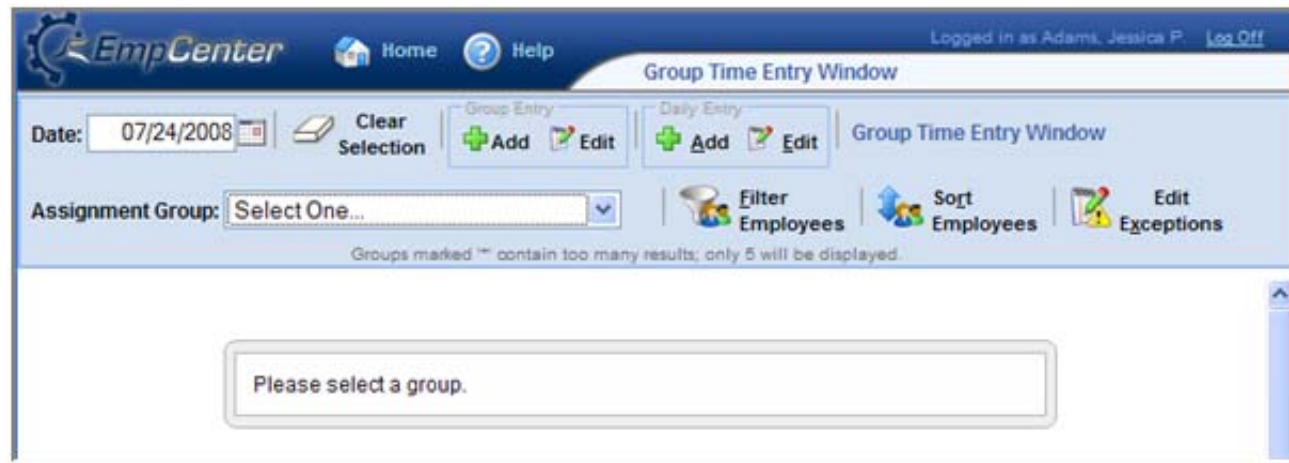You are here: Time & Attendance > Manager Functions in Time & Attendance > About Manager Functions in Time & Attendance > Working with Groups of Records

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Working with Groups of Records

Managers use a special set of tools to select and edit entries for multiple time sheets or schedules. These tools appear in the following example:

Group functions for managers.

Your screen may also contain icons for other tools, depending on the configuration of your organization.

To select group entries

1. Select the appropriate assignment group from the *Assignment Group* drop-down menu.

   Once the relevant information loads, a grid displays employee names, days, and dates.

The grid used to edit an employee, a date, or a specific entry.

The maximum number of assignments displayed in the grid depends on the maximum number defined by your system administrator, which appears below the **Assignment Group** drop-down menu. If an assignment group exceeds the maximum number allowed for display, a message appears above the grid.

Time entries associated with warning and error exceptions appear with a shaded background. Yellow indicates exception warnings, while red indicates error exceptions.

 If your system has been configured to include cross-period exceptions, a cross-period exception button appears to the right of the employee (assignment) name.

2. In most cases, the grid's default view displays the current pay period. To choose a different pay period, select a date that falls within that pay period by doing one of the following:

    ►   Enter a date in the **Date** field. Use one of the following formats: `MM/DD/YY`, `MM/DD/YYYY`, `YY/MM/DD`, or `MM-DD-YY`, including the slashes or dashes.

    ►   Alternatively, click the **Calendar** icon (if available) and select a date.

    After selecting a new date, the grid automatically updates to that date.

3. Select entries to modify by clicking the appropriate cells in the grid.

    ►   To select all dates in the time period, click the cell containing the employee (assignment) name.

    ►   To select a specific date for all members in the group (i.e., a column), click the cell containing the date (the column header).

    ►   To select specific dates for specific members, click the cells you would like to edit.

    ►   To select a range of cells, click the first cell in the range, and then press SHIFT while clicking the last cell in the range.

    ►   To select multiple concurrent cells, click a cell and drag the mouse across additional cells while holding down the mouse button.

4. To edit the assignments of employees in a different group, select a different group from the **Assignment Group** drop-down menu.

5. Click the **Clear Selection** icon to start over.

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Using Other Group Entry Tools

In addition to the standard tools used for working with multiple entries, you can use the following options if your system has been configured to include them.

Icon	Description
Filter Employees	Retrieve a list of records matching a specific set of criteria. The filter searches all assignments to which you have access.
Sort Employees	Arranges your records in a specific order.
Edit Exceptions	Lets you take action on exceptions.

To filter employees

1. Enter your search criteria. For example, you may enter a *Last Name*, *Employee Number*, or *Hire Date*. You can also use a character string and/or the wildcard character (*) to retrieve a list of assignments matching the characters you enter.
2. If you include a wildcard, use the *Max Results* field to limit the number of records displayed.
3. Click **Search** to find the matching records, or click **Cancel** to exit the pop-up without searching.

To sort employees

1. In the list of sort options, arrange the options in the order by which the records will sort. For example, you can sort first by hire date, then by last name, etc.
2. Click **Sort** to use the sort hierarchy you have specified, or click **Close Window** to exit the pop-up without searching.

To edit exceptions

1. Select exceptions to modify by clicking the appropriate cells in the grid.
   - ► To select all dates in the time period, click the cell containing the employee (assignment) name.
   - ► To select a specific date for all members in the group (i.e., a column), click the cell containing the date (the column header).
   - ► To select specific dates for specific members, click the cells you would like to edit.
   - ► To select a range of cells, click the first cell in the range, and then press SHIFT while clicking the last cell in the range.
   - ► To select multiple concurrent cells, click a cell and drag the mouse across additional cells while holding down the mouse button.
2. Click the **Edit Exceptions** button. A new window opens for addressing and resolving exceptions. Depending on your configuration, the appearance of this window varies.
3. To select certain exception types, complete the following:

a. Click the **Exception Filter** button.

The Exception Filter dialog opens, which lets you select specific exceptions and filter exceptions by severity level.

b. From the *Minimum Exception Severity Level* drop-down menu, select the lowest level exception you want to view or edit.

c. In *Exception Codes*, select the specific exceptions you want to view or edit. By default, the system selects all exception codes.

d. Do one of the following:

- ■ To save your changes, click **Save**. The Exception Filter dialog closes and the Group Time Entry Window displays the filtered results.

- ■ To display all exceptions, click **Reset to Default**. The Exception Filter dialog closes and the Group Time Entry Window displays unfiltered results.

- ■ To cancel any filter changes, click **Close Window**. The Exception Filter dialog closes and the Group Time Entry Window display does not change.

4. Make the necessary changes or additions.

- ► Click the **Insert** icon to add time or schedule entries.

- ► Click the **Delete** icon to delete time or schedule entries.

- ► Select the *Acknowledged* checkbox to acknowledge the exception.

5. Save your work.

- ► Click the **Save** icon to save your changes.

- ► Click the **Save & Return** icon to save your changes and go back to the entry grid.

- ► Click the **Back** icon to exit the window without saving your changes.

Adding and Editing Group Entries

You can add and edit entries for just a few records or a large number of records.

To add or edit group entries

1. Select the cells for which entries are to be added or modified.
2. Choose the task and method to be performed.
   - ► In the Group Entry area, click **Add** or **Edit** to add or edit large groups of entries. This is a good choice when you have selected dates for entire groups of assignments.
   - ► In the Daily Entry area, click **Add** or **Edit** to add or edit daily entries. This is a good choice when you have selected just a few assignments or an individual assignment.

   A new window opens for adding and editing group entries, in either Group Entry view or Day View. The overall appearance of the window differs slightly from Table View or List View in the Time Entry Window, although the general structure is the same.

Group Entry view in the Group Time Entry Window.

Employee (Assignment) ▾	Date ▾	Action	Pay code	Hours	Project	Task
Jones, Liz A	Mon 09/27	⊕⊖	Regular ▾	8.0	▢	▢
Jones, Liz A	Tue 09/28	⊕⊖	OVERTIME ▾	3.0	▢	▢
Jones, Liz A	Wed 09/29	⊕⊖	Regular ▾	8.0	▢	▢
Jones, Liz A	Thu 09/30	⊕⊖	Regular ▾	8.0	▢	▢
Jones, Liz A	Fri 10/01	⊕⊖	Regular ▾	8.0	▢	▢
Almeda, Tony	Mon 09/27	⊕⊖	Regular ▾	8.0	▢	▢
Almeda, Tony	Tue 09/28	⊕⊖	Regular ▾	8.0	▢	▢
Almeda, Tony	Wed 09/29	⊕⊖	Regular ▾	8.0	▢	▢
Almeda, Tony	Thu 09/30	⊕⊖	Regular ▾	8.0	▢	▢
Almeda, Tony	Fri 10/01	⊕⊖	Regular ▾	8.0	▢	▢

Day View in the Group Time Entry Window

When you select one or more assignments for editing, the screen displays the pay code for the in and out times, and groups together consecutive in and out times with the same pay code. In and out times are grouped together even if there are gaps between them, provided that the times are not separated by another in and out time with a different pay code.

For example, in the Group Entry view, the *Regular* pay codes are grouped together in one row, and the *OVERTIME* pay code is grouped in a different row, similar to the Table View in the Time Entry Window. The Day View lists each employee's worked days in a separate row, similar to the List View in the Time Entry Window.

3. Make the necessary changes or additions.
   - ► Click the **Insert** icon to add time or schedule entries.
   - ► Click the **Delete** icon to delete time or schedule entries.
   - ► Use Tab or Shift + Tab to move between fields.
4. Save your work.
   - ► Click the **Save** icon to save your changes.
   - ► Click the **Save & Return** icon to save your changes and go back to the entry grid.
   - ► Click the **Back** icon to exit the window without saving your changes.