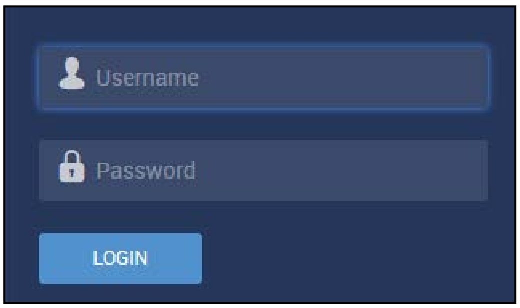
Department Manager Common Tasks

As a manager, you can perform various tasks within this application. The Department Manager Common Tasks job aid will help you navigate through multiple tasks so that you will be able to log on, review employee requests and view and report on employee data using the available tools.

Logging on

1. Access the log on screen.
2. In the **Username** field, enter your assigned user name.
3. In the **Password** field, enter your password.
4. Click **Login**.

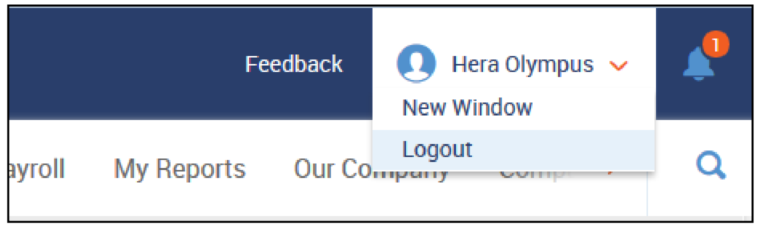
- Your Username and initial Password will be provided to you. You may be asked to change your Password when you first log on to the application.



Logging off

1. Click on your name in the upper-right corner and select **Logout**.
2. You are returned to the log on screen.

- For security purposes, do not click the **X** in the upper right corner of the window to close the application. Always click **Logout**.



Accessing Employee Information

1. From your default log on screen, click **My Employees > Employee Information**.
2. On the **Employee List** screen, click to select one or more employees, and then click **View Selected Employees**.
3. Optionally, click the **Employee Information** icon to view employee information for one employee.
4. Click the **Quick Links** icon to access a shortcut menu of various employee-related items such as:
   - Employee Information
   - Timesheets
   - Schedule

Viewing accrual balances for employees

1. From your default log on screen, click **My Employees > Accruals > Balances**.
2. Click the execute icon view balances.
3. Click the View History icon to view balance details for an individual employee. Click **Back** when finished.

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Viewing timesheets for employees

1 **Select Manage Time > Manage Timesheets**.

2 From the drop-down list, select the applicable timeframe to view timesheets:

- All
- By Pay Period
- Current
- All Open

3 To edit the timesheet for an employee, click the **Edit Timesheet** icon.

4 To preview the timesheet for an employee, click the **Preview Timesheet** icon.

5 To preview timesheet s for multiple employees, select the check box for each employee and then click **View Timesheets**.

Approving timesheets for employees

1 Select **Manage Time > Manage Timesheets**.

2 From the drop-down list, select the applicable timeframe to view timesheets:

- All
- By Pay Period
- Current
- All Open

3 To approve the timesheet for an employee, click the **Edit Timesheet** icon to open the timesheet. Then, click the **...** menu and select **Approve**.

4 To approve timesheets for multiple employees, select the check boxes next to each employee and then click **Approve**.

Viewing and responding to employee time off requests

1 Select **Manage Time > Time Off Requests**.

2 Select a status:

- Pending Approval
- All Open

3 From this view you can:

- View employee information
- Modify the time off request
- Open an employee's timesheet

4 To approve a time off request, select the check box for the employee and then click **Approve Checked Request**.

5 To approve time off requests for multiple employees, select the check box for each employee and then click **Approve Checked Request**.

6 You can also reject or modify requests individually or for multiple employees at once by clicking **Reject Checked Requests** or **Modify Requests**.

Viewing and responding to employee time off requests with workflows enabled

1 Select **My To Do** Items from of the following methods

- My Account > My To Do Items
- My To Do Items from the dashboard (if enabled)
- My To Dos Icon on the top toolbar

2 From the **My To Do** screen you can:

- View time off counts
- Modify the time off request
- Open the timesheet
- View scheduled people
- Approve the request
- Reject the request

3 To approve a time off request, click the **Approve** icon for the employee. To reject a time off request, click the **Reject** icon for the employee

4 To approve/reject time off requests for multiple employees, select the check box for each request and then click **Mass Approve** or **Mass Reject**.

Note: To approve/reject for multiple employees navigate to **My Accounts > My To Do Items** or click the **My To Do** icon on the top toolbar. Mass approval/reject is not an option from the dashboard

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Accessing and running reports

1 Select **My Reports**.

2 Select a category:

- My Saved Reports
- HR
- Time & Labor

3 Select a report.

4 In the report workspace, choose your report parameters. Your choices may include:

- Report Filters
- Rows On Page
- Use column headers and conditions to further define the report criteria

5 When finished defining the criteria, click **Refresh Data** to run the report.

6 To save the report for future use, click **Settings > Save Settings**. Provide a name and then click **Save**. Confirm your changes by accessing **My Reports > My Saved Reports**.

7 To export the report, click **Export**. Select an export format. Follow the screen prompts to view the exported report. (Options will vary based on the file format selected.)