Course ID: MSS 204
Course: Time Management

Ground Rules

Be on time

Turn off your cell phones when in class

Participate actively in class; refrain from email and internet use

Attendance

Take breaks as needed

Feel free to ask questions

Course Overview

Course Description	This course provides a comprehensive review of the Time Management processes.
	
	This course consists of the following modules:
	• Module 1: Course Introduction
	• Module 2: Time Management
	  ○ Approve Time / Deny Time and Absence
	  ○ View Forecast Balance
	  ○ Manage Exceptions
	  ○ Enter Time on Behalf of Employee
	  ○ Submit Absence on Behalf of Employee
	  ○ Manage Work Schedules
	• Module 3: Course Summary

Training Audiences	• Manager
Prerequisites	• ERP 101 - Overview of ERP • ERP 102 - INFORMS Navigation and Online Help

Course Overview, Continued

Other Related Courses	• MSS 205 - Manager Self Service - ePerformance Management (Employee Performance Evaluation) • MSS 206 - Manager Self Service - Updating Team Information
Estimated Duration	• Day 1 (6 Hours) • Day 2 (6 Hours) Total duration: 12 Hours

Module 1: Course Introduction

Module 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

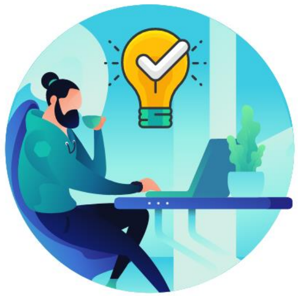
Course Administration and Logistics

To receive credit for completing this course, Users must record your attendance at the beginning, and end of class

Please turn off your cell phones and refrain from checking email and the Internet while in class

Actively participate in class

Take Breaks at scheduled times



Ask questions; this is your time to learn

Be back from Breaks on time

Learning Objectives

- Approve Time
- View Forecast Balance
- Manage Exceptions
- Enter Time on Behalf of Employee
- Submit Absence on Behalf of Employee
- Manage Work Schedules

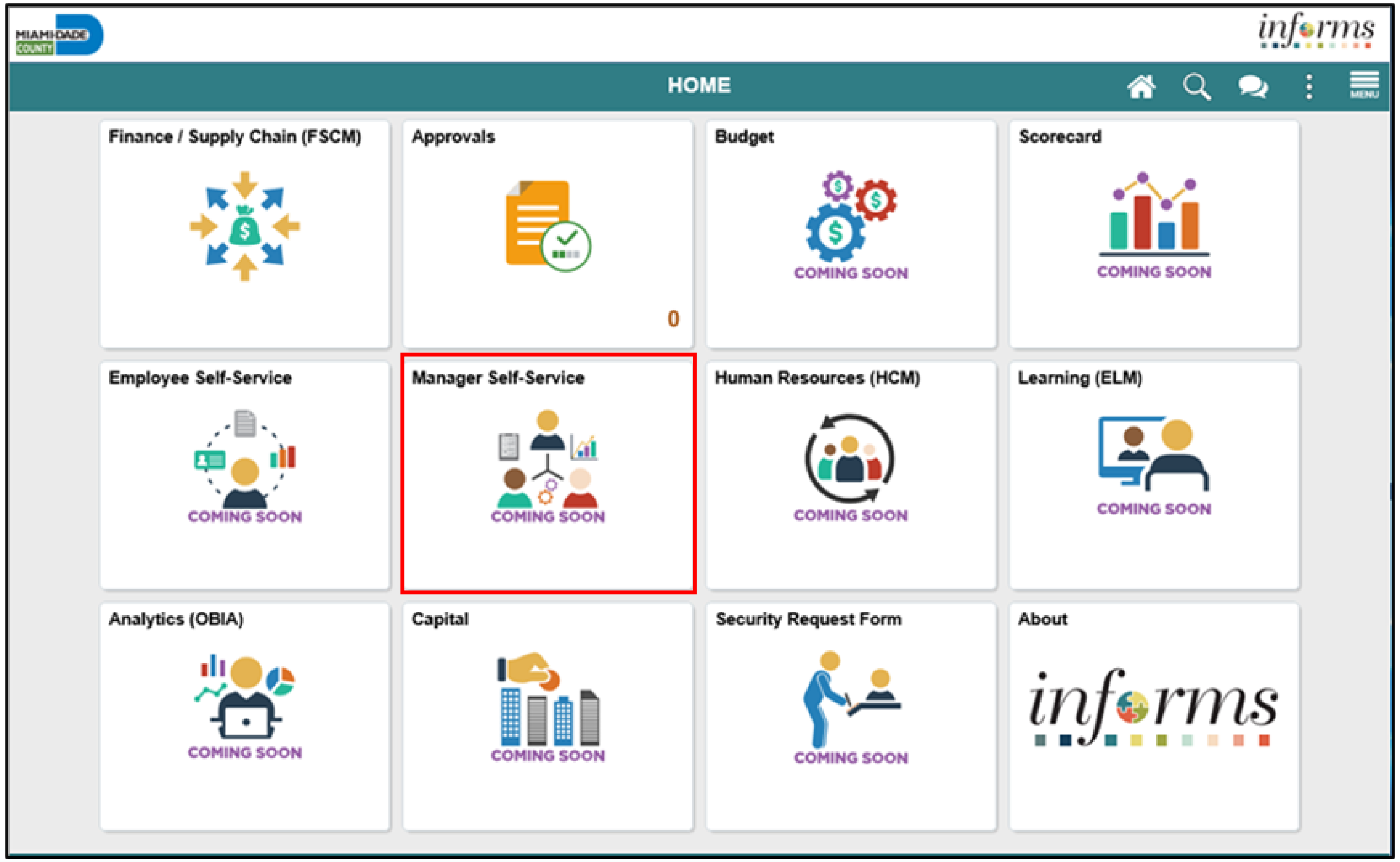
Roles and Responsibilities

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

Role	Responsibilities
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.

Navigation

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



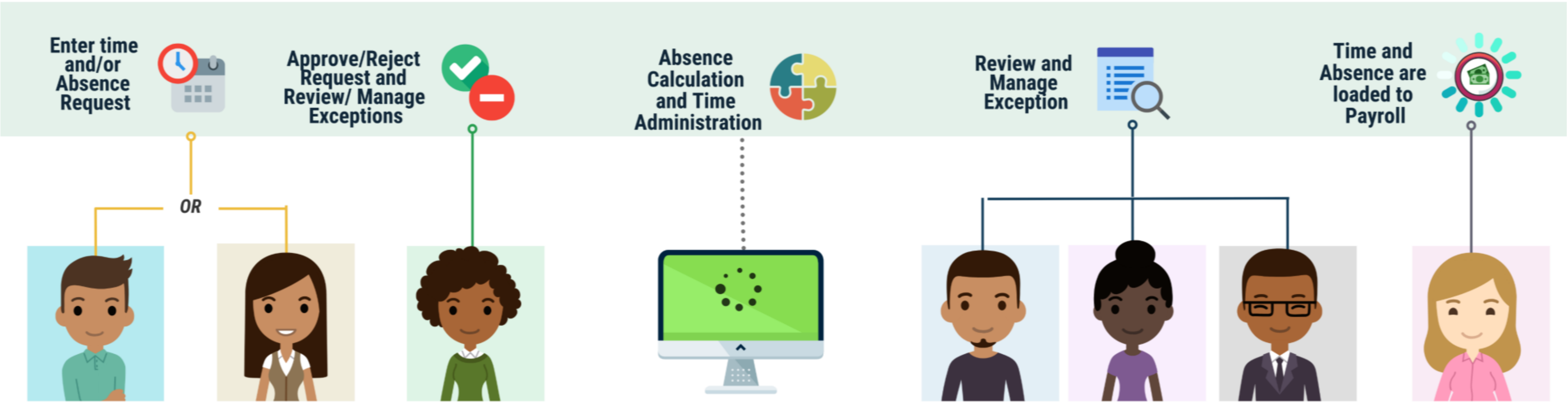
Purpose and Benefits to Business Process

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

- Reduce paper processes (Electronic workflows)
- Real-time updates to time and absence entry and approvals
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities)
- Reduction of processing time
- Enhanced Reporting

End-to-End Business Process

TIME AND ABSENCE APPROVAL
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; 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.

DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)

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

TIME AND LABOR CENTRAL ADMINISTRATOR

The Time and Labor Central Administrator is responsible in accessing all Miami-Dade County employees, configure Time & Labor elements and run time administration process.

ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR

The Absence Management Central Administrator is responsible for all Miami-Dade County employees, configure absence elements and run absence processes.

PAYROLL CENTRAL ADMINISTRATOR

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.

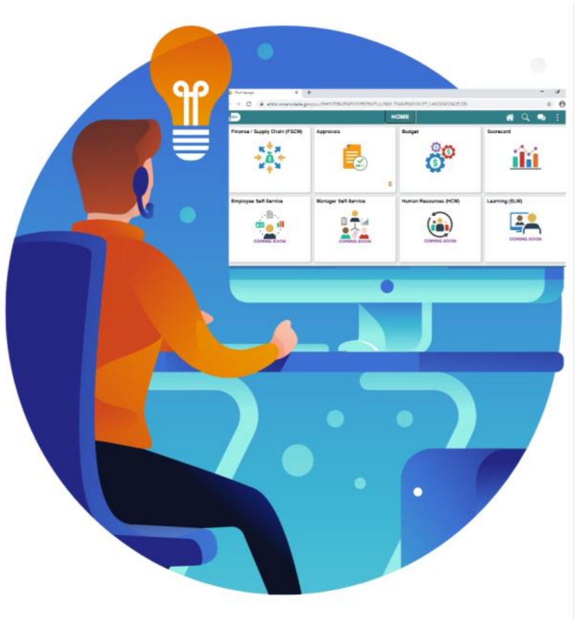
MIAMI-DADE COUNTY

Introduction to Activities and Exercises

- You will take part in two types of hands-on learning throughout this course.

Instructor Demo

Training Activities



Training Exercises

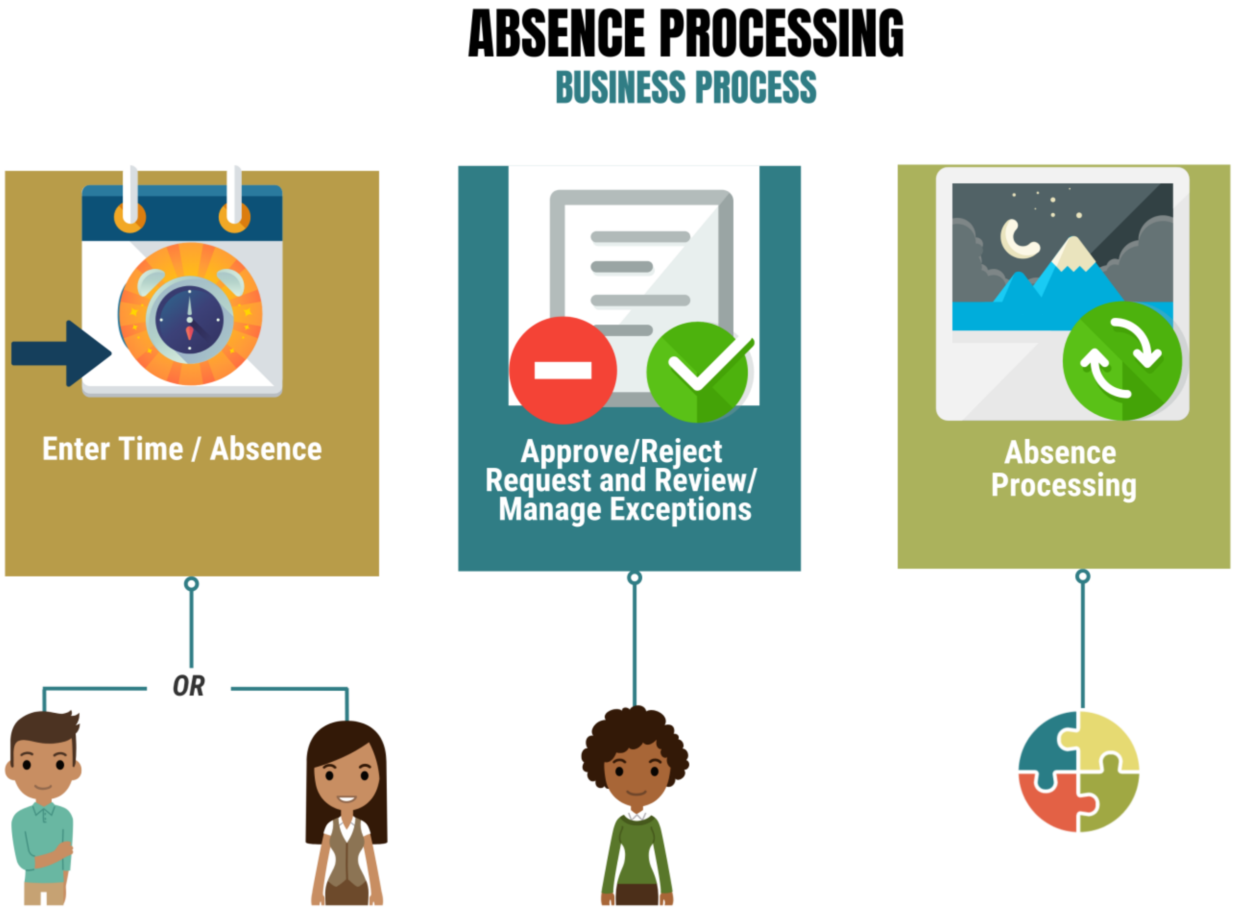
Module 1: Course Introduction Summary

Module Topics
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

Lesson 1: Approve Time and Absence

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

Lesson 1: Approve Time and Absence



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).

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

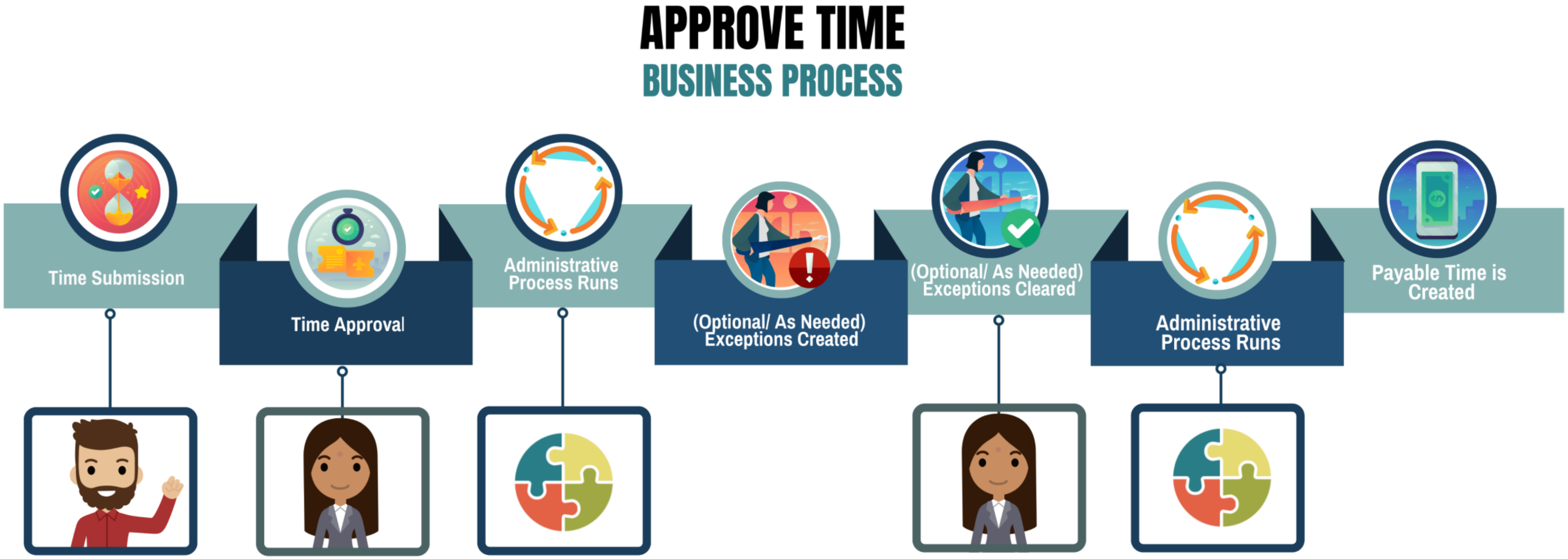
MANAGER

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 Absence



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.

Lesson 1: Key Terms

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 reported time not in compliance 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.

Lesson 1: Key Terms

Term	Definition
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.
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.

Lesson 1: Key Terms

Term	Definition
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.

Lecture 1: Approve Time and Absence

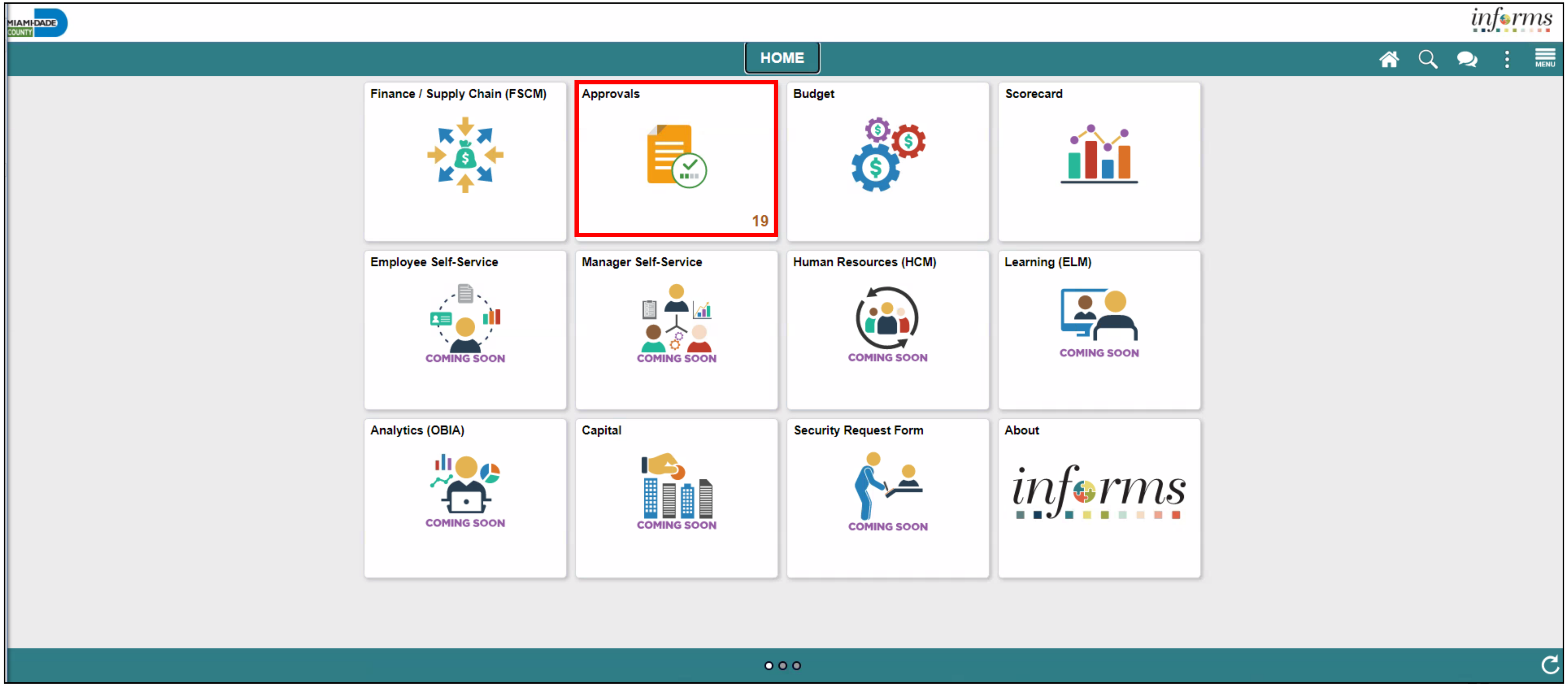
<u>Approving Reported Time / Absence</u>

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

Lecture 1: Approve Time and Absence Continued

The following outlines how to approve time through batch approval:

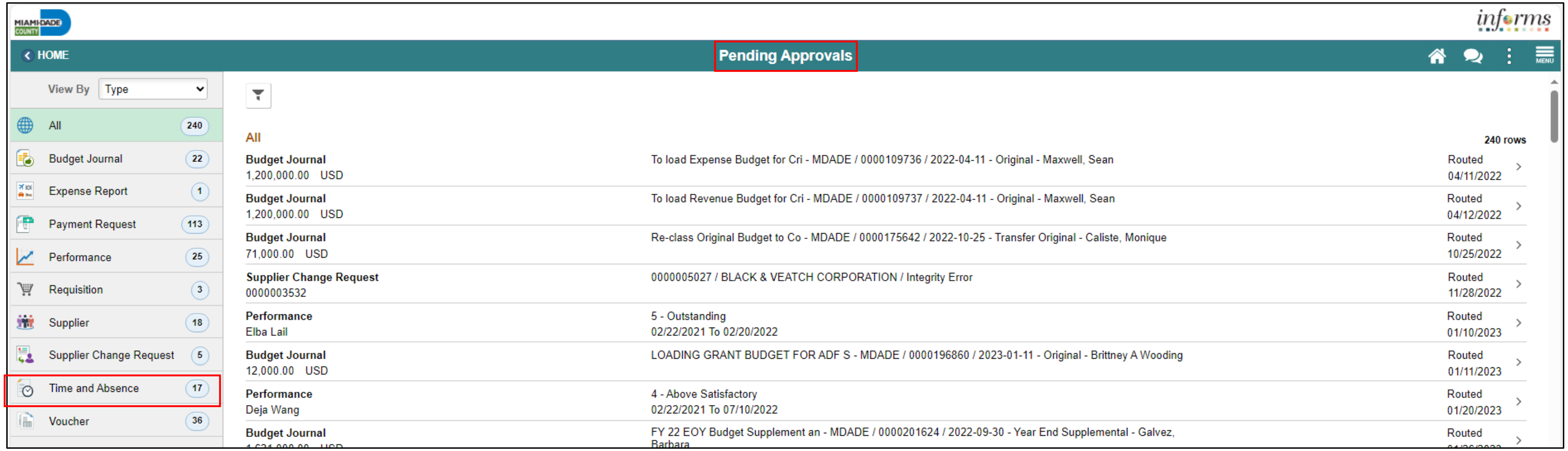
1. Navigate to: **Home > Approvals.**



Lecture 1: Approve Time and Absence Continued

2. The list of Pending Approvals will be available via **Pending Approvals** page.

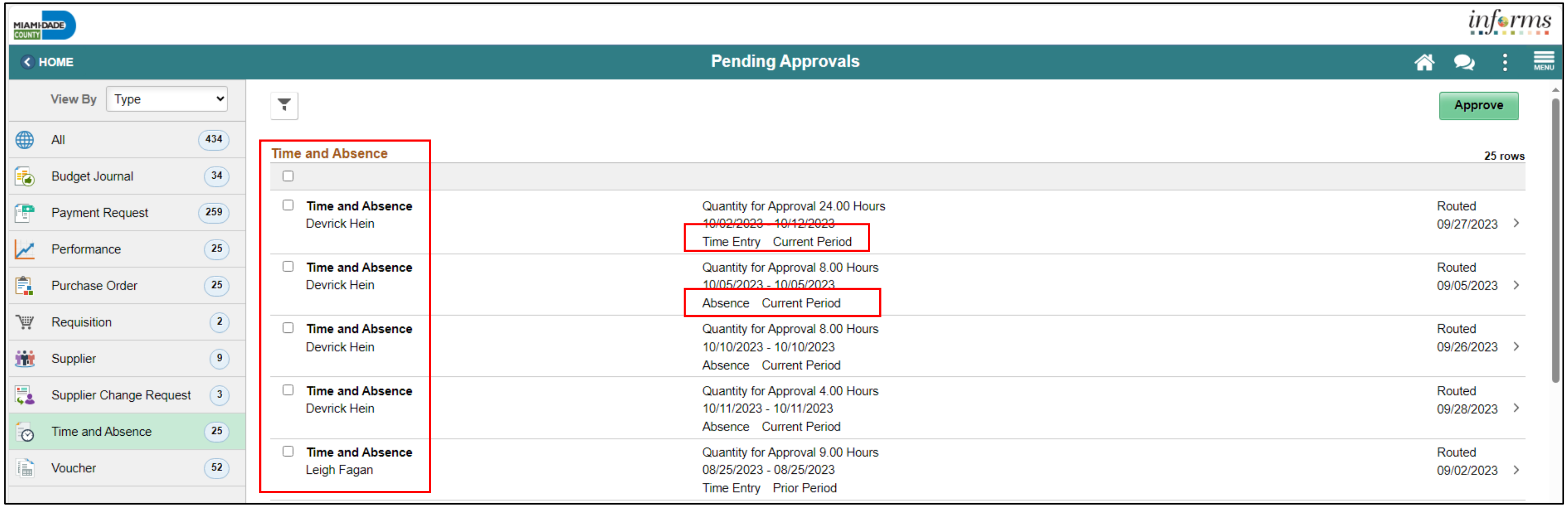
3. Select **Time and Absence** to view the list whose time need to be approved.



Lecture 1: Approve Time and Absence Continued

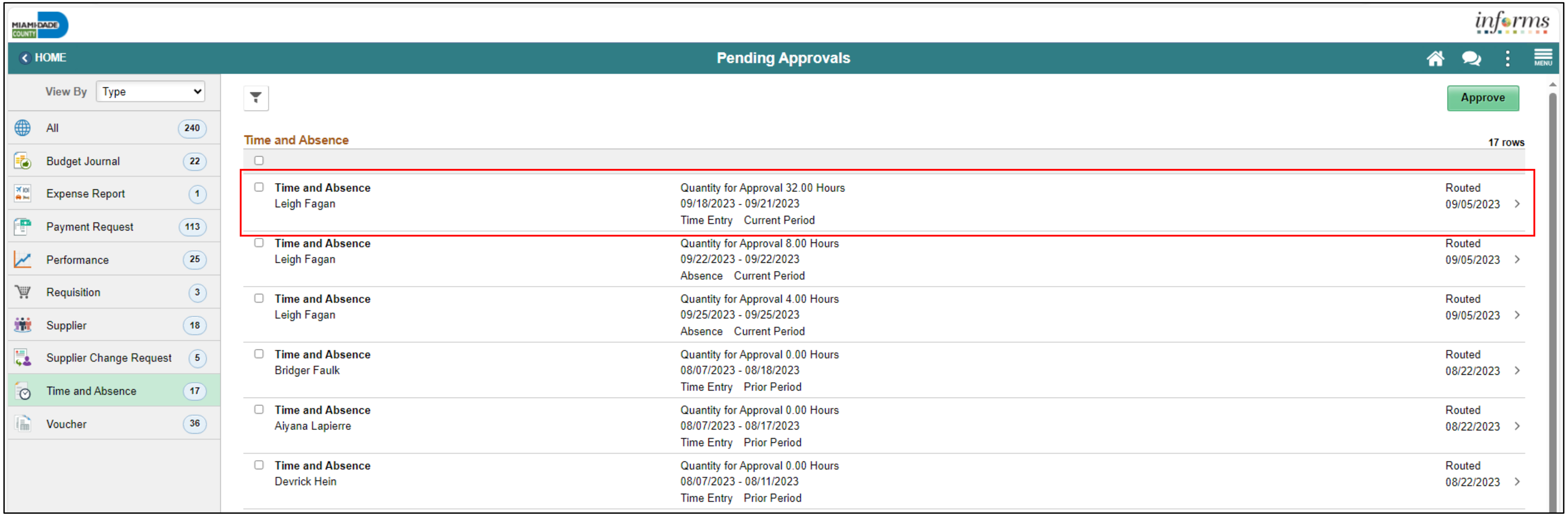
4. You can approve for an individual employee, or mass approve employees without drilling into details by selecting multiple employees or the check box at the top row and selecting the approval button.
Note: The new indicator feature will distinguish between Time entries and Absence entries and the corresponding period and will be 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



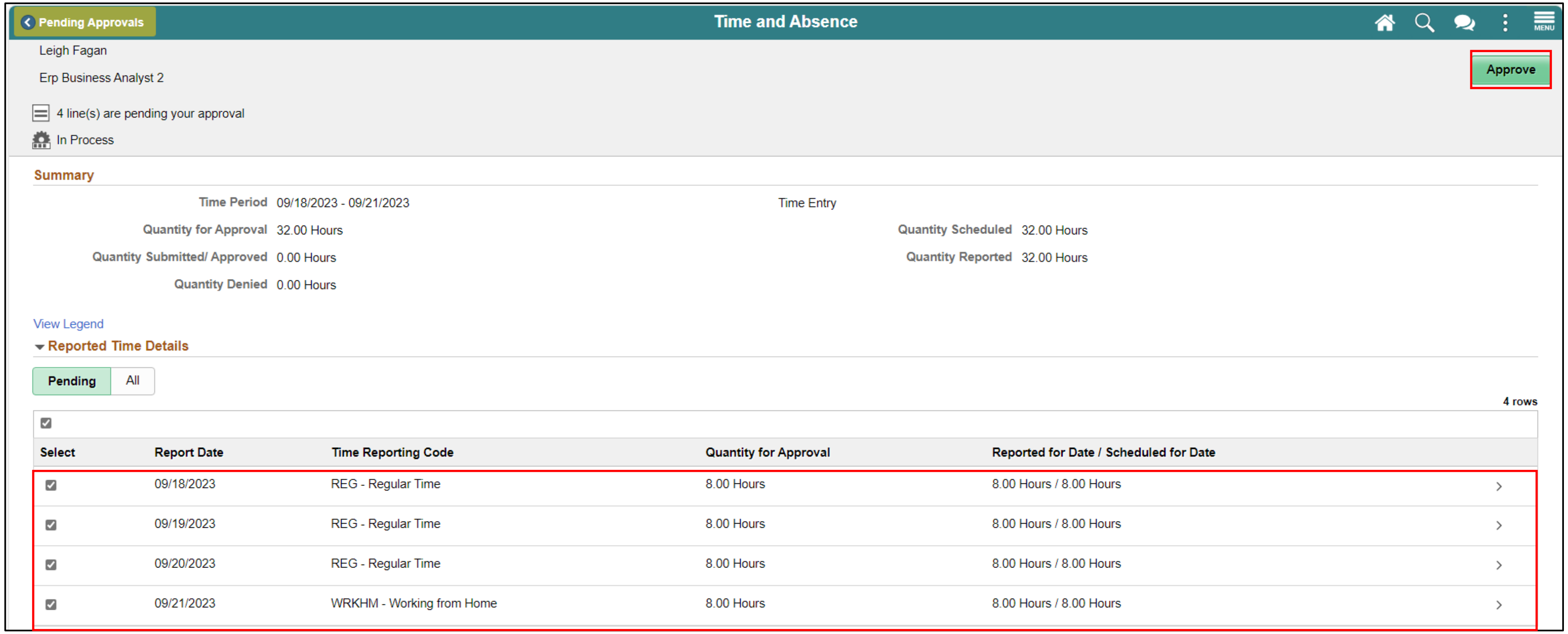
Lecture 1: Approve Time and Absence Continued

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



Lecture 1: Approve Time and Absence Continued

6. 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. Select the **Approve** button to approve this employee’s timesheet.

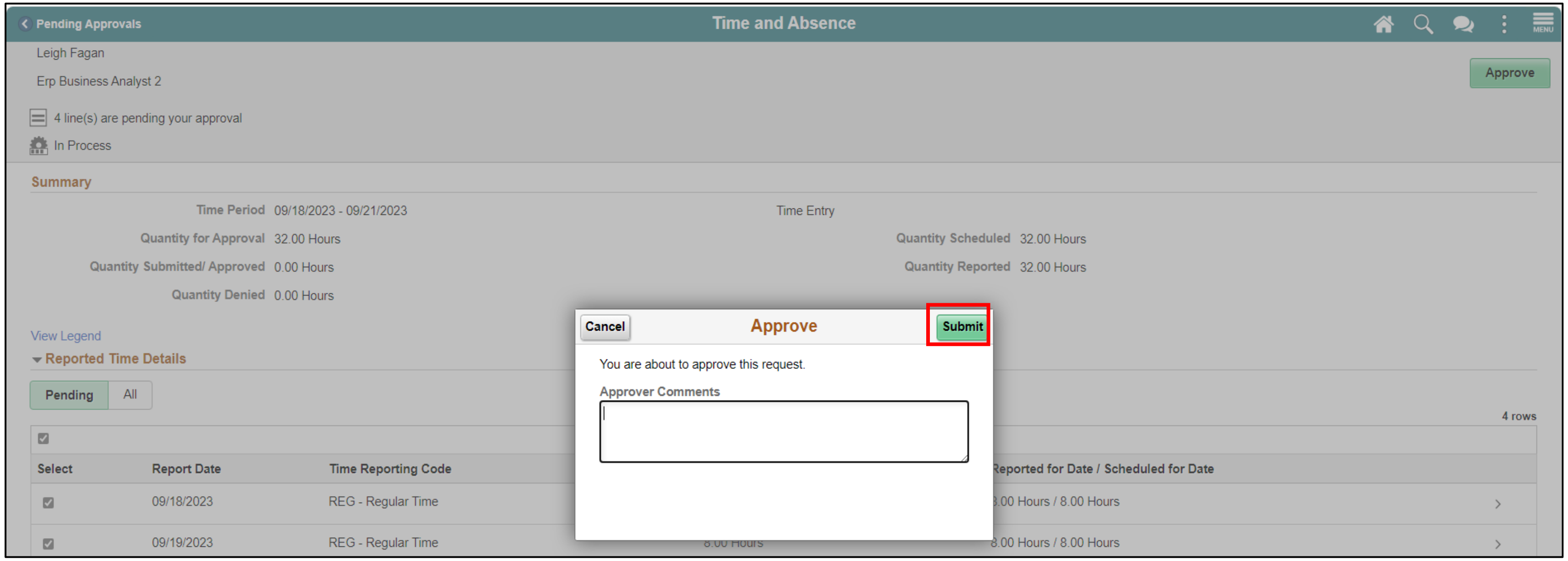


Lecture 1: Approve Time and Absence Continued

7. An **Approve** window will appear to ensure all comments are included prior to submitting the employee’s reported time.

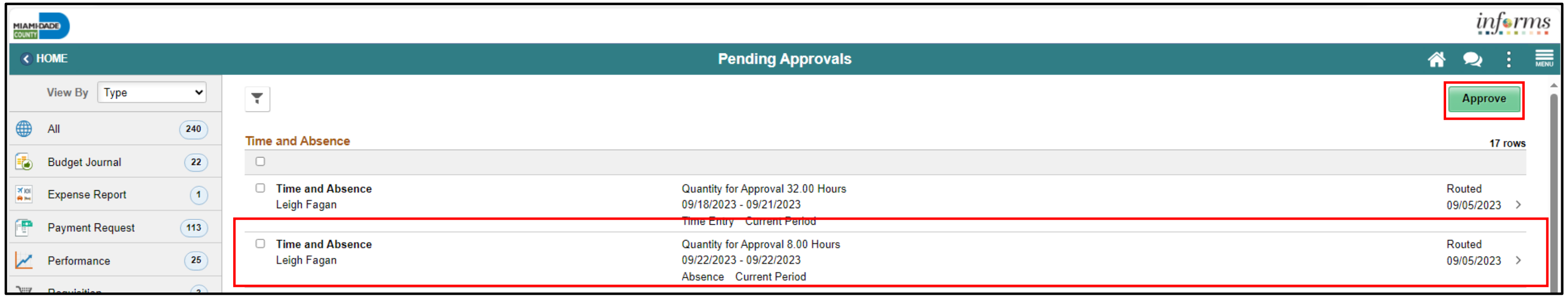
8. Select **Submit.**

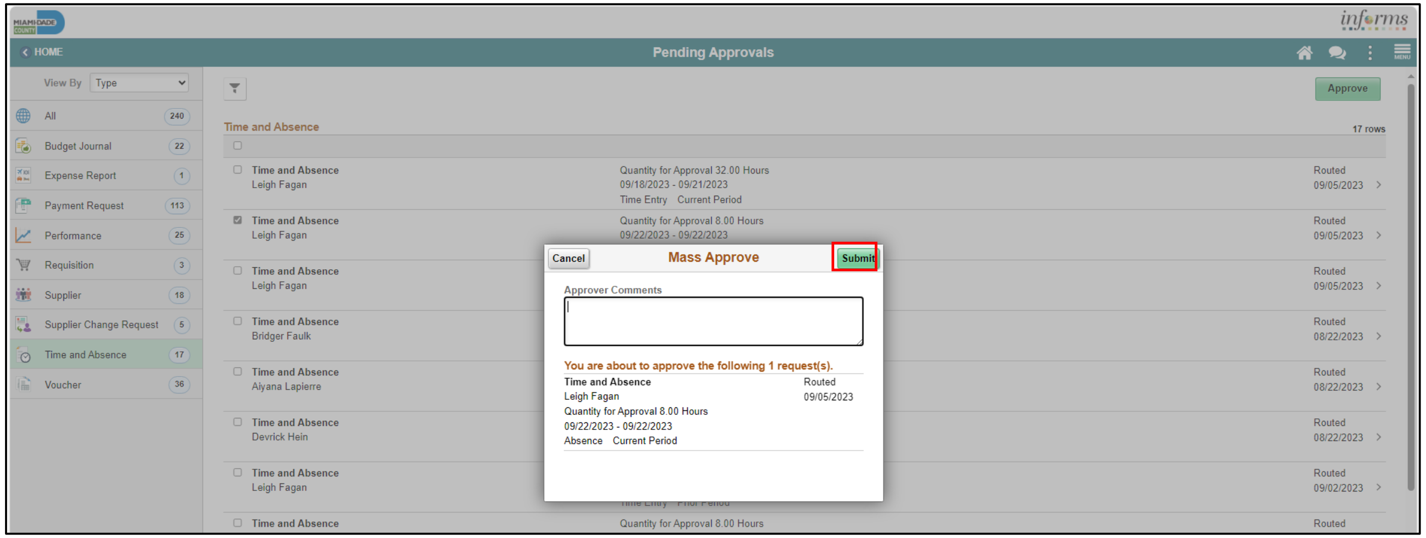
Note: Once submitted, INFORMS will populate a message to inform the approver that they have Approved the request.



Lecture 1: Approve Time and Absence Continued

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.** Finally, select **OK.**





Lesson 1: Activities and Exercises

Lesson 1: Lesson Summary

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

Lesson 2: View Forecast Balance

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

Lesson 2: Key Terms

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).
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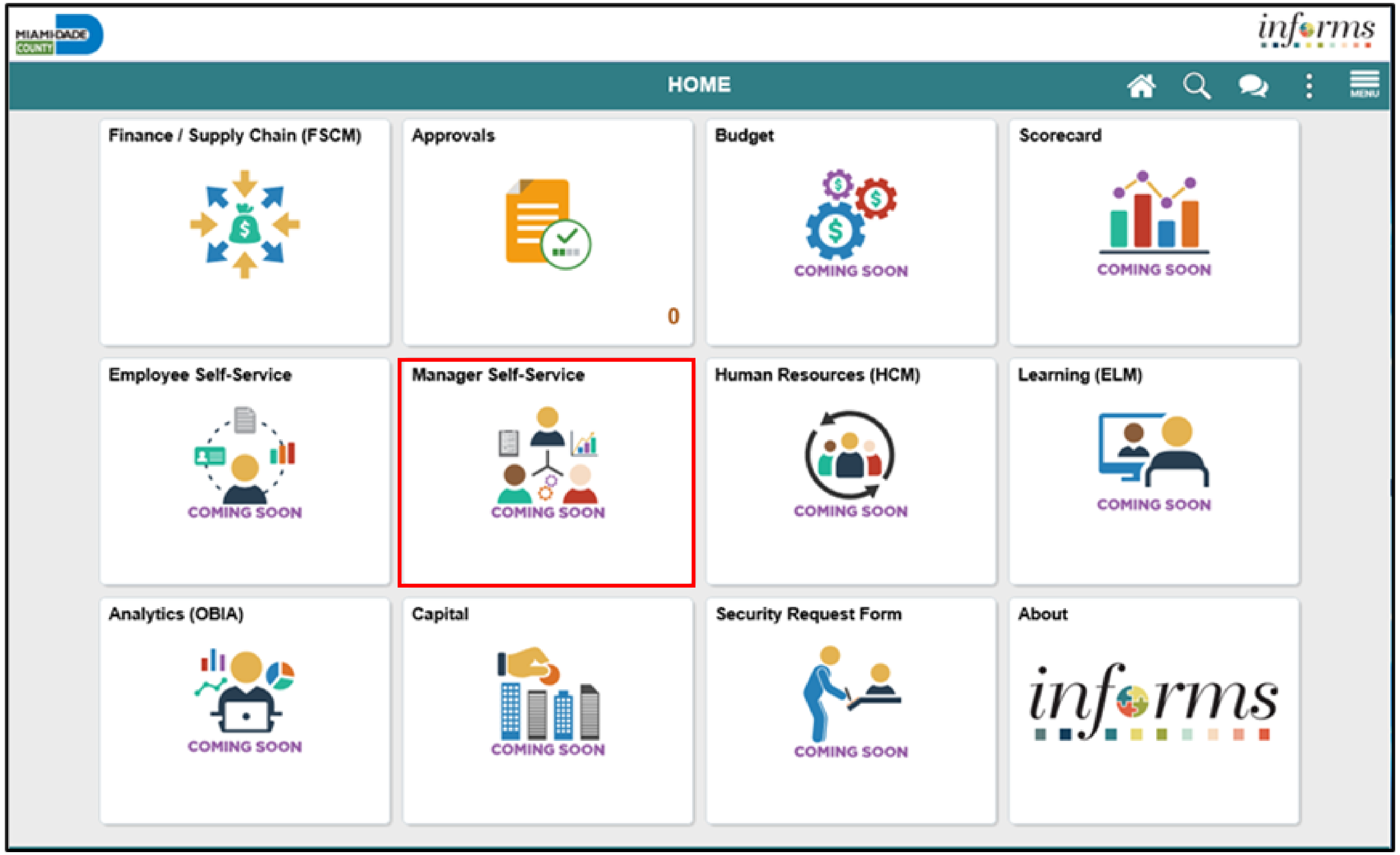
Eligibility Group	Determines which leave entitlements and absence takes an employee is eligible for, assigned on the Payroll Tab of Job data, also determines the accrual rates for entitlements.
Forecasting / Check Eligibility	Validation of sufficient balance and other additional criteria for an Absence Request.
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.

Lesson 2: View Forecast Balance Continued

- 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.

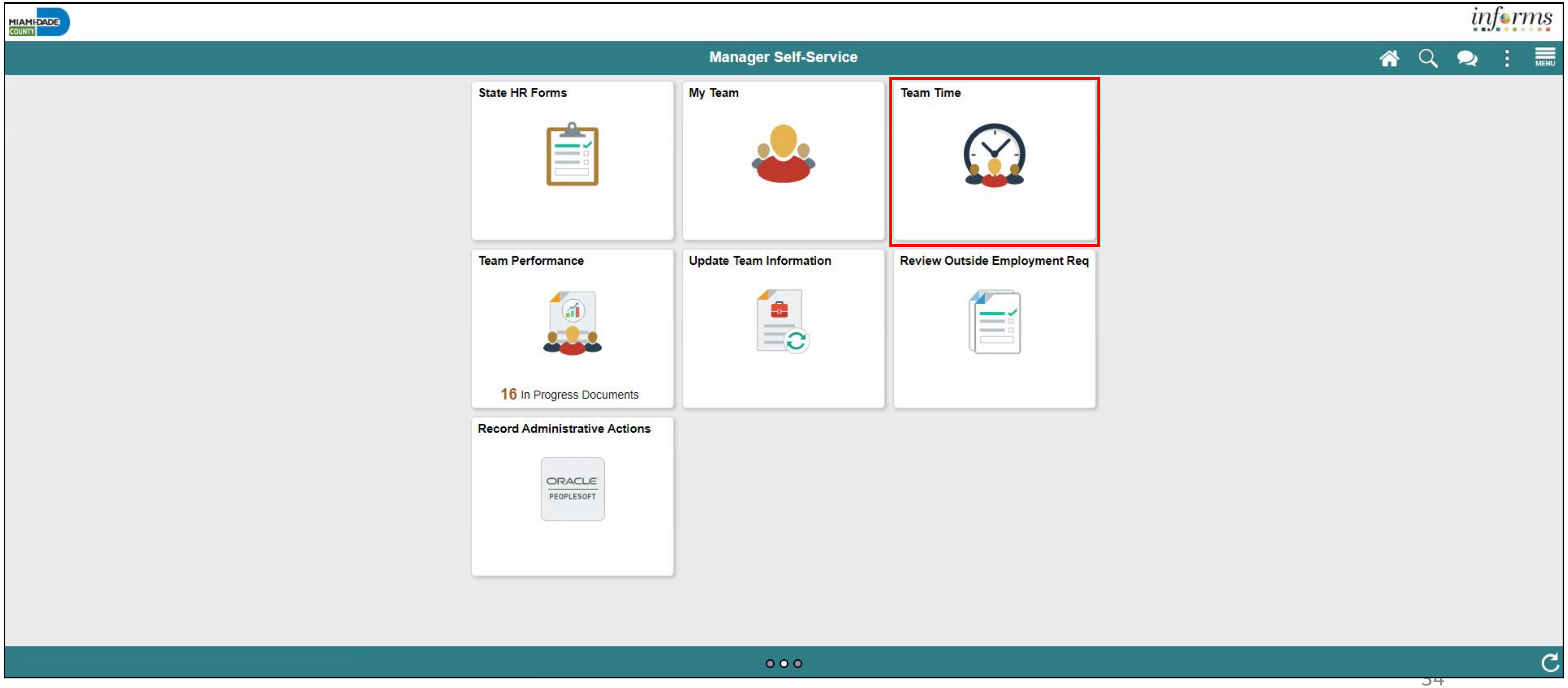
Lecture 1: View Forecast Balance

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



Lecture 1: View Forecast Balance Continued

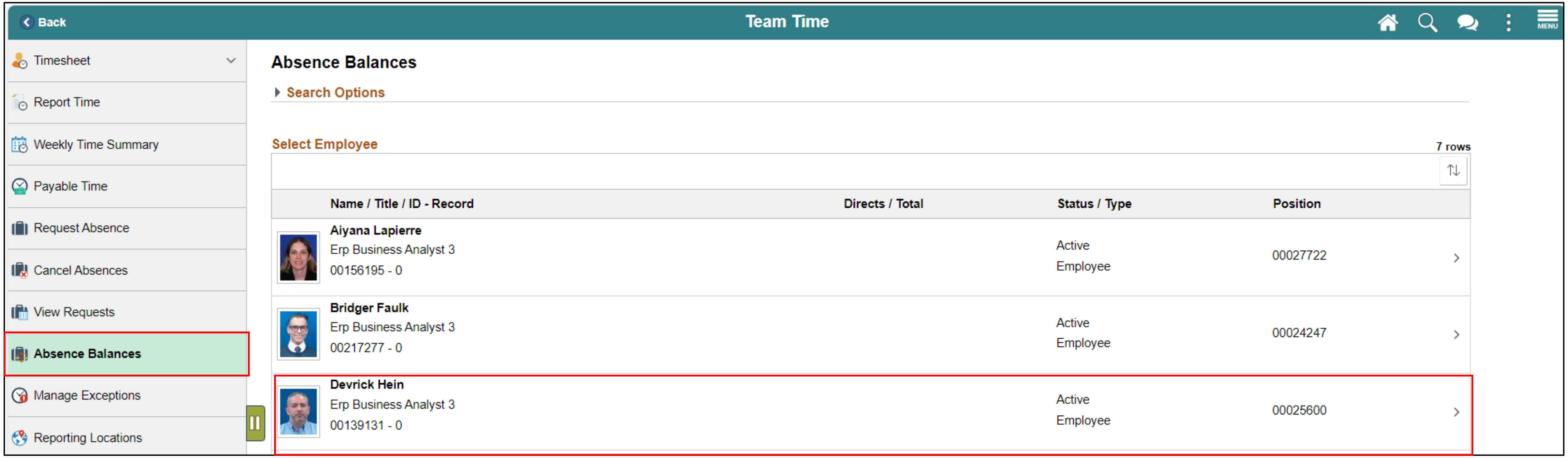
2. Select **Team Time**.



Lecture 1: View Forecast Balance Continued

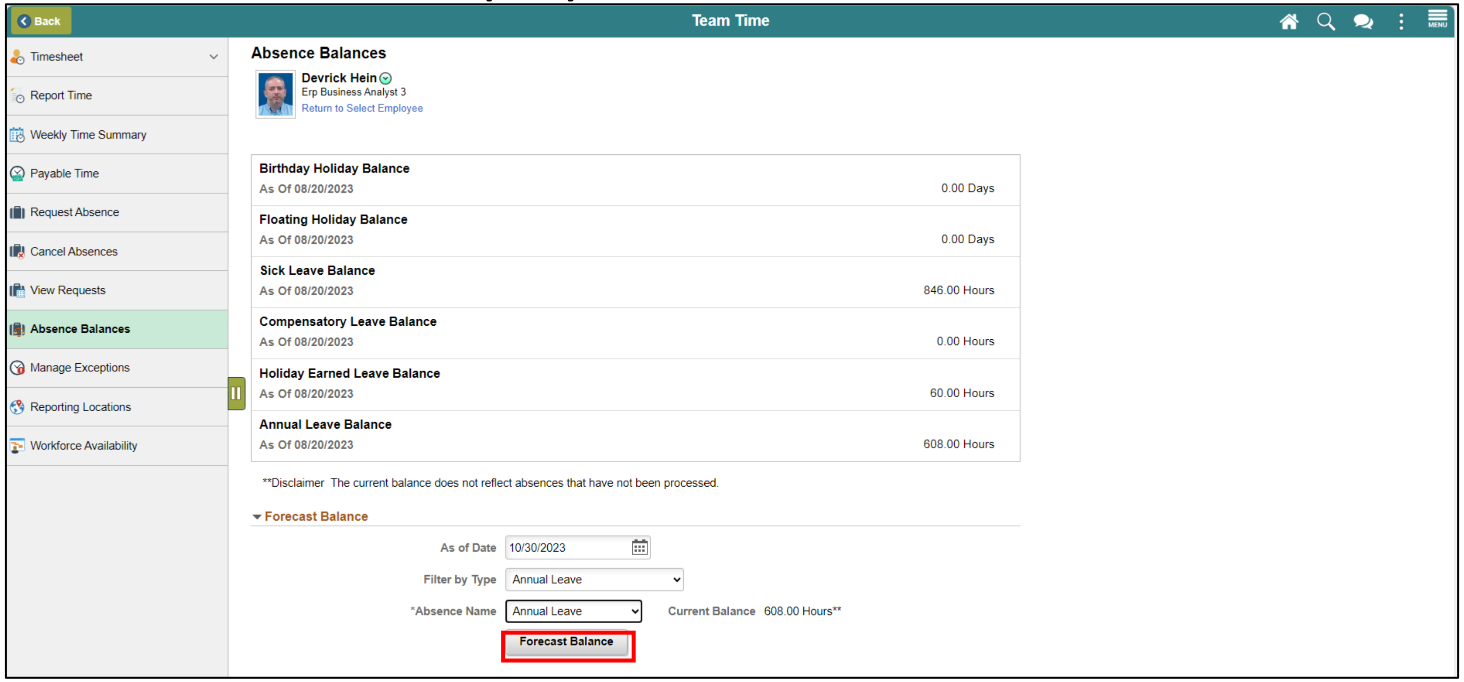
3. Select **Absence Balances**.

4. Select an employee’s absence balance record.



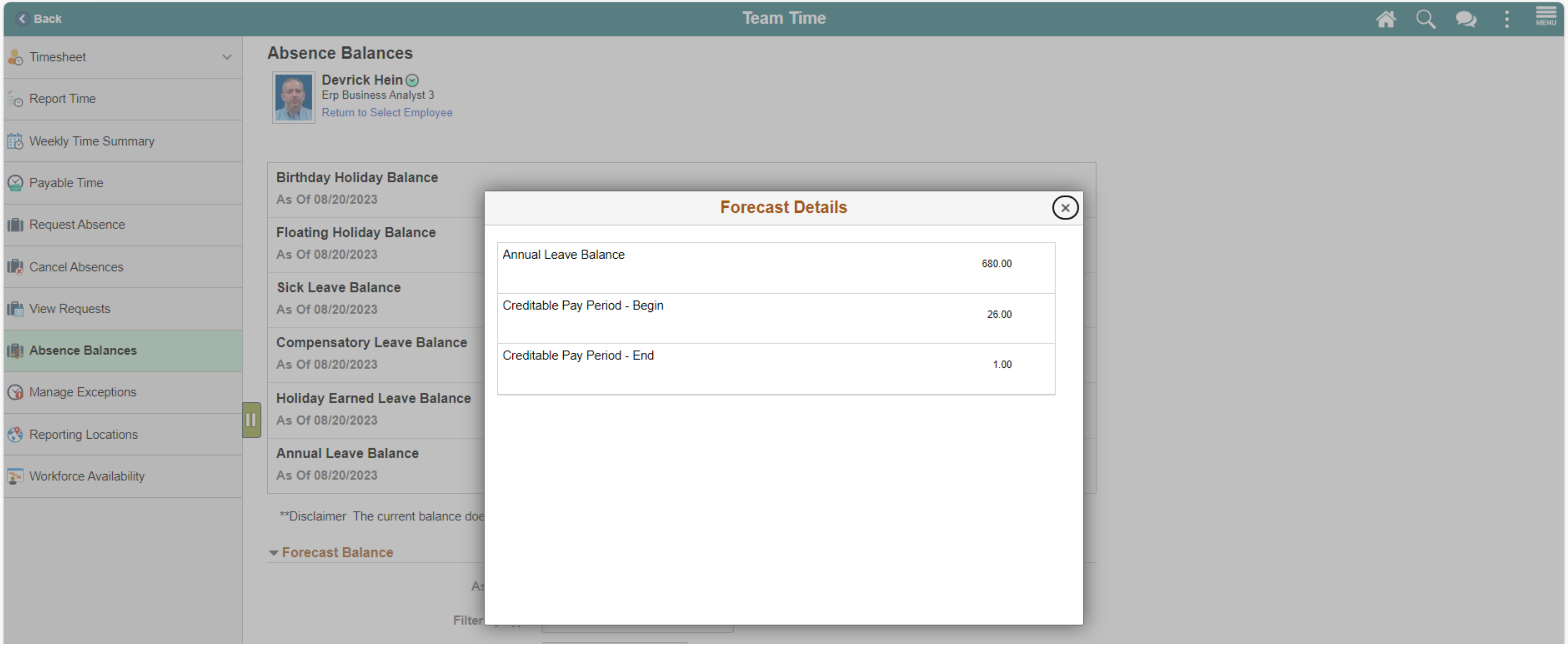
Lecture 1: View Forecast Balance Continued

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 **Forecast Balance** to display the forecasted balance details.

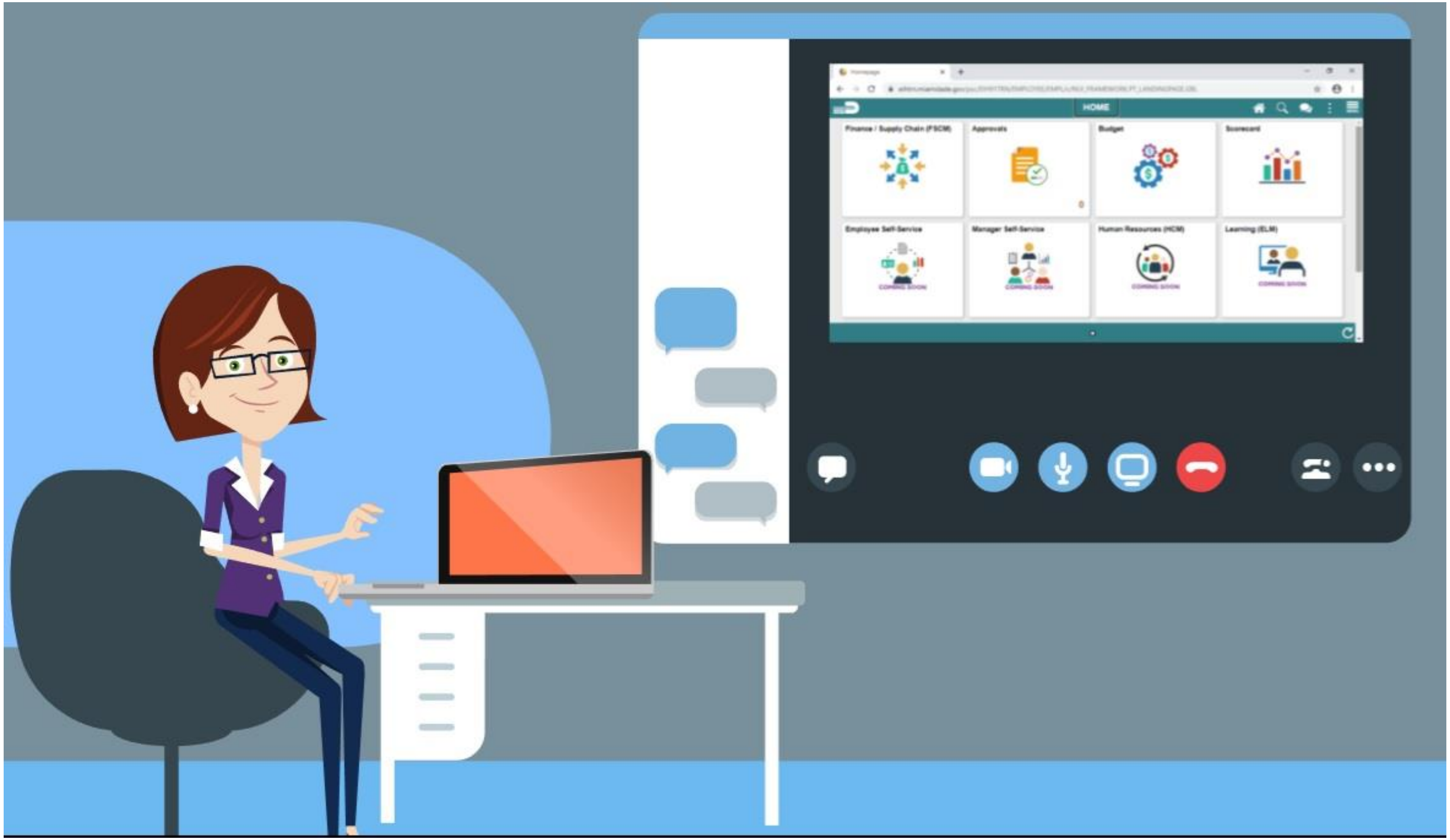


Lecture 1: View Forecast Balance Continued

The **Forecast Details** will display.



Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

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

- Forecast an employee's absence balance

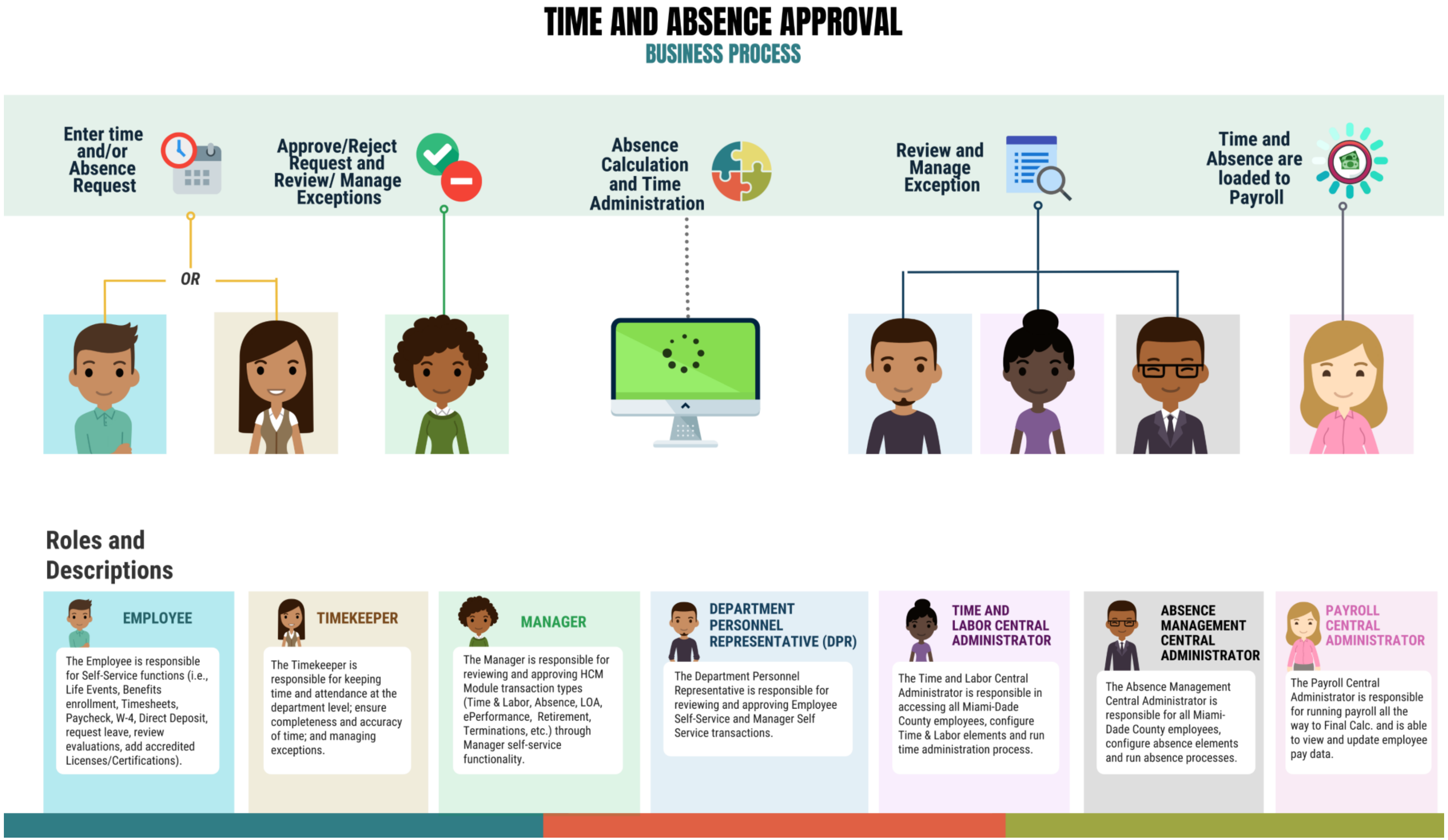
Lesson 3: Manage Exceptions

- Understand the difference between High, Medium and Low Severity Exceptions
- View and resolve time reporting exceptions

Lesson 3: Key Terms

Term	Definition
Exceptions	Any time reported that are not in compliance with the Pay Plan or CBA 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 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.

Lecture 1: Overview of Exceptions



Lecture 1: Overview of Exceptions Continued

- Exceptions are user and system-generated warnings and errors that indicate a problem with an employee's reported time or a problem in INFORMS.
- The following topics will be reviewed in this lesson:
  - Overview of Exceptions
  - Review Exceptions

Lecture 1: Overview of Exceptions Continued

- Exceptions generate when time is reported and either an aspect of time is incorrect, or the time doesn't comply with user-defined rule.
- Exceptions may be system-generated through validation processes or generated as a result of Time Administration rules.
- Exceptions have severity levels:
  - **High**
  - **Medium**
  - **Low**

Lecture 1: Overview of Exceptions Continued

Overview of Exceptions

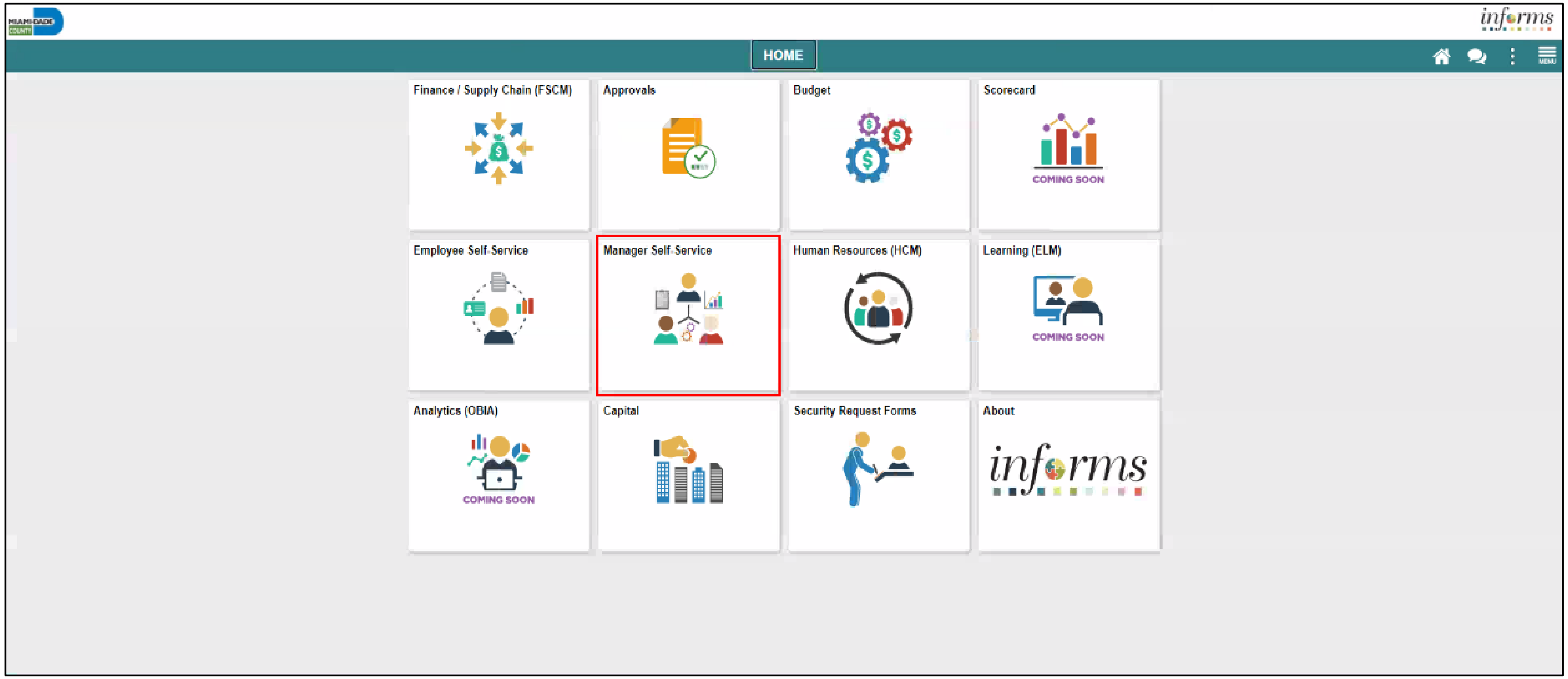
The following are different types of exceptions that can occur:

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

Lecture 2: Manage Exceptions

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

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

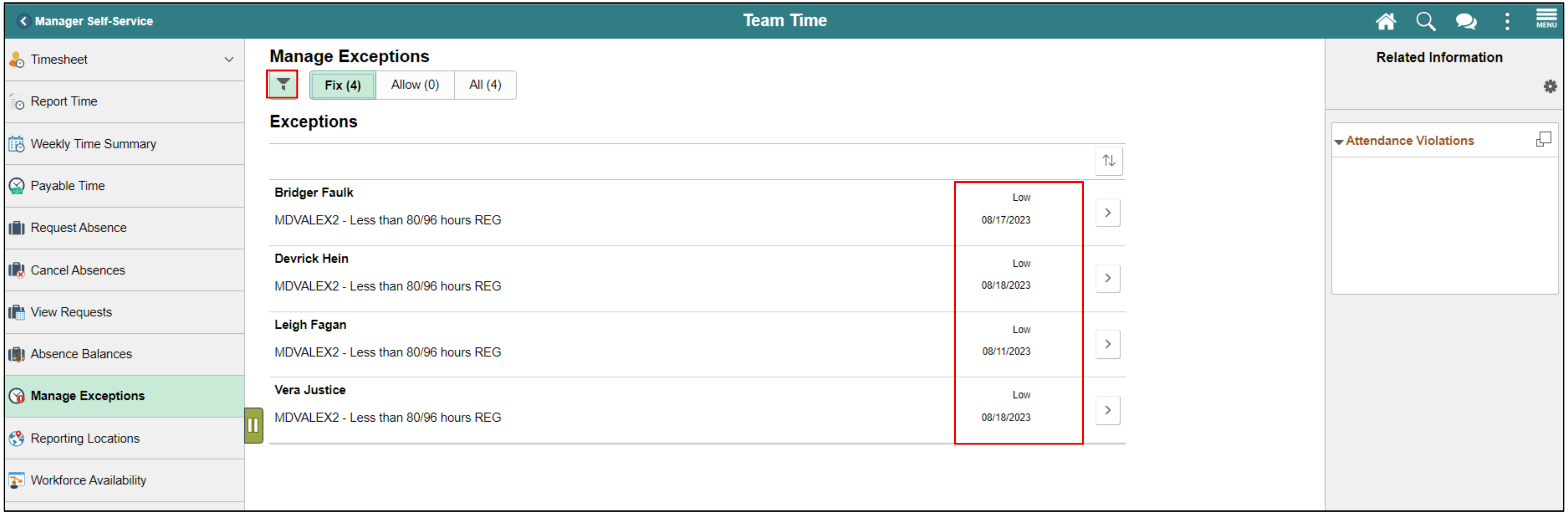


Lecture 2: Manage Exceptions Continued

2. Select **Manage Exceptions** then choose the employee. You can use the two filter icons to narrow down your search.

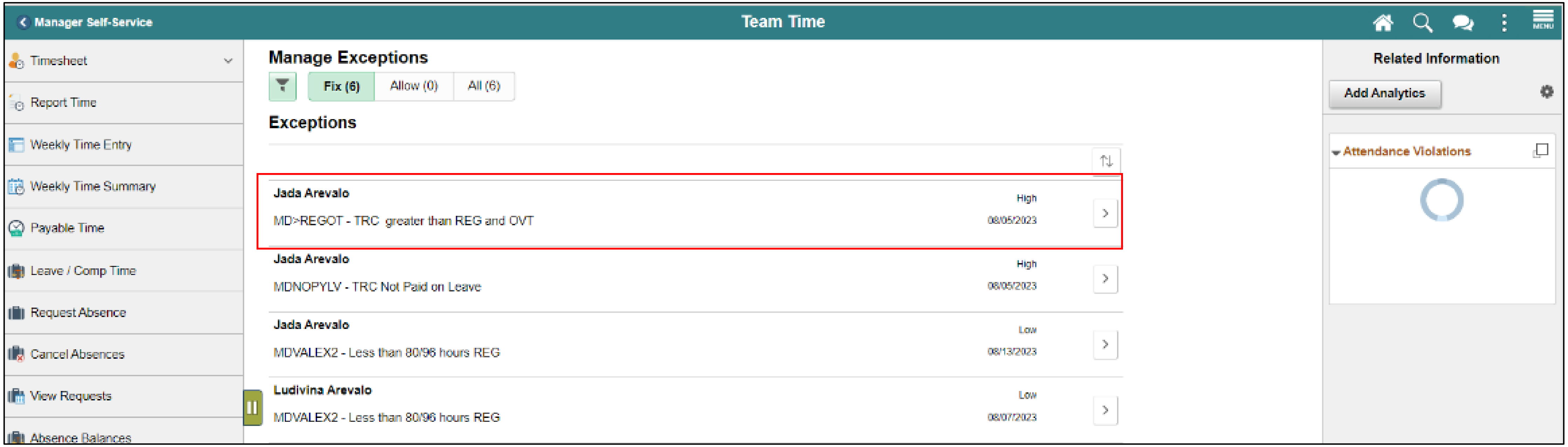
Lecture 2: Manage Exceptions Continued

- **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.



Lecture 2: Manage Exceptions Continued

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

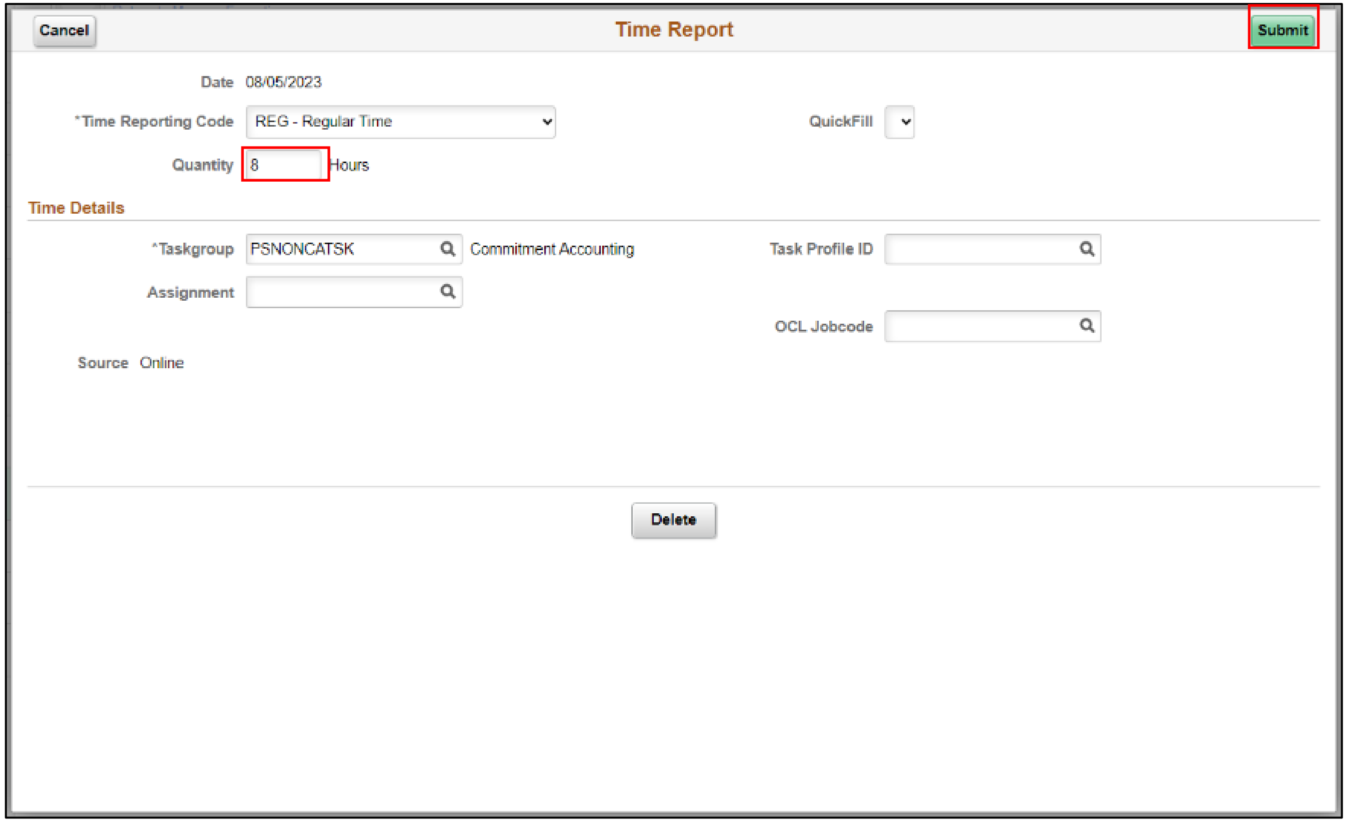


Lecture 2: Manage Exceptions Continued

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

Lecture 2: Manage Exceptions Continued

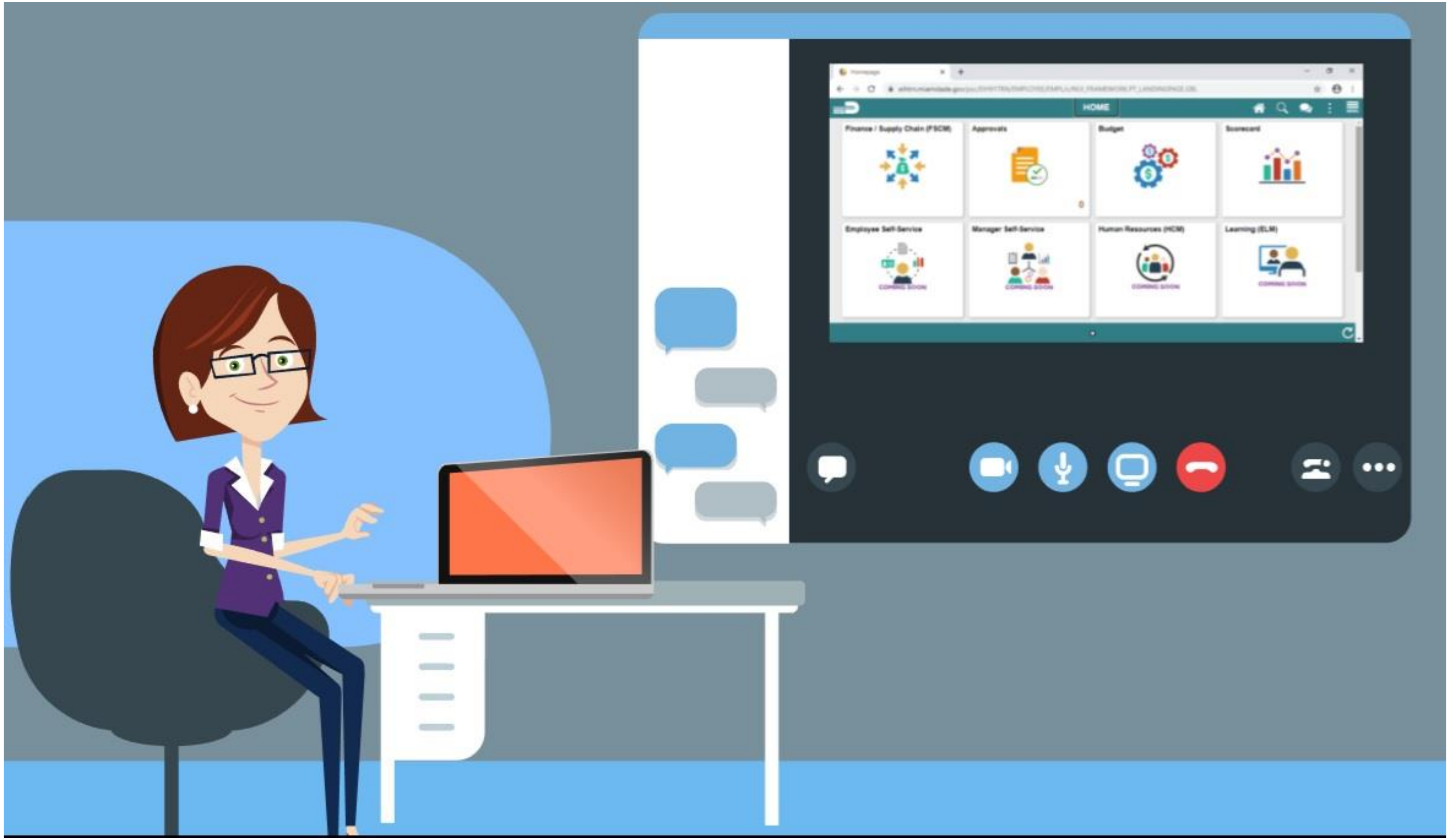
5. In the **Time Report** page, review the exception and make appropriate updates then select **Submit**. In this example, the correct hours quantity is inputted. However, the exception may have been generated due to an incorrect **Time Reporting Code** or **Taskgroup**.



Lecture 2: Manage Exceptions Continued

- **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: Activities and Exercises



Lesson 3: Lesson Summary

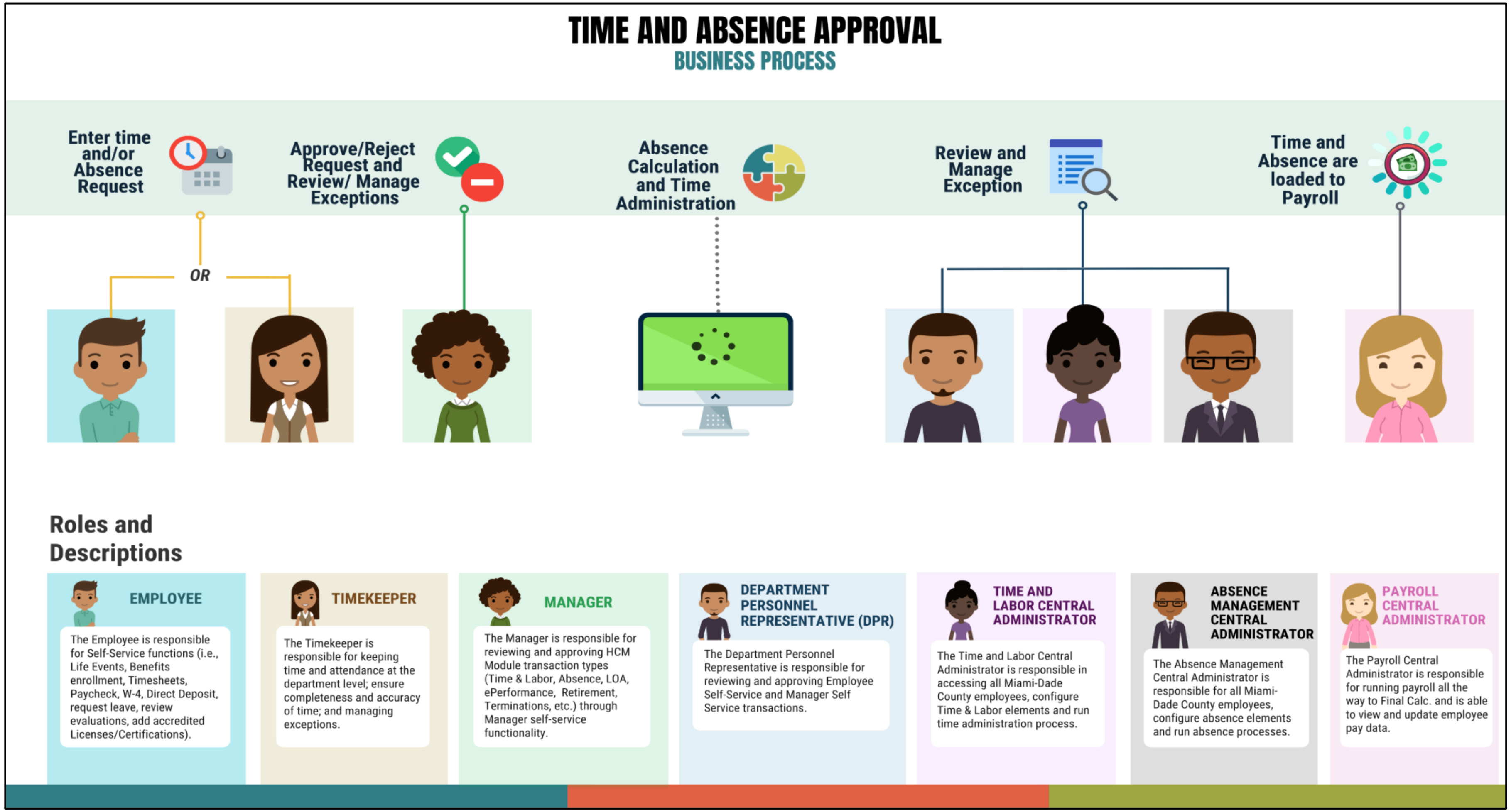
Now that you have completed the lesson, you should be able to:

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

Lesson 4: Enter Time on behalf of Employee

- 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 Continued



Lesson 4: Key Terms

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.

Lecture 1: Timekeeping During the Current Period

<u>Timekeeping during the Current Period</u>

- 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*.

- 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.

Lecture 1: Timekeeping During the Current Period Continued

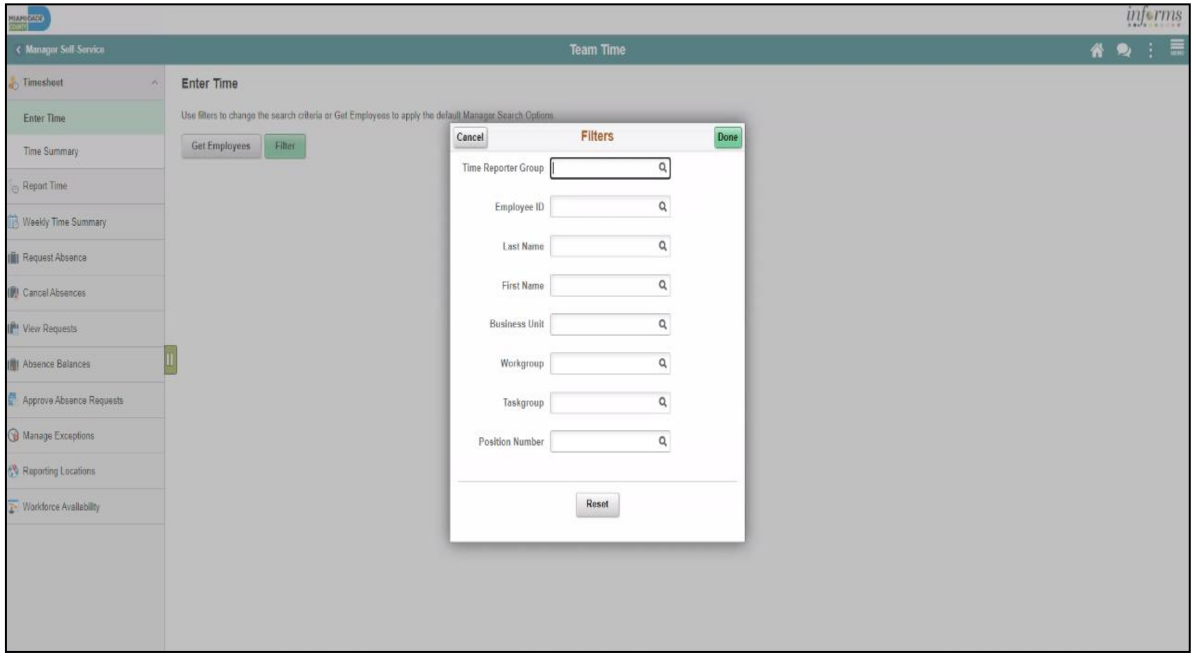
- Reported time is considered time worked after an employee submits time through the timesheet.
- Payable time is the end product of the Time and Labor module. Payable time represents:
  - The quantity of work performed, in hours or dollars
  - The time reporting code that controls how the employee is paid
  - The tasks to which time was reported by the employee

Lecture 2: Enter Time on behalf of Employee

Navigate to: **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.



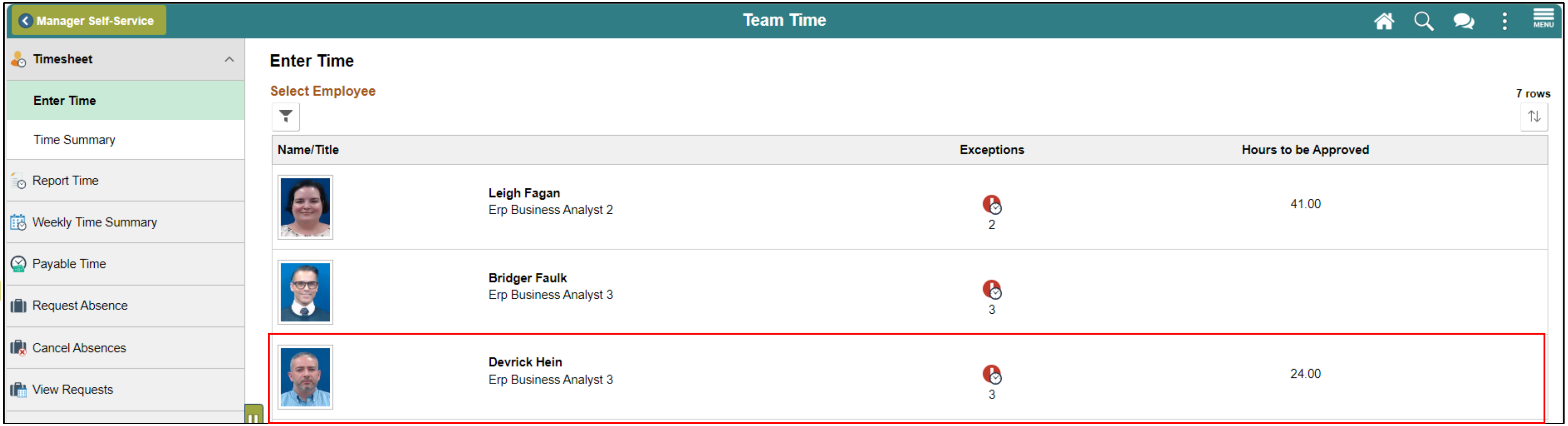
Lecture 2: Enter Time on behalf of Employee Continued

2. Select **Get Employees** to see all employees or use the **Filter** and enter any of the search selection criteria indicated to filter and narrow down the search results. 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, Taskgrop** to narrow the search results.

Lecture 2: Enter Time on behalf of Employee Continued

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

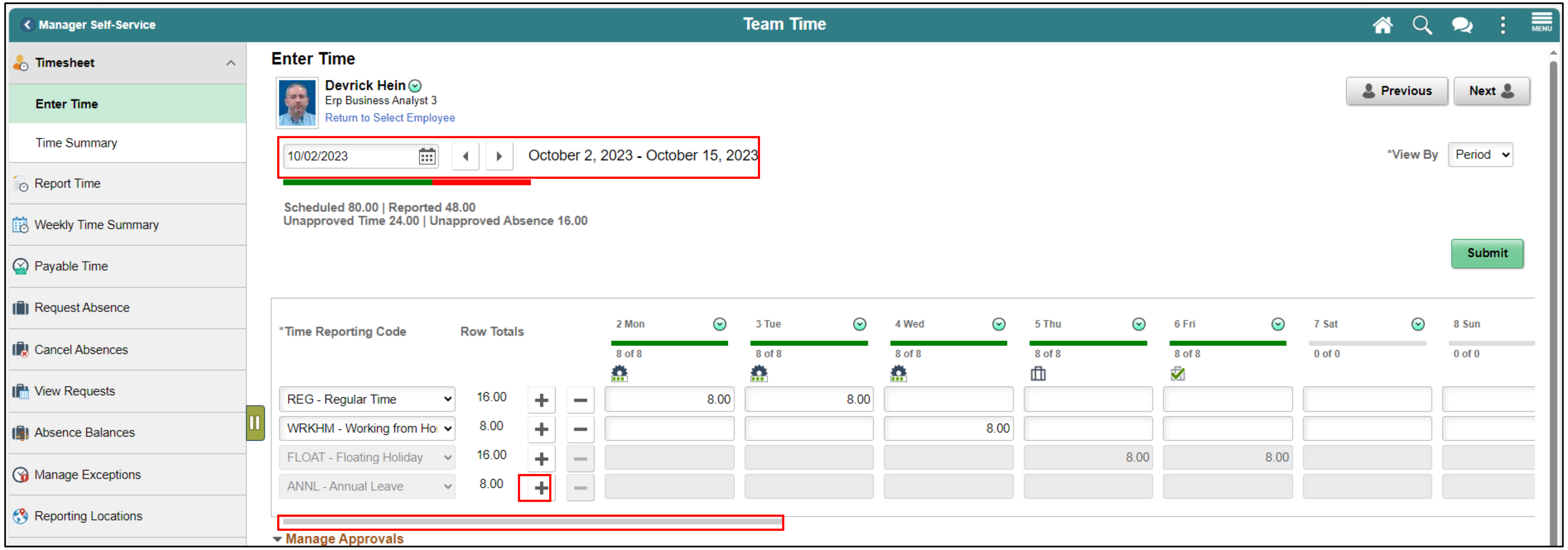


Lecture 2: Enter Time on behalf of Employee Continued

4. Review the employee’s timesheet for this period. Ensure you are in the correct Pay Period.

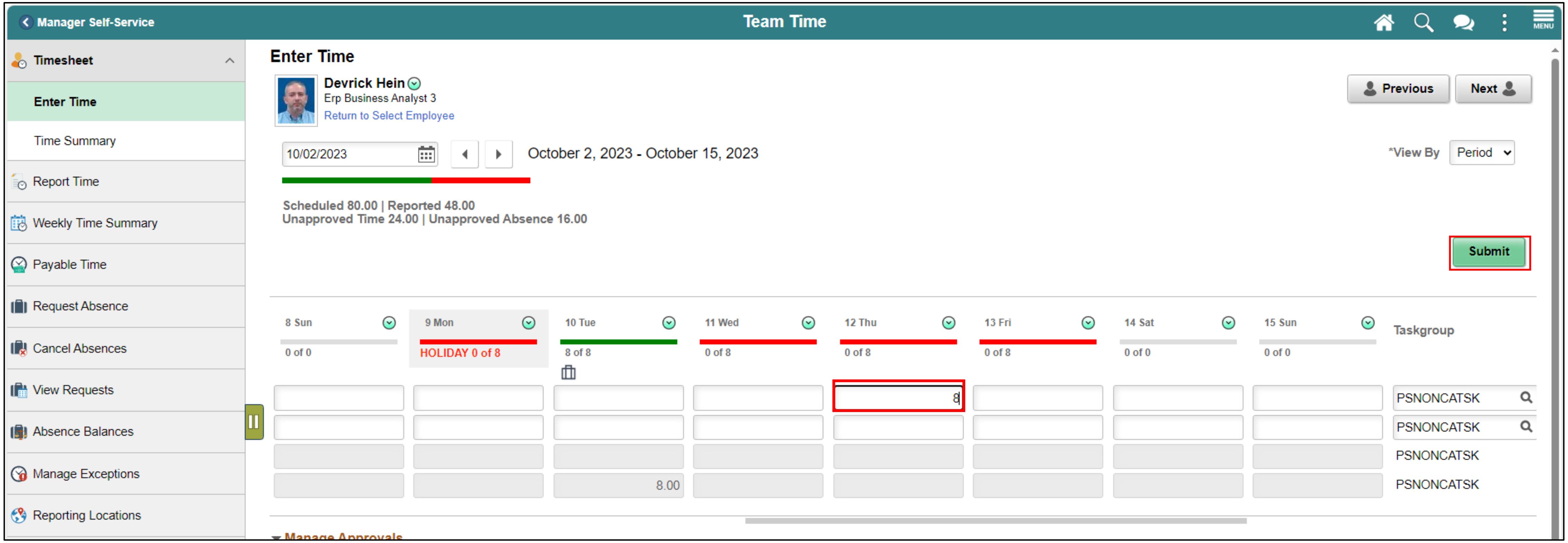
5. Select the ‘+’ button to add an additional line for a unique **Time Reporting Code**. Use the slider to view additional dates in the Pay Period.

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



Lecture 2: Enter Time on behalf of Employee Continued

6. Enter desired hours and select submit.



Lecture 2: Enter Time on behalf of Employee Continued

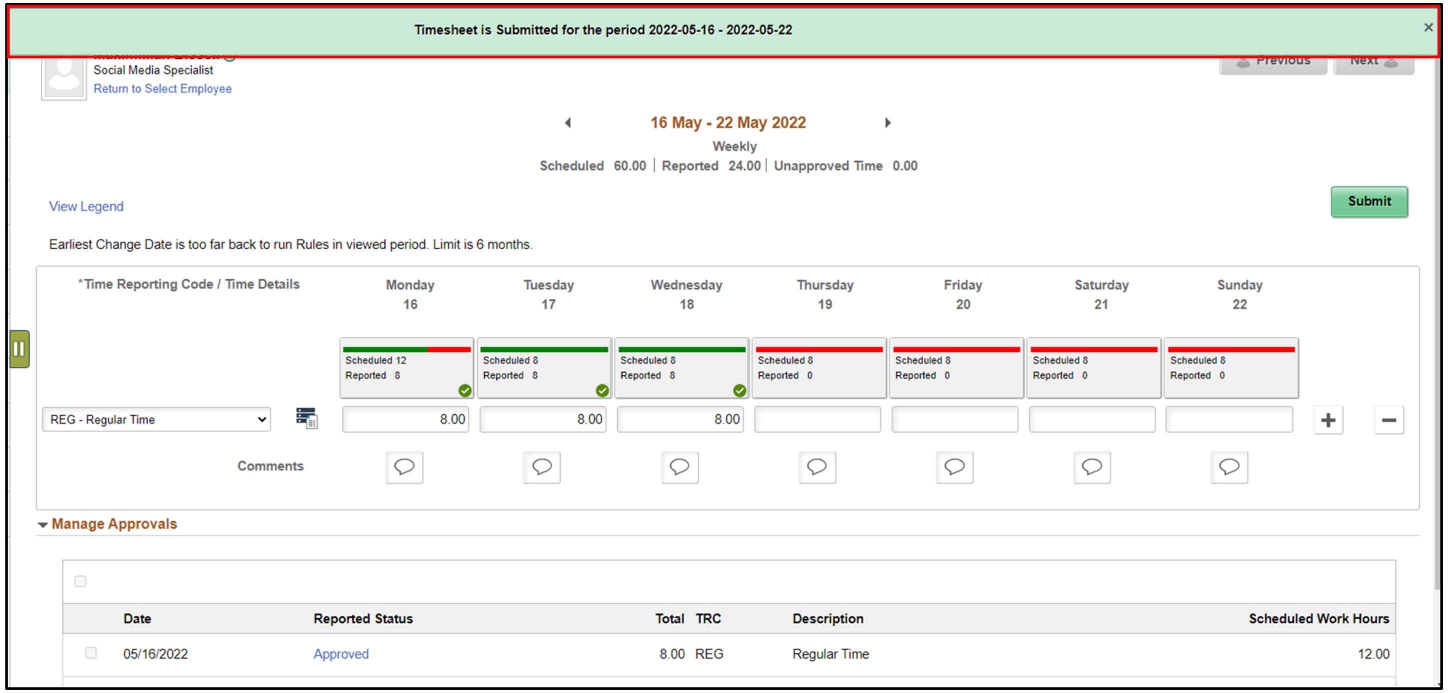
7. For each line select the appropriate **Time Reporting Code.**
    - The options will vary based on the employee's job and tasks.

The following are some common time reporting codes used:

- **REG** – Regular Hours Worked
- **OVT** – Overtime
- **CLBK** – Call Back or Call In Hours Work
- **NGT1** – Night Differential 1 Step

Lecture 2: Enter Time on behalf of Employee Continued

8. When all time and time reporting codes are entered, Select Submit. The following message will appear:



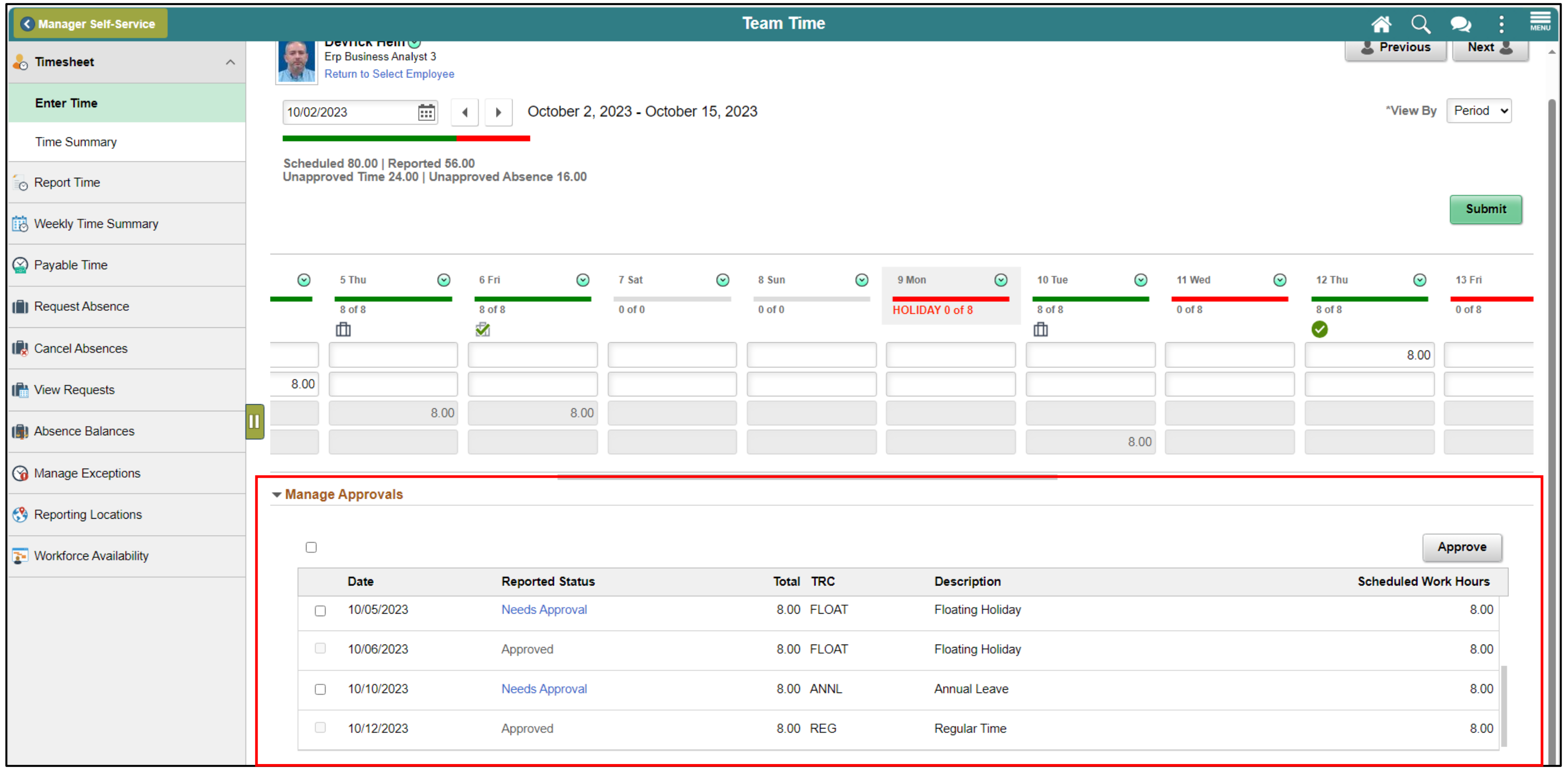
Note: Additional fields may be required on the timesheet based on the timesheet the department or employee uses. If additional fields are required, enter the applicable information before Selecting **Submit.** Once the Manager submits the time on behalf of the employee, the reported time is automatically approved.

Lecture 2: Enter Time on behalf of Employee Continued

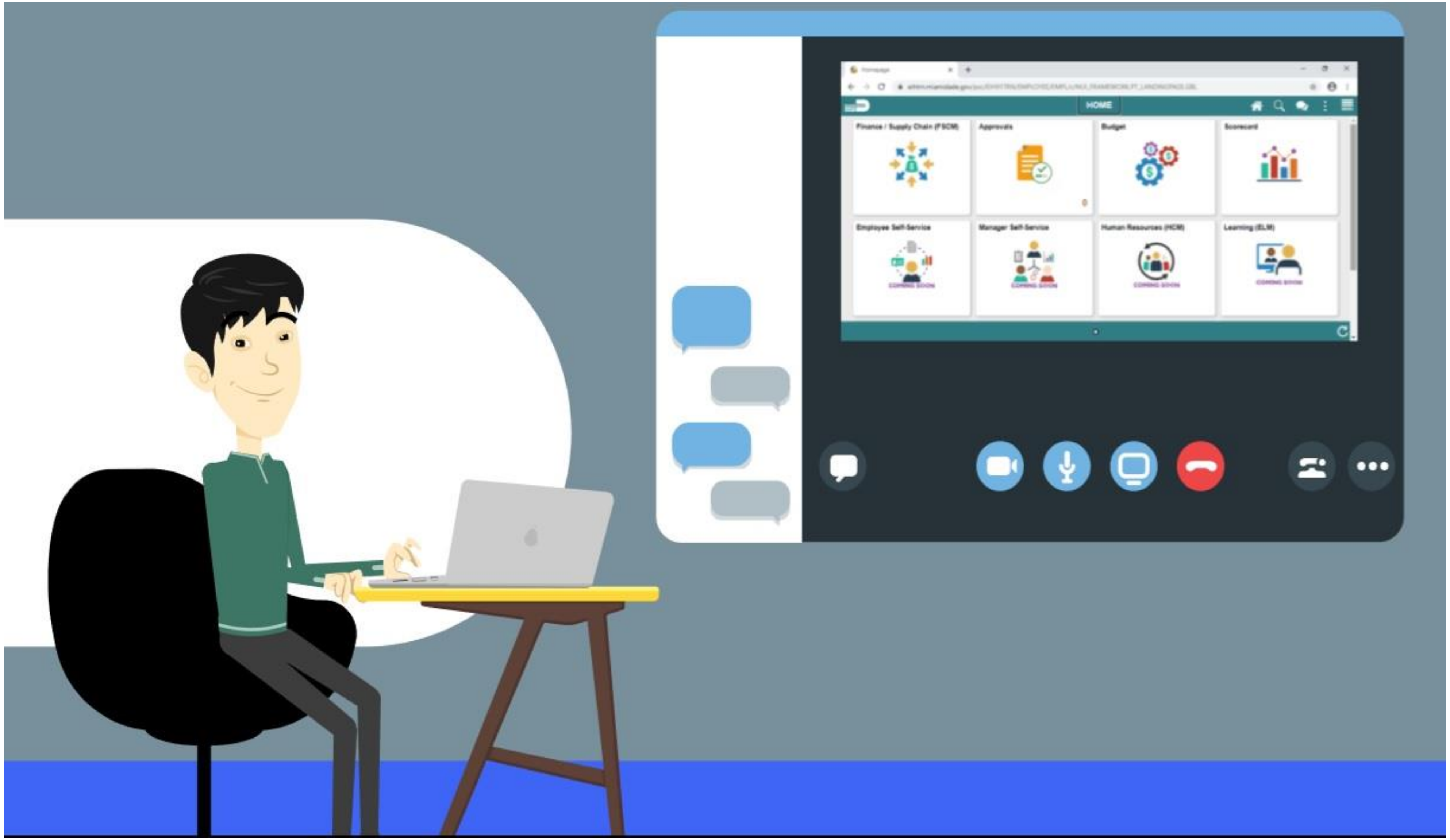
9. In the **Manager Approvals** section, the **Reported Time Status** will display:

- **Date:** The date for which the time was submitted.
- **Reported Status:** The status of the time that was submitted.
- **Total:** The total number of hours submitted for each TRC for the day.
- **TRC** (Time Reporting Code): The time reporting code associated with the status.
- **Description:** The description of the time reporting code.

Note: you can also approve time / absence in this section.



Lesson 4: Activities and Exercises



Lesson 4: Lesson Summary

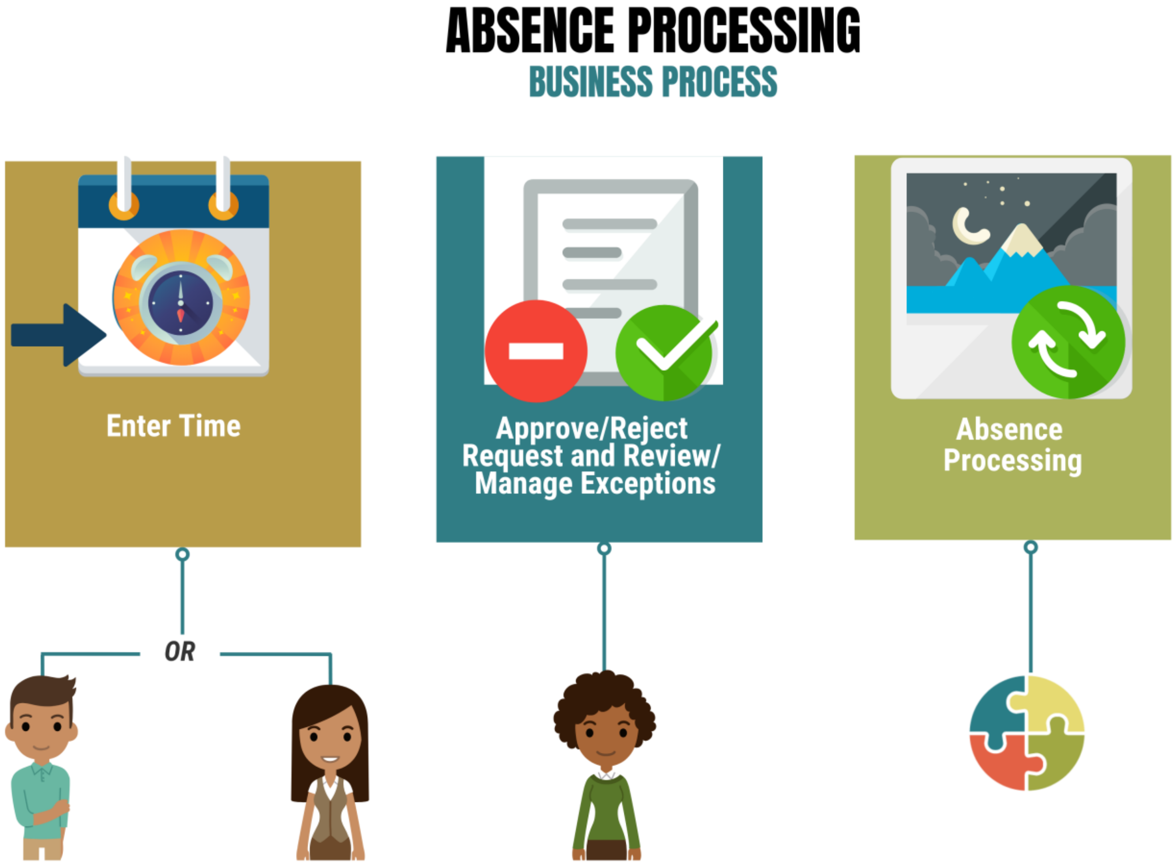
Now that you have completed the Enter Time on Behalf of Employee lesson, you should be able to:

- 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 an Employee

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

Lesson 5: Submit Absence on behalf of an Employee Continued



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.

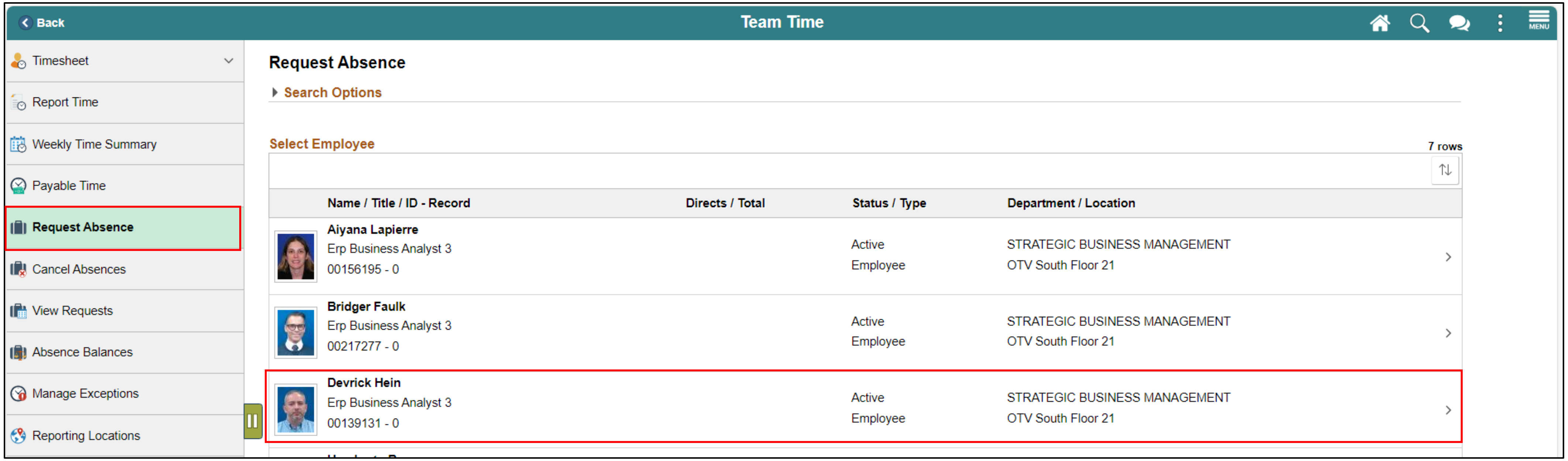
Lesson 5: Key Terms

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.

Lecture 1: Submit Absence on behalf of an Employee

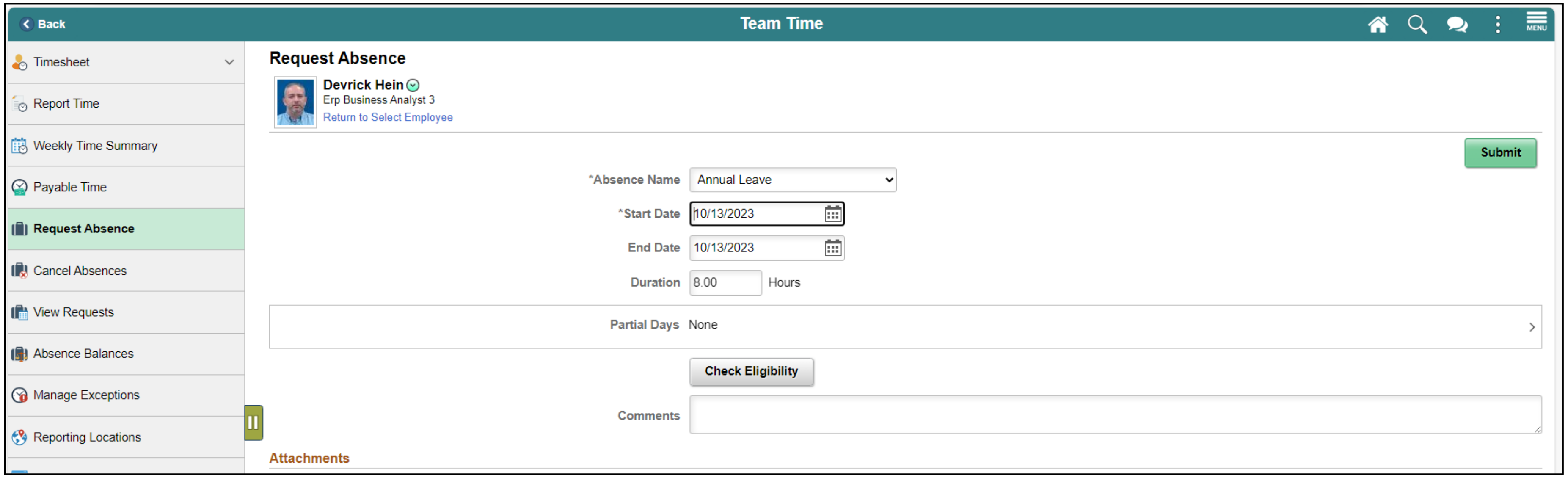
The following steps outline how the Manager can submit an absence request on behalf of the employee if the employee is unable to report it.

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



Lecture 1: Submit Absence on behalf of an Employee Continued

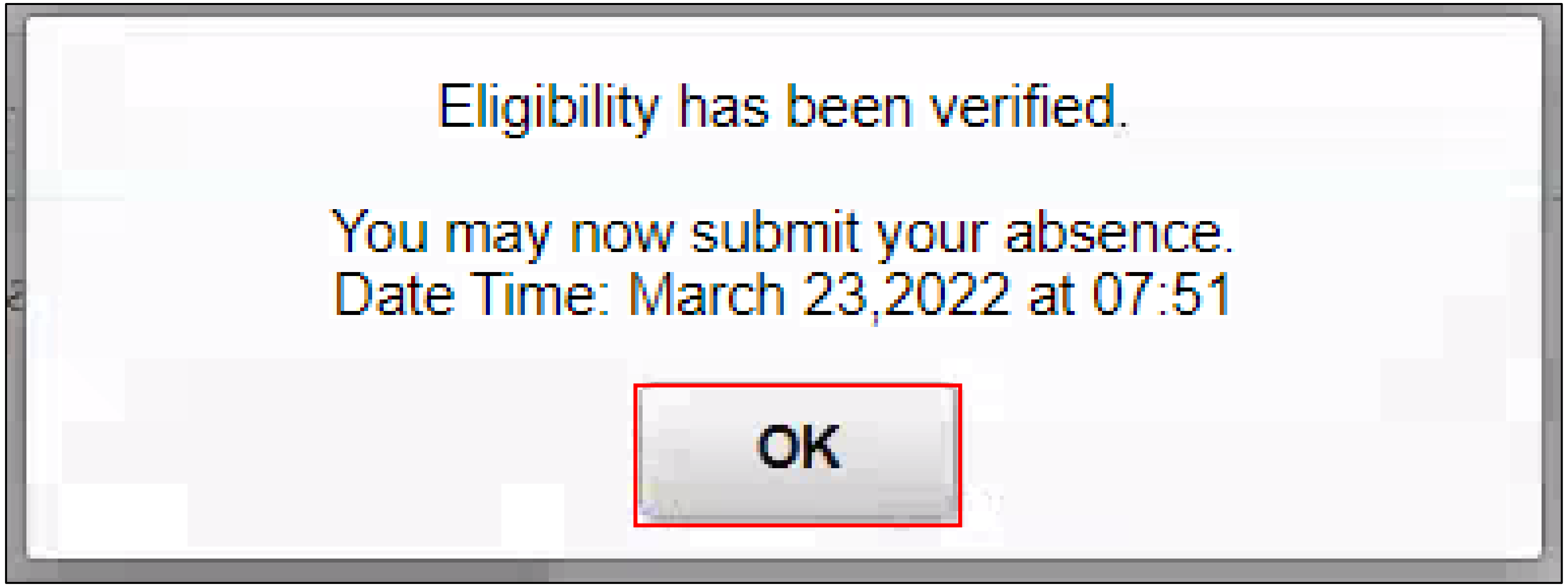
3. Populate the absence request form.
   - Absence Name
   - Start Date
   - End Data
   - Duration



Note: Different absence type in the Absence Name field will require additional information. Partial leave can also be requested.

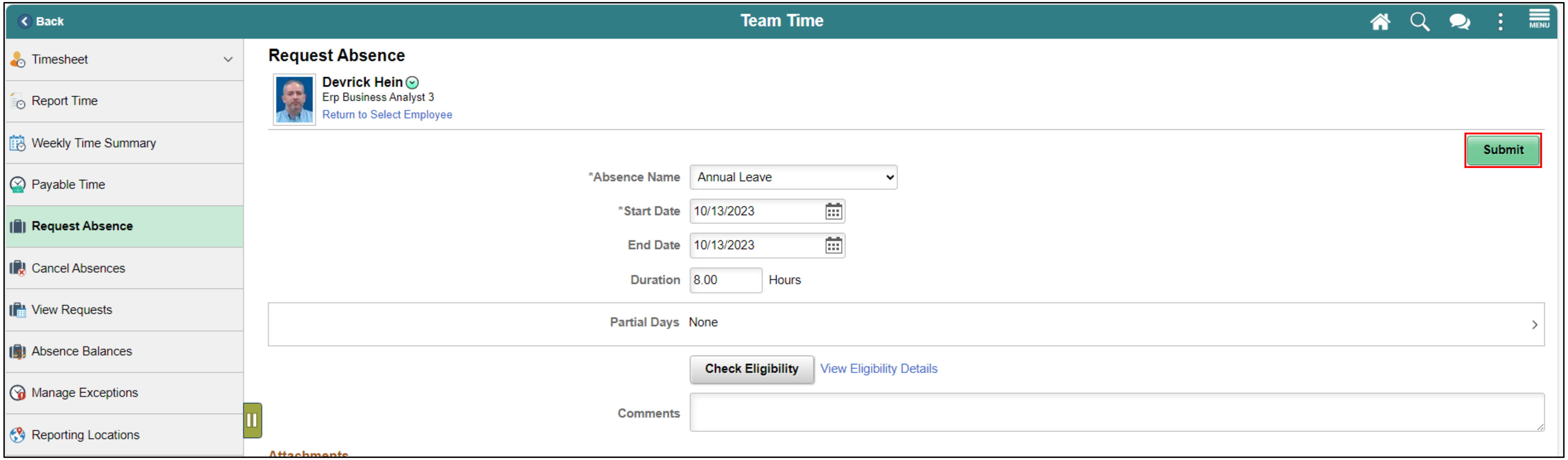
Lecture 1: Submit Absence on behalf of an Employee Continued

4. Select **Check Eligibility** to check employee's available balance and eligibility of the selected absence, then select **OK**.



Lecture 1: Submit Absence on behalf of an Employee Continued

5. Review the absence details and Select **Submit**.



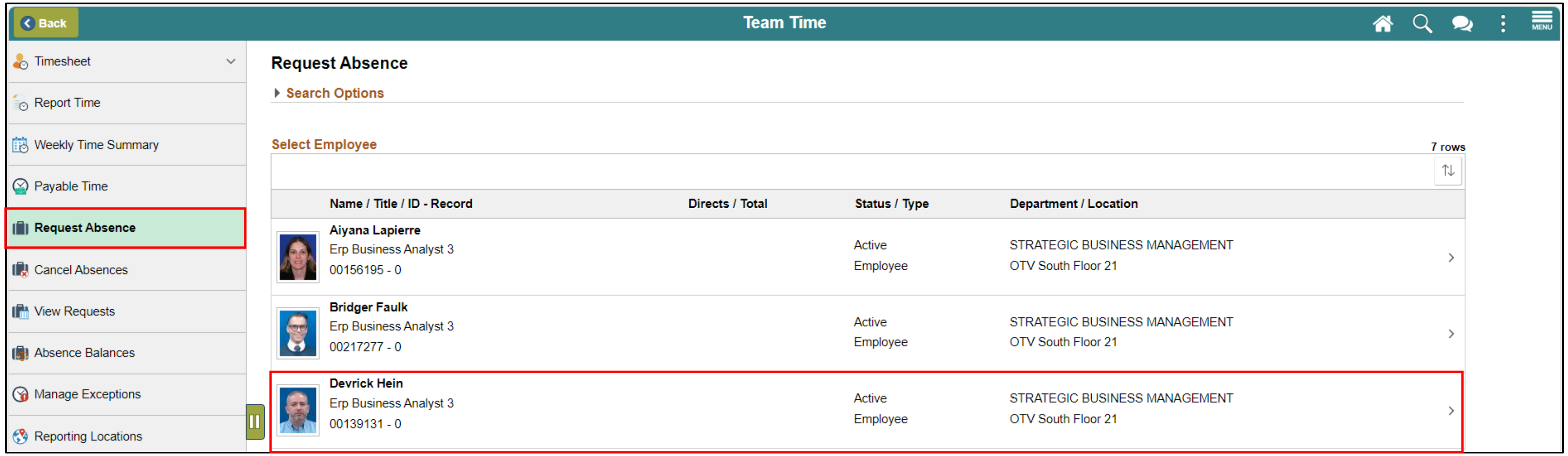
Lecture 1: Submit Absence on behalf of an Employee Continued

6. Select **Yes** once prompted.

Lecture 2: Submit Partial Absence on behalf of an Employee

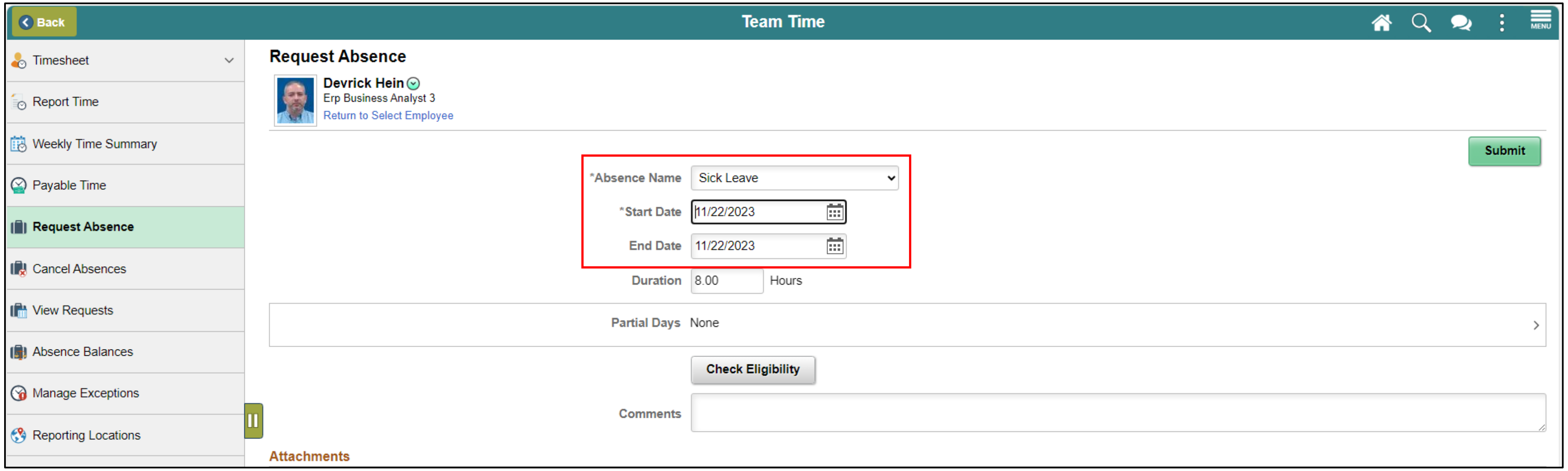
The following steps outline how the Manager can submit a partial absence request on behalf of the employee if the employee is unable to request it.

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



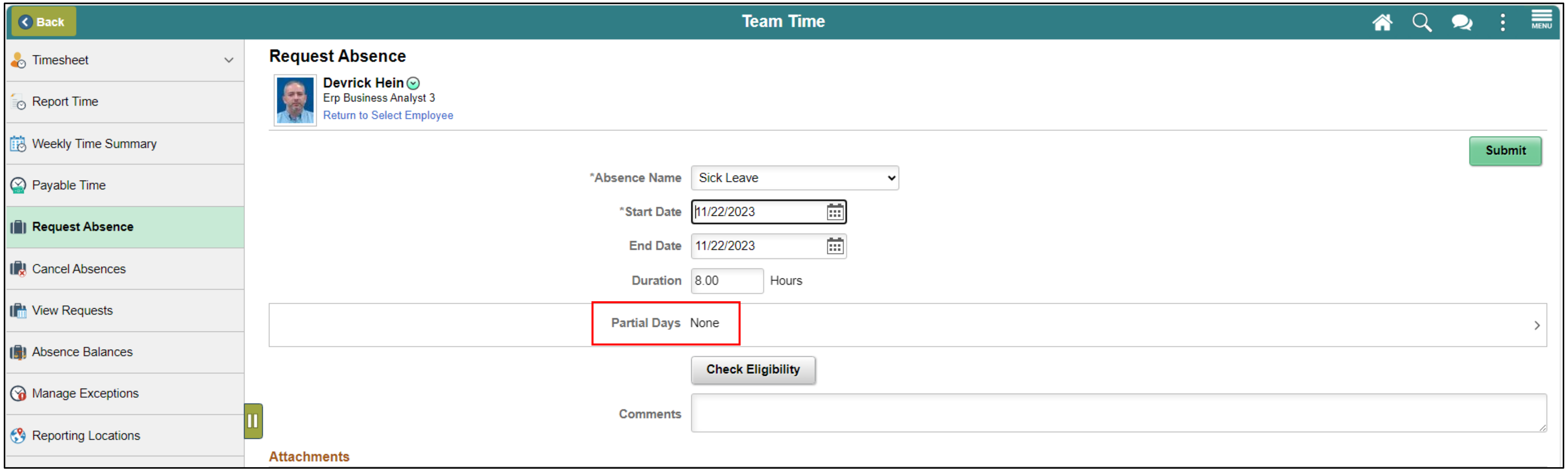
Lecture 2: Submit Partial Absence on behalf of an Employee Continued

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



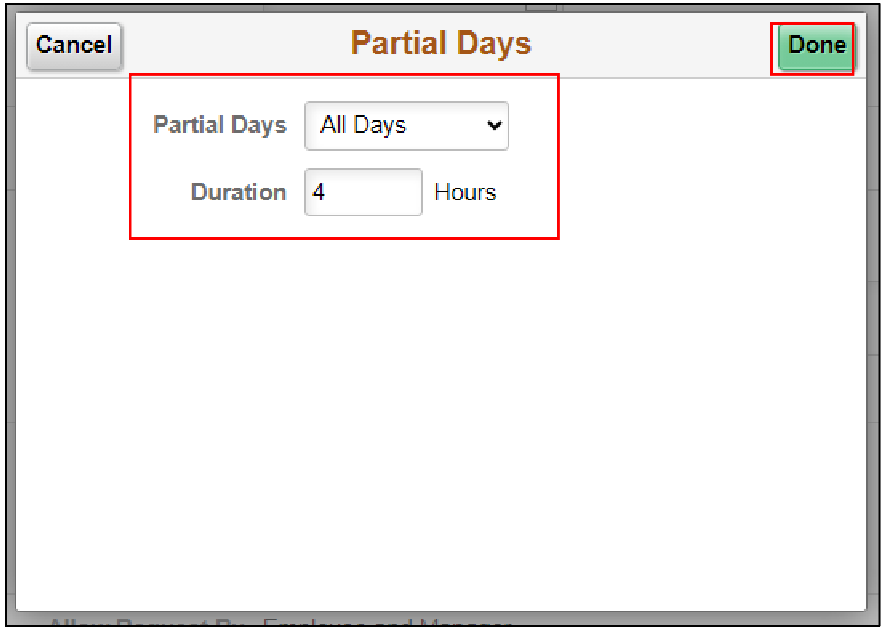
Lecture 2: Submit Partial Absence on behalf of an Employee Continued

4. Select **Partial Days**.



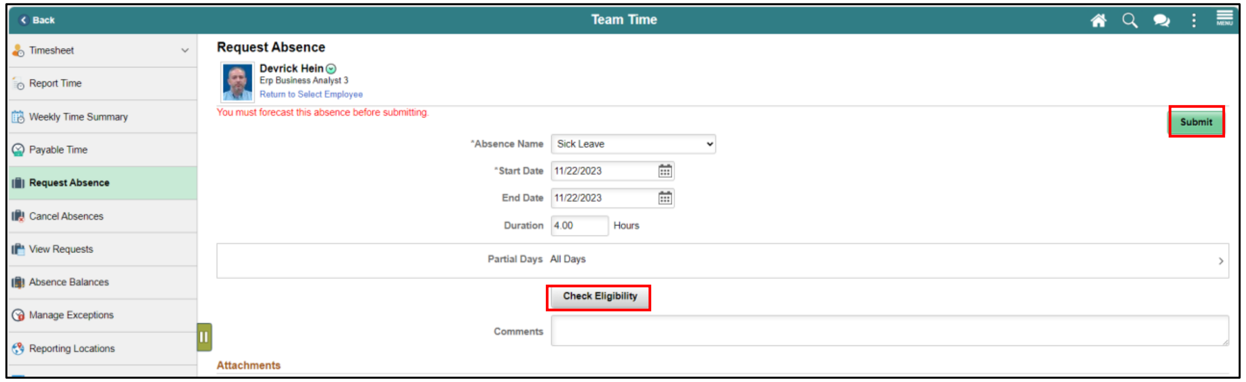
Lecture 2: Submit Partial Absence on behalf of an Employee Continued

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**.



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

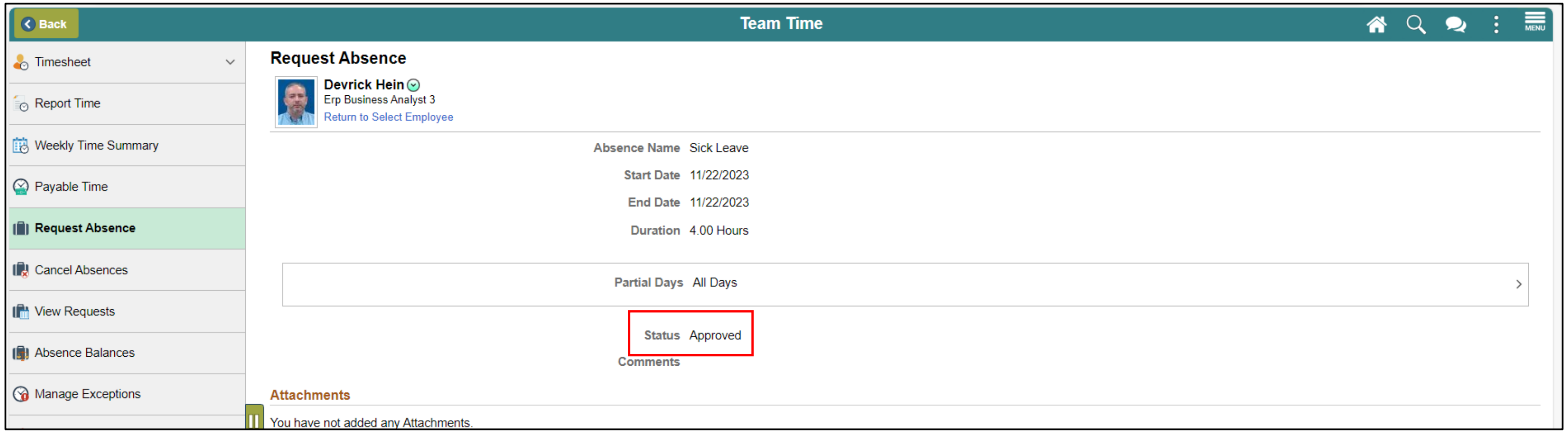
6. Select **Check Eligibility** and then **Submit** once eligibility has been verified.



7. Select **Yes** once prompted.

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

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

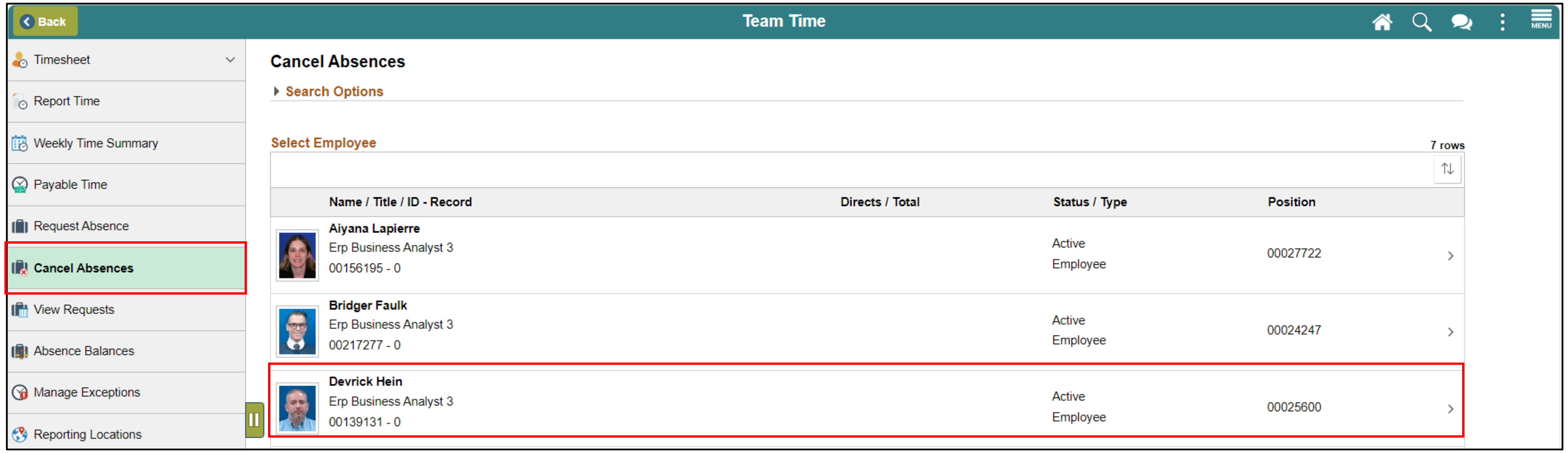


Lecture 3: Cancel Absence on behalf of an Employee

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.

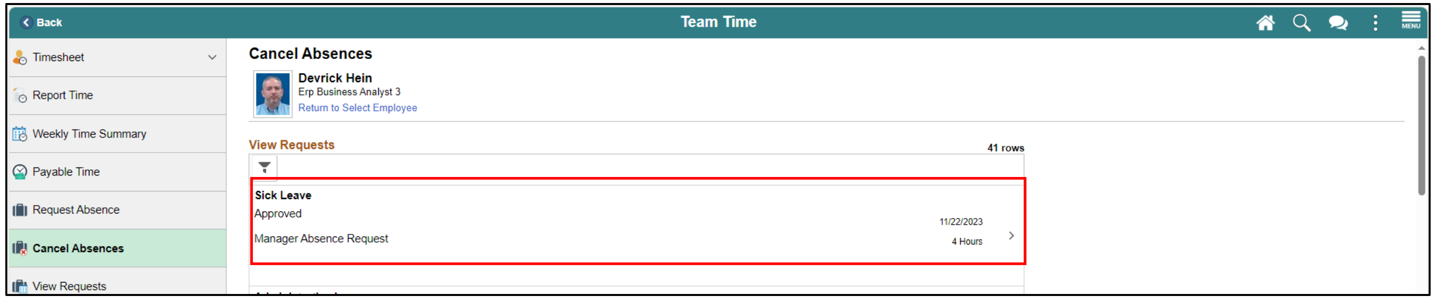
1. Navigation: **Homepage > Manager Self-Service > Team Time > Cancel Absence**

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

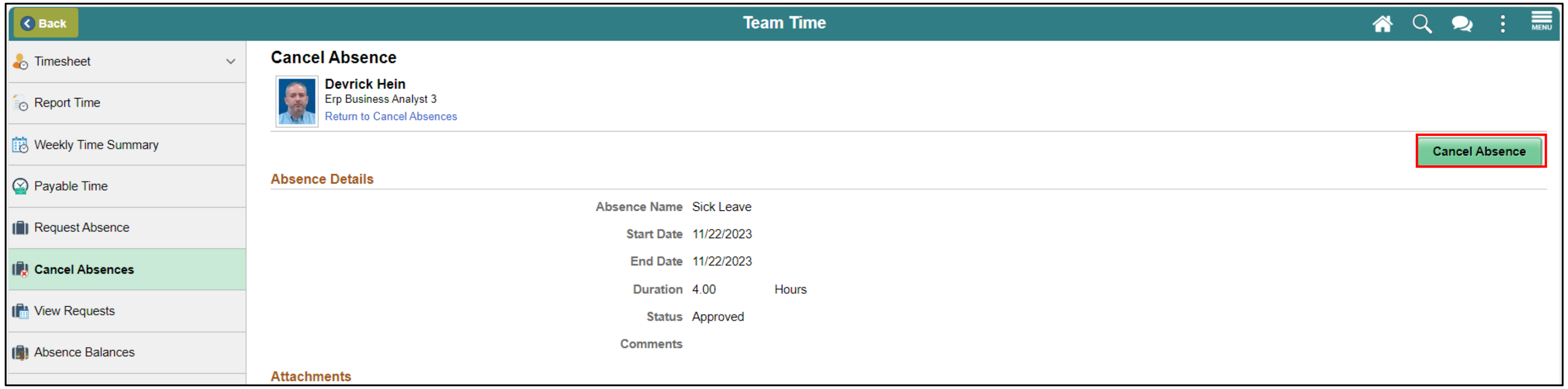


Lecture 3: Cancel Absence on behalf of an Employee Continued

3. Select the Absence Request.



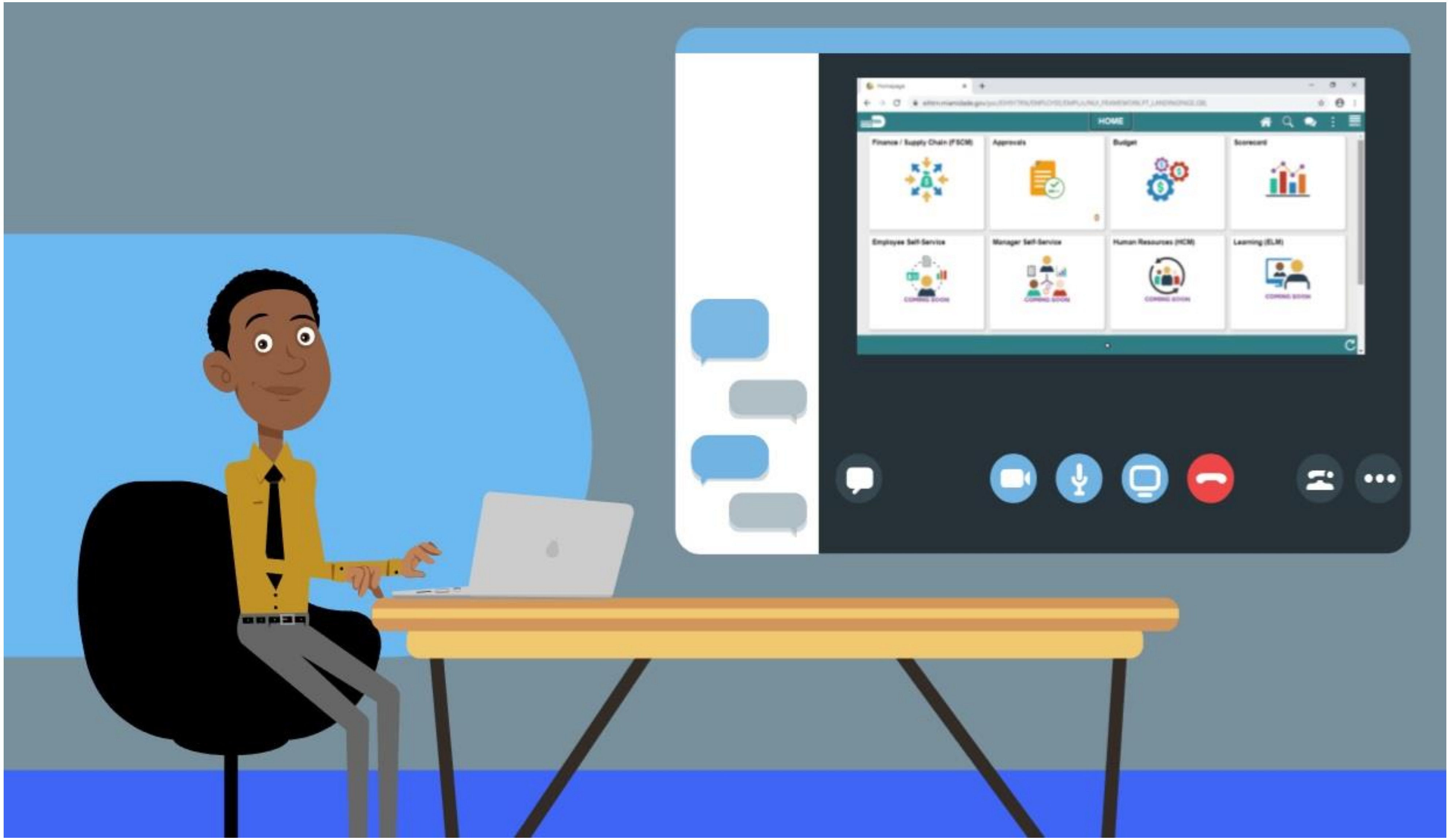
4. Select the **Cancel Absence** button.



Lecture 3: Cancel Absence on behalf of an Employee Continued

5. Select Yes when prompted.

Lesson 5: Activities and Exercises



Lesson 5: Lesson Summary

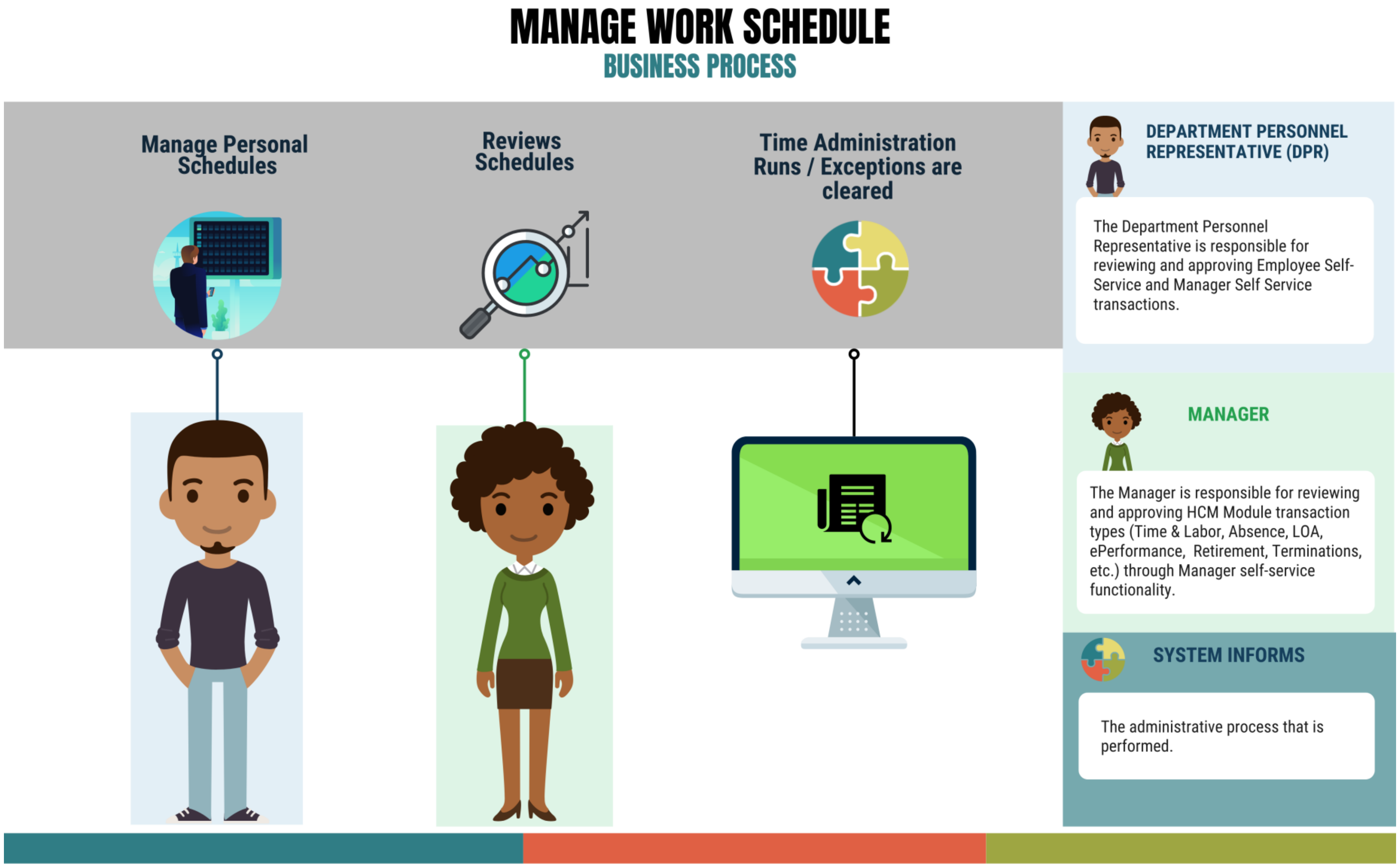
Now that you have completed the Submit Absence on Behalf of Employee lesson, you should be able to:

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

Lesson 6: Manage Work Schedule

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

Lesson 6: Manage Work Schedule Continued



Lesson 6: Key Terms

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

Lecture 1: Overview of Schedules

Overview of Schedules

- Work schedules are being implemented to validate time and absence
- Elapsed Schedule is the only schedule that could be assigned to an employee
- Schedules are maintained to validate time and absence entries

Lecture 1: Overview of Schedules Continued

The following are important changes to note that occur due to this implementation:

- The following are important changes that occur due to 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, personal schedules are configured in INFORMS.
    - In order to assign a personal schedule, a new schedule must be created.
  - Manager will create a personal schedule for employees.

Lecture 1: Overview of Schedules Continued

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

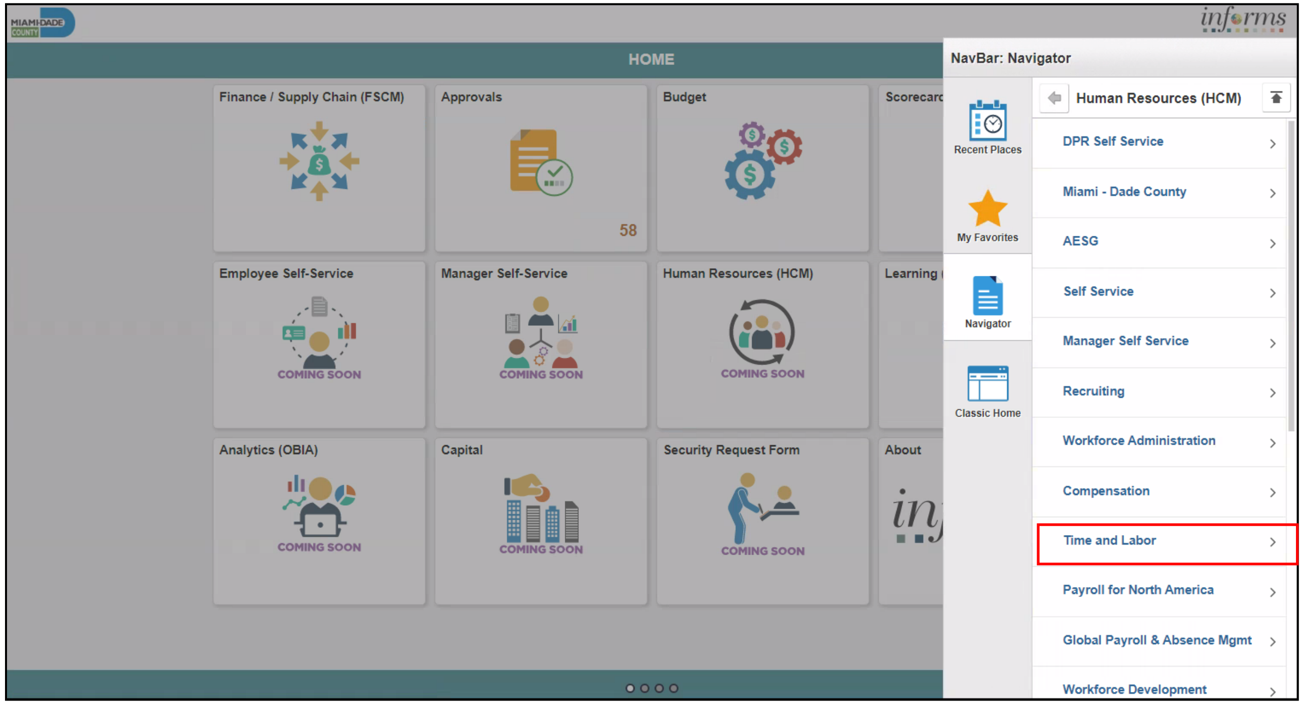
Lecture 1: Overview of Schedules Continued

- Schedules need to be assigned or changed for employees in the following scenarios:
  - An employee is hired and becomes active for the first time
  - An employee is rehired
  - Active employee has change in the expected daily hours or workdays

Lecture 2: Personal Schedules

<u>Assigning a Personal Schedule:</u>

1. NavBar Navigation: **Human Resources (HCM) > Time and Labor > Enroll Time Reporters > Assign Work Schedule**.
2. In the **Assign Work Schedule** page, search for an employee.
3. Select **Search**.



Lecture 2: Personal Schedules Continued

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

Search Results

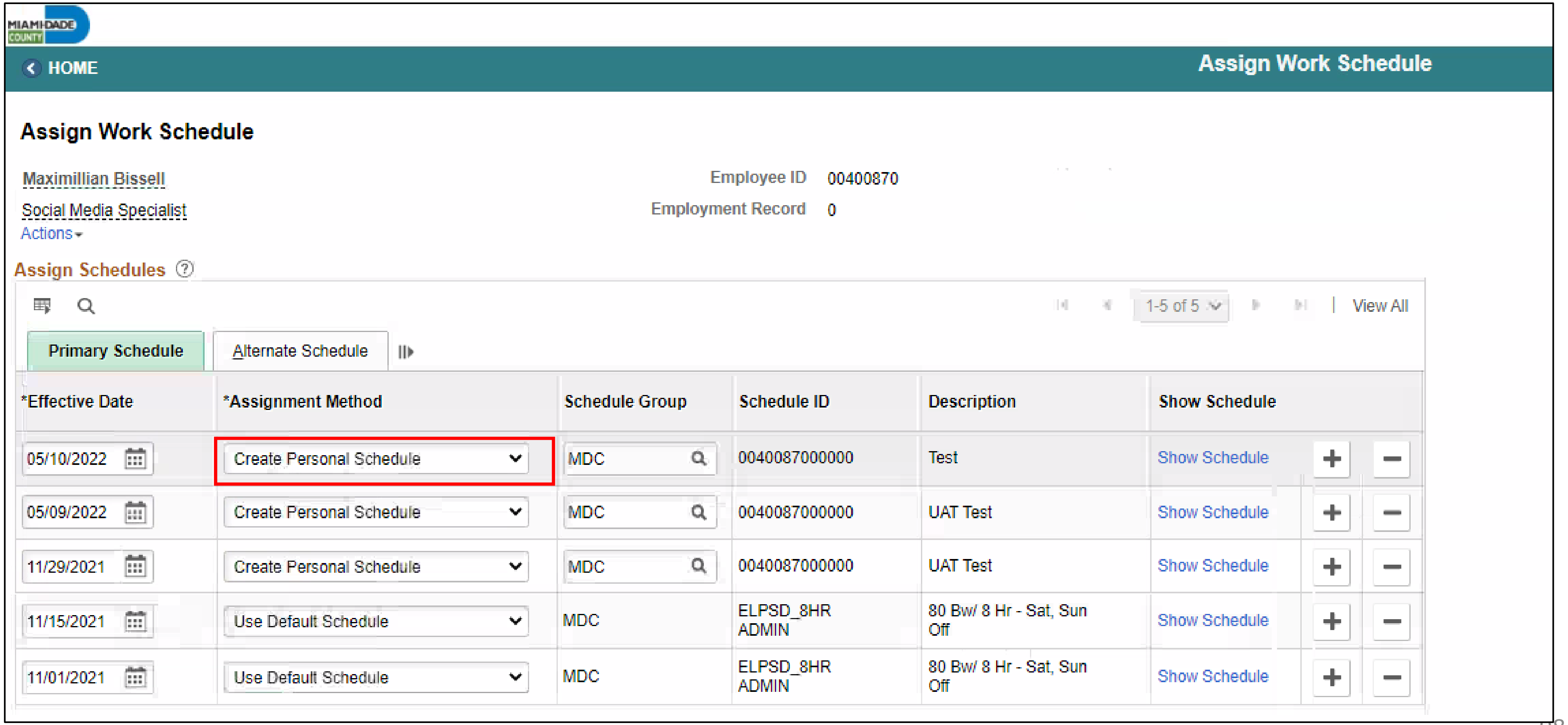
Only the first 300 results can be displayed.

View All — 1-100 of 300

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

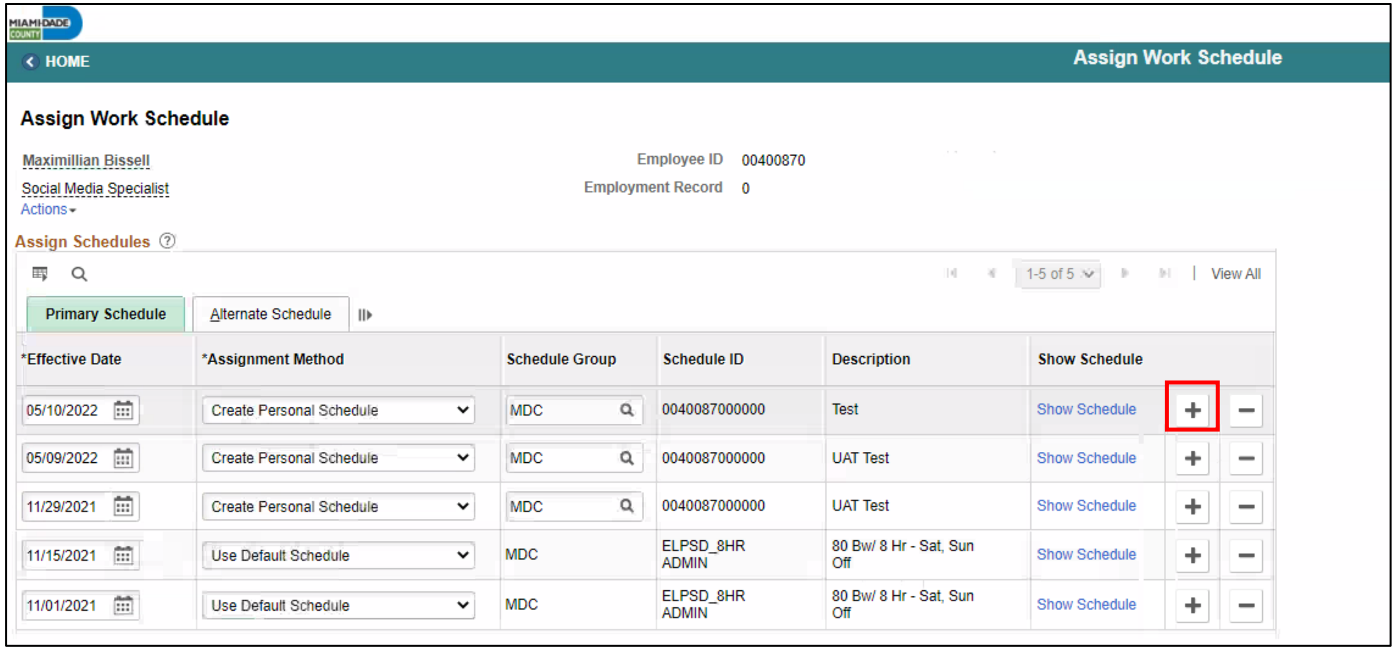
Lecture 2: Personal Schedules Continued

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 .



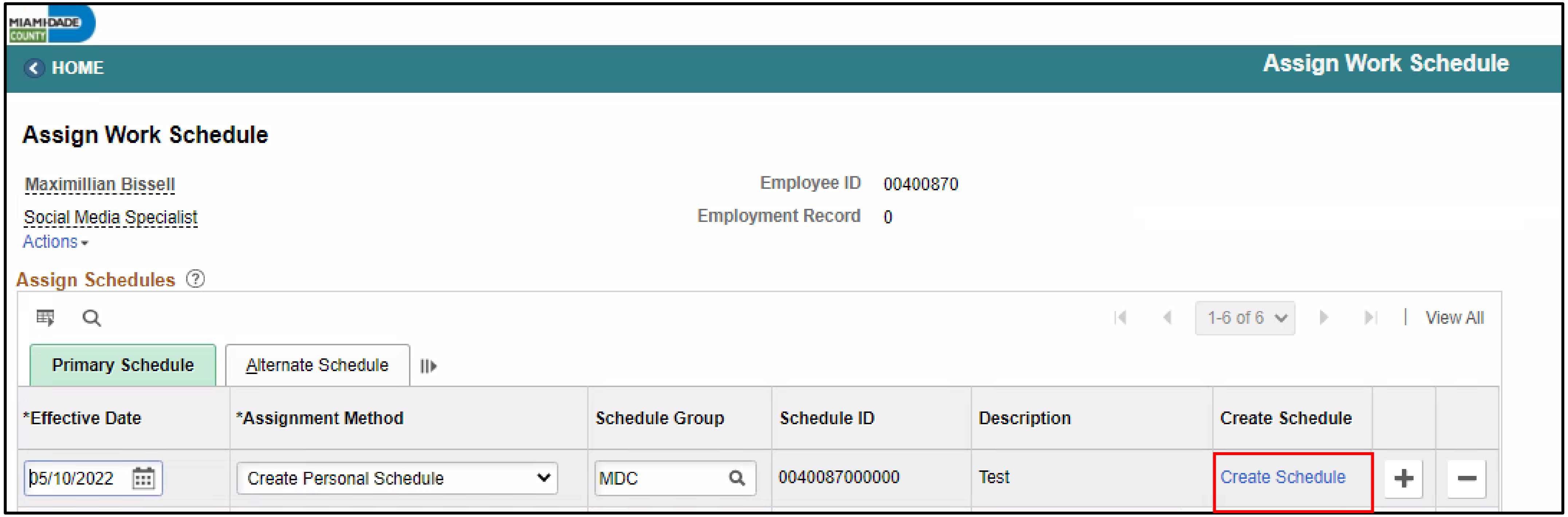
Lecture 2: Personal Schedules Continued

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



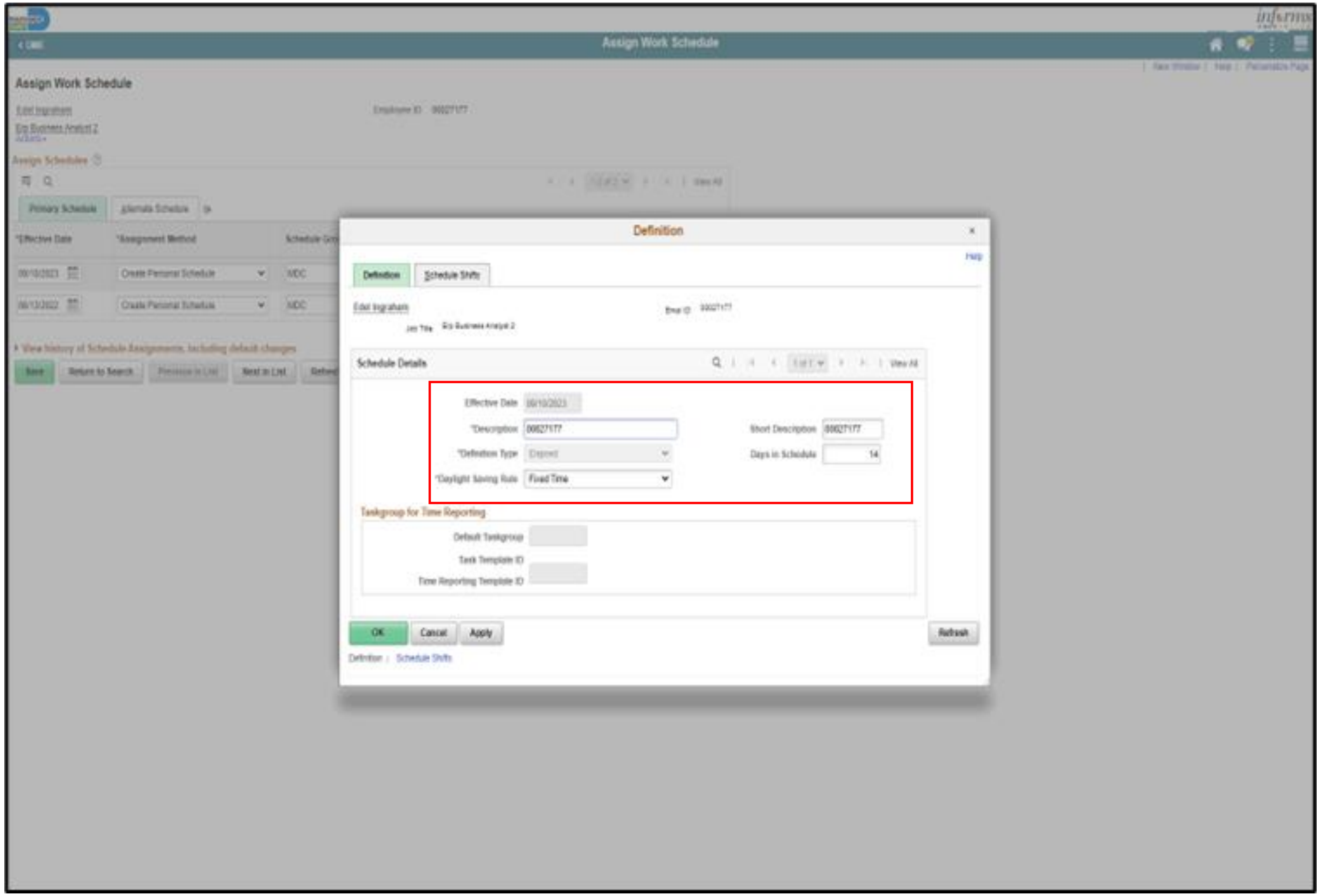
Lecture 2: Personal Schedules Continued

8. Select **Create Schedule**



Lecture 2: Personal Schedules Continued

9. View and update the Schedule Details for the employee

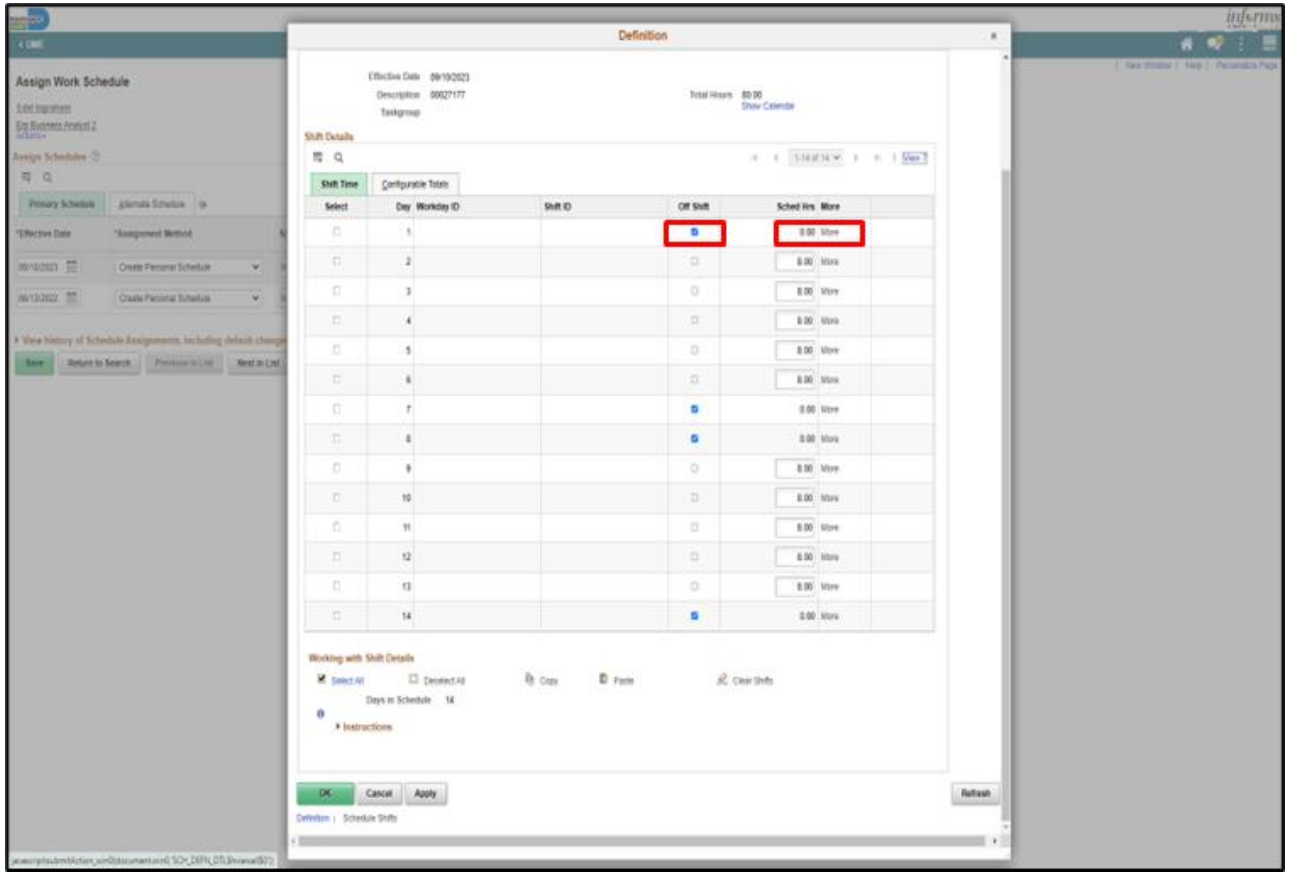


The following are required fields (*) that must be updated prior to selecting **OK**:

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

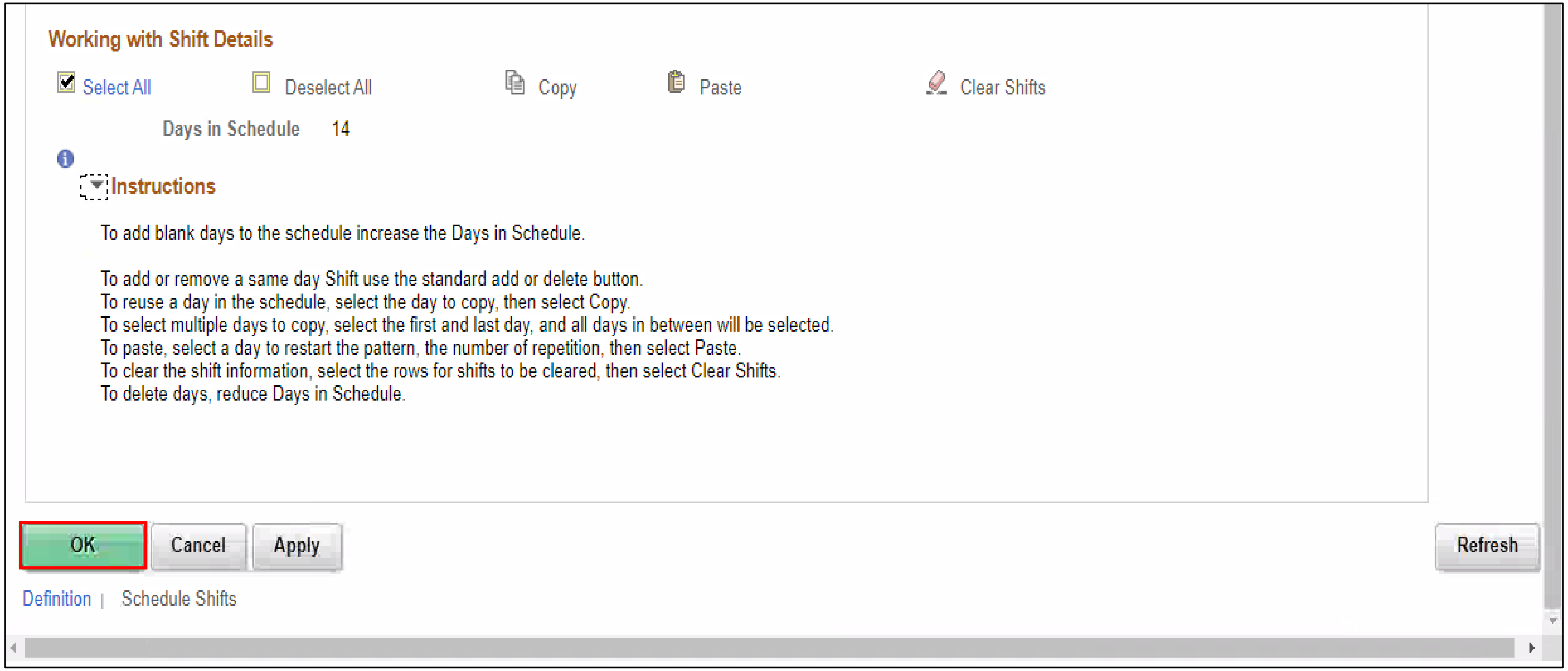
Lecture 2: Personal Schedules Continued

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



Lecture 2: Personal Schedules Continued

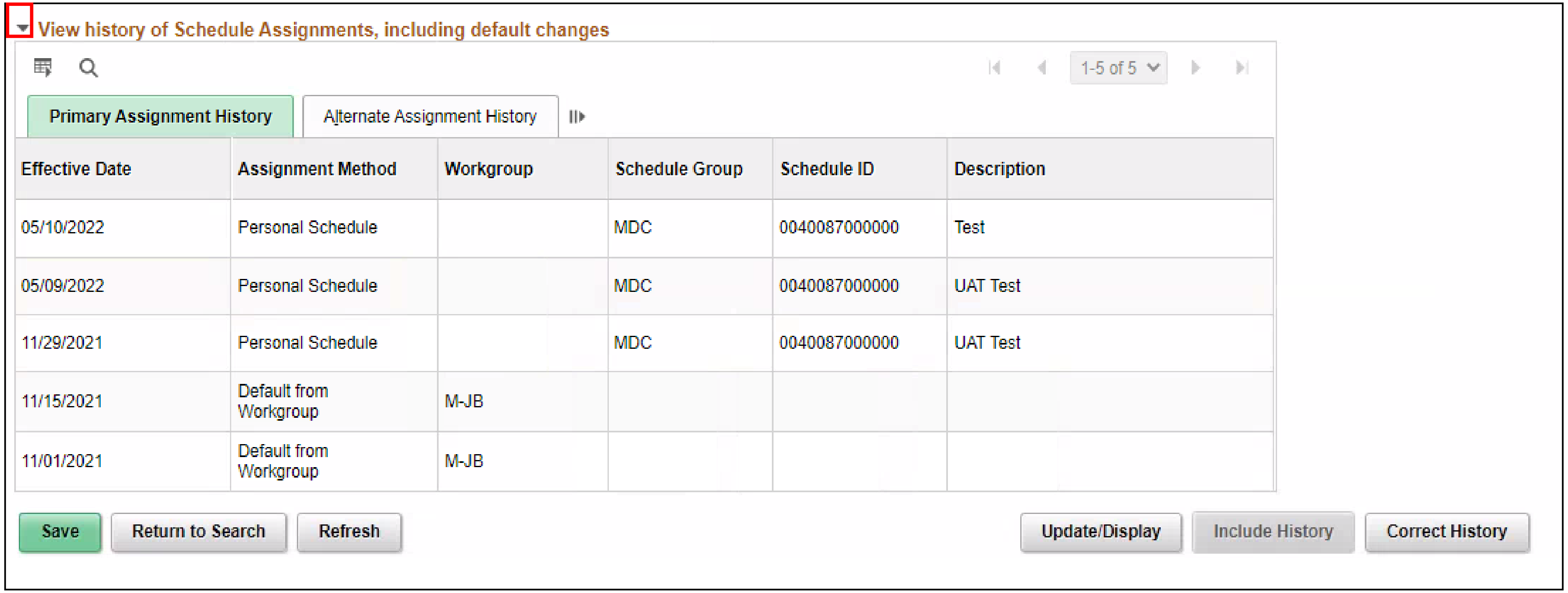
11. Additional instructions are provided at the bottom of this page. Select **OK**.



Lecture 2: Personal Schedules Continued

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.

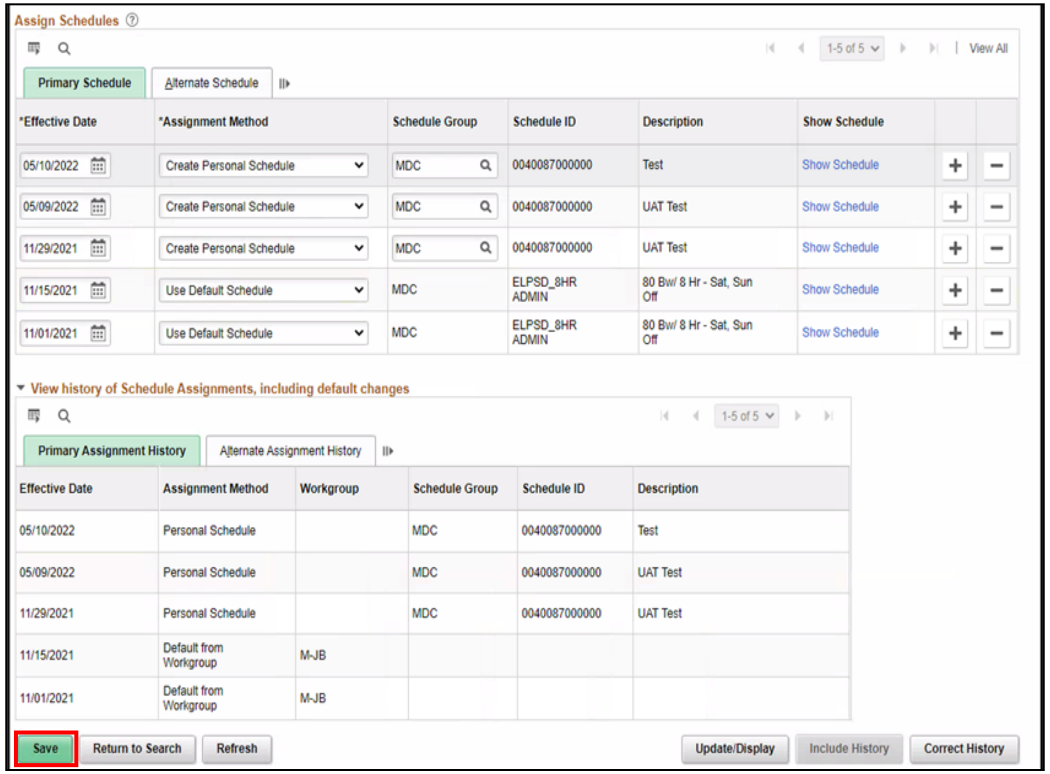


Effective Date	Assignment Method	Workgroup	Schedule Group	Schedule ID	Description
05/10/2022	Personal Schedule		MDC	0040087000000	Test
05/09/2022	Personal Schedule		MDC	0040087000000	UAT Test
11/29/2021	Personal Schedule		MDC	0040087000000	UAT Test
11/15/2021	Default from Workgroup	M-JB			
11/01/2021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

Lecture 2: Personal Schedules Continued

Personal Schedule

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.



Assign Schedules

1-5 of 5 | View All

Primary Schedule | Alternate Schedule

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

View history of Schedule Assignments, including default changes

1-5 of 5

Primary Assignment History | Alternate Assignment History

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

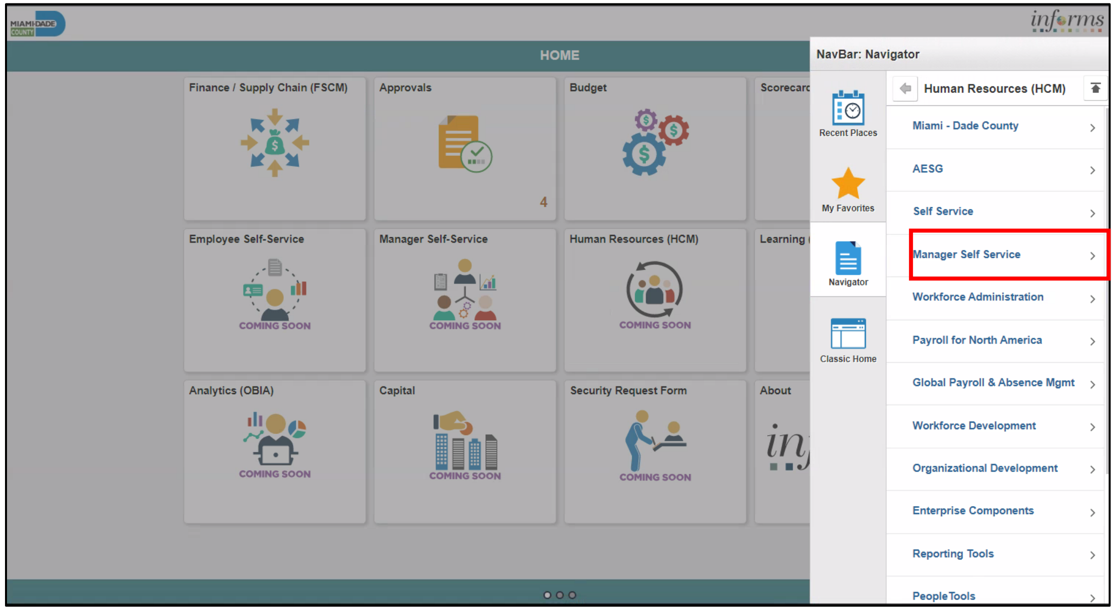
Save | Return to Search | Refresh | Update/Display | Include History | Correct History

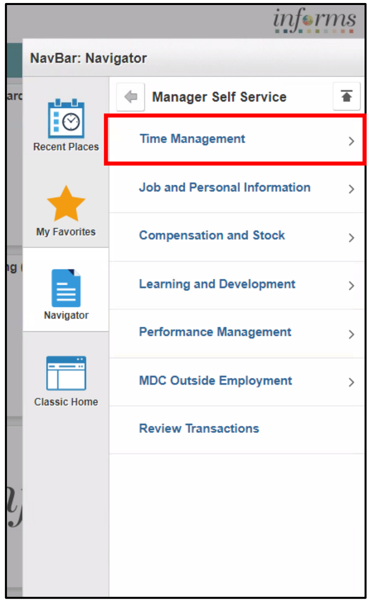
Lecture 3: Manage Schedules

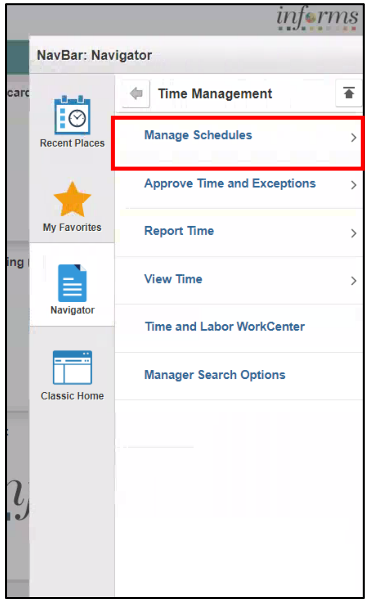
Manage Schedules

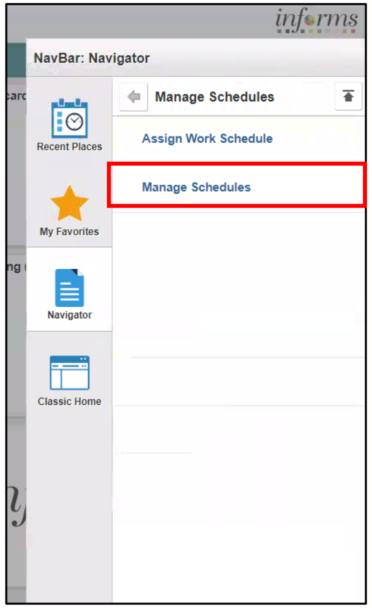
Overriding an Employee's Schedule for a Temporary Situation.

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









Lecture 3: Manage Schedules Continued

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, select the employee.

Lecture 3: Manage Schedules Continued

Manage Schedules

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

Schedule Detail | Demographics

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
☑	Hunt	Don	00185051	0 Hours OFF	8 Hours	8 Hours	8 Hours	8 Hours	8 Hours

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

Legend

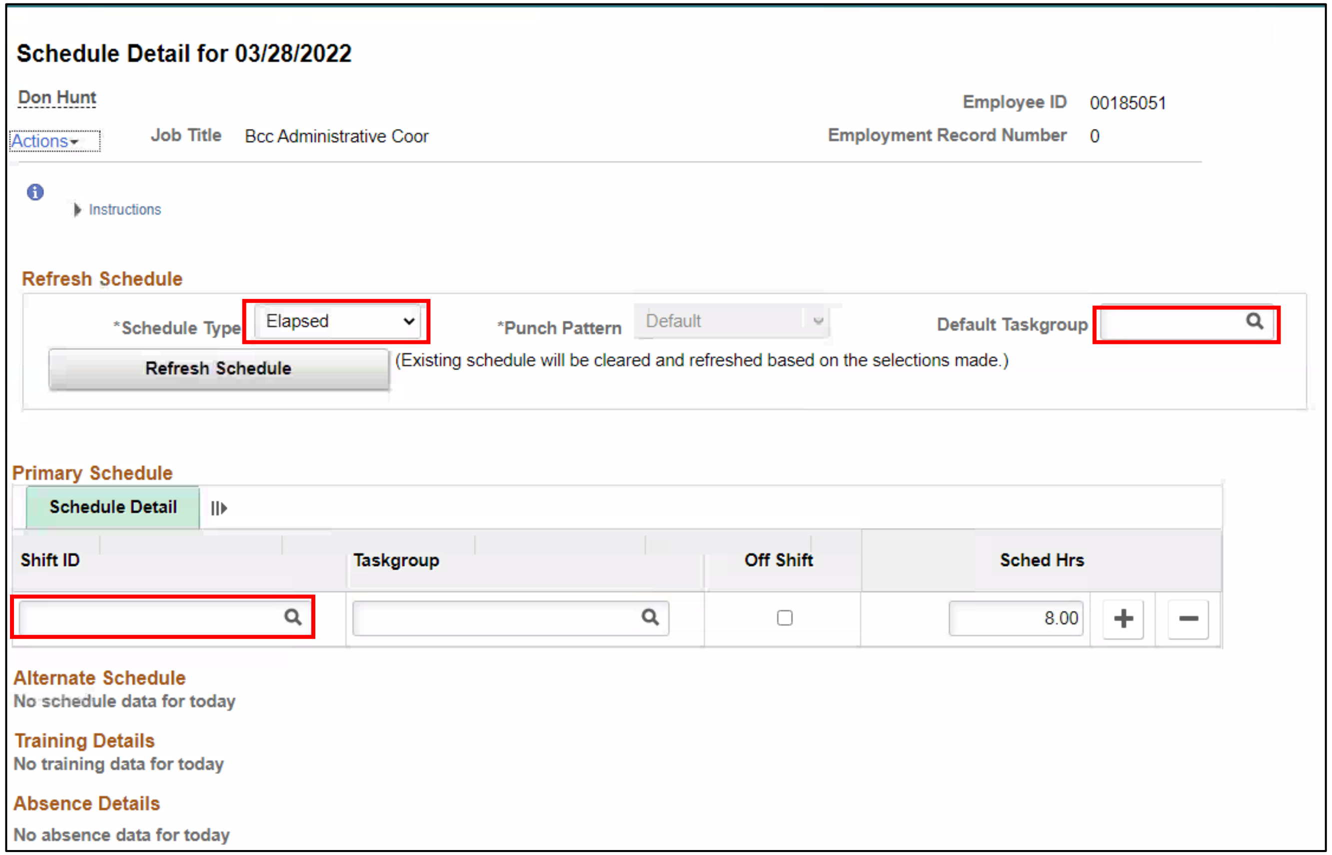
Approved Training	Planned Absence	Holiday	Multiple Shifts
Crossover Shift	Scheduled OFF Day	Replaced Employee	Shift has changing elements

Lecture 3: Manage Schedules Continued

<u>Manage Schedules</u>

- 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.**



Lecture 3: Manage Schedules Continued

<u>Manage Schedules</u>

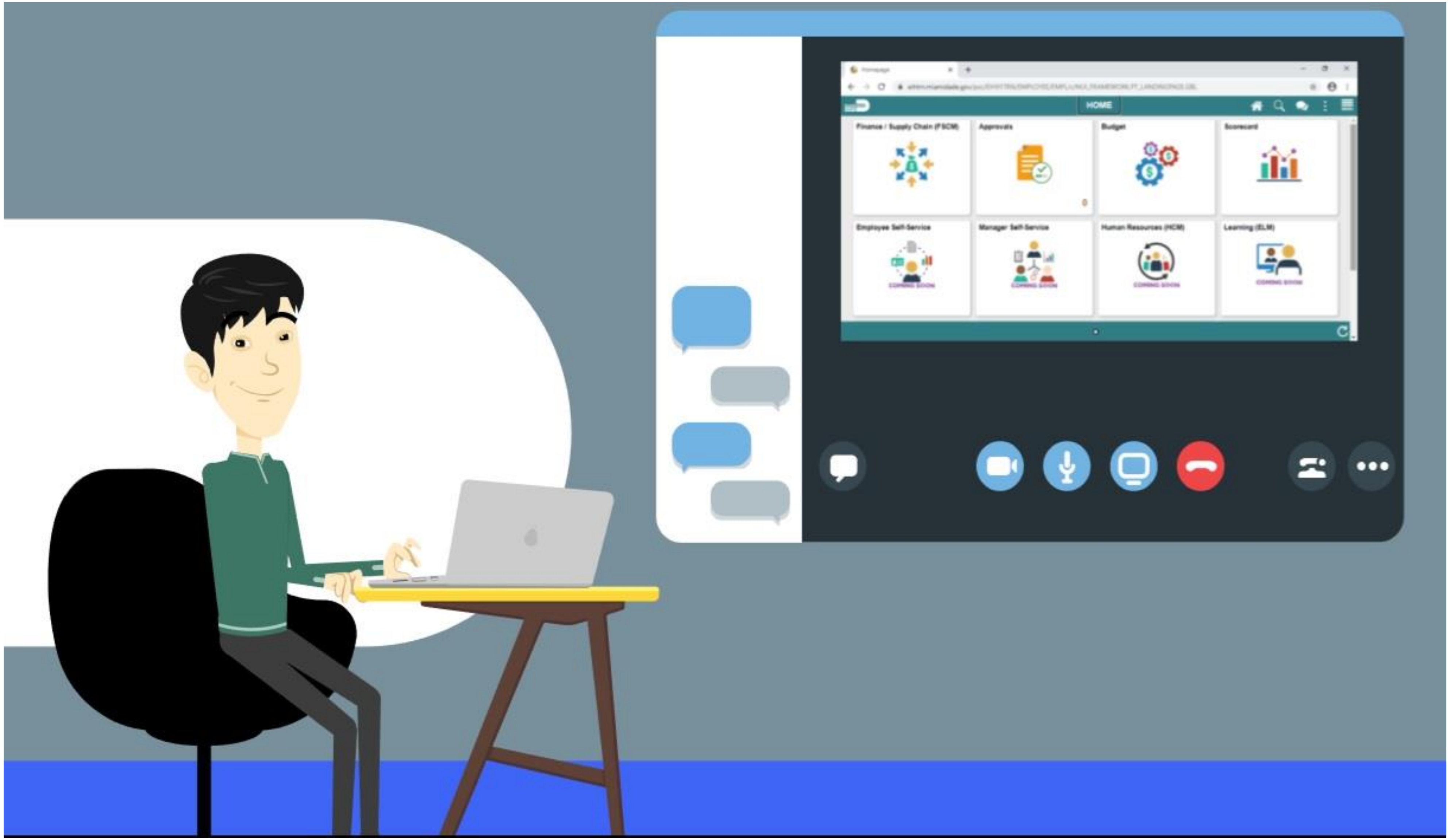
5. On the **Schedule Detail** page, review the Primary Schedule section.

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 schedule are now complete.

Lesson 6: Activities and Exercises



Lesson : Lesson Summary

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

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

Module 3: Course Summary

Module Topics
Course Content Summary
Additional Training and Job Aids
Course Summary

Course Content Summary

- Congratulations on completing the Overview of Time Management.
- You now understand how to:
  - Approve Time
  - Approve Absence
  - Manage Exceptions
  - Enter Time on Behalf of Employee
  - Submit Absence on Behalf of Employee
  - Manage Work Schedules

Additional Training and Job Aids

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 Absence (Approve Absence)
- Approve Absence (Push Back Absence)
- Approve Absence (View Absence Balance 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)

Job Aids

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

For additional information, be sure to visit: www.miamidade.gov/informs

Congratulations on successfully completing the **Time Management** course!

MSS 204 – Time Management