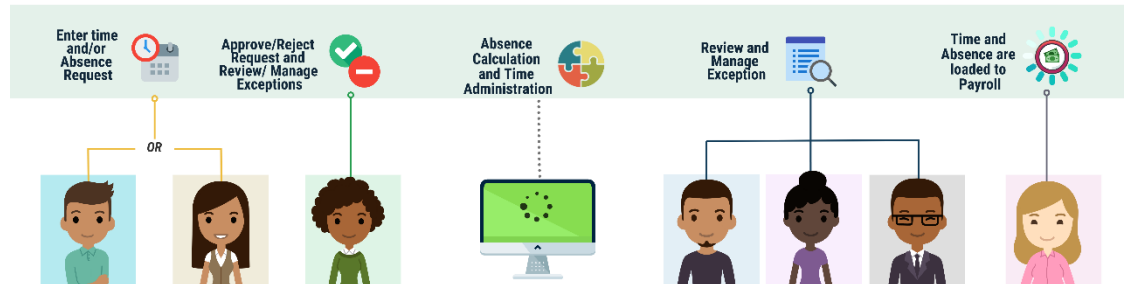
At the conclusion of this lesson, you will be able to:

- Acknowledge the difference between reported and payable time
- Enter time on behalf of an employee using an elapsed timesheet

Lesson 1: Enter Time on Behalf of Employee

Lesson 1: Introduction

TIME AND ABSENCE APPROVAL BUSINESS PROCESS



Roles and Descriptions

<p>EMPLOYEE</p> <p>The Employee is responsible for Self-Service functions (i.e. Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit), request leave, review evaluations, add accredited Licenses/Certifications).</p>	<p>TIMEKEEPER</p> <p>The Timekeeper is responsible for keeping time and attendance at the department level, ensure completeness and accuracy of time.</p>	<p>MANAGER</p> <p>The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.</p>	<p>DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)</p> <p>The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self-Service transactions.</p>	<p>TIME AND LABOR CENTRAL ADMINISTRATOR</p> <p>The Time and Labor Central Administrator is responsible in accessing all Miami-Dade County employees, configure Time & Labor elements and run time administration process.</p>	<p>ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR</p> <p>The Absence Management Central Administrator is responsible for all Miami-Dade County employees, configure absence elements and run absence processes.</p>	<p>PAYROLL CENTRAL ADMINISTRATOR</p> <p>The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.</p>
--	--	---	--	--	--	--

Lesson 1: Enter Time on Behalf of Employee

Key Terms



The following key terms are used in this module:

Term	Definition
Reported Time	Time as it is entered on the timesheet. This is what Managers will approve.
Payable Time	Time after it has been processed and rules applied to create differentials, supplements, and overtime.

Lesson 1: Enter Time on Behalf of Employee

Lecture 1: Timekeeping during the Current Period

In the event that an employee is away and or unable to enter time or an absence, Timekeepers can enter the employee's time on their behalf.

The following topics will be discussed in this course:

- Timekeeping during the Current Period
 - Reported versus Payable Time
 - Online Time Entry Users
 - Key Impacts
- Entering Time on Behalf of an Employee
 - Submitting an Elapsed Time Timesheet
- Entering an Absence on Behalf of an Employee using Absence Management
 - Submitting an Absence through Absence Management

Lesson 1: Enter Time on behalf of Employee

Lecture 1: Timekeeping during the Current Period

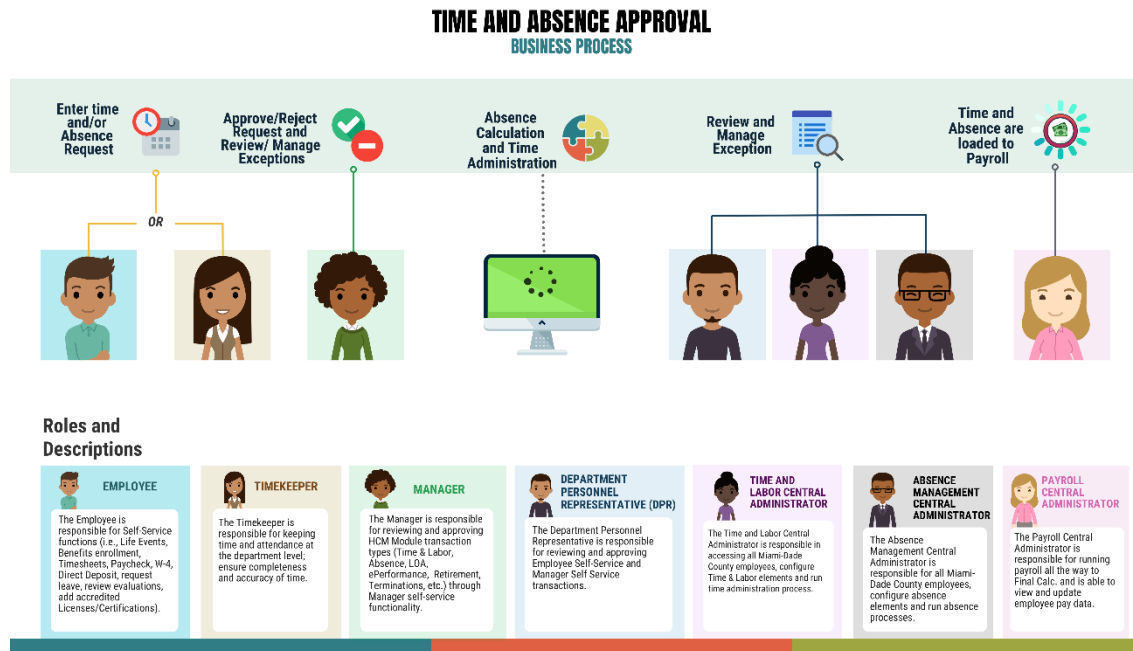
Timekeeping during the Current Period

Reported versus Payable Time

After an employee submits time through the timesheet, it is sent to the Manager for approval. Once the timesheet is approved, the time is analyzed through the INFORMS Time Administration process. The time that was submitted by the employee is known as *reported time*. Once the reported time is processed through Time Administration, it generates *payable time*.

If the employee’s Manager is unable to review and approve the time, their second level Manager can approve this request. In the event that a manager cannot approve by the deadline, the Department Personnel Representative (DPR) can approve on the Manager’s behalf.

Once reported time is approved by either the Manager or Department Personnel Representative (DPR), the Time Administration process will produce *payable time* which is sent to Payroll. The following business process flow outlines the timekeeping process:



Lesson 1: Enter Time on behalf of Employee

Lecture 1: Timekeeping during the Current Period

Payable time is the end product of the Time and Labor module. Payable time represents:

- The quantity of work performed, in hours or dollars
- The time reporting code that controls how the employee is paid
- The tasks to which time was reported by the employee

Online Time Entry Users

All employees who report time in the Miami-Dade County INFORMS Time and Labor module use the same pages to report work hours and tasks. These time reporting pages are the same pages that the employee's supervisor and the Department Personnel Representative (DPR)s view to approve time, too.

Key Impacts

The implementation of INFORMS Time and Labor enables the following new capabilities to departments and their employees:

- In INFORMS, there is now a single page that is used for both payment and task distribution purposes. The time and task reporting are done on the same line in the timesheet, and additional lines can be added for additional task reporting details or for more than two iterations.

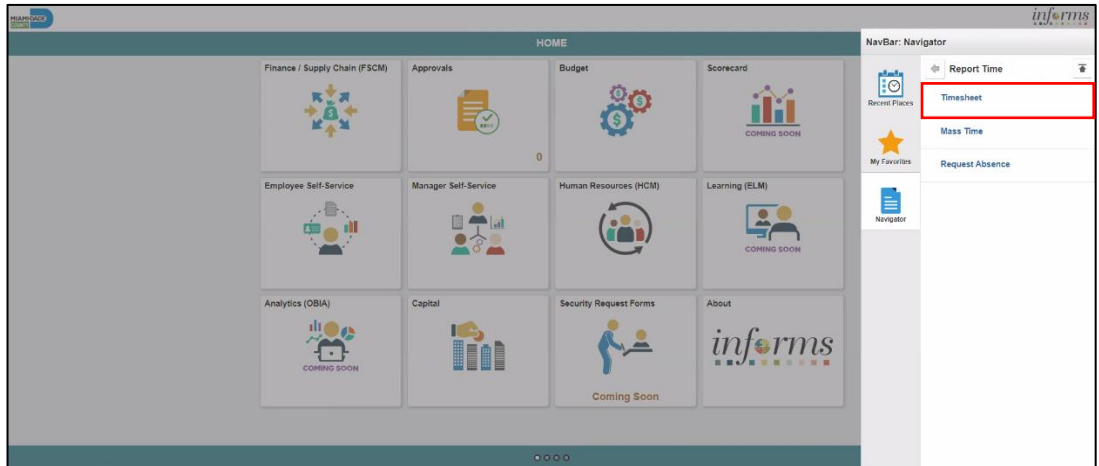
Lesson 1: Enter Time on behalf of Employee

Lecture 2: Enter Time on behalf of Employee

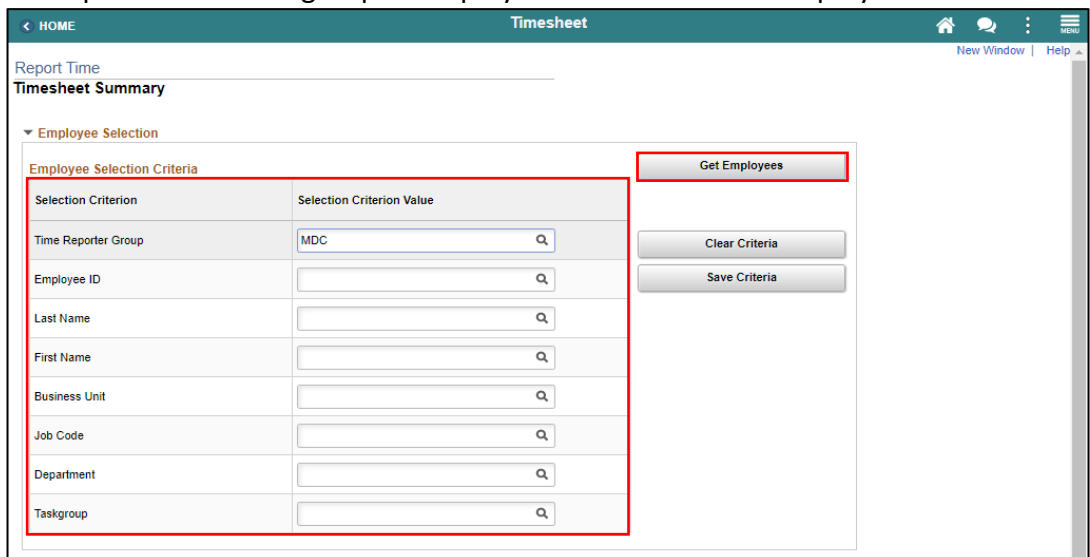
Enter Time on Behalf of an Employee

The following steps outline how the Timekeeper 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: Enter Time on behalf of Employee

Lecture 2: Enter Time on behalf of 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. Entered time and select the appropriate **Time Reporting Code** before Submitting the employee's time.

Timesheet

Levy Abney
Airport Operations Agent
Employee ID 00138064
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

5. Select **Submit**.

Timesheet

Chrisawn Arsenaull
Supv. Hr. Testing & Validation
Employee ID 00053129
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

Submit Apply Schedule

Lesson 1: Training Activity 1

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

Scenario An employee is unable to submit their timesheet before time is due. As the Timekeeper, you must submit the employee's time on their behalf.

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 1: Training Exercise

Debrief



1. When does reported time change to payable time?

2. What are the recommended fields that a Timekeeper can enter when searching for an employee on the **Timesheet** page?

Lesson 1: Lesson Summary

Objectives Achieved



Now that you have completed the Enter Time on Behalf of Employee lesson, you should be able to:

- Acknowledge the difference between reported and payable time
- Enter time on behalf of an employee using an elapsed timesheet

Lesson 2: Submit Absence on Behalf of Employee

Lesson 2: Overview

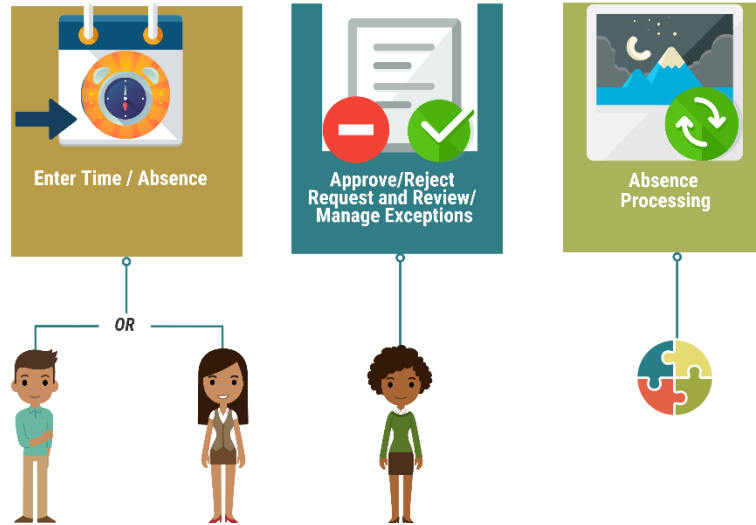
At the conclusion of this lesson, you will be able to:

- Enter an Absence on Behalf of an Employee using Absence Management
- Submit Partial Day Absence on Behalf of an Employee

Lesson 2: Submit Absence on Behalf of Employee

Lesson 2: Introduction

ABSENCE PROCESSING BUSINESS PROCESS



ROLES AND DESCRIPTIONS

EMPLOYEE

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).

TIMEKEEPER

The Timekeeper is responsible for keeping time and attendance at the department level; ensure completeness and accuracy of time.

MANAGER

The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.

SYSTEM INFORMS

The administrative process that is performed.

Lesson 2: Submit Absence on Behalf of Employee

Key Terms



The following key terms are used in this module:

Term	Definition
Absence Event	The period for which an employee is absent for the same reason.
Adjustment	A deduction or addition made from/into the Absence Entitlement balance.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically in hours or partial.
Absence Balance	Leave balance available for the employee to use.
Absence Accrual	Periodic calculation of actual entitlement earned.
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).
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.

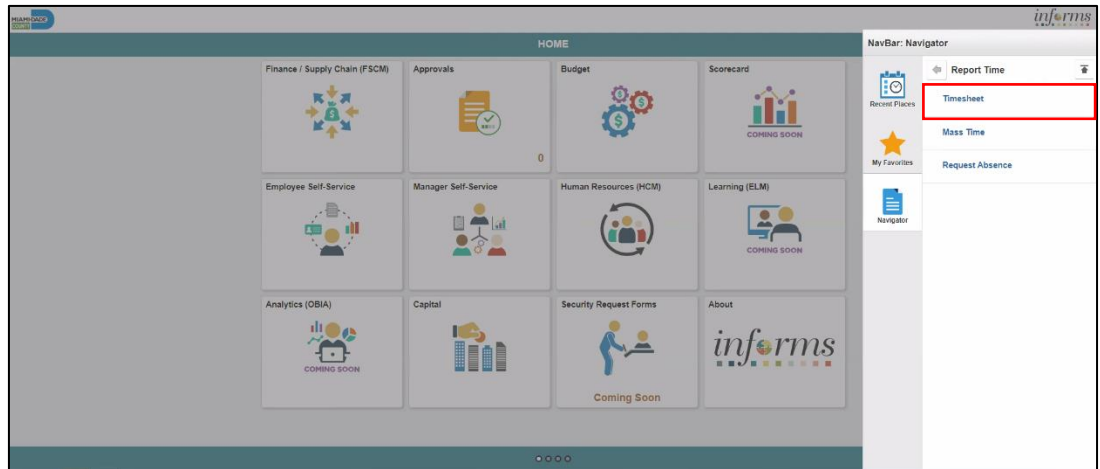
Lesson 2: Submit Absence on Behalf of an Employee

Lecture 1: Submit Absence on Behalf of an Employee

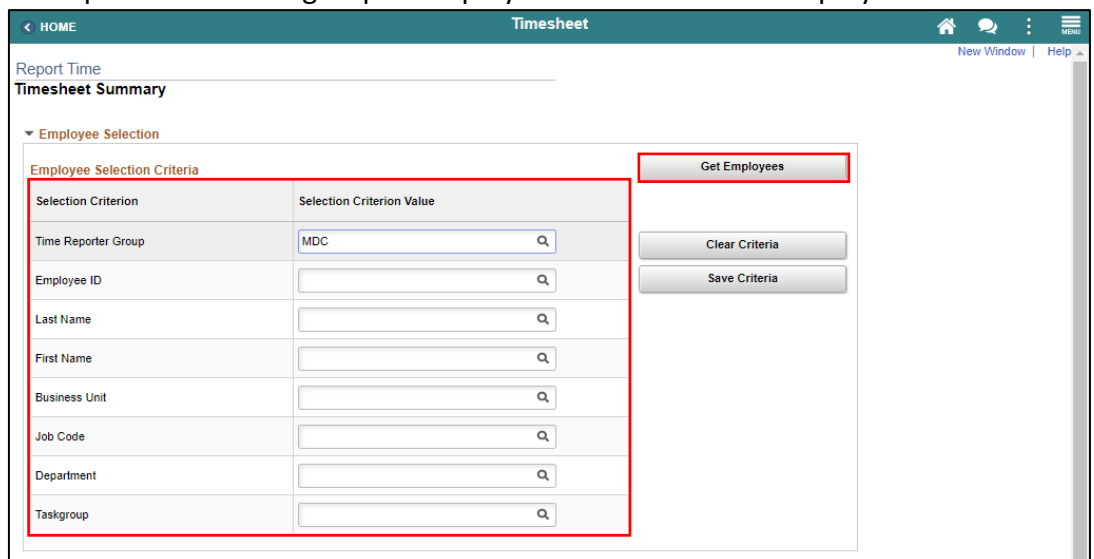
Submit Absence on Behalf of an Employee

The following steps outline how the Timekeeper 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 2: Submit Absence on behalf of an Employee

Lecture 1: 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

Levy 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

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		
8.00	8.00	8.00					24.00	REG - Regular Time	06325007		
2.00							2.00	ANNL - Annual Leave	06325007		

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 2: Submit Absence on behalf of an Employee

Lecture 1: Submit Absence on Behalf of an Employee

6. Select **Add Absence Event**.

The screenshot shows the 'Absence Events' page with tabs for 'Reported Time Status', 'Summary', 'Absence', 'Exceptions', and 'Payable Time'. The 'Absence' tab is active. Below the tabs is a table with columns: Select, Start Date, End Date, Absence Name, Reason, Unit Type, Details, Status, Approval Monitor, Source, Cancel, and Edit. An 'Add Absence Event' button is located at the bottom left of the table area and is highlighted with a red box.

7. Enter the following information:

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

The screenshot shows the 'Absence Events' page with the 'Absence Take' tab active. A table row is visible with 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 box.

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' page with the 'Forecast Results' tab active. The table row from the previous screenshot is still visible. The 'Forecast' button in the 'Forecast' column is highlighted with a red box.

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

Lesson 2: Submit Absence on behalf of an Employee

Lecture 1: 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	PSNONCATSK				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

OK

Lesson 2: Submit Absence on behalf of an Employee

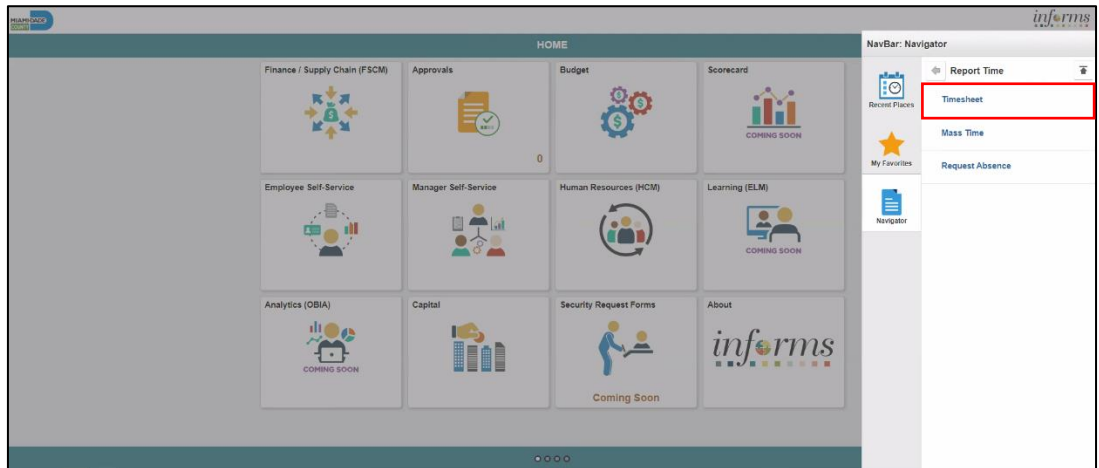
Lecture 2: Submit Partial Day Absence on Behalf of an Employee

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.

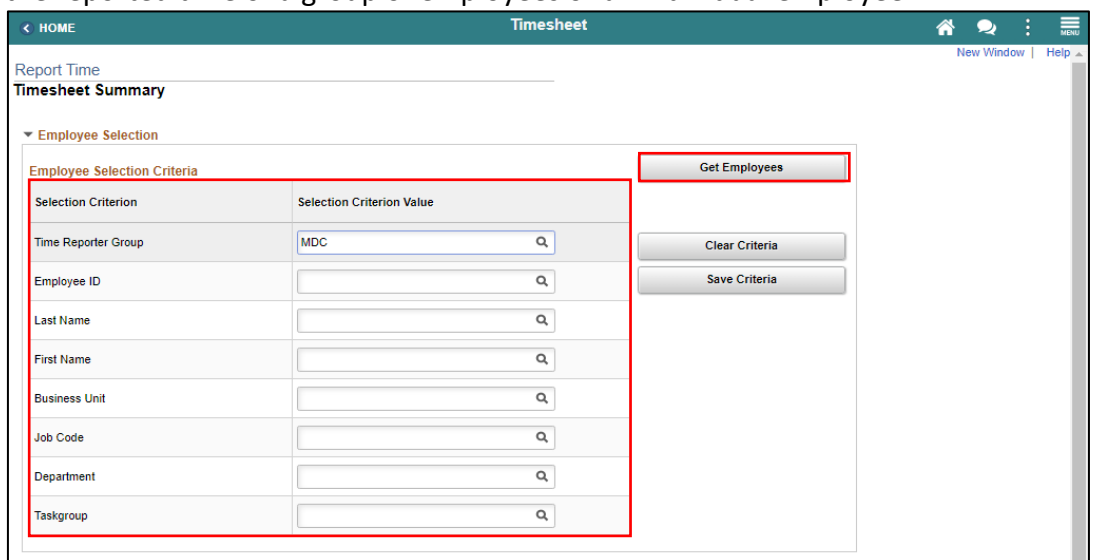
Submit Partial Day Absence on Behalf of an Employee

The following steps outline how the Timekeeper can submit a 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 2: Submit Absence on behalf of an Employee

Lecture 2: Submit Partial Day 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

Levy 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

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		
8.00	8.00	8.00					24.00	REG - Regular Time	06325007		
2.00							2.00	ANNL - Annual Leave	06325007		

Submit

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

Reported Time Status

Lesson 2: Submit Absence on behalf of an Employee

Lecture 2: Submit Partial Day Absence on Behalf of an Employee

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

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**.

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

Lesson 2: Submit Absence on behalf of an Employee

Lecture 2: Submit Partial Day 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 2: Submit Absence on behalf of an Employee

Lecture 2: Submit Partial Day 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 2: Submit Absence on behalf of an Employee

Lecture 2: Submit Partial Day Absence on Behalf of an Employee

14. Select **Calculate Duration**.

Absence Detail ⓘ

*Start Date: 05/23/2022 [View Monthly Calendar](#)

End Date: 05/23/2022

Filter by Type: All ▼

*Absence Name: Annual Leave ▼ Current Balance 474.25 Hours**

Partial Days: All Days ▼

All Days Hours: 2.00

Duration: 2.00 Hours

Calculate Duration

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

Comments

Reporter Comments:

16. Select **OK**.

SS Create Absence Req [x]

Chrishawn Arsenault
Supv, Hr Testing & Validation

▼ **Instructions**
Enter Start Date, End Date, and Absence Name. Then complete the rest of the required fields before returning to the Timesheet page.

Absence Detail ⓘ

*Start Date: 05/23/2022 [View Monthly Calendar](#)

End Date: 05/23/2022

Filter by Type: All ▼

*Absence Name: Annual Leave ▼ Current Balance 474.25 Hours**

Partial Days: All Days ▼

All Days Hours: 2.00

Duration: 2.00 Hours

Calculate Duration

Comments

Reporter Comments:

OK **Cancel**

Lesson 2: Submit Absence on behalf of an Employee

Lecture 2: Submit Partial Day 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	05/23/2022	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

Chrisshaw Arseneault
Supr. H Testing & Validation

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

Reported Hours: 8.00

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	OCL Jobcode	Source
8.00							8.00	ANNL - Annual Leave	PSNKCATSJK				Absence Management

Submit (highlighted) 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 2: Training Activity 1

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

Scenario An employee is out of the office due to illness and is unable to enter the absence event himself. He took a half day on his first sick day, so he is missing a total of two and a half business days of work. As the Timekeeper, you need to enter the absence on behalf of 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 2: Training Exercise

Debrief



1. What is required to submit an Absence successfully?
 - a) Add Comment
 - b) Add Attachment
 - c) Check Eligibility
 - d) All of the Above
2. A Timekeeper has to approve the Absence requested on behalf of an employee.
 - a) True
 - b) False

Lesson 2: Lesson Summary

Objectives Achieved



Now that you have completed the Submit Absence on Behalf of Employee lesson, you should be able to:

- Enter an Absence on Behalf of an Employee using Absence Management
- Submit Partial Day Absence on Behalf of an Employee

Lesson 3: Manage Work Schedule

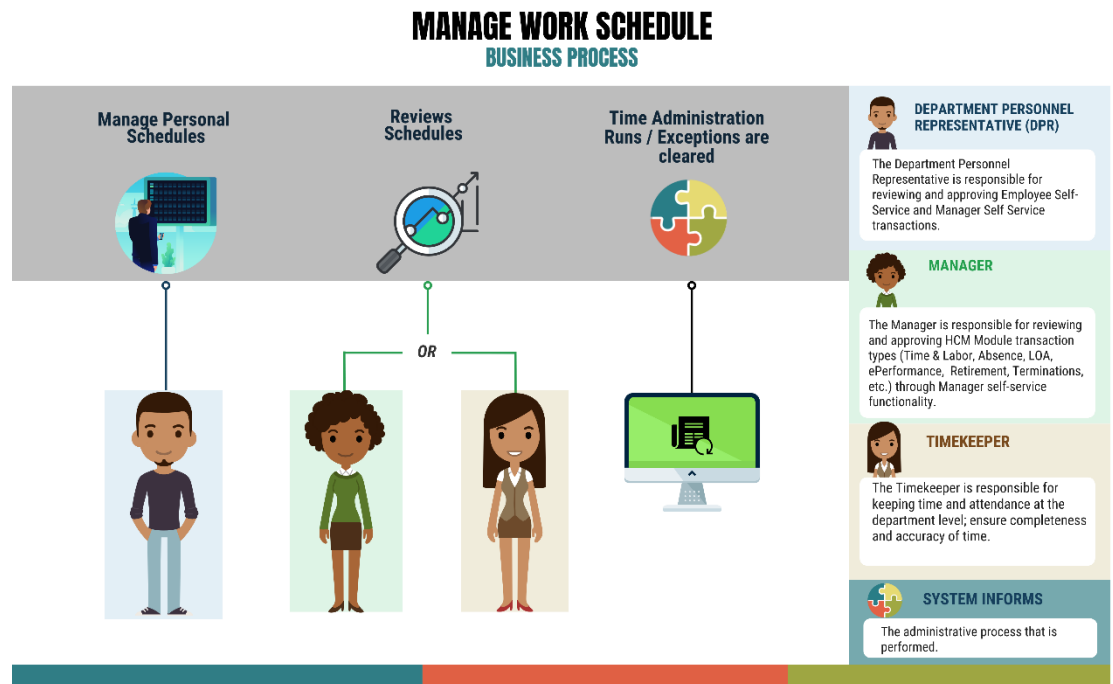
Lesson 6: Overview

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

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

Lesson 3: Manage Work Schedule

Lesson 3: Introduction



Lesson 3: Manage Work Schedule

Key Terms



The following key terms are used in this module:

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

Lesson 3: 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 3: Manage Work Schedule

Lecture 1: Overview of Schedules

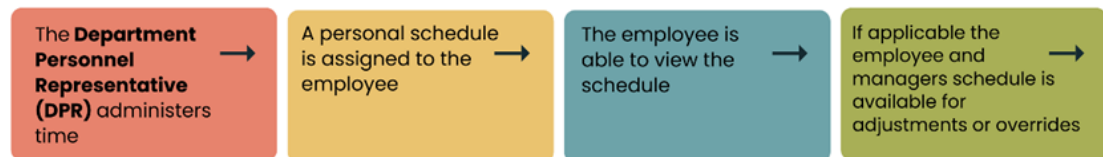
Process Changes

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 Timekeeper has the ability to create a personal schedule.

End-to-end Process

Below is the flow for assigning and maintaining schedules:



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.

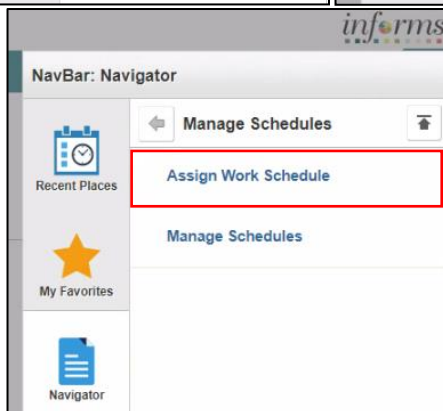
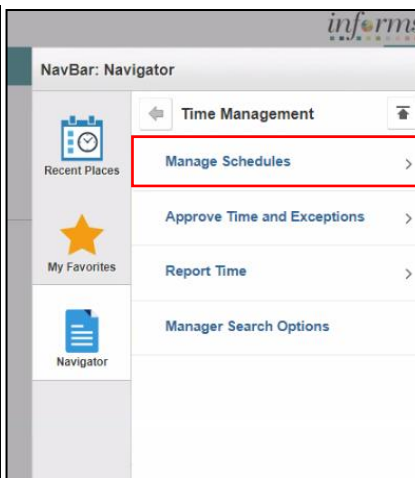
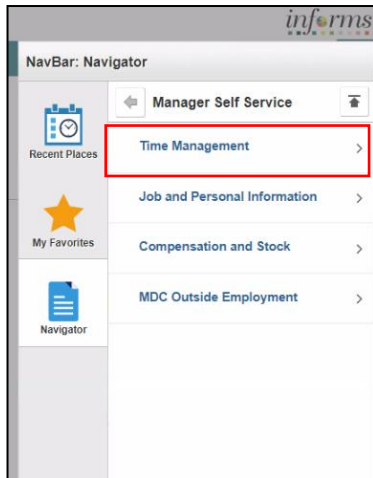
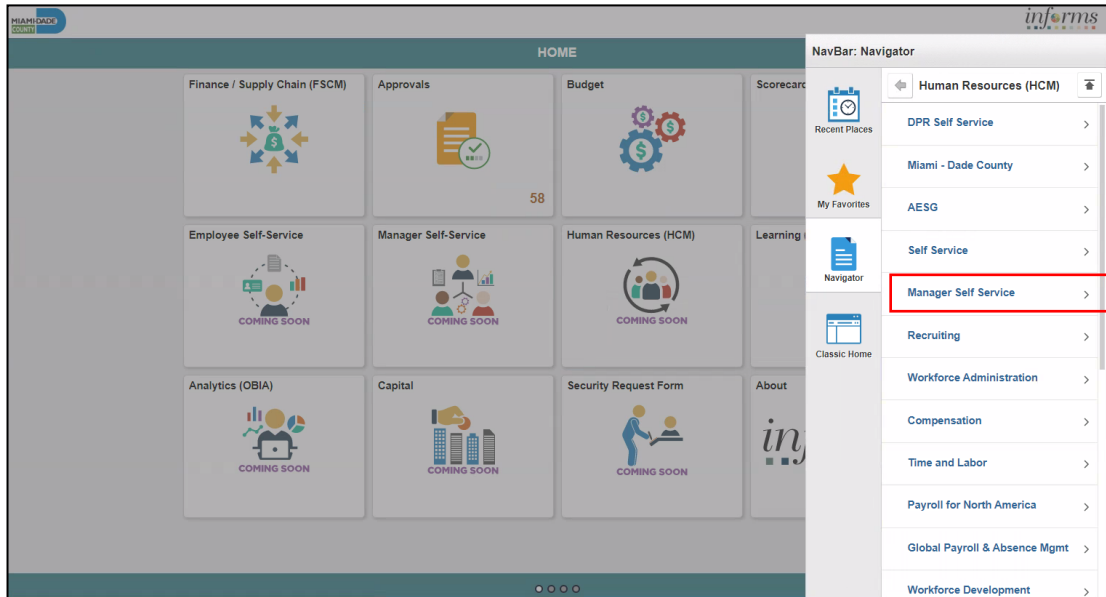
Lesson 3: Manage Work Schedule

Lecture 2: Personal Schedule

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) > Manage Self Service > Time Management > Manage Schedules > Assign Work Schedule.**



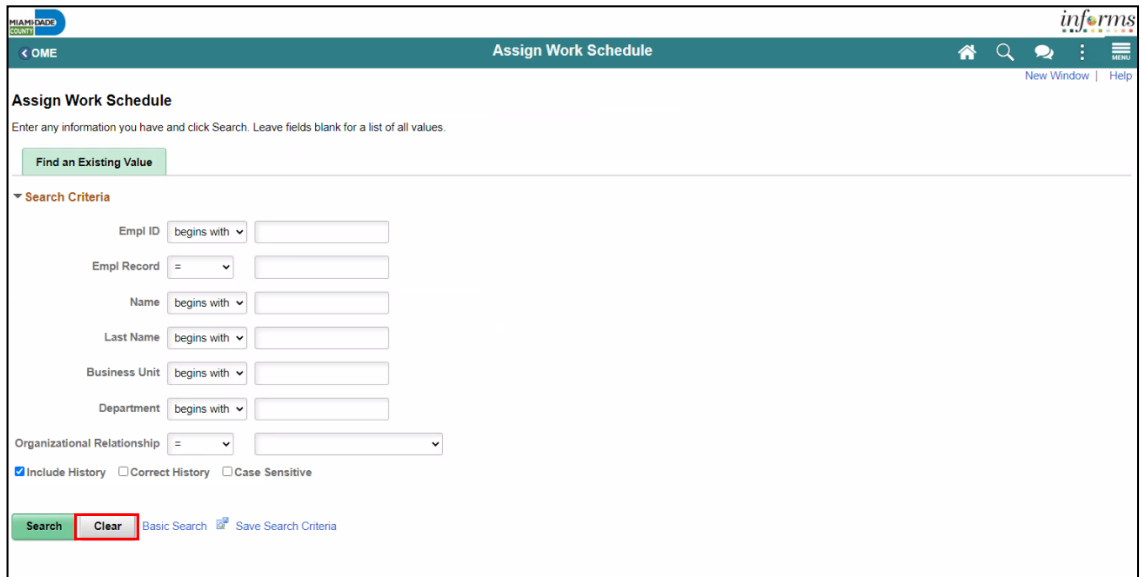
Lesson 3: Manage Work Schedule

Lecture 2: Personal Schedule

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.



MIAMI-DADE COUNTY

informs

< 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 3: Manage Work Schedule

Lecture 2: Personal Schedule

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.

The screenshot shows the 'Assign Work Schedule' interface for employee Maximilian Hessel (Employee ID: 00400870). The 'Assign Schedules' table is visible with the following data:

Effective Date	Assignment Method	Schedule Group	Schedule ID	Description	Create Schedule
10/09/2022	Create Personal Schedule	MDC	004008700000	UAT Test	Create Schedule
11/20/2021	Create Personal Schedule	MDC	004008700000	UAT Test	Show Schedule
11/15/2021	Use Default Schedule	MDC	ELPSD_BHR ADMIN	80 Bw/ 8 Hr - Sat, Sun Off	Show Schedule
11/01/2021	Use Default Schedule	MDC	ELPSD_BHR ADMIN	80 Bw/ 8 Hr - Sat, Sun Off	Show Schedule

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

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

The screenshot shows the 'Assign Work Schedule' interface with a new schedule assignment added to the top row. The 'Assignment Method' dropdown is set to 'Create Personal Schedule'. The 'Effective Date' is 05/09/2022, and the 'Schedule Group' is MDC. The 'Schedule ID' field is active and contains 004008700000. The 'Description' is 'UAT Test'. The 'Create Schedule' button is highlighted with a red box.

Effective Date	Assignment Method	Schedule Group	Schedule ID	Description	Create Schedule
05/09/2022	Create Personal Schedule	MDC	004008700000	UAT Test	Create Schedule
11/29/2021	Create Personal Schedule	MDC	004008700000	UAT Test	Show Schedule
11/15/2021	Use Default Schedule	MDC	ELPSD_BHR ADMIN	80 Bw/ 8 Hr - Sat, Sun Off	Show Schedule
11/01/2021	Use Default Schedule	MDC	ELPSD_BHR ADMIN	80 Bw/ 8 Hr - Sat, Sun Off	Show Schedule

Lesson 3: Manage Work Schedule

Lecture 2: Personal Schedule

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**.

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Create Schedule
05/09/2022	Create Personal Schedule	MDC	0040087000000	UAT Test	Create Schedule

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

Definition

Maximilian Bissell Empl ID 00400870
 Social Media Specialist Empl Record 0

Schedule Details

Effective Date: 05/10/2022

*Description: UAT Test

*Definition Type: Elapsed

*Daylight Saving Rule: Fixed Time

Short Description: UAT Test

Days in Schedule: 14

Taskgroup for Time Reporting

Default Taskgroup: [Search]

Task Template ID: [Search]

Time Reporting Template ID: [Search]

OK Cancel Apply Refresh

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

- Description
- Definition Type
- Daylight Saving Rule

Lesson 3: Manage Work Schedule

Lecture 2: Personal Schedule

Assigning a Personal Schedule

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

Definition

Maximilian Bissell | Job Title: Social Media Specialist | Empl ID: 00400870 | Empl Record: 0

Schedule Details

Effective Date: 05/10/2022 | Description: Test | Taskgroup: | Total Hours: 112.00 | Show Calendar

Shift Details

Select	Day	Workday ID	Shift ID	Off Shift	Sched Hrs	More
<input type="checkbox"/>	1	ON		<input type="checkbox"/>	8.00	More +
<input type="checkbox"/>	2	ON		<input type="checkbox"/>	8.00	More +
<input type="checkbox"/>	3	ON		<input type="checkbox"/>	8.00	More +
<input type="checkbox"/>	4	ON		<input type="checkbox"/>	8.00	More +
<input type="checkbox"/>	5	ON		<input type="checkbox"/>	8.00	More +
<input type="checkbox"/>	6	OFF		<input type="checkbox"/>	8.00	More +

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

Working with Shift Details

Select All | Deselect All | Copy | Paste | Clear Shifts

Days in Schedule: 14

Instructions

- To add blank days to the schedule increase the Days in Schedule.
- To add or remove a same day Shift use the standard add or delete button.
- To reuse a day in the schedule, select the day to copy, then select Copy.
- To select multiple days to copy, select the first and last day, and all days in between will be selected.
- To paste, select a day to restart the pattern, the number of repetition, then select Paste.
- To clear the shift information, select the rows for shifts to be cleared, then select Clear Shifts.
- To delete days, reduce Days in Schedule.

OK | Cancel | Apply | Refresh

Lesson 3: Manage Work Schedule

Lecture 2: Personal Schedule

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 ⓘ

🔍 1-5 of 5 | View All

Primary Schedule | Alternate Schedule | II>

*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

🔍 1-5 of 5

Primary Assignment History | Alternate Assignment History | II>

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			

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

🔍 1-5 of 5

Primary Assignment History | Alternate Assignment History | II>

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			

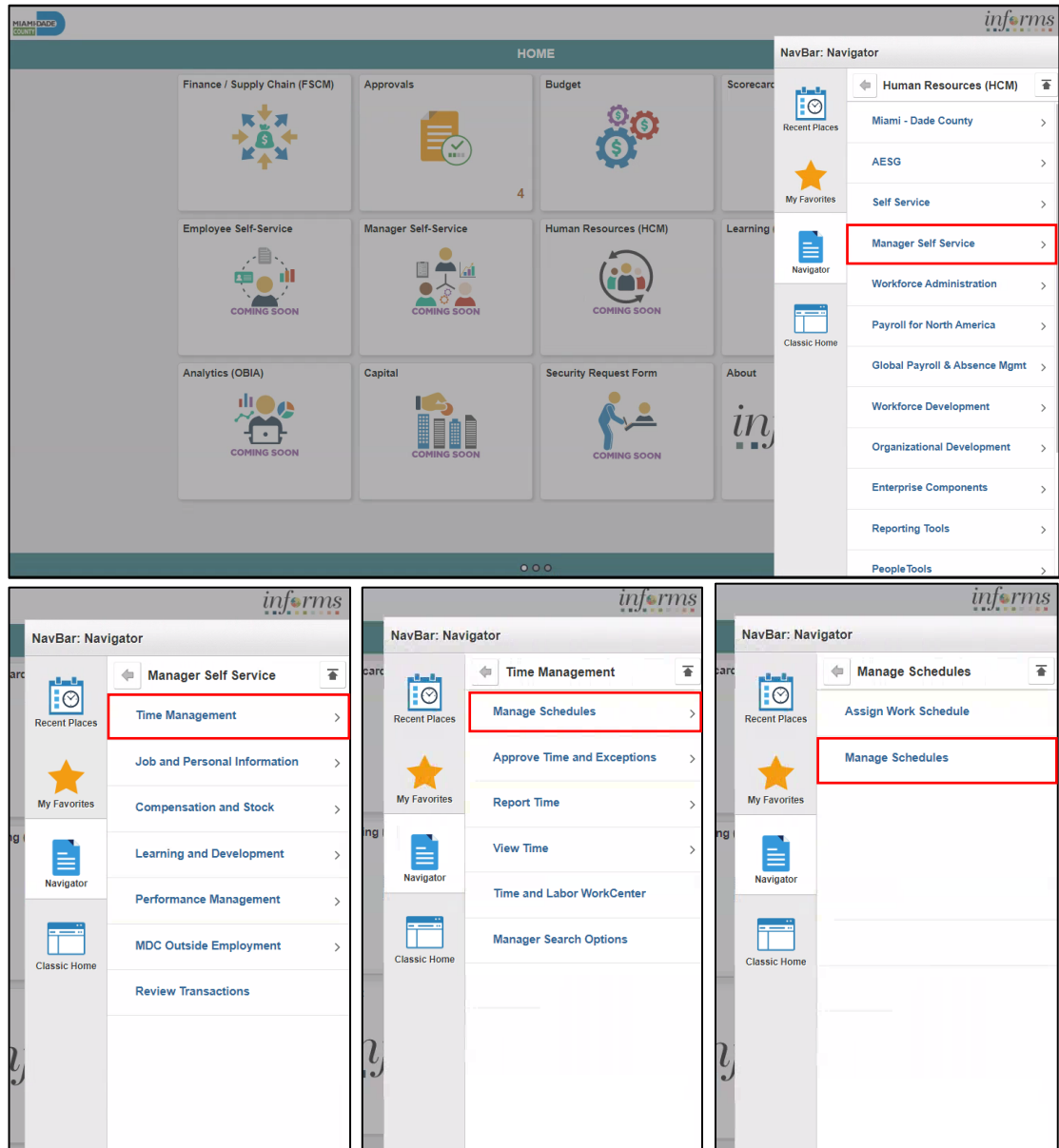
Lesson 3: Manage Work Schedule

Lecture 3: Manage Schedules

Manage Schedules

Overriding an Employee's Schedule for a Temporary Situation.

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



Lesson 3: Manage Work Schedule

Lecture 3: Manage 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.

Select	Last Name	First Name	Employee ID	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
Crossover Shift	Scheduled OFF Day
Holiday	Replaced Employee
Multiple Shifts	Shift has changing elements

Lesson 3: Manage Work Schedule

Lecture 3: Manage Schedules

- To make a change to the employee's schedule for the day, the manager 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

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

Schedule Detail ||>

Shift ID	Taskgroup	Off Shift	Sched Hrs
<input type="text"/>	<input type="text"/>	<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 3: Training Activity 1

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

Scenario An employee work schedule is 8 hours Monday through Friday. Schedule is being updated to Monday through Thursday with 10 hours shifts.

Instructions This activity 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 types of schedules that can be assigned to an employee?
 - a) Personal Schedule
 - b) Default Schedule
 - c) Personal Schedule
 - d) All of the Above

2. How does a Personal Schedule differ from a default schedule?

Lesson 3: Lesson Summary

Lesson Summary



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

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

Module 3: Course Summary

Objectives Achieved



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

- Enter Time on behalf of an employee
- Submit Absence on behalf of an employee
- Manage Work Schedules

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

- Enter Time on Behalf of Employee
- Submit Absence on Behalf of Employee
- Submit Partial Absence on Behalf of Employee
- Manage Work Schedule (Managing Schedules)
- Manage Work Schedule (Assign a Personal Schedule)

Reference Materials

Reference Materials



For additional Information:

- www.miamidade.gov/informs

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Absence Accrual	Periodic calculation of actual entitlement earned.
Absence Balance	Leave balance available for the employee to use.
Absence Event	The period for which an employee is absent for the same reason.
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).
Adjustment	A deduction or addition made from/into the Absence Entitlement balance.
Elapsed Schedule	Schedule that shows the duration of time that the employee worked. i.e. the employee worked eight hours on Monday, forty hours for the week.
Payable Time	Time after it has been processed and rules applied to create differentials, supplements, and overtime.
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.
Reported Time	Time as it is entered on the timesheet. This is what Managers will approve.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically, in hours or partial.