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.
Manager Dashboard | 4

TIME CARD .................................................................................................................................................. 35
Understanding Time Card .......................................................................................................................... 36
Editing the Time Card ................................................................................................................................ 37
Expanding the View ......................................................................................................................................... 37
Editing a Missing Punch ............................................................................................................................... 37
Adding a Punch .............................................................................................................................................. 38
Adding a Work Shift ....................................................................................................................................... 38
Adding a Non-Work Shift ............................................................................................................................... 39
Deleting a Shift ............................................................................................................................................... 41
Refreshing the Time Card ............................................................................................................................... 43
Reprocessing the Time Card ........................................................................................................................... 44
Approving the Time Card ............................................................................................................................... 44
Approving the Time Card by Punch ................................................................................................................ 44
Approving the Time Card by Day ................................................................................................................ 45
Using the Mass Transaction Editor ............................................................................................................... 45
Adding a Punch with the Mass Transaction Editor ...................................................................................... 46
Adding a Work Shift with the Mass Transaction Editor ............................................................................... 47
Adding a Non-Work Shift with the Mass Transaction Editor ....................................................................... 49
Deleting a Punch with the Mass Transaction Editor ................................................................................... 51
PAY ADJUSTMENT ........................................................................................................................................ 52
Understanding the Pay Adjustments Screen ................................................................................................. 52
Details of the Pay Adjustments ....................................................................................................................... 54
Approvals ..................................................................................................................................................... 54
Notes ............................................................................................................................................................. 54
Details ........................................................................................................................................................... 54
TIME CARD APPROVALS .......................................................................................................................... 54
Step 1: Select Filter ......................................................................................................................................... 55
Step 2: Review Employee Approvals ........................................................................................................... 55
Filtering by Pie Graph ..................................................................................................................................... 56
Sending Reminder Messages to Employees ................................................................................................. 56
Refreshing the Approval Screen .................................................................................................................... 57
Step 3: Review Manager Approvals ............................................................................................................... 57
Filtering by Pie Graph ..................................................................................................................................... 57
Sending Reminder Messages to Managers .................................................................................................... 57
Refreshing the Approval Screen .................................................................................................................... 58
Step 4: Approve the Time Cards ..................................................................................................................... 58
Understanding the Approval Screen ............................................................................................................... 58
Configuring the Approval Screen ................................................................................................................. 59
Approving Time Cards from the Approval Screen ....................................................................................... 60
COMP TIME APPROVALS .......................................................................................................................... 60
Understanding the Comp Time Approvals Screen ...................................................................................... 60
Comp Time Filters ....................................................................................................................................... 60
Comp Time Approval Section ......................................................................................................................... 61
Managing Requests for Comp Time ............................................................................................................... 62
FORECAST .................................................................................................................................................... 62
Forecast Hours ............................................................................................................................................... 62
Reconcile Forecasted Hours ............................................................................................................................ 64
Understanding the Reconciled Entry ........................................................................................................... 65
POINTS .......................................................................................................................................................... 66
Understanding the Points Screen ................................................................................................................ 66
Functions within the Points Screen .............................................................................................................. 68
Adding Points ............................................................................................................................................... 68
Excusing Points ............................................................................................................................................ 68
Editing Points ............................................................................................................................................... 69
Acknowledging the Points ............................................................................................................................. 70
Acknowledging Notifications ....................................................................................................................... 70
Viewing the Points Audit Trails ..................................................................................................................... 70
SCHEDULES SCREEN ................................................................................................................. 72
  VISUAL SCHEDULER TAB........................................................................................................ 72
  Viewing Shift Details ............................................................................................................. 73
  Editing a Start or End Time ................................................................................................. 74
  Adding a Break or Meal ........................................................................................................ 74
  Adding a Transfer ................................................................................................................ 75
  Changing Labor Levels ........................................................................................................ 75
  Deleting a Shift .................................................................................................................... 76
  Copying a Shift from Day to Day ....................................................................................... 76
  Copying a Shift from One Employee to Another ............................................................... 77

SCHEDULE TEMPLATE TAB..................................................................................................... 78
  Creating a New Template .................................................................................................... 79
  Adding Meals to a Template ............................................................................................... 81
  Adding Breaks to a Template ............................................................................................ 82
  Adding Transfers to a Template ........................................................................................ 83
  Assigning Employees to a Template .................................................................................. 83
  Generating Schedules ........................................................................................................ 85
  Editing a Template ............................................................................................................. 85
  Deleting a Template ............................................................................................................ 86

TIME OFF SCREEN .................................................................................................................. 87
  REQUESTS TAB .................................................................................................................... 87
  Viewing & Replying to Messages ....................................................................................... 87
  Calculating Projected Balances ........................................................................................ 89
  Approving Time Off Requests .......................................................................................... 89
  Denying Time Off Requests .............................................................................................. 89
  Notes to an Employee before Approving or Denying the Request ..................................... 89

ADJUSTMENTS TAB ................................................................................................................ 90

BALANCES TAB ....................................................................................................................... 91

REPORTS SCREEN ...................................................................................................................... 93
  STANDARD REPORTS .......................................................................................................... 93
    Previewing a Report ........................................................................................................... 93
    Running the Report .......................................................................................................... 94
      Name Section .................................................................................................................. 94
      Filter & Sort Section ...................................................................................................... 95
      Creating a New Filter .................................................................................................... 96
      Report Options ............................................................................................................. 99
      Date Range and Generating the Report ....................................................................... 99

  FAVORITES .......................................................................................................................... 100
    Creating a Favorite ......................................................................................................... 100
    Removing a Favorite ...................................................................................................... 100

  SHARED TEMPLATES ......................................................................................................... 101

  SCHEDULED REPORTS ...................................................................................................... 101

  GENERATED REPORTS ...................................................................................................... 101
    Viewing a Report ............................................................................................................. 102
    Editing the Report Criteria ............................................................................................ 102
    Renaming the Report Title .............................................................................................. 102
    Deleting a Report ............................................................................................................ 102

  AD-HOC REPORTS ............................................................................................................. 102
    Creating a New Ad-hoc Report without Conditions ....................................................... 103
    Creating an Ad-hoc Report with Conditions .................................................................. 105
Manager Login

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

   ![Figure 1](image1)

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.

   ![Figure 2](image2)

   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.

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.
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 Form](image)

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=VVFH1TBBPT07L3NW

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.

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.

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.

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 to 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.

![Figure 10](image)

Your name and email will fill in automatically.

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

![Figure 11](image)

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.

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 🔄 to go to your management dashboard.
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.

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.

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.

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.
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.

<table>
<thead>
<tr>
<th>EE #</th>
<th>Name</th>
<th>Missing Type</th>
<th>Date</th>
<th>Add Type</th>
<th>Date</th>
<th>Time</th>
<th>Missing Punch Fix button</th>
<th>Total Records</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>James Jordan</td>
<td>Clock In</td>
<td>09/05/2014</td>
<td>Check In</td>
<td>09/05/2014</td>
<td>08:00 AM</td>
<td>Fix button</td>
<td></td>
</tr>
<tr>
<td>47093296</td>
<td>Johnson, John</td>
<td>Clock Out</td>
<td>09/05/2014</td>
<td>Check Out</td>
<td>09/05/2014</td>
<td>08:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>470958678</td>
<td>Johnson, John</td>
<td>Clock In</td>
<td>09/05/2014</td>
<td>Check In</td>
<td>09/05/2014</td>
<td>08:00 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>500134868</td>
<td>Ross, Emily</td>
<td>Clock Out</td>
<td>09/05/2014</td>
<td>Check Out</td>
<td>09/05/2014</td>
<td>08:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>470953245</td>
<td>Bacon, Ashley</td>
<td>Clock In</td>
<td>09/05/2014</td>
<td>Check In</td>
<td>09/05/2014</td>
<td>08:00 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>470953416</td>
<td>Young, Lauren</td>
<td>Clock Out</td>
<td>09/05/2014</td>
<td>Check Out</td>
<td>09/05/2014</td>
<td>08:00 PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
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 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.

![Configuration button : A tool used to sort the view of exceptions to your preference.](image)

**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.

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

2. 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.

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.

![Figure 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 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.

![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.
<table>
<thead>
<tr>
<th>EE#</th>
<th>The unique identifier for the employee with the alert.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the employee with the alert.</td>
</tr>
<tr>
<td>Date</td>
<td>The date the alert occurred.</td>
</tr>
<tr>
<td>Alert</td>
<td>The detail of the alert.</td>
</tr>
<tr>
<td>Delete button</td>
<td>Used to clear the alert from the screen.</td>
</tr>
<tr>
<td>Filter button</td>
<td>A tool to filter employees to show only a specific group.</td>
</tr>
<tr>
<td>Total Records</td>
<td>The total number of alerts for the date range selected.</td>
</tr>
</tbody>
</table>

**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.

![Figure 29](image)

**Messages**
The Messages icon ![Messages](image) 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).
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.

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.

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.
1. Click on the Filter icon on the top right corner of the Management Tool Board.
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.

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

   ![Figure 37]

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

   ![Figure 38]

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

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

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.
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.

![Figure 41](image1.png)

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.

![Figure 42](image2.png)

Figure 43
9. Click the Save As button to save this filter.
10. Enter in the name of this new filter (i.e. Last Names A-H)

![Figure 44](image)

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.

![Figure 45](image)

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

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.

![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.
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.

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.

   ![Figure 51](image1)

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.

   ![Figure 52](image2)

2. Click on the corresponding pencil icon 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.

   ![Figure 53](image3)

2. Click on the corresponding pencil icon 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.

   ![Figure 54](image4)
**Navigating Weeks**
Use the Summary Widget screen toolbar to navigate from one week to another.

- 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.

<table>
<thead>
<tr>
<th>Schedule Hours</th>
<th>The total number of hours scheduled for your group.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Hours</td>
<td>The total number of paid hours for your group.</td>
</tr>
<tr>
<td>OT Hours</td>
<td>The total number of overtime hours worked for your group.</td>
</tr>
<tr>
<td>Missing Punches</td>
<td>The total number of missing punches for your group.</td>
</tr>
</tbody>
</table>
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.

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.

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 in the top right corner of the screen.

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

<table>
<thead>
<tr>
<th>Profile Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee #</td>
<td>A unique number assigned to each employee. This number is used as the User ID for web logins</td>
</tr>
<tr>
<td>Badge #</td>
<td>A unique number given to employee for punching at a clock</td>
</tr>
<tr>
<td>Status</td>
<td>Active, Inactive, FMLA, Leave of absence or Terminated</td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Middle Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last Name</td>
</tr>
<tr>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>Start Date</td>
<td>The employee’s first day of employment</td>
</tr>
<tr>
<td>Manager</td>
<td>Name of the manager who will oversee the employee’s timecards</td>
</tr>
<tr>
<td>Time Zone</td>
<td>The time zone where the employee will punch from or where the employee resides.</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Contact Section</strong></td>
<td></td>
</tr>
<tr>
<td>Address 1</td>
<td>Primary address</td>
</tr>
<tr>
<td>Email</td>
<td>Primary email</td>
</tr>
<tr>
<td>Alert Email</td>
<td>Email used for Alert Module</td>
</tr>
<tr>
<td>Address 2</td>
<td>Secondary address</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
</tr>
<tr>
<td>State</td>
<td>State</td>
</tr>
<tr>
<td>Zip</td>
<td>Zip</td>
</tr>
<tr>
<td>Phone 1</td>
<td>Primary phone number</td>
</tr>
<tr>
<td>Phone 2</td>
<td>Secondary phone number</td>
</tr>
<tr>
<td>Phone 3</td>
<td>Additional phone number</td>
</tr>
</tbody>
</table>
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 , 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 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.

Figure 59

Figure 60
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.

*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.

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

![Figure 61](image)

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

![Figure 62](image)

The expanded view will appear.

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

![Figure 63](image)

**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.
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.

![Figure 64](image)

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.

![Figure 66](image)

The Add Punch screen will appear.

![Figure 67](image)
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 to enter in a shortcut note.

![Figure 68]

   e. Click the box to approve the punch.

![Figure 69]

   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.
The Add Work Shift screen will appear.

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 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.

   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.

![Figure 74](image)

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 pop-up list.

![Figure 75](image)

The Add Non-Work Shift screen will appear.
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 to enter in a shortcut note.
   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.

![Figure 79](image-url)

**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.

![Figure 80](image-url)

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 ✗ next to the part of the shift you would like to delete.

   The confirmation screen will appear.

![Figure 81](image-url)

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.

![Figure 82](image-url)
**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.

![Figure 83](image)

**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.

![Figure 84](image)

**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.

![Figure 85](image)

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

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.

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.
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.

4. 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.
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.

![Figure 92]

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 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.
4. Complete the shift section.

   Figure 93

   1. Complete the shift section.

   Figure 94

   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.
   f. Repeat steps a-d for the ending punch.
   g. If this punch should be entered for more than one day, enter the number of \textit{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.
   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.
   j. To add a meal
      1. Click on the Add Meal button. The Add Meal section will appear.
      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.

![Image of meal and break entry](Figure 96)

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.

![Image of labor level selection](Figure 97)

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.
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.

![Figure 98](image)

4. Complete the non-work shift section.

   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.
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.

   ![Figure 101](image)

4. Complete the delete section.

   ![Figure 102](image)

   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.

![Figure 103](image)

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 🍂.

*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.

<table>
<thead>
<tr>
<th>Date</th>
<th>The date of the adjustment.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The type of pay adjustment that was entered.</td>
</tr>
<tr>
<td>Units</td>
<td>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.</td>
</tr>
<tr>
<td>Rate</td>
<td>The dollar amount to be paid for every unit completed. Used for a multiplier adjustment.</td>
</tr>
<tr>
<td>Amount</td>
<td>The dollar amount being added or taken away.</td>
</tr>
<tr>
<td>Labor Level</td>
<td>The labor levels assigned to this adjustment.</td>
</tr>
<tr>
<td>Earnings</td>
<td>Amounts being added to the employee’s paycheck.</td>
</tr>
<tr>
<td>Deduction</td>
<td>Amounts being deducted from the employee’s paycheck.</td>
</tr>
<tr>
<td>Subtotals</td>
<td>Totals grouped together by adjustment type.</td>
</tr>
<tr>
<td>Total</td>
<td>Totals grouped together as Earnings or Deductions.</td>
</tr>
</tbody>
</table>
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.

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

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

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.
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.

![Figure 108](image)

*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.

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.
2. Select Message Employees. The Message screen will appear with a preconfigured message.
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 🔄.

**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.

![Pie Graph Example]

**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.
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 🔄.

**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.

(Figure 114)

*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.

Figure 115

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. The Configuration screen will appear.

![Configuration Screen](image)

Figure 116

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.
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.

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

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

<table>
<thead>
<tr>
<th>Approve All button</th>
<th>This button will approve all pending conversions listed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Button</td>
<td>This button will approve the conversion.</td>
</tr>
<tr>
<td>Denial Button</td>
<td>This button will deny the conversion.</td>
</tr>
<tr>
<td>Employee</td>
<td>The name of the employee requesting the conversion.</td>
</tr>
<tr>
<td>Total Available</td>
<td>This number refers to the total number of hours the employee has available to convert into Comp Time or to be paid out.</td>
</tr>
<tr>
<td>Payout Hours</td>
<td>This number refers to the number of hours, which will be paid with the employees regular hours worked.</td>
</tr>
<tr>
<td>To Bank Hours</td>
<td>This number refers to the number of hours, which have been banked for Comp Time.</td>
</tr>
<tr>
<td>Status</td>
<td>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</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Requested Date Range</th>
<th>The range of dates in which the requested Comp Time hours fall.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date/Time Submitted</td>
<td>The date and time the employee send the request.</td>
</tr>
<tr>
<td>Status Filter drop-down</td>
<td>Selecting one status from this drop-down menu will only show the group within one status.</td>
</tr>
<tr>
<td>Refresh Button</td>
<td>A button used to update the screen with any recent changes.</td>
</tr>
<tr>
<td>Employee Filter</td>
<td>The Filtering button allows you use specified criteria to only show a select group of employees.</td>
</tr>
</tbody>
</table>

**Managing Requests for Comp Time**
To approve ALL the pending conversions check the box next the Employee column header.

![Comp Time Approval](image)

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

To deny a Comp Time conversion request click on the Deny button ❌. Once the request has been denied the Deny button appears lighter ❌ 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.
Follow these steps to run the forecast.
1. Select the employees whose hours should be forecasted.

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

![Figure 125](image)

**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.

![Figure 126](image)

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.
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.

**Understanding the Reconciled Entry**

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

#### 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.

**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**: This button will quickly enter dates for 5 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.

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

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

![Figure 132](image)

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.
6. 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.

![Figure 133](image)

2. Enter a note.

![Figure 134](image)
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.

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.

The Edit Points screen will appear.

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.

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.

![Figure 139](image)

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.”

![Figure 140](image)

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.

![Figure 141](image)

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.

<table>
<thead>
<tr>
<th>Status</th>
<th>The options will be “Add” or “Update.” An “Add” is when something has been automatically or manually added. An “Update” is when a manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>has altered the original entry.</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>The date the “Add” or “Update” occurred.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of the exception.</td>
</tr>
<tr>
<td>Points</td>
<td>The number of points associated with the exception.</td>
</tr>
<tr>
<td>Is Excused</td>
<td>The options will be True or False. True means that it has been excused. False means it has not been excused.</td>
</tr>
<tr>
<td>Is Notified</td>
<td>The options will be True or False.</td>
</tr>
<tr>
<td>Note</td>
<td>Any note entered in by the administrator or manager.</td>
</tr>
<tr>
<td>Date/Time Changed</td>
<td>The specific date and time the change was made.</td>
</tr>
<tr>
<td>Change made by</td>
<td>There are 2 options: a system-generated entry will show as Administrator and a manager or other authorized employee will show by name.</td>
</tr>
</tbody>
</table>
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.

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.
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.

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

   ![Figure 147](image)

   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.

   ![Figure 148](image)

   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.

   ![Figure 149](image)
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 pop-up menu as shown below.

   ![Figure 150](image)

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

   ![Figure 151](image)

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.

   ![Figure 152](image)

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

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.

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

   ![Figure 157](image.png)

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

   ![Figure 158](image.png)

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.
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.

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

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.
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](image)

**Figure 163**

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](image)

**Figure 164**

- 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.
- Then drag your cursor to time you would like your shift to end.
- Release the drag and you will see a solid green line representing the work shift for that day.
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 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.

10. Repeat Step 9 until all of the shifts have been added to this template.

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.
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.

![Figure 168]

- To view the time of the meal, click on the red area.
- 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.

![Figure 169]

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.

![Figure 170]

- To view the time of the break, click on the blue area.
- 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 pop-up menu as shown below.

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

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

   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. The Assign Employees screen will appear.
3. Filter the employees by the top portion of the screen – and the Search box.

![Figure 175](image)

a. Select the “Assigned to” from the drop-down list.

NOTE: This menu can be used as 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 at the bottom of the page to select all of the employees listed.

   b. Click on the Select None link 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.

1. Click on the Generate Now button. The Generate Schedules Now screen will appear.

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.

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.
2. Click on the Edit Template button. The Create Template screen will appear. (Be sure the template you are editing appears as the Template Name.)

3. 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. 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](image1)

   **Figure 178**

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

   ![Confirm Delete](image2)

   **Figure 179**

   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.

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.
To send a message:

1. Click on the message icon with the green addition sign. The Manager Notes screen will appear.
2. Type your note.
3. Click the OK button.

To view the history:

1. Click on the message icon with the clock. The History screen will appear.
2. 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.

![Figure 185](image)

**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](image)

**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
1. 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 🍀, 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.

*Figure 187*

*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.
Manager Dashboard

<table>
<thead>
<tr>
<th>Date</th>
<th>The date on which the balance changed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accrued</td>
<td>The amount of the accrual earned by the employee on the date listed.</td>
</tr>
<tr>
<td>Granted</td>
<td>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 91st day.</td>
</tr>
<tr>
<td>Adjustment</td>
<td>A manual adjustment is any change made to the total number of accrual hours entered by an administrator.</td>
</tr>
<tr>
<td>Type</td>
<td>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.</td>
</tr>
<tr>
<td>Used</td>
<td>The number of hours an employee has used or redeemed since the last date.</td>
</tr>
<tr>
<td>Balance</td>
<td>The number of hours an employee has available to use or redeem.</td>
</tr>
<tr>
<td>Notes</td>
<td>Any notes associated to an adjustment, entered by the administrator.</td>
</tr>
</tbody>
</table>

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.

*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.

<table>
<thead>
<tr>
<th>Type</th>
<th>The time off type(s) within the accrual policy assigned to the employee.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accrued</td>
<td>The amount of the accrual earned by the employee to date.</td>
</tr>
<tr>
<td>Granted</td>
<td>The amount of the accrual given to the employee for the date listed.</td>
</tr>
<tr>
<td>Adjustment</td>
<td>The number of hours given or taken away as a manual adjustment.</td>
</tr>
<tr>
<td>Used</td>
<td>The number of hours an employee has used or redeemed since the last date.</td>
</tr>
<tr>
<td>Balance</td>
<td>The number of hours an employee has available to use or redeem.</td>
</tr>
</tbody>
</table>
**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.

![Figure 189](image)

**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.

![Employee Labor Level Assignments](image)

3. Click on the Preview button to see an example of how the report will appear once it has been generated.
Running the Report
There are the 4 steps for running 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

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 in the Reports section.

Filter & Sort Section

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

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.

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.

Creating a New Filter

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

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

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

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

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.
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.

![Figure 200](image)

**Figure 200**

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

![Figure 201](image)

**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.

![Figure 202](image)

**Figure 202**
9. Click the Save As button to save this filter.
10. Enter in the name of this new filter (i.e. Last Names A-H)

![Image of Save Current Filter dialog box]

Figure 203

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.

![Image of Date Range and Generate Report settings]

Figure 204

*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]

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]

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.

**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.

**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 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.
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.

**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.
Creating a New Ad-hoc Report without Conditions

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

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.

i. Fields with a red circle denote fields, which are currently included in the ad-hoc report.

ii. Fields with a green circle denote fields, which are not included 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. 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 within the Ad-hoc reporting section.

   ![](image1)

   The Ad-hoc screen will appear.

   ![](image2)

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.

   ![](image3)

   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.
i. Fields with a red circle 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 to add additional parameters, which work as if/then statements.

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.

![Figure 224]

- Click on the Add button.

- The condition will be added below as seen in the following screen shot.

- Repeat steps a-f to add additional parameters or conditions.

- 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.