Display Settings in WorkForce

Introduction

This document reviews WorkForce navigation and display settings for the online time sheet employee and time sheet manager.

Warning: You must be able to access/receive your OHIO email. All WorkForce processes are based on your OHIO ID.

Document Information

<table>
<thead>
<tr>
<th>For further instructions, go to:</th>
<th><a href="http://www.ohio.edu/finance/payroll/workforcepage.cfm">www.ohio.edu/finance/payroll/workforcepage.cfm</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>WorkForce Access:</td>
<td>workforce.ohio.edu</td>
</tr>
<tr>
<td>WorkForce Questions:</td>
<td>Contact Payroll at 740-593-1859</td>
</tr>
<tr>
<td>Problems Connecting:</td>
<td>Contact OIT Service Desk at 740-593-1222</td>
</tr>
<tr>
<td>Last Revision Date</td>
<td>March 26, 2014</td>
</tr>
</tbody>
</table>

In this section

This section lists the Tasks for accessing and reviewing WorkForce navigation and display settings, and the corresponding page(s) to reference.

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Task #1 Logging into WorkForce

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<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Results / Notes</th>
</tr>
</thead>
</table>
| 1    | Go to: workforce.ohio.edu  
     | Note: You may bookmark this screen. | The OHIO Login Screen is displayed. |
| 2    | • Click in the OHIO ID field.  
     | • Enter your OHIO ID.  
     | • Press the Tab key.  
     | • Enter your OHIO Password.  
     | • Click the Login button. | WorkForce application opens.  
Dependent upon your role(s) in WorkForce, one of two dashboards will display;  
Employee/Student Dashboard view (see #3a).  
Manager Dashboard view for managers that also have their own time sheet (see #3b). |
| 3    | Begin Working in WorkForce! | |

#3a Employee/Student Dashboard View

![Employee/Student Dashboard](image)

- **Time Entry**
  - Enter My Hours
  - View Past Assignments

- **Reports**
  - View General Reports
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Task #1 (cont.) Logging into WorkForce

#3b Manager/Manager’s with a Time Sheet Dashboard
Task #2  
**Time Entry Window Overview - Access Time Entry**

The employee time sheet will display in the last view selected, List View or Table View, until changed. Before you begin using the Time Entry screen, you should familiarize yourself with the screen layout and the various functions and display settings available on the screen.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</tr>
</thead>
</table>
| 1    | • Click on the link *Enter My Hours* in the *Time Entry* box.  
      • If you are a student, and you have more than one assignment, click on the appropriate assignment. | The employee time sheet for the unprocessed pay period is displayed. The time sheet opens in the view selected until changed. |
| 2    | Begin Entering Time | See next section for specific Display Settings. |
Task #3  Time Entry Window Overview-Function Icons

Function icons are clickable images that provide shortcuts to certain WorkForce program functions and are located at the top of the Time Entry window. Refer to the Function Icon table next.

<table>
<thead>
<tr>
<th>Function Icon/Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Icon</strong></td>
<td>The Home Icon returns you to the Dashboard. If you want to exit the system, click the Log Off link.</td>
</tr>
<tr>
<td><strong>Log Off Link</strong></td>
<td>The Log Off link is located in the upper-right hand corner of the page. Click the Log Off link to exit the system. <strong>You must save changes before logging off.</strong></td>
</tr>
</tbody>
</table>
### Task #3 (cont.)  Time Entry Window Overview-Function Icons

<table>
<thead>
<tr>
<th>Function Icon/Link (cont.)</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Pay Period Icon**        | • Allows you to select a different Pay Period.  
• Click on the directional arrows to move the Pay Period Date Range to future or past Pay Periods.  
You may also click on the Calendar Icon and select a date from the calendar that displays. |
| **Save Icon**               | Saves your time sheet data. You must save when you exit. You should save every time you enter new data if you want to see the results right away, for instance, total hours for the day. |
| **Submit Icon**             | • Sends your completed time sheet to your manager for approval.  
• The submittal of your time sheet is your electronic signature for your time sheet. |
| **More Icon**               | • Click the black triangle on the More Icon.  
• This function allows you to select other functions  
  o Copy From Prior Period  
  o Copy From Prior Period  
  o Print Preferences, and  
  o Reload Data. |
| **Copy From Prior Period**  | • Open the time sheet for the current pay period.  
• Click the black triangle on the More Icon.  
• Click Copy From Prior Period link.  
• Make corrections and edits as necessary.  
• Click the Save icon  

**Note:** Only Regular hourly pay will be copied. Regular hours may be copied into a designated holiday. WorkForce automatically records holiday hours for employees. Remove the entry, if you did not work the holiday.
### Task #3 (cont.)  Time Entry Window Overview-Function Icons

**Table/List View**

The View Icon changes the view type in the Time Sheet tab and the Schedule tab. The text on the View Icon reflects the current view in the selected tab. The time sheet opens in the view selected until changed.

**Switch Assignments**

- Click on the *Switch Assignment* button.
- Click the appropriate assignment in the list, which will open the time sheet.

The Assignments menu opens, for an employee with multiple assignments, listing the assignments active in the selected period. The selected assignment corresponding to the time sheet in the window appears highlighted with a bullet.
Task #4 Employee Time Sheet-List View vs. Table View

The employee time sheet will display in the List View which is the default view. There are two views available; List View and Table View.

- The List View displays each time sheet entry for the entire pay period in a list.
- The Table View displays a grid -- the days as columns with the entries in rows. The Table View allows you to quickly enter repetitive time. Instead of selecting a pay code for each day, you can utilize the Table View to enter your options once and simply enter the daily hours for each pay code.

The employee or manager accessing the employee time sheet may switch views. The time sheet opens in the view selected until changed.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Results / Notes</th>
</tr>
</thead>
</table>
| 1    | • Click on the link *Enter My Hours* in the *Time Entry* box.  
      • If you are a student, and you have more than one assignment, click on the appropriate assignment. | The employee time sheet for the unprocessed pay period is displayed. The time sheet opens in the view selected until changed. |

The time sheet opens in the list view selected. This time sheet displays the List View.

The List View displays each time sheet entry for the entire pay period in a list by day.
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Task #4 (cont.) Employee Time Sheet-List View vs. Table View

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Results / Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>• To change views, click on the down arrow on the List/Table View icon.</td>
<td>The time sheet opens in the Table View.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The current view is bulleted.</td>
</tr>
<tr>
<td></td>
<td>• Choose Table View</td>
<td></td>
</tr>
</tbody>
</table>

The time sheet opens in the list view selected. This time sheet displays the Table View. The Table View displays the data in columns with the entries in rows.
Task #5 Employee Time Sheet-Time Entry Window Tabs

The Time Entry window provides the options necessary for completing time entry. From this screen, you can:

- Enter your time on the **Time Sheet** tab
- View and/or correct your Time Sheet Exception messages on the **Exceptions** tab
- View Paid Time Off Balances on the **Time Off Balances** tab
- View the details of your pay on the **Pay Preview** tab
- View your schedule on the Schedule tab.
Task #6  Employee Time Sheet-Time Sheet Tab

The Time Sheet tab displays your time and attendance information. The time sheet includes icons for inserting, copying, and deleting rows, which allow you to record your time using different Pay Codes, as needed, during the workday/workweek.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Results / Notes</th>
</tr>
</thead>
</table>
| 1    | • Click on the link Enter My Hours in the Time Entry box.  
     • If you are a student, and you have more than one assignment, click on the appropriate assignment. | The employee time sheet for the unprocessed pay period is displayed. The time sheet opens in the view selected until changed. |
| 2    | Click in the Show All Weeks box, to display the full pay period, if only one week is displayed. The Show All Weeks box is located above the time entry portion of the time sheet. | Both weeks will be displayed in the time sheet. |
| 3    | To change Time Sheet views, click on the down arrow on the List/Table View icon. | The time sheet displays in the view selected. |
### Task #6 (cont.)  
#### Employee Time Sheet-Time Sheet Tab

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Results / Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>View the Accumulated Total Hours displayed in the yellow pop-up above the time sheet.</td>
<td>The Total Hours accumulates as time is entered on the time sheet.</td>
</tr>
</tbody>
</table>
| 5    | There is only one Regular Hourly Pay row listed per week. To add additional Pay Codes you must add a row:  
- Click the (Insert icon) to add the row  
- Click the drop-down arrow in the Reg Hrly Pay field  
- Choose the appropriate Pay Code and enter time on the appropriate Day. | When you are on the Table View, once you add new Pay Code row to a week, you do not need to add it again. |
| 6    | To copy hours worked from a previous pay period, click the black triangle on the More Icon located above the Time Sheet. |  |
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Task #7  Employee Time Sheet-Exceptions Tab

The Exceptions tab displays messages when exceptions are detected. The Exceptions tab provides the following information:

- Date of the Exception
- Exception Message (message describing the problem)
- The severity of the exception
- Any action that may be required.

To view exceptions for a specific day, select the Filter exceptions by day checkbox.

Three exception messages may appear at the bottom of your time sheet. The messages are color-coded to identify the level of severity.

- **Info** messages, such as “Late,” do not require any action.
- **Warning** messages, such as “no time entered on a scheduled day,” may or may not require some corrective action.
- **Error** messages in red, require corrective action by the employee or manager.

If the corrective action is not taken, the employee is not paid for the time associated with the error. (Red push pin displays on day of error.)

If a time slice has an ‘Error’ exception, a red exception pin appears on the time sheet in that particular day field. You can click on the red pin to display the exception message instead of opening the Exceptions tab.
Task #8  Employee Time Sheet-Time Off Balances Tab

Click on the *Time Off Balance* tab at the bottom of the time sheet to display available Paid Time Off (PTO) balances. Sick, Vacation, Personal, and Comp time is applicable to Classified, Bargaining Unit, & FOP Employees. All PTO is designated as hours except Birthday balance is 1 day.

**Note:** *Student Employees do not accrue any Paid Time Off.*

The *Time Off Balances* section displays a separate box for these PTO types: Sick, Vacation, Personal, Birthday, and Comp, if applicable.

- *Initial Balance*-Displays the total number of hours available at the beginning of the pay period. For Sick, Vacation, and Personal time, only the hours available in the *Initial Balance* column may be used in the current pay period. AFSCME employees can earn Comp Time one day and use it the next day.
- *Accrued* and *Used*: Displays the detailed activity, accruals and usages, for each type of PTO for the current pay period.
- *Ending Balance*-Displays the total number of hours accrued by the end of the current pay period according to the amount of time displayed on the time sheet. The difference between the initial and ending balances represents the amount of time accrued and used during the current pay period (see the next section).
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Task #8 (cont.)  Employee Time Sheet-Time Off Balances Tab

Comp Time-When Comp Time is banked on the time sheet, the system automatically multiplies the time by 1.5 hrs. (1 hr. of Overtime banked as Comp Time on the time sheet automatically calculates to 1.5 Comp Time hours added to the Comp Time bank.)

You may view more details on any PTO balance boxes that have accrual or usage activity for the current pay period. To view more details regarding the PTO accruals and usage:

- Click the Show Details link to view the details.

  ![Sick Balance](image)

  - Click the Hide Details link to return to the original view.

  ![Sick Accruals](image)
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Task #9 Employee Time Sheet-Pay Preview

Click the Pay Preview tab to view your gross pay calculation. The Pay Preview tab displays your projected pay information for the current pay period.

Note: Click on the Column headings to sort data by a particular category.

- **Student employees** will see the gross calculation for ALL time sheets with hours on their pay preview.
- **AFSCME and FOP employees** will see the gross calculation for all pay codes used during the pay period.
- The Pay Preview table displays:
  - Work Date
  - Pay Code-Displays any pay codes used in the current pay period.
  - Job-Displays Job Name. Applicable to students.
  - Fund Type, Fund, Organization, Natural Account, & Project-These fields represent the account number to which the pay is expensed.
  - Rate-Rate for each specific pay code listed
  - Amount-Flat amount pay, for example, FLSA adjustments.
  - Unpaid Hours-Records hours for lunches and banked comp time.
  - Shift Hours-Hours paid at 2nd, 3rd, or weekend shifts.
  - Paid Hours-Hours by which rate is multiplied.
  - Pay-Gross earnings listed for each pay code/day/hours calculation.

Note: Any time from an amended time sheet will be included on the current pay period pay preview. See the Amend Time Sheet Quick Reference Guide.
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Task #10  Employee Time Sheet-Schedule

Click the Schedule tab to view your schedule for the pay period. The Schedule is nearly identical to your time sheet except it displays your lunch time for each day.

Note: If you are a manager, you may make a temporary change to the employee schedule on the Schedules tab. Click the Save icon to save schedule changes before exiting. For permanent changes, click on the link Assign Schedules in the Schedules box. For details on temporary and permanent schedule changes refer to the Manager Time Sheet Approval Quick Reference Guide.

![Schedule Tab Example](image-url)
### Task #11  Employee Time Sheet-Print Time Sheet

You are able to print time sheets directly from the Time Entry window. You can print your time sheet for any work period you are able to view.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Results / Notes</th>
</tr>
</thead>
</table>
| 1    | • Click the black triangle on the More Icon.  
      • Choose Print Preferences.  
      [Image: More Icon](#) | The Print Preferences window is displayed. |
| 2    | • Select the components you would like to print from the following options;  
      o Time Sheet  
      o Exceptions  
      o Time Off Balances  
      o Pay Preview  
      o Schedule  
      • Click on the *Save as Default* button to save the settings for future printing.  
      • Click the *Print* button to print. | The Print Preview window is displayed. Then a Print window is displayed. |
| 3    | Click the *Print* button on the Print window. | Time Sheet prints. |
| 4    | Click the *Close* link in the upper-right corner of the Print Preview window. | Returns you back to the Time Sheet. |