# Miami-Dade County

## End-User Training Guide

**Coursed Code: MSS 204**
**Course: Manager Self Service -Time Management**

## Course Overview

| | |
|---|---|
| **Course Description** | This course provides a comprehensive review of the Time Management processes.<br><br>This course consists of the following modules:<br><br>• Module 1: Course Introduction<br>• Module 2: Time Management<br>• 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 system access:<br><br>• Manager |
| **Prerequisites** | Participants are required to complete the following End-User Training courses prior to starting this course:<br><br>• ERP 101 - Overview of ERP<br>• ERP 102 - INFORMS Navigation and Online Help |
| **Other Related Courses** | Participants can attend the other related courses to Manager Self Service:<br><br>• MSS 205 - Manager Self Service - ePerformance Management (Employee Performance Evaluation)<br>• MSS 206 - Manager Self Service - Updating Team Information |
| **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<br>Day 1 (6 Hours)<br>Day 2 (4 Hours)<br>Total duration: 10 Hours |

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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:

- Approve Time and Absence
- View Forecast Balance
- Manage Exceptions
- Enter Time on behalf of Employee
- Submit Absence on behalf of Employee
- Manage Work Schedule

## 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:

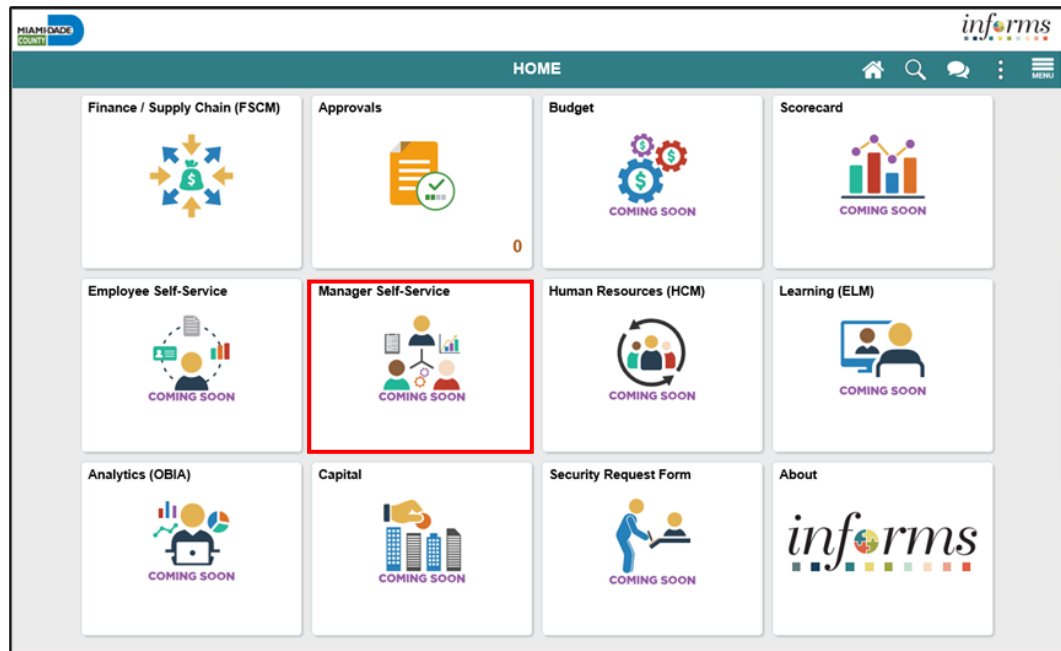- **Manager**: The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.

# Module 1: Course Introduction

**Navigation**

1. Login to the INFORMS and select **Manager Self-Service** from the home landing page.

## Module 1: Course Introduction

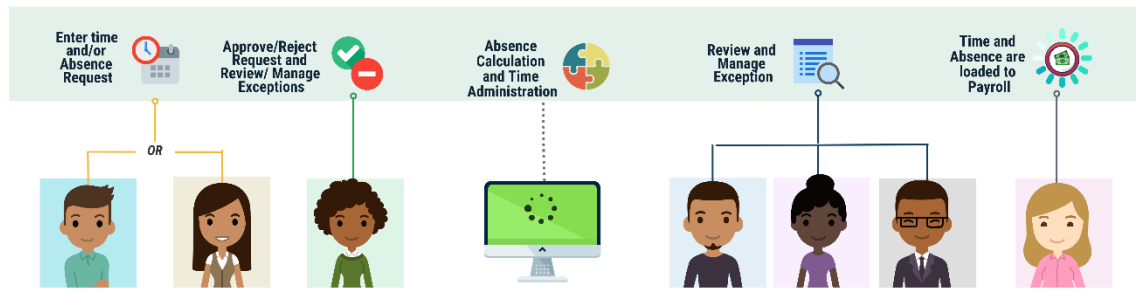Purpose and Benefits of the Business Process

The purpose and benefits of the Manager Self-Service 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

| Enter time and/or Absence Request | Approve/Reject Request and Review/ Manage Exceptions | Absence Calculation and Time Administration | Review and Manage Exception | Time and Absence are loaded to Payroll |
|---|---|---|---|---|

**Roles and Descriptions**

| EMPLOYEE | TIMEKEEPER | MANAGER | DEPARTMENT PERSONNEL REPRESENTATIVE (DPR) | TIME AND LABOR CENTRAL ADMINISTRATOR | ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR | PAYROLL CENTRAL ADMINISTRATOR |
|---|---|---|---|---|---|---|
| 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). | The Timekeeper is responsible for keeping time and attendance at the department level; ensure completeness and accuracy of time; and managing exceptions. | 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. | The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions. | The Time and Labor Central Administrator is responsible in accessing all Miami-Dade County employees, configure Time & Labor elements and run time administration process. | The Absence Management Central Administrator is responsible for all Miami-Dade County employees, configure absence elements and run absence processes. | 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. |

## 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
- Navigation
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

## Module 2: Time Management

Lessons

This module includes the following lessons:

- Approve Time and Absence
- Forecast Balances
- Manage Exceptions
- Enter Time on behalf of Employee
- Submit Absence on behalf of Employee
- Manage Work Schedule

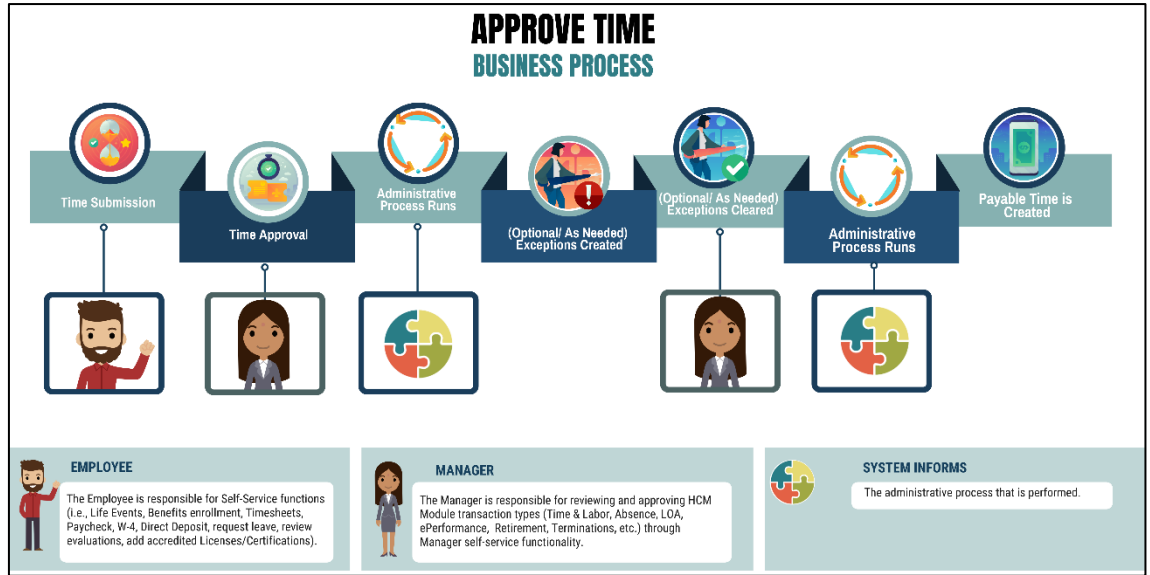## Lesson 1: Approve Time and / or Absence

**Lesson 1: Overview**

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

- Approve an employee's time and / or absence
- Check an employee's absence eligibility
- Learn the difference between Payable Time and Reported Time
- Understand that absence balances displayed on the employee's absence balance pages are from prior closed pay periods
- Understand that absence balances displayed on the employee's absence balance pages do not include accruals earned or hours taken after pay period.

## Lesson 1: Approve Time and / or Absence

Lesson 1:
Introduction



APPROVE TIME
**BUSINESS PROCESS**

Time Submission

Time Approval

Administrative Process Runs

(Optional/ As Needed) Exceptions Created

(Optional/ As Needed) Exceptions Cleared

Administrative Process Runs

Payable Time is Created

**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).

**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.



ABSENCE PROCESSING
**BUSINESS PROCESS**

Enter Time

OR

Approve/Reject Request and Review/ Manage Exceptions

Absence Processing

**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; and managing exceptions.

**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 1: Approve Time and / or 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 and absence takes an employee is eligible for, assigned on the Payroll Tab of Job data, also determines the accrual rates for entitlements. |
| **Exceptions** | Any time reported that are not incompliance with the pay plan or Collective Bargaining Agreement (CBA) rules. |
| **Forecasting / Check Eligibility** | Validation of sufficient balance and other additional criteria for an Absence Request. |
| **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. |
| **Task Profile ID** | Task values that allow you to track time and allocate cost for specific projects and activities. |

## Lesson 1: Approve Time and / or Absence

Key Terms
(Cont.)

The following key terms are used in this module:

| Term | Definition |
|---|---|
| **Taskgroup** | 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 1: Approve Time and / or Absence

Lecture 1:

Approve Time and Absence

**Approving Reported Time and / or Absence via the approval tile**

Employees may not get paid correctly if the reported time or absence is not approved. In the event that a manager is unable to review and approve an employee's time /absence, a Department Personnel Representative (DPR) can approve on the Manager's behalf. The Manager can approve time and absences by viewing all of the reported time and absence requests from the **Approval** tile in the home landing page.

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. Managers can view leave balances and absence requests of their direct reports in the Absence Balances Request. 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.

The following steps outline how to approve reported time and absence:

1. Navigation: **Home > Approvals.**
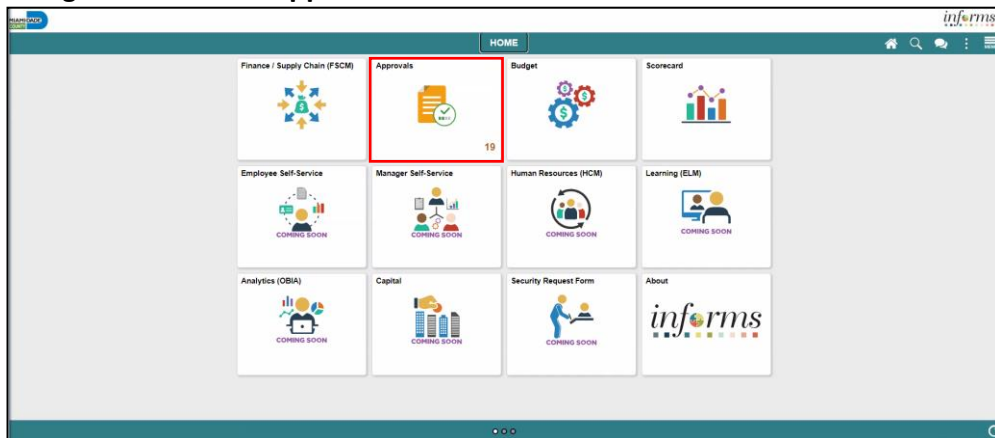


2. The list of Pending Approvals will be available via the **Pending Approvals** page.
3. Select **Time and Absence** pane to view the list of employees with pending Time and Absence approvals.
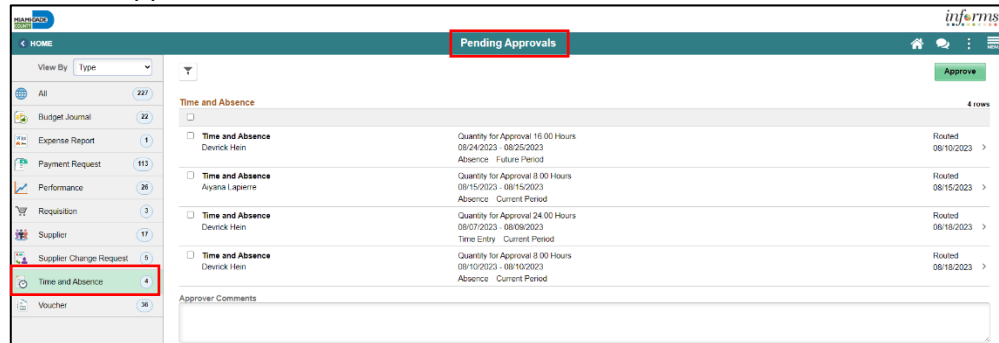
## Lesson 1: Approve Time and / or Absence

Lecture 1:

Approve Time and Absence

There are two ways that a manager can approve time or absence via the **Approvals** tile. A manager can approve an individual time or absence entry or mass approve. To mass approve, select the check box by the employee(s) or select the check box at the top row to select all. Select the **Approve** button once all selections are made. A pop-up window will appear requesting **Approver Comments**. Enter comments and select **Submit.**

**Note:** The indicator feature will distinguish between Time entries and Absence entries and the corresponding period and is filtered in the following order:

    1st Sort: By Period – Current, Prior and Future
    2nd Sort: By Type – Time, Absence
    3rd Sort: By Date Requested (Start Date) – Older date first
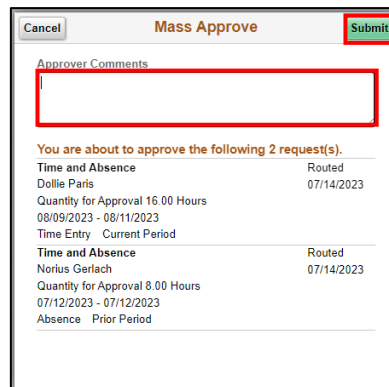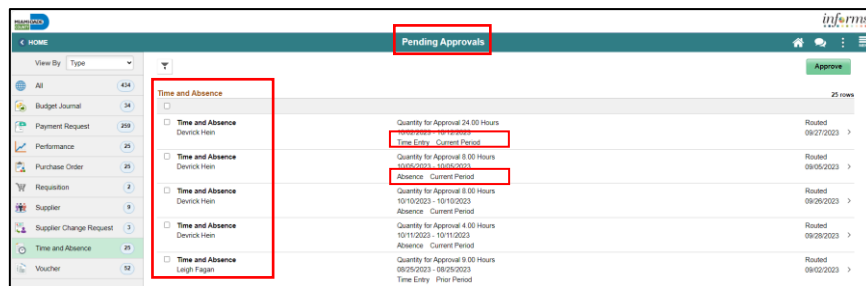




Also note, the Filters icon can be utilized to filter by **Type**, **Requester**, **From**, **Date Period,** and **Priority**:
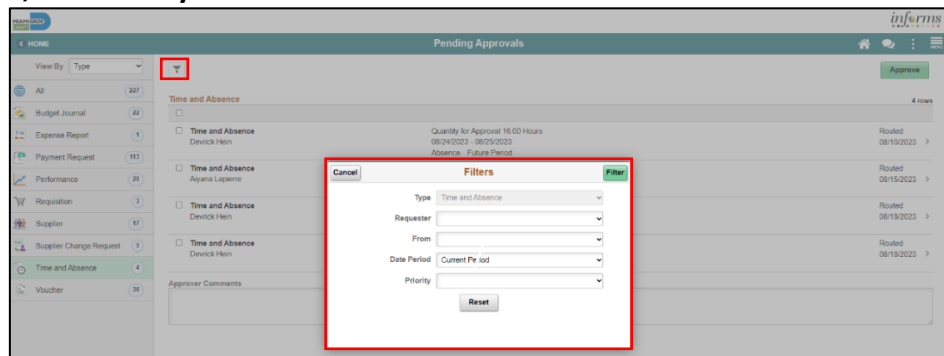
## Lesson 1: Approve Time and / or Absence

Lecture 1:

Approve Time and Absence

4. To drill down into the time or absence entry, select the row in the **Time Entry** or **Absence** details section which needs to be approved.
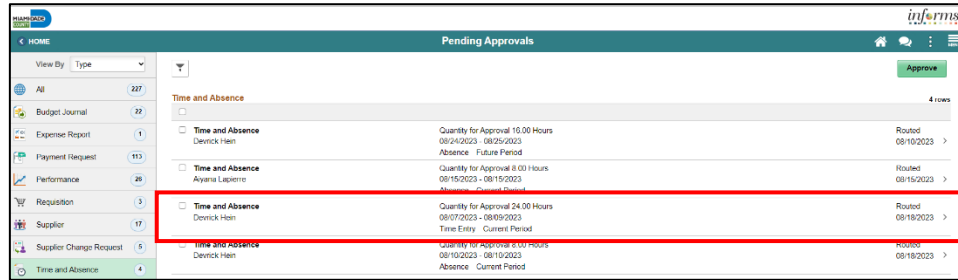


5. Select the individual time entry lines or all time entry lines. Select the **Approve** button to approve this employee's reported time or absence request.
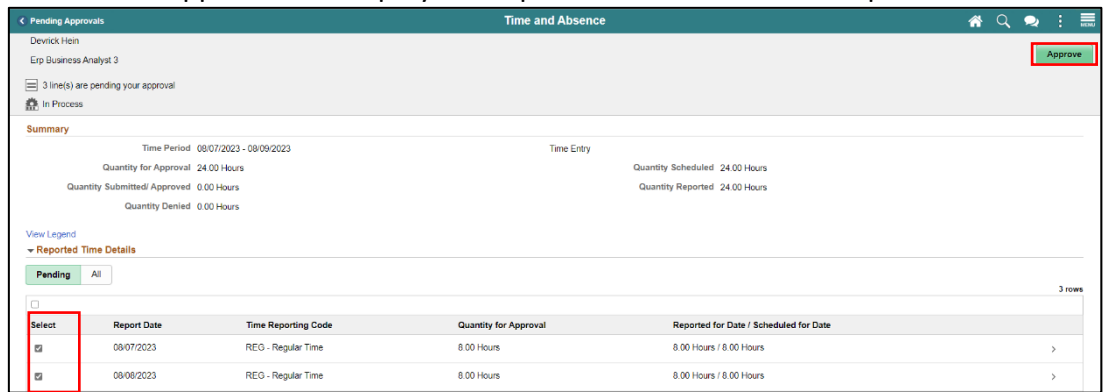


6. An **Approve** window will populate to ensure all comments are included prior to submitting the time reported.

7. Select **Submit.**
   **Note:** Once approved, a message will appear at the top of the screen to inform the approver that they have approved the request.
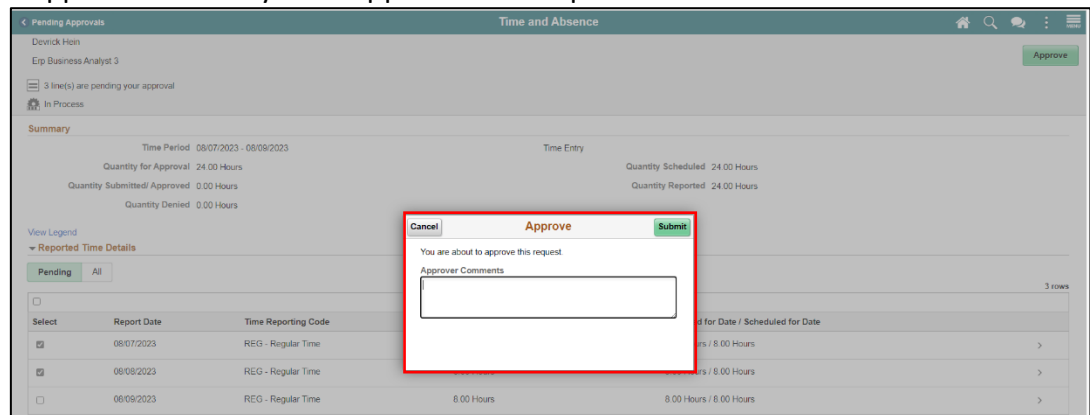
## Lesson 1: Approve Time and / or Absence

Lecture 1:

Approve Time and Absence

9. When approving an Absence Request, simply select the absence on the **Pending Approvals** page that you would like to approve. Select **Approve**, enter any applicable **Approver Comments** and **Submit**
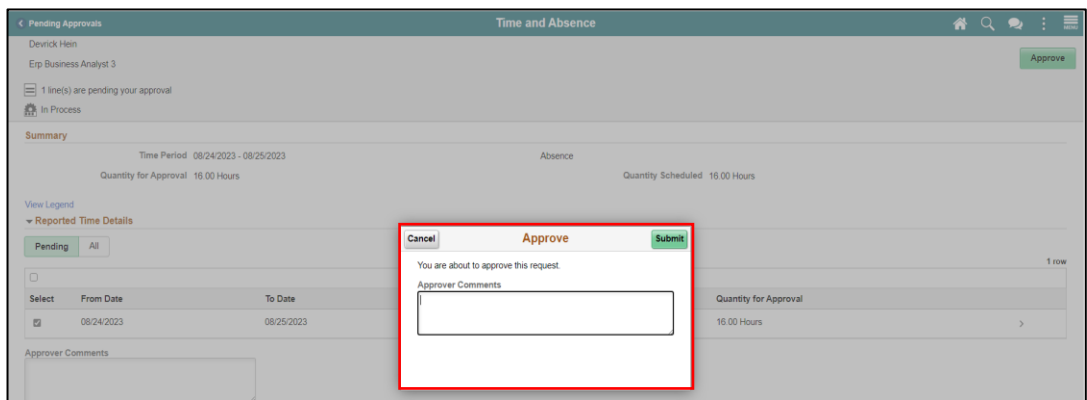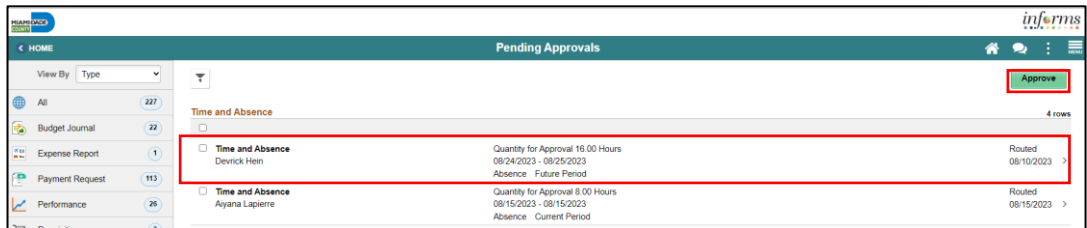
## Lesson 1: Training Activity 1

| | |
|---|---|
| Demonstration | The Instructor will now demonstrate how to execute the business process through the INFORMS training environment. |
| | |
| Scenario | An employee submits an absence request. Manager checks eligibility approves their time. |
| | |
| 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. Reported time requires approval.
   a) True
   b) False

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

3. A Manager needs to approve an absence request when they request an absence of behalf of the employee.
   a) True
   b) False

## Lesson 1: Lesson Summary

Lesson
Summary

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

- Approve an employee's time and / or absence
- Check an employee's absence eligibility
- Learn the difference between Payable Time and Reported Time
- Understand that absence balances displayed on the employee's absence balance pages are from prior closed pay periods
- Understand that absence balances displayed on the employee's absence balance pages do not include accruals earned or hours taken after pay period.

## Lesson 2: View Forecast Balance

Lecture 1: View Forecast Balance

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

- Forecast an employee's absence balance

## Lesson 2: View Forecast Balance

Key Terms

The following key terms are used in this lesson:

| 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 and absence takes 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 2: View Forecast Balance

Lecture 1: View Forecast Balance

**View Forecast Balance**

Managers can review Forecast Balance through the Manager Self Service tile. The Forecast Balance 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. Login to the INFORMS and select **Manager Self-Service** from the home landing page.
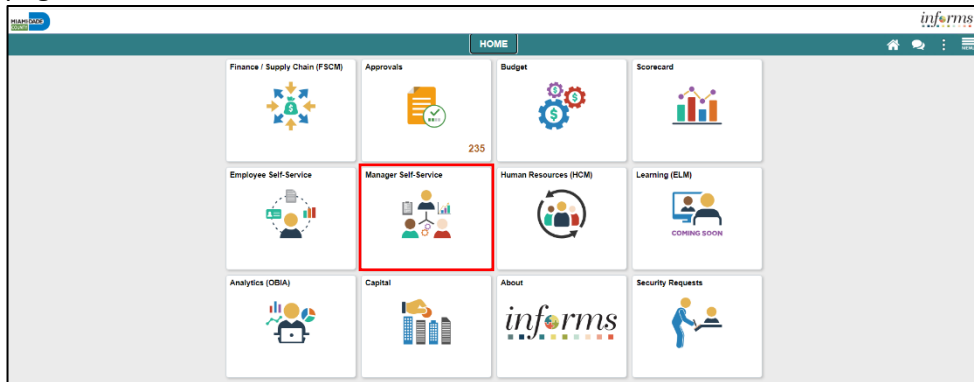


2. Select **Team Time**.
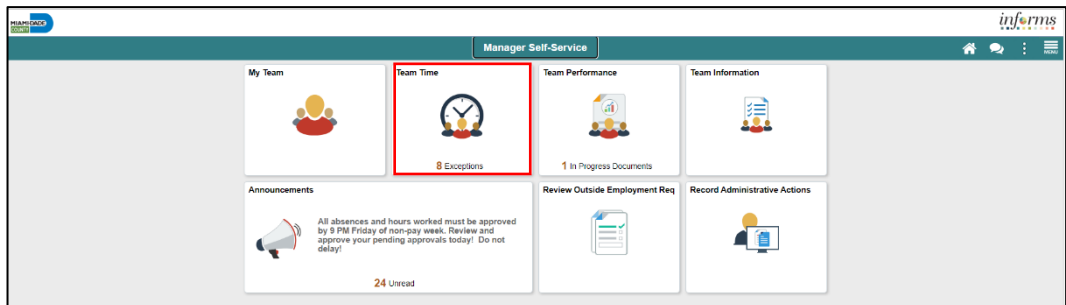
## Lesson 2: View Forecast Balance

Lecture 1: View Forecast Balance

3. Select **Absence Balances**.
4. Select the desired employee.
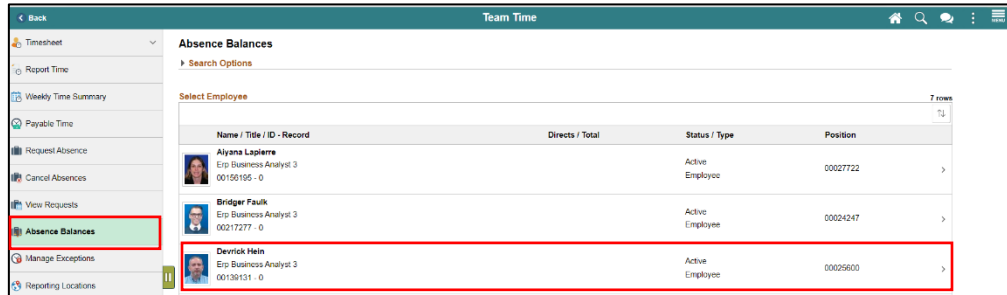


5. Scroll down and select **Forecast Balance**.
6. Select the date for which you want to forecast the balance in **As Of Date**.
7. Select the type of absence being forecasted in **Filter by Type**.
8. Select the type of absence in **Absence Name**.
9. Select the **Forecast Balance** button to display the **Forecast Details**.
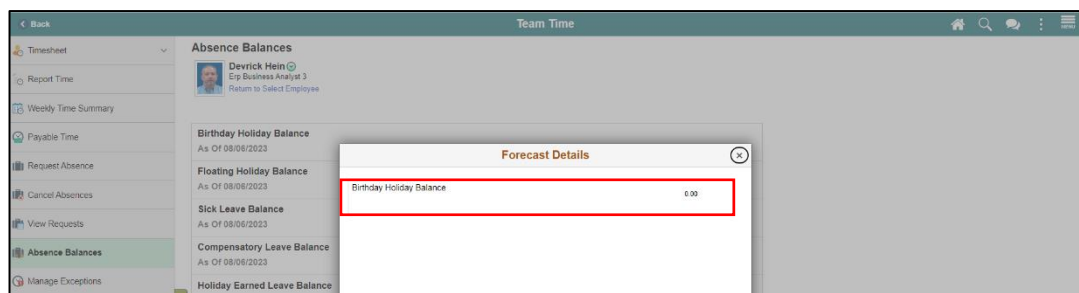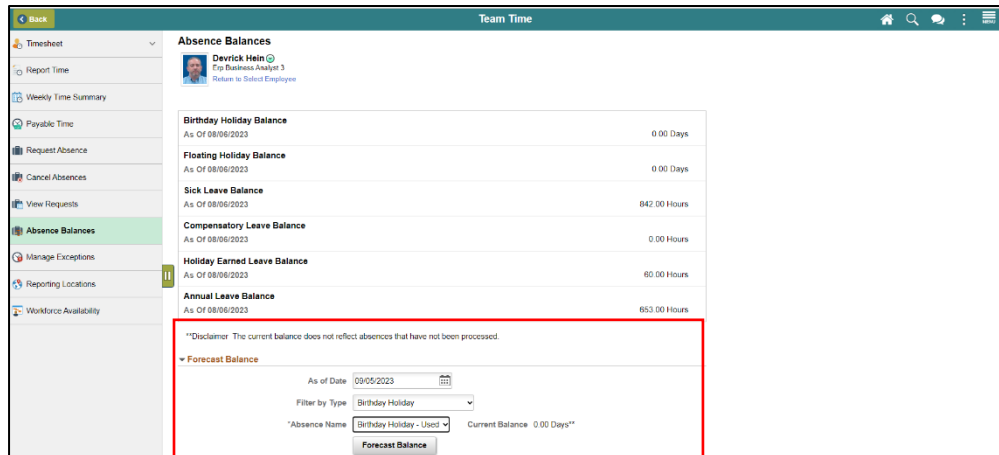
## Lesson 2: View Forecast Balance

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

Scenario

Employee submits absence request. Manager forecasts the employee's balance.

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 2: Training Exercise

Debrief

1. Reported time is accounted for in an employee's forecasted balance?
    a) True.
    b) False.

## Lesson 2: Lesson Summary

Lesson Summary

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

- Forecast an employee's absence balance

## Lesson 3: Manage Exceptions

Lesson 3:
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 3: Manage Exceptions

Lesson 3:
Introduction
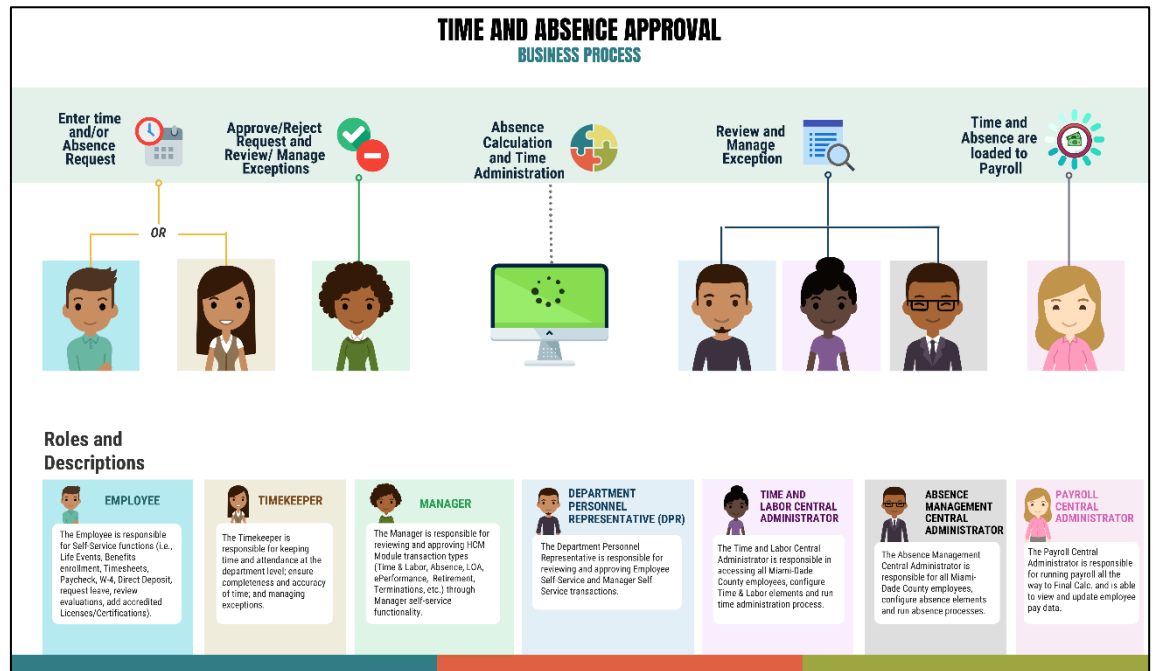
## Lesson 3: Manage Exceptions

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 *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. |

## Lesson 3: Manage Exceptions

Lecture 1: Overview of 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, Resolved.*

## Lesson 3: Manage Exceptions

Lecture 1:
Overview of
Exceptions

The following are different types of exceptions that can occur 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 3: Manage Exceptions

Lecture 2:
Manage
Exceptions

**Manage Exceptions**

A Manager 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 Manager will need to correct the time on the Timesheet and process the time again through the Time Administration process.

To resolve an exception, the Manager must go to the Manager Self-Service tile to review the exception. The following steps outline how to view, and resolve an exception:

1. Navigation: **Manager Self-Service > Team Time**

2. Select **Manage Exceptions** then select the employee. Use the two filter icons to filter results.
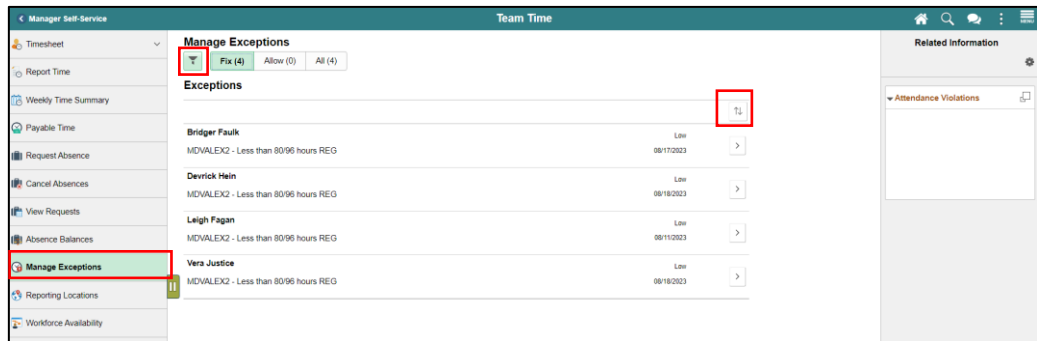


**Note:** the indicator to the right will indicate whether the exception is low, medium, or high. Although INFORMS will trigger a Low and Medium severity, the Manager can submit time. However, for High severity, based on the severity explanation, Managers are required to update the time sheet prior to submitting for approval. It is **<u>strongly</u>** encouraged to review each individual exception before submitting.
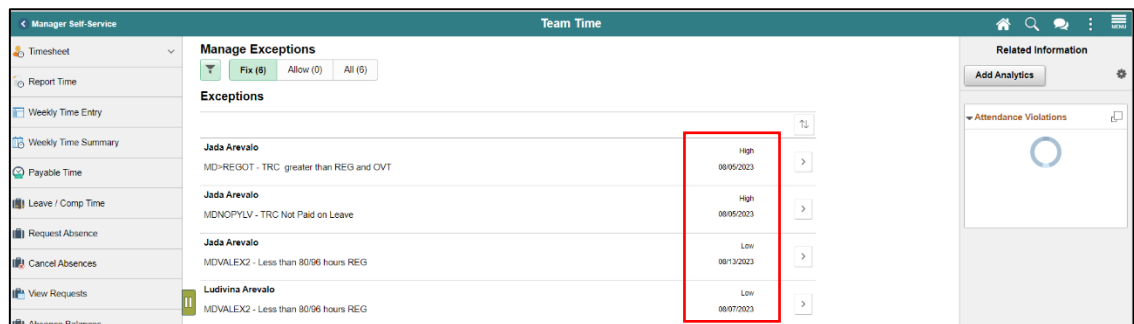
## Lesson 3: Manage Exceptions

**Lecture 2: Manage Exceptions**

3. In the **Reported Time Details** section and select the Reported Date with the exceptions.
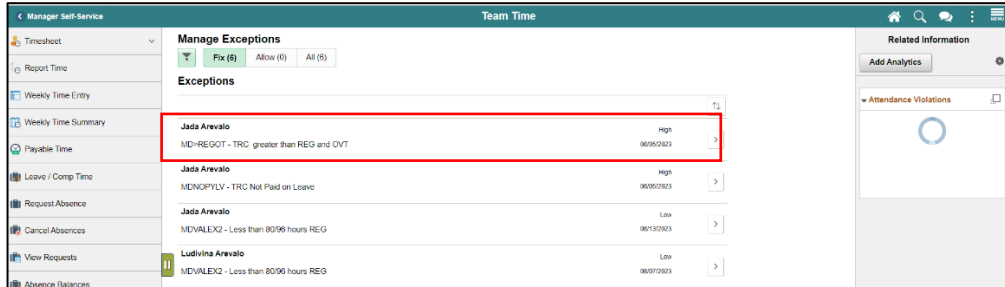


4. In the details page, select the exception-generating entry.
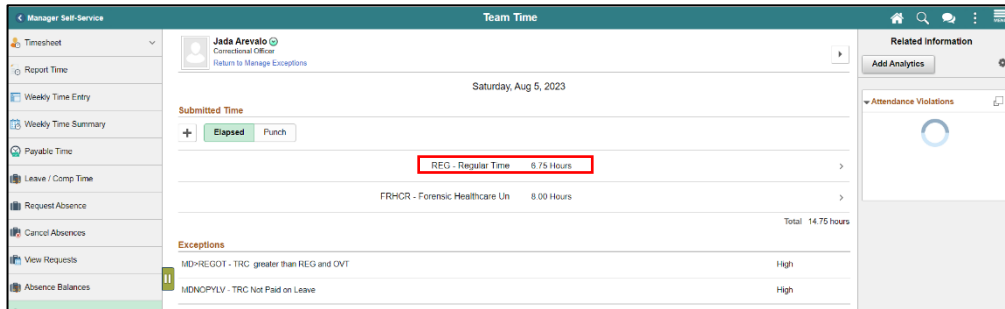


5. In the **Time Report** page, review the exception and make appropriate updates then select **Submit**. In this example, the correct hours quantity is inputted. However, the exception may have been generated due to an incorrect **Time Reporting Code** or **Taskgroup**.
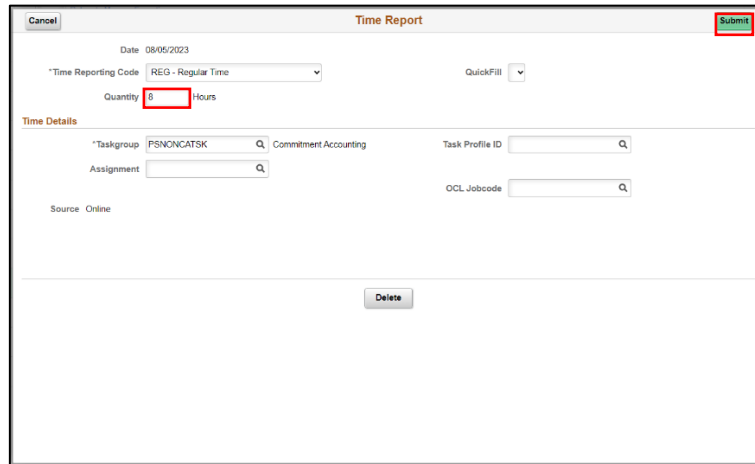


**Note:** All *High* severity exceptions need to be fixed on the employee's timesheet by the employee, Manager, or Department Personnel Representative (DPR) and resubmitted through the Time Administration process.

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

## Lesson 3: 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 their reported time is not translating to payable time on their timesheet. As the Manager, 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 3: Training Exercise**

Debrief

1.  Provide an example of a High Severity Exception.

_____

_____

_____

_____

2.  How are High Severity Exceptions fixed in INFORMS?

_____

_____

_____

_____

## Lesson 3: Lesson Summary

Objectives
Achieved

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

- Understand the difference between High, Medium and Low Severity Exceptions
- View and resolve Time Reporting Exceptions

## Lesson 4: Enter Time on Behalf of Employee

Lesson 4:
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 4: Enter Time on Behalf of Employee

Lesson 4:
Introduction
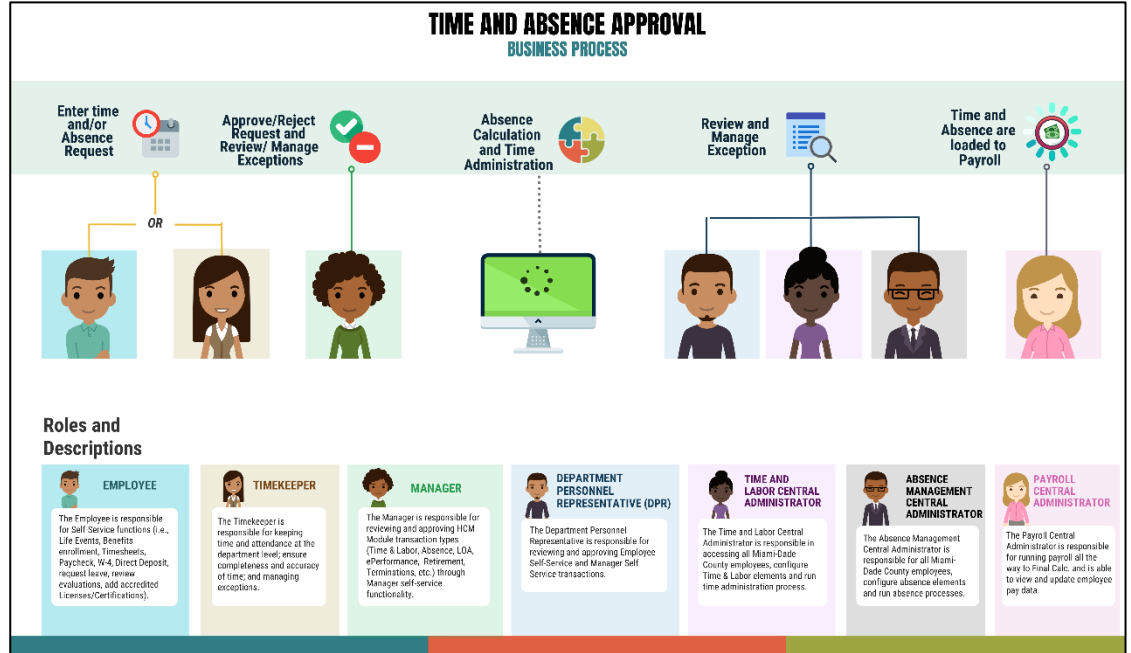
## Lesson 4: Enter Time on Behalf of Employee

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 4: 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, their Manager can enter the employee's time on their behalf.

The following topics will be discussed in this course:

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

## Lesson 4: 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:
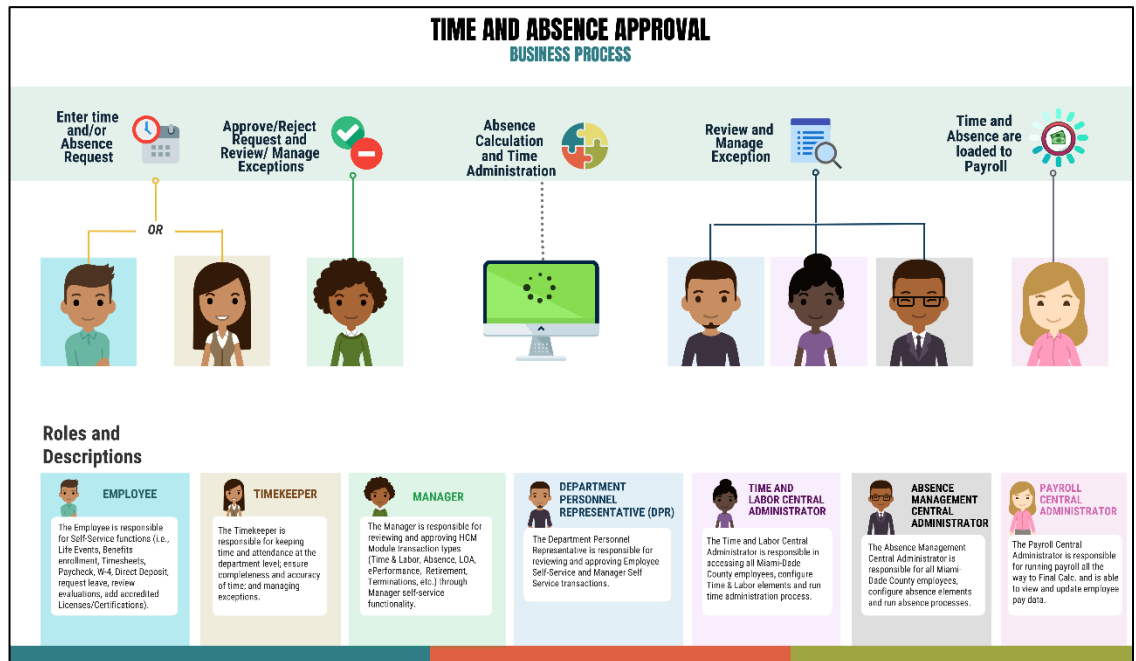
## Lesson 4: Enter Time on behalf of Employee

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 4: 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 Manager can submit a timesheet on behalf of the employee if the employee is unable to report it.

Navigation: **Manager Self Service > Team Time > Enter Time**

1. On the **Enter Time: Timesheet Summary** page, the Manager or Department Personnel Representative (DPR) can search for the employee that time must be submitted for.
   **Note**: As a Manager or DPR, you may use the **Report Time** selection from the navigation to enter time for the current day.

2. Select **Get Employees** to see all employees or user the **Filter** and enter any of the pertinent search selection criteria, then Select **Done.**

   **Note**: If a Manager is using this functionality and Selects **Get Employees**, all employees the Manager manages, based on the **Time Reporter Group,** will be displayed. If a Department Personnel Representative (DPR) Selects **Get Employees** with no search criteria, all employees within their same security group will be listed. It is recommended that users enter at least a **Department, Empl ID,** or **Business Unit, Taskgroup** to narrow the search results.
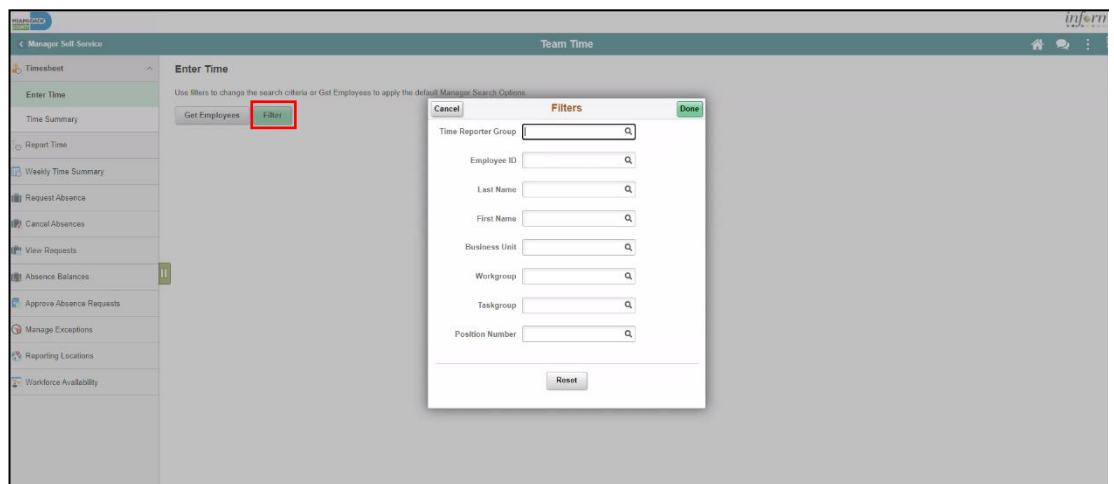
## Lesson 4: Enter Time on behalf of Employee

Lecture 2: Enter Time on behalf of Employee

3. Review the search results under **Enter Time** page. Select on the employee to open the employee's timesheet.
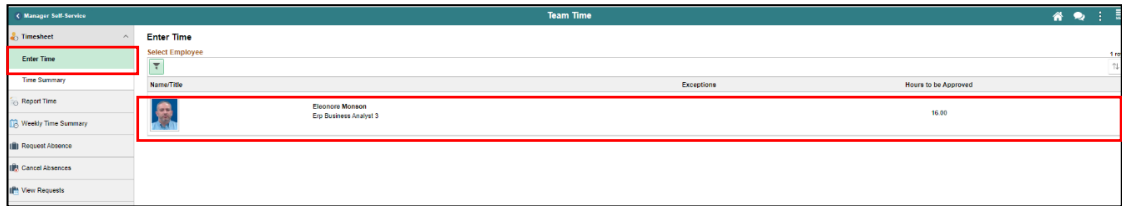


4. Review the employee's timesheet for the pay period or weekly by selecting the **View By** dropdown. You can select the pay period dates by selecting the left and right arrows below, or simply select the calendar icon to select a specific date. Use the Slider to scroll through the two-week pay period.
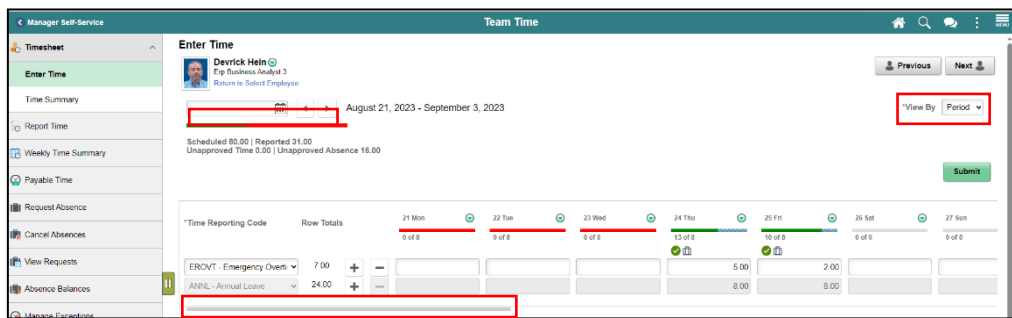


**Note:** Select **Action Arrow** icon next to the date to view the related actions including Add / View Comments.
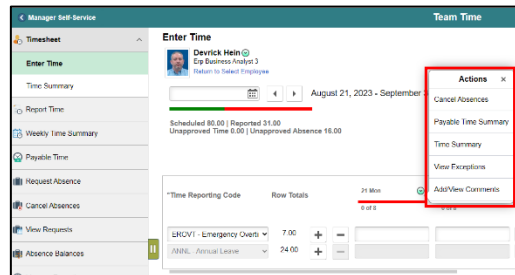


5. Once you have reached the correct pay period or weekly timesheet, enter the hours.

   **Note:** Although the **Next Time Period** link is available, the Department Personnel Representative (DPR) cannot enter future time on behalf of the employee.

6. For each line of time entered as Elapsed Timesheet, select the **Time Reporting Code** for the time that is being submitted if it is not the regular time code. The **Time Reporting Code** options will vary based on the employee's job and tasks.

## Lesson 4: Enter Time on behalf of Employee

Lecture 2: Enter
Time on behalf
of Employee

7. Add a line by selecting the (+) button if necessary. Once all time and time reporting codes are entered, select **Submit.** In the screenshot below **Regular Time** is used. Once submitted, you will receive a message at the top of the screen that the time has been submitted.
**Note**: **Scheduled**, **Reported**, and **Unapproved Time** are displayed as well as **Unapproved Absence**.
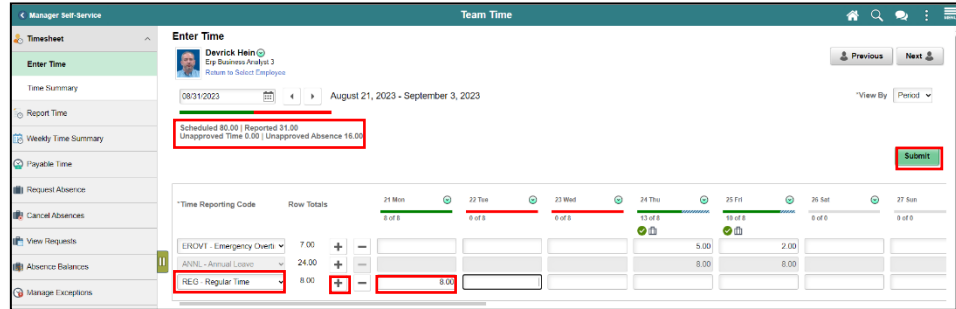


**Note:** Once the Manager submits the time on behalf of the employee, the reported time is automatically approved.

8. In the **Manager Approvals** section, the **Reported Status, Date**, **Reported Status, Total Hours, Time Reporting Code (TRC), and TRC Description** will be displayed:
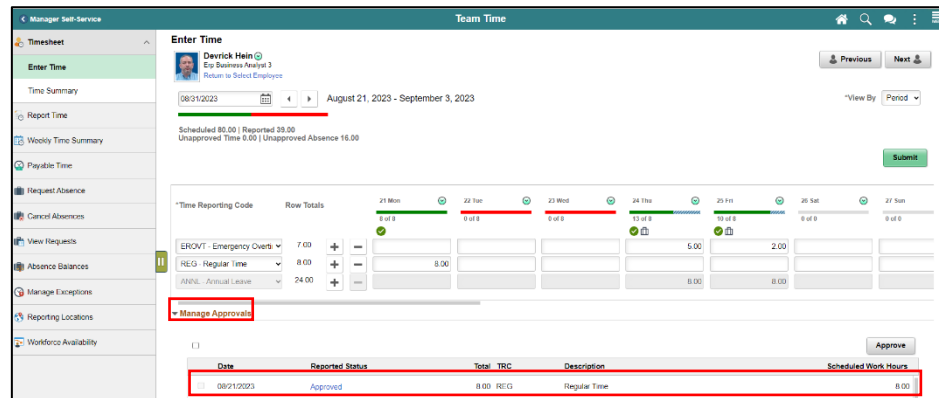


**Note**: You may also mass approve Time / Absence in the Manager Approvals section as well.
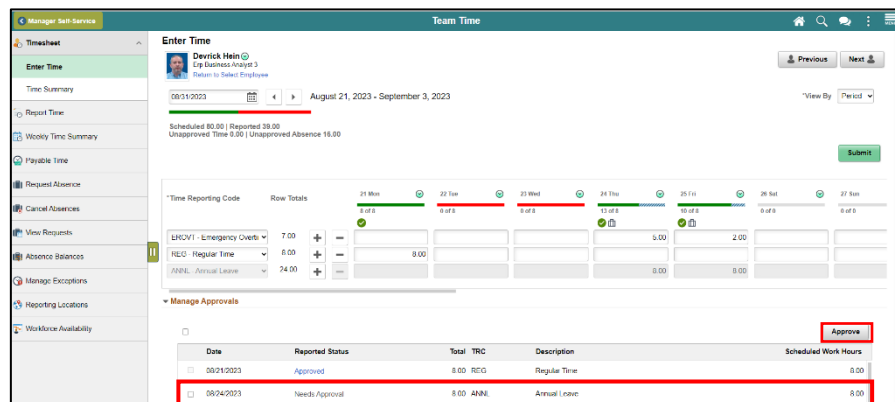
## Lesson 4: Enter Time on behalf of Employee

Lecture 2: Enter Time on behalf of Employee

**Note:** For each row with an Out of Class (OCL) time reporting code:

- Scroll to the right of the timesheet and select the corresponding **OCL Jobcode**.
- Your default **Taskgroup** will auto-populate. If applicable, enter the appropriate **Task Profile ID** as directed by your department. Each different code will require its own row. Select the Lookup icon to select a different task profile ID.
- Select the **Submit** button.
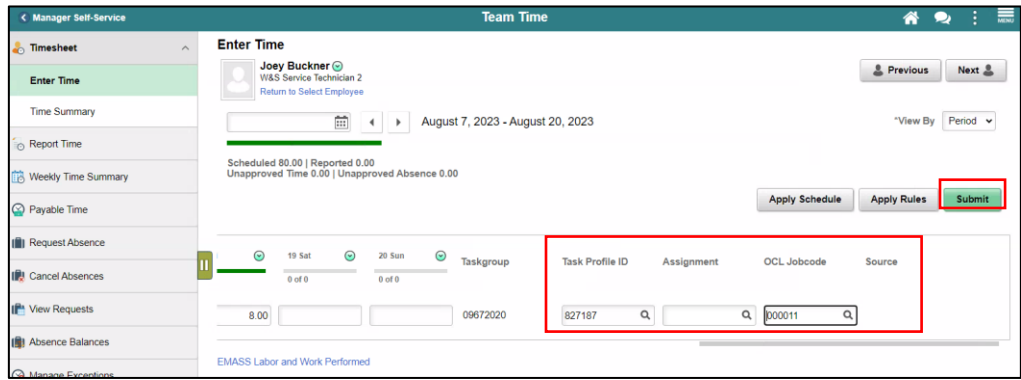


**Note:** Kaba clock employees will have limited access to the timesheet page. The timesheet will be disabled as shown in the screenshot below, however, these employees will have the ability to request and cancel an absence.
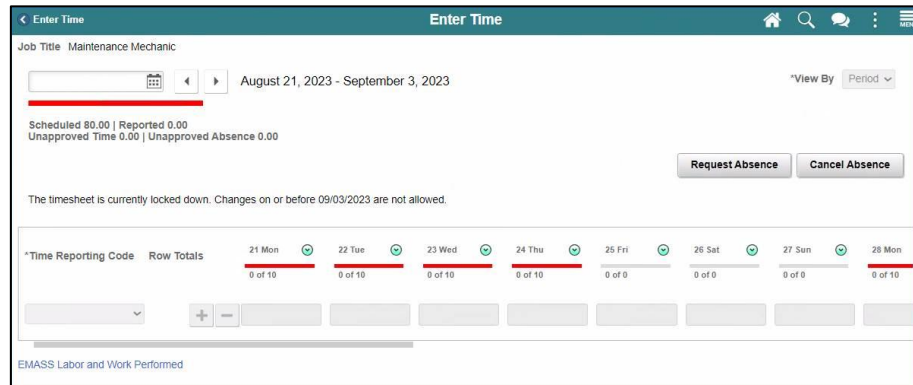


### Timesheet Legend
Refer to the below legend for the meaning of the Timesheet icons.

| | | | |
|---|---|---|---|
| ✅ | Approved | 🟩 | Reported |
| 👥 | Pending Approvals | 🟥 | Reported Under Schedule |
| ✋ | Pushed Back | ▨ | Reported Over Schedule |
| ⚠ | Exception | ⬜ | OFF Day |
| 🏛 | Absence | 🗨 | Comment |

## 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 is unable to submit their timesheet before time is due. As the Manager, 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 4: Training Exercise

Debrief

1. When does reported time change to payable time?

_____

_____

_____

_____

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

_____

_____

_____

_____

## **Lesson 4: Lesson Summary**

### Lesson Summary

Verify that participants understood the information in this lesson before you move on to the next one.

Discuss each learning objective and explain how to accomplish each one.

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

Instructor Notes

## **Lesson 4: 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 5: Submit Absence on Behalf of Employee

Lesson 5:
Overview

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

- Enter an Absence on Behalf of an Employee using Absence Management

## Lesson 5: Submit Absence on Behalf of Employee

Lesson 5:
Introduction
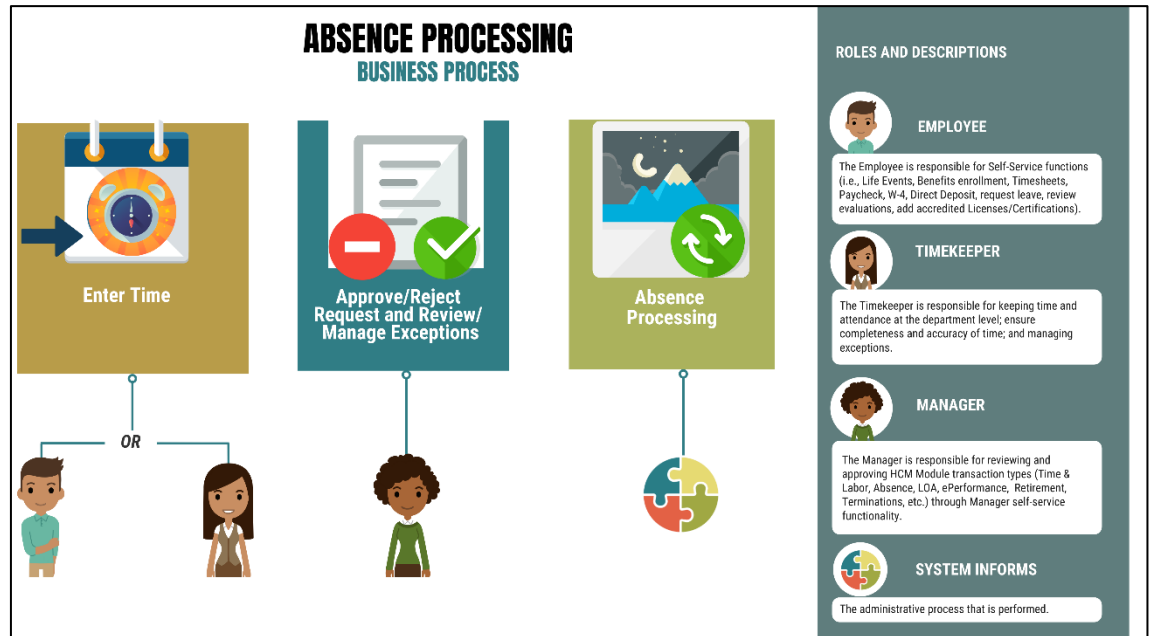
## **Lesson 5: Submit Absence on Behalf of Employee**

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 5: Submit Absence on Behalf of an Employee

Lecture 1:
Submit Absence
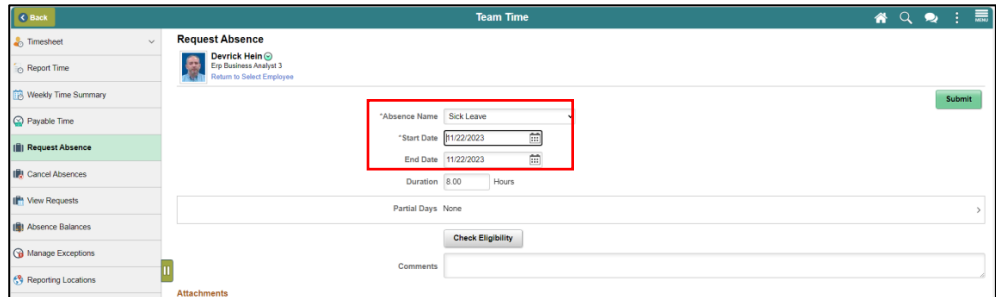on Behalf of an
Employee

**Submit Absence on Behalf of an Employee**

The following steps outline how the Manager can submit an absence request on behalf of the employee if the employee is unable to report it.

1.  Navigation: **Homepage > Manager Self-Service > Team Time > Request Absence**
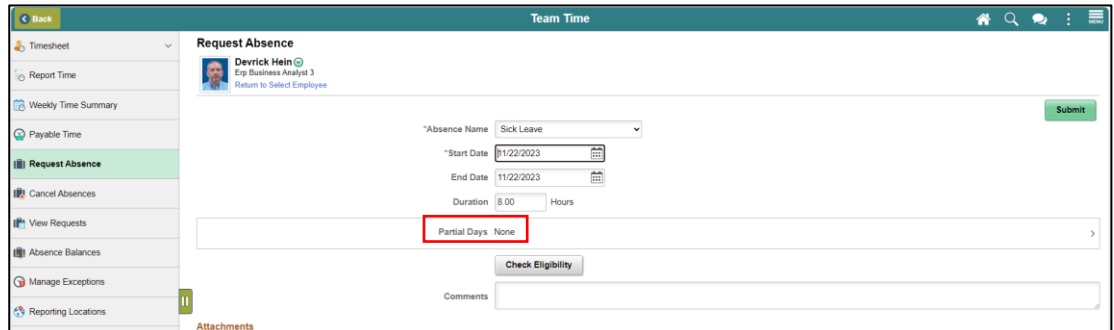
2.  Select an employee to submit absence on behalf of.
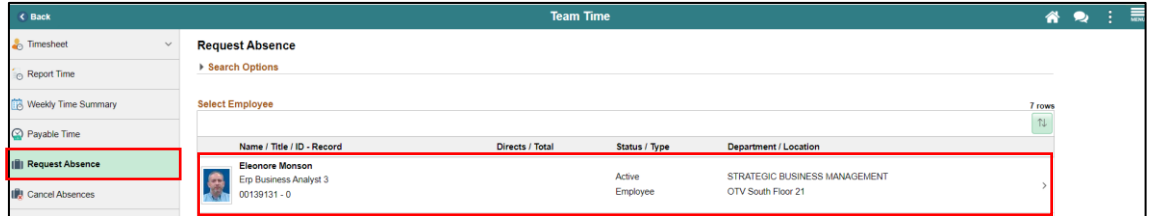


3.  Populate the absence request form.
    - Absence Type
    - Start Date
    - End Date
    - Duration (in Hours)



**Note:** Different absence types in the Absence Name field will require additional information. For Annual Leave, employees can request partial days.

4.  Select the **Check Eligibility** box to check employee's available balance and eligibility of the selected absence.

    **Note:** The manager must always select **Check Eligibility** to submit the absence request.
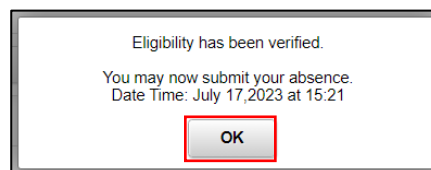
## Lesson 5: Submit Absence on Behalf of an Employee

**Lecture 1: Submit Absence on Behalf of an Employee**

5.  Review the absence details, enter any pertinent comments, and Select **Submit**.



6.  Select **Yes** once prompted.



7.  As a manager, the Status for the absence request is **Approved** once the request is successfully submitted.

## Lesson 5: Submit Absence on Behalf of an Employee

Lecture 2:
Submit Partial
Absence on
Behalf of an
Employee

**Submit a Partial Absence on Behalf of an Employee**

The following steps outline how the Manager can submit a partial absence request on behalf of the employee if the employee is unable to request it.
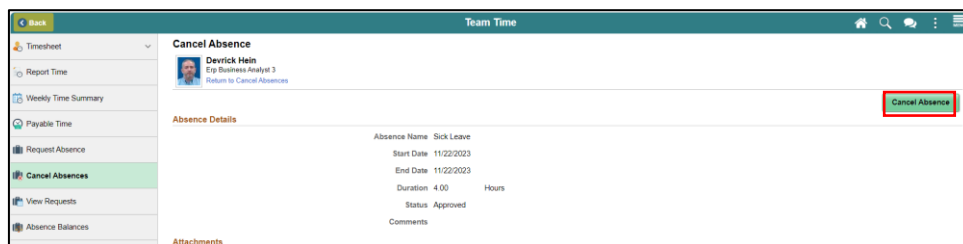
1. Navigation: **Homepage > Manager Self-Service > Team Time > Request Absence**

2. Select an employee to submit absence on behalf of.
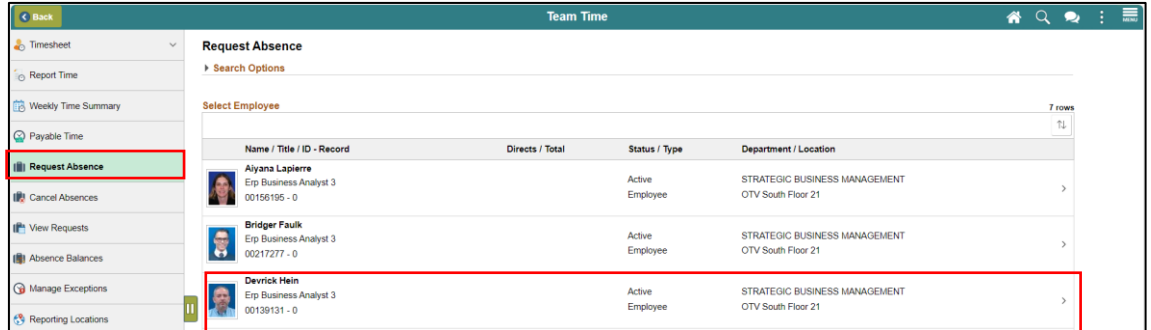


3. Populate the absence request form.
   - Absence Type
   - Start Date
   - End Date



4. Select **Partial Days**.

## Lesson 5: Submit Absence on Behalf of an Employee

Lecture 2:
Submit Partial
Absence on
Behalf of an
Employee

5.  In the **Partial Days** dropdown, select the partial days type. In this example, **All Days** is selected. Enter the desired duration and select **Done**.



6.  Select **Check Eligibility** and then **Submit** once eligibility has been verified.



7.  Select **Yes** once prompted.



8.  As a manager, the Status for the absence request is **Approved** once the request is successfully submitted.

## Lesson 5: Submit Absence on Behalf of an Employee

Lecture 3:
Cancel Absence
on Behalf of an
Employee

**Cancel Absence on Behalf of an Employee**

The following steps outline how the Manager can cancel an absence request on behalf of the employee if the employee is unable to cancel it.

1. Navigation: **Homepage > Manager Self-Service > Team Time > Cancel Absence**

2. Select an employee whose absence you wish to cancel.
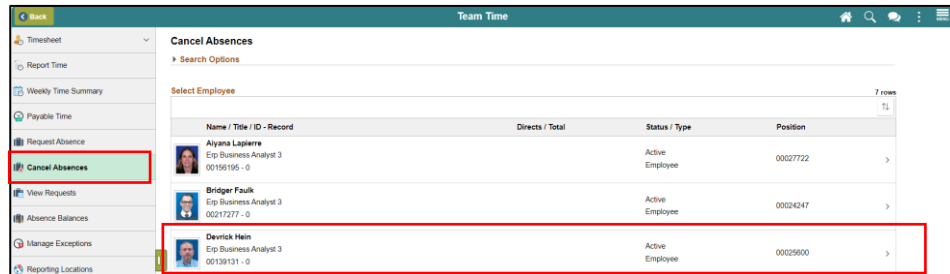


3. Select the absence request.
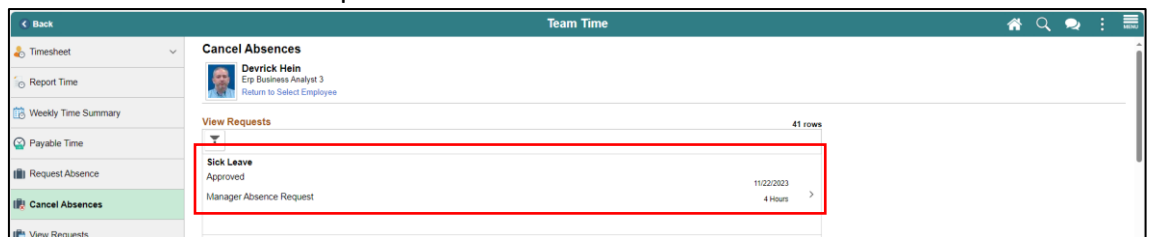


4. Select the **Cancel Absence** button**.**



5. Select **Yes** when prompted.
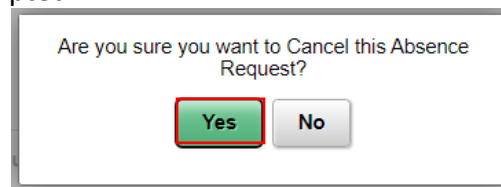
| Lesson 5: Training Activity 1 | |
|---|---|
| Demonstration | The Instructor will now demonstrate how to execute the business process through the INFORMS training environment. |
| | |
| Scenario | An employee is out of the office due to illness and is unable to enter the absence event himself. He took 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 Manager, 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 5: 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 Manager has to approve the Absence requested on behalf of an employee.
   a) True
   b) False

## Lesson 5: 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

## Lesson 6: 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 6: Manage Work Schedule

Lesson 6:
Introduction

### MANAGE WORK SCHEDULE
#### BUSINESS PROCESS



Manage Personal
Schedules

Reviews
Schedules

Time Administration
Runs / Exceptions are
cleared

**DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)**

The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

**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 6: 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 6: 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 6: 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 Manager has the ability to create a personal schedule.

*End-to-end Process*

Below is the flow for assigning and maintaining schedules:



The **Department Personnel Representative (DPR)** administers time → A personal schedule is assigned to the employee → The employee is able to view the schedule → If applicable the employee and managers schedule is available for adjustments or overrides
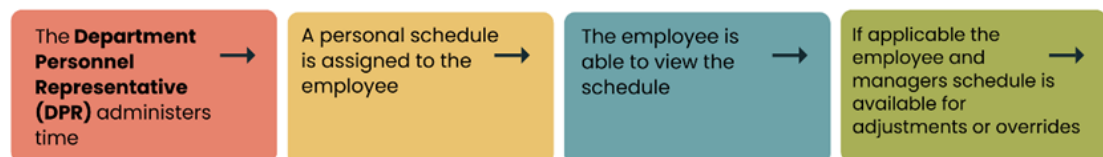
Schedules need to be assigned or changed for employees in the following scenarios:

- 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 6: 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:

NavBar Navigation: **Human Resources (HCM)** > **Time and Labor** > **Enroll Time Reporters** > **Assign Work Schedule.**
Or
**Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule**
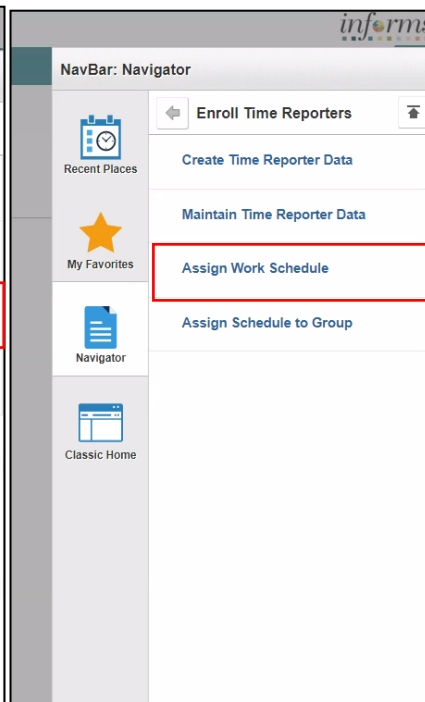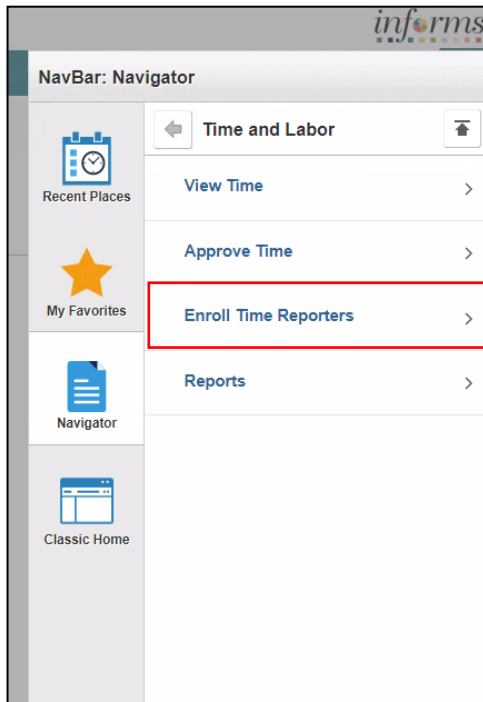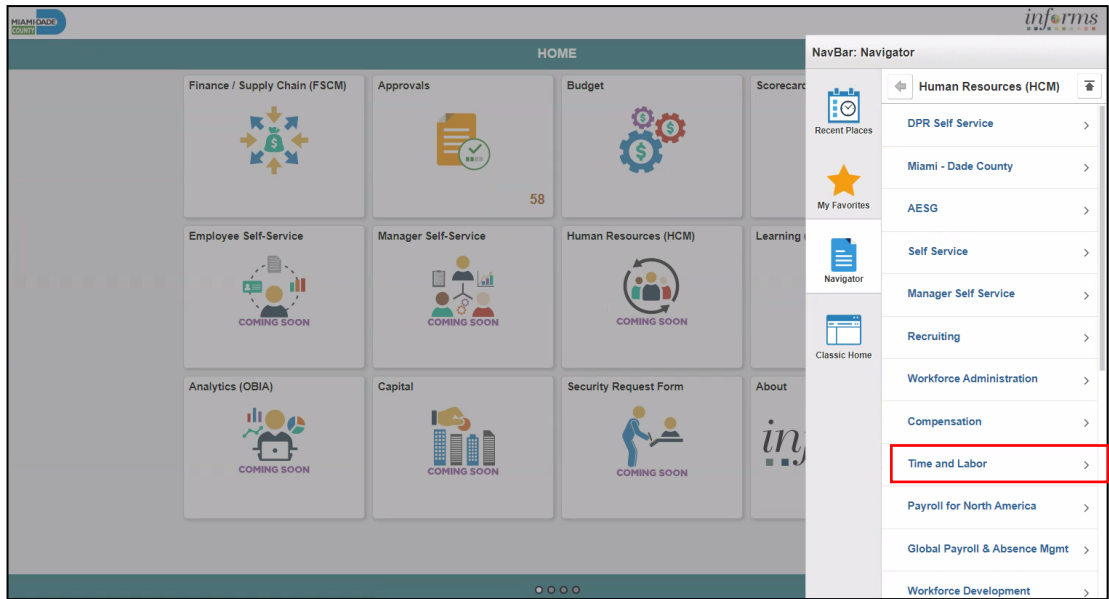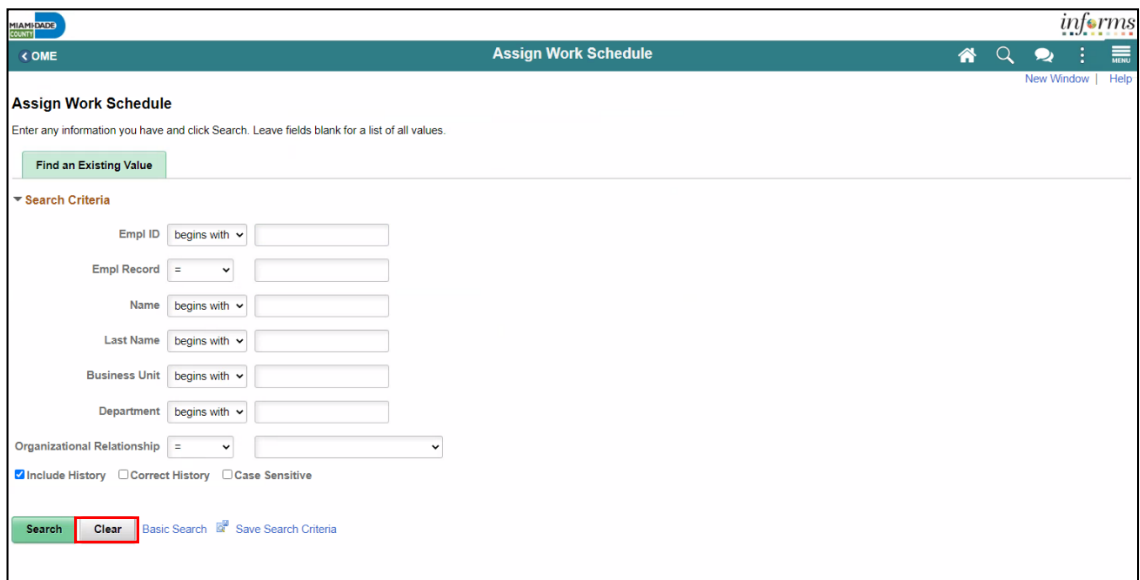
## Lesson 6: Manage Work Schedule

Lecture 2: Personal Schedule

**Assigning a Personal Schedule**

1. 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**

2. 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.

## Lesson 6: Manage Work Schedule

Lecture 2:
Personal
Schedule

**Assigning a Personal Schedule**

3. 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.
4. Find the correct employee and Select on the **Empl ID** to open the **Assign Work Schedule** page for that employee.



5. 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.



6. 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.**

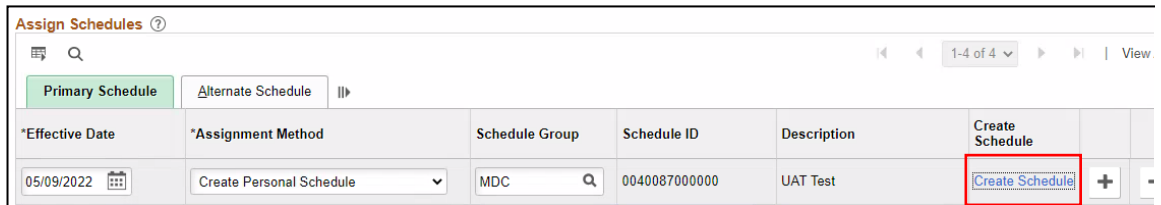## Lesson 6: Manage Work Schedule

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.

7.  Select **Create Schedule.**

Note: **Effective Date** should be the next pay period begin date.



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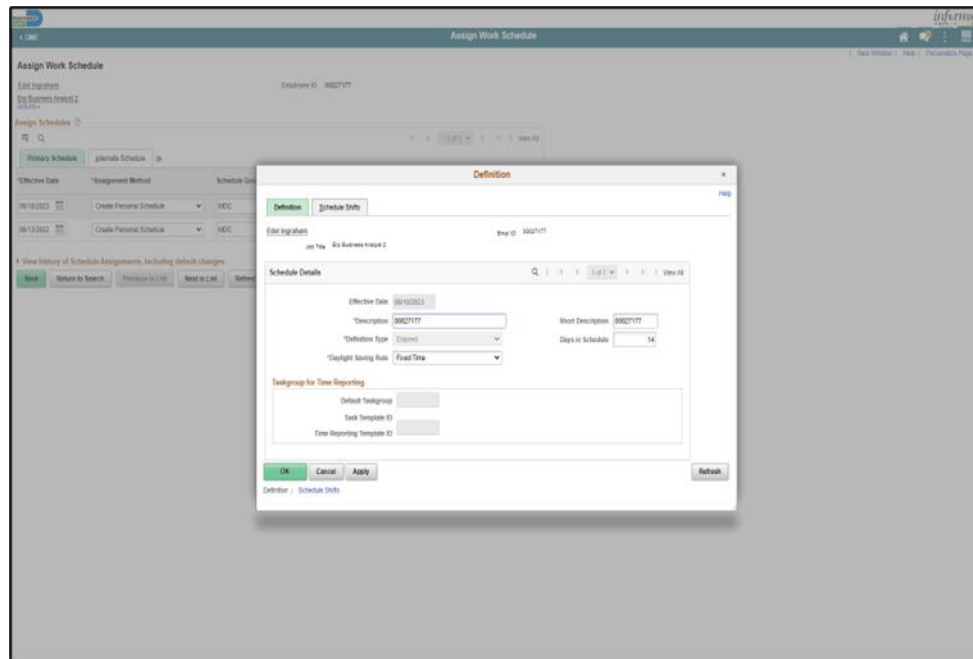


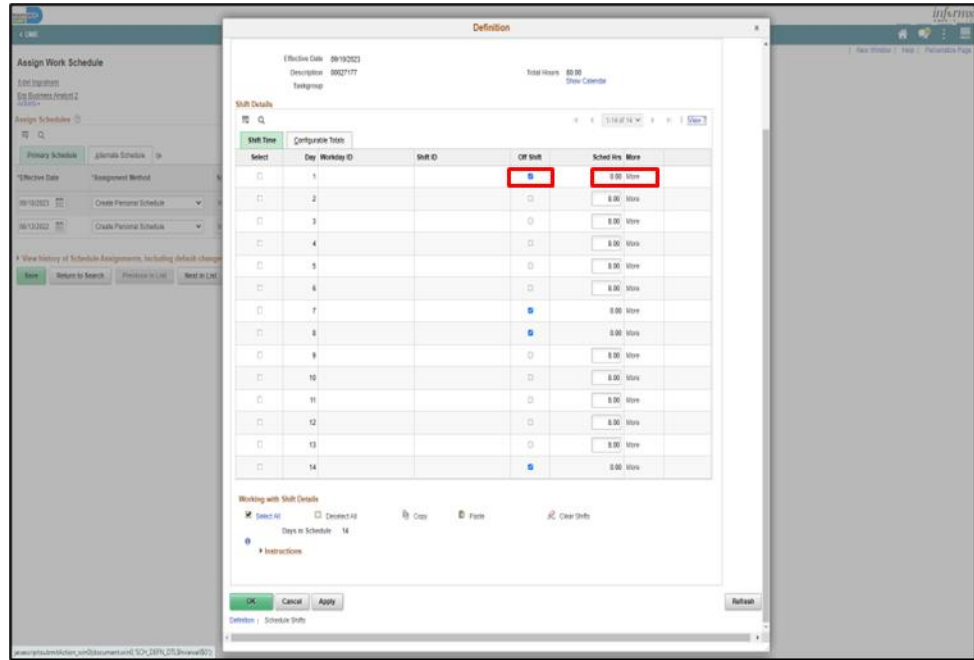The following are required fields (*) that must be updated prior to selecting **OK**:

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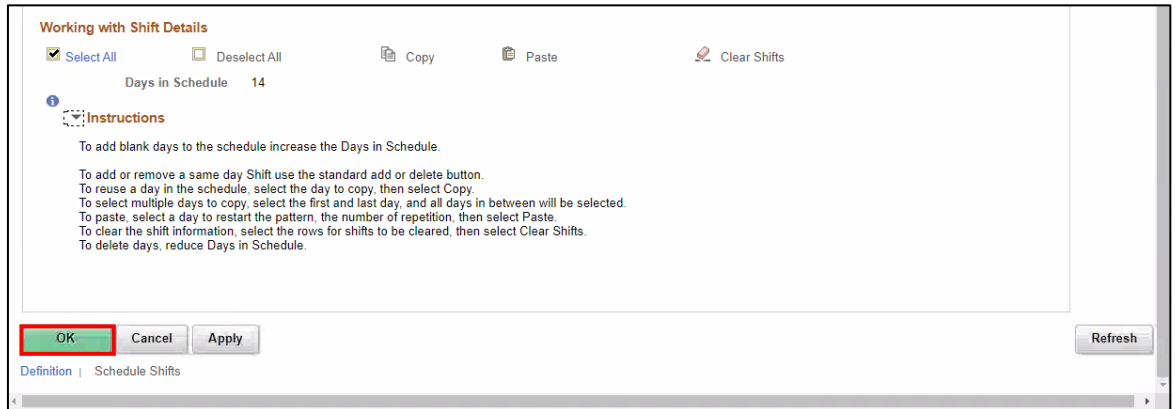- Days in Schedule (14)

## Lesson 6: Manage Work Schedule

Lecture 2:
Personal
Schedule

**Assigning a Personal Schedule**

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



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

## Lesson 6: Manage Work Schedule

**Lecture 2: Personal Schedule**

### Assigning a Personal Schedule

11. 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.



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

12. 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.
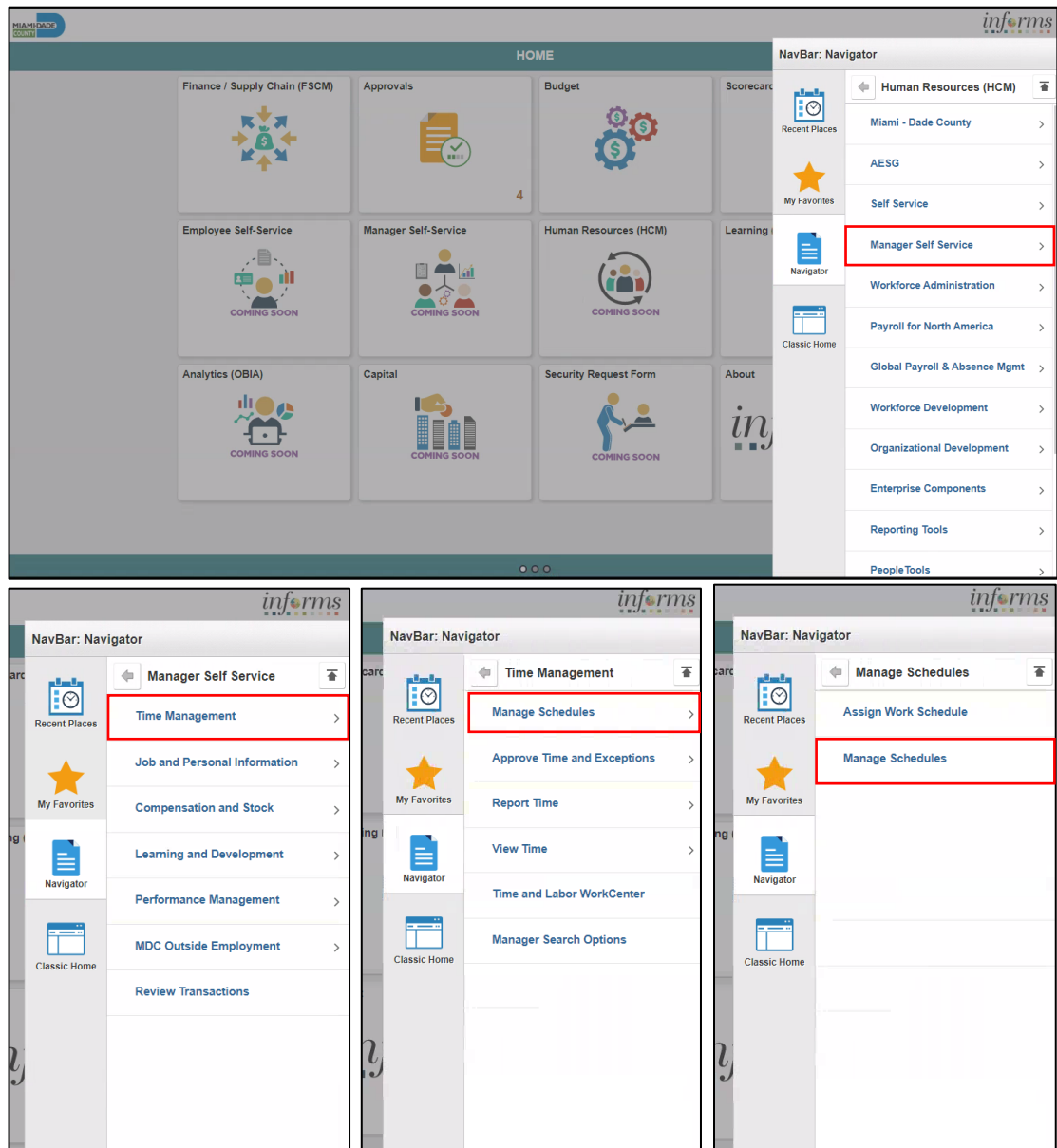
## Lesson 6: Manage Work Schedule

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 6: 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.



   - 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.

## Lesson 6: 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.**



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. <u>Do not</u> 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 6: 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 6: 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 6: 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 course. You now should be able to:

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

**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 Reported Time)
- Approve Time (Deny Reported Time)
- Approve Absence (Approve Absence)
- Approve Absence (Deny Absence)
- Approve Absence (Push Back Absence)
- Approve Absence (Approve Absence Request and Forecast Balance)
- Manage Time Exceptions
- Enter Time on Behalf of Employee
- Submit Absence on Behalf of Employee
- Manage Work Schedule (Assigning a Personal Schedule)
- Manage Work Schedule (Replace Schedules)

## Reference Materials (Cont.)

Reference
Materials

Job Aids:

- Time and Leave – New Task Profile Creation
- Time and Leave – Charging Time in Task Profile
- How to Create a Schedule Job Aid

For additional Information:

- www.miamidade.gov/informs

## Glossary

Key Terms

The following key terms are used in this course:

| Term | Definition |
|---|---|
| Delegation Proxy | Delegation proxy is the process used to assign a backup Manager for time approval responsibilities. |
| Entitlement | The amount of paid time off an employee is entitled to take for an Absence Take. |
| Entitlement Balance | The amount of unused entitlement. |
| Finalize Absences | Finalize absence is the process of closing absences for the current payroll period. |
| Payable Time | Payable time is time after it has been processed, and the rules have been applied to create differentials, premiums and overtime. A Manager approves payable time. |
| Reported Time | Reported time is the time that is entered on a timesheet. |
| Speed Type | A speed type is a shortcut to look up or enter valid combo codes. |
| Timesheet Page | A timesheet page enables a Manager to work with an employee's reported time in more detail. |
| Units | The period of time in which entitlement, take, adjustments and balances are measured. Typically in hours or partial hours. |
| Delegation Proxy | Delegation proxy is the process used to assign a backup Manager for time approval responsibilities. |

## Glossary

Key Terms

The following key terms are used in this course:

| Term | Definition |
| --- | --- |
| Absence Event | The period for which an employee is absent for the same reason. |
| Absence Take | The element which represents the reason for the Absence Event. |
| Entitlement | The amount of paid time off an employee is entitled to take for an Absence Take. |
| Entitlement Balance | The amount of unused entitlement. |
| 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. |