UD WorkForce
Time & Attendance - New Implementation

Focus Group Training for Validation Session 6/17
June 4, 2020
Few Quick Updates

- Vendor completed the Build of the new system
- Test System has been turned over to the Core Project Team for in-depth testing
Digital Communications

- UD WorkForce Website  http://www.udel.edu/udworkforce
- Campus Posters
- Campus Blast Email from the Payroll Department
- Weekly Communications & Marketing email from John Brennan
- Working at UD (HR Newsletter) – June edition
- Digital Ads on some of the College/Department websites
- UDaily Article June-end/July
Today’s Agenda

1. Preparation for the 6/17 Testing Sessions
   – Logistics
   – Explain how Test Scripts will be executed
   – Testing Cover Sheets
   – Test Script Examples

2. A look into the UD WorkForce System
   – Slides of the Key Highlights
   – Demo the New Features
Logistics for 6/17 Validation Sessions

- Zoom Meeting(s)
- Break Out Rooms
- Facilitator in each Room to assist with executing the tests
- Google Shared Drive – will contain documents for you to test with
- Testing continues (if need be) following the 6/17 initial session at your own pace
- Friday, 6/19 Zoom Meeting - Open Forum from 8am to 12pm
  - Core Team Member will be available to answer any questions you might have following the initial 6/17 testing sessions
Part 1 – Preparation for 6/17 Validation Sessions

• At the begin of this session, I mentioned two documents we would reference later. Now’s the time:
  1. Example/Sample Testing Cover Sheet
  2. Example/Sample Test Script

• First: How to execute Testing Remotely

• Second: How to execute a Test Scenario
Prior to 6/17, each Focus Group Member will receive an email containing an Invite to the UD WorkForce Focus Group Testing Shared Google Drive.

Every College and Department will be listed within the Shared Drive.

Each Focus Group Member within their College/Dept Folder will be listed by Name.

Every Person’s own Folder will contain 2 Folders and a Test Cover Sheet.
Let’s talk about the contents of YOUR Folder on the Shared Drive:

- Your College/Dept
- Your Name

Every Script listed on your Cover Sheet can be found in this folder.

Test which Fail – share helpful info here.

Your personalized Cover Sheet is located here.
Testing Cover Sheet

- **Focus Group Member** – each Cover Sheet is customized to that person’s population(s)
- **Steps** – you will be validating all the key functions within the system (you must execute every Test Script in a Step before proceeding to the next Step)
- **Role** – within each Step, you will be “wearing multiple hats”
- **UserId** – to assume these Roles, you will need to signon as different Users
- **Test Script ID** - each test scenario you execute has a unique Google Sheet name
- **Policy Profile** – type of population
Executing a Test Script – Signing On

• Due to the sensitivity of the following information:
  1. Link to Test System
  2. Userids
  3. Passwords
• This will be placed in each of your Shared Drive personal folders prior to the Testing Session(s)
Executing a Test Script

Step 1 on Cover Sheet
Enter a TOR
Test Script ID

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Test Steps (To be executed in order)</th>
<th>Expected Results (Action to be taken)</th>
<th>Actual Results (Record what actually happens)</th>
<th>Pass/Fail (P indicates Test Passed, F indicates Test Failed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log in as user noted above</td>
<td>Home Screen is displayed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Click the 'My Time Off' link within the Schedules Section</td>
<td>The 'My Time Off' Screen appears</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Click the 'Create New Request' link</td>
<td>The 'Create Time Off Request' Screen appears</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>From the 'Time Off Type' drop-down list, select 'Vacation'</td>
<td>Vacation' is shown in the 'Time Off Type' Box</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Enter 'Start' and 'End' Dates for the request.</td>
<td>Dates are shown accordingly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Enter a comment into the 'Comments' Box</td>
<td>Comments are accepted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Click the 'Next' button</td>
<td>The 'Request Details' Screen and Bank Usage appear</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Click the 'Submit' Button</td>
<td>Status Message 'The request has been successfully submitted' appears</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Click 'Ok'</td>
<td>System returns to the 'Create New Request' Screen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Verify the request is listed on the 'Current' Tab</td>
<td>New Vacation request is listed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Click the 'Logout' link (upper right corner)</td>
<td>Returned to Login Screen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>TEST has been completed.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Executing another Test Script

### Step 2 of 4
**Approving Test Script**

<table>
<thead>
<tr>
<th>Test Script #</th>
<th>CWIZ_MGR_STEX_ATOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Script Name</td>
<td>Manager Approves a Time Off Request</td>
</tr>
<tr>
<td>Test Scenario</td>
<td>Manager approves a TOR for Vacation Time</td>
</tr>
<tr>
<td>College/Department</td>
<td>College of Wizardry (your College/Dept here)</td>
</tr>
<tr>
<td>Tester</td>
<td>Harry Potter (your Name here)</td>
</tr>
<tr>
<td>Role</td>
<td>Manager</td>
</tr>
<tr>
<td>Userid</td>
<td>999998</td>
</tr>
</tbody>
</table>

### Step 2:

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Test Step(s)</th>
<th>Expected Results</th>
<th>Actual Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log in as user noted above</td>
<td>Home Screen is displayed</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Click the ‘Review Time Off Requests’ link within the Schedules Section</td>
<td>The ‘Time Off Review Summary’ S appears</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Double Click Employee ID 999995 within the ‘My Pending Requests’ Tab</td>
<td>The ‘Pending Request Summary’ shown</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Click the ‘Approve Request’ button</td>
<td>Vacation is shown in the ‘Time Off</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Enter comments into ‘Manager Comments’ box</td>
<td>Comments are accepted</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Click the ‘Approve Request’ button</td>
<td>Status Message ‘The request has been successfully approved’</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Click ‘Ok’</td>
<td>System returns to the ‘Time Off Request Summary’ Screen and Emp ID 999 longer in list</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Click the ‘Logout’ link (upper right corner)</td>
<td>Returned to Login Screen</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>TEST has been completed.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Requirements

1. Continue to repeat Test Scripts in every Step until ALL listed in the Testing Cover Sheet are completed.
2. Mark each completed Test Script with your initials in the Google Sheet.
Part 2 – A Look into the UD WorkForce System
Experience UD WorkForce from an Employee’s Perspective – The Home Screen

- Renamed from Enter My Hours
- New way to request time off. Replaces Request for Leave Form
- Enhanced Reporting
- Quick Reference to pending (not yet approved) Time Off Requests (TORs)
- Quick Reference to your current Leave Balances

**Time Entry**
- My Timesheet
- Go to Web Clock

**Schedules**
- My Calendar
- My Time Off

**Leave Balances**
- Comp Time: 0.0000 Hours
- Dependant Sick Bank: 0.0000 Hours
- Long Term Illness: 0.0000 Hours
- Sick: 660.4114 Hours
- Vacation: 197.3200 Hours
- Work Study: 0.0000 Dollars

**Employee Leave Requests**
- HARRY POTTER (Wizard Intern* Potions Lab – UD_BW_606)
  - Details: Pending
  - Status: Pending
  - Date: 11/23/2020 - 11/25/2020
- HARRY POTTER (Wizard Intern* Potions Lab – UD_BW_606)
  - Details: Pending
  - Status: Pending
  - Date: 05/26/2020 - 05/29/2020
- HARRY POTTER (Wizard Intern* Potions Lab – UD_BW_606)
  - Details: Pending
  - Status: Pending
  - Date: 04/30/2020 - 05/01/2020
Experience UD WorkForce from an Employee’s Perspective – The WebClock

WebClock:
- New look
- Same buttons
- Same Functionality

New Link/Button
- Return to Home Screen/Dashboard
UD WorkForce – A Glimpse at Mobile Access

Hourly Employee
- In for Work
- Out from Work
- Hourly Employee

Self-Service
- My Timesheet
- My Schedule
- My Bank Balances
- My Time Off
- Help

Employee

Manager/Timekeeper

Settings
- Auto detection

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Experience UD WorkForce from an Employee’s Perspective

Optional: Enter Comments for a specific time slice if needed

Timesheet:
- New look
- Same Functionality
Experience UD WorkForce from a Manager or Timekeeper’s Perspective

- **NEW** – Send out a mass email notification
- **NEW** – Quick Reference to ALL Pending TORs (including your own)
- **NEW** – Displays your current Leave Balances
- **NEW** – Quick Reference to identify any exceptions on your employees’ timesheets
- **NEW** – Review Time Off Requests from your employees
- **NEW** - ability to assign your authority to another user
- **NEW** - Quick Reference to identify any exceptions on your employees’ timesheets

Time Entry remains the same

Reporting simplified
Experience UD WorkForce through our NEW Roles

You asked – We Listened!

1. **College Business Officer** (as defined in HR Dept Table)
   - Enter, Approve, and Amend Time
   - Access to Reports
   - Ability to Delegate your Role

2. **HR Manager** (as defined in HR Dept Table)
   - Enter a TOR on behalf of an Employee
   - Approve TORs
   - Enter, Approve, and Amend Time
   - Access to Reports
   - Ability to Delegate your Role

3. **Reporter** (as defined in HR Supervisor Table)
   - View Time
   - Access to Reports
   - Ability to Delegate your Role
Next Steps

- June 17th: UD WorkForce System Testing/Validation Sessions
  - You will receive System Validation Packages prior to 6/17
- June-end: Share Training Materials
- Additional Assignment Form
  - Scheduled for Go Live July-end
  - Job Aid being developed for training
- Digital Communication Efforts
Let’s take a look...
Questions