Manager Training Package

Goal: To accurately and efficiently manage employees' time

Table of Contents

Pre-Payroll Processing Checklist

Managers and Timekeepers will need to review and approve employee hours and outstanding exceptions before payroll processing can begin. All employee time records must be approved by **Monday at 10:00 AM.**

- ☐ Reviewing pay period time segments for errors
  - ☐ Reviewing Time Segments
- ☐ Managing Time/Making Corrections to Employee Time Segments
  - ☐ Adding segments
  - ☐ Editing segments
  - ☐ Deleting segments
- ☐ Managing Exceptions
  - ☐ Manager Approval
  - ☐ Missed Punches
  - ☐ Overtime
  - ☐ Conflicting Shifts
- ☐ Managing Missed Punches
  - ☐ Edit and Verify Missed Punches
- ☐ Approving Exceptions/Approve Hours
  - ☐ Manager Approval
  - ☐ Missed Punches
  - ☐ Overtime
  - ☐ Conflicting Shifts

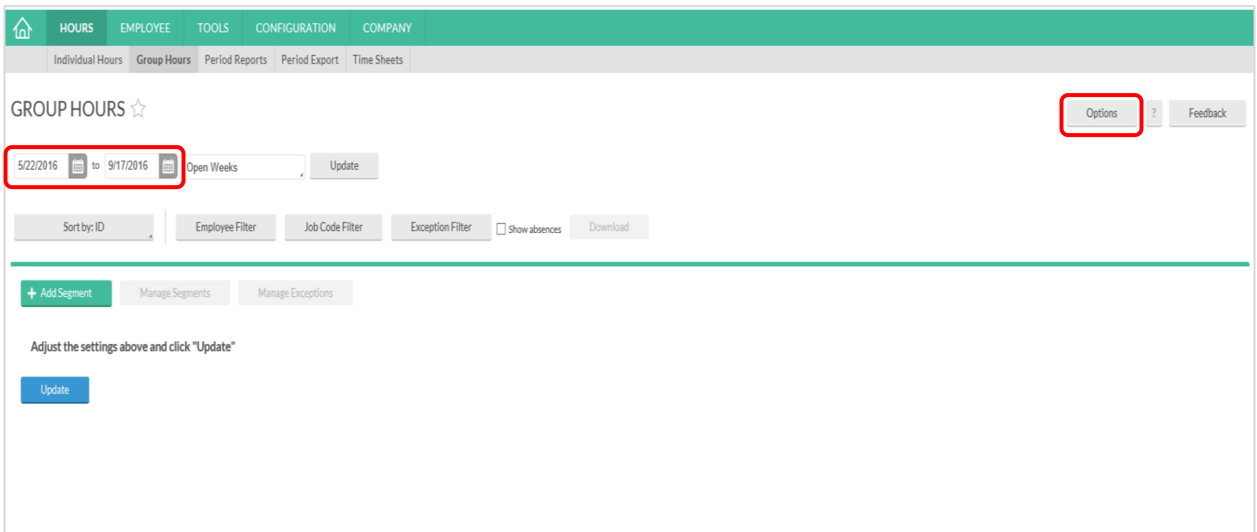
Reviewing Time:

The purpose of reviewing time is to identify any errors in employees' worked hours during the period.

Viewing Employee Time:

Log into TimeClock Manager

1. Click on **Hours** > **Group Hours**
2. Set your Date Range to the **Current Pay Period** and click **Update**.
3. You can set your default date selection to your pay period by clicking on the **Options** button.



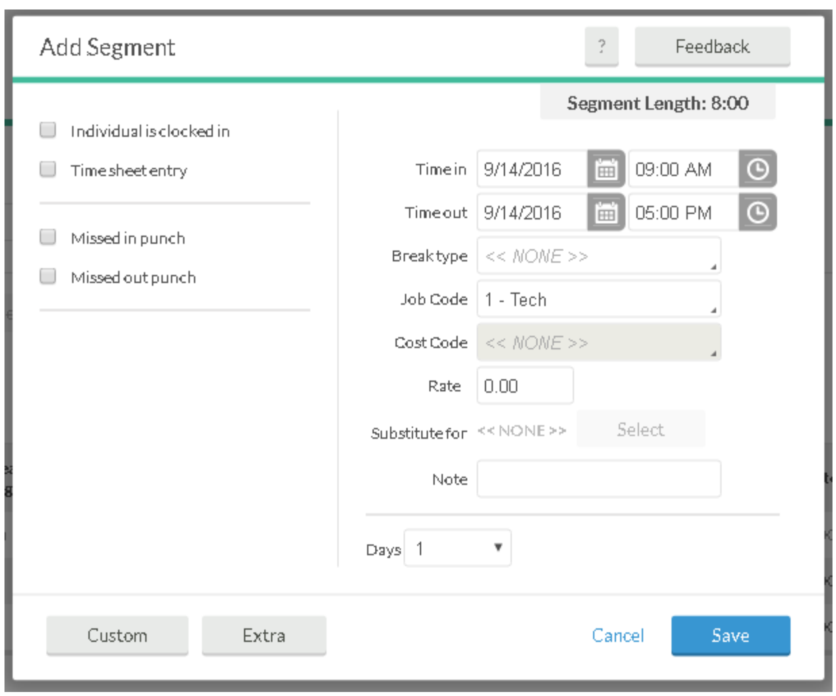
4. Review employee time for any errors or missed punches
5. Make corrections to employee time segments (See 'Manage Time', pg. 4)

ManagingTime:

The purpose of managing time is to correct any errors in employees' worked hours during the period.

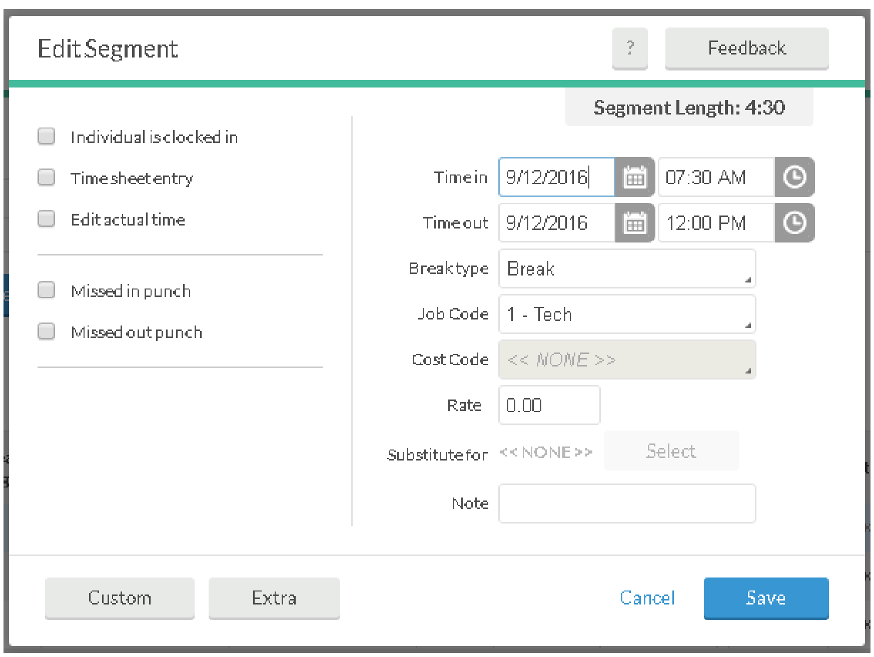
Adding Employee Time

1. Click on the **Add Segment** button.
2. Enter the date and time next to **Time in** and **Time out**. You can use the calendar to select a date and the clock icon to enter a time, or manually enter the date and time.
3. If you are clocking an employee in, check **Individual is clocked in** and click **Save.** This will allow the employees to clock out at the end of their shifts.
4. If this is a time sheet entry, click **Time sheet entry**. This will enable the **Hours** field and allow you to enter in a segment length. The **Date** and **Time in** will remain as the anchor point for the shift. When entering leave, companies typically choose this option.
5. If there is a break after this segment, select **Break type**.
6. To specify the job code worked for this shift click the **Job Code** drop-down.
7. If the segment was the result of a missed punch, you can indicate this by selecting **Missed in punch** and/or **Missed out punch**.



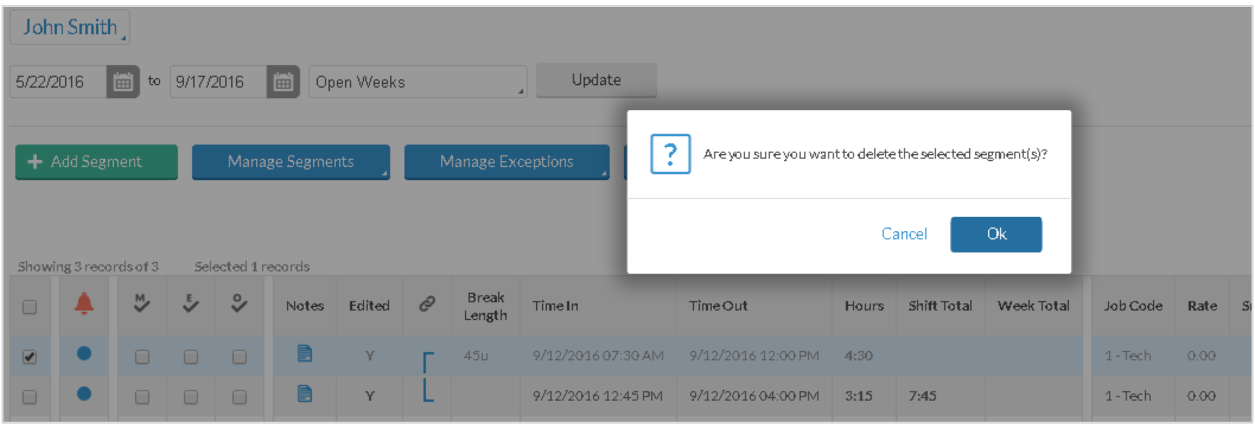
Editing Employee Time

1. Click on the segment to highlight it, then click **Manage**, then **Edit** to access the **Edit Segment** window. You can also double-click on the segment.
2. The **Time In** and **Time Out** fields can be edited.
3. If the employee is currently clocked in, enable **Individual is clocked in**.
4. If you want to make the segment a time sheet entry, check **Time sheet entry**. This will enable the **Hours** field and allow you to enter in a segment length. The **Date** and **Time in** will remain as the anchor point of the shift.
5. If rounding is enabled and you'd like to edit the actual times of the segment, check **Edit actual times**.
6. If you want to change the break type select the appropriate option under the **Break type** drop-down.
7. To change the job code worked for this shift, click the **Job Code** drop-down.
8. If this segment is going to earn a different hourly rate than the one normally assigned to this employee, enter it into the **Rate** box.
9. Click **Save**.



Deleting Employee Time

In order to delete a segment already in the system, click on the segment to highlight it, click **Manage Segments**, and **Delete**. This will bring up a prompt asking you to verify that you want to delete the segment. To delete the segment, click **Ok**.



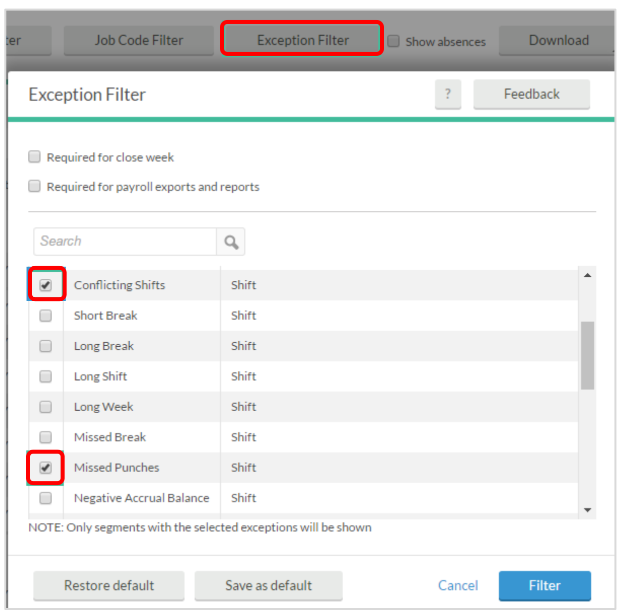
Managing Exceptions:

Exceptions are used to track any inconsistencies in worked segments, such as tardiness, missed punches, or segments awaiting approval.

Managing Exceptions:

1. To approve your employees' exceptions on a global level go to **Hours** > **Group Hours**.
2. Click the **Exception Filter** button and check each exception you want to manage and click **Filter**.

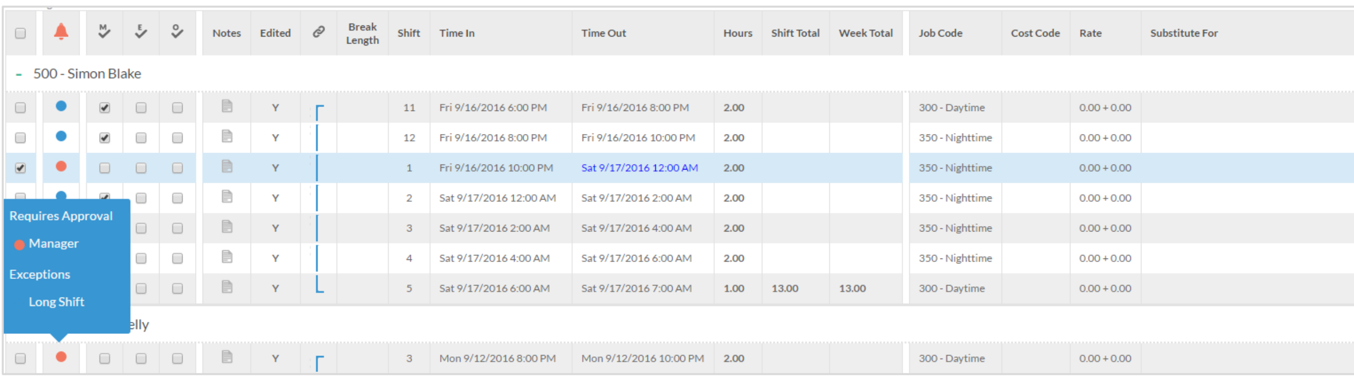
   The **Exception Filter** allows you to filter segments based on the exceptions flagged on your Employees' shifts. For example, if you are required to approve all missed punches before processing payroll, you can filter all the segments worked that week to see just those segments that have unapproved missed punches so you can focus on editing/approving only missed punches.



3. Next, set the date range to **Current Pay Period** and click **Update**. This will load all employees' segments that have unapproved exceptions specific to the exceptions checked in the **Exception Filter**.

4. You can determine which segments still have exceptions that require approval by looking at the exceptions column.

    - If a segment has a red dot, then there is an exception that still requires approval.
    - If a segment has a blue dot, or is blank, then all exceptions that require approval have been approved.



    - Exceptions can be displayed by hovering over a blue or red dot next to each segment. Those that require approval will be listed under the 'Requires Approval' section.
    - Anything listed under 'Exceptions' is informational only and does not require approval, but notifies you that a particular exception did occur during your employees' shift.

Managing Missed Punches:

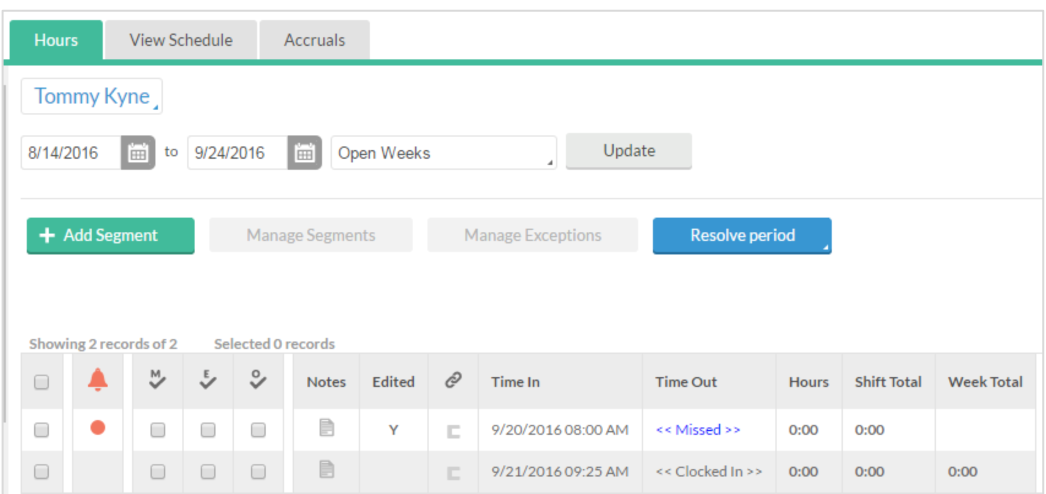
Missed punches occur when an employee fails to performs a clock operation, either for clocking in or out for a shift or break.

Entering in a Blank Missed Punch:

Record a blank time in/out and flag as a missed punch: These options create a blank time for the missed punch and allow the employee to perform the clock operation. The time of the missed punch must be entered before the week can be closed.

If the option to **record a blank time in/out and flag as a missed punch** is selected, then as a User (Manager) will need to enter the missed punch time on behalf of the employee.

When you browse to either Individual Hours or Group Hours, you'll see segments like the ones below:



To enter a missed punch time in place of the **<< Missed >>** segment:

1. Right-click on the segment with the << Missed >> punch and select **Edit**.
2. Next to the segment that is missing, enter in the time that the missed punch occurred.
3. Click **Save**.

Upon saving the corrected segment, the missed punch will be automatically marked as Approved.

Correcting an Entered Missed Punch:

If the missed punch time that has been entered (either by the Scheduler or the Individual), as pictured below, is inaccurate, you can correct it using the following steps:

1. Right-click on the segment with the inaccurate punch and select **Edit**.
2. Next to the segment that needs to be changed, enter the time that the missed punch occurred.
3. Click **Save**.

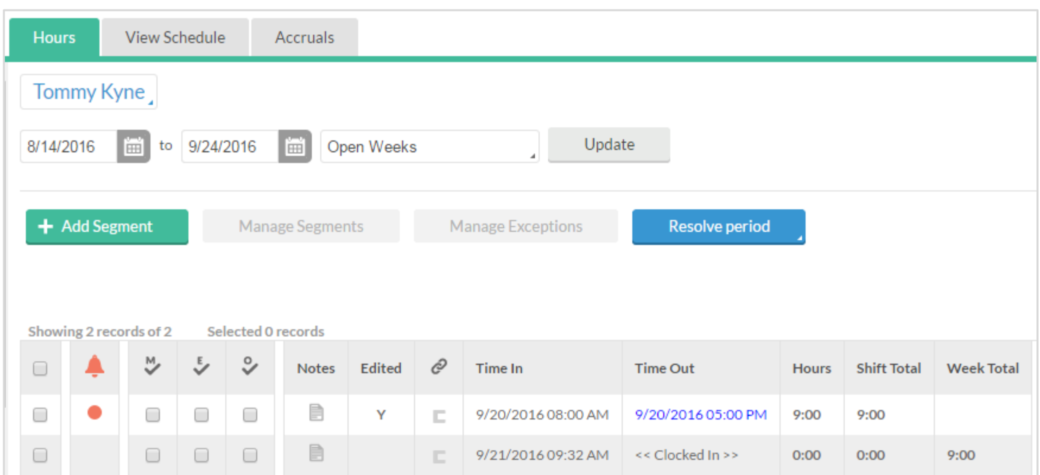
Upon saving the corrected segment, the missed punch will be automatically marked as Approved.

Approving an Entered Missed Punch:

Record the scheduled time in/out (if available) and flag as a missed punch: If the employee is working on a schedule, this option records the time they were supposed to clock in or out, and allows the employee to perform his/her clock operation.

Allow the employee to enter the time in/out and flag it as a missed punch: This option allows the employee to enter the time that they were supposed to clock in or out and flags it as a missed punch.

When you browse to **Individual Hours** or **Group Hours**, you will see segments like the ones below.



If the missed punch time that has been entered (either by the Scheduler or the Individual) is correct, approve the segment as follows:

1. Highlight the segment by checking the box to the far left.
2. Click on **Manage Exceptions** and set **Missed Punches** to **Approve**.
3. Click **Apply**.

To approve multiple missed punches, simply click the **Resolve Period** button and follow the same steps.

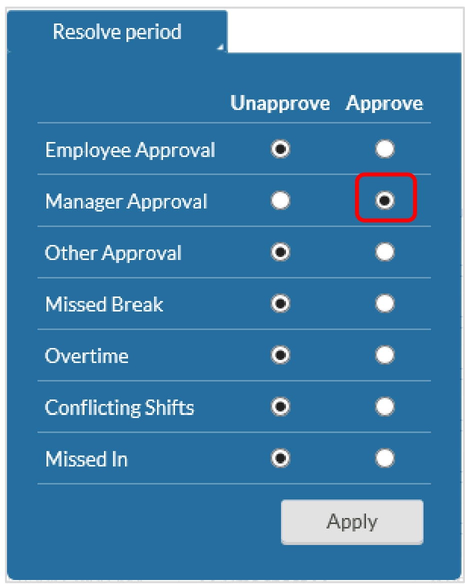
You can also approve multiple missed punch exceptions for multiple employees using the same methods described above in the **Group Hours** tool.

Approving Exceptions/Approving Hours:

All exceptions that require approval need be approved for payroll to be processed.
Manager approval is a separate process from approving missed punches and all other exceptions.

Approving Exceptions:

1. Log into TimeClock Manager
2. Click on **Hours > Group Hours.**
3. Set your Date Range to **Current Pay Period** and click **Update**.
4. Click the **Resolve Period** button and select the radial under the **Approve** column next to the exception you want to approve and click **Apply**.



Note: Resolve Period will approve or unapprove ALL exceptions, not just the ones visible on the current page you are viewing.

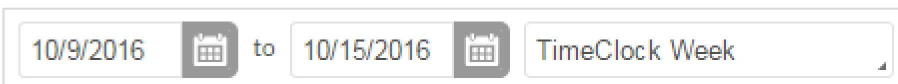
Reports

Running reports will allow you to review information regarding your employees' hours in a variety of formats. These reports can be downloaded or sent directly to your printer.

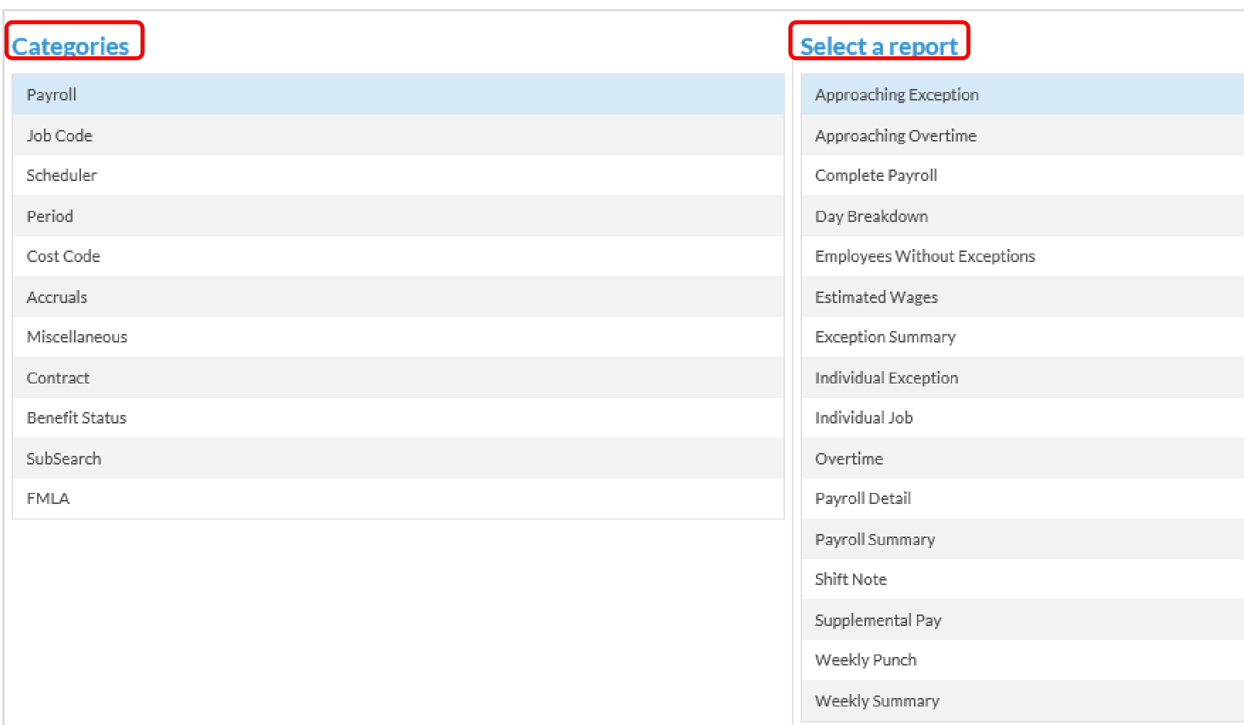
Running a Report

1. Select the report you'd like to run from the **Period Reports** screen (**Hours** > **Period Reports**).
2. By default, the report that you run will include all employees. To limit which individuals will appear on the report, set an **Employee** or **Job Code** filter.

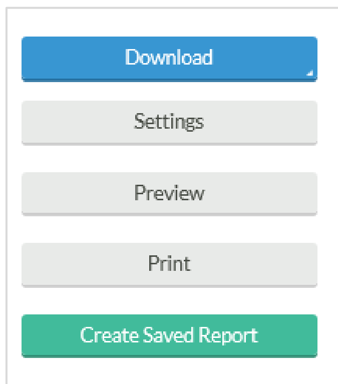
3. Enter in the date range for the report or select a pre-defined date range from the drop-down.



4. After selecting one of the report categories, select the report you'd like to run.



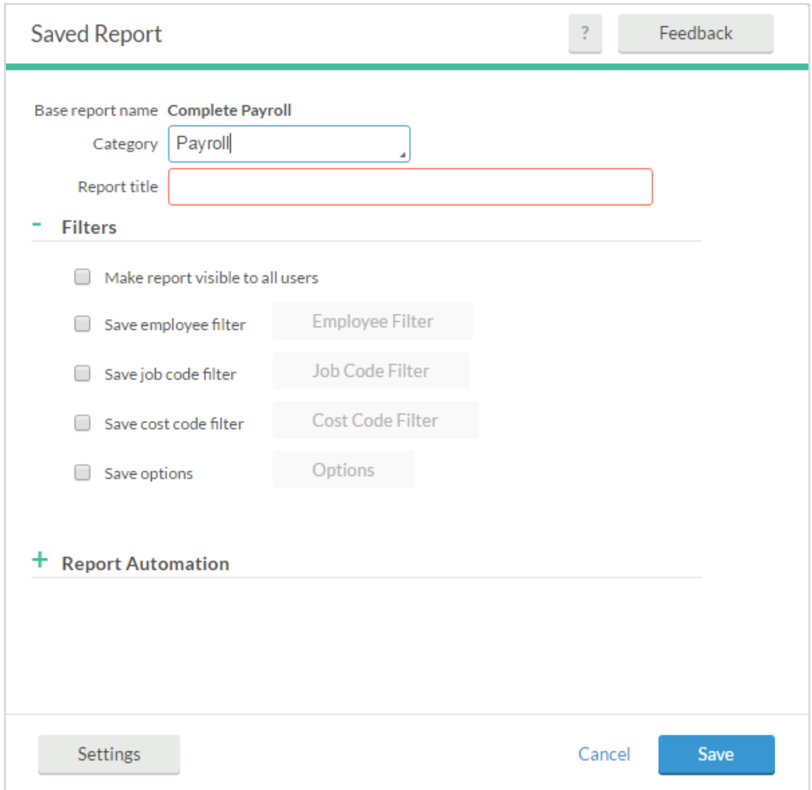
5. Click on the **Download** button to choose which output format you would like to download:
    - HTML: The output is produced in a .html file that can be opened by a web browser.
    - PDF: The output is produced in a .pdf file that can be opened in Adobe Reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.
    - OpenXML: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice.
6. Click on **Settings** to change individual items on the report. These settings are unique to each report.
7. Click **Preview** to quickly see the report and make sure that it includes all of your criteria.
8. Click **Print** to send the report directly to your printer for physical copies.



Saving a Report

Creating a Saved Report will allow you to save any filters or settings to a report's defaults, allowing you to run the report without having to set up configurations each time.

1. In the **Period Reports** window, select the report for which the saved report will be created.
2. Click the **Create Saved Report** button.

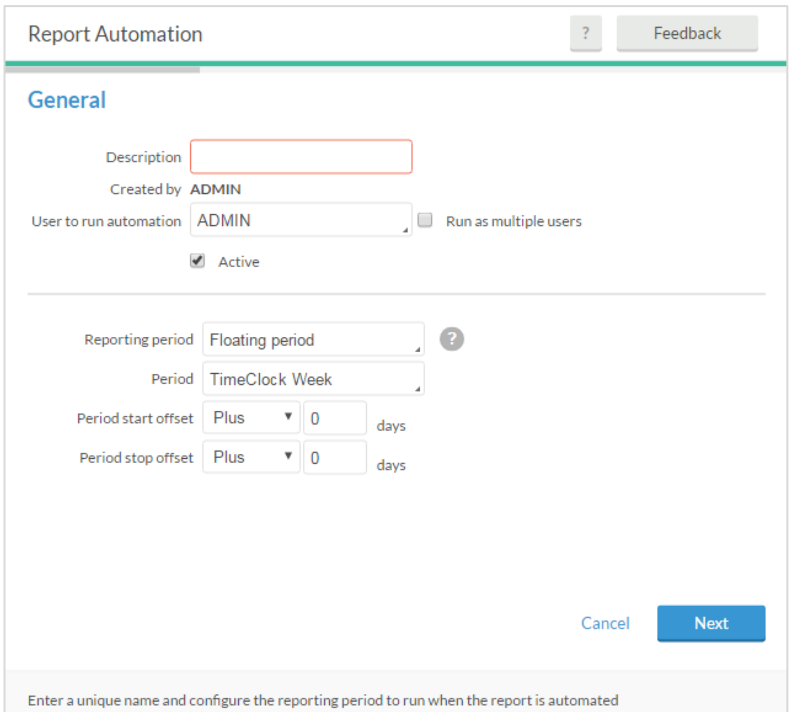


3. Double-click the 'Category' drop-down to choose an existing report category, or create a new category by typing it into the box. This represents the section that the report will be filed under when viewing your saved reports.
4. To choose specific employees to include in the report, place a check next to **Save employee filter**, and click **Employee Filter**.
5. To choose specific job codes to include in the report, place a check next to **Save job code filter**, and click **Job Code Filter**.
6. To adjust any report-specific settings, click on the **Settings** button at the bottom of the window.
7. Select **Save**

Automating a Report

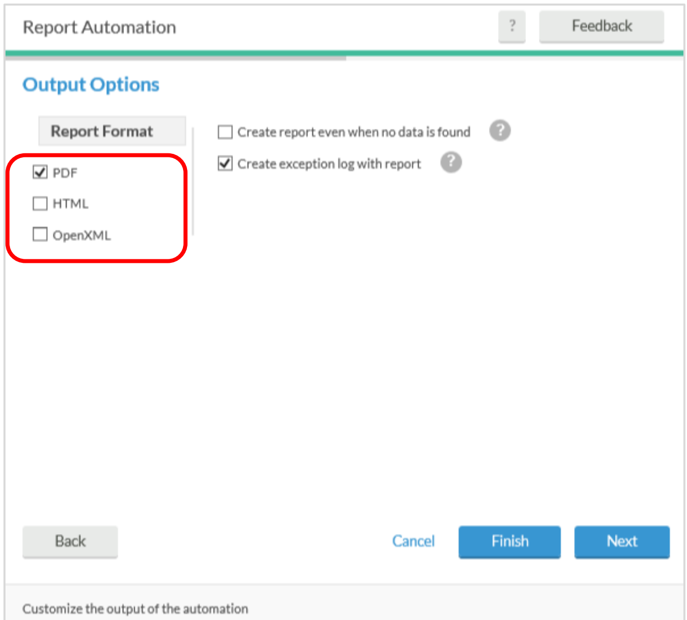
Once you've created a Saved Report, you can also automate that report. This will allow TimeClock Plus to run a report on your behalf, without the need to log into the software, and have that report e-mailed to yourself or any desired recipients.

1. From the **Saved Report window**, click the **Add** button under **Report Automation**.

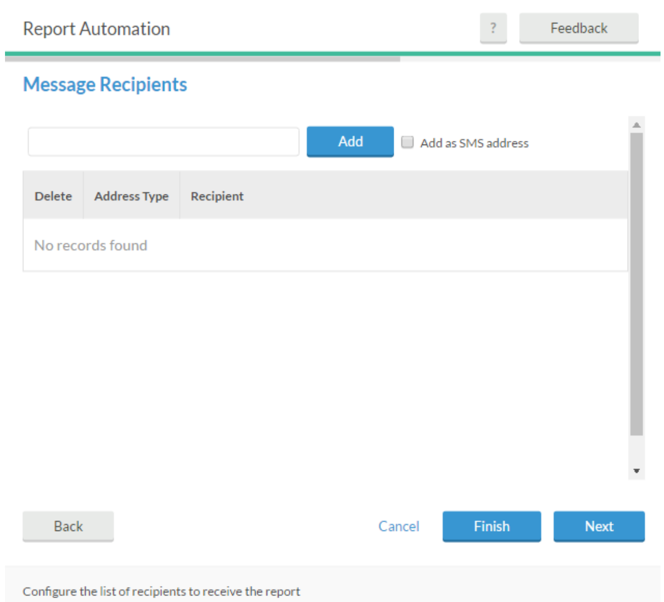


2. Use the 'Description' field to enter a name for the report automation.
3. Select a **User to run automation**. This is the user whose information will be used to send out any e-mails that are sent with the automation. This user must have an e-mail defined under their **User Profile** (**Configuration** > **User Profiles**).
4. Beneath that, select the period of time that you want to include in the report
5. Click **Next**.

6. On the **Output Options** screen, select the **Report Format** in which the report will be run.

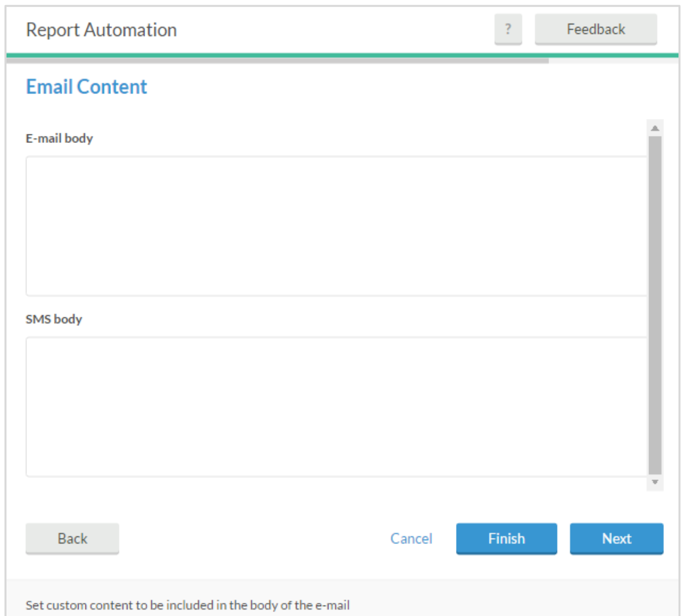


7. Click **Next**.
8. In the **Message Recipients** window, enter the e-mail address of each individual who will be receiving this report and click **Add**.

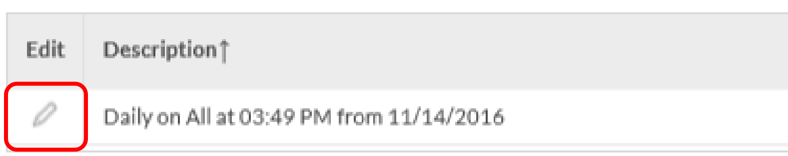


9. Click **Next**.

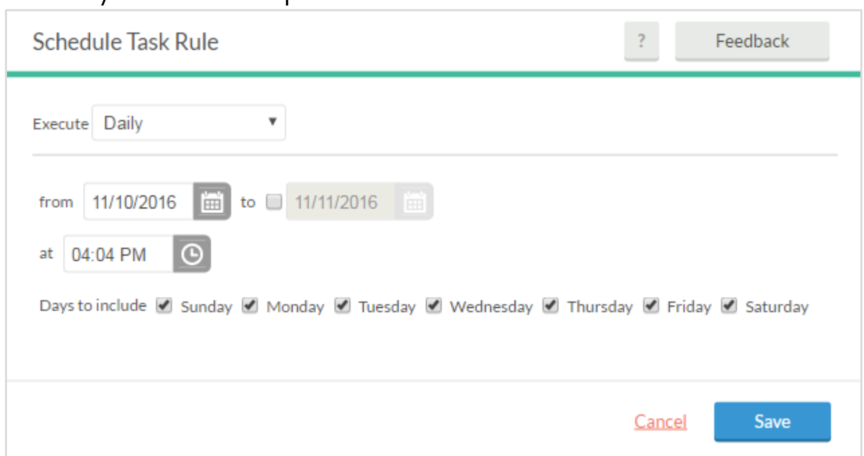
10. On the **Email Content** tab, enter what you would like to appear in the body of the email with the report when it is sent out.



11. Click **Next**.
12. On the **Task Scheduling** tab, you'll get to choose when this report gets sent out. By default, this report will be configured to send out daily at the time you created it. To edit that setting, click the **Edit** icon.



13. Next to **Execute**, select the frequency with which this report will be sent.
14. Select the date you want this report to begin sending and an expiration date (if necessary).
15. Enter the time of day to send the report.

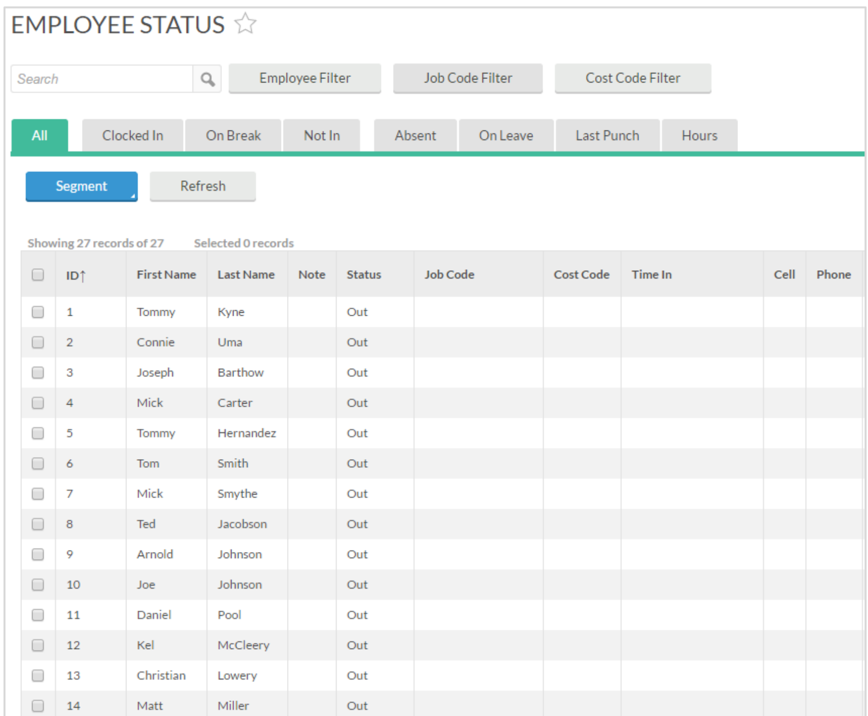


16. Click **Save** on the Schedule Task Rule window.
17. Click **Finish** in the Report Automation window.
18. Click **Save** on the Saved Report screen.

Employee Status

The Employee Status screen allows managers to monitor employees in real time. From this screen, you can see which employees are clocked in, what job code they are working in, and how long the employee has been clocked in.

Employee Status Tabs

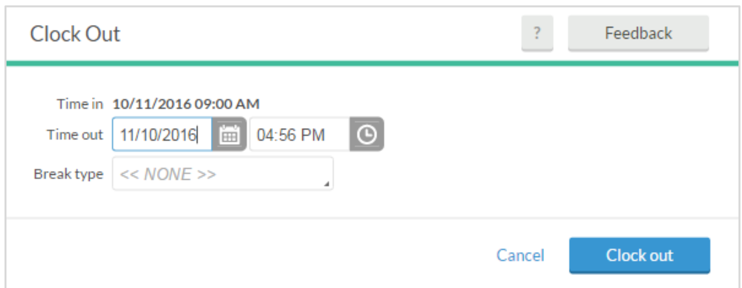


ID↑	First Name	Last Name	Note	Status	Job Code	Cost Code	Time In	Cell	Phone
1	Tommy	Kyne		Out					
2	Connie	Uma		Out					
3	Joseph	Barthow		Out					
4	Mick	Carter		Out					
5	Tommy	Hernandez		Out					
6	Tom	Smith		Out					
7	Mick	Smythe		Out					
8	Ted	Jacobson		Out					
9	Arnold	Johnson		Out					
10	Joe	Johnson		Out					
11	Daniel	Pool		Out					
12	Kel	McCleery		Out					
13	Christian	Lowery		Out					
14	Matt	Miller		Out					

- The **All** tab allows the user to view every employee they have access to, their status, and (if clocked in) their job code, time in, and location.
- The **Clocked In** tab only shows the clocked-in employees, as well as the job code that employees clocked in to, the time they clocked in, and the location of the clock operation.
- The **On Break** tab only shows employees that are currently on break, as well as the job code that employees is clocked in to, the time they took a break, the duration of the break, and the location of the clock operation.
- The **Auto Out** tab only shows employees that are clocked into an auto-out job code, the job code that employees is clocked into, the time they clocked in, and the location of the clock operation.
- The **Not In** tab only shows employees that are not currently clocked in.
- The **On Leave** tab shows employees currently clocked into a leave code as well as any shift notes about that segment.
- The **Last Punch** tab shows employees, their status, their last clock in, and their last clock out.

- The **Hours** tab shows employees, their hire date, the amount of hours worked today, the amount of hours worked this week, the employees' status, and the last time that employee clocked out.

Clocking Employees Out from Employee Status

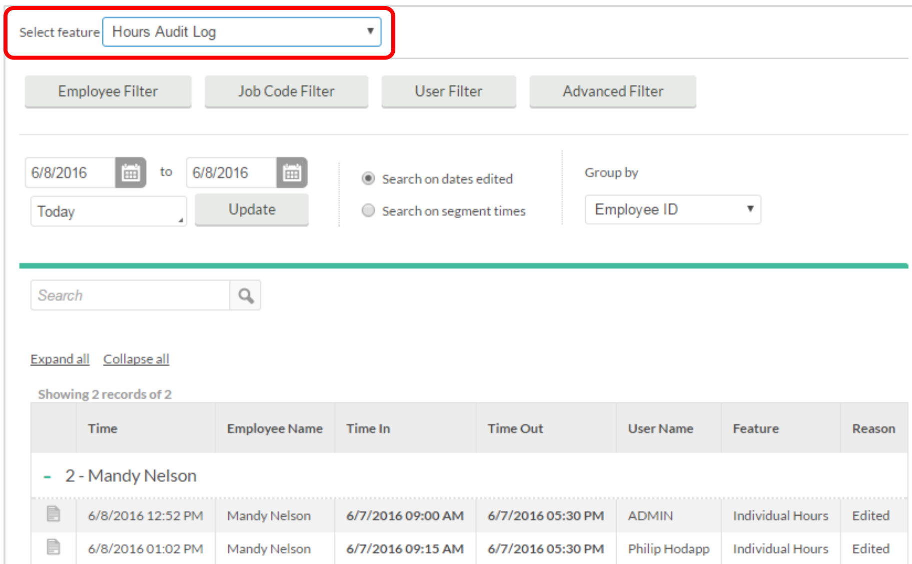


1. Select the employee(s) you wish to clock out from the **Employee Status** list.
2. Right-click on the employee and choose **Clock Out**.
3. In the **Clock Out** window, enter the date and time you want the segment to end and click on **Clock out**.

Audit Log

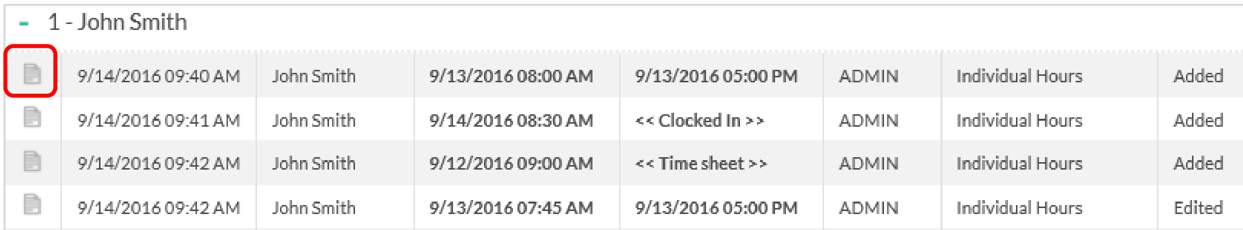
The Audit Log allows you to examine changes that have been made to employees' hours, and profiles as well as situations where employees have not completed a clock operation.

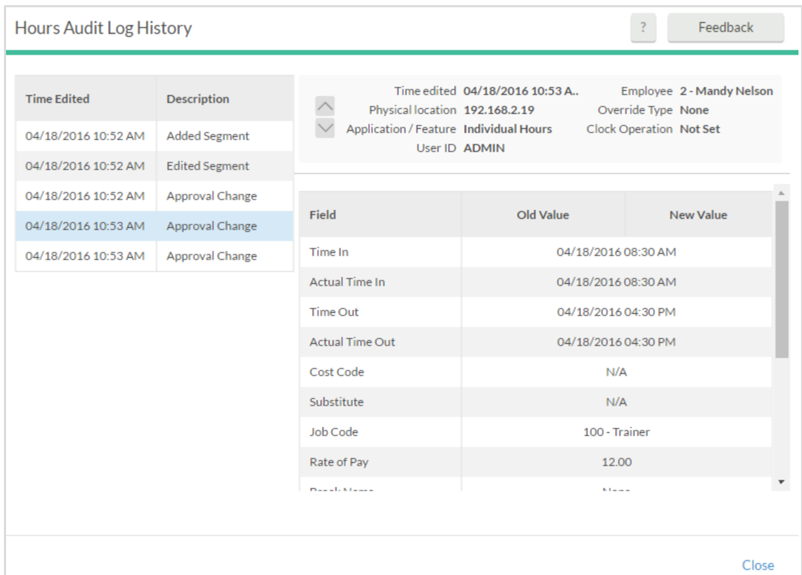
Hours Audit Log



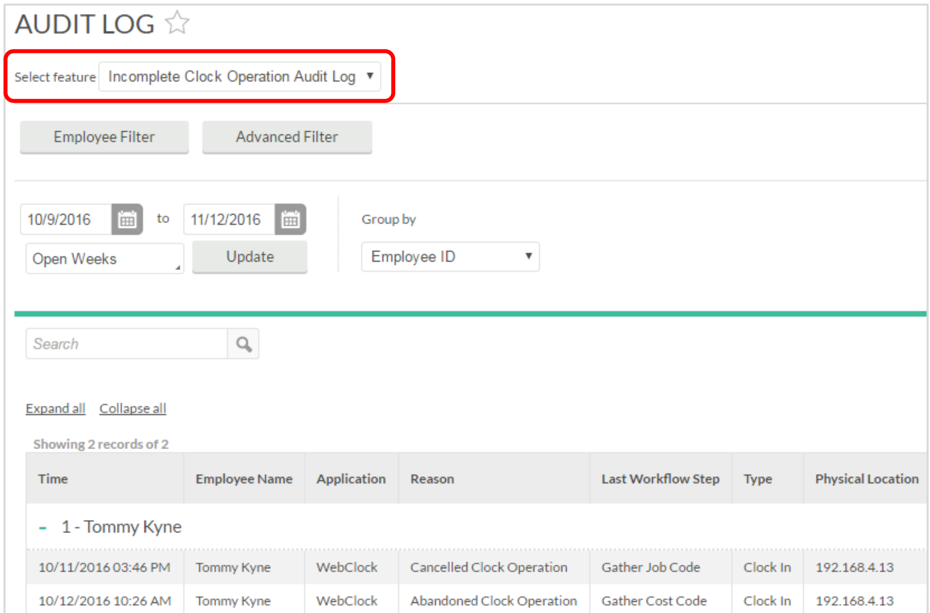
1. Browse to **Tools** > **Other Tools** > **Audit Log**.
2. Next to **Select Feature**, select **Hours Audit Log**.
3. By default, this feature will load all of the changes that have been made to the present day. To only view certain changes, use one of the following filters:
   - **Employee Filter** to select which employees will appear.
   - **Job Code Filter** to select which job code hours will appear.
   - **User Filter** to see changes made by a particular user.
   - **Advanced Filter** to see particular types of clock operations or changes made using a specific software tool.
4. To view changes made to hours during a particular timeframe, change the date range boxes.
5. Once necessary changes have been made, click **Update** to view audits based on the specified criteria.

6. Click the icon next to the date to see the details of any changes made to the employees' hours including what changes were made, when they were made, and who made them.





Incomplete Clock Operation Audit Log



1. Browse to **Tools** > **Other Tools** > **Audit Log**.
2. Next to **Select Feature**, select **Incomplete Clock Operation Audit Log**.
3. By default, this feature will load all of the incomplete operations that have been made on the present day. To only view certain changes, use one of the following filters:
   - **Employee Filter** to select which employees will appear.
   - **Advanced Filter** to see incomplete operations from all features, or specific features.
4. To view incomplete operations during a particular timeframe, change the date range boxes.
5. When any changes needed have been made, click **Update** to view all incomplete operations accordingly.

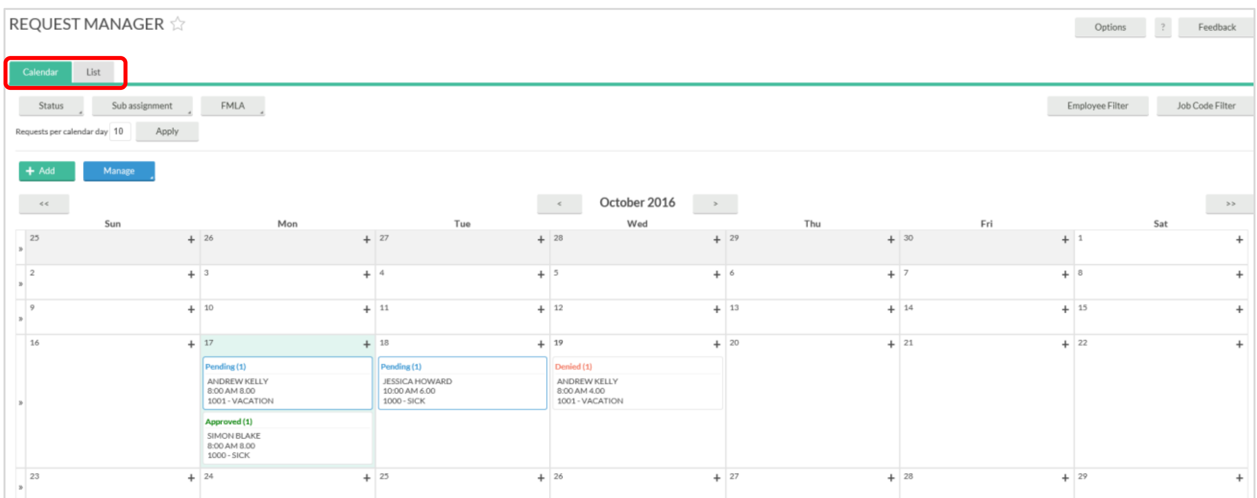
Reviewing Time-Off Requests:

Request Manager allows users to view, add, edit, approve, and deny employee time off requests. Time-off requests can be submitted by the individual or created by the user in any leave code(s) that the employee may have access to.

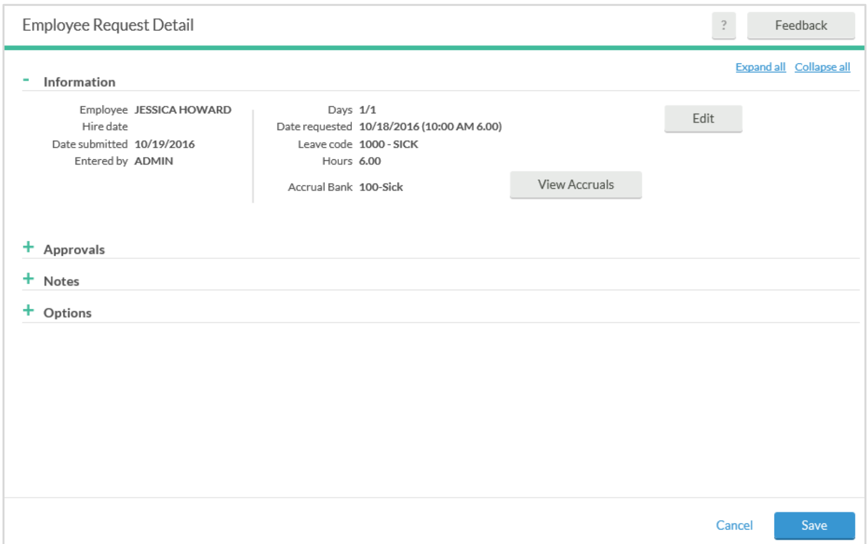
Viewing Requests Submitted:

Log into TimeClock Manager

6. Click on **Tools** > **Request Manager**
7. By default, employee requests will be visible in a **Calendar** view. In order to view employee requests in a sortable list, select the **List** tab.



8. To view detailed information on a request submitted and how its approval will be handled, right-click and select **Detail**.



Managing Time-Off Requests:

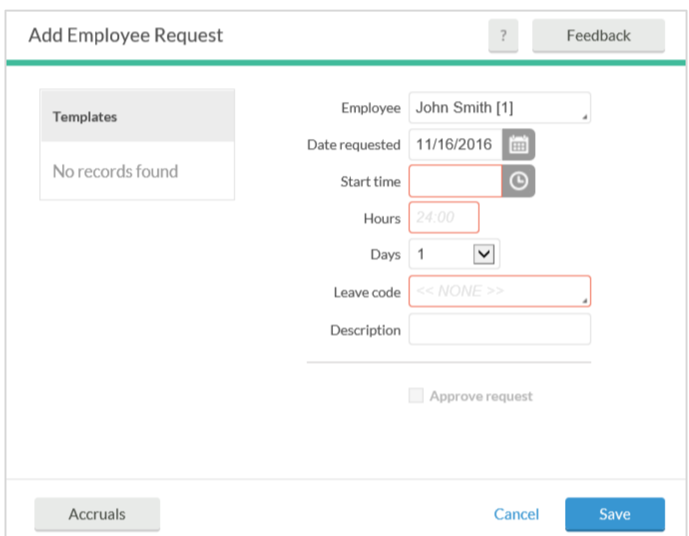
Request Manager allows the user to view and approve any time-off requests that have been submitted by employees through either the WebClock or on a Remote Data Terminal. Additionally, employee time-off requests can be manually added through this feature.

Adding Requests for Employees:

While employees can create their own request segments, users are also able to create request segments for employees assigned to them.

Log into TimeClock Manager to create a request segment:

1. Browse to **Tools** > **Request Manager**
2. Click on the **Add** button on the information bar or select the plus sign in Calendar view on an appropriate day.



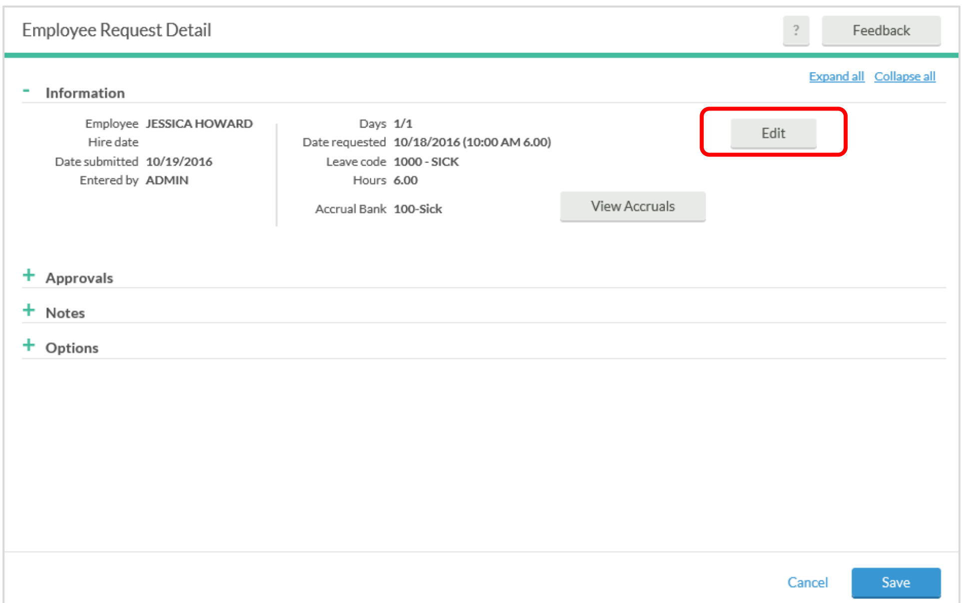
3. Select the employee for whom you would like to create a time-off request for from the **Employee** dropdown.
4. Select the **date** for the request.
5. Select the **Start time**, which will be the anchor point for the leave time sheet.
6. Enter in the length of the leave request in the **Hours** field.
7. Use the **Days** dropdown to enter the request for multiple consecutive days.
8. Select a **Leave Code for** this time-off request from the drop-down menu.
9. Enter in a **description** for this leave request.
10. Click **Save** to add this request.

Editing Requests Submitted by Employees

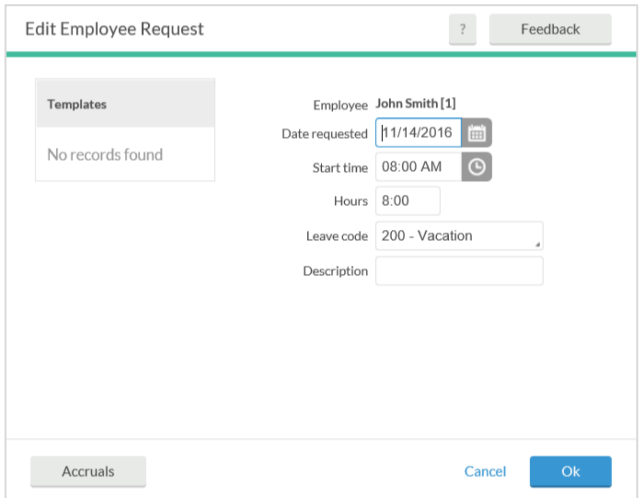
Managers are able to edit the details of pending requests entered by users or individuals. This allows users to change the date range, leave code, or other aspects of the request before it is approved.

Log into TimeClock Manager to edit a request:

1. Browse to **Tools** > **Request Manager**.
2. Select the request from either **Calendar** or **List** view, then select **Detail** by right-clicking on the segment or selecting it through the **Manage** dropdown button.



3. On the **Employee Request Detail** window, you will be able to see information regarding the request as well as its approval status and description. To change the date, time, or job code, click the **Edit** button.



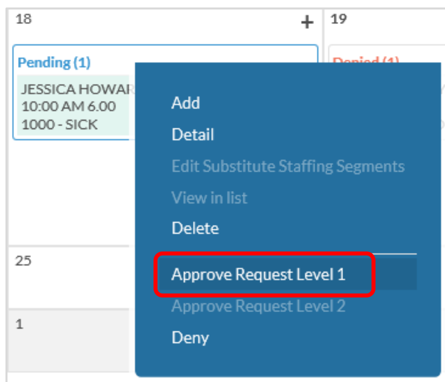
4. Make any changes in the **Edit Employee Request** screen and Select **Ok**.
5. A note can be entered about the request in the **Manager Note** section. This allows users to keep track of reasons for individual requests.
6. Click **Save** to commit these changes to the request segment.

Approving/ Denying Time-Off Requests

Once a requested time-off segment has been entered by either the employee or the manager, a user with proper permissions can approve or deny the request. Approving or denying a segment also removes the ability to edit that request.

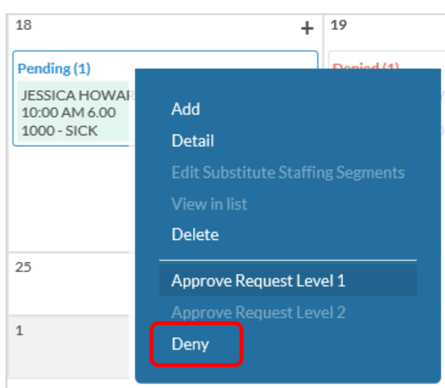
Approving a Time-Off Request:

5. Select the request entered from either **Calendar** or **List** view.
6. Right-click on the segment or select the **Manage** dropdown.
7. Select the level of approval you would like to grant.
8. Once all required levels have been approved, the segment will be marked as **Approved**.



Denying a Time-Off Requests

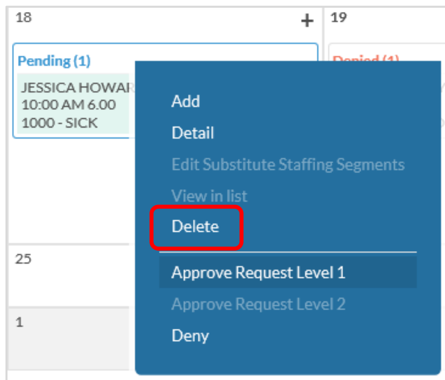
1. Select the request entered from either **Calendar** or **List** view.
2. Right click on the segment or select the **Manage** dropdown.
3. Select **Deny** from the list to mark the segment as denied and prevent further editing.



Deleting Time-Off Requests

Requests can also be deleted if they have been entered in error. Deleting a request will completely remove it from the system.

1. Right-click on the segment or select the **Manage** dropdown
2. Click **Delete**
3. On the confirmation screen, click **Ok** to permanently delete the request.



Employee Accrual Balances:

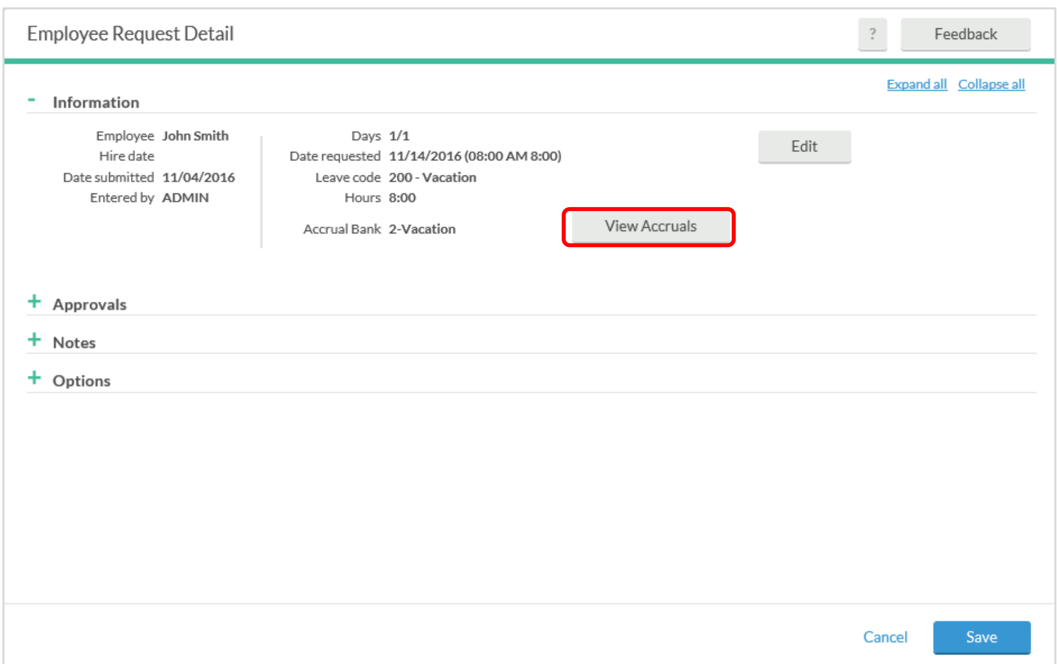
Accruals are used within TimeClock Plus to maintain a balance of time that an employee earns, typically for any type of leave (Example: vacation, sick, or comp time).

If accruals are being tracked in TimeClock Plus, it is recommended to review the Employee Accrual Balance before approving a Time-Off Request.

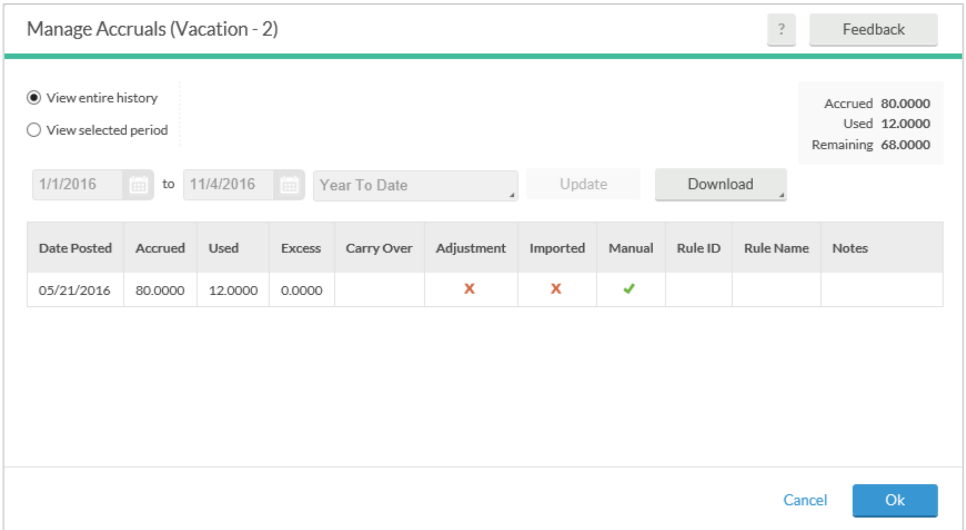
Viewing Employees' Accrual Balance

Log into TimeClock Manager to edit a request:

1. Browse to **Tools** > **Request Manager**
2. Select the request from either **Calendar** or **List** view, then select **Detail** by right-clicking on the segment or selecting it through the **Manage** dropdown button.



3. On the **Employee Request Detail** window, you will be able to see information regarding the accrual bank that is assigned to the request.
4. To view more information regarding the hours the employee has available select **View Accruals**.



5. Review the accruals to confirm that the employee has enough time accrued.
6. Select **OK** to continue. If the Time-Off Request needs to be edited, follow the steps in the section "Editing Requests Submitted by Employees".
7. To approve or deny the request, follow the steps in the "Managing Time-Off Requests" section.

Reviewing Approved Leave Time:

Once a time-off request is approved for an employee by all managers that are required, the timesheet gets automatically added to the employee's hours.

In order to review and confirm that the timesheets were added to the employee, follow the steps below.

Reviewing Timesheets:

5. Log into TimeClock Manager
6. Click on **Hours > Individual Hours**
7. Select the employee to review the hours
8. Set your date range to include the date the request was submitted and click **Update**.
9. Confirm the timesheet entry is correct and approve the hours as needed.

Showing 5 records of 5   Selected 0 records

					Notes	Edited		Time In	Time Out	Hours	Shift Total	Week Total	Job Code	Rate	Substitute For
						Y		11/14/2016 08:00 AM	<< Time sheet >>	8:00	8:00		200 - Vacation	0.00	
						Y		11/15/2016 09:00 AM	11/15/2016 05:00 PM	8:00	8:00		1 - Tech	0.00	
						Y		11/16/2016 09:00 AM	11/16/2016 05:00 PM	8:00	8:00		1 - Tech	0.00	
						Y		11/17/2016 09:00 AM	11/17/2016 05:00 PM	8:00	8:00		1 - Tech	0.00	
						Y		11/18/2016 09:00 AM	11/18/2016 05:00 PM	8:00	8:00	40:00	1 - Tech	0.00	

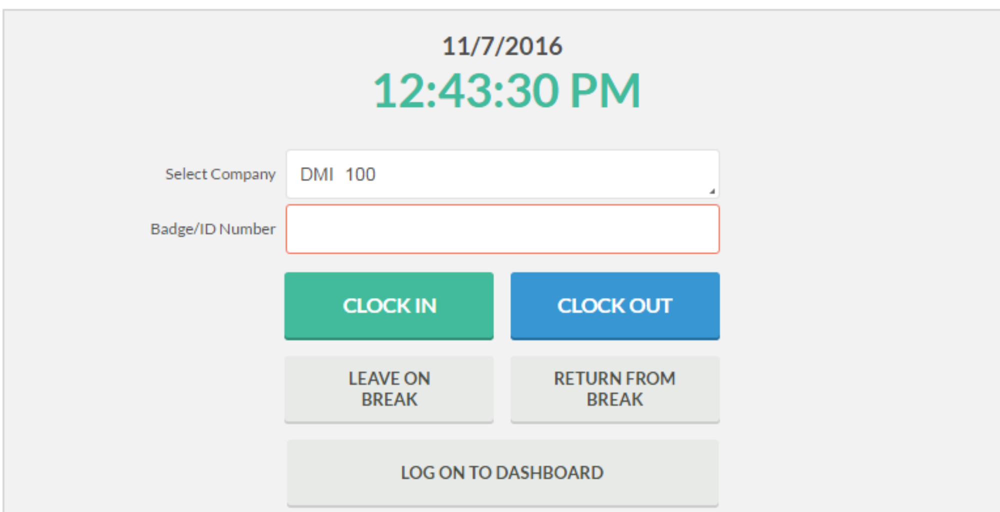
Clock Operations:

The following instructions for Clock Operations are demonstrated on the WebClock application, but this instructions apply to RDT 300/400 Series clocks as well.

Clock In/Out:

1. From the Quick Start menu the employees will enter their Employee ID (specified in TimeClock Plus Manager) in the Employee ID field.
2. At the beginning of a shift the employees will select **CLOCK IN** and will be guided through several screens where the employees may see messages sent to them by their manager and a list of job codes they are assigned. When the clock operation is complete the employees should receive a message "Clock Operation Successful"
3. To go on break/lunch, the employees enters their Employee ID and selects **LEAVE ON BREAK**.
4. To return from break/lunch, employees enters their Employee ID and selects **RETURN FROM BREAK**.
5. At the end of the shift employees will enter their Employee ID and select **CLOCK OUT**.

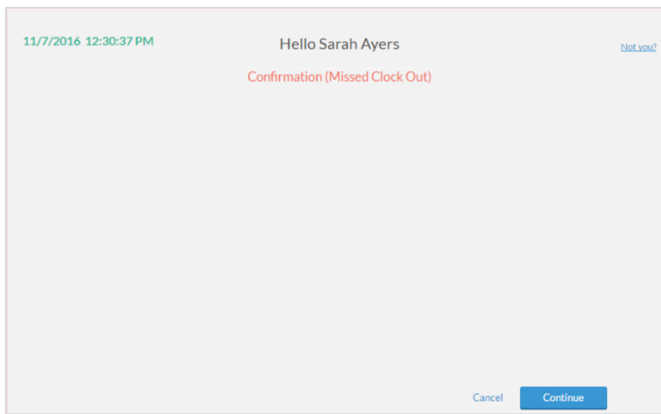
For every clock operation the employee should receive the message "Clock operation successful"



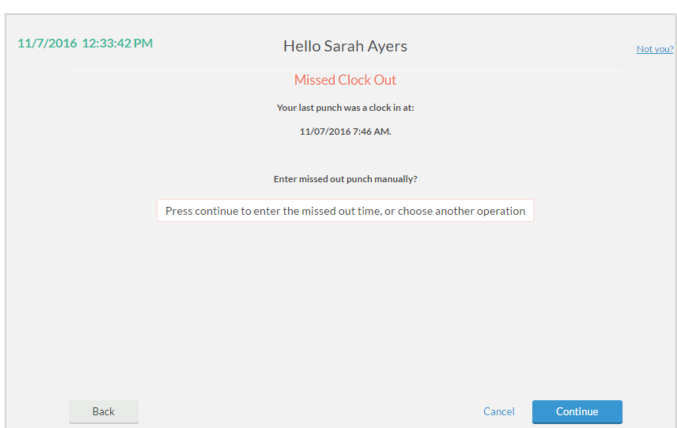
Missed Punches:

Occasionally employees will forget to clock in or out which will generate a missed punch during their next clock operation. The Missed Punches tool not only tracks missed clock operations, but also allows employees to continue with subsequent clock operations while doing so.

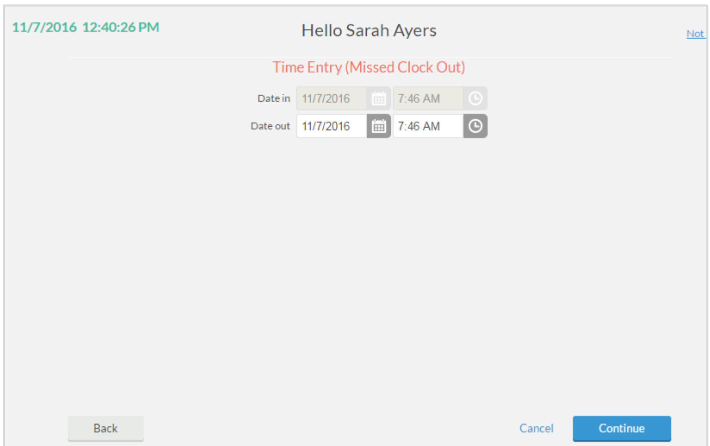
- If an employee has missed a punch in or out, upon performing the next clock operation, a screen will be displayed requesting confirmation that a missed punch has occurred.
- To verify this is correct, the employee will click Continue
- If the employee clicks **Cancel**, the entire clock operation will be canceled, a missed punch will not be created, and the employee will not be able to clock in/out



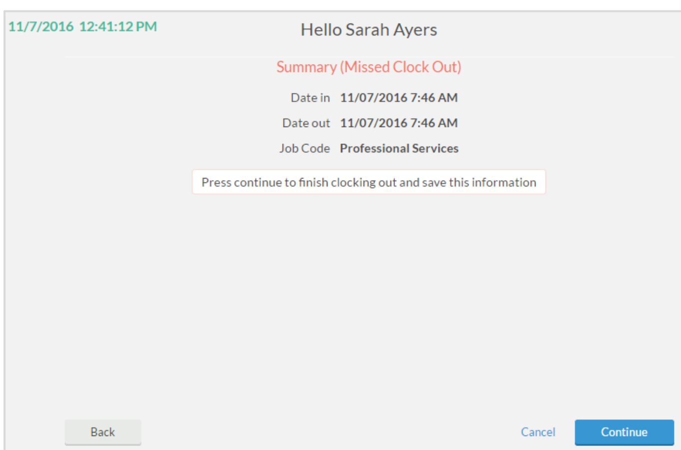
2. The next screen will verify that the missed punch was a missed out or missed in then specify the date and time of the last clock operation.
   - To verify this is correct, the employee will click Continue
   - If the employee clicks Cancel, the entire clock operation will be canceled, a missed punch will not be created, and the employee will not be able to clock in/out



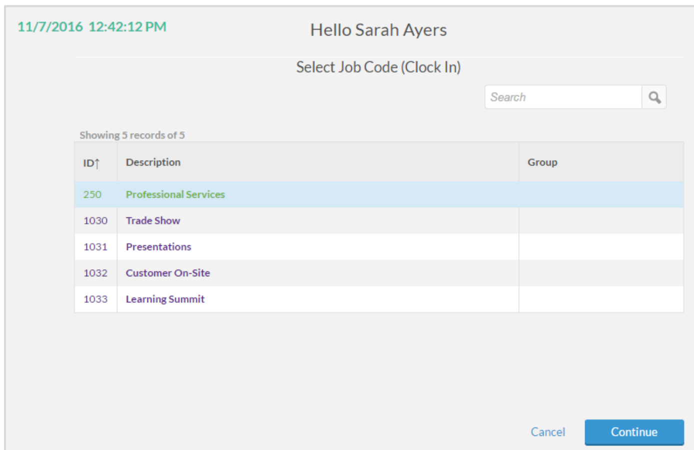
3. The next screen will prompt the employee to enter the date and time in or date and time out for the clock operation that he/she missed.
    - To verify, the employee will click **Continue**
    - If the employee clicks Cancel, the entire clock operation will be canceled, a missed punch will not be created, and the employee will not be able to clock in/out



4. The next screen will provide a summary of the missed punch date in and time in or date out and time out.
    - To verify, the employee will click **Continue**
    - If the employee clicks Cancel, the entire clock operation will be canceled, a missed punch will not be created, and the employee will not be able to clock in/out



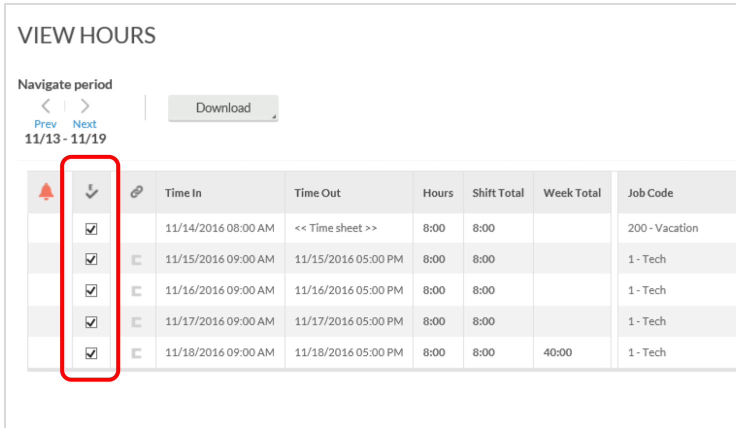
5. After this screen, the employee will select a job code for the current clock operation
    - To verify, the employee will click **Continue**
    - If the employee clicks Cancel, the entire clock operation will be canceled, a missed punch will not be created, and the employee will not be able to clock in/out



6. If the clock operation was successful, the employee will receive a **"Clock operation successful"** message.

View/Approve Hours:

1. From the Quick Start menu, the employee will enter his/her Employee ID number in the Employee ID field and click **LOG ON TO DASHBOARD.**
2. From the Dashboard, click **VIEW**, then **Hours.**
3. Under VIEW HOURS, the employee can see all shifts they have worked for the current week and use the navigation arrows in the top left to view previous weeks.
4. Employees can check the box under the column to approve their hours. This is their electronic signature verifying their hours are correct.



View/Submit Time-Off Requests:

1. From the Quick Start menu, the employee will enter his/her Employee ID number in the Employee ID field and click **LOG ON TO DASHBOARD.**
2. From the Dashboard, click **REQUESTS.**
3. From the Request menu, employees can view pending, approved, and denied requests.
4. To add a time-off request, click the + Add button.
5. Enter a start time for when your time off will begin
6. Enter how many hours you are requesting off
7. Select how many days you are requesting
8. Select the leave code that applies to the type of time off requested
9. Lastly, enter a short note explaining why you are requesting time off (if required)
10. To submit the time-off request, click **Save**