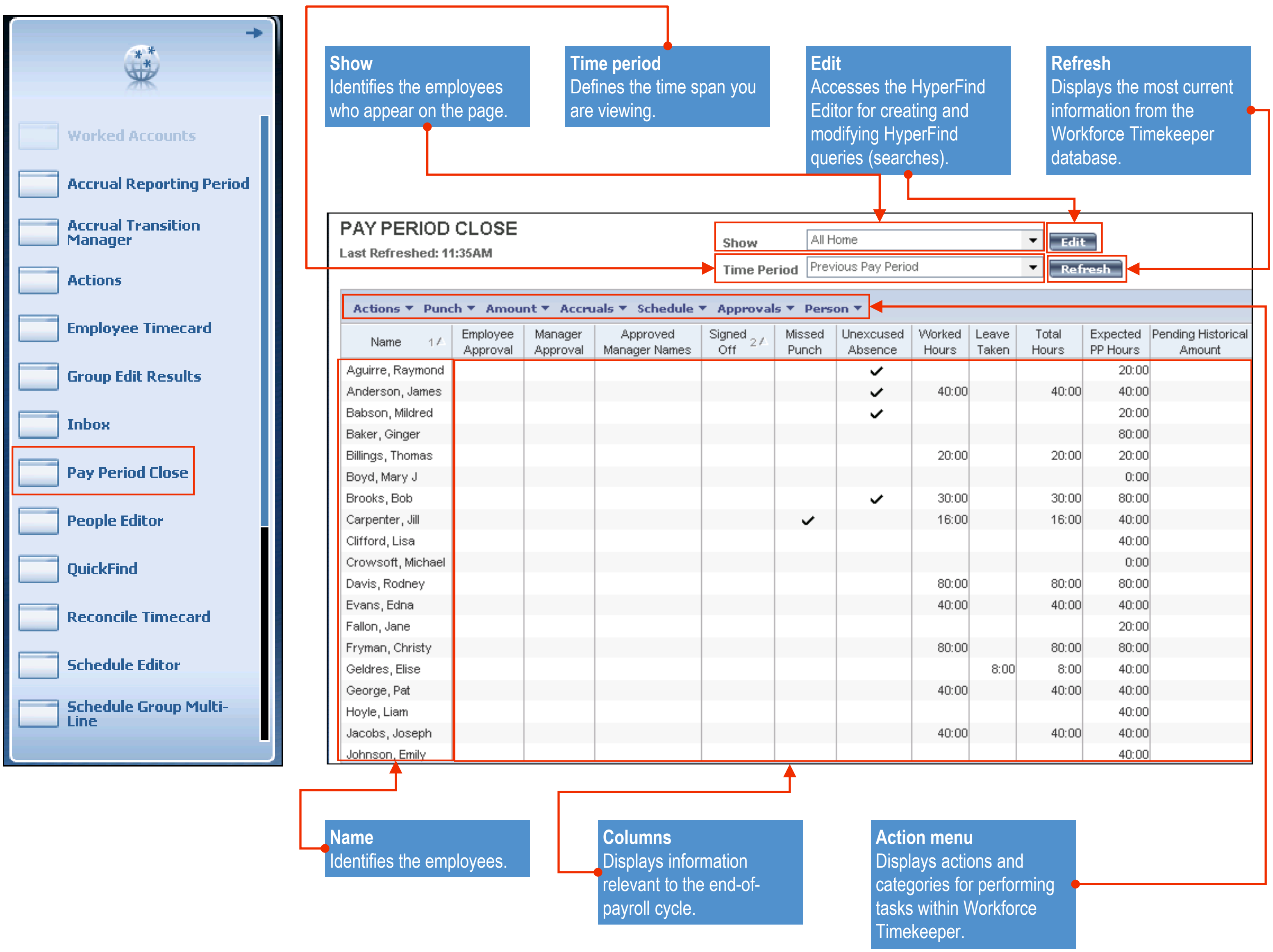
Workforce Timekeeper™
Payroll Close Tasks for Managers

Viewing the Pay Period Close Genie

If you have access to the **Pay Period Close (PPC)** Genie, it may be visible as a widget that appears in the Related Items pane.

To access PPC Genie, open the Related Items pane and select it from the list.



***Note**: You may only have access to some of these features mentioned here, depending on how Workforce Timekeeper is configured for you.*

Approving Timecards

1. From the PPC Genie, select one or more employees.
2. Do you want to approve timecards for the entire pay period or for selected days?
   - For the entire pay period, from the **Time Period** list select **Previous Pay Period**.
   - For one or more days, from the **Time Period** list select **Range of Dates** and specify the dates.
3. Select **Approvals > Approve**.
4. Access **Group Edit Results** and view the **Status** and **Results** columns.

Best Practices

- Review the **Pay Period Close** Genie to view the number of managers who have approved an employee's timecard. The managers' names might also appear in this Genie.
- If you do not want your employees to perform additional edits for a specific timeframe, apply your approval for that timeframe.
- To perform additional edits to a timecard you have approved, select **Approvals > Remove Approval**.

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Paying Employees From Their Schedules

1. From the PPC Genie, select one or more employees.
2. Select **Schedule > Pay From Schedule > Add**.
3. Enter a start date and an end date.
4. Access **Group Edit Results** and view the **Status** and **Results** columns.

Best Practices

- Use the Pay From Schedule feature as a temporary or exception-based option. For example, you need to submit hours to payroll by Thursday because of a holiday on Friday. You want to pay employees from their schedules for Friday.

Paying Out Employee Accruals Balances

1. From the PPC Genie, select one or more employees.
2. Select **Accruals > Pay Out**.
3. Select an accrual code and specify an effective date.
4. Access **Group Edit Results** and view the **Status** and **Results** columns.

Best Practices

- Check an employee's accrual balances by reviewing the information in the **Accruals Reporting Period** tab.
- To temporarily stop an employee's accrual grant, select **Accruals > Suspend & Reinstate**.
- To transfer a portion of an employee's accrual balance to a pool, select **Accruals > Group to Pool**. To transfer hours from a pool to a specific employee, select **Accruals > Pool to Employee**.

Group Edits

1. From the PPC Genie, select one or more employees.
2. Select an action menu and then select an action from the list.
3. Complete the information in the dialog box.
4. Access **Group Edit Results** and view the **Status** and **Results** columns.

Best Practices

- Use either a Workforce Genie or a HyperFind query to select a specific set of employees.
- Use a group edit whenever you want to apply the same change to a number of employees. Group edits run as a background process, so you can perform additional edits in Workforce Timekeeper while the group edit is processing.

Entering Overtime Accepted and Refused Time

1. From the **Overtime Equalization** Genie, select one or more employees.
2. Do you want to record accepted or refused time?
   - For accepted time, select **Amount > Add Accepted Overtime**.
   - For refused time, select **Amount > Add Refused Overtime**.
3. Complete the information in the dialog box.
4. Access **Group Edit Results** and view the **Status** and **Results** columns.

Best Practices

- Review the **OT Offered** column, which is the sum of the **OT Accepted** and **OT Refused** column amounts.
- Use a Workforce Genie as a starting point for entering overtime accepted and overtime refused amounts.
- Enter the date you offer the overtime for the effective date so that you can track overtime using the same time indicator.
- Include a comment for each transaction to help you justify the entries during a later time span.

Generating Reports

1. If you have access to reports, they may be visible as a widget that appears in the Related Items pane. Select the **Reports** widget.
2. Expand one of the categories and select a specific report.
3. From the **People** list, select a HyperFind option.
4. From the **Time Period** list, select a time span.
5. Click **Run Report**.
6. Click **Refresh Status** until **Complete** appears in the Status column.
7. Click **View Report**.

Best Practices

- To generate a report for one or more employees, select those employees using a Workforce Genie, and then right click and select **Reports**. Continue with step 2.
- To ensure that the report matches your needs, click the report name once and review its description in the workspace.
- While viewing a report, you can use the **Search** feature in Adobe Acrobat to locate specific information within a report.
- To send a report via e-mail, open the **Share** pane, and then select **Attach to Email** . By default, all standard reports use the Adobe Acrobat Document (.pdf) format.
- To print a report, use **Print file** option on the menu to send a report to a local or network printer.