# George Washington University

# Workforce Timekeeper™ 6.0

# Advanced Training

# Table of Contents

## Notes

# Topic 1: Creating HyperFind Queries

## HyperFind queries

Workforce Timekeeper uses HyperFind queries to search People records and return employees that meet a specific set of criteria. Workforce Genies, calendars, and reports use HyperFind queries are used in Workforce Genies, calendars, and reports.

The following are examples of frequently used queries:

- All employees who forgot to punch
- All employees with overtime
- All clerks in my department who were absent
- All employees who are on vacation today

**Note**

The employee group, assigned to you, controls which employees a Hyperfind query will return to you.

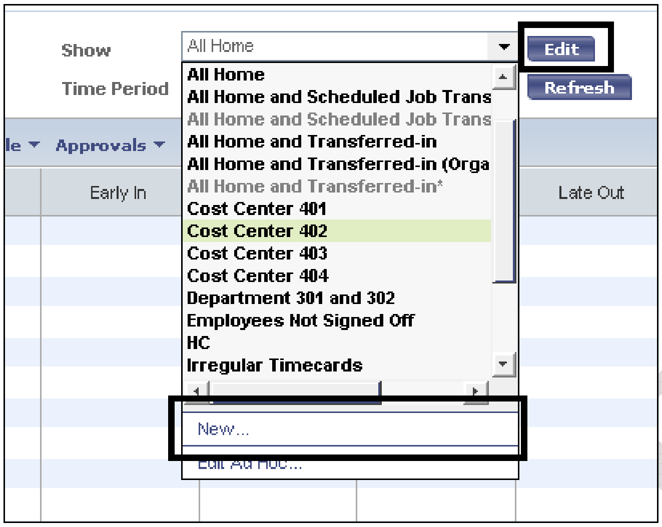
### HyperFind query types

The following table describes the three types of HyperFind queries:

| Query type | Description |
| --- | --- |
| Public | Queries that are available to all users who can access Workforce Genies or reports |
| Personal | Queries that are accessible only to the user who created them |
| Ad hoc | Queries that are created for temporary use during the current session |

# Creating a new HyperFind query

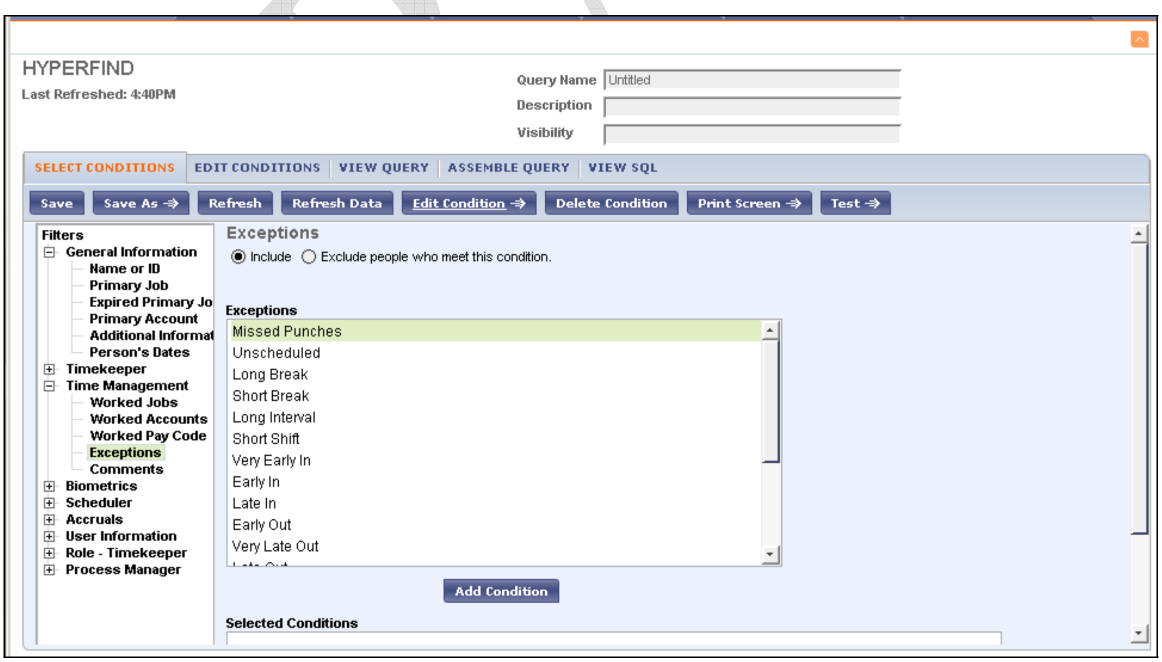
The Show drop down list contains all the available HyperFind queries. You can edit them or create a new one. The New and Edit options open the HyperFind query editor.




# The HyperFind query editor

The HyperFind Query editor is where you create and edit personal and ad hoc queries.

The following illustration shows the HyperFind Query editor:



The following table describes the five possible tabs in the HyperFind Query editor:

| Tab | Description |
|---|---|
| Select Conditions | Contains options for creating a query |
| Edit Conditions | Is where you add, change, and delete conditions in a query |
| View Query | Displays all conditions and their relationships |
| Assemble Query | Contains options for modifying the association between conditions |
| View SQL | Displays SQL server code for the query |

### Filters

Use HyperFind filters to define the conditions that search for and return the employees you need.. The following lists the nine categories of filters in the HyperFind Query editor:

- General Information
- Timekeeper
- Time Management
- Biometrics
- Scheduler
- Accruals
- User Information
- Role - Timekeeper
- Process Manager

> **Note**
> Your assigned Function Access Profile determines which filter categories you have access to in the HyperFind Query editor.

## Steps

### Configuringe a new query

| Step | Action |
|---|---|
| 1 | From the Show drop down list, select **New**. |
| 2 | From a filter category, select a filter. |
| 3 | Click one or more conditions and specify any necessary information. |
| 4 | Click **Include** or **Exclude** to include or exclude employees who match the selected condition. |
| 5 | Click **Add Condition**. |
| 6 | Repeat steps 2--5 to add additional conditions. |

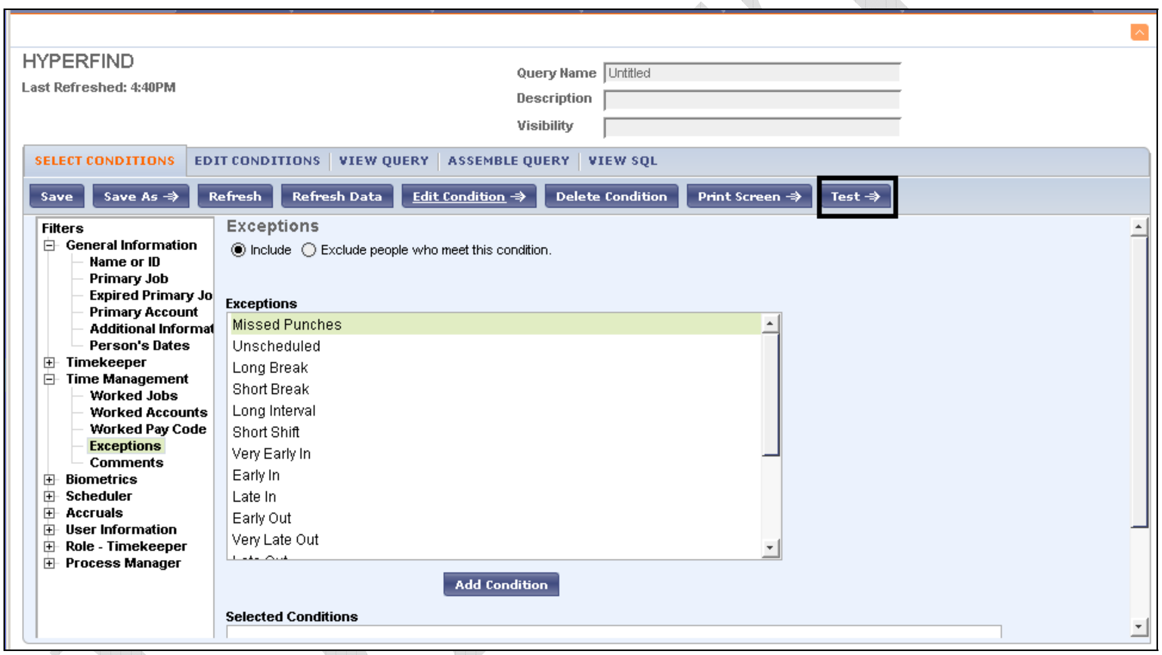
**Note**

Workforce Timekeeper automatically inserts logic operators, OR, AND, or BUT, between conditions to create one query.

# Testing HyperFind queries

Test your query to confirm that it returns the correct employees. You can click the Test button to test your query. Workforce Timekeeper returns results for the current pay period. You can select a different time period.

The following illustration highlights the Test button:




# Steps

## Testing a query

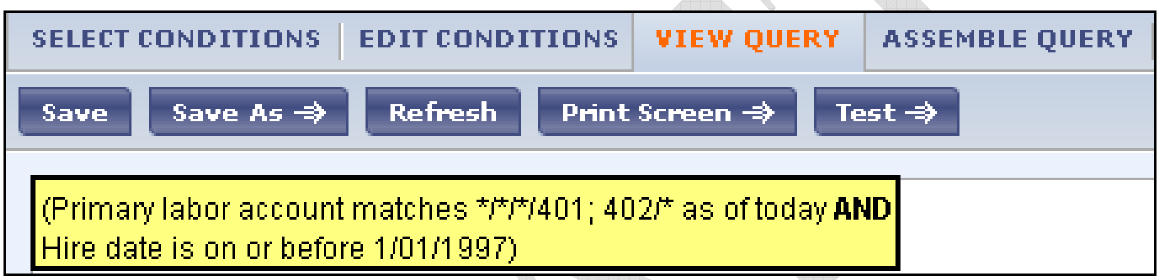
| Step | Action |
|---|---|
| 1 | From any tab in the HyperFind Query editor, click **Test**. |
| 2 | From the **Time Period** list, select or define a time span. |
| 3 | Review the results. |
| 4 | Click **Print** to print the employee list. |

# Viewing the query logic

If your query does not produce the correct results, you need to analyze the query logic between conditions. Workforce Timekeeper combines multiple conditions using the following "natural language query building blocks" or logic operators:

| Operator | Description |
|---|---|
| AND | Displays employees whose data matches both conditions. |
| OR | Displays employees whose data matches either of the conditions. |
| NOT | Displays employees whose data does not match the specified condition. |

The View Query tab displays all of the conditions in the query and the logic operators that combine them. The following illustration shows a sample query in the View Query tab:




## Steps

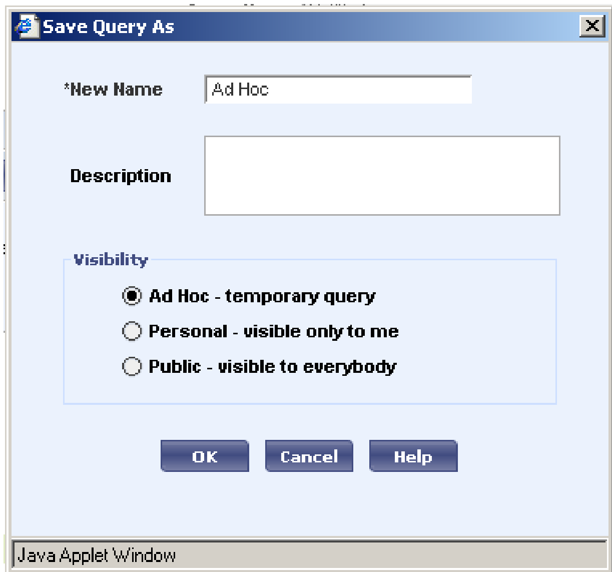
### Viewing a query

| Step | Action |
|---|---|
| 1 | From the HyperFind Query workspace, click the **View Query** tab. |

# Saving queries

After the query returns the desired results, save the query and assign to it a visibility status.

The following illustration shows a sample Save Query As dialog box for an ad hoc query:




# Steps

## Saving HyperFind queries

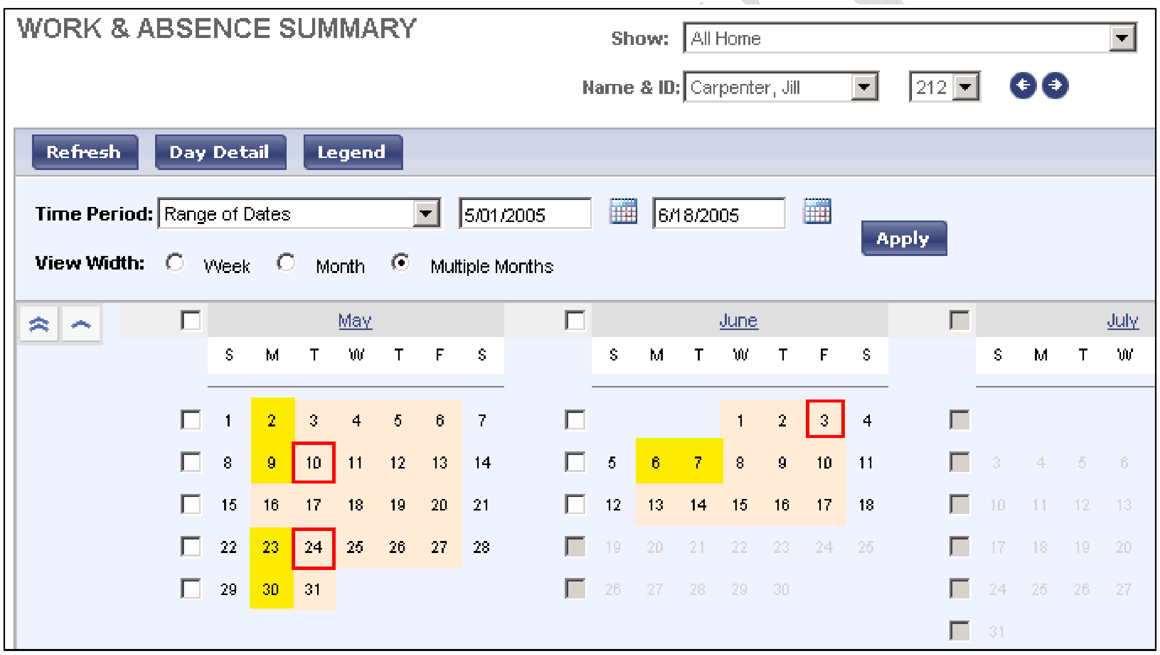
| Step | Action |
|---|---|
| 1 | Click **Save** or **Save As**. |
| 2 | Enter a query name and a description. |
| 3 | Select a visibility option. |
| 4 | Click **OK**. |

# Topic 2: Using the Work & Absence Summary calendar

## Work & Absence Summary calendar

The Work & Absence Summary calendar displays absence and time trends for an employee over a selected time period. The calendar uses color codes, icons, and text to highlight critical information about an employee's worked and non-worked times. These indicators make it easier for you to quickly spot deviations in an employee's time and attendance.

The following illustration shows a sample Work & Absence Summary calendar displaying the multiple month view. The shaded boxes indicate sick days and the outlined boxes indicate late-in punches.




### Viewing trends in the Work & Absence Summary calendar

You can use the Work & Absence Summary calendar to identify trends in worked and time-off events for employees. The calendar-like display makes it easy for you to view a day column to see whether an employee has a pattern of taking time off on or arriving late on a specific day. You can see trend information such as the following:

- Number of Mondays the employee has arrived late to work
- Number of Fridays the employee has called in sick
- Number of weekends the employee is scheduled and has worked

### Navigating in the calendar

The following table provides the steps to display information in a calendar for data analysis:

| Action | Step |
|---|---|
| Select a particular date | Click the **date** cell in the calendar. Its fill color changes to show that the date is selected. |
| Deselect a selected date | Click the **date** cell a second time. Its fill color reverts to normal to show that the date is no longer selected. |
| View non-abbreviated details of a particular day | Click the **date cell** and select **Day Detail** from the menu options. |
| View a legend showing descriptions of abbreviations and colors | Select **Legend** from the menu options. |
| To view different calendar formats | Select **Week** to view one week across the screen. This view displays the most detail.<br>Select **Month** to view each month across the screen. This view displays trends.<br>Select **Multiple Month** to view several months across the screen. This view displays several months at a time. |

## Steps

### Accessing and viewing information in the Work & Absence Summary calendar

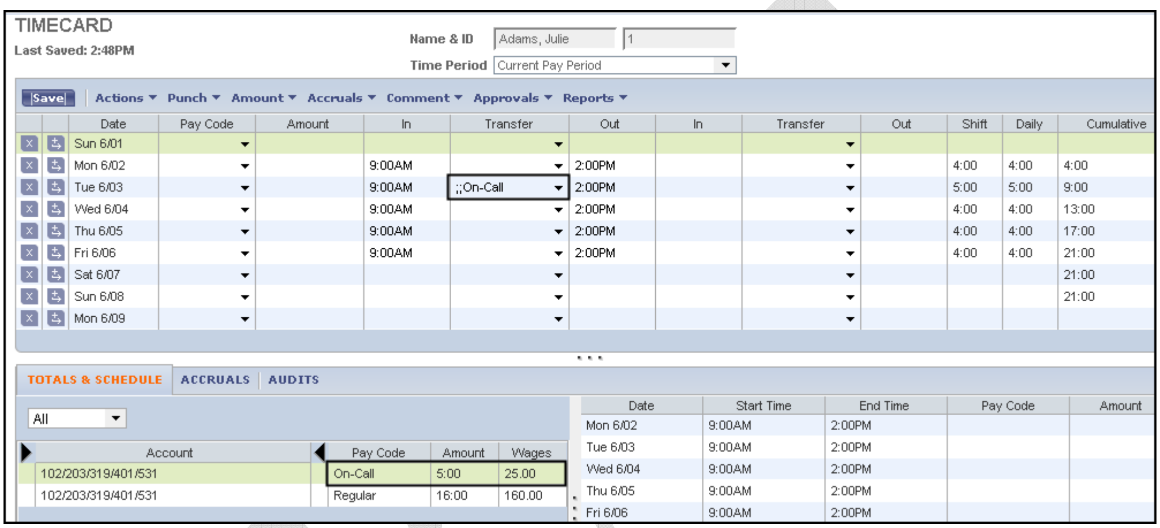
| Step | Action |
|---|---|
| 1 | Access **Work & Absence Summary** from the **Timekeeping** tab. |
| 2 | From the **Show** list, select a group of employees. From the **Name & ID** list, select an employee. |
| 3 | From the **Time Period** list, select or define a time span. Click one of the **View Width** options and then click **Apply**. |
| 4 | Review information in the calendar workspace. |

# Topic 3: Transferring Employee Time

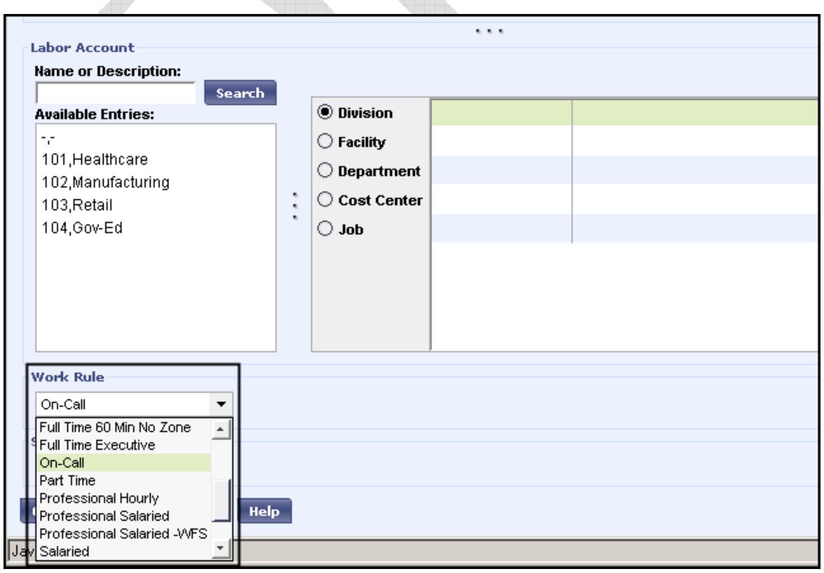
## Work rule transfers

Each employee is assigned a default work rule. Work rules identify such things as how punches are rounded, the types of overtime an employee can earn and which pay codes track which types of hours. During a normal workday, all worked are calculated using the assigned work rule. In some cases, you may need to have Workforce Timekeeper calculate the employee's shift using a different work rule. You note this in the system using a work rule transfer.

The following illustration shows an hourly timecard with an On-Call work transfer on Tuesday:




The following illustrations shows the Select Transfer dialog box where you identify the work rule to which you are transferring the shift:



# Steps

## Transferring work rule hours

| Step | Action |
|---|---|
| 1 | Do you want to transfer all or a portion of the shift hours? |
| | To transfer all hours in a shift, continue to step 2. |
| | To transfer a portion of the shift hours, click the **Insert Row** icon. In the **In** punch cell in the new row enter the starting time shift being transferred. |
| 2 | Click in the **Transfer** cell to display the Transfer list. |
| 3 | Does the transfer entry appear in the Transfer list? |
| | If the work rule appears in the Transfer list, select the work rule. Continue to step 7. |
| | If the work rule does not appear in the Transfer list, select **Search**. |
| 4 | To transfer hours to another work rule, click the arrow in the **Work Rule** box and select the appropriate work rule. |
| 5 | When you have completed all transfers, click **OK**. |
| 6 | If necessary, click the **Out** cell that corresponds to the transfer and enter the time the shift ends. |
| 7 | Click **Save**. |