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Timesheet Maintenance

Learner Guide

Contents

Course Overview

This course is designed to provide manager and administrator users hands on practice with navigating, editing, and validating timesheets.

Audience

- Time Administrators

Objectives

- Access and navigate timesheets.

- Edit employee time entries for Start/End All Days and Bulk Hours timesheets.

- Validate time using reporting tabs and timesheet information.

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Lesson 1: Timesheet Overview

Timesheets

The timesheet is the source of truth for employees' worked time and how they are paid for that time.

Depending on company configuration, employees and managers can enter, adjust, review, and submit or approve employee's worked time and time off from the timesheet.

Timesheet Profile Types

There are two types of timesheet profiles available for configuration within a company.
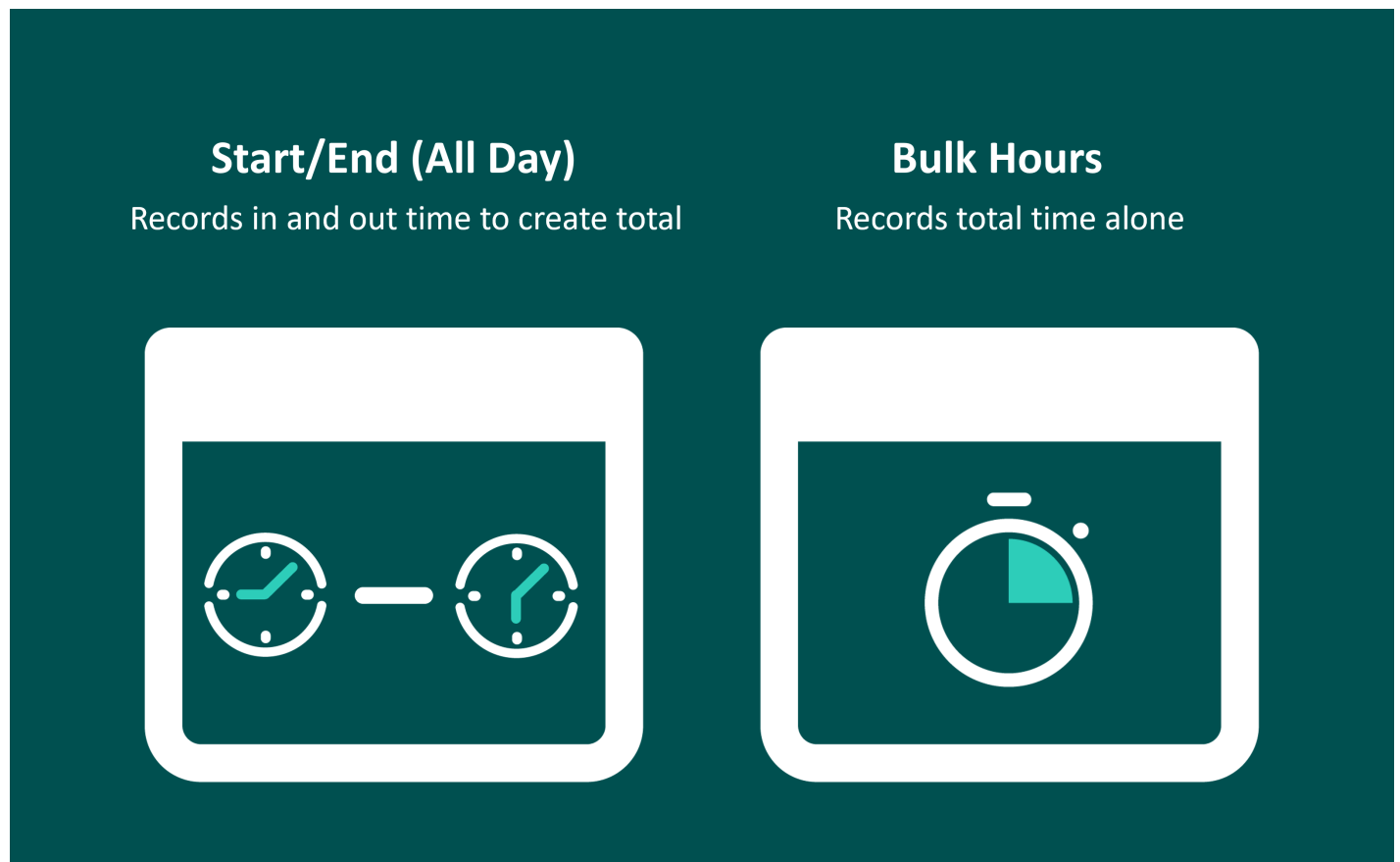
Start/End (All Days) timesheets allow you to enter start and end times in addition to bulk hours. This timesheet is typically used for hourly employees.

Bulk Hours timesheets allow you to enter bulk time entries without specifying start and end times. This timesheet is typically used for salaried employees.

Company Overview

You'll practice timesheet maintenance as Carlos Hudson, a manager at a regional athletic club.

Two of his employees are Alan Edwards and Ben Edwards. Alan uses a Start/End All Days timesheet and Ben is assigned a Bulk Hours timesheet.

The company uses a bi-weekly pay period.

Carlos will be reviewing and editing timesheets for the first pay period in March.
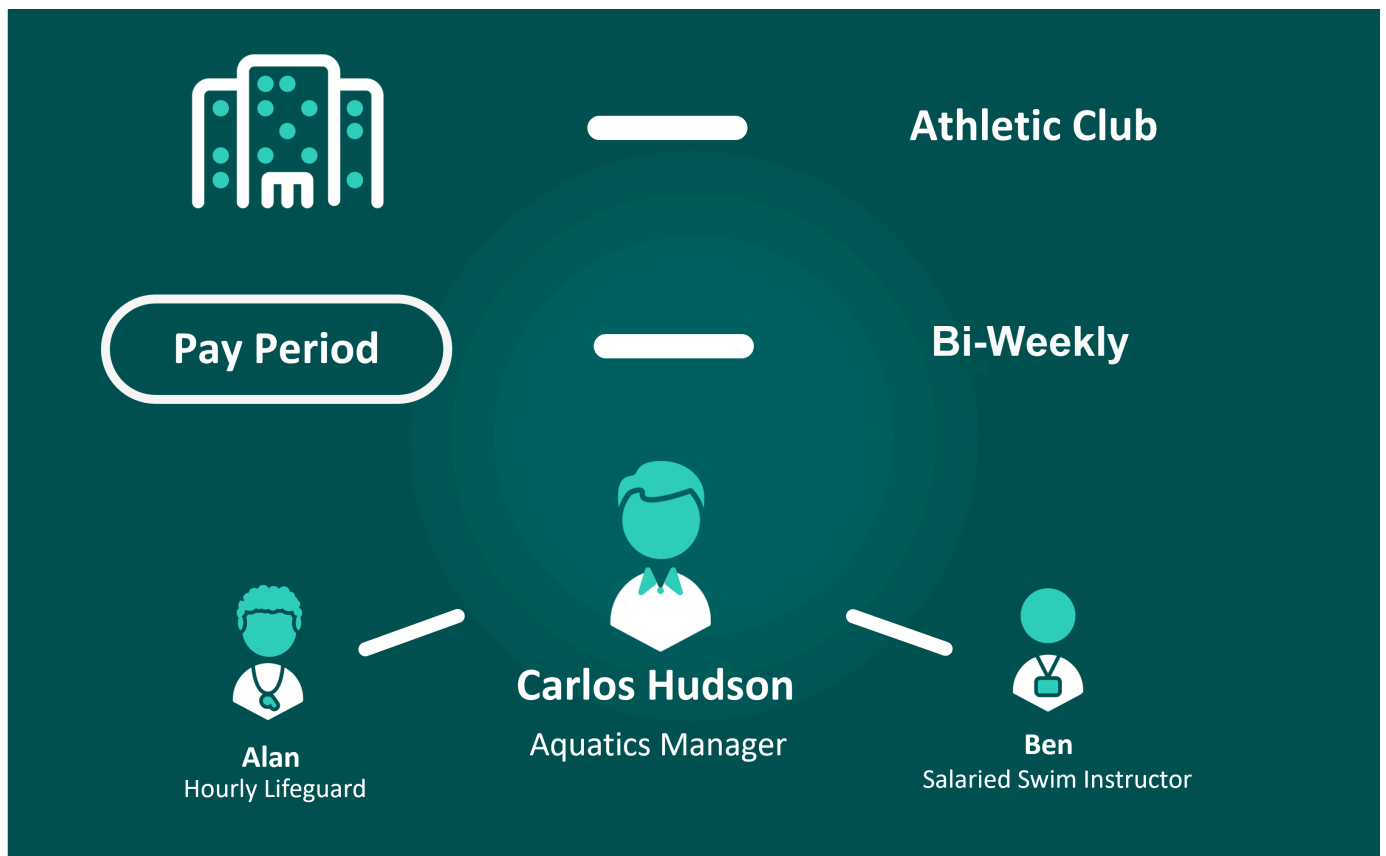
Lesson 2: Editing Time Entries

Add A Time Entry

Add new time entries to a Start/End (All Days) timesheet by adding a new row.

Sample Scenario:

Alan Edwards left early on the first Friday of the pay period because he was feeling ill. Edit his timesheet to reflect 4 hours of sick time for that day.

Navigation: Menu > **Team** > **Time** > **Timesheets** > **All Timesheets**

1. From the **All Timesheets** page, at the **Current View** field, select the applicable view from the **View By** menu.

   - **All Open**

2. Select the **Edit Timesheet** icon (pencil icon) for the applicable timesheet. The **Timesheet Edit** page for the selected timesheet appears.

   - **Alan Edwards, timesheet for the first pay period of March**

3. Select **Add Row** (plus icon) in the applicable date's row. A new row appears.

4. Enter the applicable time entry information.

   - **Raw Total Column: 4**

   - **Time Off Column: Sick**

5. Select **Save**.

Change Punch Interpretation

Use the Change Punch Interpretation button to quickly modify an In punch to an Out punch and vice versa directly from the timesheet.

Sample Scenario:

Alan forgot to punch out for lunch on the first Wednesday of the pay period. Modify his timesheet to reflect a lunch starting at 11:15 AM and ending at 12:15 PM.

Navigation: Menu > **Team** > **Time** > **Timesheets** > **All Timesheets**

1. From the **All Timesheets** page, at the **Current View** field, select the applicable view from the **View By** menu.

   - **All Open**

2. Select the **Edit Timesheet** icon (pencil icon) for the applicable timesheet. The **Timesheet Edit** page for the selected timesheet appears.

   - **Alan Edwards, timesheet for the first pay period of March**

3. From the **Timesheet Edit** page, locate the applicable time entry and select the associated **Change Punch In/Out Interpretation** (clock with left and right arrows). The punch time is now interpreted as the opposite of its original interpretation. This may also result in a new row for the date depending on other existing punches.

   - **Change Punch Out Interpretation, first Wednesday of the pay period, 03:05 pm**

   - **Change Punch In Interpretation, first Wednesday of the pay period, 03:05 pm**

   > **Note:**
   > To adjust this entry to the out time for the day and make room for lunch entries, you must select Change Punch In/Out Interpretation twice. This should result in two empty time entry fields for Lunch Out and Lunch In.

4. Enter the applicable time entries for any remaining empty fields on that date.

   - **11:15 am**

   - **12:15 pm**

5. Select **Save**.

Split Time Allocation

Use the Split Time Allocation feature to allocate time to more than one cost center for existing timesheet entries on the same day.

Sample Scenario:

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On the first Tuesday of the pay period, Alan worked in multiple cost centers. However, he did not change cost centers throughout the day, so all of his hours are only allocated to his default cost center. Split his time to allocate the hours to the appropriate cost centers.

Cost Center	Time In	Time Out
Lifeguard	6:55AM	9:00AM
Swim Instructor	9:00AM	1:30PM
Member Services Representative	1:30PM	3:15PM

Navigation: Menu > Team > Time > Timesheets > All Timesheets

1. From the **All Timesheets** page, select the **Current View** drop-down menu.

2. Select the applicable view from the **View By** menu.

   - **All Open**

3. Select the **Edit Timesheet** icon (pencil icon) for the applicable timesheet. The **Timesheet Edit** page for the selected timesheet appears.

   - **Alan Edwards, timesheet for the first pay period of March**

4. From the **Timesheet Edit** page, locate the applicable row, and select the **More Actions** ellipses.

   - **Tuesday**

5. Select **Split Time Allocation**.

6. At the **Cost Center** field, select **Browse**.

7. Select applicable cost center.

   - **Macon/Aquatics/Swim Instructor**

8. In the **Split At** field, enter the applicable time.

   - **9AM**

9. Select **OK**. A new row appears with the split time entry allocated to the new cost center.

10. Repeat Steps 2 - 6 as needed.

- **Macon/Member Services/Member Services Representative**

- **1:30PM**

11. Select **Save**.

Clear An Exception

You can clear an exception from the Manage Exceptions window or directly from the timesheet row.

Sample Scenario:

Alan volunteered to come in early on the first Thursday of the pay period. This resulted in an Early In exception for this day. Please remove this Early In exception from Alan's timesheet

Navigation: Menu > **Team** > **Time** > **Timesheets** > **All Timesheets**

1. From the **All Timesheets** page, at the **Current View** field, select the applicable view from the **View By** menu.

- **All Open**

2. Select the **Edit Timesheet** icon (pencil icon) for the applicable timesheet. The **Timesheet Edit** page for the selected timesheet appears.

- **Alan Edwards, timesheet for the first pay period of March**

3. From the **Timesheet Edit** page, locate the applicable row and select the **More Actions** ellipses (...).

- **Thursday**

4. Select **Manage Exceptions**. The **Manage Exceptions** window appears.

5. In the **Calculated Exceptions** section, locate the applicable selections, and select **Delete**. The exception appears as " **cleared**."

- **Early In**

6. Select **OK**.

> **Note:**
> Exceptions may also be cleared by selecting **Delete** in the timesheet row associated with the applicable exception.

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Activity: Edit Time Entries

At the end of the pay period, Carlos is editing employee timesheets to prepare them for review and submission.

Sample Scenario:

Review the following criteria and make the necessary modifications to Alan's timesheet for the second week of the pay period.

- Alan covered a shift for his coworker in Member Services on the second Thursday of the pay period at 1:30PM. As a result, he worked past his scheduled shift end. Clear Alan's exception for Thursday and allocate his work time to the appropriate cost centers.

- On the second Friday of the pay period, Alan left three hours early to pick up his daughter from school. Ensure three hours of unpaid time off has been applied to Alan's timesheet.

Add A Time Entry (Bulk Hours)

Add new time entries to a Bulk Hours timesheet by adding a new row.

Sample Scenario:

Another employee, Ben Edwards, was out sick all day the first Thursday and Friday of the pay period. Please edit Ben's timesheet to reflect this sick time.

Navigation: Menu > Team > Time > Timesheets > All Timesheets

1. From the **All Timesheets** page, at the **Current View** field, select the applicable view from the **View By** menu.

   - **All Open**

2. Select the **Edit Timesheet** icon (pencil icon) for the applicable timesheet. The **Timesheet Edit** page for the selected timesheet appears.

   - **Ben Edwards, timesheet for the first pay period of March**

3. (Optional) Select **+ Add Row**. A blank time entry row appears.

4. In the blank row, enter the applicable time entry criteria.

- **Time Off**: **Sick**

- **Thursday**: **8**

- **Friday**: **8**

> **Note:**
> Delete the hours in the original time entry row for Thursday and Friday.

5. Select **Save**.

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Lesson 3: Validating Time

Timesheet Calculated Tabs

Timesheet calculated tabs provide detailed reports for raw and calculated time in relation to time entry criteria such as counters, cost centers, shift premiums and more. They can be used as quick reference to validate timesheet data and reduce errors.

- **Calc Detail: Displays raw and calculated time.**

- **Calc. Summary: Displays total hours allocated to each counter.**

- **Counters: Displays the total hours per counter and cost center per day.**

- **Summary By Day: Displays total hours per day by counter.**

Activity: Validate Time

Use the Timesheet reporting tabs as a reference to validate timesheet data.

Sample Scenario:

Alan Edward's timesheet for the first pay period in March needs to be reviewed and approved. However, as the manager or administrator, there are some outstanding questions that must be answered to ensure the accuracy of his time.

1. Does the timesheet have any incomplete entries or missed punches? If so, how many and when do they occur?

2. Did Alan have any overtime this pay period? How much and what day(s) did he hit overtime?

3. How many exceptions did Alan trigger this pay period? Are there any patterns that might be worth looking into?

4. How many total regular hours did Alan work this pay period? Does this seem accurate?

5. Were there any days that he worked in cost centers other than his default cost center?

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Activity Solutions

Activity: Edit Time Entries

At the end of the pay period, Carlos is editing employee timesheets to prepare them for review and submission.

Sample Scenario:

Review the following criteria and make the necessary modifications to Alan's timesheet for the second week of the pay period.

- Alan covered a shift for his coworker in Member Services on the second Thursday of the pay period at 1:30PM. As a result, he worked past his scheduled shift end. Clear Alan's exception for Thursday and allocate his work time to the appropriate cost centers.

- On the second Friday of the pay period, Alan left three hours early to pick up his daughter from school. Ensure three hours of unpaid time off has been applied to Alan's timesheet.

Part 1 Solution

1. From the **All Timesheets** page, at the **Current View** drop down menu, select **View By**.

2. Select **All Open**.

3. Select the **Edit Timesheet** icon for Alan's timesheet for the first pay period in March.

4. From the **Timesheet Edit** page, locate the time entry row for the second Thursday of the pay period and select the **More Actions** ellipses.

5. Select **Split Time Allocation**.

6. At the **Cost Center** field, select **Browse**.

7. Select the **Macon/Aquatics/Member Services Representative** cost center.

8. At the **Split At** field, enter 1:30PM.

9. From the **Timesheet Edit** page, locate the time entry row for the second Thursday of the pay period and select the **More Actions** ellipses.

10. Select **Manage Exceptions**.

11. In the **Calculated Exceptions** section, locate the **Late Out** exception, and select the **Delete** icon.

12. Select **OK**.

13. Select **Save**.

Part 2 Solution

1. From the **Timesheet Edit** page, locate the time entry row for the second Friday of the pay period.

2. Select the **Add Row** icon (plus icon).

3. In the **Raw Total** field, enter 3.

4. In the **Time Off** drop-down menu, select **Comp Time**.

5. Select **Save**.

Activity: Validate Time

Use the Timesheet reporting tabs as a reference to validate timesheet data.

Sample Scenario:

Alan Edward's timesheet for the first pay period in March needs to be reviewed and approved. However, as the manager or administrator, there are some outstanding questions that must be answered to ensure the accuracy of his time.

1. Does the timesheet have any incomplete entries or missed punches? If so, how many and when do they occur?

   a. No, Alan did not have any incomplete time entries or missed punches. Summary By Day tab.

2. Did Alan have any overtime this pay period? How much and what day(s) did he hit overtime?

   a. Yes, Alan hit 0.25 overtime hours on the second Friday of the pay period. Counter, Calc Detail, and Summary by Day tab.

3. How many exceptions did Alan trigger this pay period? Are there any patterns that might be worth looking into?

   a. Alan triggered 7 exceptions this pay period. There may be a pattern of clocking out late that should be looked into. Calc Detail tab.

4. How many total regular hours did Alan work this pay period? Does this seem accurate?

   a. Alan worked 74.75 total regular hours. Calc Summary tab and Summary By Day tab.

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5. Were there any days that he worked in cost centers other than his default cost center?

   a. Yes, Alan worked in cost centers other than his default on the first Tuesday and second Thursday of the pay period. Counters tab and Calc Detail tab.