FIO-14 Manager Time Leveling

View Manager Time Leveling Tutorial Video

Purpose

The purpose of this BPP is to show how the Time Leveling Report can help supervisors monitor their direct reports' time entry data and determine whether employees' target hours recorded for the period or working week have been met.

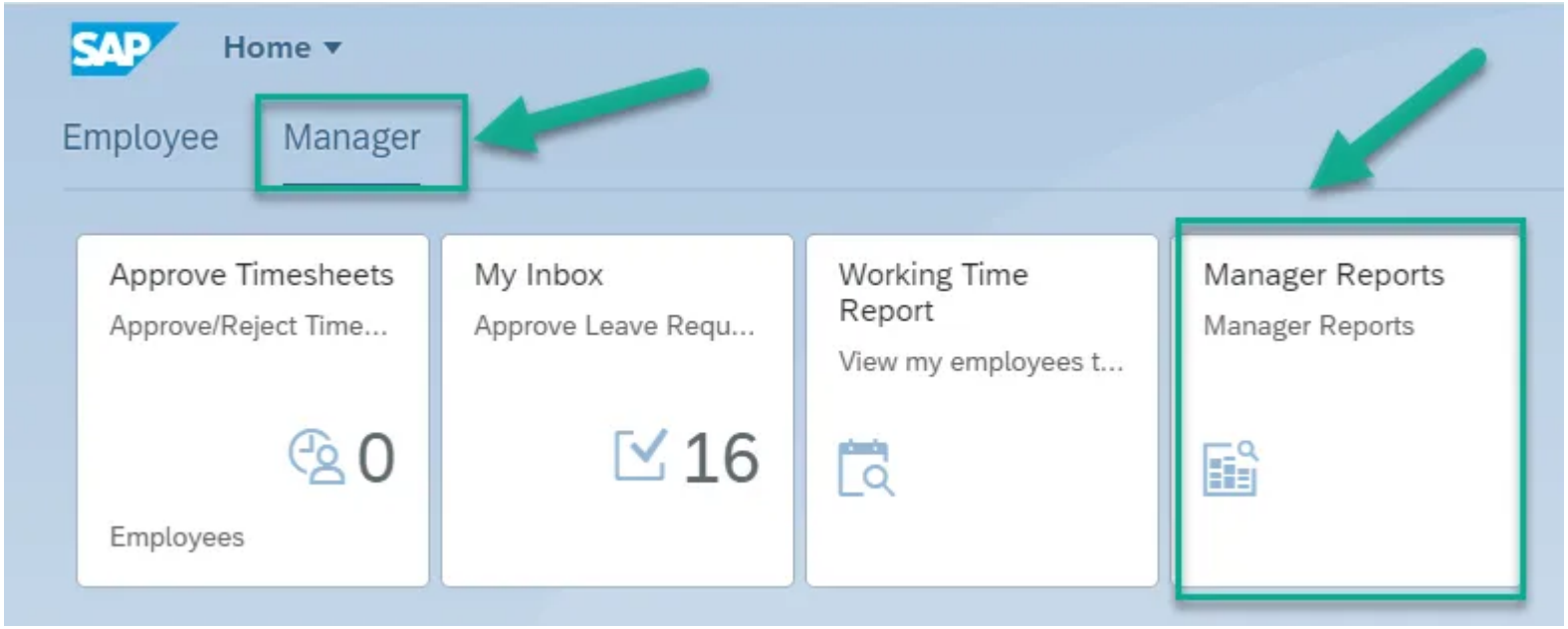
The Time Leveling report can be found on the Time & Leave card within the Manager Reports tile.

How to Access Time Leveling

There are 4 steps to complete this process.

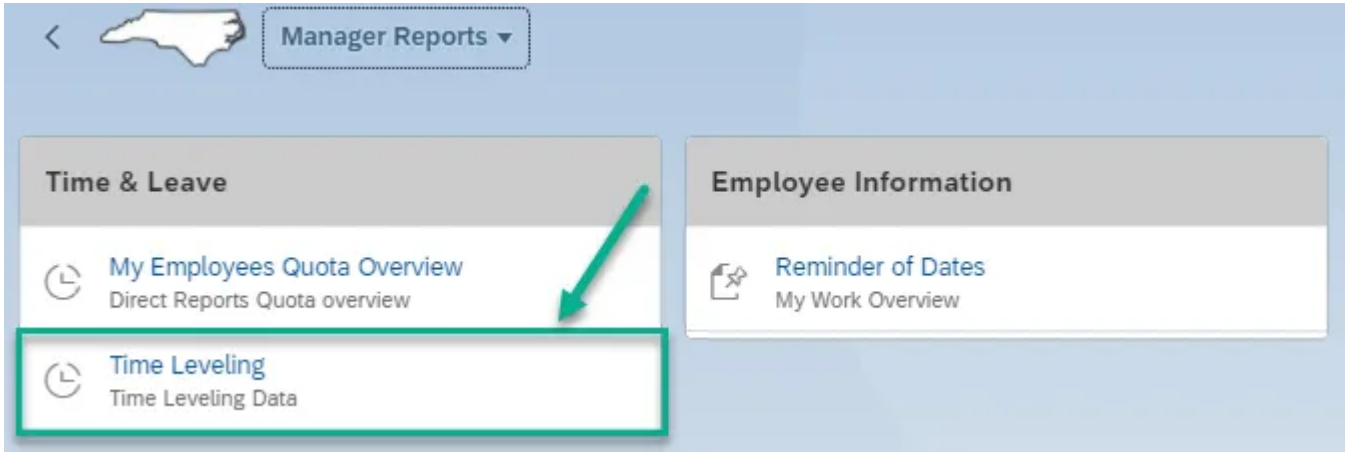
Step 1. From the Fiori Homepage, on the **Manager** tab click on the **Manager Report** tile.

Image



Step 2. Click on the **Time Leveling** link.

Image



The Time Leveling Report delivers the employees' working week following the manager's settings by default when displayed.

The Time Leveling Report allows for working week date overrides within the Begin Date and End Date fields.

Date overrides:

When the date selection is used, the Start and End Date must be selected. If only the Begin date is selected and the End date is left blank, the default is today. The same is true for the reverse. If the End Date is selected and the Begin date is left blank, the default is today. If the date fields are left blank, the content will be delivered following the default of the current week.

There are two data fields:

- **Employee Name** is a filter field - All direct reports are delivered by default. The direct reports relationship is set on the position. The filter option allows a manager to override the default to a specific employee data set.
- **Begin Date and End Date**
    - When the date override is defined, the period delivered follows the selection dates within the **Begin Date** and **End Date** fields and no longer follow the manager's working week. When the date fields are used, the user must select Go for the report to deliver the expected results.
- **Clear** resets the Employee Name filter to All and the Begin Data and End Date back to default.
- **Export to Excel** icon delivers the report content to a savable spreadsheet.

When the report is deployed, you can see the employee's name, the beginning date, the ending date, the target hours for the dates shown, the recorded hours for the dates shown, and the variance.

The variance is color coded:

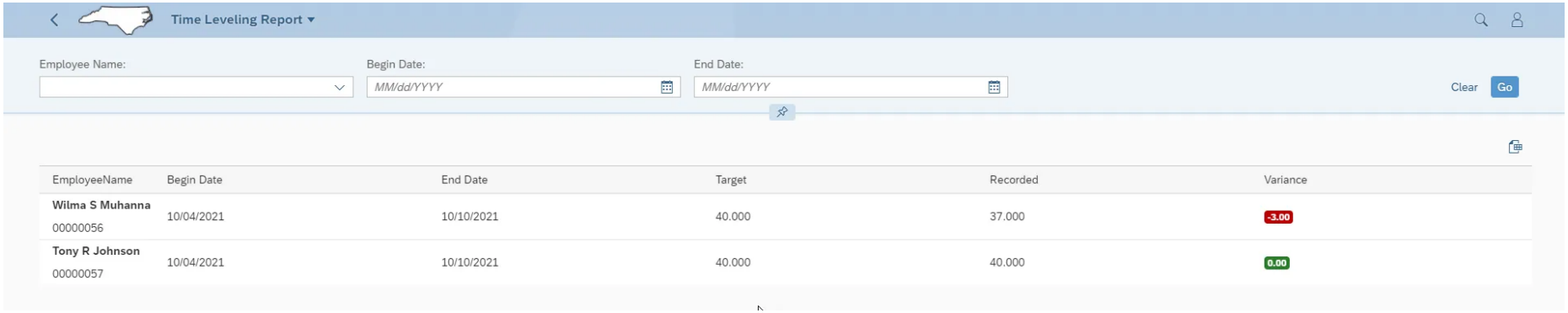
- Meets target hours (Green)
- Exceeds target hours (Orange)
- Less than target hours. (Red)

The current week is extracted by default. In this case the manager's working week is **Monday - Sunday**. Because the manager's working week is **Monday - Sunday**, the default period will represent that of the managers as defined within the master data settings.

In the example below, Wilma is expected for 40 hrs. for the working period and has recorded 37 hours, so the variance represents three hours less or short and is represented in **RED**.

Tony has recorded the expected hours equal to 40, therefore, the variance is represented as 0.00 hrs. and is represented in **GREEN**.

Image

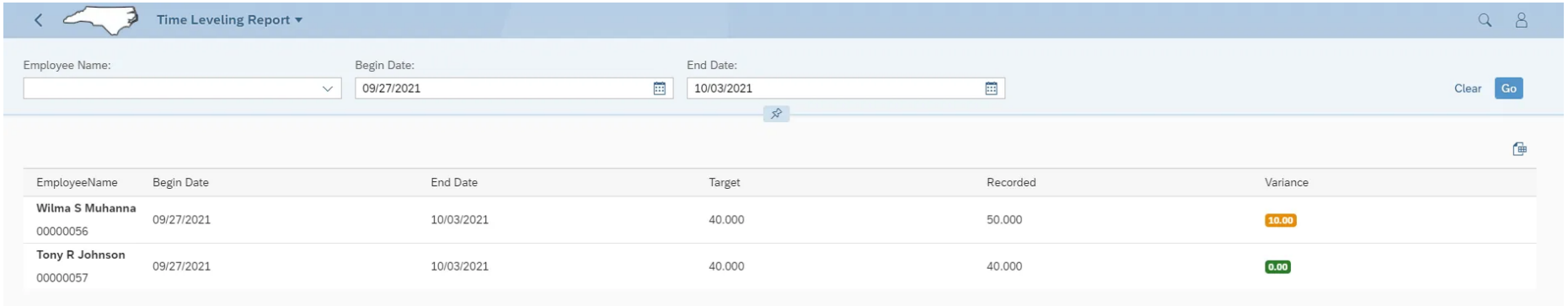


The Begin Date and End Date were selected as 9/27/2021-10/3/2021. By default, the current week is delivered. To view weeks outside of the current week, the dates must be selected within the date selection fields.

Wilma is expected for 40 hrs. for the working period and has recorded **50 hours**, so the **variance** represents 10 hours more or in excess and is represented in orange/yellow.

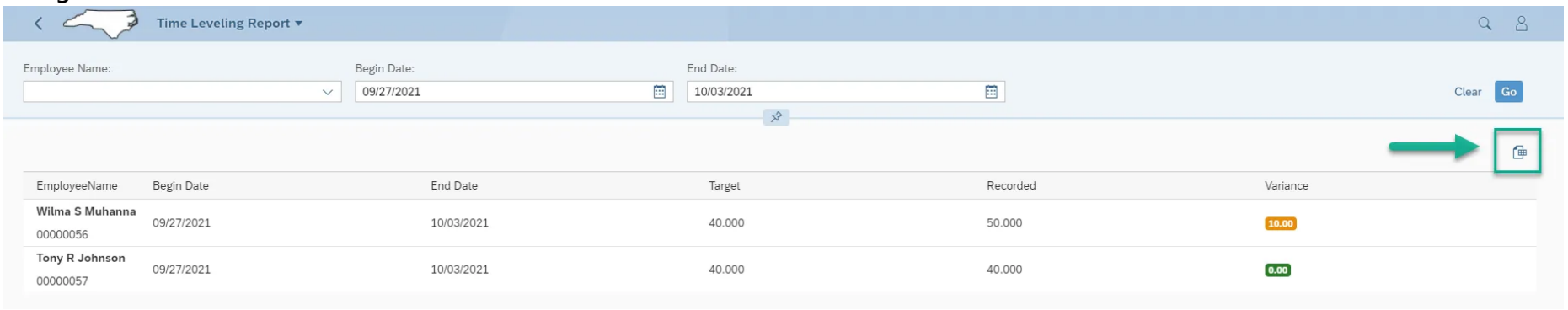
Tony has recorded the expected hours equal to 40, therefor the **variance is represented** as 0.00 hrs. and is represented in **GREEN**.

Image



Step 3. To **Export** the report, click on **Export to Excel** icon.

Image



Step 4. To go back to the **Homepage**, click on **Time Leveling Report**.

Image

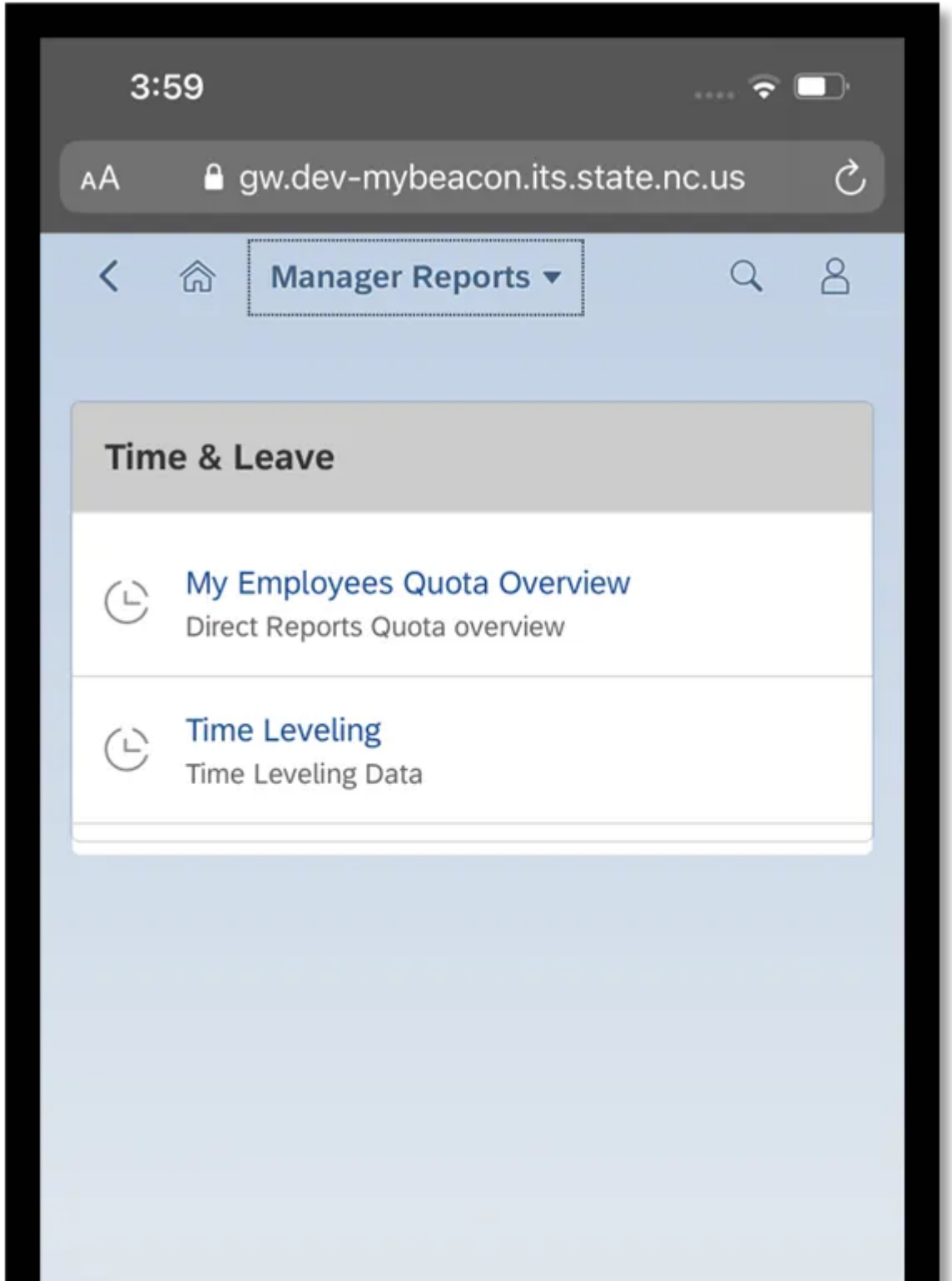


Mobile:

The **Time Leveling** report is also accessible using a **Mobile Device**. The **Time Leveling Report** can be accessed through the **Manager Reports** application.

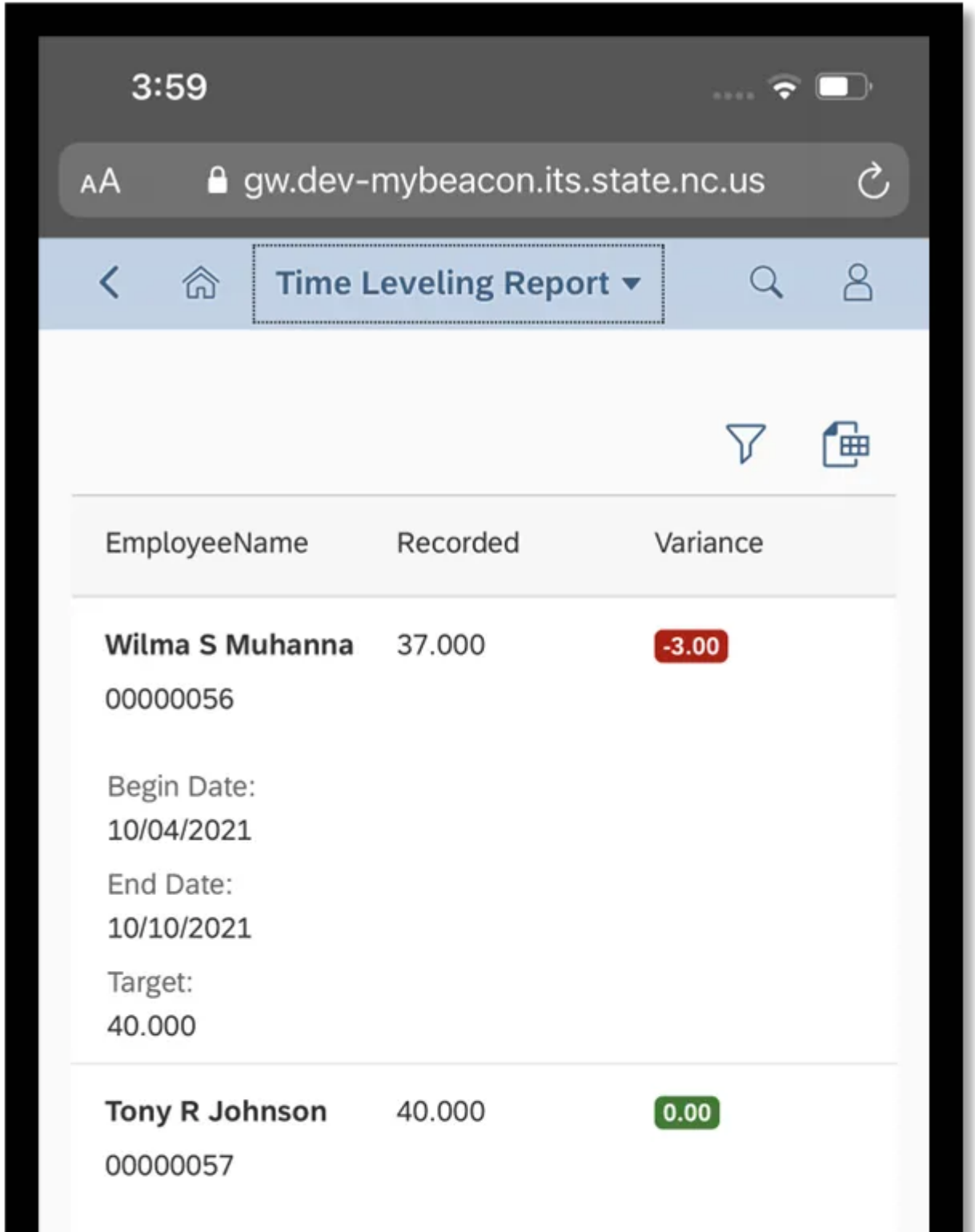
When the **Time Leveling** link is selected from the Time & Leave card, the report is executed and shows you whether your employees have met their expected target hours, have recorded more hours than expected, or have recorded less hours than the target.

Image


3:59
AA
gw.dev-mybeacon.its.state.nc.us
Manager Reports
Time & Leave
My Employees Quota Overview
Direct Reports Quota overview
Time Leveling
Time Leveling Data

On **Mobile**, the default layout represents the Employee Name, hours Recorded and Variance along the top, while the period and Target hours are shown down the side. The default reporting period is current week.

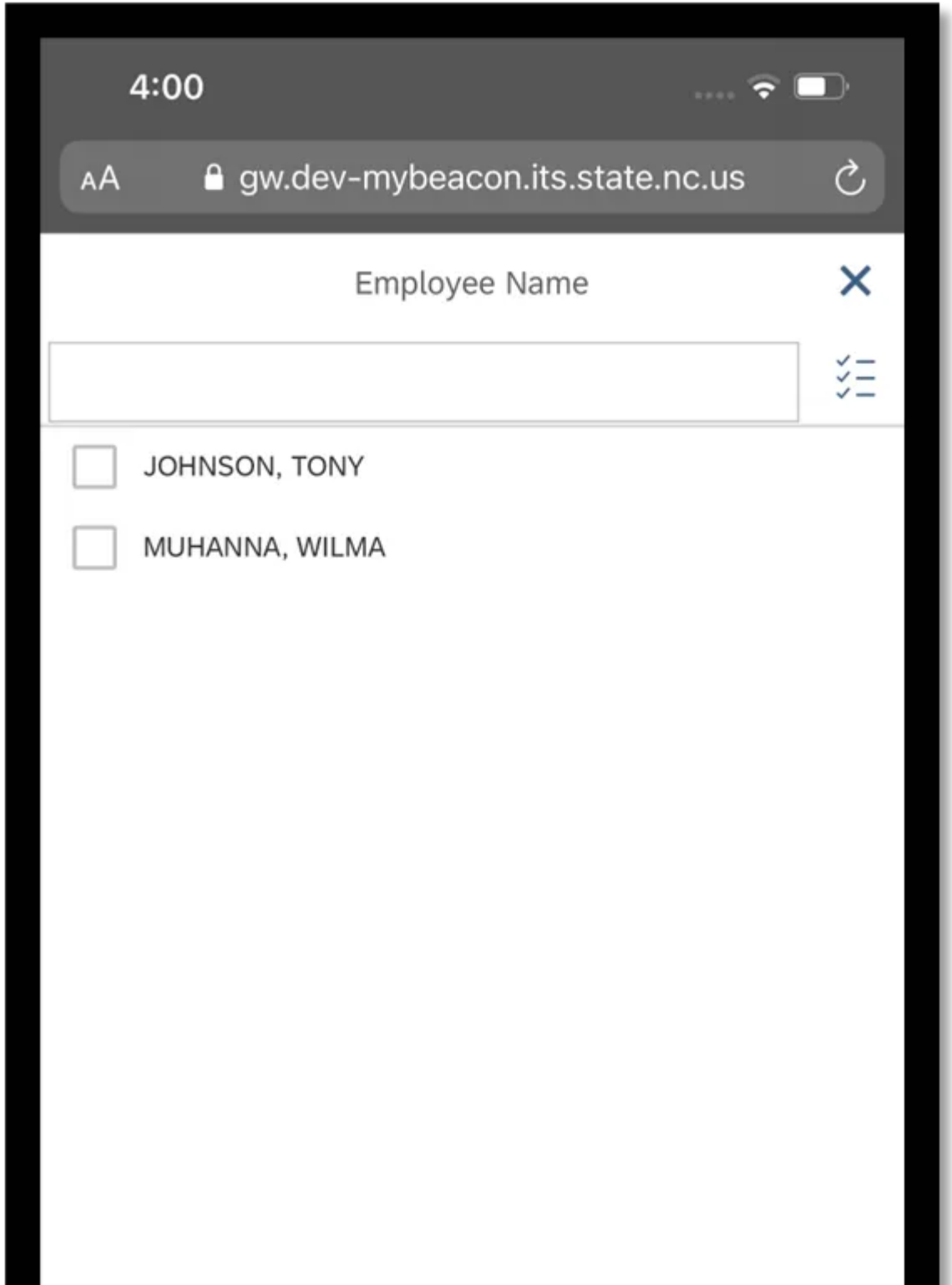
Image


3:59
AA
gw.dev-mybeacon.its.state.nc.us
Time Leveling Report
EmployeeName
Recorded
Variance
Wilma S Muhanna
37.000
-3.00
00000056
Begin Date:
10/04/2021
End Date:
10/10/2021
Target:
40.000
Tony R Johnson
40.000
0.00
00000057

When the **filter** is selected, you have the options to select Employee’s individually and use the date fields to select the reporting period if you wish to report on a period other than the defaulted current week. **OK** generates the report with the filter selections chosen.

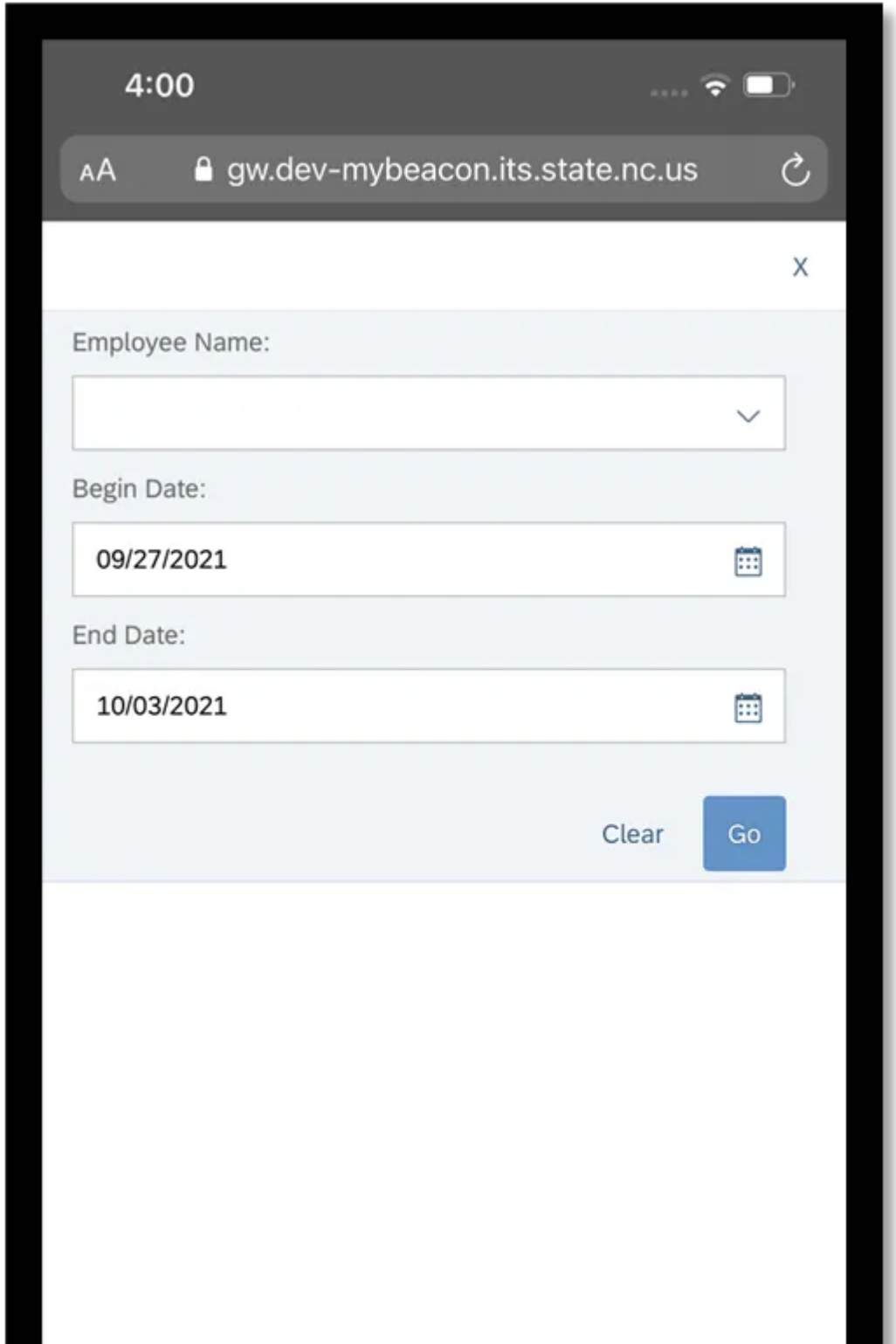
Employee Name filter:

Image


4:00
AA
gw.dev-mybeacon.its.state.nc.us
Employee Name
JOHNSON, TONY
MUHANNA, WILMA

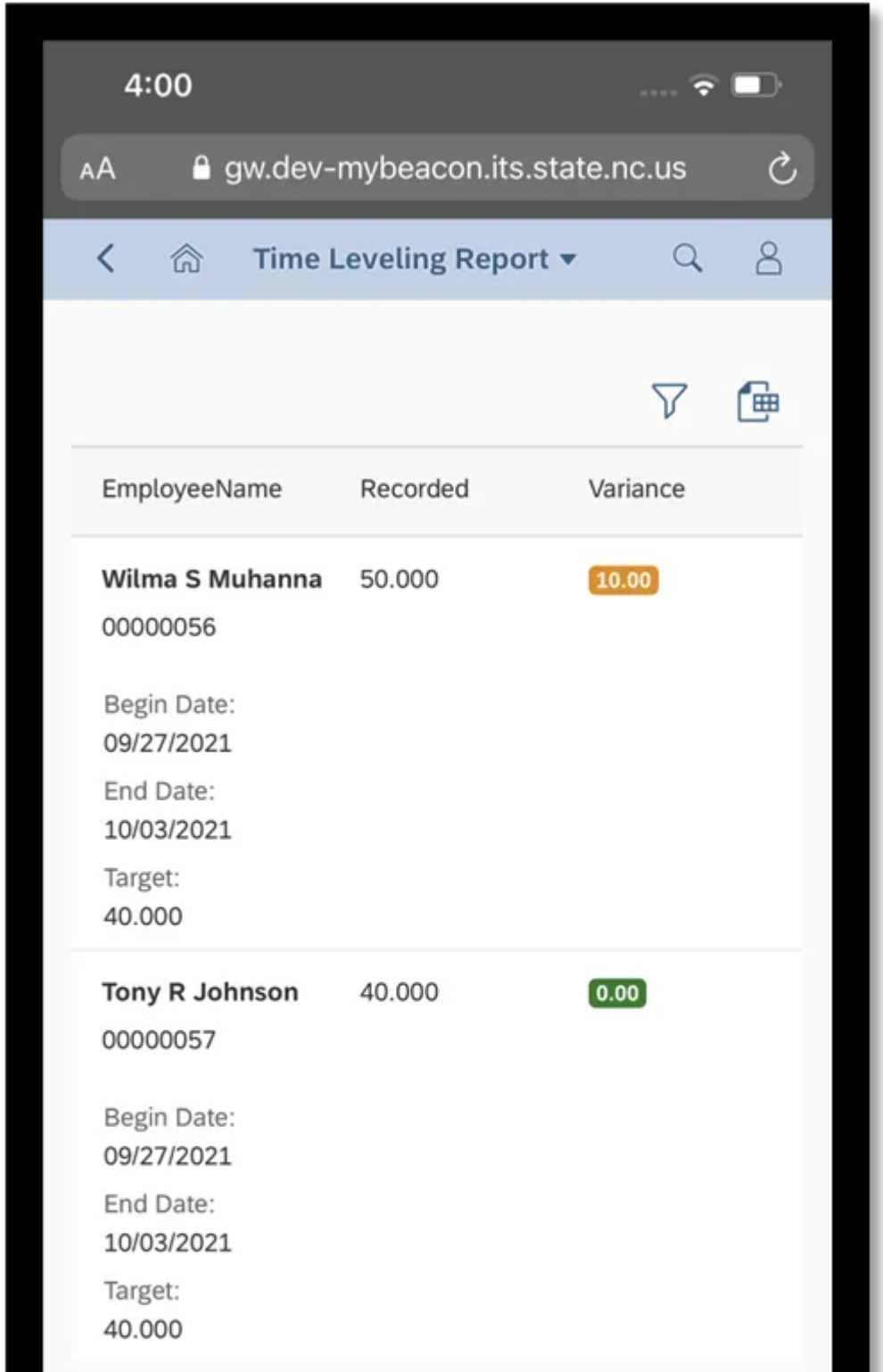
Date field selection for reporting on a period outside of the default current period.

Image


4:00
AA
gw.dev-mybeacon.its.state.nc.us
X
Employee Name:
Begin Date:
09/27/2021
End Date:
10/03/2021
Clear
Go

After **OK** is selected, the report is generated with the predefined Name filter and date selections chosen.

Image


4:00
AA
gw.dev-mybeacon.its.state.nc.us
Time Leveling Report
EmployeeName
Recorded
Variance
Wilma S Muhanna
50.000
10.00
00000056
Begin Date:
09/27/2021
End Date:
10/03/2021
Target:
40.000
Tony R Johnson
40.000
0.00
00000057
Begin Date:
09/27/2021
End Date:
10/03/2021
Target:
40.000

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