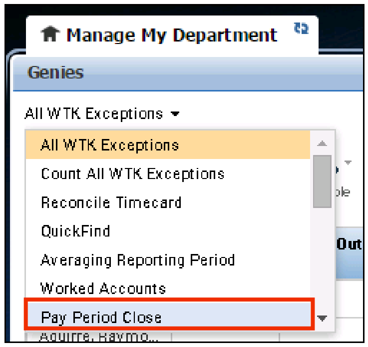
Workforce Timekeeper™

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 selection in the Genie drop-down list.

To access the Pay Period Close Genie, click the Genie drop-down arrow and select it from the list.



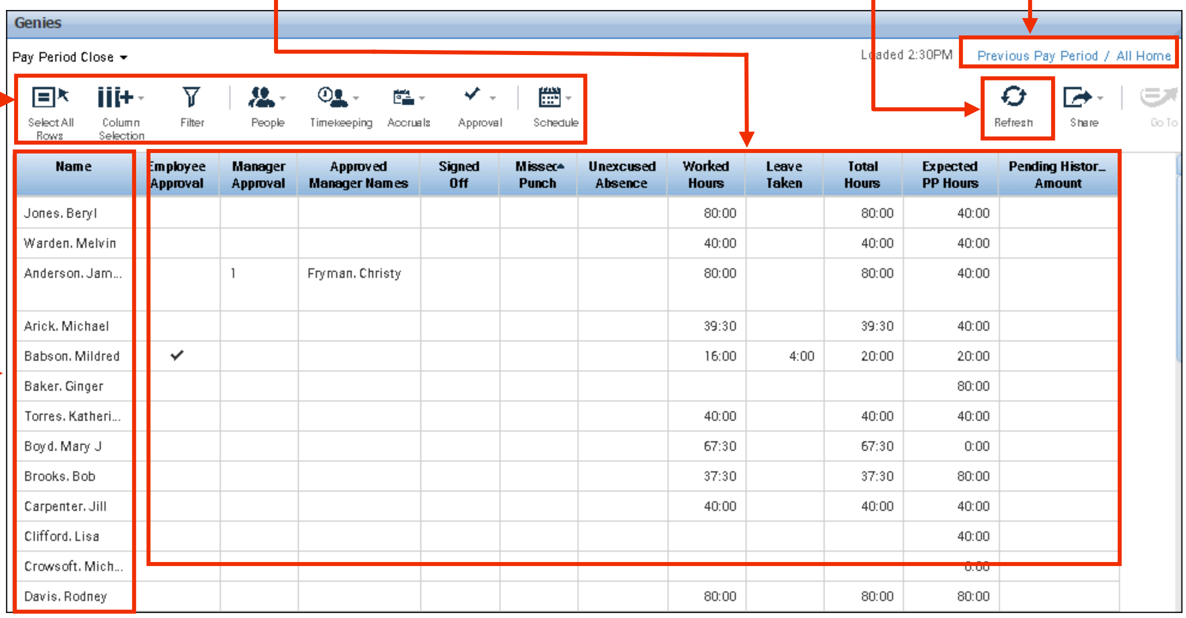
Columns
Displays information relevant to the end-of-payroll cycle.

Refresh
Displays the most current information from the Workforce Timekeeper database.

Show/Time Period
Identifies the employees who appear on the page and the time span you are viewing

Action menu
Displays actions and categories for performing tasks within Workforce Timekeeper.

Name
Identifies the employees.



Note: Depending on how Workforce Timekeeper is configured for you, you may have access to only some of the features mentioned here.

Reviewing Employees' Time

1. In the Pay Period Close Genie, review the data in the columns.
2. To view more details about an employee's time, double-click the **employee's name** to display his/her timecard.

Best Practices

- Review the Worked Hours column to quickly identify discrepancies in employee's total worked hours.
- Address missed punch issues to ensure that your payroll data is as accurate as possible.

Approving Timecards

1. In the Pay Period Close Genie, select **the employee group(s) and time period**.
   - If you want to approve timecards for the entire pay period, select **Previous Pay Period**.
   - If you want to approve timecards for one or more days, select **Range of Dates** and specify the dates.
2. Either **Select All Rows** or select the **individual employees** you want to approve.
3. Select **Approval > Approve Timecard**. Click **Yes**.
4. View **Group Edit Results**.

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 **Approval > Remove Timecard Approval**.

Paying Employees from Their Schedules

1. In the **Pay Period Close Genie**, select the **employee group(s) and time period**.
2. Select **Schedule > Add Pay From Schedule**.
3. Enter a **start date** and an **end date**. Click **Apply**.
4. View **Group Edit Results**.

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. In the **Pay Period Close** Genie, select the **employee group(s) and time period**.
2. Select **Accruals > Payout Accruals**.
3. Select an **accrual code** and an **effective date**. Click **Apply**.
4. View **Group Edit Results**.

Best Practices

- Check an employee's accrual balances by reviewing the information in the **Accruals** tab.
- To temporarily stop an employee's accrual grant, select **Accruals > Suspend & Reinstate Accruals**.
- 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. the **Pay Period Close** Genie, select the **employee group(s)** and **time period**.
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.

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** once.
7. When **Complete** appears in the Status column, click **View Report**.

Best Practices

- To generate a report for one or more employees, select those employees using a Workforce Genie, and then select **GoTo > 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 the **Print** option on the menu to send a report to a local or network printer.