

# WFM Employee Manual

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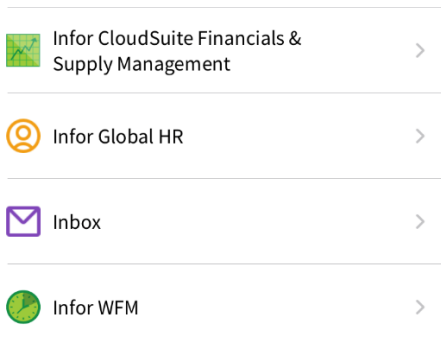
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# Navigating WFM

## Logging In to WFM with Infor Go App

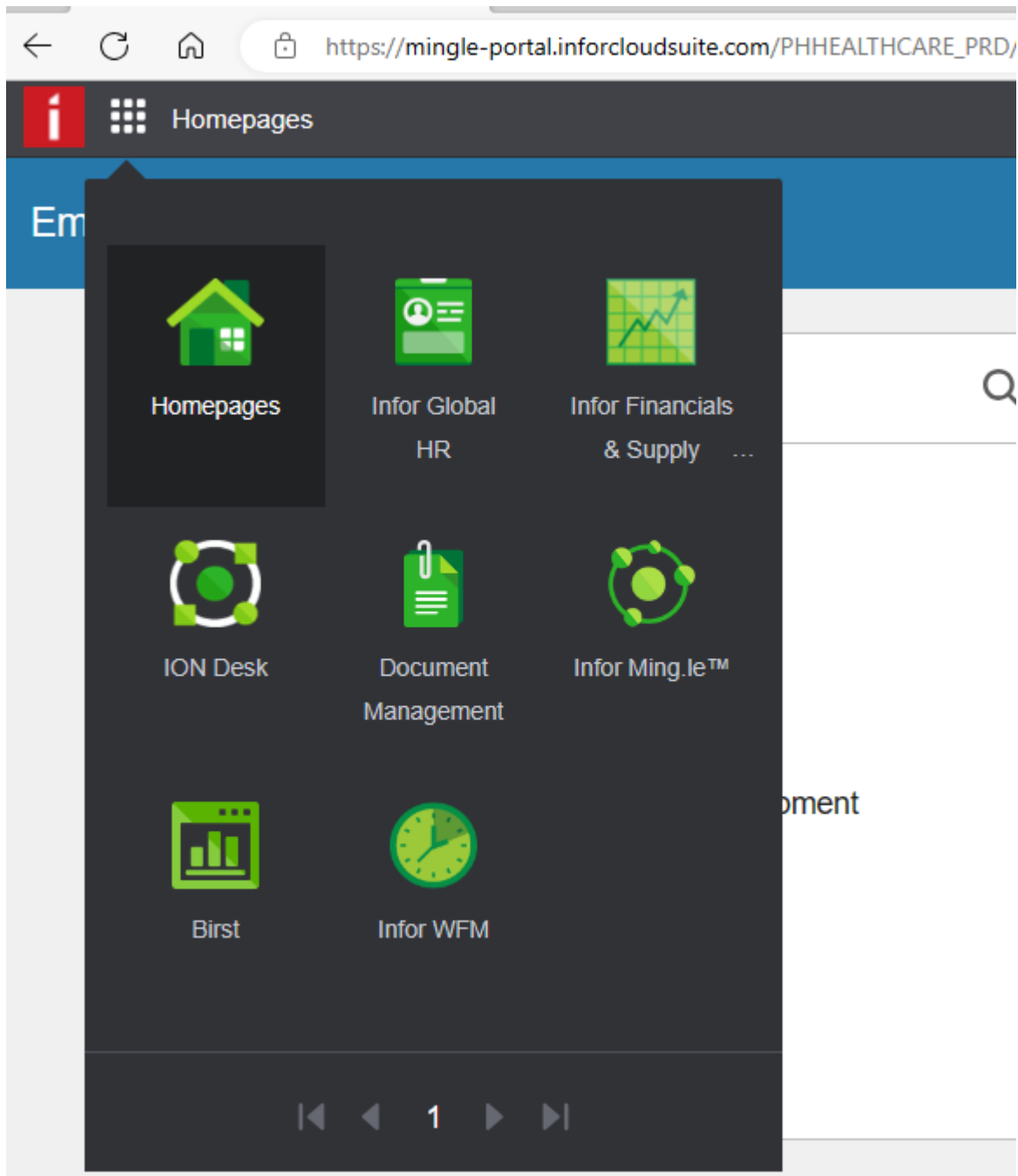
First consult the appropriate PHH documentation for installing Infor Go and connecting to your Infor Environment.

Once you are connected to the Infor Go application, select Infor WFM from the Infor application list on your Infor Go homepage.




## Logging In to WFM Desktop Application

After connecting to your PHH Infor Cloudsuite environment, click the application button on the upper left of your browser and select Infor WFM.



You will be taken to your Infor WFM Self Service Homepage

< > June 2023  Today

Mon	Tue	Wed	Thu
29	30	31	



### Navigating Self Service Portal

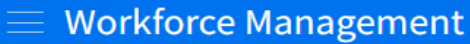
The Employee Portal is a self-service system that provides employees and supervisors with work-related information and a method for interacting with one another. WFM Employee Self service features are the same whether you have connected to Infor Go or the Desktop Application.

WFM Self Service allows employees view personal work-related details such as work schedules, clocks and schedule details. Staff can also select to work open shifts in both the Self Scheduler and Shift Billboard modules and request Shift Trades with other staff members. WFM Self Service also lets employees send and receive internal e-mail messages.







Your menu selection is the three tier lines on the top left.


Infor WFM

 Self Service Portal 



**Support, Workbrain**

-  Home
-  Messages
-  My Schedule Hub
-  Review Clocks
-  Request Time Off
-  Approve Time Off

< > June 2023  Today

Mon	Tue	Wed
29	30	
5	6	

## Self Service Portal Clock Functions

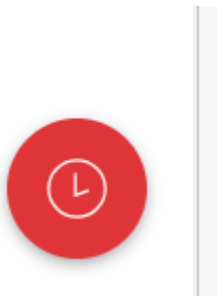
Your PHH Training and IS teams have put together a visual training aid on how to use the physical clocks. Please review the clock guide on your Internal site.

If necessary, for example when a physical clock is not available, and you are successfully logged onto the PHH network, you can access a web based Clock in the Self Service Portal. The clock is a floating icon in the bottom right of the screen.

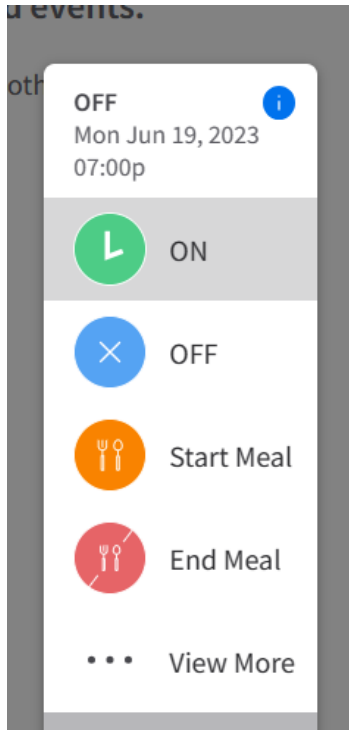
Employees can view their current clock status, and will be able to Clock ON and OFF, Start Meal, End Meal, Time Code Change, Job Change and Department Change.

### Clocking ON and OFF

Your current Clock status will be noted by the color of the clock widget. Green means you are clocked on and red means you are currently clocked off.



Click on the widget to view the primary options. Choose the ON, OFF, Start Meal, or End Meal as necessary. Your device must have location services turned on. You will be prompted to allow Location Services on your device if they are not already turned on. Without Location Services turned on you will not be able to use the WFM application clock.



## Other Clock Transactions

Clicking on View More options in the Clock Widget will allow you to enter other types of Clocks. Notably Job Change Clocks and Department Change clocks when necessary. These clocks are also treated as ON clocks, so you can start your day with a Department Clock, which will set your Department and clock you ON in one transaction

## Clock Options



**Change Job**

**Change Docket**

**Change Time Code**

**Change Department**

**Change Project**

---

**View Clock Transactions**



# Clock Review Request

WFM Self Service Portal has a module that allows employees to request missing clocks be added and/or existing clocks be removed from past work days.

## Submitting Adding Missing Clock


Access the Review Clocks module and navigate to the Month you would like to request missing clocks be added. Click on the day in question and hit Add New Clock.

The screenshot displays the 'Review Clocks' module in the WFM Self Service Portal. On the left is a navigation sidebar for Adam Jones (CNAI, CNAII) with options like Home, Messages, My Profile, My Schedule Hub, Review Clocks (selected), Self Scheduling, Request Time Off, Timesheet, and My Forms. The main area shows a calendar for June 2023 with the 16th of June highlighted as 'Today'. Below the calendar is a legend: Warnings (orange square), Scheduled (blue square), and Not Available (grey square). To the right, the 'Recorded Clocks' section is empty, showing a calendar icon and the text 'No Clocks' and 'There are no recorded clocks on this day'. At the bottom, there are two buttons: 'Add New Clock' and 'Submit All'. Below these buttons is a form for adding a new clock, showing 'MON 19 06:45a - 07:15p' and a vertical ellipsis menu icon.


Add the Time, Type and Reason for you clock and then hit Add.

## New Clock ×


Date <sup>\*</sup>


Time <sup>\*</sup>

Type <sup>\*</sup>

Reason <sup>\*</sup>

Comment

Add

When all of the missing clocks for the day have been added click the Submit All button to submit the request to your Supervisor.

**Review Clocks**

June 2023 Today < > Friday, Jun 16


S	M	T	W	T	F	S
28	29	30	31	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	29	30	1

■ Warnings 
 ■ Scheduled 
 ■ Not Available

MON  
**19**  
JUN

06:45a - 07:15p

**Recorded Clocks** Not scheduled



**No Clocks**

There are no recorded clocks on this day

**New Clocks**

7:00 a  
ON

⋮

Add New Clock
Submit All

## Submitting Delete Clock Request

Access the Review Clocks module and navigate to the Month you would like to request clocks be removed. Click on the work day in question and click Remove option for each clock you would like to request be removed.

**Review Clocks**

June 2023 Today < > Wednesday, Jun 14

S	M	T	W	T	F	S
28	29	30	31	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	29	30	1

■ Warnings 
 ■ Scheduled 
 ■ Not Available

MON  
**19**

06:45a - 07:15p

**Recorded Clocks** Scheduled [↗](#) ⋮

✓

9:30 a  
ON

Remove

✓

10:30 a  
OFF

Remove

Add New Clock
Submit All

Click the Submit All button when you have entered all of your Remove requests for the day. Add New Clock can be used in conjunction with Remove clocks to send one submission to your supervisor for the work day.

# Request Time Off

You can access the **Request Time Off** through the Self Service Portal Main Menu.

The screenshot displays the 'Request Time Off' interface in the Infor WFM Self Service Portal. The top navigation bar includes the Infor WFM logo, 'Self Service Portal', and a search bar. The left sidebar lists menu items: Home, Messages, My Schedule Hub, Review Clocks, Request Time Off (highlighted), and Approve Time Off. The main content area is divided into two calendar views. The top view shows June 2023 with days MON (29), TUE (30), WED (31), THU (1), FRI (2), and SAT. The bottom view shows May 2022 with days SUN (1), MON (2), TUE (3), WED (4), THU (5), FRI (6), and SAT (7). The May 2022 calendar includes a 'MEMORIAL DAY' on Monday, May 23rd, highlighted in light purple. A 'Balances' panel is visible on the right side of the May 2022 calendar, and a red circular icon with a clock symbol is located in the bottom right corner.

Balance information as of the current date is shown on the right-hand panel.

## Submitting Time Off Requests

By default, the current month is displayed, including a few days before and after the month. To change the month, select the month link and then select the month and year from the popup.

1. On the Time Off Calendar, click the day on which you want to request time off. The New Time Off window is displayed.
2. Specify this information:

### **TYPE**

Select the time off type that categorizes the time off that you are requesting.

The balances that are available for the selected time off type and the start date of the new request are displayed.

If a time off reason is required for the selected time off type, the required indicator (\*) is displayed in the **Reason** field. If a comment is required for the selected time off type, the required indicator is displayed in the **Comment** field.

### **Absence:**

Use this option to choose whether you are requesting a Full Day off or a Partial Day off. Partial Day off asks you to choose the start and end time of your Time Off Request for that day.

### **From**

Select the start of the date range that you are requesting.

### **To**

Select the end of the date range that you are requesting.

When entering a request for multiple days, "multi-day request" is displayed in lieu of schedule information.

### **Reason**

Select a reason that describes why you are requesting the time off, *if applicable*.

Not all time off types have associated time off reasons. If a Reason list is not provide then the Type is not configured to request a Reason. You may always specify a reason or additional information in the **Comment** field.

### **Comment**

Specify any additional comments.

### **Attachment**

Click **Choose File** to attach a supporting document to the request, if applicable. You can attach a PDF, DOC, DOCX, PNG, JPEG, or JPG file.

For example, when requesting time off for jury duty, you can include a copy of the summons with the request.

1. Click **OK**. The pending request icon is displayed on the calendar.

2. Specify additional requests before submitting all requests to your manager for approval. You can include both **multiple Types** within one request.
3. After your request is complete, click **Submit**. The request icon on the calendar changes from unsubmitted status to pending status.

When your request is approved, the calendar icon changes to a check mark.

## Canceling a Submitted Time Off Request

A request can be canceled after the request is submitted for approval. Days within a request that are not yet approved can be canceled without requiring approval from the manager.

1. On the Time Off Calendar, click the request icon. For multiple-day requests, you can click the request icon of any pending or approved day within the request.

The Cancel Time Off window displays the status of all days within the request, along with other relevant information.

2. Select the check box for each day within the request that you want to cancel. To cancel all days of the request, select the top-level check box.

**Note:** Days within the request that have been denied or are pending cancelation cannot be selected for cancelation.

3. Click **Cancel Selected**. The request icon is changed to the pending cancelation icon on the selected days.
4. Click **Submit** to submit the cancelation request. Days included in the cancelation request that are not yet approved by the manager are canceled immediately. The request icon is removed from those days on the calendar. The manager is sent a workmail that indicates the pending request has been withdrawn for those days.

If any days in the cancelation request were already approved, a cancelation request is sent to the manager for approval. When the manager approves the cancelation request, the request icon is removed from those days on the calendar. The employee is sent a workmail that indicates the cancelation was approved.

If the manager denies the cancelation request of one or more days, the request icon reverts to the **Approved** status on those days.

# View Timesheet – Self Service Portal Mode

Select Timesheet from the Main Menu.

Select My Timesheet

Use the Arrow Scroll bar to select different weeks.

Click an any Daily summary circle to view that day's work details.

The screenshot shows the Infor WFM Self Service Portal interface. The left sidebar contains navigation options: Home, Messages, My Schedule Hub, Review Clocks, Request Time Off, Approve Time Off, Timesheet (highlighted), and Proxy. The main content area is titled 'Timesheet' and has tabs for 'My Timesheet' and 'My Team'. A weekly summary row shows 'Support, Workbrain' with a green checkmark and a '12:00' circle for Mon 19, and '0:00' circles for Tue 20, Wed 21, and Thu 2. Below this, the date 'Mon Jun 19, 2023' is shown with a status 'Authorized by the system'. A 'Clocks' table lists two entries: 7:00a ON and 7:00p OFF. A 'Work Details' table shows a job on June 19, 2023, from 7:00a to 7:00p, with 12:00 hours and time code WRK.

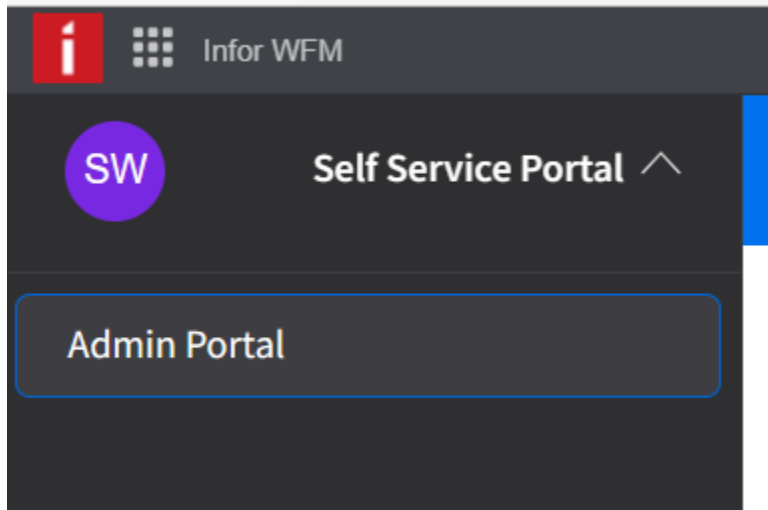
Time	Type	Data
7:00a	ON	
7:00p	OFF	

Start Time Date Job	Start Time	End Time	Hours	Time Code
June 19, 2023	7:00a	7:00p	12:00	WRK


## View Timesheet – Admin Mode


Select Self Service Portal from Main Menu and switch to Admin Mode.



Select My Timesheet from the Top Ribbon of the Admin Mode version.

Use the Arrow Scroll bar to select different weeks.

Click on the  of any day to view that day's details.

In the Details there is also an  that will open provide access to custom summary data popups that are not available in Self Service Portal mode.


A screenshot of the Infor WFM 'My Timesheet' interface. The top navigation bar includes 'My Timesheet' and 'Time Off Calendar'. Below this is a search bar for 'My Timesheet' and a 'Load' button. The main content area shows a table of work hours for the week of 06/19/2023 to 06/25/2023. The table has columns for 'Detail', 'Scheduled', 'Worked', 'Shift', 'Clocks', 'Time Code Summary', and 'Hour Type Summary'. The first row shows work on 06/19/2023 Mon, with 12.00 hours worked, an OFF shift, and a clock from 07:00a to 7:00p. Below this, a detailed table shows the start and end times, hours, rate, time code (WRK), hour type (REG), job (0), department (WORKBRAIN ROOT), and team (WORKBRAIN ROOT).




Start Time	End Time	Hours	Rate	Time Code	Hour Type	Job	Department	Team	Scheduled On Call	On Call 2	UDF 10
07:00	19:00	12.00		WRK	REG	0	WORKBRAIN ROOT	WORKBRAIN ROOT	<input type="checkbox"/>	<input type="checkbox"/>	*



Load

◀ 06/19/2023 - 06/25/2023

 Support, Workbrain

<input type="checkbox"/>	Detail	Scheduled	Worked	Shift	Clocks			
	06/19/2023 Mon	12.00	OFF	07:00a - 7:00p				
Start Time	End Time	Hours	Rate	Time Code	Hour Type	Job	Department	Team
	07:00	19:00	12.00	WRK	REG	0	WORKBRAIN ROOT	
								
Balances	Retro Adjustments	Clocks Pending	Clocks Rejected	Day Clocks Applied				

▶   06/20/2023 Tue OFF

# View Schedule

On your Home Page or the My Schedule Hub page, you will be able to see your Schedule summarized by Month.

Click on any day of the Month to view the Schedule Details for that Day.

Workforce Management

July 2023 Today						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30 06:00a - 06:30p	1 05:30a - 01:30p	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16

Saturday, Jul 01

[My Schedule](#) Co-Worker Billboard

05:30a - 01:30p

05:30a - 01:30p

Job

Team WORKBRAIN R

Department