

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

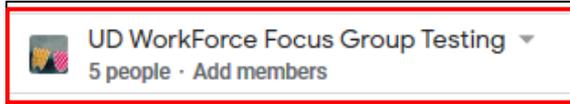
Logistics for 6/17 Validation Sessions

- 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

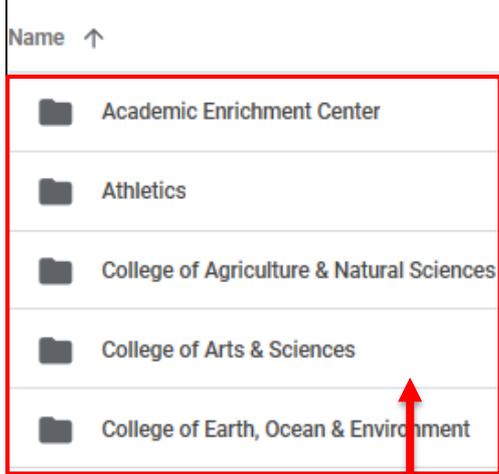
- At the begin of this session, I mentioned two documents we would reference later. Now's the time:
 1. Example/***Sample*** Testing Cover Sheet
 2. Example/***Sample*** Test Script
- **First:** How to execute Testing Remotely
- **Second:** How to execute a Test Scenario

Testing Remotely – Shared Google Drive

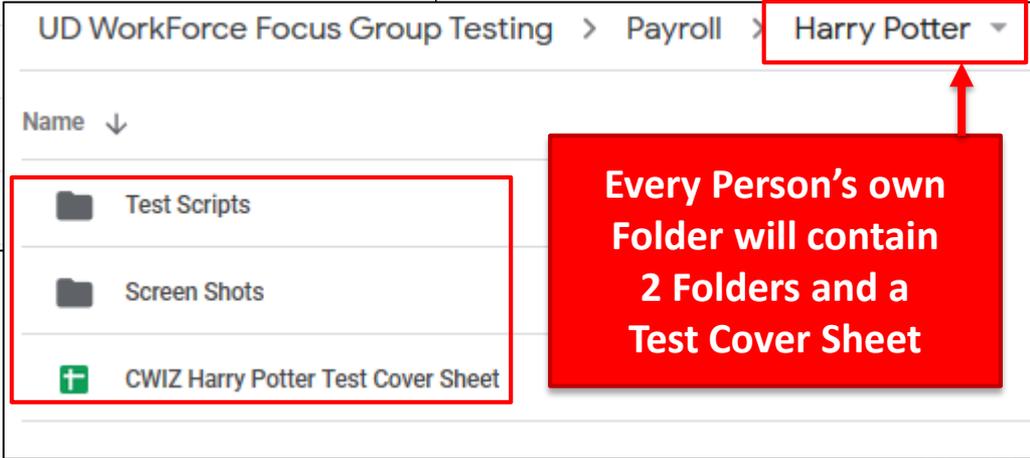
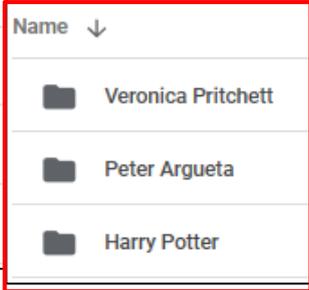


Prior to 6/17, each Focus Group Member will receive an email containing an Invite to the UD WorkForce Focus Group Testing Shared Google Drive

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



Every College and Department will be listed within the Shared Drive



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 → UD WorkForce Focus Group Testing > Payroll > **Your Name** Harry Potter

Test which Fail – share helpful info here → Test Scripts

Test which Fail – share helpful info here → Screen Shots

Your personalized Cover Sheet is located here → CWIZ Harry Potter Test Cover Sheet

Every Script listed on your Cover Sheet can be found in this folder → Test Scripts

WorkForce			Focus Group Member	Harry Potter
			College/Department	College of Wizardry
Initials	Role	Userid	Policy Profile	Test Script ID
Step 1 - Entering Time Off Requests				
	Employee	999998	Staff Exempt	CWIZ_EMP_STEX_ETOR
	Timekeeper	999995	Faculty	CWIZ_TKP_SFAC_ETOR
	Manager	999997	Staff Exempt	CWIZ_MGR_STEX_ETOR
Step 2 - Approving Time Off Requests				
	Timekeeper	999995	Faculty	CWIZ_TKP_SFAC_ATOM
	HR Manager	999994	Staff Exempt	CWIZ_HRM_STEX_ATOM
Step 3 - Entering Time				
		999990	Hourly	CWIZ_EMP_HRLY_ETIM
		999994	AFSCME 3472	CWIZ_EMP_HRLY_ETIM
Step 4 - Approving Time				
		999991	AFSCME 439	CWIZ_TKP_HRLY_ATOM
		999996	Hourly	CWIZ_MGR_HRLY_ATOM
		999994	Hourly	CWIZ_HRM_HRLY_ATOM
Step 5 - Amending Time				
	Timekeeper	700531757	Hourly	CWIZ_TKP_HRLY_AMEN
	Manager	999996	Hourly	CWIZ_MGR_HRLY_AMEN
Step 6 - Viewing Time				
	Reporter	999987	N/A	CWIZ_RPT_NTAP_VTIM
Step 7 - Reporting				
	Reporter	999987	N/A	CWIZ_RPT_NTAP_REPT
Step 8 - Delegation				
	Timekeeper	999995	N/A	CWIZ_TKP_NTAP_DELG
	Manager	999996	N/A	CWIZ_MGR_NTAP_DELG

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

WorkForce			Focus Group Member	Harry Potter
			College/Department	College of Wizardry
Initials	Role	Userid	Policy Profile	Test Script ID
Step 1 - Entering Time Off Requests				
	Employee	999998	Staff Exempt	CWIZ_EMP_STEX_ETOR
	Timekeeper	999995	Faculty	CWIZ_TKP_SFAC_ETOR
	Manager	999997	Staff Exempt	CWIZ_MGR_STEX_ETOR
	HR Manager	999994	Faculty	CWIZ_HRM_SFAC_ETOR
Step 2 - Approving Time Off Requests				
	Timekeeper	999995	Faculty	CWIZ_TKP_SFAC_ATOR
	Manager	999997	Staff Exempt	CWIZ_MGR_STEX_ATOR
	HR Manager	999994	Staff Exempt	CWIZ_HRM_STEX_ATOR
Step 3 - Entering Time				
	Employee	999992	Hourly	CWIZ_EMP_HRLY_ETIM
	Employee	999990	Hourly	CWIZ_EMP_HRLY_ETIM
	CBO	999988	Hourly	CWIZ_CBO_HRLY_ETIM
	HR Manager	999994	Hourly	CWIZ_HRM_HRLY_ETIM
Step 4 - Approving Time				
	Manager	999996	Hourly	CWIZ_MGR_HRLY_ATIM
	CBO	999988	Hourly	CWIZ_CBO_HRLY_ATIM
	HR Manager	999994	Hourly	CWIZ_HRM_HRLY_ATIM
Step 5 - Amending Time				
	Timekeeper	700531757	Hourly	CWIZ_TKP_HRLY_AMEN
	Manager	999996	Hourly	CWIZ_MGR_HRLY_AMEN
	CBO	999988	Hourly	CWIZ_CBO_HRLY_AMEN
	HR Manager	999994	Hourly	CWIZ_HRM_HRLY_AMEN
Step 6 - Viewing Time				

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

Test Script #	CWIZ_EMP_STEX_ETOR
Test Script Name	Staff Exempt Employee Enters a Time Off Request
Test Scenario	Staff Exempt Employee Enters a TOR for Vacation Time
College/Department	College of Wizardry (your College/Dept here)
Tester	Harry Potter (your Name here)
Role	Employee
Userid	999995

**Step 1 on Cover Sheet
Enter a TOR
Test Script ID**

**Requirement # -
For Core Team**

Step Number	Test Step(s)	Expected Results
1	Log in as user noted above	Home Screen is displayed
2	Click the 'My Time Off' link within the Schedules Section	The 'My Time Off' Screen appears
3	Click the 'Create New Request' link	The 'Create Time Off Request' Screen appears
4	From the 'Time Off Type' drop-down list, select 'Vacation'	Vacation is shown in the 'Time Off Type' Box
5	Enter 'Start' and 'End' Dates for the request.	Dates are shown accordingly
6	Enter a comment into the 'Comments' Box	Comments are accepted
7	Click the 'Next' Button	The 'Request Details' Screen and Bank Usage appear
8	Click the 'Submit' Button	Status Message 'The request has been successfully submitted appears'
9	Click 'OK'	System returns to the 'Create New Request' Screen
10	Verify the request is listed on the 'Current' Tab	New Vacation request is listed
11	Click the 'Logout' link (upper right corner)	Returned to Login Screen
12	TEST has been completed.	

The screenshot shows the WorkForce system interface. A dropdown menu is open, displaying a list of test scripts. The menu items include 'Test Scripts', 'Screen Shots', and 'CWIZ Harry Potter Test Cover Sheet'. A red arrow points to the 'Test Scripts' option. The background shows a user profile for Harry Potter, a Staff Exempt Employee at the College of Wizardry.

Step Number To be executed | **Test Steps** Action to be taken | **Expected Results** – exactly that – expected results | **Actual Results** what actually happened | **F** indicates Test Failed

Executing another Test Script

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

Step 2 of 8
Approving Time Off Requests

WorkForce		Focus Group Member	Harry Potter
		College/Department	College of Wizardry
Initials	Role	Userid	Policy Profile
Step 1 - Entering Time Off Requests			
CMC	Employee	999998	Staff Exempt
CMc	Timekeeper	999995	Faculty
CMc	Manager	999997	Staff Exempt
Step 2 - Approving Time Off Requests			
CMc	Timekeeper	999995	Faculty
	HR Manager	999994	Staff Exempt
Step 3 - Entering Time			
	Employee	999990	Hourly
	Employee	999994	AFSCME 3472
Step 4 - Approving Time			
	Timekeeper	999991	AFSCME 439
	Manager	999996	Hourly
	HR Manager	999994	Hourly
Step 5 - Amending Time			
	Timekeeper	700531757	Hourly
	Manager	999996	Hourly
Step 6 - Viewing Time			
	Reporter	999987	N/A
Step 7 - Reporting			
	Reporter	999987	N/A
Step 8 - Delegation			
	Timekeeper	999995	N/A
	Manager	999996	N/A

Test # - am only

Step Number	Test Step(s)	Expected Results
1	Log in as user noted above	Home Screen is displayed
2	Click the 'Review Time Off Requests' link within the Schedules Section	The 'Time Off Review Summary' Screen appears
3	Double Click Employee ID 999995 within the 'My Pending Requests' Tab	The ' Pending Request Summary' Screen is shown
4	Click the 'Approve Request' button	'Vacation' is shown in the 'Time Off Request' Summary
5	Enter comments into 'Manager Comments' box	Comments are accepted
6	Click the 'Approve Request' button	Status Message 'The request has been successfully approved'
7	Click 'OK'	System returns to the 'Time Off Request Summary' Screen and Emp ID 999995 is no longer in list
8	Click the 'Logout' link (upper right corner)	Returned to Login Screen
9	TEST has been completed.	

Test # (s)

Continue to repeat Test Scripts in every Step until ALL listed in the Testing Cover Sheet are completed. 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

The screenshot shows the UD WorkForce Home Screen with a blue header containing the logo, 'Home', 'Help', and 'Logged in'. The main content area is divided into several sections:

- Time Entry:** Contains a 'My Timesheet' link (highlighted with a red box) and a 'Go to Web Clock' link.
- Schedules:** Contains a 'My Calendar' link and a 'My Time Off' link (highlighted with a red box).
- Reporting:** Contains a 'View Reports' link (highlighted with a red box).
- Leave Balances:** A table showing various leave types and their balances.
- Employee Leave Requests:** A table listing pending requests with details, status, and dates.

Yellow callout boxes provide additional information:

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

Renamed from
Enter My
Hours

Quick Reference
to your current
Leave Balances

New way to
request time off.
Replaces Request
for Leave Form

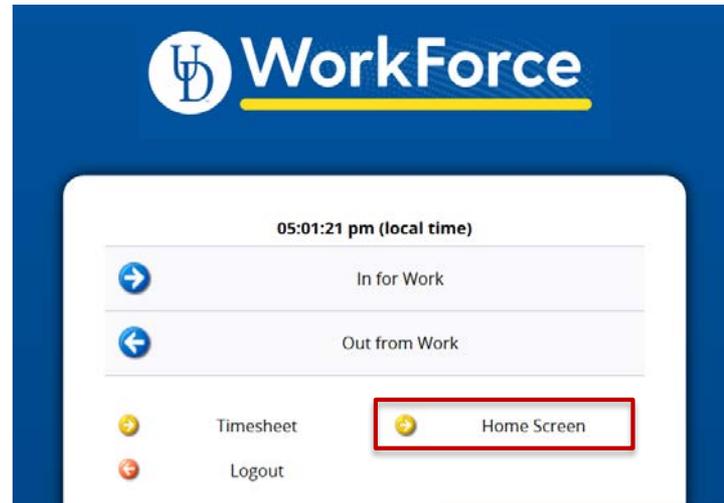
Enhanced
Reporting

Quick Reference to
pending (not yet
approved) Time Off
Requests (TORs)

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		
Details	Status	Date
HARRY POTTER (Wizard Intern* Potions Lab – UD_BW_606)	Pending	11/23/2020 - 11/25/2020
HARRY POTTER (Wizard Intern* Potions Lab – UD_BW_606)	Pending	05/26/2020 - 05/29/2020
HARRY POTTER (Wizard Intern* Potions Lab – UD_BW_606)	Pending	04/30/2020 - 05/01/2020

Experience UD WorkForce from an Employee's Perspective – The WebClock



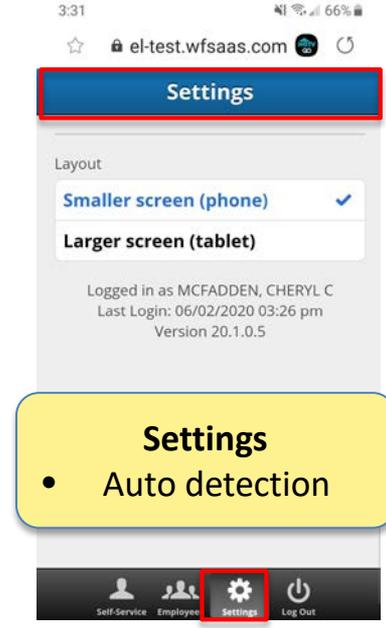
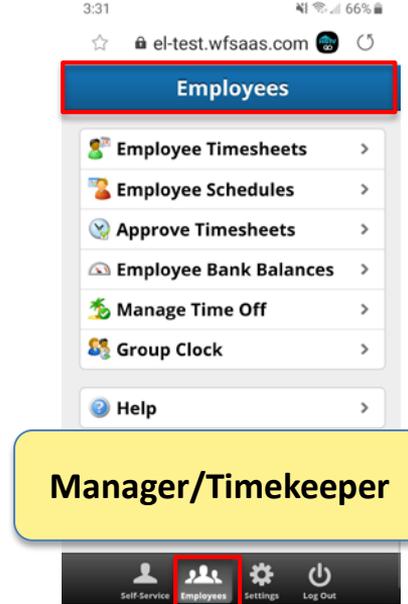
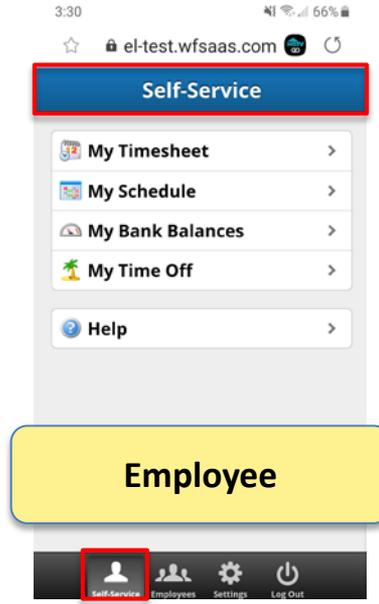
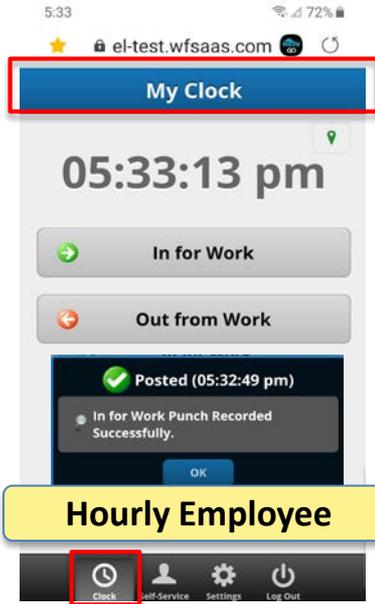
WebClock:

- New look
- Same buttons
- Same Functionality

New Link/Button

- Return to Home Screen/Dashboard

UD WorkForce – A Glimpse at Mobile Access



Experience UD WorkForce from an Employee's Perspective

WorkForce Home Help | Logged in as Black, Sirius | Log Out

My Time Entry: Black, Sirius 20.1.0.4

12/29/2019 - 01/11/2020 Save More List View

Time Entry 80.00 total hours

Date	Entry Code	Hours	Override Rate	Adjust Reason	Comments	SOE
Mon 12/30	Regular Time	05:00 am	0.00			
		01:30 pm				
Tue 12/31	Regular Time	05:00 am	0.00			
		01:30 pm				
Wed 01/01	Regular	05:00 am	0.00			
		01:30 pm				
	Holiday	8.00	0.00			
	Regular Time	05:00 am	0.00			
		01:30 pm				
	Regular Time	05:00 am	0.00			
		01:30 pm				

Exceptions Schedule Punch Log Time Off Results

Timesheet:

- New look
- Same Functionality

Optional:
Enter **Comments** for
a specific time slice if
needed

Experience UD WorkForce from a Manager or Timekeeper's Perspective

The screenshot shows the UD WorkForce system interface. The top navigation bar includes the WorkForce logo, Home, Help, and user information (Logged in as Granger, Hermione Jean | Log Out). The main content area is divided into several sections:

- Time Entry:** My Timesheet, Edit Employee Time, Edit Time for Groups, Approve Timesheets.
- Schedules:** My Calendar, My Time Off, Review Time Off Requests.
- Leave Requests:** Details table showing Hermione Granger (Minister for Magic-Minister for Magic-UD_STAFF_EX (0)) with a Pending status.
- Leave Balances:** Table showing various leave types and their balances.
- Reporting:** View Reports.
- Employees:** Group Messaging.
- Settings:** Manage Delegations.
- Exceptions:** Michael Jackson, Mon 05/11, Time Entry: Missing In or Out time.

Callouts highlight new features:

- Time Entry remains the same** (points to the Time Entry section).
- NEW way to request time off** (points to My Time Off).
- NEW - Review Time Off Requests from your employees** (points to Review Time Off Requests).
- NEW - Send out a mass email notification** (points to Group Messaging).
- NEW - ability to assign your authority to another user** (points to Manage Delegations).
- NEW - Quick Reference to ALL Pending TORs (including your own)** (points to the Leave Requests table).
- NEW - Displays your current Leave Balances** (points to the Leave Balances table).
- NEW - Quick Reference to identify any exceptions on your employees' timesheets** (points to the Exceptions section).

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

