Manager Dashboard User Manual



Manager User Guide

The Manager User Guide is designed to provide a supervisor or a manager with step-by-step instructions for their daily tasks.

Although every database will appear slightly different and every company will require managers to perform different tasks, the topics included in this user guide are those most commonly used.

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Manager Login

Logging into the System

1. Enter your assigned URL. You will see the login screen as seen below.

Client ID	
Login ID	
Password	
🗆 Remember Client ID	
🗆 Remember Login ID	
Login	
Forgot your password?	
Figure 1	

- 2. Enter in the company's Client ID.
- 3. Enter in your Login ID as given to you by your company.
- 4. Enter in your Password as given to you by your company.
- 5. Check the "Remember Client ID" box to have your Client ID automatically entered the next time you login from your current station.
- 6. Check the "Remember Login ID" box to have your Login ID automatically entered the next time you login from your current station.
- 7. Click the Login button.
 - a. The first time you attempt to login you will be prompted to change your password with the screen in Figure 2.

Your password Please create a new	has expired. password below.
Client ID	kims2
Login ID	123456789
Old Password	
New Password	
Confirm New Password	
Change Pa	ssword
change ru	5511014
Figur	e 2

- i. Enter your current password.
- ii. Enter a new password.
- iii. Enter the new password again.
- iv. Click the Change Password button.
- b. The first time you login you will see an overlay screen with hints for working within the system.



- Figure 3
- i. Click the Next arrow in the bottom right corner to see additional overlay screens.
- ii. Click Close to begin. The Information Overlay screen will appear.

Information Overlay	×
Display Information Overlay	
The information overlay will not be displayed in the future unless the box below is unchecked. The overlay can be re-enabled in your Preferences.	
Do not display the information overlay in the future.	
X Close	
Figure 4	

- 1. Keep the box unchecked to continue to see this overlay each time you login
- 2. Check the box if you do not want to see the overlay in the future.
- iii. Click the Close button.

Forgotten Password

1. Enter your assigned URL. You will see the login screen as seen below.

Client ID
Login ID
Password
Remember Client ID
🗆 Remember Login ID
Login
Forgot your password?

Figure 5

- 2. Enter in the company's Client ID.
- 3. Enter in your Login ID as given to you by your company.
- 4. Click on the "Forgot your password?" link.

Password Reset	x
Password Reset Form	
Enter your Client ID, Login ID and Email Address below. An email will be sent to the email address of file if all three fields match.	s
Client ID kims	
Login ID 234567890	
Email Address	
Cancel 🖌 Submit	
Figure 6	

- 5. Enter your email address.
- 6. Click the Submit button.

If you have a matching email address in the time system , then you will receive an email with the following message:

Hello,

We recently received a request to reset your password.

To complete the process please click on the link below

centralservers.com/Login.aspx?pr=VVFHTTBBPT07L3NW

If you do not wish to reset your password, ignore this message and it will expire in 60 minutes.

Thank you

Manager Dashboard

Toolbar

When you login to the system you will see the Manager Dashboard. The toolbar at the top of the screen remains the same as you toggle back and forth from the Employee and Manager Dashboards.

() Help	Search	 🍇 Jones, Kimberly	-
Issues or Feedback			
	Figure 7		

This section will describe the links within the toolbar: the Help link, the Issues or Feedback link, the Search function and the User Menu.

Help Link

The Help link will direct you to specific help documents, the Employee and Manager User Guide links and the Support Access function.

ip Doc	uments					
Manag	ger Docum	nents				Version: 3.3.3
Add a	nd Edit Emplo	oyees				-
Edit S	chedules					
Time	Cards & Pay A	djustm	nents			
Messa	ging					
Emplo	yee Groups					
Runni	ng Reports					
Time	Off Requests					
Excep	tions					
Emplo	yee Docu	ment	5			_
Web F	unching					
Subm	it Time Sheel	s				
Mobile						
Time	Off Requests					
Time	Card Approva	ls				
User (Suide					
Suppo	ort Access	2				-
Grant S	upport Techn	icians i	acess to	my login I	for the n	ext
	1 Hour	\$	2	Grant		
		[× ci	ose		

You may click on any link to see a detailed explanation of that Help topic.

Support Access Function

The Support Access function should be used when you would like the technical support team to view your database. By using this function they can see the screens as you see them, but they do it without the need of your password, thus providing more security for you.

Support Access
Grant Support Technicians acess to my login for the next
1 Hour 💠 🌄 Grant
X Close
Figure 9

Select the number of hours you permit them to access your database and then click the Grant button.

NOTE: Typically you would be on the phone with someone from technical support and they would ask you do perform this action.

Issues or Feedback Link

This tool is designed to connect you to technical support by email. Once they receive your message they will contact you in the order in which it was received.

Sending an Issue or Feedback

1. Click on the Issues or Feedback link.

les or Feed	lback
Kimberly	
Jones	
kimberly_jone	es@xyzcompany.com
I am having di	ifficulty with generating an updated schedule
	h

Figure 10

Your name and email will fill in automatically.

- 2. Enter your message.
- 3. Click Send. You will see a confirmation box.

Success	×
Your issue report has been submitted. A support representative will respond to your request shortly.	
	Ok
Figure 11	

4. Click the Ok button.

Search Feature

This searching tool is a quick way to pull up an employee's profile when you enter their name or employee number. It will also search for a string of letters you enter and only display those employees with that string in their name.



User Menu

When you click on the down arrow by your name you will see 4 parts to the User Menu: The Employee Dashboard, The Manager Dashboard, Change Password and Logout. Each of these will be described in the following section.



Employee Dashboard Button

The Employee Dashboard is designed to give you an overview of **your time** at work. It is broken down into 7 sections: The Actions Bar, Actions, Schedules, Time Off, Messages, your Time Card and Reports.

Click on the Employee Dashboard icon 🎽 to go to your personal dashboard.



Figure 14

For specifics about navigating the Employee Dashboard please see the "User Guide" under Employees in the Help Menu.

Manager Dashboard Button

The Manager Dashboard is a management tool for you to view, edit and manage your employees' time. It is broken down into 6 screens: Home, Employees, Time Cards, Schedules, Time Off and Reports.

Click on the Manager Dashboard icon ⁴⁵⁵ to go to your management dashboard.

Home Er	nployee	s T	ime (Cards	Scheo	lules	Time O	ff I	Report
Status Board			÷						> <
ne 🔺	Absent	Out	In	Meal	Break	Last T	Fransaction	Notes	
Kimberly		2							
Train, Admin		2							
_Train, Employee		7							
rain, Manager		1							
otal Records: 4		_	Out	: 100%,	, In: 0%,	Meal: 09	%, Break: 0%		_
Cha	art Wiza	rd		×					
Create	Custom	Chart	-						
create	Custom (5						
	m								
	0								
7	5	·							
							Fig	ure 1	5

NOTE: Your screen may not look exactly like this depending on your company's configurations.

The Manager Dashboard will be explained in detail in the following pages of this user guide.

Change Password Link

Keeping your password safe and secure is important within any system. This link allows you to change your password.

1. Click on the Change Password link.

Change Password	
Old Password:	
New Password:	
Confirm New Password:	
🕞 Cancel 📊 Save	
Figure 16	

- 2. Enter in your old password.
- 3. Enter in your new password.
- 4. Enter in your new password again.
- 5. Click on the Save button. You will see a confirmation box.



5. Click the Ok button.

Logout Link

For security reasons it is important to always log out of the system when you are finished working. This link will log you out of the system. Once you are logged out you will be taken back to the login screen as seen in Figure 1.

Manager Dashboard Screens

There are 6 screens (or sections), which a manager can access through the Manager Dashboard: Home, Employee, Time Cards, Schedules, Time Off and Reports.

Home	Employees	Time Cards	Schedules	Time Off	Reports
		Figu	re 18		

Each of these screens gives the manager access to information about the employees they manage. These are all described in detail in the pages to follow.

Manager Action Icons

The Manager Action Icons are a constant on every tab. They are quick access icons used to alert you of occurrences for some of the most commonly used management tools.



Figure 19

The 5 icons are: Missing Punches, Exceptions, Alerts, Time Off Requests and Messages. Each of these will be explained in this section.

If there are occurrences for any of the icons, you will see a number in the upper right corner for that icon. The number shown will signify how many occurrences exist for each.



Missing Punch

The Missing Punch icon will show you a list of all of the Missing Punches that have occurred within your group. It is best to view this screen daily to make corrections. Missing punches will accrue until they are corrected.

Understanding the Missing Punches Screen

The Missing Punch screen will appear when you click on the icon. The details of the screen are explained below.

	Month »	08/01/2014	- 09/30/2014	*	Week	()	•
E#	Name	Missing Type	Date	Add Type	Date	Time	۶
57567567	James, Nolan	Clock In	09/04/2014	Clock In	09/04/2014	09:00 AM	
78678678	Johnson, Nora	Clock Out	09/02/2014	Clock Out	09/02/2014	05:00 PM	
78678678	Johnson, Nora	Clock Out	09/03/2014	Clock Out	09/03/2014	05:00 PM	
12345678	Pierce, Edwin	Clock In	09/05/2014	Clock In	09/05/2014	08:30 AM	
78912345	Rosen, Annabel	Clock Out	09/02/2014	Clock Out	09/02/2014	05:00 PM	
56456456	Young, Lauren	Clock Out	09/02/2014	Clock Out	09/02/2014	04:30 PM	

Figure 21

Navigating Dates: Select the date range you would like to include in this view.

- Click on the Month button to see an entire month's worth of Missing Punches. You can move to other months by using the arrow buttons to the left and right of the Month button.
- Enter in user-defined dates.
- Click on the Week button to see an entire week's worth of Missing Punches. You can move to other weeks by using the arrow buttons to the left and right of the Week button.

EE #	The unique identifier for the employee with the
	missing punch.
Name	The name of the employee with the missing punch.
Missing Type	The type of punch that is missing.
Date	The date of the missing punch.
Add Type	The suggested type of punch to add to correct the
	shift.
Date	The suggested date for the missing punch.
Time	The suggested time for the missing punch.
Missing Punch	Using this button will automatically correct the punch
Fix button	with the suggested Add Type, Date and Time.
Total Records	The total number of missing punches for the date
	range selected.

Correcting the Missing Punch

There are two options to complete the shift: Click on the Missing Punch Fix button 🐱 to automatically fix the shift by the system default or click on the punch you wish to complete and manually correct it.

If you use the Fix button, the missing punch associated with that line will disappear.

To manually correct the punch, follow the steps listed below.

1. Click on the punch you wish to enter. The expanded view will be available.

EE#	Name	Missing Type	Date	Add Type	Date	Time	۶
567567567	James, Nolan	Clock In	09/04/2014	Clock In	09/04/2014	09:00 AM	
In Clock In (Missing Cloc	\$ Clock 09/04/2014 09:00 AM (09/04/2014) 09:00 AM	Out 09/04/2014) (4/2014 06:00 PM)	06:00 PM				
Labor Lev	rels						
					Cance		pply
678678678	Johnson, Nora	Clock Out	09/02/2014	Clock Out	09/02/2014	05:00 PM	
678678678	Johnson, Nora	Clock Out	09/03/2014	Clock Out	09/03/2014	05:00 PM	
912345678	Pierce, Edwin	Clock In	09/05/2014	Clock In	09/05/2014	08:30 AM	
678912345	Rosen, Annabel	Clock Out	09/02/2014	Clock Out	09/02/2014	05:00 PM	
456456456	Young, Lauren	Clock Out	09/02/2014	Clock Out	09/02/2014	04:30 PM	



The missing punch will be noted in red letters

- 2. Enter the correct punch type.
- 3. Enter the correct date.
- 4. Enter the correct time.
- 5. Enter/View additional information as needed.
 - a. The first box will show if the punch was approved. If it was approved, it will have a check in the box. If it is unapproved, it will be blank. Check the first box to approve the punch.
 - b. The second box will show if the employee had approved the punch. If it was approved, it will have a check in the box. If it is unapproved, it will be blank.
 - c. The notepaper icon allows you to enter in any manager notes.



- d. Click on the paper and pencil icon to view the Audit Trails.
- 6. Expand and complete the Labor Levels as needed.
- 7. Click the Apply button to save the correction.

Exceptions

The Exceptions icon is will show you a list of all of the Exceptions that have occurred within your group. The exceptions shown under this icon were defined in the configurations set up by your administrator. It is best to view this screen daily to make corrections. Missing punches will accrue until they are corrected.

Understanding the Exceptions Screen

The Exceptions screen will appear when you click on the icon. The details of the screen are explained below.

				Maala		49
*	Month	*	08/01/2014 - 09/30/2014 «	Week	*	
EE#	Name	Date	Exception Type	Acknowledge	Edit	۶
901901901	Dyde, Doug	09/01/2014	ABS - Clock In: 08:00 AM		P	
789789789	Hernandez, Gustavo	09/02/2014	LI - Clock In: 08:45 AM		P	
789789789	Hernandez, Gustavo	09/02/2014	LO - Clock Out: 05:45 PM		1	
567567567	James, Nolan	08/21/2014	ABS - Clock In: 08:00 AM		0	
567567567	James, Nolan	09/02/2014	EO - Clock Out: 04:30 PM		1	
567567567	James, Nolan	09/04/2014	LI - Clock In: 09:00 AM		1	
567567567	James, Nolan	09/04/2014	LO - Clock Out: 06:00 PM		0	
345678912	Paul, Peter	09/02/2014	EO - Clock Out: 04:30 PM		1	
912345678	Pierce, Edwin	09/05/2014	LO - Clock Out: 05:35 PM		/	
456456456	Young, Lauren	09/02/2014	EI - Clock In: 07:25 AM		1	
				т	otal Record	ls: 1

Configuration button : A tool used to sort the view of exceptions to your preference.

Navigating Dates: Select the date range you would like to include in this view.

- Click on the Month button to see an entire month's worth of Exceptions. You can move to other months by using the arrow buttons to the left and right of the Month button.
- Enter in user-defined dates.
- Click on the Week button to see an entire week's worth of Exceptions. You can move to other weeks by using the arrow buttons to the left and right of the Week button.

EE#	The unique identifier for the employee with the exception.
Name	The name of the employee with the exception.
Date	The date the exception occurred.
Exception Type	The exception code, the punch type and the time.
Acknowledge	A checkbox used to track that the exception was
	seen.
Edit button	A link to the Timecard screen so you can edit the
	punch.
Filter button	A tool to filter employees to show only a specific
	group.
Total Records	The total number of exceptions for the date range
	selected.

Configuring the Exceptions Screen

Each manager is different in how they manage their employees. The configuration of the exceptions screen allows a manager to prioritize the exceptions by how they appear.

Follow the steps below to change the order of the exceptions.

1. Click on the gear button. The Configuration screen will appear.



Figure 25

- Check the "Hide Acknowledged Exceptions" to hide exceptions as they are reviewed. Uncheck this item if you would like to view the exceptions even after acknowledgement.
- 3. Set the priority by using the up and down arrows on the right.
 - a. Select an exception name.
 - b. Move the arrows to position the exception in the ranking where you would like it to be.
- 4. Repeat Step 3 as necessary.
- 5. Click the Save button.

Acknowledging the Exception

Checking the Acknowledge box corresponding to a given exception will be tracked in the audit trails and show that you were aware of the exception. Once an exception is acknowledged it will show as acknowledged on the employee's timecard as seen below.

	Tuesda	y	0	9/02/2014 (Acknowledge	ed Exception)						
▼												
		Δ		Clock In	08:45 AM	6000/200/210	Begin Meal	12:00 PM		3.25		
				Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00 🔎
	0	Δ		Work	01:00 PM	6000/200/210	Clock Out	05:45 PM		4.75		
			•						Total:	8.00	0.00	1.00



Editing the Exception

The timecard may be corrected if an exception is not acceptable and/or does not follow your company's policy.

To manually correct the exception, follow the steps listed below.

1. Click on the edit button
 corresponding to the exception you wish to edit
 as shown in Figure 24. The system will open up the Timecard screen. Look
 at your specific day.

	Tuesday	09/02/2014								
▶	Δ	Clock In	08:45 AM	6000/200/210	Clock Out	05:45 PM	Total:	8.50	0.00	0.50
				Figur	e 27					

The exception will show with the same yellow triangle icon symbol.

- 2. Click anywhere on that line to see an expanded view if you are not already looking at the expanded view.
- 3. Edit the punch as needed.

Alerts

The Alerts icon \mathbf{N}^2 will show you a list of all of the Alerts that have occurred within your group. The alerts shown under this icon were defined in the configurations set up by your administrator.

Understanding the Alerts Screen

The Alerts screen will appear when you click on the icon. The details of the screen are explained below.

Alerts							>
**	Month	» 08/0	1/2014 - 09/30/2014	*	Week	»	
EE#	Name	Date Time	Alert				۶
345678912	Paul, Peter	09/02/2014 05:16 PM	30 minutes extra: Worked of 9 on 09/02/2014	30 minutes more	than the schedul	ed hours	×
901901901	Dyde, Doug	09/03/2014 12:01 PM	Employee Start Date: 09/0	06/2006			×
		2	¢ Close			Total Re	cords: 2
			Figure 28				

Navigating Dates: Select the date range you would like to include in this view.

- Click on the Month button to see an entire month's worth of Alerts. You can move to other months by using the arrow buttons to the left and right of the Month button.
- Enter in user-defined dates.
- Click on the Week button to see an entire week's worth of Alerts. You can move to other weeks by using the arrow buttons to the left and right of the Week button.

EE#	The unique identifier for the employee with the
	alert.
Name	The name of the employee with the alert.
Date	The date the alert occurred.
Alert	The detail of the alert.
Delete button	Used to clear the alert from the screen.
Filter button	A tool to filter employees to show only a specific
	group.
Total	The total number of alerts for the date range
Records	selected.

Time Off Request Icon

The Time Off Request icon will show you how many requests for time off have been submitted and which are still outstanding – meaning they need to be approved or denied. Clicking on this icon will take you to the Time Off page where you can review these requests. See the Time Off Requests section for details about this screen.



Messages

The Messages icon will show you how many messages you have from your employees. These messages are sent from the Employee Dashboard Messages screen.

Viewing the Messages

1. Click on the icon to view the message(s).

Messages		×
	🖄 Create New Message	View Past Welcome Messages
Order: Newest Show: Inbox Gassud, Jennifer 09/21/2014 Drs Appt James, Nolan 05/17/2014 Drs appt	Reply Forward Mark as Unread From: Gassud, Jennifer Drs Appt Drs Appt Hi Kimberly, Do I need to take PTO for a scheduled Drs Appt or would I be able to shift? Thanks Jennifer	Delete 08:42 PM - 09/21/2014 to make up the hours before or after my
*Note: Messages older than 90 days will be auto	matically deleted.	

Figure 30

The new and saved messages will appear on the left-hand side of the screen. New messages will show an icon with a sealed envelope. Previously viewed messages will show an icon with an opened envelope.

You may filter which messages should appear by the "Order By:" Newest, Oldest or By Sender and the "Show:" Inbox, Sent or All.

- 2. Click on the message you want to view.
 - a. To delete this message, click the Delete button.
 - b. To reply to this message:
 - i. Click the Reply button.
 - ii. Enter your message.
 - iii. Click the Send button.
 - c. To forward this message:
 - i. Click the Forward button.
 - ii. Select the employee to whom the message should forward.
 - iii. Enter in an expiration date.
 - iv. Enter your message.
 - v. Click the Send button.
 - d. To make this message appear as a new unopened message, click on the Mark as Unread button. You will see the opened envelope change into a sealed envelope.
- 3. To see previously viewed Welcome Messages, click on the "View Past Welcome Messages" button.

Creating Messages

- 1. Click on the Messaging icon.
- 2. Click on Create New Message button. The New Message screen will appear.



3. Select which employee(s) should be sent this message.

NOTE: The available employees will be any employee(s) you manage.

- 4. Enter in the expiration date.
- 5. Enter in the Subject line for the message.
- 6. Enter in the text for the message.
- 7. Click the Send button.

Home Screen

The Home screen of the Manager Dashboard is designed to be an overview of a manager's group. It is comprised of 2 main sections. The first is the Management Tool Board, which is made up of 3 boards: The Status Board, The Missing Punches - Exceptions board and the Summary Widget board. The second section is made up of 2 boards: The Transaction Log and the Summary board.

Home Emp	loyees	Tim	e Caro	is S	Schedules Tir	ne Off	Reports	
Status Board		•				> @	Transaction Log	2
Name 🔺	Absent	Out	In	Meal	Last Transaction	Notes	Date / Time	Employee
Brown, Shanna	2				08/15/14 03:00 AM		09/25/14 07:18 AM	Franks, Jason
Franks, Jason		2			09/26/14 04:00 PM		09/25/14 07:17 AM	Franks, Jason
Green, Russ			2		11/26/14 08:00 AM		09/17/14 11:02 AM	Sacramento, Robert
Henkel, Tommy		۶			07/07/14 12:00 PM		09/16/14 10:19 AM	Roman, Sarah
Lopez, Paula			۶		11/26/14 08:00 AM		09/16/14 09:52 AM	Franks, Jason
Roman, Sarah	2				09/16/14 10:19 AM		09/11/14 10:06 PM	Franks, Jason
Sacramento, Robert	2				09/19/14 04:30 PM		09/11/14 10:41 AM	Franks, Jason
Smith, Oliver			2		11/26/14 08:00 AM		09/11/14 10:35 AM	Franks, Jason
Stanley, Larry	2				08/25/14 04:00 PM		09/11/14 08:57 AM	Franks, Jason
							09/05/14 08:49 AM	Sacramento, Robert
							09/05/14 08:25 AM	Sacramento, Robert
							•	•
							Type Legend:	
4			_			•	CI = Clock In CO = C	lock Out TR = Transfer SG =
Total Records: 9		Out:	22%, I	(n: 33%	%, Meal: 0%		BB = Begin Break EB = E BM = Begin Meal EM = E	nd Break Swipe And Go nd Meal



The Management Tool Board

The Management Tool Board, it is made up of 3 boards: The Status Board, The Missing Punches – Exceptions board and the Summary Widget board. You are able to navigate between boards, filter employees and configure the screen from the toolbar.

Navigating Boards

You may change the board currently in view by clicking on the down arrow next to the name of the board currently in view. Your choices are Status Board, Missing Punches – Exceptions and Summary Widget.

Status Board 🚽	Show all employees				>	i
Status Board	n Meal	Break	Last Transaction	Notes		Exc
Summary Widget			10/10/14 04:00 PM			
	Figur					



Filtering Employees

The Filtering screen allows you use specified criteria to only show a select group of employees in the Status Board. The following applies to any other place in the system that has the Employee Filter icon

Filtering by Names

The blank space next to the Apply button allows you to enter in any letters to help you filter your employees. It will search for the string of letters you enter and only display those employees with that string in their name.

For example, if you entered in "John" you would show only those employees with "John" in their name. You might show John Smith, Tim Johns and Elizabeth Johnson because all three of them have "John" somewhere in their name. However, if you were more specific and entered "Johnson," then only Elizabeth Johnson would appear in your list.

Follow these steps to filter by name.

 Click on the Filter icon not be top right corner of the Management Tool Board.

Filters	×
	Apply
🔊 Clear Filter	
🖶 Create New	
Figure 34	

- 2. Enter in the string of letters you wish to use as your filter.
- 3. Click Apply. Only those names with that string will appear in your Management Tool Board.

Clearing the Filter

Clearing the Filter will allow you to quickly remove the existing filter to see a complete list of the employees you supervise.

 Click on the Filter icon not be top right corner of the Management Tool Board.

Filters	×
	Apply
🔊 Clear Filter	
🖶 Create New	
Figure 35	

2. Click the Clear Filter button.

Show All Employees with the Filter

You are able to toggle back and forth from all of your employees to the employees shown when using a filter by selecting the "Show all employees" box.

Status Board	\$	Show all employees	2	٩
	F	Figure 36		

Manager Dashboard 23

You will notice that if a filter is being used, the filter button will have a checkmark next to it.

If you deselect the "Show all employees" box, the filter will be reapplied.

Creating a New Filter

1. Click on the Filter icon not the top right corner of the Status Board section. The Filters screen will appear.



2. Click on Create New icon 🕈 to create a brand new filter. The Employee Filters screen will appear.

🕂 Fields 🍋 Ope	n 🕞 Save	Save As		
Number - 👂	Last Name 👂	First Name	Badge Number	Employee Status
123123123	Chip	Lori		Active
234234234	Gassud	Jennifer		Active
245364788	Chide	Bob		Active
345678912	Paul	Peter		Active
456456456	Young	Lauren		Active
567567567	James	Nolan		Active
678678678	Johnson	Nora		Active
678912345	Rosen	Annabel		Active
789789789	Hernandez	Gustavo		Active
891234567	Tyson	Rosalinda		Active
901901901	Dyde	Doug		Active
Total Records: 12				
901901901 Fotal Records: 12	Dyde	Rosalinda Doug	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Active

3. Click on the Add a Field button Fields... The Choose Fields screen will appear.

Unselected:	Selected:	
Address 1 Address 2 City Email Middle Name Phone 1 Phone 2 Phone 3 Postal Code Start Date	Number Last Name First Name Badge Number Employee Statu	is
	🔊 Cancel 🔒 Save	

- Figure 39
- 4. To add columns (or filters) double-click on items in the "Unselected" box to move them into the "Selected" box.

NOTE: You may also click on the item you wish to move into the "Selected" box by clicking once on the column title and then click on the right-facing arrow

5. To remove existing columns double-click on that title in the "Selected" box to move it into the "Unselected" box.

NOTE: You may also click on the item you wish to move into the "Unselected" box by clicking once on the column title and then click on the left-facing arrow \leftarrow .

Below is an example of how the screen would look to filter by last name only.

Unselected:		Selected:	
Address 1 Badge Number City Email Employee Status First Name Middle Name Number Phone 1	*		1
	Cancel	Save	

6. Click the Save button when all of the columns you wish to view appear in the "Selected" box. Those will now be in view.

NOTE: In this example only one filter was chosen. You may choose as many as you would like.

mployee Filter			
Fields 🕞 Open 🕞 Save	Save As	Search	
Last Name A			۶
	Chide		
	Chip		
	Dyde		
	Gassud		
	Hernandez		
	James		
	Johnson		
	Paul		
	Pierce		
	Rosen		
	Tyson		
Total Records: 12			
		d Clear 8 Apply	Close
		S clear	Ciose

Figure 41

7. In this example, to filter within the "Last Name," click on Filter button corresponding to the "Last Name," which appears in the right-hand corner.

Last Name Filter	×
Only include:	
🗹 А-Н	
🗆 I-P	
🗆 Q-Z	
Last Name Containing 🛟	
Clear Apply	
Use or to separate multiple values Example: 11 or 22 will search for 11 or 22	
Figure 42	

NOTE: Each filter criteria will look different because each filter will have its

own specific filter screen.8. Click the Apply button. In this example only the employees with last names beginning with A-H will be in view.

	Open	Save	Save As		Search	
Last Name 🔺						Я
			Ch	ide		
			C	nip		
			Dy	de		
			Gas	sud		
			Hern	andez		

Figure 43

- 9. Click the Save As button save this filter.
- 10. Enter in the name of this new filter (i.e. Last Names A-H)



- 11. Check the box if you would like to share this filter with others.
- 12. Click the Save button.

Selecting a Filter

1. Click on the Filter icon on the top right corner of the Status Board section. The Filters screen will appear.

Filters	×
[Apply
EST	
Last Names A-H 🖋	
🔊 Clear Filter	
🕂 Create New	
Figure 45	

NOTE: The filter currently being used will have a green checkmark next to it.

2. Click on another previously saved filter to use it. It will automatically update the list in the board.

Changing the Configurations

You may change the way your boards display information by changing the columns to be viewed.

1. Click on the Gear is on the top right corner of the Management Tool Board toolbar. The Configuration Screen will appear.

Configuration			×					
Select the columns to display on the status board								
Display approaching weekly OT hours only if it is less than hours								
Unselected		Selected						
Exception Hours Worked Hours Scheduled Hours Variance Meal Penalty Scheduled Clock In Scheduled Clock Out Weekly Hours Pay Period Hours Approaching OT	11 小	Absent Out In Meal Break Last Transaction Notes	•					
Cancel		Save						

The items currently being viewed will appear under the "Selected" box.

2. Double-click on items in the "Unselected" box to move them into the "Selected" box.

NOTE: You may also click on the item you wish to move into the "Selected" box by clicking once on the column title and then click on the right-facing arrow .

3. To remove existing columns double-click on that title in the "Selected" box to move it into the "Unselected" box.

NOTE: You may also click on the item you wish to move into the "Unselected" box by clicking once on the column title and then click on the left-facing arrow \Leftarrow .

4. If you choose "Approaching OT" as one of your "Selected" items you must complete the OT section of the configuration screen as seen below.

Display approaching weekly OT hours only if it is less than

10 hours

Figure 47

Enter the number of hours.

5. Click the Save button.

Status Board

The Status Board is a management tool used to show you a snapshot of the status of your employee group at any given moment. Although the system administrator controls the employees shown in your Status Board, you are able to configure the columns to suit your needs. The Status Board shown in Figure 48 is shown with the default settings.

						> 9
Absent	Out	In	Meal	Break	Last Transaction	Notes
		2			05/09/14 08:00 AM	
2						
		2			05/09/14 08:00 AM	
				2	05/09/14 09:35 AM	KJ approved
		2			05/09/14 09:31 AM	
		۶			05/09/14 09:31 AM	
		2			05/09/14 08:00 AM	
	2				05/09/14 09:17 AM	
				۶	05/09/14 09:33 AM	
		2			05/09/14 08:00 AM	
		2		-	05/09/14 08:00 AM	
			2		05/09/14 09:15 AM	
		2			05/09/14 08:00 AM	
		9			OF /00 /14 08:00 AM	
		Out:	19%, In	1: 62%, M	leal: 5%, Break: 10%	
	¢				P P P <td>Image: Constraint of the second se</td>	Image: Constraint of the second se

Missing Punches – Exceptions Screen

The Missing Punches – Exceptions Screen is a management tool used to show you a snapshot of any missing punches or exceptions from your employees' time cards. The list given will link you to the time card, which needs to be acknowledged or corrected. An example is shown below.

NOTE: If the Missing Punches – Exceptions Screen is not in view, click on the dropdown arrow to select it from the list.

	Number	Namo	Date -	Тура	Acknowl	Edit
_	Number	Name	Date	Туре	ACKHOWI	Eult
2	245364788	Chide, Bob	05/13/2014	ABS - Clock In: 08:00 AM		1
	234234234	Gassud, Jennifer	05/12/2014	Missing Punch - Clock In		P
	345678912	Paul, Peter	05/09/2014	Missing Punch - Clock Out		Ø
D	789789789	Hernandez, Gustavo	05/09/2014	Missing Punch - Clock Out		Þ
	678678678	Johnson, Nora	05/09/2014	Missing Punch - End Break		0
Δ	123123123	Chip, Lori	05/09/2014	ABS - Clock In: 08:00 AM	0	0



NOTE: The items listed on this screen should match the Missing Punch and Exceptions icons shown on the toolbar as seen in Figure 50. As items are acknowledged and corrected from either screen it will update the other.



Acknowledging an Exception

1. Highlight the item you wish to acknowledge or accept.

Number	Name	Date 👻	Туре	Acknowl	Edit
245364788	Chide, Bob	05/13/2014	ABS - Clock In: 08:00 AM		1
		Fig	ure 51		

2. Check on the small white box underneath the Acknowledge heading. It will be removed from the list.

Editing an Exception

1. Highlight the item you wish to edit.

123123123	Chip, Lori	05/09/2014 ABS - Clock In: 08:00 AM	1
		Figure 52	

- 2. Click on the corresponding pencil icon \checkmark to edit the occurrence. You will be linked to the Time Card entry for that individual.
- 3. See the Time Card Screen for specifics about what you would like to do.

Editing a Missing Punch

1. Highlight the item you wish to edit.

2	34234234	Gassud, Jennifer	05/12/2014 Missing Punch - Clock In	0
			Figure 53	

- 2. Click on the corresponding pencil icon \checkmark to edit the occurrence. You will be linked to the Time Card entry for that individual.
- 3. See the Time Card Screen for specifics about what you would like to do.

Summary Widget Screen

The Summary Widget screen is a management tool used to show you a snapshot of the hours worked within your group. It shows the daily totals for scheduled hours, actual hours, OT hours and missing punches, and then at the bottom of the screen it shows the totals for the selected week. An example and an explanation of the rows are shown below.

Summary Widge	et	Ŷ					>
Veekly						T	oday 🕨
	Sun 05/11	Mon 05/12	Tue 05/13	Wed 05/14	Thu 05/15	Fri 05/16	Sat 05/17
Scheduled Hours	0	108.00	108.00	108.00	108.00	108.00	0
Actual Hours	0	85.25	109.25	8.00	0	0	0
OT Hours	0	0	0	0	0	0	0
Missing Punches	0	2	0	1	0	0	0
Missing Punches	0 Sch Act	2 neduled Hor rual Hours	UITS	1 540. 202.	00050	0	0

Figure 54

Navigating Weeks

Use the Summary Widget screen toolbar to navigate from one week to another.

Weekly	•	Today	8	
Figure 55				

- Click on the left arrow in the toolbar to navigate to previous weeks.
- Click on the right arrow in the toolbar to navigate to future weeks.
- Click on the Today button to view the current week.
- Click the refresh button to show the most current data.

Schedule Hours	The total number of hours scheduled for your				
	group.				
Actual Hours	The total number of paid hours for your group.				
OT Hours	The total number of overtime hours worked for				
	your group.				
Missing Punches	The total number of missing punches for your				
_	group.				

Employee Screen

The Employee Screen stores all relevant data for an employee's profile. As a manager, you will only have access to employees you manage. This screen is made up of two sections: the Employee List and the Employee Profile. The Employee Profile will show the details of the employee selected or highlighted from the employee list.

Hom	e E	mployees	Ti	me Cards	Schedules	Time Off	Reports		
EE#	Last 🔺	First	» «	Employee	Profile				
245364788	Chide	Bob		S 24526	4799 - Chido	Pob			4 4
123123123	Chip	Lori		24330	4788 - Cilide,	BOD			~ ~
901901901	Dyde	Doug		All				Information	
234234234	Gassud	Jennifer		Profile					1
789789789	Hernandez	Gustavo		Tronic					
567567567	James	Nolan		Employe	e #:		Badge #:	🖉 Status:	
678678678	Johnson	Nora		2453647	88		55432	Active	
345678912	Paul	Peter		First Na	me:		Middle Name:	Last Name:	
912345678	Pierce	Edwin		Bob			т	Chide	
678912345	Rosen	Annabel		Title:			Start Date:		
891234567	Tyson	Rosalinda		Line Ana	llyst		08/14/2006		
456456456	Young	Lauren		Manage	r:		Time Zone:		
				9123456	78 - Pierce, Edwir	n	(GMT-05:00) Eastern Ti	"ime (US & C	
				Contacts					
				Address	1:		Email:	Alert Email:	L. L
				345 1st	Street		bchide@yahoo.com		
				Address	2:		Phone 1:		
							412-555-2343		
				City:			Phone 2:		4
				Pittsburg	gh		412-963-5309		
							Figure 56		

The Employee List Section

The employee list appears throughout the system but it is first seen on the Employee screen. Every employee you manage should appear in this list.

EE#	Last 🔺	First			
245364788	Chide	Bob			
123123123	Chip	Lori			
901901901	Dyde	Doug			
234234234	Gassud	Jennifer			
789789789	Hernandez	Gustavo			
567567567	James	Nolan			
678678678	Johnson	Nora			
345678912	Paul	Peter			
912345678	Pierce	Edwin			
678912345	Rosen	Annabel			
891234567	Tyson	Rosalinda			
456456456	Young	Lauren			
Figure 57					

Sorting the Employee List

There are 3 ways to sort the employee list – by employee number, by last name or by first name.

- 1. To sort the list click on the title you wish to sort by EE#, Last or First.
- 2. Click the column title again to toggle from ascending to descending or back again.

Selecting an Employee

Clicking on an employee's name will highlight their name in blue and bring up their corresponding data to the right of the Employee List section.

Employee Filter

The Employee Filter button appears in the top right corner of the Employee List section. Click on this button to filter the complete list of employees into a more manageable grouping. See Filtering Employees in the Home screen.

The Employee Profile Section

The Employee Profile section lists all pertinent personal information for the employees you will manage. You can navigate from one employee to the next and back again by clicking on the gray arrows for the top right corner of the screen.

Employee Profile					
245364788 - Chide, Bob					
All	Informat	ion			
Profile					
Employee #:	Badge #:	Status:			
245364788	55432	Active			
First Name:	Middle Name:	Last Name:			
Bob	т	Chide			
Title:	Start Date:				
Line Analyst	08/14/2006				
Manager:	Time Zone:				
912345678 - Pierce, Edwin	(GMT-05:00) Eastern Time (US &	C			
Contacts					
Address 1:	Email:	Alert Email:			
345 1st Street	bchide@yahoo.com				
Address 2:	Phone 1:				
	412-555-2343				
City:	Phone 2:				
Pittsburgh	412-963-5309				

The sections and fields are described in detail in this section.

Profile Section	
Employee #	A unique number assigned to each employee. This number is used as the User ID for web logins
Badge #	A unique number given to employee for punching at a clock
Status	Active, Inactive, FMLA, Leave of absence or Terminated
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Title	Title
Start Date	The employee's first day of employment
Manager	Name of the manager who will oversee the employee's timecards

Time Zone	The time zone where the employee will punch from or where the employee resides.
Contact Section	
Address 1	Primary address
Email	Primary email
Alert Email	Email used for Alert Module
Address 2	Secondary address
City	City
State	State
Zip	Zip
Phone 1	Primary phone number
Phone 2	Secondary phone number
Phone 3	Additional phone number

Time Cards Screen

The Time Cards Screen is where the system captures all of the employees' punches and calculates hours worked. There are 6 sections in the Time Cards screen: Time Card, Pay Adjustment, Time Card Approvals, Comp Time Approvals, Forecast & Points. The last 3 – Comp Time Approvals, Forecast and Points– may not appear in your system as they are modules which are purchased separately.

Each section (or tab) will have different screens which will be described in this section. However, the Employee List, as described in the Employee Screen section earlier, will remain the same.

In addition, each section will have the Mass Transaction Editor and the Legend available.

Mass Transaction Editor: The Mass Transaction Editor button ¹/₂, in the top right corner of the screen, allows you to enter or delete a single transaction for more than one employee.

The Legend: The Information button in the top right corner of screen ¹⁰ will provide you with a legend for the different buttons available to you throughout the screens.



Time Card

The Time Card screen captures all of the punches the employee enters and also calculates overtime based on your company's rules.

Time Ca	ard Pay	/ Adjust	ment	Time	e Card Appr	ovals Com	p Time App	provals Forecast	Points					🦻 🚺
EE#	Last 🔺	First	> ≪	1	7907907	20 - Hornan	daz Guet	340						
245364788	Chide	Bob			789789789 - Hernandez, Gustavo									
123123123	Chip	Lori			**	Pay Period	i »	09/29/2014	- 10/05/2	014	**	Wee	k	»
901901901	Dyde	Doug		🕈 A	dd Shift	Туре	In	Labor Level	Туре	Out	R	eg 01	r –	Unpaid
234234234	Gassud	Jennifer			Monday	09/29/2014			_					
789789789	Hernandez	Gustavo		Þ	🗠 🥶	Clock In	09:15 AM	6000/200/210	Clock Out		Total:	0.00	0.00	0.00
567567567	James	Nolan			Tuesday	09/30/2014								
678678678	Johnson	Nora		▶		Clock In	08:00 AM	6000/200/210	Clock Out	04:00 PM	Total:	7.00	0.00	1.00
345678912	Paul	Peter			Wednesday	10/01/2014	ABS							
010045670	Diamen	Eduda		▶	🗠 🥶	Clock In		///	Clock Out	06:15 PM	Total:	0.00	0.00	0.00
670012245	Decen	Annahal			Thursday	10/02/2014	ABS							
678912345	Kosen	Annabel		₽	۵.	Clock In		///	Clock Out	04:15 PM	Total:	0.00	0.00	0.00
891234567	Tyson	Rosalind	a <u>w</u>		Friday	10/03/2014	\Lambda ABS							
456456456	Young	Lauren												
				Tota	l Summary									
											Works	7.00		
											Monte	7.00		1.00
											Total	7.00	0.00	1.00
											rocar	7.00	0.00	1.00



Understanding Time Card

The details of the screen are explained below.

Refresh/Reprocess Time Card button: This button appears to the left of the employee's name **a**.

Name: The name of the employee's time card being viewed will be highlighted on the left in the employee list and also will appear in bold, black lettering at the top of the time card along with the employee's number.

Employee Scrolling Arrows: These buttons appear in the top right corner of the Time Card Screen. They are used to navigate back and forth from one employee to another within the Employee List.

Navigating Dates: Select the date range you would like to include in this view.

- Click on the Pay Period button to see an entire month's worth of Alerts. You can move to other pay periods by using the arrow buttons to the left and right of the Pay Period button.
- Enter in user-defined dates.
- Click on the Week button to see an entire week's worth of Alerts. You can move to other weeks by using the arrow buttons to the left and right of the Week button.

The columns are described in the following table.

Add Shift Button	This button will allow you to enter or edit any punches. It will be explained in more detail later in this section.
Туре	This column refers to the type of In punch that was entered. For example, a Clock In or a Begin Meal punch.
In	The time of the In punch
Labor Level	The labor level(s) linked to that punch. This will determine where the hours are being billed.
Туре	This column refers to the type of Out punch that was entered. For example, a Clock Out or an End Break punch.
Out	The time of the Out punch.
Reg	The number of hours worked at the regular pay rate.
ОТ	The number of hours worked at the overtime pay rate.
Unpaid	The number of hours, which will not be paid.
Total Summary	The total number of hours for Work and Non-Work time in regular, overtime and unpaid hours.
Editing the Time Card

There are several ways to edit the time card. We will explore several of these options in this section.

Expanding the View

You may need to expand the view of any given day to see what exactly is going on in a time card. By default, the timecard will show a one-line snapshot of a day, as seen below.

Tuesday	09/30/2014									
	Clock In	08:00 AM	6000/200/210	Clock Out	04:00 PM	Total:	7.00	0.00	1.00	
Figure 61										

Click on the small blue arrow underneath the day of week.



The expanded view will appear.

To make time card edits, click on the pencil icon \checkmark which appears when the mouse pointer hovers in the area circled in Figure 61.

	Tuesda	y 0	9/30/2014								
▼											
		Ø¥	Clock In	08:00 AM	6000/200/210	Begin Meal	12:00 PM		4.00		
			Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
		Δ	Work	01:00 PM	6000/200/210	Clock Out	04:00 PM		3.00		
		4						Total:	7.00	0.00	1.00



Editing a Missing Punch

If an employee has missed a punch, the system will flag the missing punch and show it as a red box in the employee's timecard.

Follow these steps to correct or edit the missing punch.

- 1. Click on a red box. That day will open up with details.
- 2. Click on the red box again. The Missing Punch correction screen will appear.

09/29/2014 0										
0	Sep)	\$ 2	014	•					
Su	Su Mo		We	Th	Fr	Sa				
	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								
Time 06:15 PM										
					Sa	ive				

- 3. Be sure the correct day is selected.
- 4. Enter in the time for the missing punch.
- 5. Click the Save button. The day may look something like the screenshot below.

	Monda	У	09/29/2014								
▼											
			Clock In	09:15 AM	6000/200/210	Begin Meal	12:00 PM		2.75		
			Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
		Δ	Work	01:00 PM	6000/200/210	Clock Out	04:00 PM		3.00		
4							Total:	5.75	0.00	1.00	
					Figu	re 65					

NOTE: The meal in this example was system generated automatically.

The system uses logic to suggest what type of punch is missing, but this will not always be correct due to some mistakes the user can make. Carefully review all times and types of punches to determine what truly is missing or otherwise incorrect. Punches may need to be added or deleted.

Adding a Punch

In some cases an employee might forget to enter in several punches in a row, which prevents the system from correctly calculating how long the employee actually worked. In these cases the Missing Punch assumption may not be accurate and you might need to manually enter in a punch.

1. Click on the Add Shift button and select "Add Punch" from the pop-up list.



The Add Punch screen will appear.

Clock In ¢ 09/29/2014 08:00 AM		Duplicate this entry for 0 additional days. Include Saturdays when creating recurring entries Include Sundays when creating recurring entries						
abor Levels Division 6000-Scottsdale	Department 200-Accounting	•	Job 210-AR	\$				
Modifiers								
Additional Options								
	(Cancel	Save					

- 2. Complete the punch section.
 - a. Select the type of punch you would like to enter for these employees from the drop-down menu.
 - b. Enter the date for the punch.
 - c. Enter the time for the punch.
 - d. Enter any additional notes needed for the punch.

NOTE: You may use the notes shortcut button ^{III} to enter in a shortcut note.



e. Click the box to approve the punch.



- f. If this punch should be entered for more than one day, enter in the number of *additional* days you would like to add. For example, if you would like to enter the same punch for 3 days, you would enter a 2 in the box.
- g. Check the "Include Saturdays when creating recurring entries" box if you would like duplicate punches to be entered on Saturday. Leave the box unchecked if you want it to skip Saturday.
- h. Check the "Include Sundays when creating recurring entries" box if you would like duplicate punches to be entered on Sunday. Leave the box unchecked if you want it to skip Sunday.
- 3. Select the Labor Levels from the drop-down menus for each level.
- 4. Select the modifier from the drop-down list.
- 5. Click Apply.
- 6. Select Additional options if necessary.
 - a. Enter in a dollar amount to override any existing pay rates.
 - b. Enter this punch as a swipe and go.
- 7. Click the Save button.

Adding a Work Shift

A work shift can be added for many different reasons. For example, it may be added if an employee was unable to enter the punches for themselves.

1. Click on the Add Shift button and select "Add Work Shift" from the pop-up list.

4	Add Shift Ty
C	Add Punch
1	Add Work Shift
	Add Non-Work Shift
1	Figure 70

The Add Work Shift screen will appear.

Type Clock In ↓ 09/29/2014 08:00 AM ■	Type Clock Out \$ 09/29/2014 04:00 PM	Duplicate this entry for 0 additional days. Include Saturdays when creating recurring entries Include Sundays when creating recurring entries
Labor Levels Division 6000-Scottsdale Modifiers	Department 200-Accounting	Job 210-AR \$
Additional Options		
	Cancel	Save

- 2. Complete the punch section.
 - a. Select the Clock-In punch from the drop-down menu.
 - b. Enter the date for the punch.
 - c. Enter the time for the punch.
 - d. Enter any additional notes needed for the punch.

NOTE: You may use the notes shortcut button ^{III} to enter in a shortcut note.



- e. Select the Clock-Out punch from the drop-down menu.
- f. Click the box to approve the punch.

]
Mana	ager Unapproved (Click to Approve)
	Figure 73

- g. Repeat steps b-f for the ending punch.
- h. If this shift should be entered for more than one day, enter in the number of *additional* days you would like to add. For example, if you would like to enter the same punch for 3 days, you would enter a 2 in the box.

- i. Check the "Include Saturdays when creating recurring entries" box if you would like duplicate shifts to be entered on Saturday. Leave the box unchecked if you want it to skip Saturday.
- j. Check the "Include Sundays when creating recurring entries" box if you would like duplicate shifts to be entered on Sunday. Leave the box unchecked if you want it to skip Sunday.
- 3. Select the Labor Levels from the drop-down menus for each level.
- 4. Select the modifier from the drop-down list if necessary.
- 5. Click Apply.
- 6. Select Additional options if necessary.
 - a. Enter in a dollar amount to override any existing pay rates.
 - b. Enter this punch as a swipe and go.
- 7. Click the Save button. The shift for that day may look something like the screenshot below.

	Friday		10/03/2014								
~											
			Clock In	08:00 AM	6000/200/210	Begin Meal	12:00 PM		4.00		
			Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
	0	Δ	Work	01:00 PM	6000/200/210	Clock Out	04:00 PM		3.00		
		4	1					Total:	7.00	0.00	1.00



NOTE: The meal in this example was system generated automatically.

Adding a Non-Work Shift

A non-work shift can be added for many different reasons. For example, if an employee took a Paid Time Off day you would need to override the absence with a Non-work shift.

1. Click on the Add Shift button and select "Add Non-Work Shift" from the popup list.



The Add Non-Work Shift screen will appear.

Type Bereavement \$ 09/29/2014 08:00 AM	B hrs	Time Off Available H Personal Time Off	ours 78.16	Duplicate this entry for 0 additional days. Include Saturdays when creating recurring entries Include Sundays when creating recurring entries
Division 6000-Scottsdale	Department 200-Accounting	\$	Job 210-	AR \$
Modifiers				
Additional Options				
		🔊 Cancel		Save
		Figure 7	6	

- 2. Complete the non-work shift section.
 - a. Select the non-work shift from the drop-down menu.
 - b. Enter the date for the non-work shift.
 - c. Enter the time for the non-work shift to begin.
 - d. Enter the number of hours taken, which also will be deducted from the balance, if applicable.
 - e. Enter any additional notes needed for the non-work shift.

NOTE: You may use the notes shortcut button a shortcut note.

	1	
	DA - Doctor's Appointment	
La	MP - Missing Punch	
	PRE - PreApproved Variance	
Ū	UA - Unexcused Absence	
	Figure 77	

f. Click the box to approve the punch.



- g. You will notice a small "Time Off" section this will let you know the available time off balance hours the employee has available.
- h. If this non-work shift should be entered for more than one day, enter in the number of *additional* days you would like to add. For example, if you would like to enter the same punch for 2 days for a Thanksgiving break, you would enter a 1 in the box.
- i. Check the "Include Saturdays when creating recurring entries" box if you would like duplicate non-work shifts to be entered on Saturday. Leave the box unchecked if you want it to skip Saturday.
- j. Check the "Include Sundays when creating recurring entries" box if you would like duplicate non-work shifts to be entered on Sunday. Leave the box unchecked if you want it to skip Sunday.
- 3. Select the Labor Levels from the drop-down menus for each level.
- 4. Select the modifier from the drop-down list if applicable.

- 5. Click Apply.
- 6. Select Additional options if necessary.
 - a. Enter in a dollar amount to override any existing pay rates.
 - b. Enter this punch as a swipe and go.
- 7. Click the Save button. The non-work shift for that day may look something like the screenshot below.

	Friday 1	0/03/2014									
▶		Personal Tim	08:00 AM	6000/200/210			Total:	8.00	0.00	0.00	
	Figure 79										

Deleting a Shift

1. Click on the blue arrow ▶ under any given day to expand the details of the shift. The details will appear as seen below.

	Tuesday	y O	9/30/2014								
▼											
	0	Ø¥	Clock In	08:00 AM	6000/200/210	Begin Meal	12:00 PM		4.00		
			Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
	D 🔎 💧	Δ	Work	01:00 PM	6000/200/210	Clock Out	04:00 PM		3.00		
		- ÷						Total:	7.00	0.00	1.00
					Figu	re 80					

2. An edit button and a delete button will appear when you move your cursor to the left of the punch type.

Click on the red x button $\stackrel{\textbf{X}}{\Rightarrow}$ next to the part of the shift you would like to delete.

The confirmation screen will appear.



- 3. Click the Delete button to delete the punch shown.
 - a. If the punches are all manual, then that punch will disappear.
 - b. If you have any system-generated punches like a meal or break, then the system will show you another confirmation screen.

Confi	irmat	tion			×
Deleti punch Are su	ng Cl les. Jre yo	lock In will o ou want to c	delete lelete	auto genera	ted
		Cancel	X	Delete	
		Figu	re 82		

Refreshing the Time Card

Refreshing the time card is typically done to update the screen with the most recent changes. This is often used when a manager wants to see if an employee has punched since they began viewing their time card.

Click on the Refresh button underneath the Employee button as seen below.



NOTE: Clicking on another employee and then going back to the first is another way to refresh a screen.

Reprocessing the Time Card

Reprocessing is typically done when a change has been made to an employee's assignments or policies. Reprocessing processes time card data again to apply any new assignments, rules, or policies.

Click on the Reprocess button underneath the Employee button as seen below.

	3	245364788 - Ch	ide,	Bob
	Re	efresh	bd	
•	Re	eprocess Time Card	14	In
		Figure 84		

Approving the Time Card

Approving the Time Card from the Time Card screen can be done by punch or by day.

Approving the Time Card by Punch

As you are editing an employee's time card you may find it helpful to approve each punch as you view it. To do this you click on the corresponding box to the left of the punch, underneath the blue arrow.

	Thursday	10/09/2014	\Lambda ABS							
~										
	$\square \rho$	Clock In	11:15 AM	6000/200/210	Begin Meal	12:00 PM		0.75		
		Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
	D 🔎	Work	01:00 PM	6000/200/210	Clock Out	07:15 PM		6.25		
	4	þ					Total:	7.00	0.00	1.00
				Figur	0.95					



Once the punch is approved it will show a green arrow in the corresponding line as seen below.

	Thursday 1	0/09/2014	\Lambda ABS							
▼										
S	0	Clock In	11:15 AM	6000/200/210	Begin Meal	12:00 PM		0.75		
S		Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
		Work	01:00 PM	6000/200/210	Clock Out	07:15 PM		6.25		
	÷						Total:	7.00	0.00	1.00

Figure 86

Approving the Time Card by Day

As you are editing an employee's time card you may find it helpful to approve each day as you review it. To do this you click on the box to the left of the day of the week, in the blue header. In the screenshot below it would be the box next to the "Thursday."

	Thursday	10/09/2014	🔥 ABS							
~										
	D 🔎	Clock In	11:15 AM	6000/200/210	Begin Meal	12:00 PM		0.75		
		Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
		Work	01:00 PM	6000/200/210	Clock Out	07:15 PM		6.25		
	1	÷					Total:	7.00	0.00	1.00

Figure 87

Once the day is approved it will show a green arrow next to the day of the week and in all of the punches for that day.

1	Thursday	10/09/2014	\Lambda ABS							
▼										
ø	P	Clock In	11:15 AM	6000/200/210	Begin Meal	12:00 PM		0.75		
S		Begin Meal	12:00 PM	6000/200/210	End Meal	01:00 PM				1.00
S	P	Work	01:00 PM	6000/200/210	Clock Out	07:15 PM		6.25		
	l l	÷					Total:	7.00	0.00	1.00



Using the Mass Transaction Editor

The Mass Transaction Editor button , on the far right corner of the screen, allows you to enter or delete a single transaction for more than one employee. With this feature you can add a punch, add a shift, add a non-work shift or delete multiple time card related entries for multiple employees with one transaction.

Mass Transactio	n Editor					×
Transaction Type: 🚺	dd Punch 😫					
Select Employees: 🔊	1					-
Nbr 🔺	Name			Nbr *	Name	
123123123	Chip, Lori					
234234234	Gassud, Jennifer					
245364788	Chide, Bob					
345678912	Paul, Peter					
456456456	Young, Lauren		~			
567567567	James, Nolan		44			
678678678	Johnson, Nora					
678912345	Rosen, Annabel	4				
789789789	Hernandez, Gustavo	v				
Unselected: 12				Selected: 0		4
Туре		Duplicate	e this e	ntry for 0 ad	ditional days.	
Clock In	\$	Includ	le Satu	rdays when creatin	g recurring entries	
09/29/2014	08:00 AM	🗆 Incluc	le Sun	days when creating	recurring entries	
	L)					
Labor Levels						4



Adding a Punch with the Mass Transaction Editor

- 1. Click on the Mass Transaction Editor button 🧐.
- 2. Select "Add Punch" from the drop-down menu for Transaction Type.
- 3. Select the employees you would like to include for this punch by either double-clicking on their name or highlighting their name and clicking on the gray arrow.

NOTE: The total number of employees will be reflected on the bottom of the Selected box as seen below.

Nbr 🔺	Name
123123123	Chip, Lori
456456456	Young, Lauren
678912345	Rosen, Annabel
891234567	Tyson, Rosalinda
Selected: 4	
	Figure 90

- rigure
- 4. Complete the punch section.

୮୮	/pe	Duplicate this entry for 0 additional days.
	Clock In 💠	Include Saturdays when creating recurring entries
	09/26/2014 08:00 AM	□ Include Sundays when creating recurring entries
P		

Figure 91

- a. Select the type of punch you would like to enter for these employees from the drop-down menu.
- b. Enter the date for the punch.
- c. Enter the time for the punch.
- d. Enter any additional notes needed for the punch.
- e. If this punch should be entered for more than one day, enter in the number of *additional* days you would like to add. For example, if you would like to enter the same punch for 3 days, you would enter a 2 in the box.
- f. Check the "Include Saturdays when creating recurring entries" box if you would like duplicate punches to be entered on Saturday. Leave the box unchecked if you want it to skip Saturday.
- g. Check the "Include Sundays when creating recurring entries" box if you would like duplicate punches to be entered on Sunday. Leave the box unchecked if you want it to skip Sunday.
- 5. Complete the Labor Level section.

isplay All Labor Levels	\$	
Division	Department	Job
<employee default=""> \$</employee>	<employee default=""> \$</employee>	<employee default=""> \$</employee>

- a. Select which Labor Levels you would like to view by selecting one of the choices from the drop-down menu.
 - i. Select "Display All Labor Levels" to see every Labor Level in the system.
 - ii. Select "Display Labor Levels Available to All Selected Employees" to only see the Labor Levels to which the selected employees are assigned.
- b. Select the Labor Levels from the drop-down menus for each level.
 - i. If you leave the Labor Levels to Employee Default, the punch will be assigned to the pre-defined default settings.
 - ii. If you enter in specific Labor Levels, you will be setting one Labor Level for *all* of the employees.
- 6. Select the modifier from the drop-down list if necessary.
- 7. Click Apply.
- 8. Select Additional options if necessary.
 - a. Enter in a dollar amount to override any existing pay rates.
 - b. Enter this punch as a swipe and go.
- 9. Click the Save button.

Adding a Work Shift with the Mass Transaction Editor

- 1. Click on the Mass Transaction Editor button 🧐.
- 2. Select "Add Work Shift" from the drop-down menu for Transaction Type.
- 3. Select the employees you would like to include for this punch by either doubleclicking on their name or highlighting their name and clicking on the gray arrow.

NOTE: The total number of employees will be reflected on the bottom of the Selected box as seen below.

Figure 92

Nbr 🔺	Name	
123123123	Chip, Lori	
456456456	Young, Lauren	
678912345	Rosen, Annabel	
891234567	Tyson, Rosalinda	
891234567	Tyson, Rosalinda	

Figure 93

4. Complete the shift section.

ту	pe	ype		Duplicate this entry for 0 additional
	Clock In 🛟	Clock Out	\$	days.
	09/29/2014 08:00 AM	09/29/2014	04:00 PM	Include Saturdays when creating recurring entries
D				Include Sundays when creating recurring entries
				Add Meal Add Break



- b. Select the starting punch you would like to enter for these employees from the drop-down menu.
- c. Enter the date for the punch.
- d. Enter the time for the punch.
- e. Enter any additional notes needed for the punch.
- Repeat steps a-d for the ending punch. f.
- g. If this punch should be entered for more than one day, enter in the number of additional days you would like to add. For example, if you would like to enter the same punch for 3 days, you would enter a 2 in the box.
- h. Check the "Include Saturdays when creating recurring entries" box if you would like duplicate punches to be entered on Saturday. Leave the box unchecked if you want it to skip Saturday.
- Check the "Include Sundays when creating recurring entries" box if i. you would like duplicate punches to be entered on Sunday. Leave the box unchecked if you want it to skip Sunday.
 - i. To add a meal
 - 1. Click on the Add Meal button. The Add Meal section will appear.

уре	Туре
Begin Meal 💲	End Meal 🛟
09/29/2014 12:00 PM	09/29/2014 01:00 PM

Figure 95

- 2. Enter the beginning date for the meal.
- 3. Enter the beginning time for the meal.

- 4. Enter any additional notes needed for the meal.
- 5. Enter the ending date for the meal.
- 6. Enter the ending time for the meal.
- 7. Enter any additional notes needed for the meal.
- ii. To add a Break
 - 1. Click on the Add Meal button. The Add Meal section will appear.

End Break 😫
09/29/2014 09:15 AM

- 2. Enter the beginning date for the break.
- 3. Enter the beginning time for the break.
- 4. Enter any additional notes needed for the break.
- 5. Enter the ending date for the break.
- 6. Enter the ending time for the break.
- 7. Enter any additional notes needed for the break.
- 5. Complete the Labor Level section.

isplay All Labor Levels	\$	
Division	Department	Job
<employee default=""> \$</employee>	<employee default=""> \$</employee>	<employee default=""> \$</employee>



- a. Select which Labor Levels you would like to view by selecting one of the choices from the drop-down menu.
 - i. Select "Display All Labor Levels" to see every Labor Level in the system.
 - ii. Select "Display Labor Levels Available to All Selected Employees" to only see the Labor Levels to which the selected employees are assigned.
- b. Select the Labor Levels from the drop-down menus for each level.
 - i. If you leave the Labor Levels to Employee Default, the punch will be assigned to the pre-defined default settings.
 - ii. If you enter in specific Labor Levels, you will be setting one Labor Level for *all* of the employees.
- 6. Select the modifier from the drop-down list if necessary.
- 7. Click Apply.
- 8. Select Additional options if necessary.
 - a. Enter in a dollar amount to override any existing pay rates.
 - b. Enter this punch as a swipe and go.
- 9. Click the Save button.

Adding a Non-Work Shift with the Mass Transaction Editor

- 1. Click on the Mass Transaction Editor button 🧐.
- 2. Select "Add Non-Work Shift" from the drop-down menu for Transaction Type.

 Select the employees you would like to include for this punch by either double-clicking on their name or highlighting their name and clicking on the gray arrow.

NOTE: The total number of employees will be reflected on the bottom of the Selected box as seen below.

Nbr 🔺	Name
123123123	Chip, Lori
456456456	Young, Lauren
678912345	Rosen, Annabel
891234567	Tyson, Rosalinda
Selected: 4	

4. Complete the non-work shift section.

Bereavement 💠		Include Saturdays when creating recurring entries
9/29/2014 08:00 AM	8 hrs	Include Sundays when creating recurring entries

Figure 99

- b. Select the non-work shift from the drop-down menu.
- c. Enter the date for the non-work shift.
- d. Enter the time for the non-work shift to begin.
- e. Enter the number of hours taken, which also will be deducted from the accruals.
- f. Enter any additional notes needed for the non-work shift.
- g. If this punch should be entered for more than one day, enter in the number of *additional* days you would like to add. For example, if you would like to enter the same punch for 2 days for a Thanksgiving break, you would enter a 1 in the box.
- h. Check the "Include Saturdays when creating recurring entries" box if you would like duplicate punches to be entered on Saturday. Leave the box unchecked if you want it to skip Saturday.
- i. Check the "Include Sundays when creating recurring entries" box if you would like duplicate punches to be entered on Sunday. Leave the box unchecked if you want it to skip Sunday.
- 5. Complete the Labor Level section.

abor Levels		
Display All Labor Levels	\$	
Division	Department	Јор
<employee default=""> \$</employee>	<employee default=""> \$</employee>	<employee default=""> \$</employee>

Figure 100

- a. Select which Labor Levels you would like to view by selecting one of the choices from the drop-down menu.
 - i. Select "Display All Labor Levels" to see every Labor Level in the system.
 - ii. Select "Display Labor Levels Available to All Selected Employees" to only see the Labor Levels to which the selected employees are assigned.
- b. Select the Labor Levels from the drop-down menus for each level.
 - i. If you leave the Labor Levels to Employee Default, the punch will be assigned to the pre-defined default settings.
 - ii. If you enter in specific Labor Levels, you will be setting one Labor Level for *all* of the employees.
- 6. Select the modifier from the drop-down list if necessary
- 7. Click Apply.
- 8. Select Additional options if necessary.
 - a. Enter in a dollar amount to override any existing pay rates.
 - b. Enter this punch as a swipe and go.
- 9. Click the Save button.

Deleting a Punch with the Mass Transaction Editor

- 1. Click on the Mass Transaction Editor button 🧐.
- 2. Select "Delete" from the drop-down menu for Transaction Type.
- 3. Select the employees you would like to include for this delete by either double-clicking on their name or highlighting their name and clicking on the gray arrow.

NOTE: The total number of employees will be reflected on the bottom of the Selected box as seen below.

Nbr 🔺	Name
123123123	Chip, Lori
456456456	Young, Lauren
678912345	Rosen, Annabel
891234567	Tyson, Rosalinda
Selected: 4	

Figure 101

4. Complete the delete section.

Time Card 🗘 Ali 🗘	

Figure 102

a. Select Time Card from the first drop-down menu.

- b. Select the transaction type from the second drop-down menu.
- c. Enter the start date for the transaction to be deleted.
- d. Enter the end date for the transaction to be deleted.
- 5. Click the Save button.

Pay Adjustment

Pay Adjustments are dollar amounts that can be added to or taken away from an employee's pay. For example, an employee might have a uniform cost deducted from their pay or they might have a mileage reimbursement added to their pay.

🌡 789789789 - Hernandez, Gustavo 🔶										-				
	~	Pay P	eriod	»		09/29/2	2014 -	10/05	5/2014	«		Week		*
Þ Ac	dd	Date	Туре		Units		Rate		Amount	Labor Level	E	Earnings	Ded	uctions
r -	1	10/01	Mileage						\$10.8	0 6000/200/		\$10.80		
	14/	10/02	Uniform C						\$15.0	0 6000/200/				\$15.00
		Subt	Mileage						\$10.8	0				
		Subt	Mileage Uniform						\$10.8 \$15.0	0				
		Subt	Mileage Uniform						\$10.8 \$15.0	0		arnings	Dedu	uctions

Figure 103

Understanding the Pay Adjustments Screen

The details of the screen are explained below.

Refresh/Reprocess Time Card button: This button appears to the left of the employee name **S**.

Name: The name of the employee's time card being viewed will be highlighted on the left in the employee list and also will appear in bold, black lettering at the top of the time card along with the employee's number.

Employee Scrolling Arrows: These buttons appear in the top right corner of the Time Card Screen. They are used to navigate back and forth from one employee to another within the Employee List.

Navigating Dates: Select the date range you would like to include in this view.

- Click on the Pay Period button to see an entire month's worth of Alerts. You can move to other pay periods by using the arrow buttons to the left and right of the Pay Period button.
- Enter in user-defined dates.

• Click on the Week button to see an entire week's worth of Alerts. You can move to other weeks by using the arrow buttons to the left and right of the Week button.

The columns are described in the following table.

Date	The date of the adjustment.
Туре	The type of pay adjustment that was entered.
Units	The number of units. Units are typically used when employees are paid by piece rates. So in that example it would be the number of units produced.
Rate	The dollar amount to be paid for every unit completed. Used for a multiplier adjustment.
Amount	The dollar amount being added or taken away.
Labor Level	The labor levels assigned to this adjustment.
Earnings	Amounts being added to the employee's paycheck.
Deduction	Amounts being deducted from the employee's paycheck.
Subtotals	Totals grouped together by adjustment type.
Total	Totals grouped together as Earnings or Deductions.

Details of the Pay Adjustments

There are 4 items associated with each pay adjustment entry: Approvals, Notes, Audit Trails and Details.

Approvals

If the administrator has approved the pay adjustment, it will appear with a green checkmark at the beginning of the line. If it has not been approved, you will see an empty box. In the screenshot below the mileage has been approved, but the Uniform Cost has not been approved.

🕹 789789789 - Hernandez, Gustavo									
	«	Pay P	eriod	» 0	9/29/2014 -	10/05/2014	«	Week	*
+ /	٨dd	Date	Туре	Units	Rate	Amount	Labor Level	Earnings	Deductions
đ	0 🛛 🗶 🧷	10/01	Mileage			\$10.80	6000/200/	\$10.80	
	1	10/02	Uniform C			\$15.00	6000/200/		\$15.00
					Figure 1	04			

Notes

To see any notes entered when the pay adjustment was entered, hover over the piece of paper icon.

\$	🕹 789789789 - Hernandez, Gustavo 🛛 💝 👄										
	«	Pay P	eriod	»	09/29/2014 -	10/05/2014	«	Week	*		
4	Add	Date	Туре	Units	Rate	Amount	Labor Level	Earnings	Deductions		
đ	🗋 🕲 🗱 🧷	10/01	Mileage			\$10.80	6000/200/	\$10.80			
	24 miles		iform C			\$15.00	6000/200/		\$15.00		
					Eiguro	105					

Figure 105

Details

To see the details associated with a pay adjustment click on the magnifying glass icon.

8	789789789 - Hernandez, Gustavo 🦛 🖨									
	**	Pay Period	»	09/29/20	014 -	10/05/2014	**	Week	»	
		Date Type	U	nits	Rate	Amount	Labor Level	Earnings	Deductions	
2	🗋 💟 🔎	10/01/14 Mileage				\$10.	80 6000/200/210	\$10.80		
Da	ite:	Type: Mileage	Ur	nits:	Amount: \$10.	: Cal	culation:			
				0.00						
No	tes:									
24	miles									
	Labor Lev	rels								
					Canaal					

Figure 106

Time Card Approvals

Time Card Approvals is a management tool designed to provide both the employee and the manager with the assurance of accurate time cards so payroll is processed correctly.

Step 1	- Sel	ect Filter	Step 2 - Review Employee Approvals	Step 3 - Review Manager Approvals			
	« 10/06 Comp 1 'iew E	Current Pay Period > v2014 - 10/12/2014 Time Hou Payroll Policy mployees: Direct Reports *	Unapproved Unapproved	Unapproved			
Step	4 - A	pprove Time Cards					🐚 🛞 🎯
		Employee			Emp	Mgr	R
		Gassud, Jennifer			•	•	0
		Young, Lauren			•	0	
		Dyde, Doug			•	•	
		Pierce, Edwin			•		
		Paul, Peter			•		
		Rosen, Annabel			•	•	
۲		Tyson, Rosalinda			•		
		James, Nolan			•	•	U
		Johnson, Nora			•	•	Ă
	-					Annound O Destinity Annound O	1 Income and
					e Pully	Approved - Fundally Approved	onapproved

Figure 107

There are 4 steps in the Approval Process:

- Step 1: Select Filter
- Step 2: Review Employee Approvals
- Step 3: Review Manager Approvals
- Step 4: Approve Time Cards

These 4 steps will be described in more detail in the sections below.

Step 1: Select Filter

The Filter section is made up of 2 filters: date range and employees.

	,					
09/29/2014 - 10/05/2014						
Comp	Time Ht 💠 Payr	oll Policy				
Comp	Time Ht 💠 Payr	oll Policy				

Figure 108

Date Range: There are two choices for the date range. First, you can select a payroll policy, which determines the pay period and then you are able to toggle back and forth for pay period dates. Second, you can enter in a user-defined date.

View Employees: There are two choices: Direct Reports or All Employees. Direct Reports would show you only those employees you are managing. All Employees would show all the employees you might oversee.

Step 2: Review Employee Approvals

Employees are responsible for letting you know when they have agreed to their Time Card. The Employee Approvals pie graph shows a visual representation of which of your employees have fully approved, partially approved or not approved their time card.



Filtering by Pie Graph

Clicking on any given section will filter the employees. For example, if you click on the "Unapproved" (red) section it will only show (in Step 4) the employees who have not approved their time cards.

Step 1	L - Sel	ect Filter	Step 2 - Review Employee Approvals	Step 3 - Review Manager	Approvals		
« Current Pay Period » 10/06/2014 - 10/12/2014 Comp Time Hou Payroll Policy View Employees: Direct Reports		Current Pay Period >> /2014 - 10/12/2014 Time Hou > Payroll Policy mployees: Direct Reports >	Unapproved Unapproved 6 Partially Approved	Unapproved	Partially Approved		
Step 4 - Approve Time Cards							
		Employee		Emp	Mgr 👂		
		Paul, Peter		•			
		Rosen, Annabel		•	•		
		Tyson, Rosalinda		•	•		
		James, Nolan		•	۲		
		Johnson, Nora		•	•		
		Hernandez, Gustavo		0			
				Fully Approved 😑	Partially Approved 😑 Unapproved		

Figure 110

Sending Reminder Messages to Employees

You are able to send a reminder message to employees to remind them to approve their time cards.

- 1. Click on the Message button 10.
- 2. Select Message Employees. The Message screen will appear with a preconfigured message.

New Message									
To: 7 selected		•	Expires:	10/23/2014					
Subject: Time Ca	rd Approval Remi	nder							
This is a reminder to approve your time cards.									
Thank you									
	🔊 Cancel	N	Send						
	Figu	iro 111							

- a. Select the employees from the drop-down menu in the "To" menu. NOTE: When you are messaging the employees only those who have unapproved or partially approved Time Cards will appear in this list.
- b. Enter in an "Expires" date.
- c. Enter in a subject for the message.
- d. Enter in any additional text as needed.
- 3. Click the Send button. You will be directed to the Message center.
- 4. Click the Close button.

Refreshing the Approval Screen.

Once a message has been sent out it is very possible that employees and managers will quickly approve their time.

To refresh your screen to see the most current approvals click on the Refresh button B.

Step 3: Review Manager Approvals

Managers are responsible for approving time cards to show they have approved all of the hours worked. The Manager Approvals pie graph shows a visual representation of which of the employees have been fully approved, partially approved or not approved by a manager.

Filtering by Pie Graph

Clicking on any given section will filter the employees. For example, if you click on the "Unapproved" (red) section it will only show (in Step 4) the employees who have not been approved by their managers.



Figure 112

Sending Reminder Messages to Managers

You are able to send a reminder message to managers to remind them to approve their employees' time cards.

- 1. Click on the Message button 🔊.
- 2. Select Message Managers. The Message screen will appear with a premade message.

New Message				\$
To: Pierce, Edwin	¢		Expires:	10/23/2014
Subject: Time Card App	proval Remind	ler		
This is a reminder to appr	ove your time	cards.		
Thank you				
B	Cancel	Senc	i	/

- a. Select the managers from the drop-down menu in the "To" menu.
- b. Enter in a date you would like to have the message expire.
- c. Enter in a subject for the message.
- d. Enter in any additional text as needed.
- 3. Click the Send button. You will be directed to the Message center.
- 4. Click the Close button.

Refreshing the Approval screen.

Once a message has been sent out it is very possible that employees and managers will quickly approve their time.

To refresh your screen to see the most current approvals click on the Refresh button ¹

Step 4: Approve the Time Cards

Many companies will not process payroll until managers have approved time cards. Whether are you approving time cards because it is mandatory or not, it is a very simple process.

Understanding the Approval Screen

By default the Approval screen will show 4 columns: The approval box, employee names, "Emp" – the Employee Approval Status and "Mgr" – the Manager Approval Status.

The circles under the Employee and Manager Approval Status columns will appear in one of 3 colors as described in the legend.



Fully Approved: All days on the time card for the selected date range have been approved.

Partially Approved: Some days on the time card for the selected date range have been approved.

Unapproved: None of the days on the time card for the selected date range have been approved.

These color-coded circles give the manager a quick snapshot of how many time cards have been approved.

In the screenshot below you can see that the first employee is ok to process – both the employee and the manager have approved the time card. The second employee has approved their time cards, but the manager has not. The third employee has partially approved their time card, but the manager has not approved any. And the last employee has no approvals.

	Employee	Hours	Regular	от	Emp	Mgr
☑	Gassud, Jennifer	35.00	35.00	0.00	0	0
	Young, Lauren	40.00	40.00	0.00	•	0
	Dyde, Doug	42.00	40.00	2.00	•	0
	Pierce, Edwin	35.00	35.00	0.00	0	0
		Laura AAE				



Configuring the Approval Screen

The flexible configurations for this screen allow you as a manager to see what information is most important to you when approving your employees' time.

1. Click on the Configuration Gear button ^(a). The Configuration screen will appear.



- 2. Move the column headings from "Unselected" to "Selected" or back again by using the gray arrows.
- 3. Click the Save button. New columns will appear.

Step	4 - A	pprove Time Cards					1	} 🏟
		Employee	Hours	Regular	от	Emp	Mgr	>
		Gassud, Jennifer	35.00	35.00	0.00	۲	•	
		Dyde, Doug	42.00	40.00	2.00	۲	•	
		Pierce, Edwin	35.00	35.00	0.00	0	•	
		Paul, Peter	35.00	35.00	0.00	0	•	
		Rosen, Annabel	35.00	35.00	0.00	0	•	Ĩ
		Tyson, Rosalinda	12.75	12.75	0.00	0	•	
		Chip, Lori	35.00	35.00	0.00	•	•	
		James Nolan	35.00	35.00	0.00			•
					Fully Approve	d 😑 Partially App	proved 🔴 Unappr	oved

Figure 117

Approving Time Cards from the Approval Screen

Click on the corresponding box in the brown column to approve an employee's time card.

NOTE: If you, as a manager, are not sure if an employee's time should be approved you can double-click on their name to go to the Time Card screen. Here you can make any necessary changes before approving their time card.

Click on the top box next the "Employee" column to approve all employees.

NOTE: If there is a Missing Punch, the system will not permit a time card to be approved. The punch must first be corrected on the Time Card screen.

Comp Time Approvals

Comp Time Approvals are used when employees are given the option to choose between being paid for overtime hours or having them converted into Comp Time. Comp Time is not standard with the system and it must be purchased as an additional module.

Understanding the Comp Time Approvals Screen

The Comp Time Approvals screen is broken up into 2 sections – the filter and approval sections.

«	Current Pay Peri	iod »							
10/00	6/2014 - 10	0/12/2014							
Comp T	Comp Time Hou Payroll Policy								
View	View Employees: Direct Reports								
Comp	Time Approval						[AII]	🚽 🛞 🔈	
	Employee -	Total Available	Payout Hours	To Bank Hours	Status	Requested Date Range	Date/Time Submit		
 Ø 	Young, Lauren	0.00	3.00	3.00	Converted	10/06/2014 - 10/12/2014	10/15/2014		



Comp Time Filters

The Comp Time Filter section is made up of 2 filters: date range and employees.

09/29/2	014 -	10/05/201	4
Comp Time	e Ht 🛊 Pay	yroll Policy	
		Direct Descerts	

Figure 119

Date Range: There are two choices for the date range. First, you can select a payroll policy, which determines the pay period and then you are able to toggle back and forth for pay period dates. Second, you can enter in a user-defined date.

View Employees: There are two choices: Direct Reports or All Employees. Direct Reports would show you only those employees you are managing. All Employees would show all the employees you might oversee.

Comp Time Approval Section

This section shows which employees wish to convert their overtime hours into Comp Time. The employee's conversion is not banked until it has manager approval.

Comp 1	omp Time Approval								
	Employee 🔺	Total Availabl	Payout Hours	To Bank Hours	Status	Requested Date Range	Date/Time Submit		
 Ø 	Young, Lauren	7.50	0.00	7.50	Requested	09/29/2014 - 10/05/2014	10/16/2014		

1000				-	~
- FI	a	ure	- 1	2	U
	-			_	~

The columns within the Comp Time Approval section are described in the following table.

Approve All button	This button will approve all pending conversions listed.
Approval Button	This button will approve the conversion.
Denial Button	This button will deny the conversion.
Employee	The name of the employee requesting the conversion.
Total	This number refers to the total number of hours
Available	the employee has available to convert into Comp
	Time or to be paid out.
Payout Hours	This number refers to the number of hours, which will be paid with the employees regular hours worked
To Bank	This number refers to the number of hours, which
Hours	have been banked for Comp Time.
Status	There are 6 options for Status: Requested,
	Approved, Denied and Converted. The Requested
	status shows the employee is waiting for approval.
	The Approved status shows the manager

	approved the conversion. The Denied status shows the manager did not permit the conversion. And finally the Converted status shows the overtime hours were converted to Comp Time.
Requested Date Range	The range of dates in which the requested Comp Time hours fall.
Date/Time Submitted	The date and time the employee send the request.
Status Filter drop-down	Selecting one status from this drop-down menu will only show the group within one status.
Refresh Button	A button used to update the screen with any recent changes.
Employee Filter	The Filtering button allows you use specified criteria to only show a select group of employees.

Managing Requests for Comp Time

To approve ALL the pending conversions check the box next the Employee column header.

Comp 1	Time Approval
	Employee 🔺
	Figure 121

To approve a Comp Time conversion click on the Approval button \checkmark . Once the request has been approved the Approval button appears darker \checkmark .

To deny a Comp Time conversion request click on the Deny button \bigcirc . Once the request has been denied the Deny button appears lighter \oslash with no background.

Forecast

The Forecast module is a management tool, which can predict the hours an employee will work based on their schedule, a defined schedule or average hours worked. Typically, this module is used when companies run payroll before the pay period has ended. The Forecast module is not standard with the system and it must be purchased as an additional module.

Forecast Hours

Typically payroll administrators will forecast the employees' hours worked so that they may run payroll. When you open the Forecast tab it will appear as you see below.

EE# ^ Name Start Date: 123123123 Chip, Lori Image: Chick, Bob Image: Chick, Bob 345876812 Paul, Peter Image: Chick, Bob Image: Chick, Bob 345876855 Young, Luren Image: Chick, Bob Image: Chick, Bob 56756750 James, Nolan Image: Chick, Bob Image: Chick, Bob 56756750 James, Nolan Image: Chick, Bob Image: Chick, Bob 56756750 James, Nolan Image: Chick, Bob Image: Chick, Bob 57567567 James, Nolan Image: Chick, Bob Image: Chick, Bob 57567567 James, Nolan Image: Chick, Bob Image: Chick, Bob 5756757 James, Nolan Image: Chick, Bob Image: Chick, Bob 5756757 James, Nolan Image: Chick, Bob Image: Chick, Bob Unselected: 12 Selected: 0 Image: Chick, Bob Image: Chick, Bob Next Image: Chick, Bob Image: Chick, Bob Image: Chick, Bob	Forecast Hours Setup Forecast Apply Forecast Select Employees:									
123123123 Chip, Lori 243234234 Gassud, Jennifer 24354788 Chide, Bob 345678912 Paul, Peter 45645645 Voung, Lauren 567567567 James, Nolan 678612345 Rosen, Annabel Unselected: 12 Selected: 0	EE# *	Name		EE# *	Name	Start Date:				
234234234 Gassud, Jennifer 245364788 Chide, Bob 345678912 Paul, Peter 545454545 Young, Lauren 57567567 James, Noin 678678678 Johnson, Nora 678912345 Rosen, Annabel Unselected: 12 Selected: 0 Next	123123123	Chip, Lori	h							
245364788 Chide, Bob 345376912 Paul, Peter 456456456 Young, Lauren 67657567 Jahnson, Nora 67857857 Johnson, Nora 678512345 Rosen, Annabel Unselected: 12 Selected: 0	234234234	Gassud, Jennifer								
345678912 Paul, Peter 456456456 Young, Lauren 56756757 James, Nolan 67867867 Johnson, Nora 6786787 Johnson, Nora Unselected: 12 Selected: 0	245364788	Chide, Bob				End Date:				
456456456 Young, Lauren 56756757 James, Nolan 678676678 Johnson, Nora 678912345 Rosen, Annabel Unselected: 12 Selected: 0 Next	345678912	Paul, Peter	-							
56756757 James, Nolan 678678678 Johnson, Nora 678912345 Rosen, Annabel Unselected: 12 Selected: 0 Next	456456456	Young, Lauren	. 🔶							
678678678 Johnson, Nora 678912345 Rosen, Annabel Unselected: 12 Selected: 0 Next	567567567	James, Nolan								
67812345 Rosen, Annabel	678678678	Johnson, Nora								
Unselected: 12 Selected: 0	678912345	Rosen, Annabel	A V							
Next	Unselected: 1	2		Selected: 0						
							Next			
Reconcile Forcasted Hours	Reconcile Forcasted Hours									

Figure 122

Follow these steps to run the forecast.

1. Select the employees whose hours should be forecasted.

▼ Forecast Hours									
1 Setup Fo	recast 2 Apply Forecast								
EE# -	Name		EE# -	Name		Start Date:			
			123123123	Chip, Lori					
			234234234	Gassud, Jennifer		End Bates			
		\rightarrow	245364788	Chide, Bob		End Date:			
			345678912	Paul, Peter					
		4	456456456	Young, Lauren					
			567567567	James, Nolan					
			678678678	Johnson, Nora	Ļ				
			678912345	Rosen, Annabel	× V				
Unselected: 0			Selected: 12						
							Next		

Figure 123

2. Enter a Start Date.

NOTE: This date should be the first day that you would like to use forecasted hours (instead of actual punched hours) to process payroll.

3. Enter an End Date.

NOTE: This date should be the last day of the pay period. NOTE: You **cannot** delete forecasted hours once they are processed. Call support if needed.

4. Click the Next button. A confirmation screen will appear as seen below.



Figure 124

The forecasted hours on the Time Card screen will appear with a cloud icon next to the "Reg" column.

8	🕹 234234234 - Gassud, Jennifer 🔶 🚑												
	« Pay Period » 10/13/2014 - 10/19/2014 « Week »												
+/	Add Shift	Туре	In	Labor Level	Туре	Out	R	leg	от	Unpaid			
	Monday	10/13/2014											
		Clock In	08:00 AM	6000/200/230	Clock Out	06:00 PM	Total:	9.00	0.00	1.00			
	Tuesday	10/14/2014											
		Clock In	08:00 AM	6000/200/230	Clock Out	06:00 PM	Total:	9.00	0.00	1.00			
	Wednesday	10/15/2014	🔥 ABS										
▼													
		Clock In	08:00 AM		Begin Meal	12:00 PM	2	4.00					
		Begin Meal	12:00 PM		End Meal	01:00 PM	۵			1.00			
		Work	01:00 PM		Clock Out	05:00 PM	2	4.00					
		÷				Rounded	05-00 PM	8.00	0.00	1.00			
				Nourided.	03.00 PP								

Reconcile Forecasted Hours

At the end of a pay period an employee's time card will show both the forecasted hours and the actual hours worked.

Time cards must be reconciled in order to pay employees' for what they actually worked instead of what they were expected or forecasted to work. An example of a day with both forecasted and actual hours worked is shown below.

	Wednesda	ay 1	0/15/2014								
~											
	2		Clock In	07:30 AM	6000/200/230	Begin Meal	12:00 PM		4.50		
			Begin Meal	12:00 PM	6000/200/230	End Meal	01:00 PM				1.00
	D 🔎 🔥		Work	01:00 PM	6000/200/230	Clock Out	05:45 PM		4.75		
								Shift:	9.25	0.00	1.00
			Clock In	08:00 AM		Begin Meal	12:00 PM	2	4.00		
			Begin Meal	12:00 PM		End Meal	01:00 PM	۵			1.00
			Work	01:00 PM		Clock Out	05:00 PM	۵.	4.00		
								Shift:	8.00	0.00	1.00
		- †						Total:	17.25	0.00	2.00
	Figure 126										

To reconcile the forecasted days, click on the Forecast tab, the Reconcile Forecasted Hours option will appear underneath the Forecast Hours. Click on the blue triangle next to the "Reconcile Forecasted Hours." The Reconcile screen will appear.

Forecast Hours									
* Reconcile Forcasted Hours									
1 Setup Red Select Employ	conciliation (2) Apply Reconciliation								
EE# *	Name			EE# ^	Name	Start Date:			
123123123	Chip, Lori								
234234234	Gassud, Jennifer					End Date:			
245364788	Chide, Bob					Enu Date:			
345678912	Paul, Peter		-						
456456456	Young, Lauren	U	$\langle =$			Date to apply adj	ustments to:		
567567567	James, Nolan								
678678678	Johnson, Nora	Ų							
678912345	Rosen, Annabel	÷.							
Unselected: 1	2			Selected: 0					
							Next		

Figure 127

Follow these steps to reconcile the time cards.

- 1. Select the employees whose hours should be reconciled.
- 2. Enter a Start Date.

NOTE: This date should be the same first day that you used when you forecasted the hours.

3. Enter an End Date.

NOTE: This date should be the last day of the pay period and it should be the same last day that you used when you forecasted the hours.

NOTE: You **cannot** delete forecasted hours once they are processed.

4. Enter in the date where you would like to see the reconciliation appear.

NOTE: You would want to use a date in the next pay period because that is when the reconciliations will be paid out.

NOTE: Selecting a date when employees do not work (the first Sunday of the next pay period, for example) makes it easier to see the reconciliations.

5. Click the Next button. A confirmation screen will appear as seen below.

Forecast Hours	
Reconcile Forcasted	Hours
3 Setup Reconciliation	App's Reconstitution
Rec	onciliation has been applied successfully.
	Figure 128

Understanding the Reconciled Entry

Once the pay period has been reconciled, the reconciled hours will appear in the next pay period as seen below.

	Saturday	10/25/2014								
▶		Reconciled P	12:00 AM	///			Total:	12.75	0.00	0.00
Tot	al Summary									
					F	Reconciled Pos	work:	2.50		
					R	econciled Neg	Work:	4.50		
						Reconciled Pos	s OT1:	5.75		
							Total	12.75	0.00	0.00

Figure 129

In this example, the hours would be explained as follows:

Reconciled POS work: These are regular work hours, which were worked but not forecasted. In other words these are hours worked in excess of the forecast.

Reconciled NEG work: These are hours, which were paid as regular hours but should have been paid as overtime. In some instances a Reconciled NEG work could also mean that an employee was paid for regular time but never worked those hours.

Reconciled POS OT1: These are hours that should be paid as overtime hours.

Points

The Points module is a management tool, which can track attendance infractions and issue electronic notices based on a company's policy. The Points module is not standard with the system and it must be purchased as an additional module.

\$ 89123	891234567 - Tyson, Rosalinda Total Points: 2.50											
*	Pay Pe	riod »		09/01/2014	- 10/12/2014 «	Week	»					
🕈 Add	Excuse	Date	Туре	Points	Exception Name	Non-Work	Note					
<i>₽</i>	2	10/07/2014	Atte	0.00(0.50)	Clock In - Very Late In (15 or		Bad accid					
₽ □		10/08/2014	Atte	0.50(2.00)	Absence - Clock In: 08:00 AM		1st time					
₽ □	2	10/09/2014	Atte	0.00(2.00)	Absence - Clock In: 08:00 AM							
đ		10/09/2014	Atte	4.50	Notice Written Warning Issued							
		10/10/2014	Atte	2.00(2.00)	Absence - Clock In: 08:00 AM							
		10/11/2014	Atte	4.50	Notice Written Warning Issued							

Figure 130

Understanding the Points Screen

The details of the screen are explained below.

Refresh/Reprocess Time Card button: This button appears to the left of the employee's name **a**.

Name: The name of the employee whose points are being viewed will be highlighted on the left in the employee list and it will also appear in bold black lettering at the top of the time card along with the employee's number.

Total Points: The total number of Points the employee has for the date range shown.

Change Date Range button predefined ranges: Past 1 Month, Past 3 Months, Past 6 Months, Past 9 Months and Past 1 Year.



Employee Scrolling Arrows: These buttons appear in the top right corner of the Time Card Screen. They are used to navigate back and forth from one employee to another within the Employee List.

Navigating Dates: Select the date range you would like to include in this view.

- Click on the Month button to see an entire month's worth of Exceptions. You can move to other months by using the arrow buttons to the left and right of the Month button.
- Enter in user-defined dates.
- Click on the Week button to see an entire week's worth of Exceptions. You can move to other weeks by using the arrow buttons to the left and right of the Week button.

The columns are described in the following table.

Add Points Button	This button will allow you to add or deduct any exceptions. It will be explained in more detail later in this section.
Excuse	This column allows a manager to excuse an exception, which may or may not lessen the points against that employee.
Date	The date of the exception.
Туре	This column refers to the group of occurrences associated with this exception.
Points	The number of points associated with the exception.
Exception Name	The name of the exception.
Notes	Any note entered in by the administrator or manager.

Functions within the Points Screen

Adding Points

1. Click on the Add button. The Add Points screen will appear.

Add Points	×
Points Type:	
Attendance Violations 😫	
Date:	
10/06/2014	
Points:	
Note:	
10	
🔊 Cancel 📄 Save	
Figure 132	

- 2. Enter in the Points Type or exception.
- 3. Enter in the date of the infraction.
- 4. Enter in the number of points this exception should carry.
- 5. Enter in any notes.
- Click the Save button. NOTE: The new entry will show as a "Manual Entry" under the Exception Name column.

Excusing Points

Excusing an exception allows the manager to take away points if the exception was understood and acceptable. The point adjustments are predetermined from the configurations. For example, if an employee clocked in extremely late, but you, as the manager, knew of an accident that prevented them from getting to work on time, you might excuse that tardy.

1. Click on the small box underneath the "Excuse" column associated with the exception you would like to excuse.

\$ 89123	4 567 - 1	Tyson, Ros	salinda		Total Poi		🦷 🦛 🗎	
«	Pa	ay Period	»	09/01/2014	4 - 10/11/2014 «	Week		»
🕈 Add	Excuse	Date	Туре	Points	Exception Name	Non-Work	Note	
		10/07/2014	Attendance Vi	0.50(0.50)	Clock In - Very Late In (15 or more mi			
		10/08/2014	Attendance Vi	2.00(2.00)	Absence - Clock In: 08:00 AM			
		10/09/2014	Attendance Vi	2.00(2.00)	Absence - Clock In: 08:00 AM			
٥		10/09/2014	Attendance Vi	4.50	Notice Written Warning Issued			

Figure 133

2. Enter a note.

Note	×
Note	
Bad accident on the 202. Called with plenty of notice	
🔊 Cancel 📊 Save	
E imme 404	

Figure 134

The exception will now show a checkmark as excused and the points will go down. In this screenshot the points automatically went down from .5 to 0.

🕈 Add	Excuse	Date	Туре	Points	Exception Name	Non-Work	Note	
₽ 🗆	ഷ്	10/07/2014	Attendance Vi	0.00(0.50)	Clock In - Very Late In (15 or more mi		Bad accident on th	
Figure 135								

NOTE: The number in the parenthesis represents the value of the original points.

Editing Points

Editing an exception gives the manager the control to add or subtract any number of points if the exception was understood. The points adjusted are not predetermined, as they are in the excusing of an exception. For example, if an employee was absent, but the manager felt their excuse was valid, then they might want to adjust the points, if permitted by company policy.

1. Click on the small pencil icon in the row associated with the exception you would like to edit.

• 🥖		10/08/2014	Attendance Vi	2.00(2.00)	Absence - Clock In: 08:00 AM			
Figure 136								

The Edit Points screen will appear.

Edit Points	×
Points Type:	
Attendance Violations 😫	
Date:	
10/08/2014	
Points:	
2	
Note:	
🔊 Cancel 🔲 Save	
Figure 137	

- 2. Enter in the date.
- 3. Enter in the number of points this exception should carry.
- 4. Enter in any notes.
- 5. Click the Save button.

₽ □		10/08/2014	Attendance Vi	0.50(2.00)	Absence - Clock In: 08:00 AM		1st time being absc	
Figure 138								

The exception will now show a checkmark as excused and the points will go down. In this screenshot the points went down from 2 to .50.

NOTE: The number in the parenthesis represents the value of the original points.

Acknowledging the Points

Acknowledging an exception is a way for a manager to stay on top of the attendance infractions for each employee.

Click on the small box underneath the "Add" button associated with the row or exception you would like to acknowledge.



The exception will now show a checkmark as acknowledged.

Acknowledging Notifications

Administrators can set-up the database to automatically send employees notifications when they reach a pre-specified number of points. Typically, a manager or a HR representative would discuss this notification with an employee. Acknowledging the notification shows that it was discussed with the employee.

Click on the small box underneath the "Add" button associated with the row or exception you would like to acknowledge. Once you have checked the box you will see a confirmation saying "Notification Discussed."

đ		10/09/2014		Atte	4.50	Notice Written Warning Issued	
Notifica	Notification Discussed		/2014	Atte	2.00(2.00)	Absence - Clock In: 08:00 AM	
			1				

Fi	ia	u	re	1	4	D
	' S	~				-

The notification will now show a checkmark as acknowledged.

Viewing the Points Audit Trails

The Audit Trails for the Points screen will show a history of any changes made to any point values. Below is an example and an explanation of an Audit Trail.

dit Tr	ails	Is								
Status	Date	Туре	Points	Is Excused	Is Notified	Note	Date/Time Changed	Change made by		
Add	10/06/2014	Attendance	0.50	False	False		10/09/2014 03:26 PM	ZZ_Train, Admin		
Update	10/06/2014	Attendance	0.50	False	False		10/09/2014 Jones, Kimb	Jones, Kimberly		
	10/06/2014	Attendance	0.00	True	False	Bad accident	03:55 PM			



Each "Status" will have two lines. The top line will be in blue and show how the entry began. The bottom line will show any changes made in red.

Status	The options will be "Add" or "Update." An "Add" is
	when something has been automatically or
	manually added. An "Update" is when a manager

	has altered the original entry.
Date	The date the "Add" or "Update" occurred.
Туре	The type of the exception.
Points	The number of points associated with the exception.
Is Excused	The options will be True or False. True means that it has been excused. False means it has not been excused.
Is Notified	The options will be True or False.
Note	Any note entered in by the administrator or manager.
Date/Time Changed	The specific date and time the change was made.
Change made by	There are 2 options: a system-generated entry will show as Administrator and a manager or other authorized employee will show by name.

Schedules Screen

The Schedules screen is used to manage each employee's schedule and provide the manager with a snapshot of any given day. It is broken down into sections - the Visual Scheduler and the Schedule Template tabs.



Schedules are created in the Schedule Template tab, but viewed and edited for any given employee in the Visual Scheduler.

Visual Scheduler Tab

The Visual Scheduler Tab provides the manager with a view of their employees' generated schedules for any 24-hour period. From this screen, the manager can view, create, edit or delete any schedule for that day.

Visual Schedule	r Sch	edu	le T	'em	plat	e																														-
Visual Scheduler																																				R
Date: 09/05/2014 🛞 💽						Time: 12:00 AM									Inc	Increments: 15 minutes \$							Previous Next Day Day													
Work					Break								Scheduled Time Off																							
		м	ear	_									ansi	rer											Uns	scne	au		me	UT I						
												0	9/05	5/20)14	- Fri	iday																			
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Chide, Bob	20									(
Chip, Lori	20																																			
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Pierce, Edwin	20									Ì	-	-			-	-		-	-																	
Rosen, Annabel	20											-	-				-	-	-																	
														Fi	gu	re	14	3																		

NOTE: In order to view schedules in the Visual Scheduler, schedules must first be added, assigned and generated from the Schedule Template tab

The top portion of the screen is a guide to explain what you are viewing down below.

Visual Scheduler	Schedule Template			- 2						
Visual Scheduler				R						
Date: 09/05	/2014 📵 🛐	Time: 12:00 AM	Increments: 15 minutes \$	Day Next Day						
	Work	Break	Sche	eduled Time Off						
	Meal	Transfer	Unsche	eduled Time Off						
Figure 144										

Manager Dashboard 72
Date: The day which is being displayed in the Visual Scheduler.

Refresh Button: Click this button to refresh the screen.

Coverage Button: Click this button for a view of the coverage for that period.

Time: The time which the Visual Scheduler will begin showing schedules. For example, if you were only concerned with the coverage on a given day between 1:00pm to 2:00pm you might change that time to 11:00am to see a more specific view.

Increments: Select either 15, 10, 5 or 1 minute(s) from the drop-down menu. The lower the number of minutes selected allows for greater control of schedules to the exact minutes.

Previous Day/Next Day: These buttons allow you to navigate from one day to the next.

Shift legend: The 6 shift types (Work, Meal, Break, Transfer, Scheduled Time Off and Unscheduled Time Off) are denoted by color.

NOTE: The Scheduled Time Off and Unscheduled Time Off cannot be entered manually. These are both automatically generated from the system.

Viewing Shift Details

1. To view the details of any shift, place your cursor on the shift for the individual and right-click. You will see a pop-up menu as shown below.

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Name		2a	1a	1	2a	3	а	4a	5 a	6	а	7a	8a	9 a	1	lOa	11	1a 1	2 p	1p	2p	Зр	- 4	p 5	p	6р	7p	8p	9 p	10)p 1	1p	12a :	1a	2a	3a	4a	5a	6 a	7	a	8a
Chide, Bob	20																											-														
Chip, Lori	20																				Add	d Break	ĸ																			
Dyde, Doug	20																			÷	Add	d Trans	fer																			
Gassud, Jennifer	20																			1	Cha	ange L	abor	r Level																		
Hernandez, Gustavo	20																			×	Del	ete Sh	ift																			
James, Nolan	20																				Viei	wshitt	Det	tails				-														
Johnson, Nora	20																			1	Dup	olicate olicate	shift shift	t on ani t for oth	ither er er	r day mplov	ee(s)															
Paul, Peter	20																																									



2. Click on the "View Shift Details" link. The Schedule Detail Information screen will appear.

Schedule I	Detail Inform	ation		•
Chide, Bo	b			
09/05/20	14 08:00 AM	- 05:00 P	м	
Туре	Date	Time	Labor Level	
Clock In	09/05/2014	08:00 AM	6000/700/750	
Transfer	09/05/2014	01:00 PM	6000/700/710	
Clock Out	09/05/2014	05:00 PM		
Work	5.00	5000/700/	750	
Work	4.00	5000/700/	710	
Work Total	9.00			
		×	Close	

Figure 146

3. Click the Close button when you are finished reviewing the schedule.

Editing a Start or End Time

- 1. Place your cursor on the green shift for the individual's schedule you would like to edit.
 - a. If the shift is the correct length of time, but has been entered with the incorrect start and end time, then click and drag the shift to the desired start and end time.



b. If the shift is not the correct length of time (too few hours or too many hours), then move your cursor until you see a side-pointing arrow at either end of the shift. Once you see the arrow, click and drag your cursor to the desired start or end time.

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2. The change will be saved automatically.

Adding a Break or Meal

- 1. To add a break or meal, place your cursor on the green shift for the individual's schedule.
- 2. Right-click on the shift where you want to add a break/meal. You will see a pop-up menu as shown below.

														09	/05	/2	014	1 - E	rida	iy 🗌																				
Name		2a	1a	2	a 3	3a	4a	5 a	6	a 7	7a	8a	9a	1	0a 1	l1a	12	p 1p	2 p	<mark>э Зр</mark>	4	p 5p	6	p 7	p 8	Bp	9p	10	p 11	lp 1	2a 1	a	2a	3a	4a	5 a	6	a	7a	8a
Chide, Bob	20																				-																			
Chip, Lori	20																		Ac	dd Brea dd Meal	¢																			
Dyde, Doug	20																	2	Ac	dd Tran	fer																			
Gassud, Jennifer	20																	N.) Cł	hange L	abor	Level																		
Hernandez, Gustavo	20																		De	elete Sh	ift																			
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Paul, Peter	20																	12						,	-/															



3. Click on the "Add Break" or "Add Meal" link.

NOTE: If the employee's payroll policy is not set up to have a break and/or meal or has an automatic break and/or meal, then that will not be an option and it will be grayed out.

- 4. Then drag your cursor to time you would like the break/meal to end. You will see a blue area where the break is to take place and a red area where the meal is to take place respectively.
 - a. To view the time of the break/meal, click on the red area.
 - b. To shift the time of the break/meal, click and drag the area to the desired time frame.

Adding a Transfer

- 1. To add a transfer, place your cursor on the green shift for the individual's schedule.
- 2. Right-click on the shift where you want to add a transfer. You will see a popup menu as shown below.

														09	/05	/20	014	l - F	rida	у																				
Name		2a :	1a	2a	1 3	Ba	4a	58	6	a 7	7a	8a	9a	1	.0a 1	L1a	12	p 1p	2p	3р	4	o 5	p e	ip 🗄	7p	8p	9p	1	Op 1 :	1p 1	2a 1	la	2a	3a	4a	5a	6a	78	a 8	3a
Chide, Bob	20																																							
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Hernandez, Gustavo	20																	2	De	lete SI	ift																			
James, Nolan	20																		Vie	sw Shit	t Deta	ils																		
Johnson, Nora	20																		Du	plicate	shift	on and	ther o	day																
Paul, Peter	20											C	-		-	-		-	Du	plicate	shift	for oth	er em	pioye	e(s)	1														
																Fi	gı	ure	e 1	50)																			

3. Click on the "Add Transfer" link. The Labor Level Override screen will appear.

Division:Department:Job:6000 - Scottsdale\$200 - Accounting\$210 - AR\$	×
Cancel Save	



- 4. Fill in the appropriate labor levels.
- 5. Click the Save button. The transfer time will appear as a yellow line.

Changing Labor Levels

1. Place your cursor on the yellow transfer line for the individual's schedule and right-click. You will see a pop-up menu as shown below.

														09	/05	5/2	014	- Fi	iday	1																				
Name		2a	1a	28	а	3a	4 a	5	a	6a	7a	8a	9a	1	0a :	11a	12	o 1p	2p	Зр	4p	5 p	6	o 7	8	9	9p	10p	11	p 12	2a 1a	a 2	la i	3a	4a	5a	6a	7a	8	a
Chide, Bob	30																								_															
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Dyde, Doug	20											ſ						4	Add	Trans	for																			
Gassud, Jennifer	30											C						×	Cha	inge L	abor l	.evel																		
Hernandez, Gustavo	30																	2	Del	ete Sh	ft																			
James, Nolan	30																		Vie	w Shift	Deta	ils			-															
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Paul, Peter	30											C						_6	Du	Notito	and a		e emp	ioyee(<u> </u>															
																Fi	qι	ire	1	52																				

2. Click on the "Change Labor Level" link. The Labor Level Override screen will appear.

Labor Level Override		×
Division: 6000 - Scottsdale 🗘	Department: 200 - Accounting	Job: 210 - AR \$
	🔊 Cancel 🕞 Save	
	Figure 153	

- 3. Fill in the appropriate labor levels.
- 4. Click the save button. The updated transfer information will be saved.

Deleting a Shift

- 1. Place your cursor on the green shift for the individual's schedule you would like to edit.
- 2. Right-click on the shift where you want to add a break/meal. You will see a pop-up menu as shown below.

														09,	/05,	/20	14 -	- Fri	iday																				
Name		2a	1a	2a	a S	3a	4a	5a	6	a 7	а	8a	9a	10	0a 1	1a 1	12p	1p	2p	Зр	4p	5 p	6 p	7 p	8	9	р	10p	11p	12	a 1a	2a	3a	4	a 5	a (ia	7a	8a
Chide, Bob	30																								_														
Chip, Lori	20																	1	Add	Break																			
Dyde, Doug	20																	÷	Add	Trans	er																		
Gassud, Jennifer	30																	S	Cha	nge La	bor L	evel			-														
Hernandez, Gustavo	30																	×	Dele	te Shi	t																		
James, Nolan	80																	2	View	v Shift	Detail	s			-														
Johnson, Nora	20																		Dup	licate s licate s	hift o	n anoti or other	ner da remnl	y ovee(s															
Paul, Peter	30																		bup				- Children	0,00(0	-														
																ES.		-	4.6	- A -																			

Figure 154

3. Click on the "Delete Shift" link. The shift will be deleted from the schedule.

Copying a Shift from Day to Day

1. Place your cursor on the shift you wish to copy and right-click. You will see a pop-up menu as shown below.

						(09/0	05/	201	4 -	Frida	iy																		0)9/	06/	201	4 - :	Satı
Name		a	6a	7a	8 a	9a	10	a 11	la 12	2p 1	p 2	p 3	o 4	p 5	p 6	p 7	8 p	9p	10	p 11	12 a	1a	2a	3a	4a	5a	6a	7a	8a	9a	1	0a 1	1a :	12p	1p
Chide, Bob	20																																		
Chip, Lori	20											Ŧ	Vaa Bi Vdd M	eal																					
Dyde, Doug	20											÷,	\dd Tr	ansfer																					
Gassud, Jennifer	20											§	Chang	e Labo	r Leve	1																			
Hernandez, Gustavo	30											×	Delete	Shift																					
James, Nolan	20												new a	min De	ans			_																	
Johnson, Nora	20												Duplica Duplica	ate shif ate shif	t on ai t for o	her em	ay bloyee	s)																	
														Fic	1111	e 1	55																		

2. Click on the "Duplicate shift on another day" link. The Duplicate this Shift screen will appear.



Figure 156

3. Select the day where the schedule should be copied.

NOTE: The current date will appear in a gray box while the date to be copied to will show as a blue box.

4. Click the Save button.

Copying a Shift from One Employee to Another

1. Place your cursor on the shift you wish to copy and right-click. You will see a pop-up menu as shown below.

						09/0	5/20	14 -	Frida	y																	0	9/0	6/2	014	- Satu
Name	ia	6 a	7a	8 a	9a	10a	11a :	12p 1	1p 2	o 3)	p 4	p 5p	6р	7p	8p 9	p 1(0p 11j	12 a	1a	2a	3a	4a	5a	6 a	7a	8a	9a	10	a 11	a 12	2p 1p
Chide, Bob	30															~															
Chip, Lori	30									Ť	Add	Break																			
Dyde, Doug	30									÷	Add	Transfer	r																		
Gassud, Jennifer	20									5	Cha	inge Labi	or Leve			-															
Hernandez, Gustavo	20									×	Dele	ete Shift																			
James, Nolan	20										Viev	w Shift De	etails			-															
Johnson, Nora	20				-						Dup	olicate shi	ift on ar	other d	ay																
	-									10	Dup	nicate shi	III IOF OL	ner em	bloyee(s)																
												Fíg	ure	9 1 5	57																

2. Click on the "Duplicate shift for other employee(s)" link. The Duplicate Shift for Additional Employees screen will appear.

Duplicate Shift for Additional Employees ×
Select Employee(s)
Unselected: Chide, Bob Chip, Lori Dyde, Doug Gassud, Jennifer Hermandez, Gustavo James, Nolan Johnson, Nora Paul, Peter Pierce, Edwin Rosen, Annabel Tyson, Rosalinda
Select dates(s)
Ø Monday □ Saturday Ø Tuesday □ Sunday Ø Wednesday Ø Thursday Ø Friday
Cancel Save

- 3. Double-click on the names of the employees who should receive this shift. They should move from the Unselected to the Selected box.
- 4. Select the date(s) by either entering in a date range or selecting dates from a calendar
 - a. If entering a date range, you will need to select the range and then select which day(s) within that date range that the copy should occur.
 - b. If entering in the dates by the calendar, then you will just click on the days you would like to copy to occur.

Duplicate Shift	for A	ddit	iona	l Emj	ploye	es			×
Select Employe	e(s)								
Unselected:				1	Selec	ted:			
Chide, Bob					Chip,	Lori	nnifo		
Hernandez, Gusta	avo				Paul,	Peter			
James, Nolan				-					
Pierce, Edwin				-					
Rosen, Annabel				-					
Young, Lauren									
.									
Select dates(s)									
ODate range									
• Calendar Vi	ew								
		Sep		\$ 2	014	¢	-0		
	Su	Мо	Tu	We	Th	Fr	Sa		
		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						
	-	•							
		Can	icel			ave			
		- F	-ίαι	ure '	159				

NOTE: The dates selected will appear as highlighted squares.

5. Click the Save button.

Schedule Template Tab

The Schedule Template is a management tool with the ability to create templates for reoccurring schedules in order to save time for managers. Templates are typically created when the same schedule is used week after week or by more than one employee.

Visual Scheduler	Schedule	Template					-9
Template List	0	Schedule Template					
Template Name 🔺	No of Emp		Generate Now	🖉 Edit Template	lete Template	Assign Employees	
11-7 Begins Sun night	0		. Generate How			Assign Employees	
3-11 M-F	0	Template Name	: 8-5 M-F	No Of Days: 7	1	Reference date: 05/04/2014	
7 to 3 M-F	0			=:		•	
8-5 M-F	17	Auto-Generate	a thru: 09/14/2014	Time: 08	:00 AM	Increments: 15 Minutes \$	
			Work	Break	Meal	Transfer	
		Days	2a 1a 2a 3a 4a 5a	6a 7a 8a 9a 10a 11a 12p	1p 2p 3p 4p 5p 6	ip 7p 8p 9p 10p11p12a	
		Day 1 (Sunday)					
		Day 2 (Monday)					
		Day 3 (Tuesday)					
		Day 4 (Wednesday)					
		Day 5 (Thursday)					
		Day 6 (Friday)					
		Day 7 (Saturday)					

Figure 160

The screen is broken up into 2 sections: the Template List and the Schedule Template. The Schedule Template section shows the details of the template, which has been highlighted or selected from the Template List.

A template is designed to make a manager's job easier. There is no limit to the number of templates a manager can create, nor is there a restriction as to why the templates are created. Some managers might create one schedule for each shift, while another manager might create schedules for individual employees.

Creating a New Template

- Click on the Add New Template Button in the Template List section
 Template List
 the Create Template Screen will appear as pictured
 - below.

	Template Name:			
	No Of Days:			
	Reference date:			
	Auto generate:			
	Generate at:			
		(GMT-	05:00) Ea	stern Time
Overri	de auto generated:			
Override	manually created:			
	🔊 Cancel		Save	

- 2. Enter in a name for this new template.
- 3. Enter the number of days to be included in this template, including days off.

NOTE: Often this number will be 7 or multiples of 7 (5 working days and 2 days off), however it can be any length.

4. Enter in a date for when this template should begin.

NOTE: Most often this date will be the beginning of your workweek. For example, if your week begins on a Sunday, you would select the first Sunday you would like to see this template begin. Or you are in the middle of your workweek, then you would select the previous Sunday.

- 5. Check the "Auto generate" box, if you would like the system to automatically generate the schedules week after week.
 - a. Enter in the time when you would like the schedule to generate.
- 6. Check the "Override auto generated" if you want this schedule to override any previously auto generated schedules.
- 7. Check the "Override manually created" if you would like this template to override any edits or changes made to an employee's schedule.

NOTE: This will erase any manual edits or changes made to any specific day.

Create Template	×
Template Name: 3 to 11 M-F	
No Of Days: 7	
Reference date: 08/31/2014	
Auto generate: 🗹	
Generate at: 02:00 AM	
(GMT-05:00) Eastern Time	
Override auto generated: 🗹	
Override manually created:	
🔊 Cancel 🗖 Save	

Figure 162

8. Click Save to add this to the Template List. The newly added template will appear highlighted in the Template List section as shown below.

Template List	Ð
Template Name 🔺	No of Emp
11-7 Begins Sun night	0
3 to 11 M-F	0
7 to 3 M-F	0
8-5 M-F	18
PT M,W,F 9-2	1
Figure 16	3

Now it is time to create the shifts within this schedule.

9. Look to the right side of the screen or the Schedule Template Screen. The template name highlighted under the Template List will also appear on the Schedule Template screen as seen below.

Schedule Template																									
P Gen	erat	e No	w		1	Edit 1	ſempl	late		8	Del	ete To	emp	late			Ass	ign E	mplo	yees					
Template Name: 3 to	11	M-	F					No	Of I	Days	: 7				R	lefer	renc	e da	te: 0	8/3	1/20)14			
Auto-Generated thr	u: 1	N/A							1	Time	80	00 AN	И			I	ncre	men	ts:	15 M	linute	s 🛊			
	Wo	rk					Bre	ak					M	leal				т	rans	fer					
Days	.2a	1a	2a	38	4a	5a	6a	7a	8a	9a	10	a 11a	a 12	p 1p	2p	Зр	4p	5p	6р	7p	8p	9p	10	p 11	.p 1
Day 1 (Sunday)																									
Day 2 (Monday)																									
Day 3 (Tuesday)																									
Day 4 (Wednesday)																									
Day 5 (Thursday)																									
Day 6 (Friday)																									
Day 7 (Saturday)																									

Figure 164

- a. Place your cursor on the line corresponding to the correct day and time you would like a shift to begin. You will see a pop-up window of the time the shift is to begin.
- b. Then drag your cursor to time you would like your shift to end.
- c. Release the drag and you will see a solid green line representing the work shift for that day.

Schedule Template																									
P Ge	nera	te No	w			/ E	dit T	emp	late		8	Del	ete 1	emp	olate			Ass	ign E	mplo	yees				
Template Name: 3 t	o 11	м-	F						No	Of	Days	: 7				F	lefei	renc	e da	te: 0	8/3	1/20	14		
Auto-Generated th	ru:	N/A									lime	•• 01	00 P	М			I	ncre	men	ts:	15 M	inutes	\$		
	Wo	rk						Bre	ak					N	1eal				Т	rans	fer				
Days	.2a	ı 1a	2	a 3	3a	4a	5a	6a	7a	8a	9a	10	a 11	a 12	2p 1p	o 2p	Зр	4p	5p	6р	7p	8p	9p	10	o 11p 1
Day 1 (Sunday)																									
Day 2 (Monday)																	C								
Day 3 (Tuesday)																									
Day 4 (Wednesday)																									
Day 5 (Thursday)																									
Day 6 (Friday)																									
Day 7 (Saturday)																									



- i. If the shift is the correct length of time, but has been entered with the incorrect start and end time, then click and drag the shift to the desired start and end time.
- ii. If the shift is not the correct length of time (too few hours or too many hours), then move your cursor until you see a sidepointing arrow at either end of the shift. Once you see the arrow, click and drag your cursor to the desired start or end time.
- 10. Repeat Step 9 until all of the shifts have been added to this template.



Figure 166

NOTE: The shifts are saved automatically.

Adding Meals to a Template

1. Right-click on the shift where you want to add a meal. You will see a pop-up menu as shown below.

Days	.2a	1	a	2	а	3a	4a	5 a	• 6	5a	7a	8	a	9a	10	a	11a	12	o 1p	2	þ	3р	4p	5p	6р	7	7p	8p	9p	10p	11	p 12
Day 1 (Sunday)																																
Day 2 (Monday)																											Ade	d Brea	nk			
Day 3 (Tuesday)																										÷	Add	d Mea	I			
Day 4 (Wednesday)																										╬	Add	d Tran	nsfer			
Day 5 (Thursday)																										S) •	Chi	ange l Ioto St	Labor	Level		
Day 6 (Friday)																										õ	Vie	w Shif	ft Deta	ils		
Day 7 (Saturday)																																



- 2. Click on the "Add Meal" link.
- 3. Then drag your cursor to time you would like the meal to end. You will see a red area where the meal is to take place.

Days	.2	a 1	la	2	a	3a	47	a	5a	6a	7a	8	Ba	9a	10	a 11	la :	12p	1р	20	3p	4р	5p	6	р	7p	8p	9p	1	Op 1	11p	12
Day 1 (Sunday)																																T
Day 2 (Monday)																																
Day 3 (Tuesday)																																
Day 4 (Wednesday)																																
Day 5 (Thursday)																																
Day 6 (Friday)																																
Day 7 (Saturday)																																
												Fi	qu	re	168	3																

- a. To view the time of the meal, click on the red area.
- b. To shift the time of the meal, click and drag the area to the desired time frame.
- 4. Repeat Step 1-3 until all of the meals are added.

Adding Breaks to a Template

1. Right-click on the shift where you want to add a break. You will see a pop-up menu as shown below.

Days	.2a	1	a	2a	3	а	4a	5a	a 6	ia	7a	8a	9a	1)a :	11a	12p	1p	2p	Зр	4p	5 p	6	p 7	'p	8p	9p	10p	11p) 12
Day 1 (Sunday)																														
Day 2 (Monday)																											4			
Day 3 (Tuesday)																						4		dd Bre dd Me	ak al		-			
Day 4 (Wednesday)																						4	A	dd Tra	insfe	er	_			
Day 5 (Thursday)																						Ň] 0	hange	Lab	or Lev	vel			
Day 6 (Friday)																							s d D v	elete (iew Sh	Shift hift D	etails				
Day 7 (Saturday)																											ſ			
												lia	Iro	10	0															



- 2. Click on the "Add Break" link.
- 3. Then drag your cursor to time you would like the break to end. You will see a blue area where the break is to take place.



- a. To view the time of the break, click on the blue area.
- b. To shift the time of the break, click and drag the area to the desired time frame.
- 4. Repeat Steps 1-3 until all of the breaks are added.

Adding Transfers to a Template

1. Right-click on the shift where you want to add a Transfer. You will see a popup menu as shown below.

Days	.2a	1a	2	3a	4a	5 a	6	a	7a	8a	9a	10a	11a	12	p 1p	2p	Зр	4р	5p	6р	7p	8p	9p	10p	11p 12
Day 1 (Sunday)																									
Day 2 (Monday)																	E								
Day 3 (Tuesday)																	E						Add	Break	
Day 4 (Wednesday)																	Ē						Add	Transfe	r
Day 5 (Thursday)																	Ē					5	Char	nge Lab	or Level
Day 6 (Friday)																	F					×	Dele	te Shift	
Day 7 (Saturday)																							View	Shin De	etaiis



2. Click on the "Add Transfer" link. The Labor Level Override screen will appear.

Labor Level Override		×
Division: 6000 - Scottsdale 🗘	Department: 200 - Accounting	Job: 210 - AR \$
	🔊 Cancel 📊 Save	

Figure 172

- 3. Fill in the appropriate labor levels.
- 4. Click the save button. The transfer time will appear as a yellow line.



Figure 173

- a. To view the time of the transfer, click on the yellow area.
- b. To shift the time of the transfer, click and drag the area to the desired time frame.
- 5. Repeat Steps 1-3 until all of the transfers are added.

Assigning Employees to a Template

- 1. Select the template you would like to assign employees to from the Template List.
- 2. Click on the Assign Employees button ^{Assign Employees}. The Assign Employees screen will appear.

Assign Employees					×
Assigned to: 3 to 11 M-F	¢ □Includ	le future 🗹 Include una	ssigned	Filter by: 🎾	
Template: 3 to 11 M-F	From: 09/1	17/2014 To:		Search	
Employee 🔺	Emp No	Current Template	Begin	End	
0 selected / 0 record(s)			Select All	Select None	ave Save
		Figure 174			

3. Filter the employees by the top portion of the screen – and the Search box.

Assigned to: 3 to 11 M-F	🗘 🗆 Include future 🛽	Include unassigned	Filter by: 🎾
	Figure 175		

a. Select the "Assigned to" from the drop-down list.

NOTE: This menu can be used a filter. For example, if you want to switch everyone from one schedule to another, then you would want to select the name of the schedule to which they are all currently assigned. However, if you want to make random selections, you might select "Any" so all of your employees would appear. And if you just want to assign an employee to a schedule for the first time, you would select "Unassigned" so that only employees without a schedule would appear.

- b. Check the "Include future" box to include employees who are not assigned to the schedule for the current day but are assigned to that schedule in the future.
- c. Check the "Include unassigned" box to also include employees who are not yet assigned to a template.
- d. Use the "Filter by" to use a predefined filter or create a new one. See the Employee Filter section.
- e. Enter a name in the "Search" box
- 4. Verify the template selected is the template you are assigning.
- 5. Enter the date you would like the assignment to begin.
- 6. Enter the date you would like the assignment to end.
- 7. Select the name(s) of the employee(s) to be assigned to the selected schedule.
 - a. Click on the Select All link **Select All** at the bottom of the page to select all of the employees listed.
 - b. Click on the Select None link ^{⊘ Select None} at the bottom of the page to deselect all of the employees listed.
- 8. Click the Save button.

Generating Schedules

Once a schedule is created and assigned to the employees it must be generated. This can be done in one of two ways. One option is to set up the "Auto Generate" feature when creating the template. The second option is to use the "Generate Now" button from the Schedule Template screen. This section will explain the "Generate Now" button.

Typically, the "Generate Now" button is used if a schedule template has been changed and you want the schedule to reflect the changes made before the next auto generation. In addition, the same is true when a new employee is assigned to an existing template. Typically you would want to generate their schedule so they can begin working against a schedule immediately instead of waiting for the next automatic generation.

 Click on the Generate Now button ^{Generate Now}. The Generate Schedules Now screen will appear.

Generate Schedules Now	×
Start Date	
End Date	
🥟 Cancel 🕞 Generate	
Eigung 470	

Figure 176

- 2. Enter in the date you would like to see this schedule begin
- 3. Enter in the date you would like to see this schedule end.

NOTE: Check your template settings before Generating Now. If you have it set up to override any manual or auto generated schedules it will do so now.

4. Click the Generate button. The confirmation screen will appear.

Generate Schedules Now	×
Schedule generate item has been added to queue.	
Ok	
Figure 177	

5. Click the OK button.

Editing a Template

When you edit a template you follow the same steps as you do when creating a template.

1. Select the template you would like to edit from the Schedule Template List on the left.

- Refer back to the steps in the Creating a Template, Adding Meals to a Template, Adding Breaks to a Template and Adding Transfers to a Template sections.

Deleting a Template

A template can only be deleted if there are no employees assigned to it. Employees must be reassigned before the template can be deleted.

- 1. Select the template you would like to delete from the Schedule Template List on the left.
- 2. Click on the Delete Template button ^{O Delete Template}. The Confirm Delete screen will appear.
 - a. If there are no employees assigned to the template, click the Delete button. The template will be removed from the list.

Confirm Delete	×
Would you like to delete this template? Schedule Template - 11-7 Begins Sun night	
Cancel 🔀 Delete	
Figure 178	

b. If there are employees assigned to the template, the screen will have a red warning message as seen below.





Select another template from the drop-down menu and then click the Delete button. The employees will be assigned to the chosen template and the old template will be removed from the list.

NOTE: If all of the employees are not supposed to be reassigned to the same schedule, follow the instructions for Assigning Employees to a Schedule before attempting to delete the template.

Time Off Screen

The Time Off screen is used to manage the accruals and time off for your employees. It is broken down into 3 tabs: Requests, Adjustments & Balances.

Requests Tab

The Requests Tab is used to manage the requests from the employees for their time off. Employees submit their requests and it is up to you as a manager to approve or deny those requests based on coverage, accrual availability and your specific company policies.



Viewing & Replying to Messages

If you would like to send your employee a message or if you would like to see the breakdown of their request you may choose to see a more detailed view.

1. A yellow piece of paper icon 🦾 will appear under the EE# column if there is a message from the employee. To view the message, place your cursor on the icon and hover until the message appears.

12312	3123	Chip,	05/22/2014	Personal	05/27/2014	1
	Þ	LOFI	03:05 PM		08:00 AM	
67(<mark>SO</mark>	rry for	the short	notice – hopi	ng to have a	long weeker	nd 4
			Figure 18	1		

2. To see the details of the request or to reply to the message, click on the magnifying glass icon under the EE# column within the corresponding request item you wish to review. The Details screen will appear.

EE# Name Submitted Type Date/Time ^ Hours Balance Action Changed By Changed On 1231231 Chip, Lori 05/22/2014 05/22/2014 05/22/2014 8.00 96.92 Requested OB:00 AM Personal Time 05/22/2014 8.00 96.92 Requested OB:00 Pm Personal Time 05/22/2014 8.00 96.92 Requested Personal Time Personal Time Personal Time 95/29/2014 8.00 96.92 Requested Personal Time Personal T
1231231 Chip, Lori 05/22/2014 03:05 PM Personal Time 05/27/2014 08:00 AM 8.00 96.92 (98.46) Requested □ Approve 1231231 Chip 05/22/2014 Representation 8.00 96.92 Requested
1331231 Chin 05/22/2014 Percent Time 05/22/2014 8 00 96 02 Requested
Compy Concernence Concernence <t< td=""></t<>

Figure 182

- a. To send a message
 - i. Click on the message icon with the green addition sign sign the Manager Notes screen will appear.
 - ii. Type your note.

Manager	Notes	×
Not a prob	lem - have a great weekend.	
		lo
	Ok	
	Figure 183	

- iii. Click the OK button.
- b. To view the history
 - i. Click on the message icon with the clock . The History screen will appear.

Status Type	Changed On A	Changed By	Notes
Requested	05/22/2014	Chip, Lori	sorry for the short notice - hoping to have a long wee

ii. Click the Close button when you are finished reviewing the screen.

Calculating Projected Balances

Before approving an employee's time off request you may want to calculate the projected balance to be sure the employee will have enough time.

Click on the calculator icon under the Balance (Projected) column within the corresponding request item you wish to calculate. A number will appear in parenthesis, replacing the calculator icon, showing you the number of hours the employee will have available on the first day of their request.

EE#NameSubmittedTypeDate/TimeHoursBalance (projected)Action6786786Johnson, Nora05/17/2 03:27 PMPersona08/18/2 08:00 AM40.0046.15 (B6.15]Requested Approve Deny	Acti	ion Filter equested	06/02/20	014) - 08/2	22/2014 O	Filter By D Filter By D	oate Reques Date Submit	ited ted 🛞
6786786 Johnson, 05/17/2 Persona 08/18/2 40.00 46.15 Requested	EE#	* Name	Submitted	Туре	Date/Time	Hours	Balance (projected)	Action
	678678	36 Johnson, Nora	05/17/2 03:27 PM	Persona	08/18/2 08:00 AM	40.00	46.15 [86.15]	Requested Approve Deny

Figure 185

Approving Time Off Requests

Check the box next to "Approve" under the "Actions" column. The request will disappear from the Requests tab and the newly approved time will appear on the calendar to the right of the approvals.



Figure 186

Denying Time Off Requests

Check the box next to "Deny" under the "Actions" column. The request will disappear from the Requests tab.

Notes to an Employee before Approving or Denying the Request

 Click on the magnifying glass icon under the EE# column within the corresponding request item you wish to calculate. The Details screen will appear.

- 2. Click on the message icon with the green addition sign 4, the Manager Notes screen will appear.
- 3. Type your note.
- 4. Click the Ok button.

NOTE: The employee will see a note from you on their Time Off Screen.

- a. You can check on the box next to the "Deny" in the "Actions" column. The request will disappear from the Requests tab.
- b. You can check on the box next to the "Approve" in the "Actions" column. The request will disappear from the Requests tab and the newly approved time will appear on the calendar to the right of the approvals.
- c. You can wait for a response from your employee.

Adjustments Tab

The Adjustments tab allows you to view the accrued time off an employee has earned and it also shows any adjustments, which have been manually entered. An adjustment is used when an administrator needs to manually add or remove time from an employee's time off balance.

Req	uests	Adjus	stments	Balanc	es						
EE# _	Last	First	2	Time Off Type:	Begin	Date:	End Date:	Time C	off Accruals:	Accruais	Start Date:
123123123	Chip	Lori		Personal Time Of		104/0044	40/04/0044	Marria		00 (00 (
234234234	Gassud	Jennifer			0	1/01/2014	12/3/1/2014	Houriy		09/09/.	2009
245364788	Chide	Bob									
345678912	Paul	Peter		Date	Accrued	Granted	Adj Type	Adjustment	Used	Balance	Notes
456456456	Young	Lauren		05/19/2014	2.31	2.31				123.08	
567567567	James	Nolan		05/26/2014	2.31	2.31				125.39	
678678678	Johnson	Nora		06/02/2014	2.31	2.31				119.70	
678912345	Rosen	Annabel		06/02/2014					8.00	117.39	
789789789	Hernandez	Gustavo		06/03/2014					8.00	111.70	
891234567	Tyson	Rosalinda		06/04/2014					8.00	103.70	
901901901	Dyde	Doug		06/05/2014					8.00	95.70	
912345678	Pierce	Edwin		06/06/2014					8.00	87.70	
				06/09/2014	2.31	2.31				90.00	
				06/16/2014	2.31	2.31				92.31	
				06/23/2014	2.31	2.31				98.62	
				06/28/2014			Manual Adjustment	4.00		102.62	addt'l PTO for Saturday t
				06/30/2014	2.31	2.31				104.93	
				07/07/2014	2.31	2.31				107.23	
				Total Records: 33							🛞 🔰 🔑 Hide Accrued



Time Off Type: Select the type from the drop-down menu - only one type can be shown at any one time. For example, if your company has Vacation, Sick Time, Bereavement and Training Time, only one of those can be viewed at a time.

Begin Date: Select the date on which you would like the data shown to begin.

End Date: Select the date on which you would like the data shown to end.

Time Off Accruals: This cannot be changed. It shows the employee's assigned accrual rule.

Accruals Start Date: This date cannot be changed. It shows the date on which the accruals began to accrue.

The columns are explained below.

Date	The date on which the balance changed.
Accrued	The amount of the accrual earned by the employee on the
	date listed.
Granted	The amount of the accrual given to the employee on the date
	listed. Example: An employee may have "accrued" 10 hours
	within the first 90-day probationary period, but the hours may
	not have been "granted" until the 91 st day.
Adjustment	A manual adjustment is any change made to the total number
Туре	of accrual hours entered by an administrator.
Adjustment	The number of hours added or deducted away for the manual
	adjustment. For example, an employee could be given hours
	for a training class taken offsite. Or they could have hours
	deducted if your company pays out vacation at the end of the
	year.
Used	The number of hours an employee has used or redeemed
	since the last date.
Balance	The number of hours an employee has available to use or
	redeem.
Notes	Any notes associated to an adjustment, entered by the
	administrator.

The buttons at the bottom allow you to update and modify the screen.

Refresh Grid Button: This button will update the screen with any recent changes.

Hide Accrued Button: This button will hide the Accrued column.

Balances Tab

The Balances Tab shows you a summary for each accrual type for each employee. This screen is a snapshot of what time off your employees have available.

Req	uests	Adjus	tments	Balances	;						
EE# 🔺	Last	First	R								
1231231	Chip	Lori	9	Time Off Accrua	als: Accruals	Start Date:	Project Balances T	'hru:			
2342342	Gassud	Jennifer		Hourly	09/09/20	09	10/20/2014				
2453647	Chide	Bob		-		0					
3456789	Paul	Peter		Type ^	Accrued	Granted	Adjustment	Used	Balance	Projected	
4564564	Young	Lauren	-	Comp Time			3.63		3.63	3.63	
5675675	James	Nolan		Personal Time Off	13.85	13.85			53.85	53.85	
6786786	Johnson	Nora									
6789123	Rosen	Annabel									
7897897	Hernandez	Gustavo									
8912345	Tyson	Rosalinda									
9019019	Dyde	Doug									
9123456	Pierce	Edwin									
			Т	Total Records: 2						8	
						Eiguro 199)				

Figure 188

Time Off Accruals: This field cannot be changed. This shows the accrual policy assigned to the employee selected.

Accruals Start Date: This date cannot be changed. It shows the date on which the accruals began to accrue.

Projected Balances Thru: By changing this date you can forecast any employee's balance. The forecasted balance will include any new accruals that will be earned and any approved time off that will be taken.

The columns are explained below.

Туре	The time off type(s) within the accrual policy assigned to the employee.
Accrued	The amount of the accrual earned by the employee to date.
Granted	The amount of the accrual given to the employee for the date listed.
Adjustment	The number of hours given or taken away as a manual adjustment.
Used	The number of hours an employee has used or redeemed since the last date.
Balance	The number of hours an employee has available to use or redeem.

Reports Screen

The Reports section gives the manager the ability to generate and view a variety of reports pertaining to their department.

There are 5 main sections in the Reports Screen: Standard Reports, Favorites, Shared Templates, Scheduled Reports and Generated Reports.

Reports				*Note: Reports older than 90 days will be automa	tically deleted
Standard Reports	~	Favorites	-	Generated Reports	
Employee Reports		🖈 Time Card		Delete Selected	Reports 💥
Closed Audit Report Detailed Schedules by Labor Level		Shared Templates	-	対 09/08/2014 10:35 AM - Time Card 対 09/02/2014 12:47 PM - Time Off Information	0 / 0 /
Employee Labor Level Assignments Employees Without Schedules Report Export Matrix Summary		Daily Report (ZZ_Train, Admin) Time Card (Jones, Kimberly)			
Failed Transactions Report		Scheduled Reports	~		
Status Board Report User Groups by Group Name Weekly Schedules Report		Hours Summary Report (09/14/2014 05:00 AM)			
Exception	▼				
Exceptions Summary Report					
Hours Paid	▼				
Approaching Weekly Overtime Report Daily Report Hours Summary Report Non Work Pay Type Summary Report Points Tracking Summary Report Time Card Time Card Audit Trail Time Card Not Approved Report Time Card Summary Report					~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
		Elaura 100			

Figure 189

Standard Reports

The Standard Reports include options for employees, exceptions, hours paid and job tracking reports.

Previewing a Report

Once selected, each report will have a brief description and a preview of what the report will look like once it has been generated.

- 1. Select a report from any of the Standard Reports
- 2. Read the brief description at the top of the Report Criteria Screen.



3. Click on the Preview button to see an example of how the report will appear once it has been generated.

ABC Company				Labor La	vel Assignme
123 Main St				11/30/	2012 - 12/13/2
Employee Name: Abbott James		D	nolovee Numbe	r: 463	
Department			inprogree internor		
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Admin	100	01/01/2012		\$0.00	\$0.0
Division Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Manufacturing	10	01/01/2012		\$0.00	\$0.0
Job1					
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
10010	10010	01/01/2012		\$0.00	\$0.0
Location	Code	Start Date	End Date	Pay Rate	Charge Rate
Arizona	AZ	01/01/2012	Line train	\$0.00	50.0
Employee Name: Acevedo, Brianna		D.	nolovee Numbe	r: 896	
Department		-			
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Admin	100	01/01/2012		\$0.00	\$0.0
Division Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Manufacturing	10	01/01/2012		\$0.00	\$0.0
Job1					
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
10010	10010	01/01/2012		\$0.00	\$0.0
Location					
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Arizona	A2	01/01/2012		\$0.00	\$0.0
Employee Name: Acosta, Bob		6	mployee Numbe	r: 519	
Department	Code	Start Date	East Date	Base Basta	Charges Bate
Admin	100	01/01/2012	Ling Links	\$0.00	S0.0
Division					
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Manufacturing	10	01/01/2012		\$0.00	\$0.0
Job1					
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
10010	10010	01/01/2012		\$0.00	\$0.0
Location					
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Artrona	A2	01/01/2012		\$0.00	\$0.0
Employee Name: Adams, Jen		6	nployee Numbe	r: 36	
Description	Code	Start Date	End Date	Pay Rate	Charge Rate
Admin	100	01/01/2012	Line Date	50.00	so /
	-20	unumeutz.		ag.00	\$0.0

Figure 191

Running the Report

There are the 4 steps for running a report:

- 1. Selecting a Report.
- 2. Filling out the report criteria.
- 3. Running the report.
- 4. Viewing the report.

This section will explain Steps 2 and 3 - how to set-up and run the reports. When you click on any given report you will be prompted with that specific report's criteria screen. Each one of those criteria screens will have 5 sections: Name, Filter & Sort, Report Options, Date Range and Generating the Report. Each of these sections is explained below.

Name Section

The Name section allows you to modify the name of the report for your personal use.

Name: Daily Report	Display Name as Title Share these settings as a Shared Template
🗹 Include Footer	

Figure 192

Name: The default name is the name of the Standard Report. You may rename this to whatever you choose (i.e. Todd Smith's Daily Report).

Include Footer: Check this box if you would like to see the filter, date and time for when this report was run.

Display Name as Title: Check this box if you would like to see your custom report name appear on the top right corner of the report versus the default name of the Standard Report.

Share these settings as a Shared Template: If this box is checked, then all of the managers with report capabilities will have access to this report with the saved settings. It will appear under the Shared Templates Dropdown Shared Templates

Filter & Sort Section

You have several options available in this section for filtering so that you can customize the results of the report.

Filter And Sort:		Order By:	Last Name Ascending	\$
Employee Filter:	\mathbb{R}	Format:	PDF	\$

Figure 193

Order By: Selecting from this drop-down menu dictates the order in which the report will print.

Format: Selecting from this drop-down menu dictates the format in which this report will be viewed. Excel, PDF, and PNG/TIFF are your choices.

Employee Filter: Clicking on the Filter Icon allows you to select which employees will be included in your report.

Filters X
Apply
Active Users 🖋
🔊 Clear Filter
🕂 Create New
🕂 Create New Custom Filter
Figure 194

NOTE: Use the Quick Filter to enter an employee's identifier, first name, middle name or last name and then click Apply.

If filters were previously created and saved, they will appear as a list of options as seen below.



To deselect any filters and revert back to including all active users in the report, click on the Clear Filter Button ^{Clear Filter}.

Creating a New Filter

1. Click on the Filter icon . The Filters screen will appear.

Filters	×
	Apply
🔊 Clear Filter	
🖶 Create New	
Figure 19	96

2. Click on Create New icon +. The Employee Filters screen will appear.

📡 Last N	lame	🎾 First Name	🎾 Badge Number	🎾 Employee Status	۶
	Chip	Lori		Active	
	Gassud	Jennifer		Active	
	Chide	Bob		Active	
	Paul	Peter		Active	
	Young	Lauren		Active	
	James	Nolan		Active	
	Johnson	Nora		Active	
	Rosen	Annabel		Active	
	Hernandez	Gustavo		Active	
	Tyson	Rosalinda		Active	
	Dyde	Doug		Active	
		Chip Chip Gassud Chide Paul Young James Johnson Rosen Hernandez Tyson Dyde	Chip Lori Chip Lori Gassud Jennifer Chide Bob Paul Peter Young Lauren James Nolan Johnson Nora Rosen Annabel Hernandez Gustavo Tyson Rosalinda Dyde Doug	Chip Lori Chip Lori Gassud Jennifer Chide Bob Chide Bob Paul Peter Young Lauren James Nolan Johnson Nora Rosen Annabel Hernandez Gustavo Tyson Rosalinda Dyde Doug	Chip Lori Active Chip Lori Active Gassud Jennifer Active Chide Bob Active Chide Bob Active Paul Peter Active Young Lauren Active James Nolan Active Johnson Nora Active Hernandez Gustavo Active Tyson Rosalinda Active Dyde Doug Active

3. Click on the Add a Field button Fields... The Choose Fields screen will appear.

Choose Fields			×
Unselected: Address 1 Address 2 City Email Middle Name Phone 1 Phone 2 Phone 3 Postal Code Start Date	•	Selected: Number Last Name First Name Badge Number Employee Status	1
	Cancel	Save	

- Figure 198
- 4. To add columns double-click on items in the "Unselected" box to move them into the "Selected" box. NOTE: You may also click on the item you wish to move into the "Selected" box by clicking once on the column title and then click on the right-facing arrow ➡.
- 5. To remove existing columns double-click on that title in the "Selected" box to move it into the "Unselected" box. NOTE: You may also click on the item you wish to move into the "Unselected" box by clicking once on the column title and then click on the left-facing arrow 4.

Below is an example of how the screen would look to filter by last name only.

Choose Fields		×
Unselected: Address 1 Address 2 Badge Number City Email Employee Status First Name Middle Name Number Phone 1	Selected:	1
	Cancel Save	



 Click the Save button when all of the columns you wish to view appear in the "Selected" box. Those will now be in view. NOTE: In this example only one filter was chosen. You may choose as many as you would like.

mployee Filter			
Fields 🎓 Open 🕞 Save	Save As	Search	
Last Name A			۶
	Chide		
	Chip		
	Dyde		
	Gassud		
	Hernandez		
	James		
	Johnson		
	Pierce		
	Rosen		
	Tyson		
Total Basandar 12			
Total Records: 12			

Figure 200

7. In this example, to filter within the "Last Name", click on Filter button corresponding to the "Last Name" which appears in the right-hand corner.

Last Name	Filter				
Only inclue	de:				
✓ A-H					
🖂 I-P					
	🗆 Q-Z				
L	Last Name Containing 💠				
	Clear	Apply			
Use or Example: 1	to separat l1 or 22 w	e multiple values ill search for 11 or 2	22		
Figure 201					

NOTE: Each filter criteria will look different because each filter will have its own specific filter screen.

8. Click the Apply button. In this example only the employees with last names beginning with A-H will be in view.

Fields 🍋 Open	Save	Save As		Search	
					5
Last Name A					冶
		Chi	de		
		Ch	ip		
		Dye	de		
		Gas	sud		
		Herna	ndez		
Total Records: 5					

Figure 202

- 9. Click the Save As button Save As... to save this filter.
- 10. Enter in the name of this new filter (i.e. Last Names A-H)



- 11. Check the box if you would like to share this filter with others.
- 12. Click the Save button. The new filter will now be saved in your filter list.

Report Options

Report Options will vary depending on the report selected. Contact your administrator or Technical Support with specific report questions.

Date Range and Generating the Report

The final sections of creating the report will allow you to choose a date range and when the report should process.

or semi-colon
or semi-colon
or semi-colon
or semi-colon
ence



Reference Payroll Policy: Pay periods are defined in Payroll Policies. Select a payroll policy, which corresponds with the pay period desired.

Date Range Choices: There are Five Date Range choices: Current, Previous, Next, Past, and User Defined. Each option gives you the flexibility to run your report within the parameters that you wish.

Email: Check the box to email directly to yourself or add additional email addresses in the box. Note that you can separate the emails with a comma or a semi-colon.

As soon as possible: Selecting this option and clicking the Run/Schedule Button will generate the report immediately.

NOTE: The larger the report, the longer it may take to generate.

At: Selecting this option allows you to schedule a report(s) for the **future** - at a specific time in a specific time zone. You must also choose the frequency for which this report will be generated.

Favorites

If you create a report and, after viewing it, realize that it is one that you would like to use or view again, then you can save it as a favorite report. A favorite can be made from the Generated Reports section.

Creating a Favorite

1. Look under the Generated Reports section. Any report with a gray star next to it can be added as a favorite.

Generated Reports	
Delete Selected	Reports 💥
🙀 09/08/2014 10:35 AM - Time Card	۵ 🦉
対 09/02/2014 12:47 PM - Time Off Information	ے 🖉 🕲

Figure 205

2. Click on the gray star corresponding to the report you would like to save as a favorite and it will appear in the Favorites section. It will have a corresponding yellow star in both areas.

Favorites	▼	Generated Reports
🖈 Time Card		Delete Selected Reports 💥
Shared Templates	▼	▼ 09/08/2014 10:35 AM - Time Card ♥ 09/02/2014 12:47 PM - Time Off Information ♥ □
		Figure 206

Removing a Favorite

1. Look in the Favorites section and click on any yellow star corresponding to a report you would like to remove from your Favorites list.



2. Click Yes when asked if you are you want to remove this from your favorites.



Figure 208

Shared Templates

Shared Templates are any templates, including yours, that once created and saved, were shared by you or with you. They are listed by the name of the report and show the name of the individual whom shared it.

Shared Templates	~
Daily Report (ZZ_Train, Admin) Time Card (Jones, Kimberly)	
Figure 209	

NOTE: Templates are shared when setting up the criteria to run the report.

Scheduled Reports

Scheduled Reports are any reports that are set up, but are scheduled to run in the future. These would include reports just scheduled to run once and also those scheduled to run on an ongoing basis (i.e. weekly).



Generated Reports

Generated Reports are reports that have already been run and are available to be viewed.

	*Note: Reports older than 90	days will be automa	tically deleted
Generated F	Reports		
		Delete Selected	Reports 💥
★ 09/08/20 ★ 09/02/20)14 10:35 AM - Time Card)14 12:47 PM - Time Off Info	rmation	

Figure 211

NOTE: Reports older than 90 days will be automatically deleted.

Viewing a Report

- 1. Click on the name of the report you wish to view. The report will appear in a separate window.
- 2. Close the window when you are finished reviewing the report.
 - NOTE: The report is still listed under Generated Reports after it has been viewed.

Editing the Report Criteria

- 1. Find the report you would like to edit.
- 2. Click on the edit button
- 3. Make any necessary changes to the Report Criteria screen and run the report as needed.

Renaming the Report Title

- 1. Find the report you would like to rename.
- 2. Click on the pencil icon 2.

Edit Report Title	×
Report Title: Time Card	
Cancel 🕞 Save	
Figure 212	

- 3. Rename the report.
- 4. Click the Save button.

Deleting a Report

- 1. Find the report you would like to delete.
- 2. Check the white box at the end of the row corresponding to the report you wish to delete.
- 3. Click the Delete Selected Reports button Delete Selected Reports X.

Ad-hoc Reports

Ad-hoc reporting allows a manager to create and customize a report that would not be available otherwise. Ad-hoc Reports is not standard and it must be purchased as an additional module.

If it has been purchased, the Ad-hoc Reports will appear in the top left portion of the Reports screen as pictured below.



Figure 213

Creating a New Ad-hoc Report without Conditions

1. Click on the Create New button **Create New** within the Ad-hoc reporting section.





The Ad-hoc screen will appear.

Reports				*Note: Reports older th	ian 90 days	will be au	tomatically	deleted
Ad-hoc Report								
Employee Profile Custom Fields Payroll Policy	Report Name:	urs in decimals	No condition>	Ø	Cancel		Save	-
Schedule	Preview (top 50 rows of 5000 most re-	cent records)	•			Disab	le auto r	refresh
Time Card	User ID Employee Identif	ier First Name	Last Name			0		
	23 245364788	Bob	Chide					
	22 901901901	Doug	Dyde					
	21 789789789	Gustavo	Hernandez					
	20 678678678	Nora	Johnson					
	19 567567567	Nolan	James					
	18 456456456	Lauren	Young					
	16 234234234	Jennifer	Gassud					
	15 123123123	Lori	Chip					
	14 912345678	Edwin	Pierce					
	13 891234567	Rosalinda	Tyson					
	11 678912345	Annabel	Rosen					
	8 345678912	Peter	Paul					
		Figure 2	15					

- 0
- 2. Enter in name for this new report in the "Report Name" box.
- 3. Select the fields you would like to see on this report from the 5 menus listed on the left.



a. Click on the Open button ^I for any of the 5 menus to display a list of fields for that topic. The menu will open to show a list of fields as shown below.

Employee Profile	
- User ID	8
- Employee Identifier	8
- First Name	8
- Middle Name	0
- Last Name	8
- Title	0
- Address 1	0
- Address 2	0
- City	0
- State	0
- Zip Code	0
- Phone 1	0
- Phone 2	0
- Phone 3	0
- Email	0
- Alert Email	0
- Badge	0
- Web Login	0
- Time Zone	0
- Restrict to Schedule	0
- Restrict Short Lunch	0
- Web Access	0
- Work Time Sheet Submit	0
- Non Work Time Sheet Submit	0
- Time Sheet Default Paid	0
- Track Attendance Only	0
- Time Sheet Submit	0
Figure 217	

- i. Fields with a red circle ⁶² denote fields, which are currently included in the ad-hoc report.
- ii. Fields with a green circle 🔮 denote fields, which are not include but can be available
- b. Select or deselect fields as needed. The columns to the right will increase or decrease respectively.

Reports					
Ad-hoc Report					
Employee Profile Custom Fields License Plate Emergency Contact #	0	Report Name: Emerg	gency Contact Numt	in decimals	≫ <no condition=""></no>
Payroll Policy Schedule Time Card		First Name Bob	Last Name	User ID 23	Emergency Contact : 724-275-8256
		Gustavo Nora Nolan	Hernandez Johnson James	21 20 19	412-400-3723 724-336-9834 412-781-9023
		Lauren Jennifer Lori	Young Gassud Chip	18 16 15	724-274-0022 412-963-9245 412-967-8080
		Edwin Rosalinda Annabel	Pierce Tyson Rosen	14 13 11	717-634-9873 412-310-6723 412-406-2345
		Peter	Paul	8	412-784-9977



- c. Repeat steps a & b as needed.
- 4. Check the "Share as a Template" box if you would like to share this report with everyone who has access to Ad-hoc reports.
- 5. Check the "Show hours in decimals" box if you would like to see any hours on the report shown as a decimal amount.
- 6. Check the "Disable auto refresh" box if you do not want to see the preview of the information that will appear in your report.
- 7. Click the Save button.

Creating an Ad-hoc Report with Conditions

1. Click on the Create New button **Create New** within the Ad-hoc reporting section.

Reports	
Ad-hoc Reports	Create New 🗢
Accounting EE List (ZZ_Train,	Admin)
Accounting EE List (Administ	rator, System) 🛛 🕹 🌡

rigaro 2

The Ad-hoc screen will appear.

Reports					*Note: Reports old	der th	an 90 days i	will be aut	omatically	v deleted
Ad-hoc Report										
 ■ Employee Profile ■ Custom Fields ■ Payroll Policy 	Report Name:	ate 🛛 Show hours	in decimals 🖇	<no condition=""></no>			Cancel		Save	-
Schedule	Preview (top 50 row	s of 5000 most recer	nt records)				(Disab	le auto i	refresh
Time Card	User ID	Employee Identifier	First Name	Last Name						
	23	245364788	Bob	Chide						
	22	901901901	Doug	Dyde						
	21	789789789	Gustavo	Hernandez						
	20	678678678	Nora	Johnson						
	19	567567567	Nolan	James						
	18	456456456	Lauren	Young						
	16	234234234	Jennifer	Gassud						
	15	123123123	Lori	Chip						
	14	912345678	Edwin	Pierce						
	13	891234567	Rosalinda	Tyson						
	11	678912345	Annabel	Rosen						
	8	345678912	Peter	Paul						



- 2. Enter in name for this new report in the "Report Name" box.
- 3. Select the fields you would like to see on this report from the 5 menus listed on the left.



a. Click on the Open button [■] for any of the 5 menus to display a list of fields for that topic. The menu will open to show a list of fields as shown below.

Employee Profile	
- User ID	8
- Employee Identifier	8
- First Name	8
- Middle Name	Õ
- Last Name	8
- Title	ē
- Address 1	Õ
- Address 2	ŏ
- City	ē
- State	ŏ
- Zip Code	ŏ
- Phone 1	ŏ
- Phone 2	ŏ
- Phone 3	ŏ
- Email	ŏ
- Alert Email	ŏ
- Badge	ŏ
- Web Login	ă
- Time Zone	ă
- Restrict to Schedule	ă
- Restrict Short Lunch	ă
- Web Access	ă
- Work Time Sheet Submit	ă
- Non Work Time Sheet Submit	ŏ
- Time Sheet Default Paid	-0
- Track Attendance Only	
- Time Sheet Submit	

- i. Fields with a red circle ⁶² denote fields, which are currently included in the ad-hoc report.
- ii. Fields with a green circle 🔮 denote fields, which are not include but can be available
- b. Select or deselect fields as needed. The columns to the right will increase or decrease respectively.
- c. Repeat steps a & b as needed.
- 4. Check the "Share as a Template" box if you would like to share this report with everyone who has access to Ad-hoc reports.
- 5. Check the "Show hours in decimals" box if you would like to see any hours on the report shown as a decimal amount.
- 6. Click on the No condition button [▶]<No condition></sup> to add additional parameters, which work as if/then statements.

Filters	×
⊙and ⊖or ♦ ♦	
User ID (Employee Profile)	



- a. Select "and" or "or"
 - i. Select "and" for the first parameter set and for any additional parameters you must have.
 - ii. Select "or" for any additional parameters you could have.
- b. Select the parenthesis from the drop down menus in increasing order. For example: Select the single before the double parenthesis.
- c. Select the field to use as your filter from the drop-down menu.
- d. Select the condition of this parameter.
- e. Enter in the value for the field.
 - i. Check the Case Sensitive box if the value is case sensitive.

f. Click on the Add button 🕈 . The condition will be added below as seen in the following screen shot.

Filters	×
and O or the Zone (Employee Profile) the Quals	🗆 Case sensitive 📫
✓ ¥ and Time Zone equals 'EST'	

Figure 224

- g. Repeat steps a-f to add additional parameters or conditions.
- h. Click the Save button.
- 7. Check the "Disable auto refresh" box if you do not want the system to update the items you are looking at when you add the criteria to the report.

NOTE: This can be helpful when you have a large account and you are trying to add 10 items one by one, the system loads each item. So, if you check the box you can add all 10 items and then uncheck the box and the system will only do 1 reload instead of 10.

8. Click the Save button.