

2022

WORKFORCE TRAINING

MANAGER'S GUIDE

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Definitions

Dashboard – A digital panel that displays the available user options at a glance and allows the user to access these options, often with a single click.

Pay Codes – Unique identifiers required for every transaction on a timesheet or schedule (i.e. Worked, Sick, Care for Leave, etc.).

Casual Employee – A non-unionized employee (i.e. Student/Research Assistant/Casual), or a unionized employee who works on an unscheduled or intermittent basis

Regular Employees – A full-time or part-time employee who works on a continuing basis, including most term employees.

Time Slice – An interval of time that includes a start and end time.

In/Out Time – “In” time is the start time (i.e. 0830 or 8:30 a.m.) of the shift or absence, and “Out” time is the end time (i.e. 1630 or 4:30 p.m.) of the shift or absence.

Elapsed Hours – The passage of a period of time entered in hours.

Delegation - The function of giving someone else in the organization the right to perform certain actions on a temporary or more permanent basis.

1. Accessing Workforce

Logging on to Workforce as a Manager

To log into Workforce:

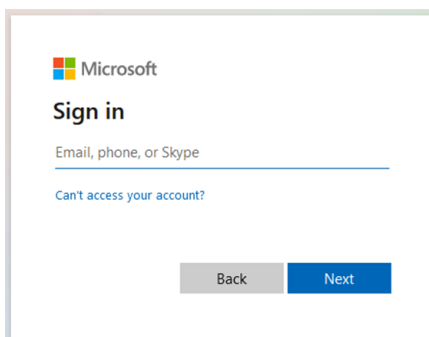
- Go to <https://workforce.brandonu.ca>

If you are already logged into Microsoft 365:

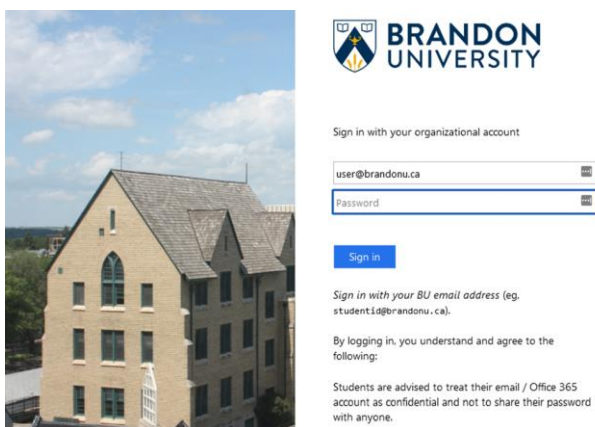
- you will be auto-signed into Workforce

If you are **NOT** already logged into Microsoft 365:

- you will first be prompted to sign in using your full BU email address (not just your username)



- Click **Next**
- You will then be redirected to Brandon University's sign in page for single sign-on access
- Enter your BU password and click **Sign in**



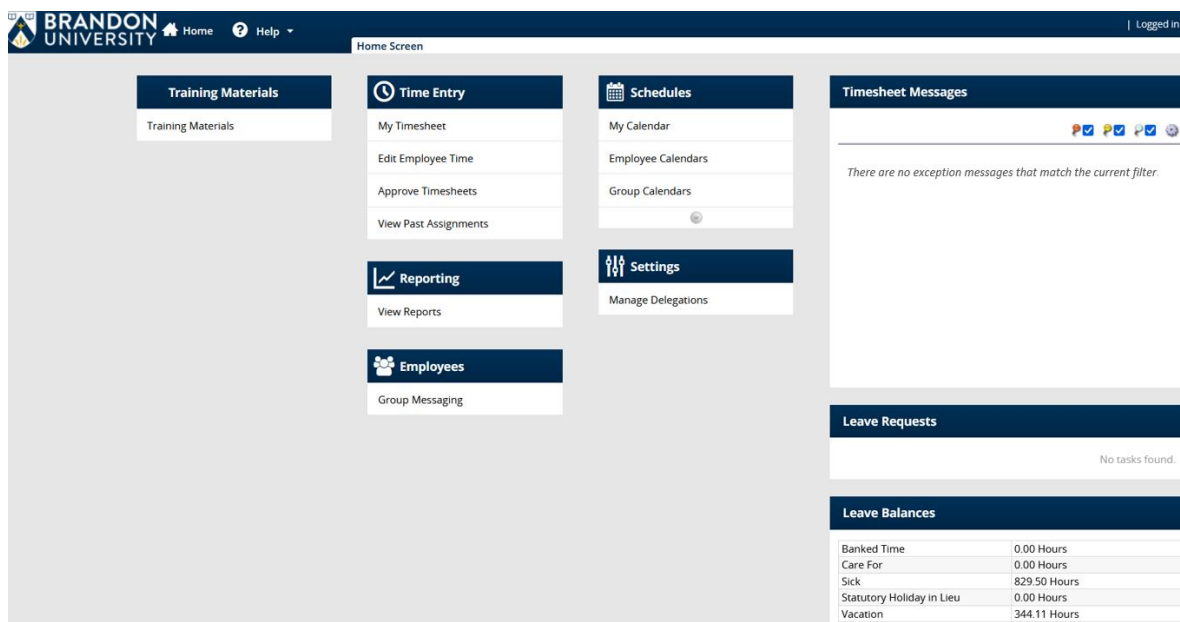
If you are not a registered user in Workforce,

- you will see an *Authentication Failed* error message. If this occurs and you require access, contact either your supervisor or Payroll.



Manager Dashboard

The Workforce Time and Attendance dashboard appears. The manager's dashboard contains functions that are available in addition to the employee dashboard.



The Manager Dashboard serves as a starting point for carrying out available functions and features. The Manager Dashboard areas include:

Time Entry

Point-of-entry to:

- edit timesheets for employees prior to approval
- view an employee's time-off balances
- view an employee's pay period hours
- approve employee timesheets

Schedules

Point-of-entry to:

- review employee time-off requests
- assign permanent or temporary schedule templates
- view and edit schedules for employees

Reporting

Point-of-entry to:

- access any general or group reports available

Settings

Point-of-entry to:

- delegate, view or revoke your manager authority for an employee or group of employees to another individual

Employees

Point-of-entry to:

- send a message to an employee or group of employees

Employees' Timesheets

While employee timesheets may be accessed by clicking on **Edit Employee Time** under the *Time Entry* area, a quick glance of the employee timesheets that have been submitted can also be easily viewed and/or accessed from the Manager's Dashboard under the *Employees' Timesheets* area.

2. Time-Off Requests

Review/Approve/Decline Pending Time-Off Requests


When an employee submits a time-off request, an email notification will go to the manager (or delegate) that states, "*Employee Name* has requested time off. Please review."

To review pending time-off requests:

- In the *Leave Requests* area, click on the employees name under the *Details* heading to open

OR

- In the *Schedules* area, click on **Review Time-Off Requests**

Leave Requests		
Details	Status	Date
 Employee Name (000000000)	Pending	11/14/2022 - 11/16/2022

Schedules	
My Calendar	☆
Employee Calendars	☆
Group Calendars	☆
My Time Off	☆
Review Time Off Requests	☆
Assign Schedules	☆

- In the *Pending Requests* window, pending employee time-off requests will appear.

My Pending Requests

All Requests

Current filter: none

Employee ID	Employee Name	Type	Start Date	End Date	Amount Requested	Last Modified
000000000	TEST Employee Name	Time off - Vacation	11/14/2022	11/16/2022	21 Hours	11/07/2022 01:39 pm

- Click on the name of the employee to open the request
- The *Request Summary* window appears, displaying:
 - a summary of the request
 - a link to review Request List
 - exception messages
 - an area for Manager comments

To approve or decline pending employee requests:

- Above the *Request Summary* box click on the appropriate option:
 - Approve Request** or **Reject Request**

View Request List
 Approve Request
Reject Request

Request Summary

TEST Employee Name, Position, 000000000

Pending

Date	Pay Code	In Time	Out Time
Mon 11/14/2022	Vacation	08:30 am	12:00 pm
Mon 11/14/2022	Vacation	01:00 pm	04:30 pm
Tue 11/15/2022	Vacation	08:30 am	12:00 pm
Tue 11/15/2022	Vacation	01:00 pm	04:30 pm
Wed 11/16/2022	Vacation	08:30 am	12:00 pm
Wed 11/16/2022	Vacation	01:00 pm	04:30 pm

Comments
 TEST

Exceptions (0)

Workflow

Date/Time	Action	User	Comments
11/07/2022 01:39 pm	Submission	TEST Employee Name	TEST



When a time-off request is approved, the request moves to the *All Requests* window in the *View Request List* and the *Status* changes from Pending to Approved. Once approved, it appears on the employee's timesheet for the requested entry code and date and an email is sent to the employee stating, "Your time-off request has been approved."

When a time-off request is rejected, the request moves to the *All Requests* window in the *View Request List* and the *Status* changes from Pending to Rejected. Nothing is noted on the employee's timesheet and an email is sent to the employee stating, "Your time-off request has not been approved."

3. Editing Timesheets

Manager Entry Codes

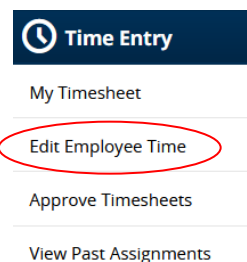
Managers can enter the following codes on employee timesheets (where applicable).

- Worked
- Banked Time
- Bereavement Leave
- Callback
- Care for Leave
- Employee Requested Overtime
- General Holiday Worked
- Jury Duty
- Interpersonal Violence Leave
- Moving Day
- Parental Leave
- Payout Banked Time
- Sick
- Standby
- Statutory Holiday in Lieu
- Union Business
- Vacation

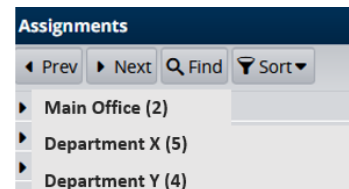
Edit an Employee's Timesheet

To edit an employee's timesheet:

- In the *Time Entry* area on your Manager dashboard, click **Edit Employee Time**



- An *Assignment Groups* list appears; click the name of the desired assignment group
- This selection expands into a list of the employees within the group; click on the employee's name
- The current timesheet for that employee appears and as a manager, you may edit the timesheet.



Entering in/out time:

- Check to see that you are in the *Time Entry* tab and not the *Schedule* tab
- Check that the employee's active timesheet is for the desired pay period
- Under the *Date* heading (first column), find the desired date
- Under the *Entry Code* heading (second column), click the drop-down arrow to the right of the **Worked** code to display a list of available entry codes and select the desired code
- Under the *Hours* heading, adjust the employee's time accordingly (entering time in the 24-hour clock format is recommended)
- Click Enter or select the time from the drop-down list that appears
- Under the *Comments* heading, enter any additional information
- Click **Save**

Entering elapsed time:

- Check to see that you are in the *Time Entry* tab and not the *Schedule* tab
- Check that the employee's active timesheet is for the desired pay period
- Under the *Date* heading (first column), find the desired date
- Under the *Pay Code* heading (second column), click the drop-down arrow to the right of the **Worked** code to display a list of available entry codes and select the desired code
- Under the *Hours* heading, adjust the employee's time accordingly (entering time in the 24-hour clock format is recommended)
- Click Enter or select the time from the drop-down list that appears
- Under the *Comments* heading, enter any additional information
- Click **Save**

4. End-of-Period Reminders

Reminder messages to submit and approve timesheets will be sent to Employees, Managers, and those with delegated authority. Note the following messages and who they will be sent to.

Message	Sent	Recipient(s)
"Please submit your time sheet by Monday at noon."	Sent Friday (week two) of Pay Period at 2:00 p.m.	Student/Research Asst/Casual, MGEU Food Services, MGEU Food Services Casual, IUOE (A) Casual & IUOE (D) Casual
"Please submit your time sheet exceptions by Monday at noon."	Sent Friday (week two) of Pay Period at 2:00 p.m.	IUOE (A), IUOE (D), MGEU, ESS, MPO
"Please approve your employee time sheets by Tuesday at noon."	Sent Friday (week two) of Pay Period at 4:00 p.m.	Managers & Delegates
"Second Reminder - Please approve your employee time sheets by Tuesday at noon."	Sent Monday (following the Pay Period) at 1:00 p.m.	Managers & Delegates




Given that employees have until Monday at noon to submit their time sheet exceptions, Managers will want to keep this timeline in mind when doing their approvals.

5. Approving Timesheets

Approving Employee Timesheets

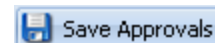
- In the *Time Entry* area of your Manager Dashboard, click **Approve Timesheets**
- The *Approve Timesheets* window appears, click on the correct assignment group
- The *Approve Current Timesheets* window appears, listing the employees for the selected assignment group

Approve Current Timesheet for Period Ending 10/21/2022											
Name ▲	Employee ID	Assignment	Description	Regular Hours	OT Pending	OT	Absence Hours	Total Hours	Messages	Submitted	Approval
Employee Name	12345	MPO	Position Title	63.0	0.0	0.0	0.0	70.0	Information	No	<input type="button" value="Approve"/>  
Employee Name	02468	MPO	Position Title	63.0	0.0	0.0	0.0	70.0	Information	No	<input type="button" value="Approve"/>  
Employee Name	54321	MPO	Position Title	63.0	0.0	0.0	0.0	70.0		No	<input type="button" value="Approve"/>  

- Click on the employee's name to view and/or edit submitted timesheets
- Save any changes you make within the timesheet and close
- Under the *Approval* heading, click the **Approve** button to approve the employee's corresponding timesheet

OR


- If all timesheets have been submitted, reviewed and they do not have any errors or exceptions that would prevent them from being approved, you may approve them all at once by clicking the **Approve All** button.
- To save the timesheet approvals, click the **Save Approvals** button




For MGEU Food Service, MGEU Food Service Casual, IUOE (D) Casual, and Student/Research Assistant/Casual employees, submitted timesheets must be approved by the approving Manager (BU Manager Level 3 or higher) in order for timesheets to be processed and employees to be paid. If submitted timesheets are not approved, the unapproved timesheet will remain open for amendment and later approval. The unapproved timesheet will continue to appear in the approve timesheets window until approved.

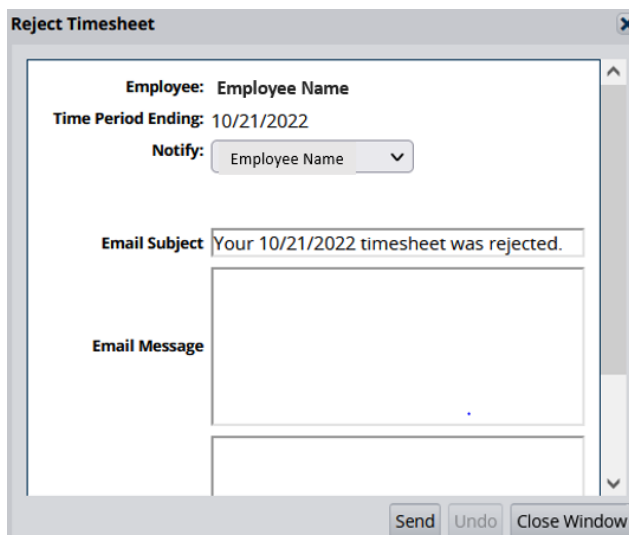
For MGEU, Excluded Support Staff, Managers and Professional Officers, IUOE (A) and IUOE (D) regular or term employees, submitted timesheets with time exceptions to the scheduled worked time must be approved by the approving Manager (BU Manager Level 3 or higher) or the employee will only be paid their scheduled work time and relevant accruals will not be adjusted. The unapproved timesheet will remain open for amendment and later approval. The unapproved timesheet will continue to appear in the approve timesheets window until approved.

To view the timesheet history of an approved timesheet:

- Click the **History** icon  that now appears to the right of the *Approve* button
- The *Approval History* window appears, displaying
 - the action taken,
 - the ID of the person who took the action,
 - the date and time the action was taken, and
 - any email messages or comments that were made.

To reject a timesheet:

- Under the *Approval* heading, click the **Reject** icon 
- The *Reject Timesheet* window appears, allowing you to notify the employee by email message
- Enter your message or comments and click the **Send** button



Approving Overtime

When an employee has overtime entered on their timesheet, the manager must approve the individual overtime entries within the timesheet under the *Messages* tab. Clicking the *Approve* button from the *Approve Timesheets* window does not automatically approve the overtime entry.

To approve an overtime entry:

- In the *Approve Current Timesheet Window*, click on the name of the employee who has overtime requiring approval
- On the timesheet, under the *Messages* tab, the overtime message states, *"Overtime calculated on timesheet."*
- Under the *Action Required* heading it states, *"Please approve."*
- Under the *Acknowledge* heading, click the checkbox to approve/acknowledge the entry
- Click **Save**

6. Amending Timesheets

Managers may amend timesheets that have already been approved and processed for up to 52 previous pay periods. To amend a timesheet that precedes the 52 pay periods, managers should contact Human Resources.

To amend an employee timesheet:

- Click the *Home* link at the top left corner of the screen (takes you back to the dashboard)
- In the *Time Entry* area, click **Edit Employee Time**
- Locate the timesheet for the required pay period using the arrows or calendar icon under the *Work Period* heading in the upper left corner of the screen
- A message appears at the top of the screen stating, *"This timesheet has already been processed. Press amend button to make changes."*
- Click the **Amend** button found at the top centre of the screen to unlock the timesheet
- Make necessary changes and click **Save**
- Click the *Home* Link at the top left corner of the screen (taking you back to the dashboard)
- In the *Time Entry* area, click **Approve Timesheets**
- This timesheet now appears in a window under the heading *Approve Amended Timesheet for Period Ending (applicable pay period)*
- Review and approve

7. Applying Schedule Templates

Permanent Schedule Assignments

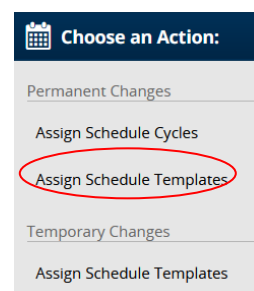
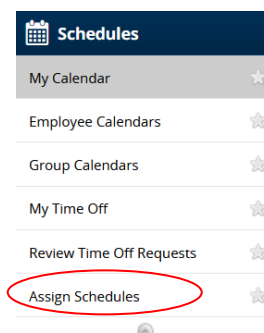
Regular employees that have assignments within the following assignment groups will have their schedules default to their timesheets and will **adjust their timesheets with exceptions to their scheduled work time only** (e.g. absences, overtime).

- MGEU
- IUOE (A)
- IUOE (D)
- Excluded Support Staff
- Managers and Professional Officers

Change a Permanent Schedule Template

To change a permanent schedule to an employee or assignment group:

- In the *Schedules* area on your Manager dashboard, click **Assign Schedules**
- Under the *Permanent Changes* heading, click **Assign Schedule Templates**
- The *Permanent Schedule Template Assignment* window appears; click on the correct Assignment Group.




- A list of the assignments in the assignment group appears.

<input type="checkbox"/>	Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
<input type="checkbox"/>	Employee Name (Department & Title)	Schedule Template	<input checked="" type="checkbox"/>	BU_70HOURS_MTWTF_83I	<input type="text"/>	10/08/2022 - 10/21/2022
<input type="checkbox"/>	Employee Name (Department & Title)	Schedule Template	<input checked="" type="checkbox"/>	BU_70HOURS_MTWTF_83I	<input type="text"/>	10/08/2022 - 10/21/2022

Change a Permanent Schedule Template to One Assignment

To change an entry for one assignment in the group:

- Click the **checkbox** to the left of the name of the desired assignment
- In the *Schedule Template* dropdown menu, click the correct schedule template
NOTE: If a template does not exist for the schedule you require, contact Human Resources, as they will have to create this.
- Click on the calendar icon  to select the **Effective Date**. The date must fall within the period defined in the **Valid Date Range** field.


Once you are ready to proceed:

- Click the **Save** button to save your changes.
- Click the **Reset** button to clear your changes and start over.
- Click the **Back** button to return to the Schedule Maintenance screen without saving your changes.



Change a Permanent Schedule Template to More than One Assignment

To apply the same entry to more than one assignment in the group:

- Click the **checkbox** to the left of the name of the desired employee assignment(s)
- Enter your selections within the *Mass Edit* section
- In the *Schedule Template* dropdown menu, click the correct schedule template
NOTE: If a template does not exist for the schedule you require, contact Human Resources, as they will have to create this.
- Click on the calendar icon  to select the **Effective Date**. The date must fall within the period defined in the **Valid Date Range** field.
- When making changes to more than one assignment in the group, click **Apply to all checked rows**

Once you are ready to proceed:

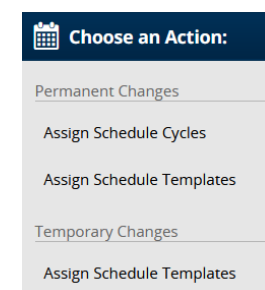
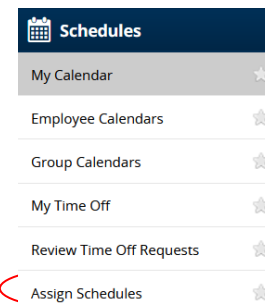
- Click the **Save** button to save your changes.
- Click the **Reset** button to clear your changes and start over.
- Click the **Back** button to return to the Schedule Maintenance screen without saving your changes.



Assigning a Temporary Schedule Template

To assign a temporary schedule to an employee or assignment group:


- In the *Schedules* area on your Manager dashboard, click **Assign Schedules**
- Under the *Temporary Changes* heading, click **Assign Schedule Templates**
- The *Temporary Schedule Template Assignment* window appears; click on the correct Assignment Group.
- A list of the assignments in the assignment group appears.



<input type="checkbox"/>	Name	Schedule Generation Source	Manager Override	Schedule Template	Effective Date	Valid Date Range
<input type="checkbox"/>	Employee Name (Department & Title)	Schedule Template	<input checked="" type="checkbox"/>	BU_70HOURS_MTWTF_83I		10/08/2022 - 10/21/2022
<input type="checkbox"/>	Employee Name (Department & Title)	Schedule Template	<input checked="" type="checkbox"/>	BU_70HOURS_MTWTF_83I		10/08/2022 - 10/21/2022

Apply a Temporary Schedule to One Assignment

To apply an entry to one assignment in the group:

- Click the **checkbox** to the left of the name of the desired assignment
- In the *Schedule Template* dropdown menu, click the correct schedule template
NOTE: If a template does not exist for the schedule you require, contact Human Resources, as they will have to create this.
- Click on the calendar icon  to select the **Effective Date**. The date must fall within the period defined in the **Valid Date Range** field.


Once you are ready to proceed:

- Click the **Save** button to save your changes.
- Click the **Reset** button to clear your changes and start over.
- Click the **Back** button to return to the Schedule Maintenance screen without saving changes.



Apply a Temporary Schedule to More than One Assignment

To apply the same entry to more than one assignment in the group:

- Click the **checkbox** to the left of the name of each desired assignment
OR
- Click the **checkbox** beside the *Name* field to select all assignments
- Enter your selections within the *Mass Edit* section
- In the *Schedule Template* dropdown menu, click the correct schedule template
NOTE: If a template does not exist for the schedule you require, contact Human Resources, as they will have to create this.
- Click on the calendar icon  to select the **Effective Date**. The date must fall within the period defined in the **Valid Date Range** field.
- When making changes to more than one assignment in the group, click **Apply to all checked rows**

Once you are ready to proceed:

- Click the **Save** button to save your changes.
- Click the **Reset** button to clear your changes and start over.
- Click the **Back** button to return to the Schedule Maintenance screen without saving changes.



NOTE

Employees who have a permanent schedule assigned and enter time exceptions only are paid up-to-date, however, any time exceptions that are entered will be recorded two weeks (a pay period) in arrears. Employees who have a temporary schedule or no schedule assigned, will be paid two weeks (a pay period) in arrears and all records will be two weeks in arrears.

Temporary schedules may only be assigned per pay period.

8. Delegation

As a Manager, at some point, you may want or need to delegate authority to another individual. You may want to delegate your Manager authority to an individual for a week while you are out-of-the office or you may wish to delegate authority to that individual for the long-term, knowing that delegations may be revoked at any time.

There are two delegation options for Managers to choose from - *Manager* or *Administration*.

A Dean or Director has the *Manager* role assigned to them in Workforce, providing the ability to:

- access and run reports for individual employees or groups of employees that they manage
- edit timesheets for the employees within the assignment groups for which they have authority, within the constraints defined for each pay code
- approve or reject timesheets for employees within the assignment groups for which they have authority
- approve or decline time off requests for employees within the assignment groups for which they have authority
- receive emails regarding unapproved timesheets of employees within the assignment groups for which they have authority
- amend timesheets for employees within the assignment groups that are delegated to them for up to 52 pay periods prior to the current pay period
- receive and grant delegation authority

A Dean or Director may delegate the ***Manager*** role to a selected individual, with the knowledge that in doing so, they are granting that person the authority/privileges outlined above. This would likely be a delegation that would be granted on a short-term basis (e.g. if a Dean or Director is on vacation).

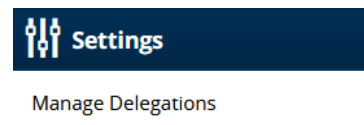
A Dean or Director may choose to delegate the ***Administration*** role, which grants the privileges as outlined above (with the exception of entering new hire information), however, all the entries made by the individual in the *Administration* role would require final *Manager* approval. This would likely be a delegation that would be granted on a longer-term basis (e.g. a Dean may choose to grant their Administrative Assistant the privileges noted above to assist with these responsibilities while still maintaining final approval).

A *Manager* has an approval level of 3, which is higher than the *Administration* approval level 2.

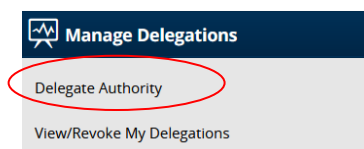
Delegate Authority

To delegate either role:

- Under the *Settings* area on the Manager Dashboard, click **Manage Delegations**



- The *Manage Delegations* window appears, click on **Delegate Authority**



- The *Enter Search Criteria* window appears, allowing the Manager to search for an assignment group.
- Enter your search criteria (i.e. Hu* to bring up a list of all those groups that begin with the letters Hu)

Enter Search Criteria

Group Description:

Cancel Search

You may use * as a wildcard. For instance, ab* would match abc or abbey.



You may use an asterisk * as a wildcard.

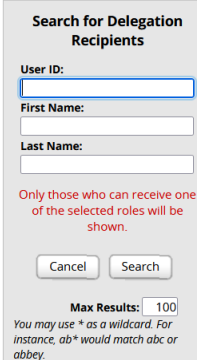
- Click **Search** to bring up the list of groups that correspond with the search criteria.

Choose Delegate Options				
Assignment Group	Role to Delegate	Effective Date	End Effective Date	Allow Re-delegation
<input type="checkbox"/> Human Resources (5)	Manager, Group	11/16/2022	11/23/2022	<input type="checkbox"/>
<input type="checkbox"/> Human Resources (Officer) (1)	Manager, Group	11/16/2022	11/23/2022	<input type="checkbox"/>
<input type="checkbox"/> Human Resources (Payroll) (2)	Manager, Group	11/16/2022	11/23/2022	<input type="checkbox"/>

Cancel Next

- Under the *Assignment Group* heading, click on the **checkbox** to the left of the group you wish to delegate
- Under the *Role to Delegate* heading, select the role you wish to delegate from the dropdown menu (i.e. Manager/Admin User, Group)
- Under the *Effective Date* heading, enter the effective date for the delegation
- Under the *End Effective Date* heading, enter the date that you would like the delegation to end

- To allow the delegation recipient to re-delegate the role and the rights associated with it, under the *Allow Re-delegation* heading, click the **checkbox**. If you do not wish to allow re-delegation, leave the checkbox unchecked.
- Click **Next**
- A *Search for Delegation Recipients* window appears; enter your search criteria for the individual to whom you want to delegate the role and corresponding rights.
- Click **Search**



Search for Delegation Recipients

User ID:

First Name:

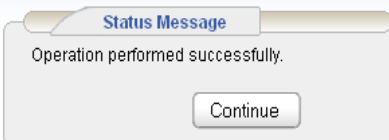
Last Name:

Only those who can receive one of the selected roles will be shown.

Max Results:

You may use * as a wildcard. For instance, ab* would match abc or abbey.

- A window appears with the *Search Results*, click on the name of the person to whom you will be delegating the assignment group (you are limited to one delegation recipient)
- Click **Select**
- A *Status Message* window appears, confirming whether or not the operation was performed successfully
- Click **Continue**



Status Message

Operation performed successfully.

NOTE

For the duration that you delegate a role and its associated rights, the delegation recipient's dashboard will provide access to the delegated role's corresponding links. For example, if you have delegated the role of Manager to an individual in your area, their dashboard will now have the links to approve timesheets for those in the delegated group, they will be able to amend, reject, or approve timesheets, receive emails regarding unapproved timesheets, run specified manager and time reports, hire new employees, etc.

Revoke a Delegation

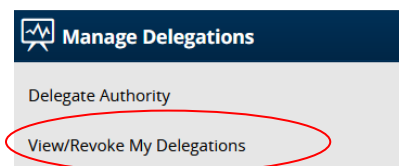
A Dean or Director may revoke a delegation at any time.

To revoke a delegation:

- Under the *Settings* area on the Manager Dashboard, click **Manage Delegations**
- The *Manage Delegations* window appears, click on **View/Revoke Delegations**
- A list of the Deans/Directors groups appears, along with any current delegations
- Find the row that contains the group delegation that you wish to revoke and click **Revoke** found under the *Actions* column



Manage Delegations



Delegations							Actions
Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	Role After Delegation	My Current Role	
Human Resources (Officer)	Employee	10/24/2022	10/31/2022	Manager/Admin User, Group	Manager/Admin User, Group	Manager/Admin User, Group	Revoke

Back

- The *Revoke Delegated Roles* window appears; depending on the situation, either check the *Revoke Effective* option to be **Immediate** OR **At the end of day on** <select date>
- Click **Revoke Delegation(s)** button

Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	My Current Role
Human Resources (Officer)	Employee Name	10/24/2022	10/31/2022	MANAGER_GROUP	MANAGER_GROUP

Revoke Effective ☐ Immediately ☒ At end of day on 10/24/2022

Revoke Delegation(s) Cancel

- The *Delegate Status Message* window appears stating, "Operation performed successfully."
- Click **Continue**

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