

## Contents

Overview .....	2
Introducing ADP Workforce Now Time & Attendance.....	2
The Time & Attendance Workflow Process .....	2
Stage and Descriptions.....	2
Roles and Responsibilities .....	3
The Time & Attendance Team Dashboard.....	3
Exploring the Team Dashboard .....	5
Things to Do Tile.....	5
Other Actions Tile.....	5
Who's In Today Tile .....	6
Editing Timecards .....	6
What are Timecard Exceptions? .....	6
Adding Missed Punches .....	7
Adding Notes to a Timecard Entry .....	9
Using the Individual Timecard to Edit Timecards.....	10
Adding Missed Punches to Correct a Time Pair Exception .....	12
Adding Missed Time-Out and Time-In Punches.....	15
Deleting Punches .....	17
Adding Notes to a Timecard .....	19
Adding Notes to an Entire Timecard .....	21
Correcting Department Transfers.....	23
Editing Timecards Summary.....	24
Completing Other Timecard Tasks .....	25
Setting Your Display Preferences .....	25
Reviewing Shifts .....	27
Approving Timecards.....	29
Reports .....	31
Reasons to Run a Report .....	31
Accessing Reports .....	31
Generating and Viewing Reports.....	32
Saving a Report .....	36

## Overview

This course prepares you to use ADP Workforce Now to edit timecards, fix timecard exceptions, and run reports.

## Introducing ADP Workforce Now Time & Attendance

With ADP Workforce Now Time & Attendance, you can easily collect your employee's time and attendance information and move it quickly and accurately through the payroll process.

This topic explains the stages of the Time & Attendance process and the roles involved in collecting time and attendance information.

### The Time & Attendance Workflow Process

This graphic provides a high-level view of the 3-step Time & Attendance process.



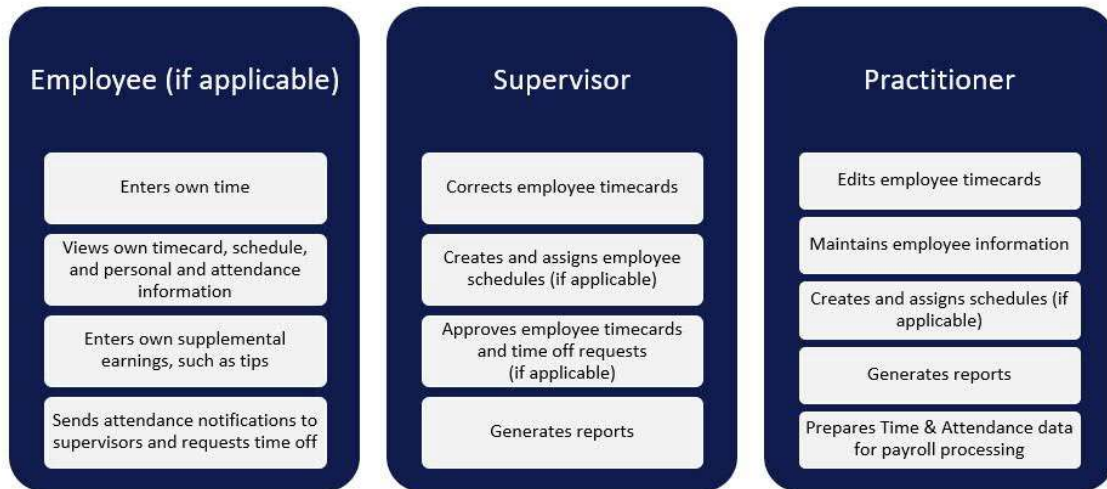
### Stages and Descriptions

The chart below provides a description of tasks completed in each stage of the process.

Stage	Description
Perform Time Entry	Employees enter their time data, and the entries are collected. Employees may use a physical time clock, badge swipe, fingerprint, mobile application, computer, or kiosk to enter time data. It is configured based on your company need. The application applies rounding rules, totals the hours, calculates overtime, and highlights missed entries and other exceptions.
Edit and Approve Timecards	You review and edit time information and generate reports. You can also approve time online, if your company is set up for this feature.
Prepare for Payroll Processing	Your practitioner closes the pay period (so no more entries can be made to Time & Attendance data), adjusts the payroll as necessary, submits the payroll to ADP, and then safely moves to a new pay period in Time & Attendance. The process begins again.

## Roles and Responsibilities

The graphic below details the roles and responsibilities for everyone involved in the Time & Attendance Workflow Process.

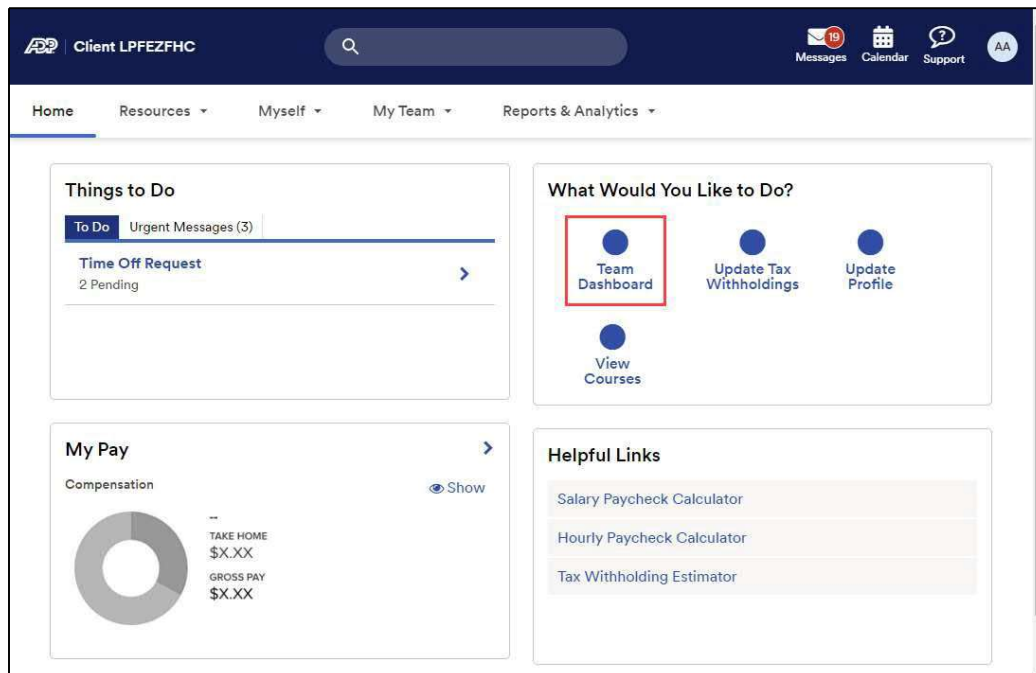


## The Time & Attendance Team Dashboard

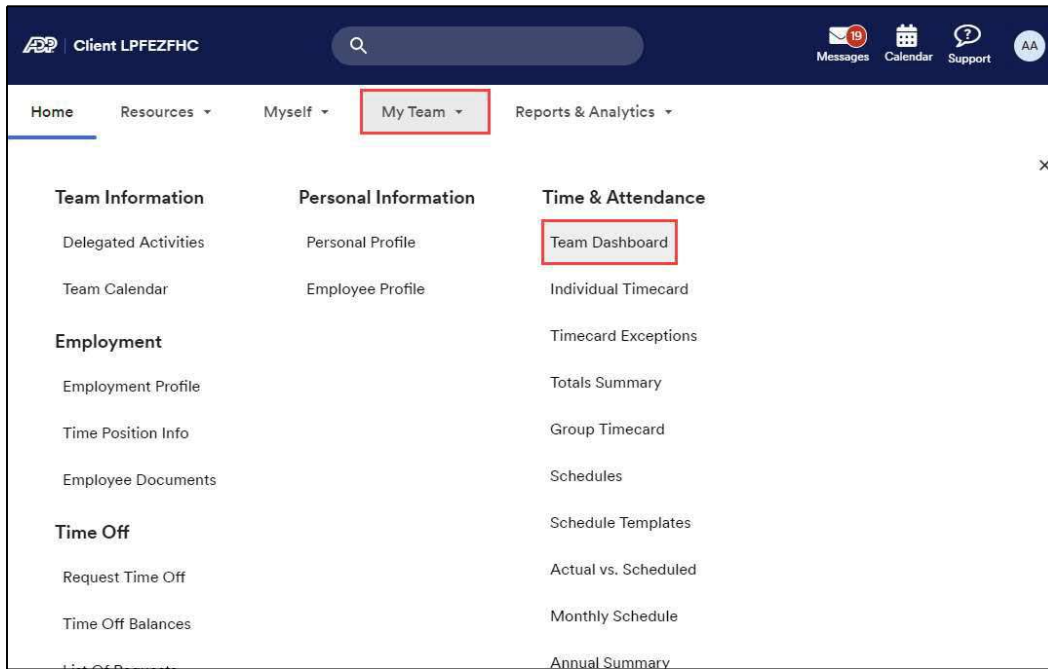
The Team Dashboard is the starting point for many of the Time & Attendance tasks you will need to complete. It provides you with a to-do list and an overview of key information you might need to help you manage your employees.

There are two ways to access the Team Dashboard:

1. From the **Home** page, click **Team Dashboard**.

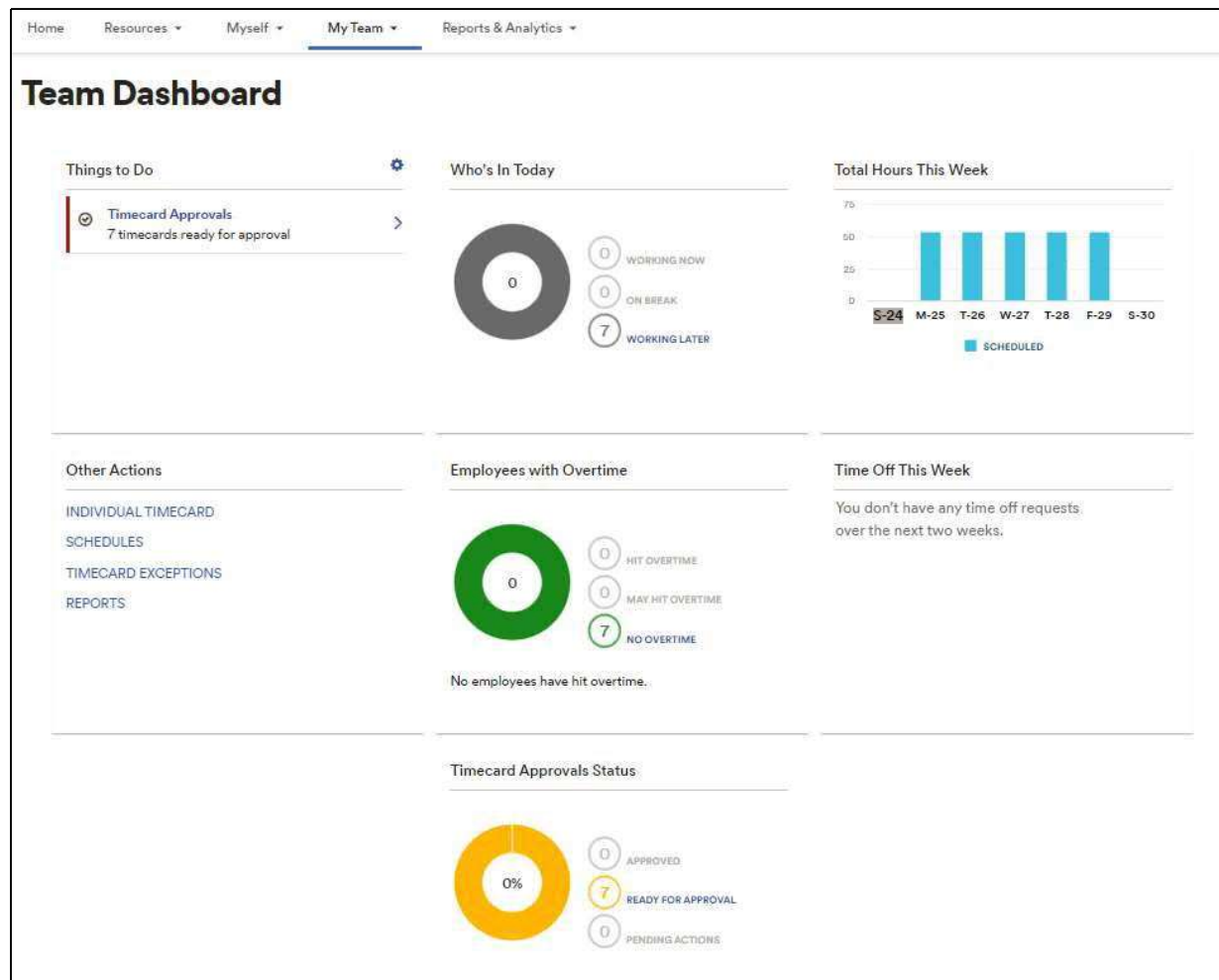


2. Click **My Team** from the menu, find **Time & Attendance** and select **Team Dashboard**.



## Exploring the Team Dashboard

On the Team Dashboard page, there is an overview of key information, along with quick and easy access to critical tasks. You may want to mark this page as a favorite.



### Things to Do Tile

In the **Things to Do** tile, you have a list of items that require action, such as missing punches that you need to enter and timecards that you need to approve.

When making corrections, you want to make sure you complete Missed Punches before you do the Approvals. Some exceptions are errors, warning, and messages. Zero hours are considered errors and must be corrected before payroll can be completed.

### Other Actions Tile

Under **Other Actions**, you can quickly access other Time & Attendance pages to view an individual employee's timecard, assign your employees to schedules, or run reports. The other tiles on this page provide you with important information you can use to manage your employees.

## Who's In Today Tile

The **Who's In Today** tile gives you a visual of how many of your employees are currently working, how many are clocked out for break, and how many are scheduled to come in later.

Clicking the action icon gives you a breakdown with names.

## Employees with Overtime Tile

In the **Employees with Overtime** tile, you can see if anyone has reached overtime hours or is predicted to reach overtime hours.

## Timecard Approval Status Tile

The **Timecard Approvals Status** tile shows you how many timecards need your approval. We'll look at timecard approvals in more detail later.

## Total Hours This Week Tile

The **Total Hours This Week** tile, you can see the regular and overtime hours worked, along with the hours scheduled for the week.

## Editing Timecards

One of the most important daily tasks is to edit employees' timecards to make corrections and to locate and fix timecard exceptions.

### What are Timecard Exceptions?

Timecard exceptions are a way of notifying you that time entries differ from what is expected, and may need intervention before the payroll can be processed. Not all exceptions require action. For example, if an employee uses a schedule and clocks out an hour earlier than the scheduled time, an exception will result. However, you will not need to edit the timecard for this exception for the payroll to be processed.

Here are some examples of timecard exceptions:

- The timecard is missing hours.
- The timecard is missing an in or out time.
- The employee has clocked out early or late.
- The number of hours in the schedule does not match the number of hours worked.
- The timecard is missing supervisor approval.

### Best Practices

You should clear exceptions on a daily basis. You can easily locate and fix timecard exceptions from the Team Dashboard.

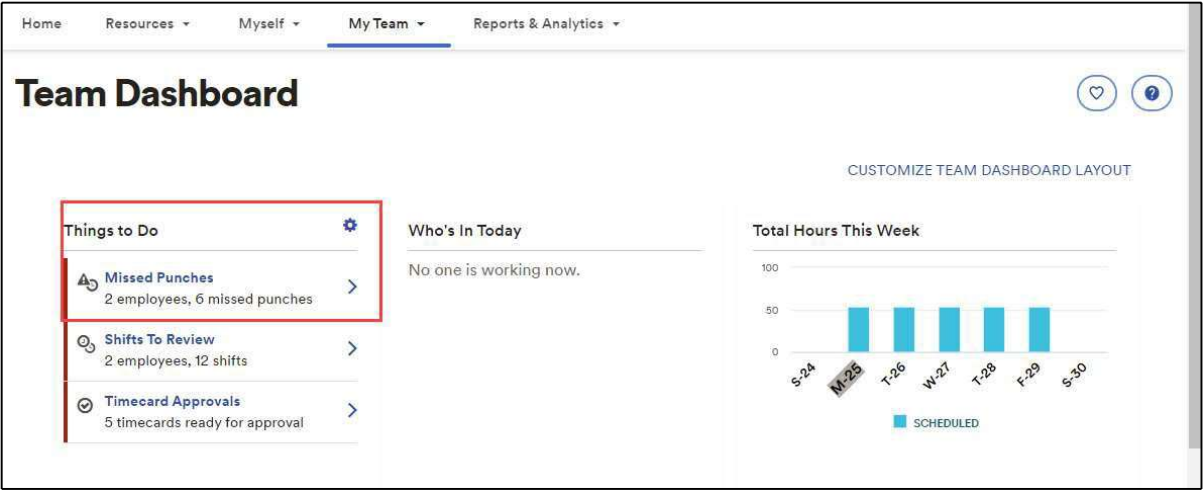
## Adding Missed Punches

You may have heard the term “time pair.” A time pair represents a set of in and out times. Every “in” time on a timecard must have a corresponding “out” time. An exception is generated if one entry is missing from a time pair that must be corrected before a payroll can be processed.

**Scenario:** The Team Dashboard shows that there are some employees with missed punches. Add the missing punches to fix the exceptions.

Follow the steps below to add missing punches to fix the exceptions. Start on the Team Dashboard and select: **My Team > Time & Attendance > Team Dashboard.**

When making corrections, complete missed punches before you do timecard approvals. Missed punches are errors and must be corrected before payroll can be processed.

Step	Action
1	<p>In the <b>Things to Do</b> tile, click the action arrow for <b>Missed Punches</b>.</p> 

2 The question mark indicates the errors. The employee punched in at 9:00am but did not punch out. Click the cell and enter the time the employee actually punched in or out. Type in the actual number and then type **a** for **am** or **p** for **pm**. (Example: For 5:00 PM, enter 5p.)

Back

### Missed Punches

Which missed punches would you like to resolve today Anthony? Missed Punches  
2 Employees, 6 Missed Punches

Notes	Date	IN - OUT	Department
East, Donald ☎ : 404-859-9585 🏠 : Not Available ✉ : L_P_DEast_Dig_Cert@ADP.com			VIEW TIMECARD >
<input type="checkbox"/>	Wed 03/16	09:00 AM - 05:00 PM	008000
<input type="checkbox"/>	Thu 03/17	09:00 AM - ?	008000
<input type="checkbox"/>		08:30 AM	

Cancel
Save

3 You will receive confirmation of the corrected punch error. Scroll down and correct any other remaining errors.

Back

### Missed Punches

Which missed punches would you like to resolve today Anthony? Missed Punches  
1 Employee, 4 Missed Punches

✔

**Congrats Anthony!**

You resolved some missed punches but there is still more work to do! Rest assured your changes are saved but it may take us a few more seconds to update other areas of the dashboard.

✕

Notes	Date	IN - OUT	Department
Fager, Charles ☎ : 401-929-0662 🏠 : Not Available ✉ : cfager@geneva.com			VIEW TIMECARD >
<input type="checkbox"/>	Wed 03/16	09:00 AM - ? 08:30 AM - 05:00 PM	009000

Cancel
Save



### Adding Notes to a Timecard Entry

When you want to explain actions taken on a timecard entry, you can add a note to the timecard.

**Scenario:** The employee's schedule is 8:30 – 5:00pm as indicated on the screen. They were late 30 minutes and punched in at 9:00 am. They worked through lunch to make up the time and forgot to punch out at the end of the shift.

Step	Action																
1	<p>To add a note, click the paper icon on the left of the page.</p> <div style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Back</span> <h3>Missed Punches</h3> </div> <p>Which missed punches would you like to resolve today Anthony? <span style="float: right;">Missed Punches 1 Employee, 3 Missed Punches</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Notes</th> <th style="width: 20%;">Date</th> <th style="width: 40%;">IN - OUT</th> <th style="width: 25%;">Department</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td>Wed 03/16 <small>Schedule</small></td> <td>09:00 AM - 05:00 PM <small>08:30 AM - 05:00 PM</small></td> <td>009000</td> </tr> <tr> <td style="text-align: center;"></td> <td>Fri 03/18 <small>Schedule</small></td> <td>09:00 AM - ? <small>08:30 AM - 05:00 PM</small></td> <td>009000</td> </tr> <tr> <td style="text-align: center;"></td> <td>Tue 03/22</td> <td>09:00 AM - 03:30 PM</td> <td>009000</td> </tr> </tbody> </table> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <span>Cancel</span> <span style="border: 2px solid red; background-color: #0056b3; color: white; padding: 5px 15px;">Save</span> </div> </div>	Notes	Date	IN - OUT	Department		Wed 03/16 <small>Schedule</small>	09:00 AM - 05:00 PM <small>08:30 AM - 05:00 PM</small>	009000		Fri 03/18 <small>Schedule</small>	09:00 AM - ? <small>08:30 AM - 05:00 PM</small>	009000		Tue 03/22	09:00 AM - 03:30 PM	009000
Notes	Date	IN - OUT	Department														
	Wed 03/16 <small>Schedule</small>	09:00 AM - 05:00 PM <small>08:30 AM - 05:00 PM</small>	009000														
	Fri 03/18 <small>Schedule</small>	09:00 AM - ? <small>08:30 AM - 05:00 PM</small>	009000														
	Tue 03/22	09:00 AM - 03:30 PM	009000														

2

Enter the note. You have the option to make the note viewable to the employee by toggling the indicator to On. Then click **Save**.

**Result:** The note is saved. You can continue to enter missing punches.

The screenshot shows a web interface titled "All Notes". At the top left is a "Back" button. Below the title, the name "Fager, Charles" is displayed. A table contains the following data:

DATE	IN - OUT	PAY CODE	HOURS	DEPARTMENT
Wednesday 16 Mar 2022	9:00 AM -		0.00	009000

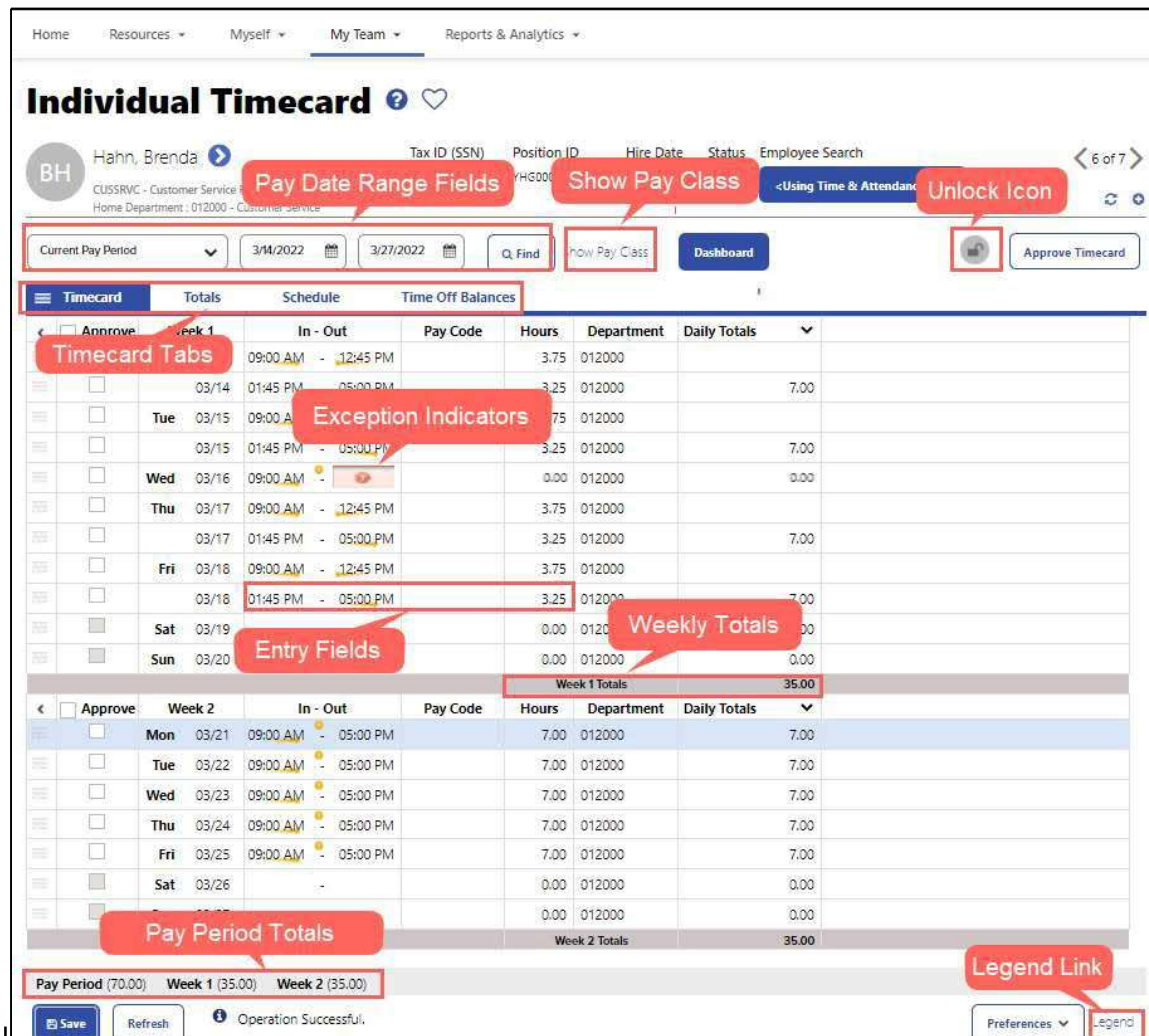
Below the table, a note for "Albright, Anthony" is shown. To the right of the note is a red arrow pointing to a toggle switch labeled "OFF" and "Employee Viewable". Below the note is a text input field containing the text: "Charles worked through lunch to make up the 30 minutes he was late." At the bottom of the interface are two buttons: "CANCEL" and "SAVE". The "SAVE" button is highlighted with a red box.

### Using the Individual Timecard to Edit Timecards

There might be times when you cannot fix all of an employee's timecard exceptions from this Missed Punches page. In that case, you can easily navigate to the employee's Individual Timecard.

**Explore: The Individual Timecard Page**

To view individual timecards, go to the Team Dashboard and select: **My Team > Time & Attendance > Individual Timecard.**



Element	Description
Pay Date Range Fields	These fields indicate the time period for which information is currently being displayed. You can change the time period; however, time periods in the past are read only.
Show Pay Class Link	Click this link to view a summary of how the employee records time and how the employee's time is calculated, such as how punches are rounded and how overtime is calculated.
Unlock Icon	The Unlock icon indicates the ability to edit a timecard. When the time cycle is unlocked, updates can be made to a timecard if you have edit privileges. If the time cycle is locked, you will not be able to make any further changes.
Timecard Tabs	These tabs open a timecard view, based on your features, such as Totals, Schedule, and Time Off Balances. On the timecard tab, you can add a note, print or reprocess the timecard.
Exception Indicators	These indicators convey information about an entry. Pointing to an exception indicator displays a description of that indicator.

Entry Fields	These fields display in and out times and the total hours worked.
Weekly Totals Row	This row displays totals for each week within the pay period or the selected date range.
Pay Period Totals Row	This row displays totals in a fixed row at the bottom of the individual timecard.
Legend Link	When clicked, this link displays a description of all timecard indicators.

### Adding Missed Punches to Correct a Time Pair Exception

Punches must be in time-pairs, meaning that if there is a punch in, there must be a punch out. When punches are missing, time-pair exceptions are generated. You must resolve these exceptions so the application can calculate the employee's total hours.

**Scenario:** The employee punched in for their shift but forgot to punch out.

Access the individual timecard. **My Team > Time & Attendance > Individual Timecard.**

Step	Action
1	Click the link on the <b>Employee Search</b> bar.

The screenshot shows the 'Individual Timecard' page for Frank Cavallo. At the top, there are navigation tabs: Home, Resources, Myself, My Team, and Reports & Analytics. Below this, the employee's name 'Cavallo, Frank' is displayed along with his photo and a blue arrow icon. To the right, there are fields for Tax ID (SSN), Position ID, Hire Date, and Status. The 'Employee Search' bar is highlighted with a red box and contains the text '<Using Time & Attendance>' and a search icon. Below the search bar, there are buttons for 'Current Pay Period', '3/14/2022', '3/27/2022', 'Q Find', 'Show Pay Class', 'Dashboard', and 'Approve Timecard'. At the bottom, there is a table with columns for 'Approve', 'Week 1', 'In - Out', 'Pay Code', 'Hours', 'Department', and 'Daily Totals'. The table shows data for Monday through Thursday, with all hours set to 0.00.

2

Enter the employee's name in the **Search** field or select the employee's name.

**Result:** The timecard for the employee you selected displays.

The screenshot shows the 'Individual Timecard' interface. An 'Employee Search' modal is open, displaying a search bar and a list of employees. The search bar is highlighted with a red box. The search results table is also highlighted with a red box. The table lists employees with their names and position IDs.

#	NAME	POSITION ID
1	Cavallo, Frank	YHG000146
2	Duncan, Heather	YHG000164
3	East, Donald	YHG000137
4	Evers, Thomas	YHG000060
5	Fager, Charles	YHG000100
6	Hahn, Brenda	YHG000163
7	Johnson, Kenneth	YHG000160

3 In the row with the missing punch, right-click the punch and select **Insert Time**.  
**Result:** The time automatically moves to the Out field in the same row.

The screenshot shows the 'Individual Timecard' for Donald East. The interface includes navigation tabs (Home, Resources, Myself, My Team, Reports & Analytics) and a header with employee details (Tax ID, Position ID, Hire Date, Status, Employee Search). Below this is a 'Current Pay Period' section with dates 3/14/2022 and 3/27/2022, and buttons for 'Q Find', 'Show Pay Class', 'Dashboard', and 'Approve Timecard'. The main table has columns for 'Approve', 'Week 1', 'In - Out', 'Pay Code', 'Hours', 'Department', and 'Daily Totals'. The table shows data for Monday through Sunday. On Wednesday, 03/16, the 'In' time is 09:00 AM and the 'Out' time is missing. A context menu is open over the missing 'Out' time, with 'Insert Time' selected.

Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals
<input type="checkbox"/>	Mon 03/14	07:00 AM - 10:00 PM		15.00	008000	15.00
<input type="checkbox"/>	Tue 03/15	07:00 AM - 06:00 PM		11.00	008000	11.00
<input type="checkbox"/>	Wed 03/16	09:00 AM -		8.00	008000	8.00
<input type="checkbox"/>	Thu 03/17	09:00 AM		8.00	008000	8.00
<input type="checkbox"/>	Fri 03/18	09:00 AM		8.00	008000	8.00
<input type="checkbox"/>	Sat 03/19			0.00	008000	0.00
<input type="checkbox"/>	Sun 03/20			0.00	008000	0.00

4 Enter the time the employee forgot to punch, and click **Save**.

**Tips:**

- Enter **am** or **pm** to automatically advance to the next field.
- It is not necessary to enter a colon or 00.

The screenshot shows the 'Individual Timecard' for Donald East. The interface is similar to the previous screenshot. In the table, the 'Out' time for Wednesday, 03/16, is now '5H'. At the bottom of the interface, there are buttons for 'Save', 'Refresh', 'Preferences', and 'Legend'. The 'Save' button is highlighted with a red box.

Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals
<input type="checkbox"/>	Mon 03/14	07:00 AM - 10:00 PM		15.00	008000	15.00
<input type="checkbox"/>	Tue 03/15	07:00 AM - 06:00 PM		11.00	008000	11.00
<input type="checkbox"/>	Wed 03/16	09:00 AM - 5H		8.00	008000	8.00
<input type="checkbox"/>	Thu 03/17	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Fri 03/18	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Sat 03/19			0.00	008000	0.00
<input type="checkbox"/>	Sun 03/20			0.00	008000	0.00
<b>Week 1 Totals</b>						<b>50.00</b>

Pay Period (90.00) Week 1 (50.00) Week 2 (40.00)


## Adding Missed Time-Out and Time-In Punches

In some cases, employees may forget to punch out either for their meals or at the end of day. You can add multiple missed punches by inserting a new row in the timecard.

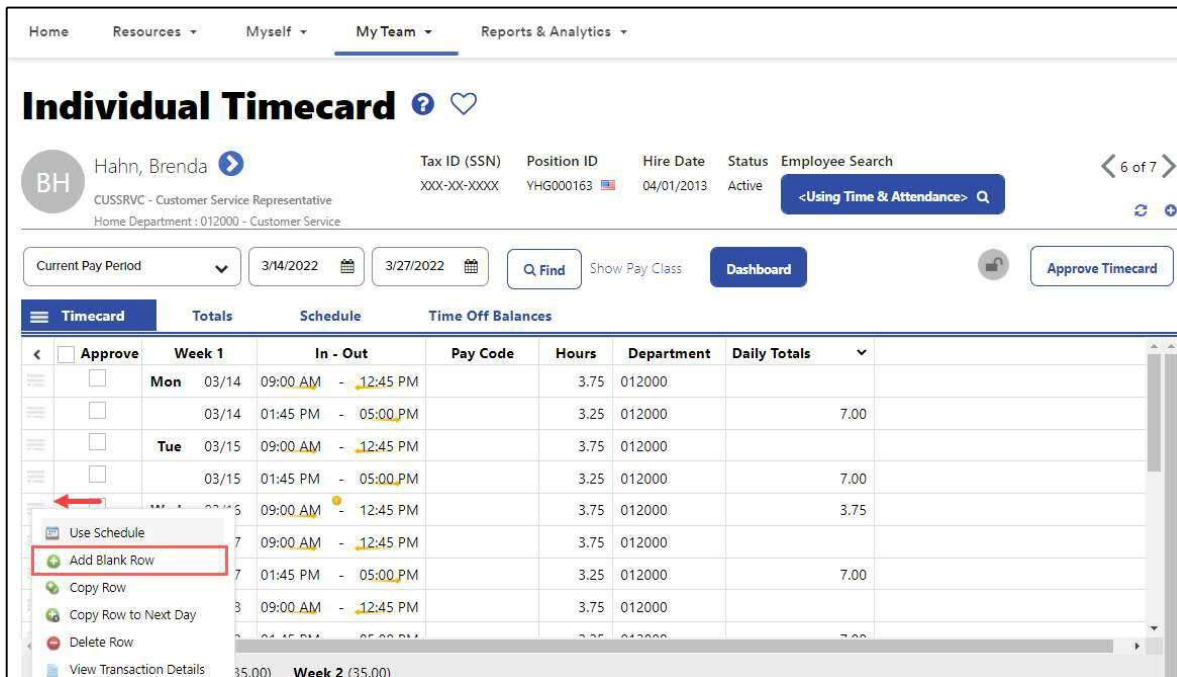
**Scenario:** The employee forgot to punch out for a meal and forgot to punch in when they returned from the meal. They also forgot to punch out at the end of the shift.

Access the individual timecard. **My Team > Time & Attendance > Individual Timecard**

Step	Action
1	Locate the employee's timecard that has the missing punch.
2	In the row with the missing punch, in the <b>Out</b> field, enter the time that the employee left.

3 In the same row, click  (row menu icon) and select **Add Blank Row**.

**Result:** A new row is inserted for that day. A new row is required as In/Out must be a pair. So you must create a new time pair for punching in from the meal and out at the end of the shift.



The screenshot shows the 'Individual Timecard' interface for Brenda Hahn. The 'Timecard' tab is active, displaying a table with columns for 'Week 1', 'In - Out', 'Pay Code', 'Hours', 'Department', and 'Daily Totals'. A row menu is open over the row for Wednesday, 03/15, 01:45 PM - 05:00 PM, with the 'Add Blank Row' option highlighted in red. Other options in the menu include 'Use Schedule', 'Copy Row', 'Copy Row to Next Day', 'Delete Row', and 'View Transaction Details'.

4 In the new row for that day, in the **In** field, enter the time that the employee returned from the meal.

**Note:** The blue corner on the row menu indicates changes that have not been saved. The indicator is removed when changes are saved.

	Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals
	<input type="checkbox"/>	Mon 03/14	09:00 AM - 12:45 PM		3.75	012000	
	<input type="checkbox"/>	03/14	01:45 PM - 05:00 PM		3.25	012000	7.00
	<input type="checkbox"/>	Tue 03/15	09:00 AM - 12:45 PM		3.75	012000	
	<input type="checkbox"/>	03/15	01:45 PM - 05:00 PM		3.25	012000	7.00
	<input type="checkbox"/>	Wed 03/16	09:00 AM - 12:45 PM		3.75	012000	
	<input type="checkbox"/>	03/16	145p -		0.00	012000	3.75
	<input type="checkbox"/>	Thu 03/17	09:00 AM - 12:45 PM		3.75	012000	



5

In the **Out** field, enter the time that the employee left for the day. Click **Save**.

<input type="checkbox"/>	Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals	
<input type="checkbox"/>		Mon 03/14	09:00 AM - 12:45 PM		3.75	012000		
<input type="checkbox"/>		03/14	01:45 PM - 05:00 PM		3.25	012000	7.00	
<input type="checkbox"/>		Tue 03/15	09:00 AM - 12:45 PM		3.75	012000		
<input type="checkbox"/>		03/15	01:45 PM - 05:00 PM		3.25	012000	7.00	
<input type="checkbox"/>		Wed 03/16	09:00 AM - 12:45 PM		3.75	012000		
<input type="checkbox"/>		03/16	01:45 PM - 05:00 PM		3.25	012000	7.00	
<input type="checkbox"/>		Thu 03/17	09:00 AM - 12:45 PM		3.75	012000		
<input type="checkbox"/>		03/17	01:45 PM - 05:00 PM		3.25	012000	7.00	
<input type="checkbox"/>		Fri 03/18	09:00 AM - 12:45 PM		3.75	012000		

Pay Period (70.00) Week 1 (35.00) Week 2 (35.00)

### Deleting Punches

You may encounter various situation in which you need to delete a punch.

**Scenario:** The employee punched in for the day and then stopped to talk to a coworker. They forgot they already punched in and did it again five minutes later. This punch created a new row with just the In punch and generated a missing Out punch exception. The incorrect punch must be deleted.

Access the individual timecard. **My Team > Time & Attendance > Individual Timecard**

Step

Action

1

Locate the employee's timecard that has the extra punch.

Home Resources Myself **My Team** Reports & Analytics

## Individual Timecard

East, Donald Tax ID (SSN) XXX-XX-XXXX Position ID YHG000137 Hire Date 02/01/2000 Status Active Employee Search < 3 of 7 >

ATL-SALE - Sales Executive Home Department : 008000 - Sales <Using Time & Attendance>

Current Pay Period 3/14/2022 3/27/2022 Q Find Show Pay Class Dashboard Approve Timecard

Timecard	Totals	Schedule	Time Off Balances				
<input type="checkbox"/>	Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals
<input type="checkbox"/>		Mon 03/14	07:00 AM - 10:00 PM		15.00	008000	15.00
<input type="checkbox"/>		Tue 03/15	07:00 AM - 06:00 PM		11.00	008000	11.00
<input type="checkbox"/>		Wed 03/16	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>		Thu 03/17	09:00 AM -		0.00	008000	
<input type="checkbox"/>		03/17	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>		Fri 03/18	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>		Sat 03/19	-		0.00	008000	0.00

2

In the row for the day with the incorrect punch, right-click in the **In** or **Out** field that contains the punch you want to delete.

Select **Delete Time**.

The screenshot shows the 'Individual Timecard' page for Donald East. The interface includes navigation tabs (Home, Resources, Myself, My Team, Reports & Analytics) and a header with employee details (Name, Tax ID, Position ID, Hire Date, Status, Employee Search). Below this is a 'Current Pay Period' section with dates 3/14/2022 and 3/27/2022, and buttons for 'Find', 'Dashboard', and 'Approve Timecard'. The main table is divided into 'Totals', 'Schedule', and 'Time Off Balances' tabs. The 'Schedule' tab is active, showing a table with columns: Approve, Week, In - Out, Pay Code, Hours, Department, and Daily Totals. A context menu is open over the 'In - Out' field for the row on Friday, 03/18, with 'Delete Time' highlighted. Other options in the menu include 'Insert Time' and 'Add Note'.

Approve	Week	In - Out	Pay Code	Hours	Department	Daily Totals
<input type="checkbox"/>	Mon 03/14	07:00 AM - 10:00 PM		15.00	008000	15.00
<input type="checkbox"/>	Tue 03/15	07:00 AM - 06:00 PM		11.00	008000	11.00
<input type="checkbox"/>	Wed 03/16	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Thu 03/17	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Fri 03/18	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Sat 03/19	-		0.00	008000	0.00
<input type="checkbox"/>	Sun 03/20	-		0.00	008000	0.00
Week 1 Totals						50.00

3

Click **Save**.

**Result:** The correct time from the second row moves to the Out field in the first row, replacing the incorrect time. The second row has no data and is automatically removed.

The screenshot shows the 'Individual Timecard' page after the 'Delete Time' action. The table now shows the updated schedule for Week 1. The row for Wednesday, 03/16, is highlighted with a red box. The 'In - Out' field for this row now shows '09:00 AM - 05:00 PM', which was the correct time from the previous row. The row for Thursday, 03/17, is now empty. The 'Week 1 Totals' remain at 50.00. At the bottom of the page, there are buttons for 'Save', 'Refresh', and 'Preferences', along with a message 'Operation Successful!'.

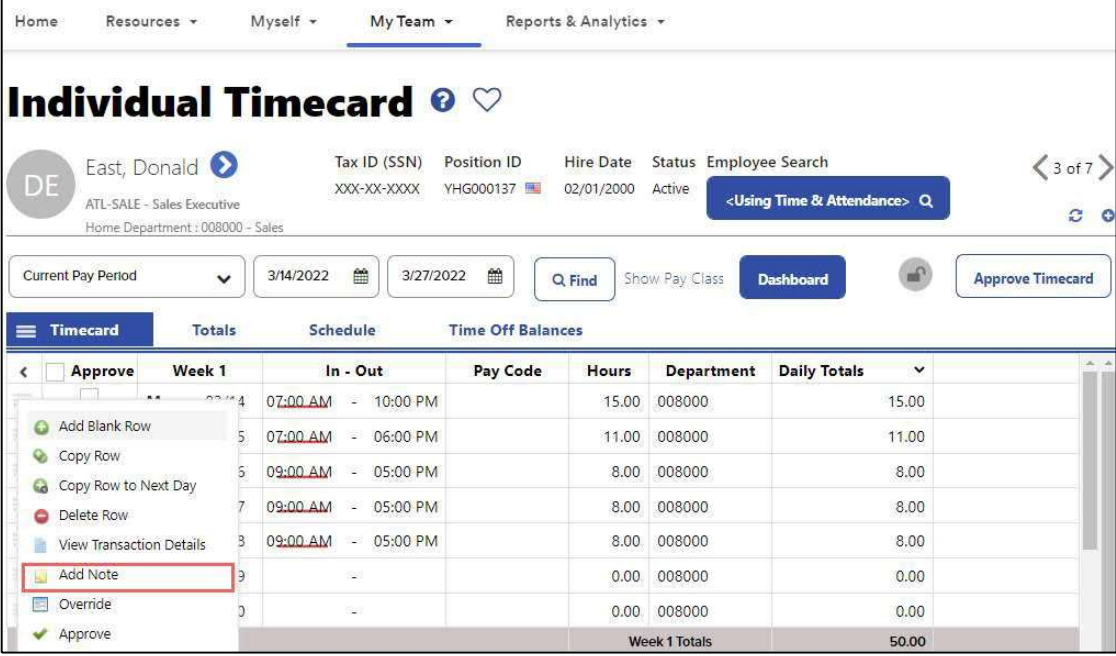
Approve	Week	In - Out	Pay Code	Hours	Department	Daily Totals
<input type="checkbox"/>	Mon 03/14	07:00 AM - 10:00 PM		15.00	008000	15.00
<input type="checkbox"/>	Tue 03/15	07:00 AM - 06:00 PM		11.00	008000	11.00
<input type="checkbox"/>	Wed 03/16	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Thu 03/17	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Fri 03/18	09:00 AM - 05:00 PM		8.00	008000	8.00
<input type="checkbox"/>	Sat 03/19	-		0.00	008000	0.00
<input type="checkbox"/>	Sun 03/20	-		0.00	008000	0.00
Week 1 Totals						50.00
<input type="checkbox"/>	Mon 03/21	08:30 AM - 04:30 PM		8.00	008000	8.00

Pay Period (90.00) Week 1 (50.00) Week 2 (40.00)

Save Refresh Operation Successful! Preferences Legend

## Adding Notes to a Timecard

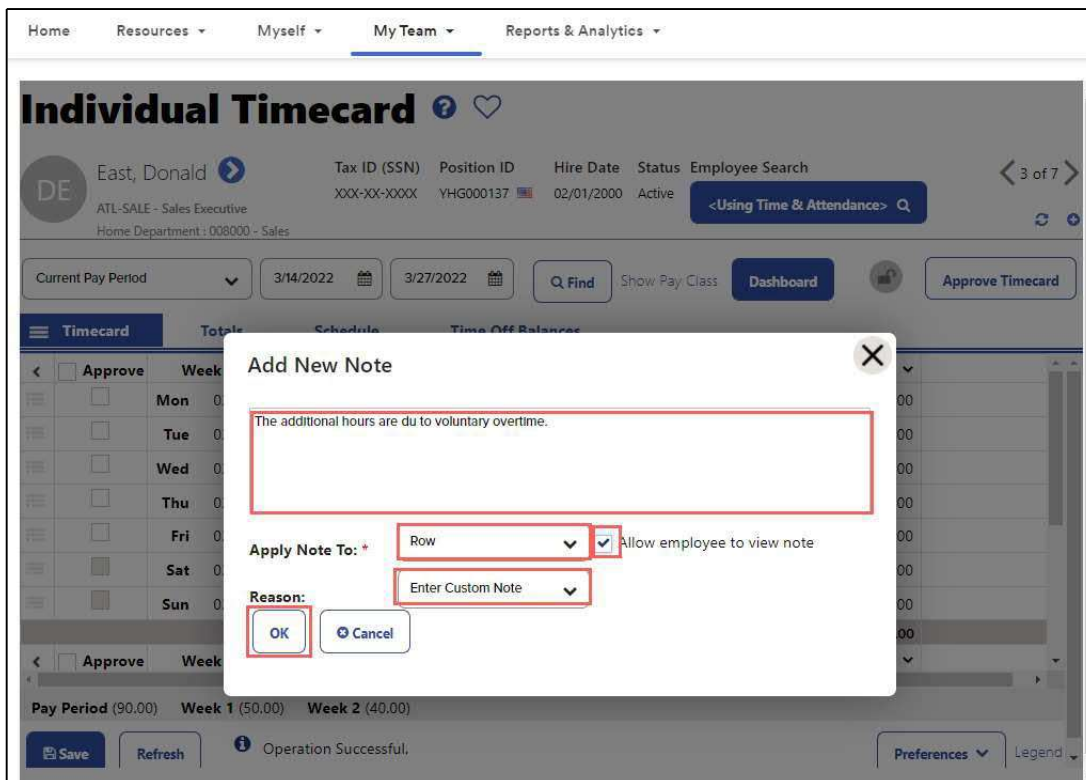
You have already learned how to add notes when correcting missed punches. You can do the same thing from the Individual Timecard page. Follow the steps below to add a note to a timecard.

Step	Action																																																															
1	<p>In the row where you want to add a note, click the row menu and select <b>Add Note</b>.</p>  <p>The screenshot displays the 'Individual Timecard' page for Donald East. The interface includes a navigation bar with 'Home', 'Resources', 'Myself', 'My Team', and 'Reports &amp; Analytics'. Below the header, there is a section for the employee's details: 'East, Donald', 'ATL-SALE - Sales Executive', 'Home Department: 008000 - Sales', 'Tax ID (SSN): XXX-XX-XXXX', 'Position ID: YHG000137', 'Hire Date: 02/01/2000', and 'Status: Active'. A search bar contains '&lt;Using Time &amp; Attendance&gt;'. The main area features a 'Current Pay Period' dropdown set to '3/14/2022' to '3/27/2022', a 'Q Find' search box, and buttons for 'Dashboard' and 'Approve Timecard'. A tabbed interface shows 'Timecard', 'Totals', 'Schedule', and 'Time Off Balances'. The 'Timecard' tab is active, displaying a table with columns: 'Approve', 'Week 1', 'In - Out', 'Pay Code', 'Hours', 'Department', and 'Daily Totals'. The table contains several rows of punch data. A row menu is open over the row with 'In - Out' '09:00 AM - 05:00 PM' and 'Hours' '8.00'. The menu options are: 'Add Blank Row', 'Copy Row', 'Copy Row to Next Day', 'Delete Row', 'View Transaction Details', 'Add Note' (highlighted with a red box), 'Override', and 'Approve'. The 'Week 1 Totals' row shows a total of '50.00' hours.</p> <table border="1"> <thead> <tr> <th>Approve</th> <th>Week 1</th> <th>In - Out</th> <th>Pay Code</th> <th>Hours</th> <th>Department</th> <th>Daily Totals</th> </tr> </thead> <tbody> <tr> <td></td> <td>4</td> <td>07:00 AM - 10:00 PM</td> <td></td> <td>15.00</td> <td>008000</td> <td>15.00</td> </tr> <tr> <td></td> <td>5</td> <td>07:00 AM - 06:00 PM</td> <td></td> <td>11.00</td> <td>008000</td> <td>11.00</td> </tr> <tr> <td></td> <td>5</td> <td>09:00 AM - 05:00 PM</td> <td></td> <td>8.00</td> <td>008000</td> <td>8.00</td> </tr> <tr> <td></td> <td>7</td> <td>09:00 AM - 05:00 PM</td> <td></td> <td>8.00</td> <td>008000</td> <td>8.00</td> </tr> <tr> <td></td> <td>3</td> <td>09:00 AM - 05:00 PM</td> <td></td> <td>8.00</td> <td>008000</td> <td>8.00</td> </tr> <tr> <td></td> <td>9</td> <td>-</td> <td></td> <td>0.00</td> <td>008000</td> <td>0.00</td> </tr> <tr> <td></td> <td>0</td> <td>-</td> <td></td> <td>0.00</td> <td>008000</td> <td>0.00</td> </tr> <tr> <td colspan="6"><b>Week 1 Totals</b></td> <td><b>50.00</b></td> </tr> </tbody> </table>	Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals		4	07:00 AM - 10:00 PM		15.00	008000	15.00		5	07:00 AM - 06:00 PM		11.00	008000	11.00		5	09:00 AM - 05:00 PM		8.00	008000	8.00		7	09:00 AM - 05:00 PM		8.00	008000	8.00		3	09:00 AM - 05:00 PM		8.00	008000	8.00		9	-		0.00	008000	0.00		0	-		0.00	008000	0.00	<b>Week 1 Totals</b>						<b>50.00</b>
Approve	Week 1	In - Out	Pay Code	Hours	Department	Daily Totals																																																										
	4	07:00 AM - 10:00 PM		15.00	008000	15.00																																																										
	5	07:00 AM - 06:00 PM		11.00	008000	11.00																																																										
	5	09:00 AM - 05:00 PM		8.00	008000	8.00																																																										
	7	09:00 AM - 05:00 PM		8.00	008000	8.00																																																										
	3	09:00 AM - 05:00 PM		8.00	008000	8.00																																																										
	9	-		0.00	008000	0.00																																																										
	0	-		0.00	008000	0.00																																																										
<b>Week 1 Totals</b>						<b>50.00</b>																																																										

2

Complete the information:

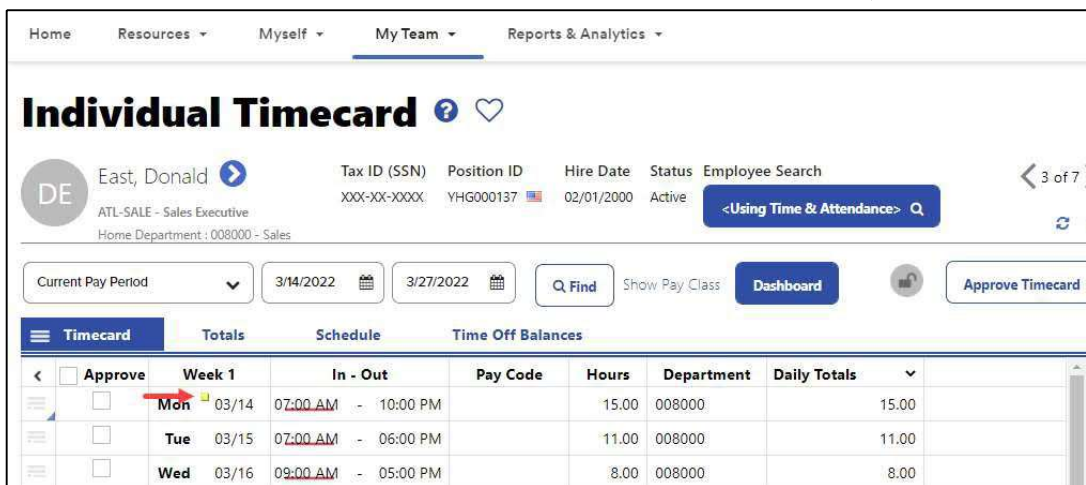
- In the **Comments** field, enter a note.
- In the **Apply Note To** field, select the element to which the note applies.
- Select **Allow employee to view note** (if applicable).
- Select the **Reason** code (if applicable).



3

Click **OK**.

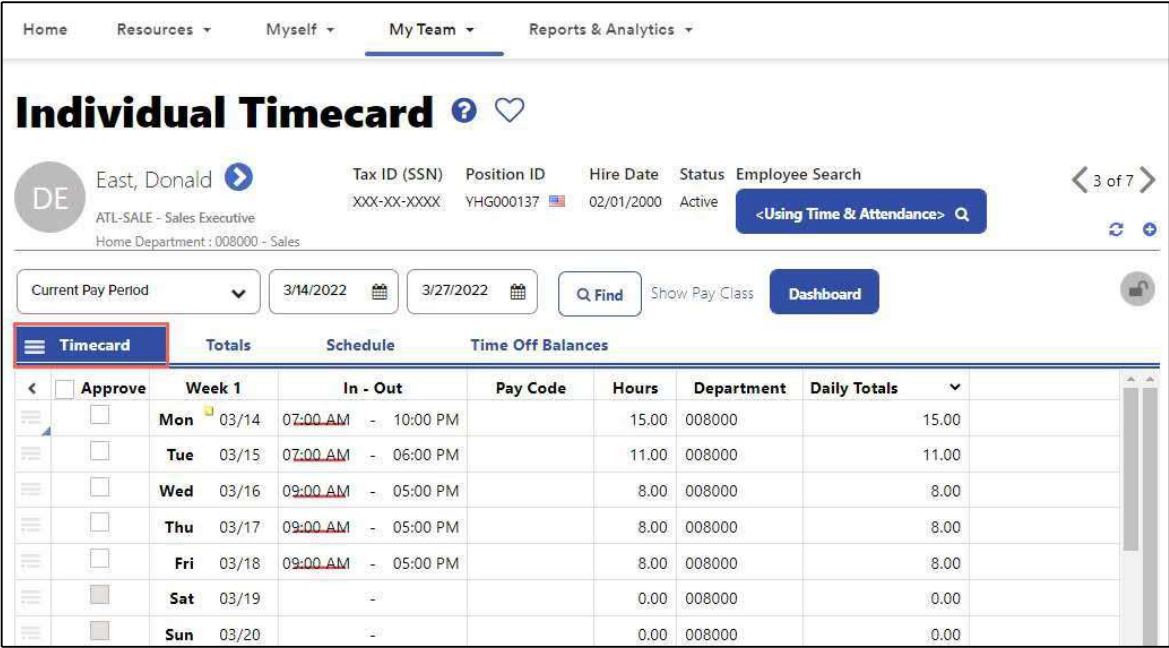
**Result:** The note indicator is now visible on the timecard. You can point to it to display the contents of the note.



## Adding Notes to an Entire Timecard

To add a note to an entire timecard, click  (timecard menu) instead of  (row menu).

Step	Action
1	Click to open the timecard menu.

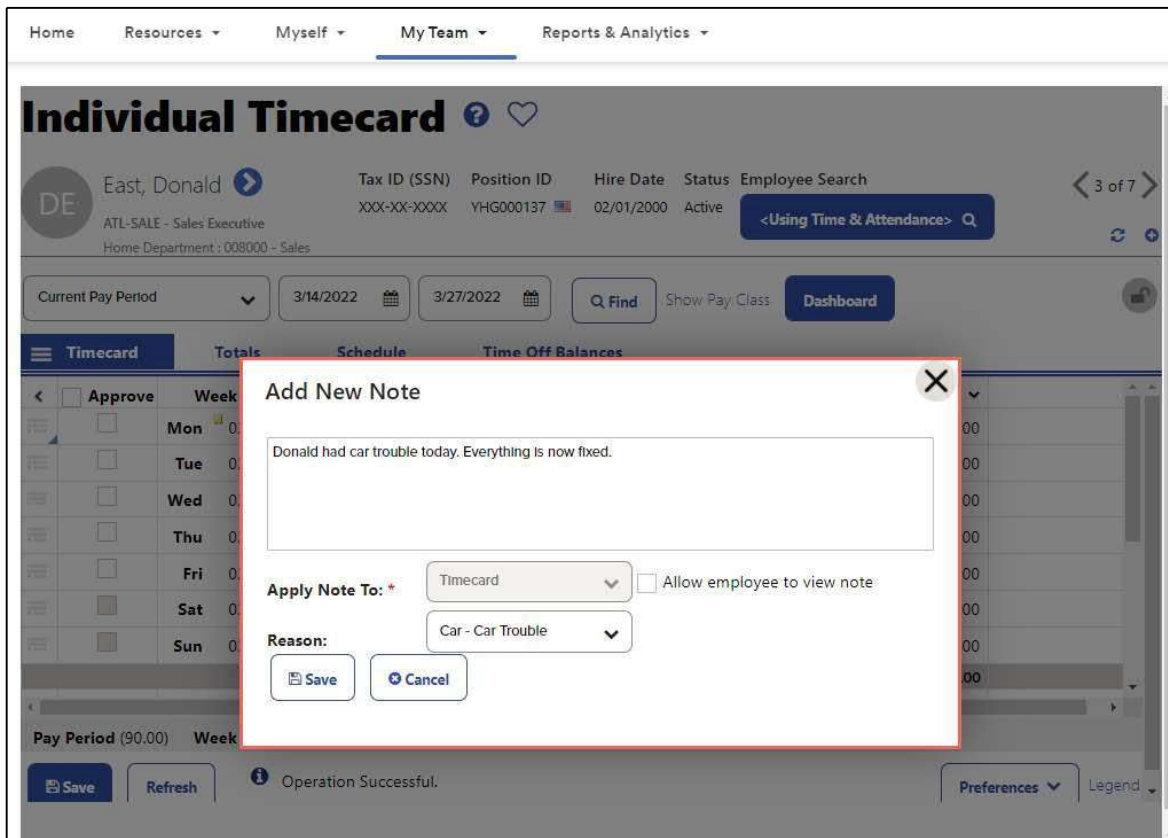
  


Individual Timecard									
East, Donald		Tax ID (SSN)	Position ID	Hire Date	Status	Employee Search		< 3 of 7 >	
ATL-SALE - Sales Executive		XXX-XX-XXXX	YHG000137	02/01/2000	Active	<Using Time & Attendance>			
Home Department : 008000 - Sales									
Current Pay Period		3/14/2022	3/27/2022	Find	Show Pay Class	Dashboard			
Timecard									
Totals									
Schedule									
Time Off Balances									
<	Approve	Week 1	In - Out		Pay Code	Hours	Department	Daily Totals	
<	<input type="checkbox"/>	Mon 03/14	07:00 AM	- 10:00 PM		15.00	008000	15.00	
<	<input type="checkbox"/>	Tue 03/15	07:00 AM	- 06:00 PM		11.00	008000	11.00	
<	<input type="checkbox"/>	Wed 03/16	09:00 AM	- 05:00 PM		8.00	008000	8.00	
<	<input type="checkbox"/>	Thu 03/17	09:00 AM	- 05:00 PM		8.00	008000	8.00	
<	<input type="checkbox"/>	Fri 03/18	09:00 AM	- 05:00 PM		8.00	008000	8.00	
<	<input type="checkbox"/>	Sat 03/19	-	-		0.00	008000	0.00	
<	<input type="checkbox"/>	Sun 03/20	-	-		0.00	008000	0.00	

2

Complete the information:

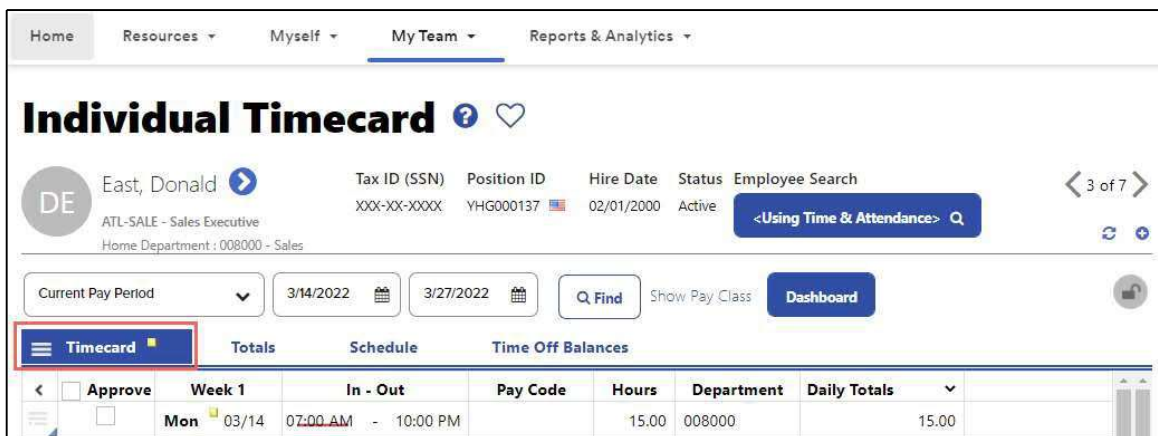
- In the comments field, enter a note.
- **Apply Note To** field auto fills to Timecard.
- Select to **Allow employees to view the note** (if applicable).
- Select the **Reason** (if applicable).



3

Click **Save**.

**Result:** The yellow note indicator is now visible on the timecard. You can point to it to display the contents of the note.



## Correcting Department Transfers

When an employee works in multiple departments, you must update the employee's timecard to reflect the appropriate amount of time assigned to each department.

You may encounter various situations in which you need to delete a punch.

**Scenario:** The employee worked in their regular department until 12:00pm. From 12:00pm until the end of the day, the employee worked in another department. Their hours need to be allocated to the appropriate department.

Access the individual timecard. **My Team > Time & Attendance > Individual Timecard**

Step	Action						
1	Locate the employee's timecard.						
2	<p>In the row for the day on which the employee worked in another department, enter the employee's hours.</p> <table border="1"> <thead> <tr> <th>If the Transfer is a</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Full workday</td> <td>For a time-based employee, enter the time in and out for the day. For an hours-based employee, in the <b>Hours</b> field for the workday, enter the total hours.</td> </tr> <tr> <td>Partial workday</td> <td> <p>For a time-based employee:</p> <ol style="list-style-type: none"> <li>1. Right-click in the Out-field for the workday.</li> <li>2. Select <b>Transfer</b>.</li> <li>3. In the relevant rows, enter the in and out times.</li> </ol> <p>For an hours-based employee:</p> <ol style="list-style-type: none"> <li>1. To add another row, click the row menu icon and select <b>Add Blank Row</b> or <b>Copy Row</b>.</li> <li>2. In the relevant rows, enter the hours worked for each department.</li> </ol> </td> </tr> </tbody> </table>	If the Transfer is a	Then	Full workday	For a time-based employee, enter the time in and out for the day. For an hours-based employee, in the <b>Hours</b> field for the workday, enter the total hours.	Partial workday	<p>For a time-based employee:</p> <ol style="list-style-type: none"> <li>1. Right-click in the Out-field for the workday.</li> <li>2. Select <b>Transfer</b>.</li> <li>3. In the relevant rows, enter the in and out times.</li> </ol> <p>For an hours-based employee:</p> <ol style="list-style-type: none"> <li>1. To add another row, click the row menu icon and select <b>Add Blank Row</b> or <b>Copy Row</b>.</li> <li>2. In the relevant rows, enter the hours worked for each department.</li> </ol>
If the Transfer is a	Then						
Full workday	For a time-based employee, enter the time in and out for the day. For an hours-based employee, in the <b>Hours</b> field for the workday, enter the total hours.						
Partial workday	<p>For a time-based employee:</p> <ol style="list-style-type: none"> <li>1. Right-click in the Out-field for the workday.</li> <li>2. Select <b>Transfer</b>.</li> <li>3. In the relevant rows, enter the in and out times.</li> </ol> <p>For an hours-based employee:</p> <ol style="list-style-type: none"> <li>1. To add another row, click the row menu icon and select <b>Add Blank Row</b> or <b>Copy Row</b>.</li> <li>2. In the relevant rows, enter the hours worked for each department.</li> </ol>						
3	<p>In the row with the hours worked in another department, click in the <b>Department</b> field and then click <b>Search</b>.</p> <p><b>Result:</b> A list of departments displays.</p>						
4	Select the other department in which the employee worked.						
5	Click <b>Save</b> .						

## Editing Timecards Summary

You have learned how to edit timecards and fix various types of exceptions including:

- Missed punches
- Deleted punches
- Added notes
- Corrected department transfers

In our scenarios, we happened to work with time-based employees who clock in and out, but you might have some hours-based employees who record just the total hours worked each day. The procedures are the same.

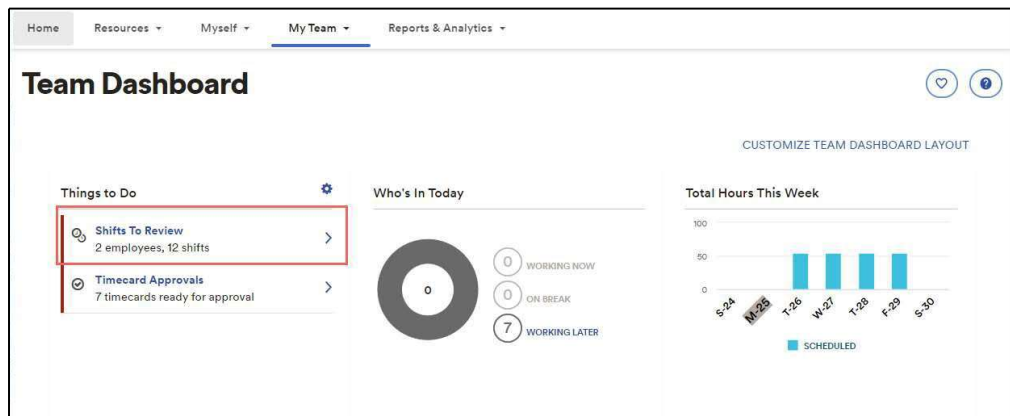


## Completing Other Timecard Tasks

In addition to editing your employees' timecards, there are other timecards tasks you may need to complete, such as reviewing shifts and approving timecards.

Is it important to you to know when your employees work later than expected? Or come to work earlier than expected? Or work longer than expected? If so, the Team Dashboard provides you with a feature to flag your employees' shifts when they meet certain criteria.

Access the Team Dashboard: **My Team > Time & Attendance > Team Dashboard**. In the **Things to Do** tile, click **Shifts to Review**.



## Setting Your Display Preferences

Set your display preferences to specify the criteria you want to use for any shifts that might need to be reviewed. Follow the steps below to set your preferences.

Step	Action
1	<p>From the <b>Review Shifts</b> page, next to the <b>Rule</b> field, click the <b>Configurations</b> icon.</p>

2

Set your criteria and then click **Save**.

[Back](#)

### Display Preferences

Manage the display of things that deserve your attention

OFF **Include My Indirect Reports**

---

**Missed Punches**

Show Missed Out Punch  hours after In Punch (when no scheduled shift exists)

Show Missed Punch  minutes after scheduled time

---

ON **Display Shifts to Review**  
A break longer than two hours in an employee's day will be considered a separate shift.

---

ON **Worked Longer Than Expected**  
Show Shift when employee has worked more than a  hour shift (with or without scheduled shift)

---

ON **Worked Earlier Than Expected**  
Show Shift when employee has clocked in before  (when no scheduled shift exists)

---

ON **Worked Later Than Expected**  
Show Shift when employee has clocked out after  (when no scheduled shift exists)

---

ON **Worked Longer Than Expected Outside of Shift**  
Show shift when employee is working  minutes

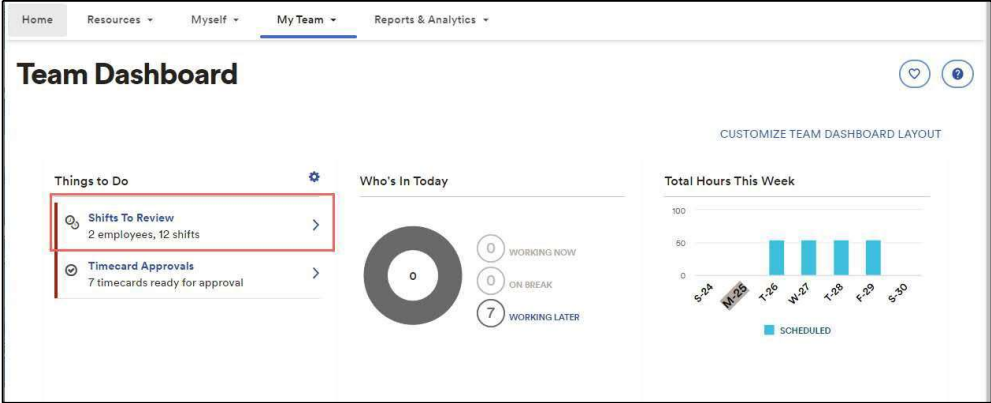
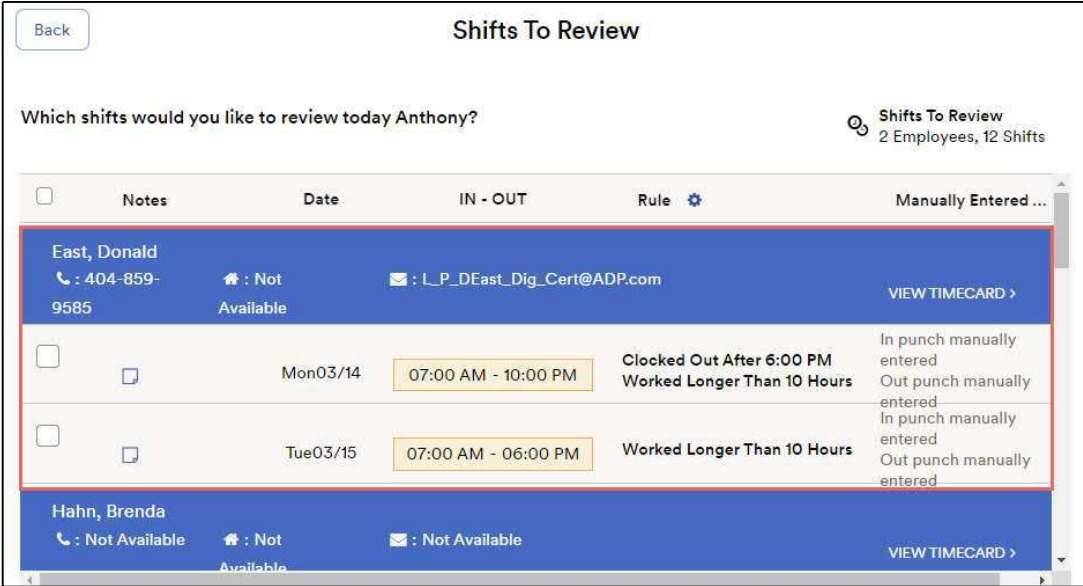
---

## Reviewing Shifts

The Team Dashboard provides you with a feature to flag your employees' shifts when they meet certain criteria. When an employee clocks in earlier or later than expected, or works longer than expected, you need to review those shifts. For example, you might want to be notified if an employee's shift is longer than 10 hours. You specify the types of things that you want flagged for your attention by setting your display preferences.

**Scenario:** Most of your employees clock out around 5:00 p.m. so you have chosen to flag shifts in which employees clock out later than 6:00 p.m. You have also chosen to flag shifts in which employees work 30 minutes outside of their shifts. See if there are any shifts you need to review.

Access the Team Dashboard: **My Team > Time & Attendance > Team Dashboard**

Step	Action															
1	<p>On the <b>Things to Do</b> tile, click <b>Shifts to Review</b>.</p>  <p>The screenshot shows the 'Team Dashboard' interface. In the 'Things to Do' section, there are two items: 'Shifts To Review' (2 employees, 12 shifts) and 'Timecard Approvals' (7 timecards ready for approval). The 'Shifts To Review' item is highlighted with a red box.</p>															
2	<p>Review the shifts and add notes to the timecard entries, if desired.</p>  <p>The screenshot shows the 'Shifts To Review' page. It asks 'Which shifts would you like to review today Anthony?' and shows a list of shifts for two employees: East, Donald and Hahn, Brenda. The shifts are highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Notes</th> <th>Date</th> <th>IN - OUT</th> <th>Rule</th> <th>Manually Entered ...</th> </tr> </thead> <tbody> <tr> <td>East, Donald ☎ : 404-859-9585 🏠 : Not Available ✉ : L_P_DEast_Dig_Cert@ADP.com</td> <td>Mon03/14</td> <td>07:00 AM - 10:00 PM</td> <td>Clocked Out After 6:00 PM Worked Longer Than 10 Hours</td> <td>In punch manually entered Out punch manually entered</td> </tr> <tr> <td>Hahn, Brenda ☎ : Not Available 🏠 : Not Available ✉ : Not Available</td> <td>Tue03/15</td> <td>07:00 AM - 06:00 PM</td> <td>Worked Longer Than 10 Hours</td> <td>In punch manually entered Out punch manually entered</td> </tr> </tbody> </table>	Notes	Date	IN - OUT	Rule	Manually Entered ...	East, Donald ☎ : 404-859-9585 🏠 : Not Available ✉ : L_P_DEast_Dig_Cert@ADP.com	Mon03/14	07:00 AM - 10:00 PM	Clocked Out After 6:00 PM Worked Longer Than 10 Hours	In punch manually entered Out punch manually entered	Hahn, Brenda ☎ : Not Available 🏠 : Not Available ✉ : Not Available	Tue03/15	07:00 AM - 06:00 PM	Worked Longer Than 10 Hours	In punch manually entered Out punch manually entered
Notes	Date	IN - OUT	Rule	Manually Entered ...												
East, Donald ☎ : 404-859-9585 🏠 : Not Available ✉ : L_P_DEast_Dig_Cert@ADP.com	Mon03/14	07:00 AM - 10:00 PM	Clocked Out After 6:00 PM Worked Longer Than 10 Hours	In punch manually entered Out punch manually entered												
Hahn, Brenda ☎ : Not Available 🏠 : Not Available ✉ : Not Available	Tue03/15	07:00 AM - 06:00 PM	Worked Longer Than 10 Hours	In punch manually entered Out punch manually entered												

3 To the left of the **Notes** field, select the checkbox when done with your review. Click the checkbox at the top to select all.

**Result:** All the shifts are selected.

The screenshot shows a 'Shifts To Review' window. At the top left is a 'Back' button. The title is 'Shifts To Review'. Below the title is the question 'Which shifts would you like to review today Anthony?' and a search icon. To the right, it says 'Shifts To Review 2 Employees, 12 Shifts'. Below this is a table with columns: Notes, Date, IN - OUT, Rule, and Manually Entered. The first row is for 'East, Donald' with contact info and a 'VIEW TIMECARD >' link. The next two rows are for shifts on 'Mon03/14' and 'Tue03/15', both with checkboxes in the 'Notes' column and 'Manually Entered' status. The last row is for 'Hahn, Brenda' with contact info and a 'VIEW TIMECARD >' link. At the bottom center is a 'DISMISS' button.

Notes	Date	IN - OUT	Rule	Manually Entered ...
<b>East, Donald</b> ☎ : 404-859-9585    🏠 : Not Available    ✉ : L_P_DEast_Dig_Cert@ADP.com <a href="#">VIEW TIMECARD &gt;</a>				
<input checked="" type="checkbox"/>	Mon03/14	07:00 AM - 10:00 PM	Clocked Out After 6:00 PM Worked Longer Than 10 Hours	In punch manually entered Out punch manually entered
<input checked="" type="checkbox"/>	Tue03/15	07:00 AM - 06:00 PM	Worked Longer Than 10 Hours	In punch manually entered Out punch manually entered
<b>Hahn, Brenda</b> ☎ : Not Available    🏠 : Not Available    ✉ : Not Available <a href="#">VIEW TIMECARD &gt;</a>				

4 Click **Dismiss**.

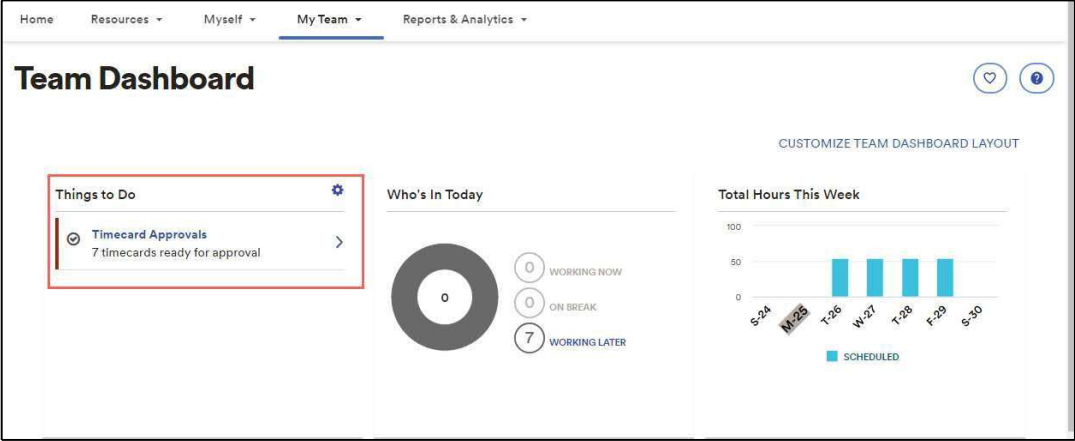
**Result:** The shifts are no longer flagged for review.

## Approving Timecards

Let's revisit the Time & Attendance workflow process. As you know, throughout the pay period, your employees track their time, and you edit their timecards as needed. At the end of the pay period, your practitioner will close the pay period and prepare for payroll processing. Before that can happen, though, you are responsible for resolving any remaining exceptions and approving your employees' timecards.

**Scenario:** It's the end of the pay period, and you need to review and approve timecards. All errors and warnings have been cleared.

Access the Team Dashboard: **My Team > Time & Attendance > Team Dashboard**

Step	Action								
1	<p>On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</p> 								
2	<p>In the row for the day on which the employee worked in another department, enter the employee's hours.</p> <table border="1"> <thead> <tr> <th>If the Transfer is A</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>No timecard exceptions</td> <td>Proceed to step 3.</td> </tr> <tr> <td>Missed punches</td> <td> <ol style="list-style-type: none"> <li>1. Click <b>Missed Punches</b>.</li> <li>2. Enter the missing punches.</li> <li>3. Click <b>Dashboard</b>.</li> <li>4. On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</li> </ol> </td> </tr> <tr> <td>Timecard exceptions</td> <td> <ol style="list-style-type: none"> <li>1. Click <b>Other Exceptions</b>.</li> </ol> <p><b>Result:</b> The Timecard Exceptions page displays.</p> <ol style="list-style-type: none"> <li>2. Resolve the exceptions.</li> <li>3. Click <b>Dashboard</b>.</li> <li>4. On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</li> </ol> </td> </tr> </tbody> </table>	If the Transfer is A	Then	No timecard exceptions	Proceed to step 3.	Missed punches	<ol style="list-style-type: none"> <li>1. Click <b>Missed Punches</b>.</li> <li>2. Enter the missing punches.</li> <li>3. Click <b>Dashboard</b>.</li> <li>4. On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</li> </ol>	Timecard exceptions	<ol style="list-style-type: none"> <li>1. Click <b>Other Exceptions</b>.</li> </ol> <p><b>Result:</b> The Timecard Exceptions page displays.</p> <ol style="list-style-type: none"> <li>2. Resolve the exceptions.</li> <li>3. Click <b>Dashboard</b>.</li> <li>4. On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</li> </ol>
If the Transfer is A	Then								
No timecard exceptions	Proceed to step 3.								
Missed punches	<ol style="list-style-type: none"> <li>1. Click <b>Missed Punches</b>.</li> <li>2. Enter the missing punches.</li> <li>3. Click <b>Dashboard</b>.</li> <li>4. On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</li> </ol>								
Timecard exceptions	<ol style="list-style-type: none"> <li>1. Click <b>Other Exceptions</b>.</li> </ol> <p><b>Result:</b> The Timecard Exceptions page displays.</p> <ol style="list-style-type: none"> <li>2. Resolve the exceptions.</li> <li>3. Click <b>Dashboard</b>.</li> <li>4. On the <b>Things to Do</b> tile, click <b>Timecard Approvals</b>.</li> </ol>								

3 To the left of the **Notes** field, select the checkbox.

**Result:** All the timecards are selected.

The screenshot shows the 'Timecard Approvals' interface. At the top, there is a 'Back' button and the title 'Timecard Approvals'. Below the title, it asks 'Which timecards would you like to resolve today Anthony?' and shows 'Timecard Approvals' with a checkmark and '7 timecards ready for approval'. A table lists timecards with columns for 'Note', 'Name', and 'Totals'. A blue bar indicates the week 'BIWKLY : 3/14/2022 - 3/27/2022'. The table contains seven rows, each with a checked checkbox, a name, and a total value. A red box highlights the checkboxes in the first column. At the bottom, there is an 'APPROVE' button.

Note	Name	Totals
BIWKLY : 3/14/2022 - 3/27/2022		
<input checked="" type="checkbox"/>	Cavallo, Frank	70.00
<input checked="" type="checkbox"/>	Duncan, Heather	70.00
<input checked="" type="checkbox"/>	East, Donald	90.00
<input checked="" type="checkbox"/>	Evers, Thomas	70.00
<input checked="" type="checkbox"/>	Fager, Charles	74.50
<input checked="" type="checkbox"/>	Hahn, Brenda	70.00
<input checked="" type="checkbox"/>	Johnson, Kenneth	70.00

4 Click **Approve**.

**Result:** The timecards are approved.

The screenshot shows the 'Timecard Approvals' interface after approval. It features a 'Back' button and the title 'Timecard Approvals'. A green message box displays 'Congrats Anthony! Great Job Anthony! You are all done.'

## Reports

This topic provides information on the standard reports provided by ADP, how they are organized, and how you can edit them to meet your needs. Reports make it easy for you to view, save, print, and download various sets of formatted data.

### Reasons to Run a Report

Below are reasons why you would run a report of your Time & Attendance data.

- Review timecard errors.
- Check schedule exceptions.
- Check employee accrual balances.
- View daily schedules.
- Check department allocations.
- Check employee overtime.

### Accessing Reports

To view and run reports from the Team Dashboard select: **Reports & Analytics > My Team Reports > Time & Attendance.**



### Tabs and Descriptions


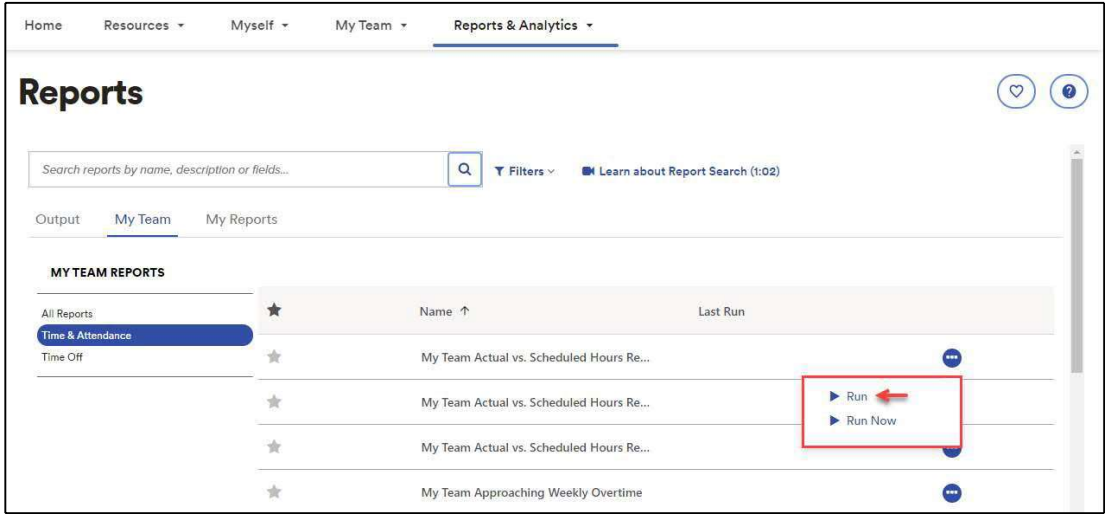
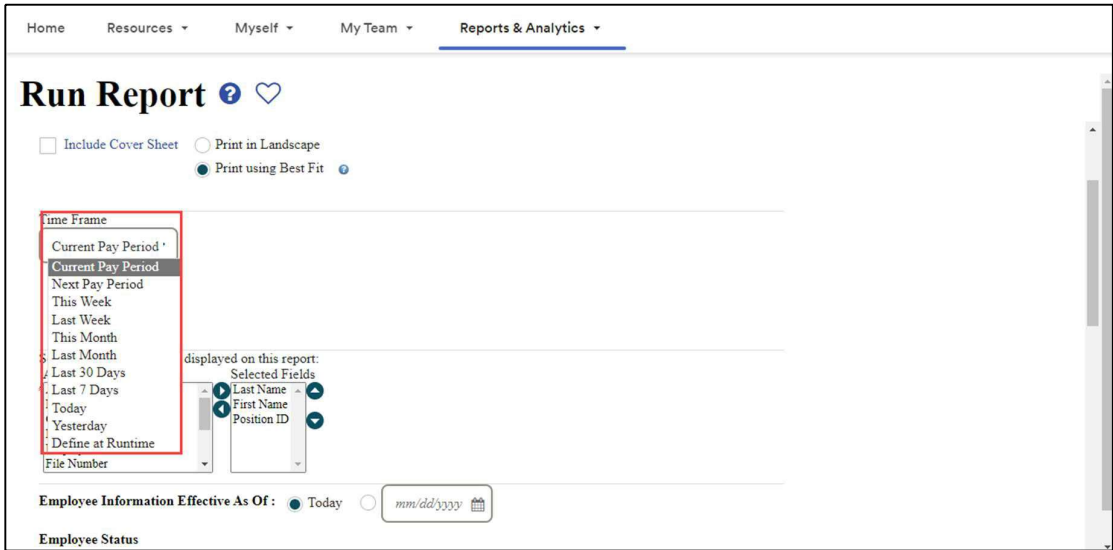
Tab	Description
Output	Contains the reports you can run.
My Team	View the standard reports available to run for your team.
My Reports	Contains the reports that you can run and save.

## Generating and Viewing Reports

Reports always reflect current data at the time the report is run. By running the report, you can save a record or snapshot of the report data at a specific point in time.

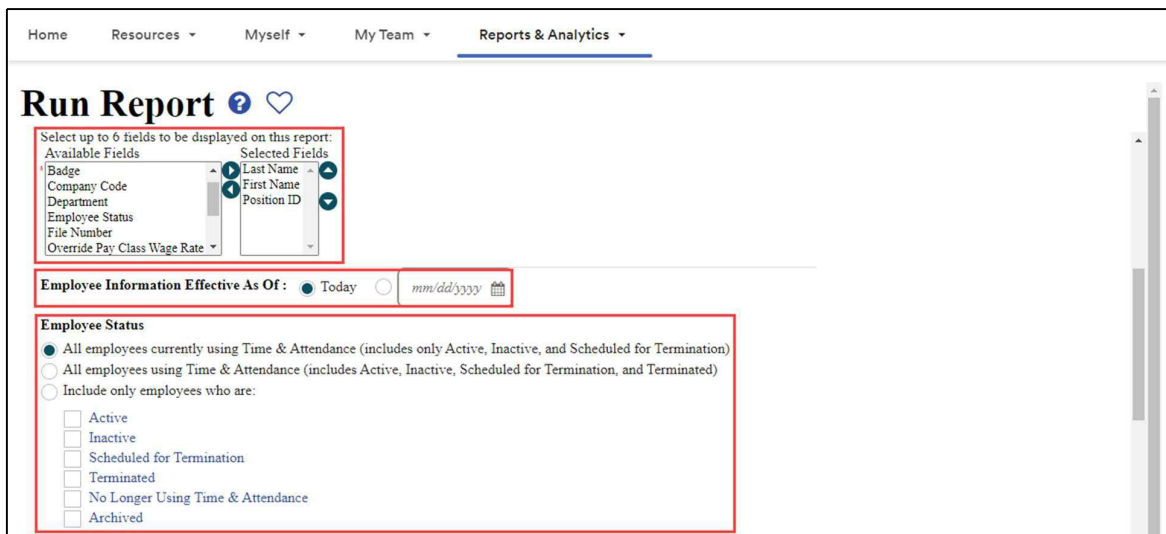
### Choosing Report Criteria

Access: **Reports & Analytics > My Team Reports > Time & Attendance** and then follow the steps below.

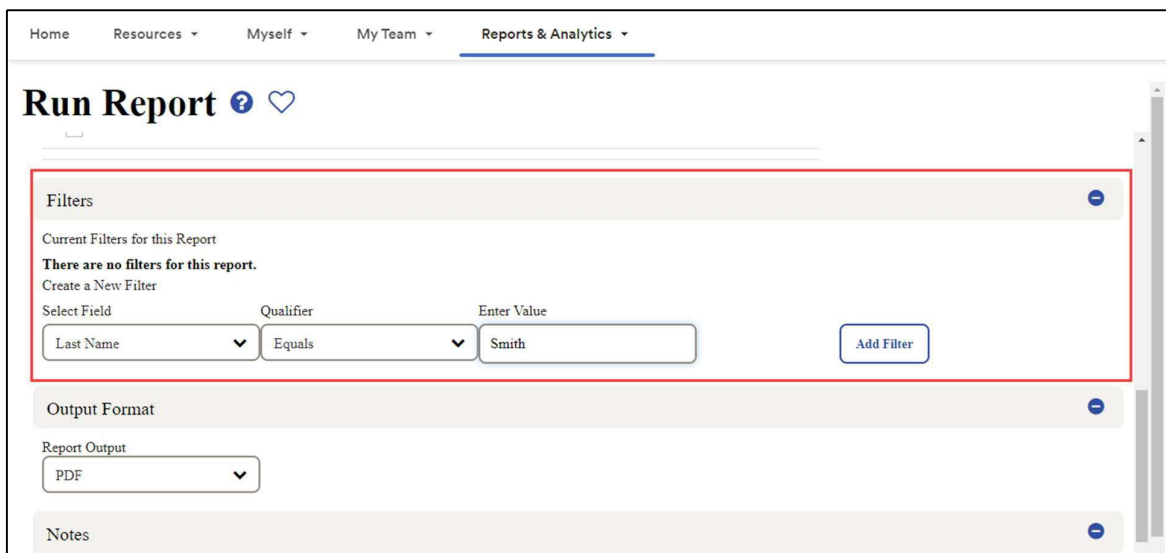
Step	Action
1	<p>Click  (action) next to the report you want to run and select <b>Run</b>.</p> 
2	<p>In the <b>Time Frame</b> field, select the time frame.</p> 



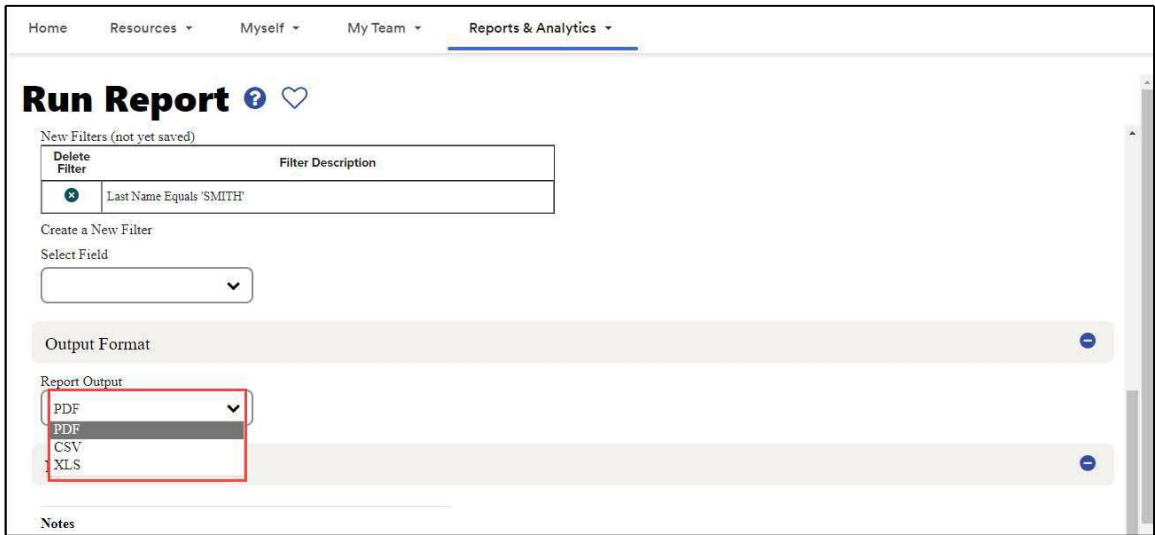
- 3 Select the fields you want displayed on the report using the arrows.  
**Note:** The **Employee Information Effective As Of** field always defaults to **Today**. Click the calendar icon to select another date. **Employee Status** defaults to **All employees currently using Time & Attendance**.



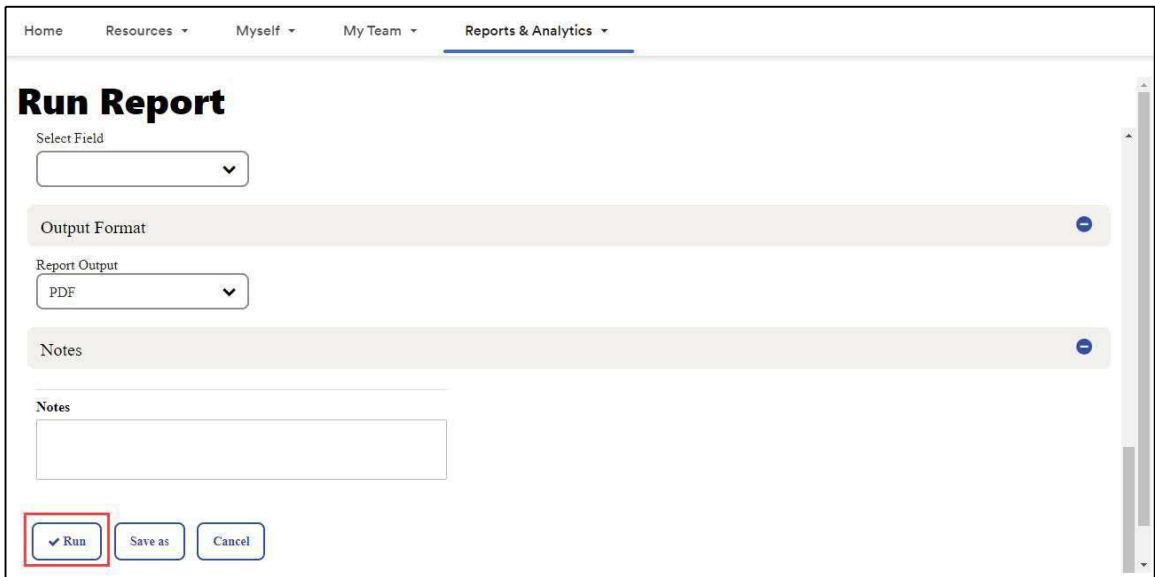
- 4 To filter data by a field, under **Filters**, select options for **Select Field**, **Qualifier**, and **Enter Value** for the report. Then click **Add Filter**.



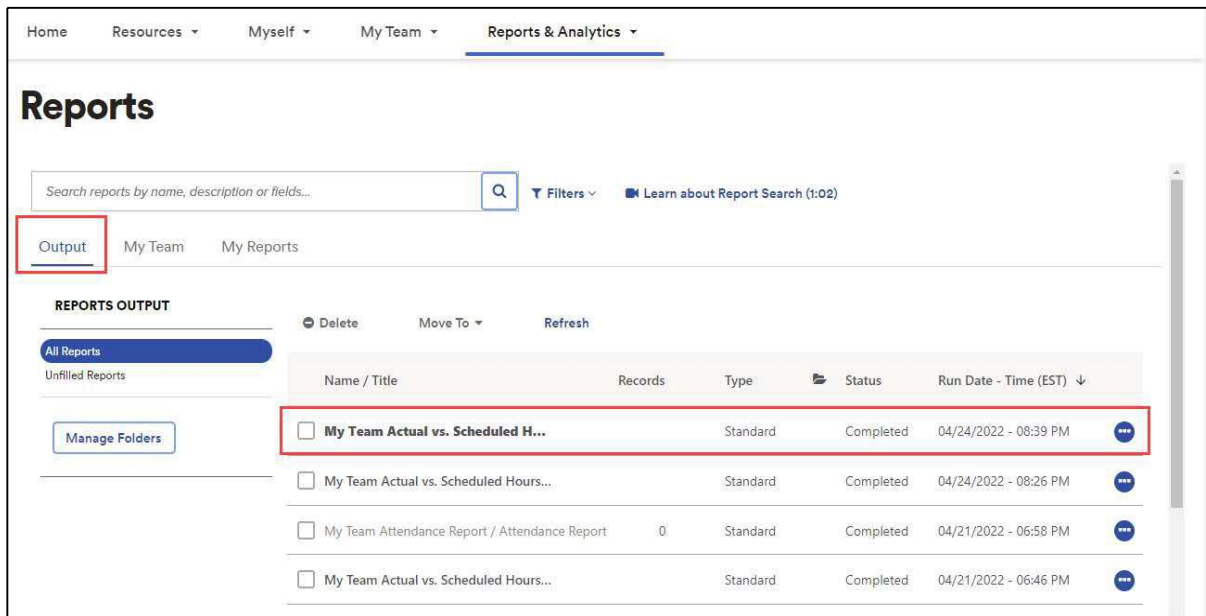
5 In the **Output Format** section, select the **Report Output**.



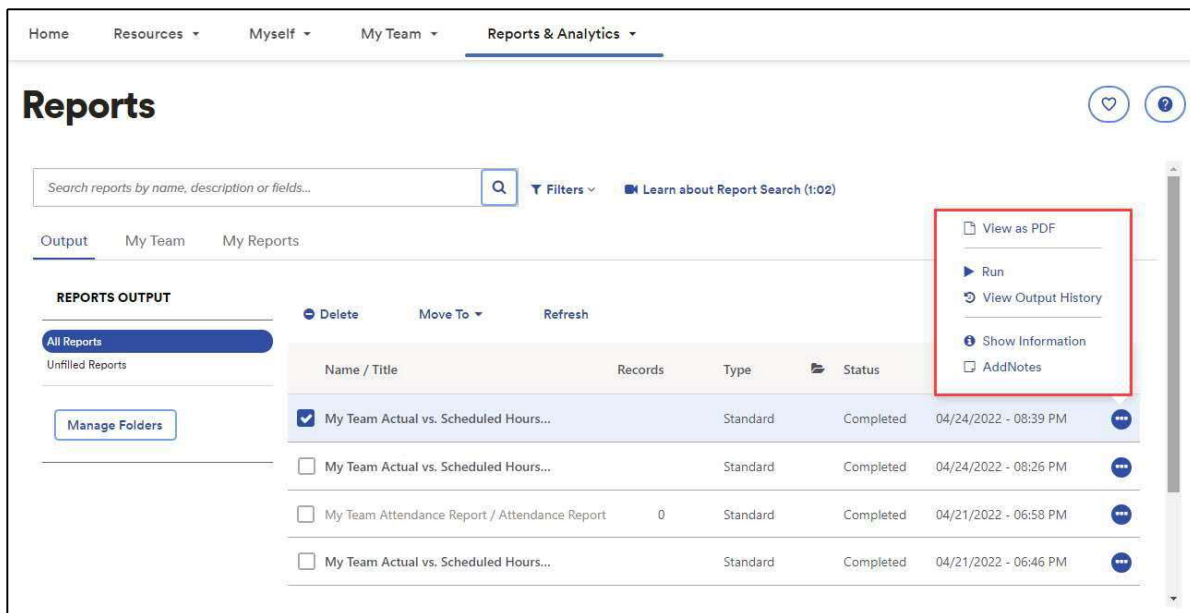
6 Click **Run** to generate the report.



7 The report will appear in the **Reports & Analytics Output** folder.

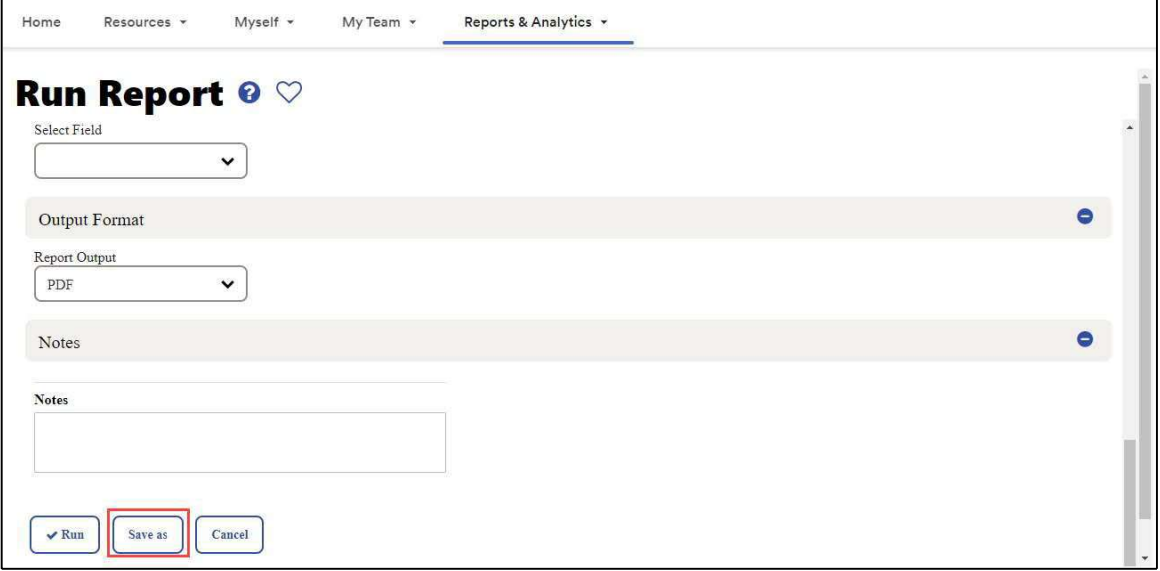
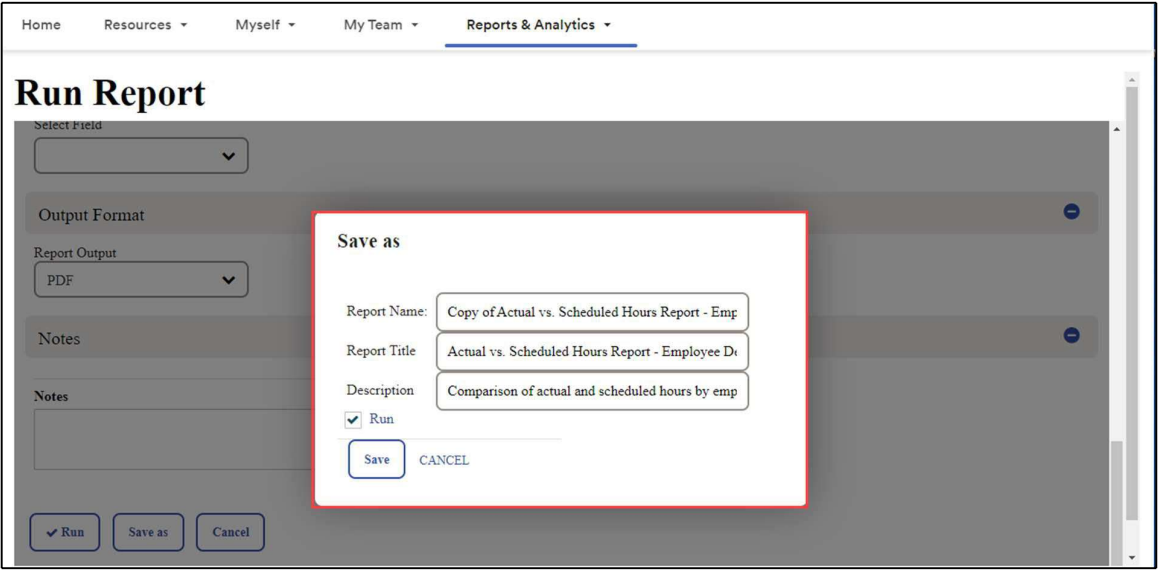


8 On the **Output** tab, select the report and click the (action) button. Select the **View As** format you chose when you created the report. The report will open in a new window.



## Saving a Report

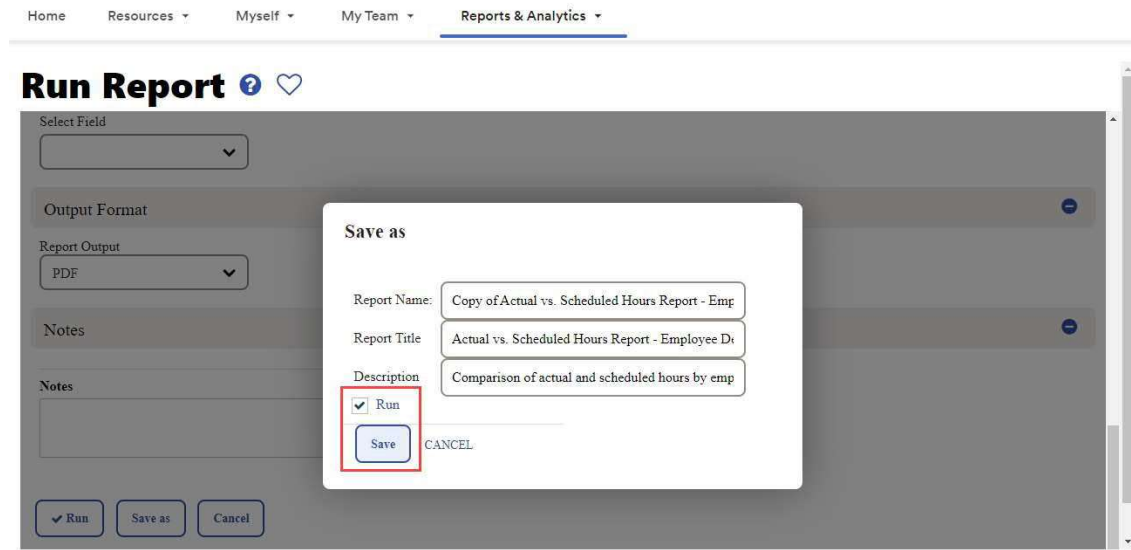
Follow the steps below to save your report.

Step	Action
1	<p>After completing the fields, click <b>Save As</b> instead of <b>Run</b>.</p> <p><b>Note:</b> Clicking <b>Run</b> generates the report on the <b>Output</b> tab. Clicking <b>Save As</b> saves the report to the <b>My Report</b> tab.</p>  <p>The screenshot shows the 'Run Report' page with a navigation bar at the top containing 'Home', 'Resources', 'Myself', 'My Team', and 'Reports &amp; Analytics'. The main content area has a title 'Run Report' with a help icon and a heart icon. Below the title are several form fields: 'Select Field' (a dropdown menu), 'Output Format' (a horizontal bar with a minus icon), 'Report Output' (a dropdown menu set to 'PDF'), and 'Notes' (a horizontal bar with a minus icon). At the bottom of the form are three buttons: 'Run' (with a checkmark), 'Save as' (highlighted with a red box), and 'Cancel'.</p>
2	<p>Enter the <b>Report Name</b>, <b>Title</b>, and <b>Description</b>.</p> <p><b>Note:</b> The title you enter displays at the top of your report.</p>  <p>The screenshot shows the 'Run Report' page with a 'Save as' dialog box open in the center. The dialog box has a title 'Save as' and three input fields: 'Report Name' (containing 'Copy of Actual vs. Scheduled Hours Report - Emp'), 'Report Title' (containing 'Actual vs. Scheduled Hours Report - Employee D'), and 'Description' (containing 'Comparison of actual and scheduled hours by emp'). Below these fields is a checked checkbox for 'Run' and two buttons: 'Save' and 'CANCEL'. The background of the page is dimmed.</p>

3

Select **Run** and then click **Save**.

**Result:** The Output page displays.



**Note:**

- **My Reports** are private. If you save a **My Report**, it will be available only to you to run in the future.
- If you want to update the report criteria on a report that you have saved, access the **My Reports** tab and click the report name.