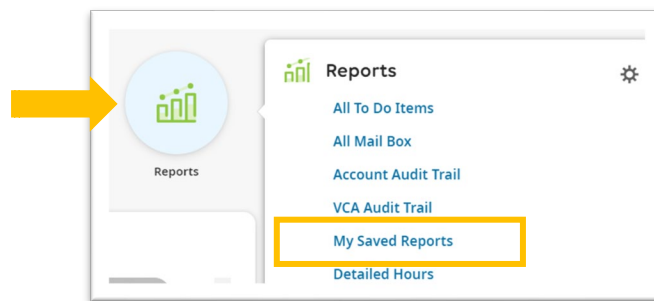


Quick Guide: UMW Schedule Period Report

Overview: The UMW Schedule Period Report is used to view employee hours and confirm any minimum hour requirements based on each employee classification. This report is available to all employees and supervisors.

- Filters and calendars allow tailored pay period views for semi-monthly and bi-weekly payrolls.
- Filters are available for employee classifications, payroll dates, working and non-working hours and timesheet drill down
- The report is best used when filtering by employee classification and/or pay period
- The report will not show timesheets with zero hours

Navigation: *Dashboard > Reports icon > My Saved Reports* or via the *My Saved Reports* widget located at the bottom of the Dashboard.



Report View

- The default view shows all employees with working hours within the previous 80-hour scheduled period, as viewed on the *Counter Date* Counter Date: 07/01/2024 - 07/14/2024 calendar.
- Grouped by **employee**, the default view lists each **pay period**, **total hours worked per pay period**, and **total hours worked for the scheduled period** as viewed and based on the *Counter Date* calendar.

Grouped By	Employee Type	Total Hours	Un.
Employee			
<div style="border: 1px solid blue; border-radius: 50%; padding: 2px;"> [Redacted] Noel, Akaumen </div>		80.00	
	Classified Exempt	16.00	
	Classified Exempt	24.00	
	Classified Exempt	40.00	

Open Timesheet: Noel J. Akaumen 12/25/2023 - 01/09/2024



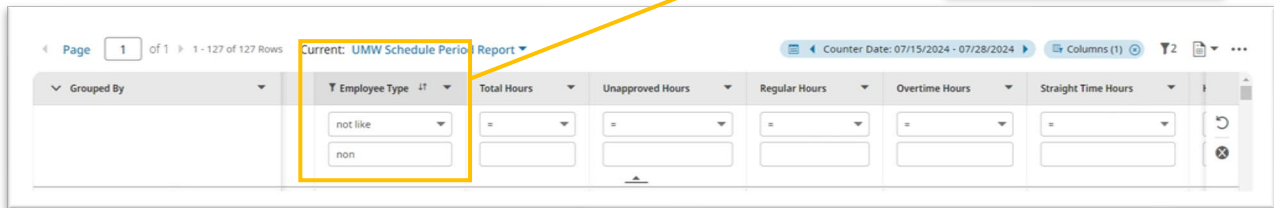
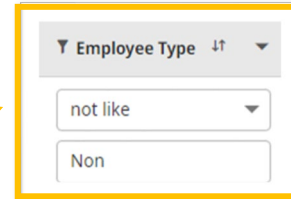
[Create a New View:](#) add or remove additional column headers

View Employees by Classification

- View [Exempt](#) Employees by Scheduled Period
- View [Classified Non-Exempt](#) Employees by Pay Period
- View [Student and Wage](#) Employees by Pay Period

View Exempt Employees by Scheduled Period

1. Change the *Employee Type* dropdown to **not like** and enter the word '**Non**' in the box below. Employee timesheets associated with the scheduled period will be grouped by employee.



Note: The *Total Hours* worked column represents the 80-hour scheduled period total. Exempt employees should have a minimum of 80 hours.

If the Total Hours is less than 80 hours, review the payroll [Semi-Monthly Pay Period calendar](#) to verify the pay period and associated scheduled period (s). It is possible that the pay period requires two scheduled period reviews. Use the arrows on the *Counter Date* calendar to scroll to the previous or the next scheduled period to evaluate all pay period dates associated with the 80-hour scheduled period.

Example:

Pay Period Start	Pay Period End	Timesheet Deadlines Submission by 9AM Approval by 10AM
12/25/23	01/09/24	01/10/24
01/10/24	01/24/24	01/25/24

The pay period for 1/10/24 to 1/24/24 falls within two scheduled periods.

80 Hour Schedule Period for Exempt Employees (2 Week Work Period, Monday-Sunday)	
1/01/24-1/14/24	7/15/24-7/28/24
1/15/24-1/28/24	7/29/24-8/11/24
1/29/24-2/11/24	8/12/24-8/25/24

2. Set the *Counter Date* to the previous scheduled period which will include the pay period range of 01/10/24 to 01/14/24

◀ Counter Date: 01/01/2024 - 01/14/2024 ▶

- The Counter Date will need to be moved forward to the next scheduled period of 01/15/24 to 01/28/24 to capture the payroll range of 01/15/24 to 1/25/24.

◀ Counter Date: 01/15/2024 - 01/28/2024 ▶

January pay period 1/10/24 to 1/24/24 within the 2 associated scheduled period ranges

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

- Open the timesheet

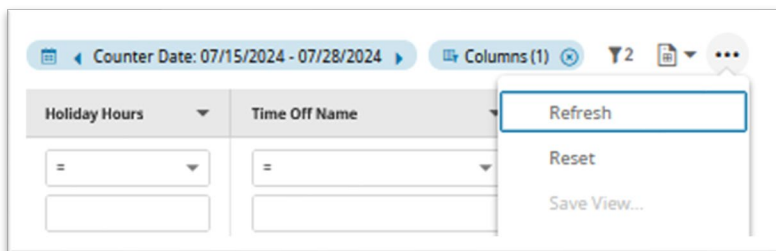


For **Classified Exempt** employees verify:

- ✓ The Total Hours column is equal to or greater than 80 (hours would only be less than 80 for quasi employees, and then should be equal or greater to their minimum required hours).
- ✓ All Unapproved Hours have been reviewed and fully or partially approved.
- ✓ All Comp Time Earned Hours and Time Off Hours are correct
- ✓ For specific departments-all other hours (Shift Pay, Call Back, Event Pay) are correct

If date filtering was added, change the *Counter Date* back to the *Schedule period*:

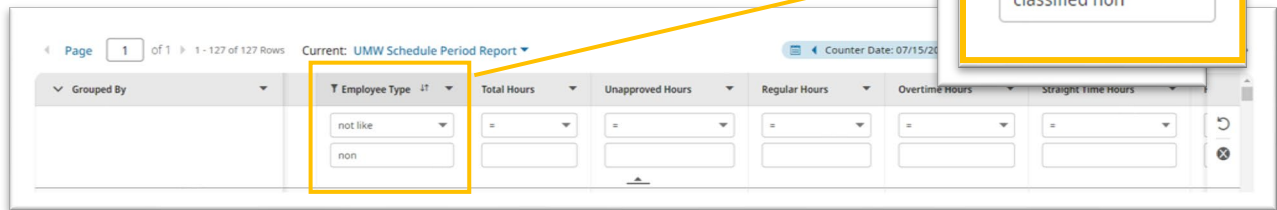
- Select the horizontal ellipsis
- Select Reset and *Confirm Reset Changes*



View Non-Exempt Employees by Pay Period

1. Change the Employee type dropdown to **like** and insert the words **non-exempt**

- Employee timesheets associated with the scheduled period will be grouped by employee.



2. Change the *Counter Date* calendar dates to reflect the Monday – Sunday work weeks that include dates for the pay period you are viewing.

Non-exempt employees should have a minimum 40 hours in the Total Hours column

Note: The filter function can be used to change the employee type and date range as well.

1. Open the filter
2. Type field: insert Date Range
 - a. From field: begin date of current or previous pay period
 - b. To field: end date of current or previous pay period
3. Type field: insert *Pay Period*
 - a. Profile: choose *Classified Semi-Monthly profiles*
 - b. Pay Period: choose *Current or Previous*

3. Open the timesheet



For **Classified Non-Exempt** employees, verify:


- ✓ Total Hours column per week equals a minimum 40 hours
- ✓ All Overtime hours are correct
- ✓ All Comp time Earned and Time Off Hours are correct
- ✓ For specific departments - all other hours (Shift Pay, Call Back, Event Pay) are correct

4. Edit, approve or reject the timesheet
5. Navigate back to the *UMW Schedule Period Report* by using the back arrow


← Timesheet Edit

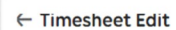
View Student and Wage Employees by Pay Period

1. Change the Employee type dropdown to **like** and insert the word **Student** > press **Enter**
 - You will see non-student wage, student stipend and student wage employees
2. Change the *Counter Date* to reflect the current or previous pay period

Note: The  filter function can be used to change the employee type and date range as well.

1. Open filter
2. Type field: insert Date Range
 - a. From field: begin date of current or previous pay period
 - b. To field: end date of current or previous pay period
3. Type field: insert *Pay Period*
 - a. Profile: choose *Wage-Bi-Weekly*
 - b. Pay Period: choose *Current or Previous*

3. Open the timesheet 
4. Verify all student hours are correct. Edit, approve or reject the timesheet.
5. Navigate back to the UMW Scheduled Period Report by use of the back arrow



To change the *Counter Date* back to the **Schedule** period:


- ✓ Select the horizontal ellipsis
- ✓ Select Reset and *Confirm Reset Changes*

Create a new View:

Add or Remove Additional Column Headers

Reports are views that can be edited for additional views and saved or discarded. Below are the steps for adding, saving and editing a view to the existent UMW Schedule Period Report.

Add Columns

1. Scroll to the far right of the page and select the horizontal ellipsis 
2. Select *Add/Remove Columns*
3. From *Available Columns*, check the box beside each column you'd like to add. This example will use the *Rate Table* to include the pay per hour.
4. Enter *Rate Table* into the Search field and select *Counter: Rate Table 1 Rate* and then select *Add*.

Add/Remove Columns

rate table

Available Columns

Counter: Avg. Rate Table 1 Rate

Counter: **Rate Table 1 Rate**

Add

→

Current Columns

Counter: Hours By: Emergency Closing

Counter: Hours By: Restricted On Call Exempt

Counter: Hours By: Restricted On Call Reg


Counter: **Rate Table 1 Rate**

Apply

5. The column header will be added to the bottom of *Current Columns*. Use the Up arrow to move the new header to the desired location in the report, then select *Apply*.

Save/Delete the New Report View

Save the View

1. Open the ellipsis 
2. Select *Save View As*
3. Name the report
4. Enter a Description
5. Select *My Default* and *Run Immediately* if you choose to return to this view each time when the report is opened

The custom report name will appear at the top of the report in the Current field (and in all My *Saved Report* views). Click on the down arrow beside the name to toggle between your default report and other existing reports.

Delete the Saved Report View

1. Ensure the correct view is selected
2. Open the ellipsis
3. Select *Manage Views*
4. In the *Actions* column, open the ellipsis and select *Delete*


Current: *New saved report* ▼

Remove Columns from Saved Views

1. Ensure the correct view is selected
2. Open the *ellipsis*
3. Select *Add/Remove Columns*
4. In *Current Columns*- select the column for removal
5. Select *Remove > Apply*
6. Click the ellipsis and choose *Save View* to update the existing view or *Save View As* to create a new view

Current: *New saved report* ▼

Extract the Report

1. Open the ellipsis and select *Export* 
2. Select the preferred format from the *Export File As* selection dropdown
3. Select the Page Break preference and Header/Footer Display
4. Select *Export*

